Transmission Business Line Business Practice Technical Forum II

February 7, 2003

Today's Agenda

- Technical Forum Background & Review
  - Review of Norms & Principles
  - Review of Forum & Work Group Structure
  - Clarification of Issue Resolution Process
- Work Group Report Outs
- TBL Systems Update
- Wrap-up
  - Next Steps
  - Feedback

Technical Forum: Principles

- Adherence to Attachment 5 of the 2004 Settlement Agreement
- *Ex Parte* is in effect
- Customer's opportunity to be heard
- TBL will manage & facilitate Forums
- Customers will help shape the Forum's structure

Technical Forum: Norms

- Technical Forums will foster open COMMUNICATION and COLLABORATION
- Technical Forums will be well-documented to ensure ACCURACY and FOCUS
- Participants shall involve appropriate TECHNICAL PERSONNEL

Work Group Web Sites

BPA-Transmission Business Line | Business | Business Practices Technical Forum - Microsoft Internet Explorer provided by BPA 08

Back | Address ission.bpa.gov/Business/techforum/WorkGroups/OperatingReserves.cfm | Go | File

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Operating Reserves Work Group

At the Kick-Off we were able to determine the following list of issues for consideration within the Operating Reserves Work Group:

- 150 MW floor on self-supply
- One supplier per transmission customer
- Allowing generators to self-supply
- Rules for arranging for interruptible exports
- Ability to choose split between spinning and supplemental reserve
- In hour schedule changes for those that self-supply
- Selling firm power over non-firm (NF) transmission requires Op Reserves
- For L-shaped schedules/charges capture rules in Business Practices

The TBL co-chair for the Operating Reserves Work Group will be Dave Gilman. The customer co-chair will be determined at the initial Work Group meeting.

