TSR Procedures

BPA Transmission Business Practice

Version 1
9/1/2016
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For more information, visit the BPA Transmission Business Practices page or submit questions to techforum@bpa.gov.

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A. Submitting a Deferral

1. Contact the Reservation Desk at 360-418-8499 to defer a CF6 TSR to request activation of the Yearly Product. IR or GF type TSRs may not be deferred.

2. Log in to webSmartOASIS.

3. Click Transactions and then click Reservation Summary.

4. Click the Server Filter Options icon to access the Filtering Options.

5. Type the Assign Ref of the TSR to be deferred into the Ref: field and then click Apply.

6. Click the Assign Ref number to open the Transmission Reservation Detail.

7. Click the New TSR icon to open the New TSR Form.

8. Update the following fields:
   a. Request Type = DEFERRAL
   b. Start and Stop = Move Stop date/time in tandem with Start date/time
   c. MW = Partial MW deferral requires MW change. Type MW amount to be deferred. Amount deferred cannot be greater than original demand.
   d. Related Ref = Parent TSR Related Ref
9. Do not change the Source Sink, POR, POD, Service or Sale Ref fields.

10. Click the Get Price button and click OK in the message window.

11. Click the Enter TSR icon to open the Confirm Entry of TSR Page.

12. Review changes for accuracy and submit or edit as needed.
   a. If changes are correct, click the Submit button
   b. If an edit is needed or an error occurs:
      i. Click the Back icon and correct.
      ii. Click the Enter TSR icon when correction is complete.

**B. Submitting a Transfer**

1. Assignee Requirements
   a. The Assignee must submit a TSR over webSmartOASIS to initiate a Transfer.
   b. The TSR must be submitted at least 60 calendar days in advance of the Service Commencement Date of the Transfer.
   c. BPA Transmission Services will consider Transfers on shorter notice, if feasible.
   d. The TSR must include:
      i. Request Type: Original
      ii. A TSR submitted with a FULL_TRANSFER or PART_TRANSFER Request Type will be given a status of DECLINED and receive no further consideration, as BPA Transmission Services does not support these webSmartOASIS Request Types.
      iii. Deal-Ref: Reseller's AREF number
      iv. Comment Section: A statement indicating that the request is related to an Transfer
      v. POD, POR, Sink, Source: must match the Reseller's reservation
      vi. Service Type: Long-Term Firm-YEARLY PTP or Long-Term Firm-CF7 PTP, depending on whether LTF PTP or Conditional Firm PTP Transmission Service is being transferred
      vii. Increment: Yearly
      viii. Start Time: 00:00 on the first day of a calendar month equal to or later than the Start Time and earlier than the Stop Time of the Reseller's reservation
      ix. Stop Time: The Stop Time of the Reseller's reservation
      x. The resulting term of the TSR must be a year or longer

2. After the TSR is submitted on webSmartOASIS, the Transfer Template must be completed.
   a. The Assignee and Reseller must both sign the OASIS Transfer Template.
b. The OASIS Transfer Template must be postmarked and mailed to the Reseller's BPA Transmission Services Account Executive within five Business Days of the OASIS Queue time of the Assignee's TSR.

c. Failure to submit the OASIS Transfer Template within the timeframe specified in b above will result in a minor deficiency.

   i. BPA Transmission Services will notify the Assignee of the deficiency by email.

   ii. If the Assignee fails to remedy the deficiency within 10 Business Days following notification of such deficiency, the TSR will be DECLINED and receive no further consideration.

3. Provided the above conditions are met, BPA Transmission Services will modify the Assignee's and Reseller's Transmission Service Agreements (TSA) to reflect the Transfer. BPA Transmission Services will provide copies to both parties for signature.

   a. If either the Assignee or the Reseller fails to return the signed Transmission Service Agreements to BPA Transmission Services within 15 calendar days following the Date of Tender, the Transfer offer will be void.

      i. BPA Transmission Services will change the status of the Assignee's request to DECLINED.

   b. Following receipt of the signed Transmission Service Agreements from the Reseller and Assignee, BPA Transmission Services will verify that the signed originals match the documents that were originally sent to the Customers.

      i. If the Assignee's TSR is not Pre-confirmed, BPA Transmission Services will change the status of the TSR to ACCEPTED.

      ii. The Assignee must place the TSR in CONFIRMED status within 15 Calendar Days of the date BPA Transmission Services changes the status of the request to ACCEPTED. When the Assignee CONFIRMS the TSR, the OASIS Transfer is binding.

      iii. If the Assignee fails to CONFIRM the TSR within the specified timeframe, BPA Transmission Services will RETRACT the TSR, and the TSR will receive no further consideration.

      iv. If the Assignee's TSR is Pre-confirmed, BPA Transmission Services will change the status of the TSR to ACCEPTED and the TSR will automatically be given a status of CONFIRMED.

      v. When the TSR is given a status of CONFIRMED, BPA Transmission Services will RECALL or DISPLACE, as appropriate, the Reseller's TSR.

