BONNEVILLE
POWER ADMINISTRATION

Transmission Business Line (TBL)

Scheduling Automation Bulletin SAB002

General Overview of Transmission Transactions with TBL In a WECC RMS-Compliant Environment

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Comments may be sent to etag@bpa.gov

In our continuing effort to ensure compliance with Western Electricity Coordinating Council's (WECC) Reliability Management System (RMS) Section M.2.b.4 and M.2.b.5, and avoid sanctions that take effect in January 2005, the TBL is focusing on scheduling automation activities to ensure that all scheduled transactions with our control area are represented by E-Tag(s). This Scheduling Automation Bulletin defines a number of changes that TBL will be making to support the goal of assuring that all E-Tags and schedules balance prior to the completion of checkout in Preschedule and Real Time.

The purpose of this Bulletin is to help prepare your organization for TBL's implementation starting in November 2004 and continuing into January 2005 and beyond. We will keep you informed about TBL's processes through bi-weekly customer conference calls, forums, and periodic postings through January 2005. All customers are invited to raise questions, clarify procedures, and offer feedback throughout the months leading to January 2005 on the bi-weekly calls, through etag@bpa.gov, or through your transmission account executive. This ongoing communication is intended as an enhanced process to obtain your input as an alternative to the 15-day comment period that is used in TBL's Business Practice development. At the conclusion of TBL's first phase of implementation, in January 2005, a Business Practice capturing all of the final adopted changes will be posted.

Transmission Business Line (TBL)

1. TBL Requires Submittal of Both an E-Tag and a Schedule

- TBL will continue to require submittals of both E-Tags and schedules.
- Timelines for schedule submissions will not change (See the Reservation and Scheduling Business Practice for details).
- E-Tag submittal must be consistent with North American Electric Reliability Council (NERC) Policy 3 requirements, including but not limited to NERC timelines and required data elements.
- Customers must still have RODS accounts to schedule in accordance with TBL's Schedule Procedure "Establish an Account Prior to Scheduling" dated October 8, 2003.
- TBL transmission rights usage will be based on the RODS schedule that you call in, not on the E-Tag.

2. Implementing E-Tags and Schedules: Matching and Balancing

Effective November 9, 2004 TBL will begin the implementation of matching and balancing (see below). Between November 9, 2004 and December 6, 2004 TBL will work with you to assure that your organization receives all necessary feedback regarding the changes required to resolve tag and schedule discrepancies. On December 6, 2004, if the TCH and the PSE are unable to resolve the problem after the 5/15 minutes (Real Time/Preschedule) resolution window, TBL will take the necessary corrective action of either curtailing the E-Tag or reducing the schedule (whichever is higher). TBL will begin taking corrective action during checkout troubleshooting when there is a discrepancy between the E-Tag and the schedule.

The WECC RMS Agreement requires:

- The Load Control Area (LCA) to implement a schedule for an approved E-Tag.
- The LCA to deny a schedule without an approved E-Tag.

- With the exception of some dynamic schedules, this means that TBL must ensure that all schedules have an E-Tag(s) and all E-Tags have a schedule(s). It also means that the profiles on a RODS schedule and the corresponding sum of the energy profile(s) on matched E-Tags must be identical.
- Ensure that every E-Tag has an associated RODS account(s). Without a RODS account, there cannot be a schedule. We refer to this process of ensuring that a RODS account exists for an E-Tag as **"matching"**. All relevant BPAT information on the E-Tag must match exactly with the properties of the RODS account. This includes the basic eight items of information as identified in TBL's Scheduling Procedure "Establish an Account Prior to Scheduling", dated October 8, 2003. Among the relevant items are Path validation, Network TCH, Intertie TCH, Contract Type, Network Product Code, and Intertie Product Code.

