**1. RECOMMENDED ACTION: EFFECT OF EC VOTE TO ACCEPT RECOMMENDED ACTION:**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Accept as requested |  | Change to Existing Practice |
| X | Accept as modified below |  | Status Quo |
|  | Decline |  |  |

**2. TYPE OF DEVELOPMENT/MAINTENANCE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Per Request:** | | **Per Recommendation:** | |
|  | Initiation |  | Initiation |
| X | Modification | X | Modification |
|  | Interpretation |  | Interpretation |
|  | Withdrawal |  | Withdrawal |
|  |  |  |  |
|  | Principle |  | Principle |
|  | Definition |  | Definition |
| X | Business Practice Standard | X | Business Practice Standard |
|  | Document |  | Document |
|  | Data Element |  | Data Element |
|  | Code Value |  | Code Value |
|  | X12 Implementation Guide |  | X12 Implementation Guide |
|  | Business Process Documentation |  | Business Process Documentation |

**3. RECOMMENDATION**

**SUMMARY:**

Annual Plan Item 3.f. Evaluate and develop a common industry data specification to support automated Net Scheduled Interchange (NSI) Checkout, was submitted to create a common approach to automating NSI checkout. These modifications provide guidance for Balancing Authorities to utilize for their implementations.

**Recommended Standards:**

The CISS is proposing adding an appendix to WEQ-004 Coordinate Interchange Business Practice Standards to provide guidance to entities in the Eastern Interconnection to describe best practices regarding automating interchange checkout.

WEQ-004-APPENDIX – X: Guidelines for Electronic NSI Checkout Systems

This appendix describes an optional set of guidelines for any BA that chooses to automate NSI checkout with an adjacent BA using an electronic data exchange service with their counterpart.

Automation of the NSI checkout does not relieve the BA of any NERC requirements associated with the checkout process.

Adjacent BAs should ensure their up-to-date NSI data has been received by the counterparty.

Adjacent BAs should agree upon alarm mechanisms that would trigger backup procedures for manual NSI checkouts.

Any discrepancies in magnitude of interchange shall be resolved via mutual agreement between the two BAs.

Potential functionality to efficiently resolve discrepancies may be accomplished through BAs sharing e-Tags that contribute to NSI with its adjacent BA as a part of NSI automation for the purposes of discrepancy troubleshooting and verification. This exchange may also include daily NSI totals for before-the-fact (BTF) or after-the-fact (ATF) checkout.

**4. SUPPORTING DOCUMENTATION**

1. **Description of Request:**

The proposal indicated development of a data specification that would include all data required to automate the NSI checkout including details to find e-Tag data discrepancies between two BA’s systems providing a mechanism to speed up the checkout process.

Each BA can opt-in to using the standard specification. In-house development will give each BA ability to customize the design and implementation per their dispatcher’s needs. The specification would be able integrate with existing tools utilized by dispatch operators. It gives participating BAs the ability to design a versatile tool that could work with various neighbors.

**b. Description of Recommendation:**

During development, the subcommittee did not garner consensus for a standard data specification, but was able to address the request through guidance for the implementation of such automation. The subcommittee noted that the Western Interconnections use of WITT would not be impacted by the automation efforts for the Eastern Interconnection.

**c. Business Purpose:**

These additional standards will provide guidance to BAs seeking to automate their NSI checkout, which is intended to reduce the manual processes and interactions for entities that are required to comply with NERC Reliability Standard INT-009.

**d. Commentary/Rationale of Subcommittee(s)/Task Force(s):**

The subcommittee met throughout 2020 to deliberate the approach for addressing this request. The meeting minutes are noted in the following meetings:

March 16, 2020 [Final Minutes](https://www.naesb.org/pdf4/weq_ciss031620fm.doc)

May 26, 2020 [Final Minutes](https://www.naesb.org/pdf4/weq_ciss052620fm.doc)

June 28, 2020 [Final Minutes](https://www.naesb.org/pdf4/weq_ciss062220fm.doc)

July 28, 2020 [Final Minutes](https://www.naesb.org/pdf4/weq_ciss072820fm.doc)

August 25, 2020 [Final Minutes](https://www.naesb.org/pdf4/weq_ciss082520fm.doc)