C. Submitting a Reservation Priority (Renewal)

1. Contact the Reservation Desk at 360-418-8499 to Renew a CF6 TSR to request activation of the Yearly Product. IR or GF type TSRs may not be Renewed.

2. Log in to webSmartOASIS.
3. Click Transactions and then click Reservation Summary.

4. Click the Server Filter Options icon to access the Filtering Options.

5. Type the Assign Ref of the TSR to be Renewed into the Ref: field and then click Apply.

6. Click the Assign Ref number to open the Transmission Reservation Detail.

7. Click the New TSR icon to open the New TSR Form.

8. Update the following fields:
   a. Request Type = RENEWAL
   b. Start = Must equal the Stop time of the TSR being Renewed.
   c. MW = Partial MW Renewal requires MW change. Type MW amount to be Renewed. Amount Renewed cannot be greater than original demand.
   d. Related Ref = Parent TSR Related Ref

9. Do not change the Source Sink, POR, POD, Service or Sale Ref fields.

10. Click the Get Price button and click OK in the message window.

11. Click the Enter TSR icon to open the Confirm Entry of TSR Page.
12. Review changes for accuracy and submit or edit as needed.
   a. If changes are correct, click the Submit button
   b. If an edit is needed or an error occurs:
      i. Click the Back icon and correct.
      ii. Click the Enter TSR icon when correction is complete.

D. Viewing Reliability Limits for a TSR

1. To view the Reliability Limits for a TSR, access webSmartOASIS, click Transactions and then click the Reservation Reduction Summary.

   ![Image](image.png)

2. Click the Server Filter Options icon to access the Filtering Options.
   a. Select your Customer code from the Customer drop-down menu.
   b. Select RELIABILITY from the Reduction Type drop-down menu and then click Apply.
   c. Type the TSR Assign Ref into the Ref: field then click Apply.
3. If the TSR to be reviewed is displayed in the Assign Ref column, click the Assign Ref.
4. Click the Assign Ref displayed in the Assign Ref column to display the Reliability Limits.

E. Posting Resale Offerings

1. To post all or a portion of a reservation for sale on webSmartOASIS to the open market (Reseller action):
   a. Log into webSmartOASIS.
b. Click Transactions and then click Reservation Summary.

c. Click the Server Filter Options icon to access the Filtering Options.

d. Type the Assign Ref of the TSR to be resold into the Ref: field and then click Apply.

e. Click the Assign Ref number to open the Transmission Reservation Detail.

f. Click the Post for Resale icon to open the New Transmission Resale Posting Form.

   g. Update the Offer Start Time and Offer Stop Time in the Resale Information section to reflect the Resale offer duration.

h. Click the Offer Increment to change the increment of the Resale offer if applicable.

i. Click the Capacity field in the Offering Profile Information section and type the capacity being resold.

j. To make multiple offerings from a single reservation: click Add Row to add rows and type the information for each of the transmission offerings to be made.
k. Click the Start Time and Stop Time to update the date/time for each segment.
l. Click the Time Zone reflected in the TZ columns and change the Time zone to reflect the appropriate time zone.
m. Verify that all the fields in the Reassignment Information section display the information of the TSR being resold. Update the information if needed to reflect the TSR being resold.

n. Click the Submit icon.
o. Note the Transmission Resale Offering Number that is created.

2. To view the Resale Offering, click ATC/AFC>Transmission Resale Offerings.

   a. Click the Server Filter Options icon to access the Filtering Options.
   b. Type the Transmission Resale Offering Number just created into the Ref: field and then click Apply.

3. To remove the posting for an offering of transmission service (Reseller action):
   a. Access the Transmission Resale Offering Summary screen.
b. Click the Server Filter Options icon to access the Filtering Options.

c. Type the Transmission Resale Offering Number into the Ref: field and then click Apply.

d. Click the Posting Ref number. The Transmission Resale Offering Screen will display.

e. Change the Start and Stop times in the Times/Price section to a date/time prior to the current date.

f. Click the Enter TSR icon.