- Given a valid account(s) for an E-Tag, TBL will then compare the profile in the RODS schedule to energy profile(s) from the sum of the associated E-Tags to ensure that they are the same. We refer to this process as **"balancing"**.
- During the testing and education period starting on November 9, 2004 TBL will begin providing verbal feedback to customers when tags don't match or balance. The focus during this period will be to help you understand how to resolve a problem with matching or balancing as well as what corrective actions TBL will take when matching and balancing are fully implemented if the Transmission Contract Holder (TCH) and the Purchasing/Selling Entity (PSE) do not resolve the problem on December 6, 2004.
- If there is no matching RODS account and one cannot be built prior to checkout (not possible for Real-Time transactions), the E-Tag will be denied. This is consistent with current scheduling practices, as you cannot schedule without a RODS account.
- If the energy profile on the E-Tag does not balance with the independently submitted schedule(s) (i.e., if the sum of the hourly profiles of the associated E-Tag doesn't match the hourly values in the RODS schedule), one of the following must occur:

  a) the E-Tag author can adjust the E-Tag(s) to be consistent with the schedule or

  b) the TCH can revise the schedule to be consistent with the E-Tag(s) or

  c) the E-Tag author can withdraw the E-Tag(s) and issue a new one and/or the TCH can withdraw the schedule and submit a new one.

  Again, between November 9, 2004 and December 6, 2004, if no corrective action is taken by the PSE or the TCH to adjust either the E-Tag or the schedule to match the other, TBL will communicate that failure but will not take corrective action. Beginning on December 6, if the energy profiles on the E-Tag and the schedule differ at checkout, TBL will notify you of the problem and work through the resolution with you. If the problem cannot be resolved after allowing the TCH 5/15 minutes (Real Time/Preschedule) to resolve the problem, TBL will take the necessary corrective action of either curtailing the E-Tag or reducing the schedule (whichever is higher).

  Starting on December 6, if the E-Tag remains out of balance with the schedule at checkout, TBL will work with you to troubleshoot a resolution resulting in either:

  a) denying the E-Tag and cut the schedule if the E-Tag has not yet been implemented or

b) reducing the schedule or curtail the E-Tag (whichever is larger) so that the energy profiles balance using the lower MW numbers.

- When a contingency occurs, the schedule(s) and E-Tag(s) must still balance. TBL expects to implement use of E-Tags for curtailments on January 3, 2005. Additional information on these procedures will be provided at a later date.

It is important to note that when the TCH is not the E-Tag author, the TCH must review the E-Tag and work with the author to get any errors corrected.

3. Unique E-Tag Authorship Requirements

- E-Tags for losses, hourly market transactions, PF block power, reserve services, and station service transmission must have unique suffixes (-LX, -HM, -PF, -SR, -NR, -6X) appended to the OASIS assignment reference (ARef) or TBL enabling contract short number referenced on the OASIS/Contract Number field, to uniquely identify the intent of the transaction. (See "Required E-Tagging Suffix Codes, Version 1), dated September 10, 2004). TBL will provide verbal feedback regarding any problems with your tag submittals starting on November 9, 2004 with respect to suffixes. On December 6, 2004 a tag that fails this tag validation will be denied.
- Dynamic schedules on the AC or the 3rd AC Interties must have E-Tags since they are WECC qualified paths. To properly process this transaction, you need to select the dynamic schedule E-Tag type and indicate the maximum transmission value in the transmission profile. Dynamic schedules that require E-Tags and do not have them will be denied from November 9, 2004 onward.

4. Schedule and E-Tag Processing in Preschedule

TBL still requires schedule submittals in accordance with the timelines in the Reservations and Scheduling Business Practice. E-Tag submittals must follow NERC timelines. E-Tag processing procedures are defined below. These procedures will be put in place with customers for testing and education on November 9, 2004 and for full implementation on December 6, 2004.