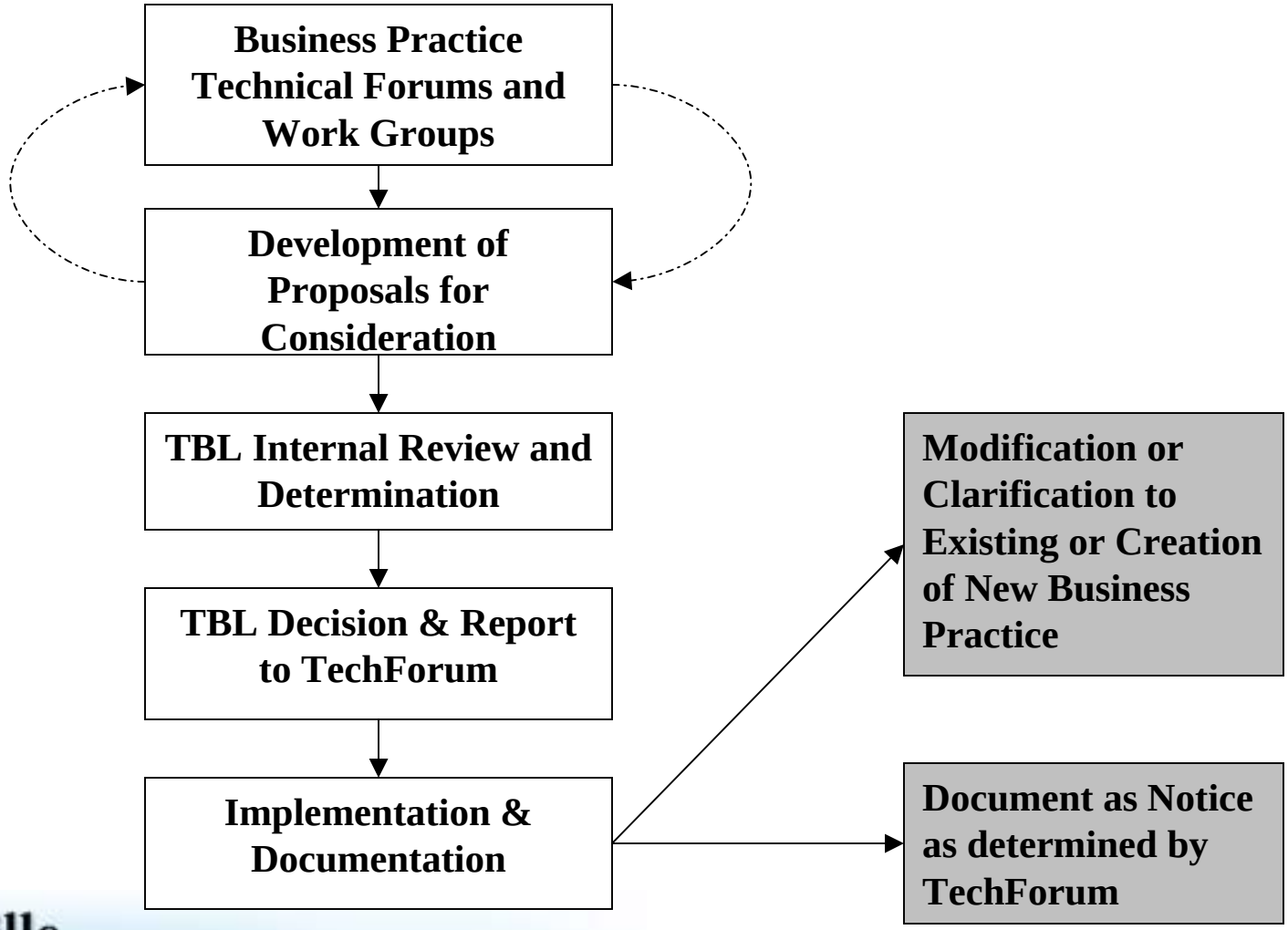
Working Group Documentation

- Operating Reserves Work Group Minutes 01/28/03 (75k PDF) 2/5/03
- Operating Reserves Work Group Jan. 28, 2003 Agenda (43k PDF) 1/28/03
- Operating Reserves Issues: further description of issues raised at rate case and at the Dec. 11, 2002 Technical Forum (20k PDF) 1/28/03
- Generic Rules: Rules used to determine Operating Reserves charges based on transmission schedules (32k PDF) 1/28/03

THE SECOND OPERATING RESERVES WORK GROUP MEETING WILL BE HELD THURSDAY, FEBRUARY 6, 2003 FROM 1 PM TO 5 PM AT PARKWAY PLAZA, ROOM 40, VANCOUVER, WASHINGTON.

To access the phone bridge dial (503) 230-5566, wait for double beep then enter 1155# BPA participants calling from Headquarters or Ross Complex dial x5566, then 1155#.

Workflow for Decision Making



Scheduling Practices Work Group Report Out (1-5)

ISSUES	WORK GROUP REPORT & RECOMMENDATIONS	FORUM DISCUSSION & RECS	STATUS / NEXT STEPS	COMMENTS
Passive approval of tags and accepted schedule of tag is not accepted by TBL	The sponsor of this issue was not present and the rest of the group did not understand or have that problem.			
Intermediate transfer party included in tag should have say so/deny tag	This issue is not under BPA's purview as it is a NERC policy. The comment will be taken to WECC by TBL to see if a BP can be created for the western systems.			
TBL elimination of "inactive" accounts is a problem	Before an account is deleted TBL will contact the TCH & any entity associated to get approval.			
OASIS doesn't reflect long-term commitments	TBL did not have enough background to address this topic. They indicated they would look into this, balance resource commitments and report back to the group.			
Contract demand limits between TBL and transmission customer	If demand limits were automated in our scheduling system then UIC's would not be prevalent. When a tag is a schedule request this automation will be in place, and would not allow a schedule if there were no transmission. Further work needed.			

Scheduling Practices Work Group Report Out (6-10)

ISSUES	WORK GROUP REPORT & RECOMMENDATIONS	FORUM DISCUSSION & RECS	STATUS / NEXT STEPS	COMMENTS
Reconciliation process behind billings	Customers recognized TBL's plight & offered their assistance, recognizing that it simply needed to be gone through and completed.			
Concern on system changes	A number of issues were discussed; NERC timelines, SW timelines, Seams issues, Buying all transmission on OASIS. Further discussions to take place on these items.			
Account building after hours	Customers want 24/7 account building. TBL committed to Sat & Sun account building w/24/7 by October.			
Internal constrained paths	John Anasis gave a presentation on the current and possible future constrained paths and how they effect the available transmission.			
CASIO supplemental market schedule	This will have to be done with dynamic schedules and there are current postings out on this topic. More discussions will be held.			

Real Power Losses Work Group Report Out

ISSUES	WORK GROUP REPORT & RECOMMENDATIONS	FORUM DISCUSSION & RECS	STATUS / NEXT STEPS	COMMENTS
For Transmission Contract Holders for BPA PBL purchases with losses bundled in the price, the ability to have a loss provider other than the PBL for other transmission contracts.	The group concluded this is not an issue as purchases from BPA/PBL allow the customer the choice to take either a "delivered" product or a "raw" product. If they choose delivered the losses are included (bundled) and PBL is the TCH, if they choose raw losses are not included and they have the option as to who is the TCH.			
Concurrent and/or financial losses	A white paper was put together to further discuss the issues of concurrent losses and how it would be used for all customers, not just PBL.			
Frequency customers may change loss providers	Topics 3&4 were discussed together & BPA explained the current limitations that the RODs system imposes. The group is recommending more flexibility to the process and realizes			
Possibility of designating loss providers by schedule (E-tag)	that this may not happen until the new automation is brought on line. We are documenting our needs to be included in that automation now.			
Reconciliation of losses	The group suggested that TBL develop a "due process" to deal with minor issues. TBL will explore the concept and document in a Biz Practice			