4. To make an offer on a posting:

a. Log into webSmartOASIS.

b. Click ATC/AFC>Transmission Resale Offerings

c. Identify a transmission sale offering of interest and click the Posting Ref number displayed in the Posting Ref field to display the complete offer profile.

d. To make an offer on that posting, click the Create TSR icon.

e. Type your BPAT contract number in the Sale Ref field.

f. Click Get Price to display the Bid Price and then click ok.

g. To purchase a portion of the transmission offering, modify the dates/times to reflect the dates/time of the portion to be purchased.

h. To submit the TSR Preconfirmed, click the Preconfirmed checkbox.

i. For a short-term Resale, the Assignee must select the same POR and POD as the Reseller's Transmission Resale Offering from the drop-down menu of the POR and POD fields.
j. For a long-term Resale Offering, the Assignee will need to obtain the same Source and the Sink as the Reseller’s Transmission Resale Offering from the Reseller and enter that in the Source and Sink fields.

k. Click the Enter TSR icon .

l. Verify that the information contained on the screen describes the desired purchase.

m. Click the Confirm TSR icon .

5. To accept an offer on a Resale posting (Reseller action):
   a. Log into webSmartOASIS.
   b. Click Transactions>Reservation Summary.
   c. Click the Server Filter Options icon to access the Filtering Options.
   d. Type the Assign Ref of the TSR into the Ref: field and then click Apply. The TSR will display.
   e. Click the Assign Ref to view the TSR details.
   f. Click the ACCEPTED icon.
   g. A dialog box will display asking "Are you sure you want to do this operation? You will not be able to undo this operation."
   h. Click OK. The Reservation Summary screen will display showing the status of the TSR.
   i. If the TSR was submitted Preconfirmed, the TSR will display in CONFIRMED status.
   j. If the TSR was not submitted Preconfirmed, click the Assign Ref of the TSR to display the TSR information.
   k. Click the CONFIRMED icon.

F. Aggregating Resales (Resale to Self)
   1. Log into webSmartOASIS.
   2. Click Transactions.
   3. Click the Server Filter Options icon to access the Filtering Options.
   4. Type the Assign Ref of the TSR to Resale into the Ref: field and then click Apply. The TSR will display.
5. Click the TransAssign icon.

6. In the TSR Information section:
   a. Verify that the Seller and Customer are the same.
   b. Click the Status drop-down arrow to change the Status of the TSR to CONFIRMED.
   c. Click the Request Type to change the Request Type to RESALE.

7. In the Reservation Profile section, change the Start Time and Stop Time to reflect the desired duration for the Resale TSR being created.

8. Click the Add/Edit Reassign icon. The Reassigned Transmission Reservation Profile window will display.

9. Click into the field under the Reassign Ref heading and choose a TSR to reassign.

10. Click into the field under the Reassigned Capacity heading and type the desired MW to Resale. Capacity entered must not exceed capacity of the TSR referenced in the Reassigned Ref field.

11. Change the Reassigned Start Time and Reassigned Stop Time to reflect the desired duration.

12. Verify that the Reassigned Start TZ and the Reassigned Stop TZ display the appropriate time zone. Change the time zone if needed.

13. To Reassign additional TSRs, click one of the Add a Row icons (the first icon adds a row above the first TSR entered; the second icon adds a row below the first TSR entered).
14. Repeat steps 10 through 12 to include additional Reassigned TSRs.

15. Click the Submit icon.

16. To add the Reassignment to the new Resale TSR, click OK.

17. The Reassigned TSR(s) will display in the Reassigned Transmission Reservation Profile section of the new Resale TSR.

18. Verify that the MW displayed in the MW field of the Resale TSR match the total capacity obtained from the Reassigned TSRs. Update the MW field if needed.

19. Click the Enter TSR icon.

20. Click the Confirm TSR icon.

21. The Resale TSR Assign Ref will display. Click OK.

**G. TransAssigning a TSR (Resale)**

1. To post the sale of all or a portion of a reservation to a pre-selected buyer (Reseller action): Access webSmartOASIS
2. **Click Transactions and then click Reservation Summary.**

3. **Click the Server Filter Options icon** to access the Filtering Options.