- The TBL scheduling window for Pre-Schedule processing of E-Tags will be 0800 – 1800 Monday through Friday and 1300 – 1600 on weekends and holidays. If an E-Tag for a Pre-Schedule transaction is sent prior to opening of the Pre-Schedule window, the E-Tag will be processed by Real Time.
- If a schedule is submitted without a corresponding E-Tag, and that situation persists at checkout, and is not resolved by the TCH after notification by the TBL Prescheduler (consistent with the 15 minutes allowed for resolution of a problem currently in Section L. of the Reservation and Scheduling Business Practice), TBL will deny the schedule.

- If the energy profile on the E-Tag and RODS schedule don't balance at checkout (generally at 1600 hours) and the imbalance is not resolved by the E-Tag author and/or TCH (again, consistent with the 15 minutes allowed for resolution of a problem currently in Section L. of the Reservations and Scheduling Business Practice), TBL will reduce the schedule or curtail the E-Tag (whichever is higher) so that the energy profiles balance.
- TBL will accept and actively process E-Tags 24 hours/day.

5. Schedule and E-Tag Processing in Real Time

TBL still requires schedule submittals to be done in accordance with the timelines in the Reservations & Scheduling Business Practice. E-Tag submittals must follow NERC timelines. These procedures will be put in place with customers for testing and education on November 9, 2004 and for full implementation on December 6, 2004.

- TBL will accept E-Tags for Real Time transactions beginning at 1800 for the next scheduling day.
- Events on Real Time must follow a strict sequence. TBL Real Time will not accept E-Tags or RODS schedules out of the sequence described below:
  1) TCH requests the RODS account that will accommodate the transaction to be built (prior to Real Time)
  2) The PSE submits the E-Tag to Real Time
  3) TCH submits the RODS schedule to Real Time.
- TBL Real Time will deny all E-Tags that do not have a corresponding RODS account, since there is not sufficient time available to build accounts in Real Time.
- If there is a discrepancy between the E-Tag(s) and the schedule, TBL Real Time will allow a 5-minute revision window starting at the time of telephone notification by the TBL Real Time Scheduler to the TCH for the TCH and the PSE to resolve the discrepancy. If the discrepancy cannot be resolved within 5 minutes after TBL calls the TCH to communicate the discrepancy, TBL will reduce the schedule or curtail the E-Tag(s) (whichever is higher) so that the energy profile on the E-Tag(s) and schedule balance.

6. Curtailments

When a contingency occurs, TBL must maintain the balance between E-Tag and schedule. If the contingency requires reduction of schedules, the curtailment will be applied to both the E-Tag(s) and the schedules. Between November 9, 2004 and January 3, 2005 TBL will not implement balancing tags and schedules during a curtailment (although testing will occur) and E-Tag notification of a curtailment will not be guaranteed. All curtailments will receive notification via phone. TBL plans to incorporate E-Tag procedures in curtailment processes starting on January 3, 2005.

- Both E-Tags and schedules will be reduced in curtailment and subsequently reloaded when the curtailment ends.
- TBL will communicate the curtailment via E-Tag rather than phone.

7. Cutover Dates

- TBL will cutover its Tag Authority and Approval responsibilities to OATI on November 9, 2004. TBL schedulers will attempt to create balance between the E-Tag and the schedule by working with the TCH and affected Adjacent Control Area staff. The period between November 9, 2004 and December 6, 2004 can be viewed as a “dry run” for attaining balance between the energy profile on the E-Tag and the RODS schedule prior to “going live” on December 6, 2004.
- On December 6, 2004, TBL will:
    - Compare the energy profile of the E-Tag and the RODS schedule. If the energy profiles on the E-Tag and the schedule differ at checkout, TBL notify your of the problem and will work through resolution with you. If the problem cannot be resolved after calling the TCH allowing 5/15 minutes (Real Time/Preschedule) to resolve the problem, TBL will take the necessary corrective action of either curtailing the E-Tag or reducing the schedule (whichever is higher). TBL will also begin using E-Tags in the checkout process (for an extra measure of assurance that the E-Tag and Schedule are in sync) on December 6, 2004.
    - TBL plans to begin using E-Tags in our curtailment processes on January 3, 2005.