Operating Reserves Work Group Report Out (1-4)

ISSUES	WORK GROUP REPORT & RECOMMENDATIONS	FORUM DISCUSSION & RECS	STATUS / NEXT STEPS	COMMENTS
150 MW floor on self supply	A customer group has been formed to work on a proposal. The customers would like this requirement to be less restrictive. There was discussion of the idea that the region should work towards a competitive market for OR. TBL should consider this its rate design for the next rate period.			
One supplier per transmission customer	Items 2, 3, & 4 were combined into a single item of additional flexibility to supply OR. Included is the election period (can change more often than annually). The customers have formed a group to work on a proposal. It was noted that those who benefit should cover the cost of implementing changes.			
Allowing generators to self-supply	Combined with 2.			
Rules for arranging for interruptible exports	Combined with 2.			

Operating Reserves Work Group Report Out (5-8)

ISSUES	WORK GROUP REPORT & RECOMMENDATIONS	FORUM DISCUSSION & RECS	STATUS / NEXT STEPS	COMMENTS
Ability to choose split between spinning and supplemental reserve	The difference between types of reserves was discussed. TBL explained that current practice is to use spinning reserves first. Allowing only supplemental reserves to be sued would require change. Further clarification is needed.			
In hour schedule changes for those that self-supply	Agreement that this not an issue for this work group.			
Selling firm power over non-firm transmission requires operating reserves	Agreement that this issue should be deferred to the WECC group working on seams issues.			
For L-shaped schedules/ charges, capture rules in Business Practices	TBL provided a list of generic rules for determining OR charges. These rules were designed to avoid double charging for L-shaped schedules. Customers agreed that this works for most cases, but there are some special cases that are not correct. The customers will provide an example. It was agreed that this was a lower priority than items 1 and 2.			

Curtailment Work Group Report Out

ISSUES	WORK GROUP REPORT & RECOMMENDATIONS	FORUM DISCUSSION & RECS	STATUS / NEXT STEPS	COMMENTS
Curtailment in real-time based on reservations vs. schedules	TBL has presented to the work group its current mid-hour curtailment methodology based upon schedules and also presented a possible method based upon reservations. SCL has also submitted an alternate method based on schedules. Most work group participants have indicated a preference for the reservation-based method. One has voiced their preference for the current schedule-based method. TBL has provided the work group with a preliminary estimate of the cost and time required to change over to the reservation-based method. TBL estimates that the change would cost between $150,000 and $200,000 and take about 12 weeks to implement.			
Documentation of curtailment procedures (CAISO, TBL) and minimize seams/differences.	TBL gave a presentation on its new procedures with the CAISO for mid-hour emergencies involving the AC Intertie or the private NOB portion of the DC Intertie. The procedure relies on the use of counter-schedules between the BPA and CAISO control areas in order to avoid the need for mid-hour schedule cuts. This procedure is posted on BPA's OASIS. TBL hopes to develop similar arrangements with BC Hydro for the Northern Intertie and with LADWP for LA's share of the DC Intertie.			
Timeline of Biz Practices or issues that other entities (WECC, ISAS) are developing	The work group decided to postpone any discussion of this item until a later date. It was felt that there was nothing for the work group to address until WECC's ISAS committee finished their work.			

Wind Work Group Report Out

ISSUES	WORK GROUP REPORT & RECOMMENDATIONS	FORUM DISCUSSION & RECS	STATUS / NEXT STEPS	COMMENTS
Wind/intermittent generation scheduling				
Alternatives for scheduling				
FERC proposal wind generator tied to forecast schedule and settled monthly aggregated amount				

Transmission Business Line Systems Update

Dennis Stevens

TBL Systems Overview

- Recent and future stages of implementation and integration
  - Recent past: November 2002 to January 2003
  - Current plans: Now to October 1, 2003
  - Future plans: Post October 1, 2003
- Budget constraints limit future activity but not future planning

Recent TBL Systems Activity

- Recent system roll-outs
  - Ancillary services
  - Billing systems
- Recent system integrations
  - Integration of Ancillary & Billing

Current and Short-Term Systems Overview

- Planned system roll-outs
  - eTag (ETMS) – by Oct. 1, all schedules are tags
    - Hourly products as a schedule by end of March
    - Remainder of products by mid-summer
  - Short term firm redirects
- Planned system updates
  - Energy imbalance (Ancillary)
  - Generation imbalance (Ancillary)
  - Rate changes (Billing)

Post October 1, 2003

- New functionalities to be considered
  - Proposals from Technical Forum
- Additional updates & roll-outs to be considered
- Customer priorities are TBL priorities

Wrap-up

- Next Steps
  - Any proposals on the table?
  - Any additional issues to be added?
  - Status of Work Groups?
  - Forum III Agenda, Time & Location
- Feedback