4. **Type the Assign Ref of the TSR to be resold into the Ref: field and then click Apply.**

5. **Click the Assign Ref number to open the TSR Information screen.**

6. **Click the TransAssign icon**. The New TSR screen containing the reservation information for the selected AREF will display. (Note there are several ways to process through the steps of a TransAssign on OASIS. The steps below describe only one way to do it.)

7. **In the TSR Information section:**
   a. **Click the Customer drop-down menu and select the 4 character NERC code of the Assignee.**
   b. **Verify that the Request Type is RESALE.**
   c. **Verify that the Status is CONFIRMED.**
   d. **For a short-term Resale, verify that the POR and POD match the reservation that is being TransAssigned.**
   e. **For a long-term Resale, verify that the Source and Sink match the reservation that is being TransAssigned.**
   f. **Unless the Assignee needs to select CONFIRMED status for the assigned reservation, check the Pre-confirmed box and change the Status to CONFIRMED.**

8. **In the Reservation Profile section:**
a. Modify the start and stop dates/times to reflect the term of the reservation to be assigned. No modification to these dates/times is needed to assign the entire reservation.

b. Modify the MW field to reflect the MWs of the reservation to be assigned. No modification to the MWs is needed to assign the entire reservation.

c. Modify the Bid Price (in $/MW-HOUR RESERVED) if needed.

9. In the References/Comments/Notifications section:

a. Click the drop-down menu for the Sale Ref and choose the 5-digit point-to-point transmission service contract number assigned by BPA.

b. If the TransAssign reservation is ANNULLED or DISPLACED, the Reseller’s contract number will be re-linked to the assigned capacity.

10. Click the Add/Edit Reassign icon. The Reassigned Transmission Reservation Profile window will display.

11. Click into the field under the Reassign Ref heading and choose a TSR to reassign.

12. Click the Submit icon.

13. To add the Reassignment to the new Resale TSR, click OK.

14. The ReAssigned TSR(s) will display in the ReAssigned Transmission Reservation Profile section of the new Resale TSR.

15. Verify that the MW displayed in the MW field of the Resale TSR match the total capacity obtained from the Reassigned. Update the MW field if needed.

16. Click the Enter TSR icon.

17. Click the Confirm TSR icon.

18. The Resale TSR Assign Ref will display. Click OK.

H. Submitting a Long-Term Firm (LTF) Point-to-Point (PTP) Transmission Service Request (TSR)

1. Log into webSmartOASIS.

2. Click Transactions and then click Reservation Summary.

3. Click the New TSR icon. The New TSR screen will display.

4. In the TSR Information section:
a. Click the drop-down menu of the Service field to choose the service type.
b. Click the drop-down menu of the Request Type field to choose the request type.
   i. To submit a new TSR, a LTF Transfer TSR, or a Conformance TSR choose ORIGINAL.
   ii. To renew existing service choose RENEWAL.
   iii. To delay the start of existing Confirmed service choose DEFERRAL.
   iv. To change the path(s) of existing Confirmed service choose REDIRECT.
c. Click the drop-down menu of the SOURCE and SINK fields to choose the SOURCE and SINK.
d. Click the drop-down menu of the POR and POD fields to choose the POR and POD.
e. Click Preconfirmed (optional unless you are submitting a Conformance or Competition TSR).
f. Leave the Path drop-down field blank.

5. In the Reservation Profile section:
   a. Type the Start and Stop Time for the TSR
   b. Change the Start/Stop Time to display 00.
   c. Verify the time zone is correct.

6. Type the desired MW for the TSR in MW field.

7. Click the Get Price button; the price will automatically populate.

8. In the References/Comments/Notifications section:
   a. Click the drop-down Sale Ref menu to choose your 5-digit contract number.
   b. If you are submitting a Conformance, LTF Transfer, or a Competition TSR, type the Assign Ref of the Parent TSR into the Deal Ref field.
   c. If you are submitting a RENEWAL, DEFERRAL, or REDIRECT TSR, type the Assign Ref of the Parent TSR into the Related Ref field.
   d. To receive status notifications concerning your TSR, type your email address into the Status Notification field.
   e. For Transfer TSRS, type the message, “Related to a Transfer,” into the Comment field.

9. Click the Enter TSR icon .

10. Verify the information displayed is correct.
   a. To make corrections, click the Back icon to return to the New TSR screen.
   b. Make the changes, and click the Enter TSR icon .

11. Click the Confirm TSR icon .

12. To save the TSR, click OK.
I. Confirming a Counteroffer

1. Log into webSmartOASIS.
2. Click Transactions>Reservation Summary.
3. Click the Server Filter Options icon to access the Filtering Options.
4. Type the Assign Ref of the counteroffered TSR into the Ref: field and then click Apply. The TSR will display.
5. Click the TSR’s Assign Ref.
6. Click the CONFIRM icon . The Customer TSR Update screen will display.
7. Click the New Status drop-down menu to change the status to CONFIRMED.
8. In the Reservation Profile section, click the value in the MW Req column and change it to match the value in the MW Grant column.
9. Click the Submit Changes icon and then click OK.
10. Click OK to Save the Changes and Confirm the Counteroffer.
J. Submitting a Redirect

1. Log into webSmartOASIS.

2. Click Transactions>Reservation Summary.

3. Click the Server Filter Options icon to access the Filtering Options.

4. Type the Assign Ref of the TSR to be redirected into the Ref: field and then click Apply. The TSR will display.

5. Click the TSR’s Assign Ref.

6. Click the Redirect icon to display the New TSR screen.

7. In the TSR Information section:
   a. Verify that the Customer Code of the Parent Reservation matches the Customer Code displaying in the Customer field.
   b. Change the Service Type to reflect the service type of the Redirect TSR. A Redirect TSR may be in any increment of Firm Point-to-Point (PTP) service.
c. Verify that the Request Type is REDIRECT.
d. If the TSR is a Short-Term or Hourly Redirect request, the Preconfirmed checkbox must be checked. Long-Term Redirect requests do not need to be Preconfirmed.
e. If the TSR is a Long-Term Redirect request, a SOURCE and SINK are required. Short-Term or Hourly Redirect requests do not require a SOURCE or SINK. Change the SOURCE and/or SINK if appropriate.
f. Change the POR and/or the POD to the desired point(s) for the Redirect request.

8. In the Reservation Profile section:
   a. Change the Start Time and Stop Time to reflect the duration of the Redirect request. The Stop Time of the Redirect request must not exceed the Stop Time of the Parent TSR.
      i. A Customer must request Long-Term Redirects in yearly increments (12 calendar month) unless the Long-Term Request terminates on the same date as the Parent Reservation (i.e., the Long-Term Redirect Request is for the balance of the Parent Reservation).
      ii. If the Redirect Request terminates on the same date and time as the Parent Reservation (i.e., the Redirect is for the balance of the Service Agreement), the reservation priority will be moved from the Parent Reservation to the Redirect Request, provided that there is sufficient Available Transfer Capability (ATC) and/or de minimis dead-band capacity on the redirect path.
      iii. For Redirect Requests with a term of one year or longer, the Customer must submit a Long-Term Redirect Request.
      iv. For Redirect Requests with a term of less than one year, the Customer must submit a Short-Term Redirect Request with the TSR type designated as "LTF-YEARLY PTP."
      v. BPA Transmission Services will process all such Redirect Requests in the same manner as all other Long-Term Firm TSRs.
   b. Enter the capacity to Redirect into the MW field. Capacity must not exceed the capacity of the Parent TSR.
   c. Click Get Price to populate the Bid Price field or manually enter the appropriate Bid Price.
   d. If the TSR is an Hourly request, the capacity may be profiled. Click the 24 Hr icon to display a 24 hour profile or the H icon to display an hourly profile for the TSR.
      i. In the Start Time column, click the Start Time displayed and type the desired Start Time.
      ii. In the Stop Time column, click the Stop Time displayed and type the desired Stop Time.
      iii. In the MW column, click the MW displayed and type the desired MW.
      iv. Repeat this process for each hour.
v. To delete a row, click the row to delete and then click the Delete Selected Row icon ✖️.

vi. To add a row, click the row above the row you want to add and then click the Add Row icon 📝.

9. In the Reference/Comments/Notifications section:
   a. Verify that the Related Ref displayed in the Related Ref field is correct.
   b. Click the Sale Ref field and choose your five-digit contract code.
   c. To receive TSR status notifications, type your email address into the field next to the Status Notification field.

10. Click the Enter TSR icon ✅. The Confirm Entry of TSR screen will display.

11. Verify that all of the parameters for the redirected portion of the Parent Reservation are correct.

12. Click the Confirm TSR icon ✅. If all necessary fields have been filled, a dialog box will display the message, "TSR Number XXX has been entered" and the Redirect Request will be given an OASIS status of QUEUED.

13. This TSR number will be the AREF assigned to the Child portion of the Parent Reservation.

14. To save the TSR, click OK.