Scope Document 2018 WEQ API 3e

Un-Tagged Pseudo-Ties

* Option 1 -
	1. A new Request Type named **PT** *(for this presentation)* will be established with the following characteristics:
		1. It will be a form of scheduling rights, similar to a Resale in PTP.
		2. It will have the same reservation priority as the Parent reservation.
		3. It must include the unique identifier from the EIR-Registered Pseudo-Tie.
		4. Multiple PT reservations against a Parent reservation but each must have a unique identifier from the EIR-Registered Pseudo-Tie.
		5. It cannot be resold or redirected.
		6. It will only be applied to PTP.
		7. It must have the same reservation characteristics (source, sink, POR, POD, etc.) as the parent reservation.
		8. Capacity may be adjusted over time. If increased, Uncommitted Capacity will be reduced on the parent reservation. If decreased, Uncommitted Capacity will be increased on the parent reservation.
		9. The parent reservation must not be subject to preemption and competition (e.g., for firm service it must be unconditional with respect to section 13.2 of the OATT)
		10. The PT reserved capacity will act as an encumbrance on the parent reservation and, therefore, will reduce Uncommitted Capacity of the parent reservation.
		11. Since the **PT** reservation represents the upper limit of capacity that may be seen on a Pseudo-Tie, none of the PT capacity should be released as non-firm ATC.
	2. This can be used through OASIS template structures.
	3. Pros & Cons of Option 1
		1. Pros
			1. It is managed by the TC
			2. There is a reservation mechanism that can be easily incorporated into the uncommitted capacity calculation
			3. It is flexible and can be raised or lowered
			4. The PT reservation capacity will not be release for non-firm
			5. This will allow for post back of the unused capacity from the parent for non-firm
		2. Cons
			1. The current approach does not allow flexibility
			2. It could lead to cascading modifiers
			3. It could require changes to the OASIS template responses to show the TC of their current profile of the encumbrances.
		3. Complexity
			1. Each adjustment (raise or lower the PT capacity of the reservation) impacts the PT reservation and the parent
	4. Subcommittee Disposition of Option 1
		1. 02/21/18 Subcommittee decided to not include NITS in this discussion
		2. 02/22/18 Subcommittee decided that this option be dropped from consideration and use Option 3
* Option 2 -
	1. Incorporate a recall type mechanism to incumber capacity from the Parent reservation where the Transmission Provider manages the recall. This could be a new reduction type.
		1. This approach will not require establishing a new template.
		2. The TC would not be able to use this mechanism
		3. Incumbered capacity should be modifiable within the bounds of the Parent Reservation.
			1. Could be similar to NITS DNR temporary termination functionality
			2. Could be similar to Redirect on a non-firm basis relinquish functionality
		4. Capacity is not released to the market (retained on the Parent Reservation).
		5. This approach does not have a reservation that can be used for unreserved use calculations.
	2. Pros & Cons of Option 2
		1. Pros
			1. No OASIS required template to be used
			2. Allows for an alternate method that can be easily incorporated into the uncommitted capacity calculation
			3. It is flexible and can be raised or lowered
			4. The incumbered capacity will not be release for non-firm
		2. Cons
			1. This mechanism is TP managed for the TC
			2. Requires the TP to create a mechanism to modify capacity over time
			3. This approach does not have a reservation that can be used for unreserved use calculations
			4. There is no mechanism on OASIS to identify or capture the TC wishes to respect to the PT.
			5. At this point there is no timing requirement to adjust the incumbrance so that the TC can use it for other purposes
			6. General liability for the TP actions
	3. Subcommittee Disposition of Option 2
		1. 02/21/18 Subcommittee decided that this option be dropped from consideration
* Option 3 –
	1. To develop a new method for a Transmission Customer submit an encumbrance of reserved capacity
		1. It will be a form of PTE (Pseudo-Tie Encumbrance) rights (tag) entry
		2. It must include the unique identifier from the EIR-Registered Pseudo-Tie
		3. Multiple PTE against a Parent reservation but each must have a unique identifier from the EIR-Registered Pseudo-Tie
		4. It cannot be resold or redirected
		5. Capacity may be adjusted over time. If increased, Uncommitted Capacity will be reduced on the parent reservation. If decreased, Uncommitted Capacity will be increased on the parent reservation
		6. The parent reservation must not be subject to preemption and competition (e.g., for firm service it must be unconditional with respect to section 13.2 of the OATT)
		7. It will applied to both PTP or NITS.
		8. Since the PTE will be treated comparable to a schedule it will regulate the capacity of the parent to be released as non-firm ATC.
	2. This can be used through OASIS template structures.
	3. Could possibly be used for other purposes to document an intent to use reserved capacity.
	4. This option would also require the Transmission Customer to have the functionality to remove and/or modify the encumbrance.
	5. Have to determine that this will be a TC driven recall through the OASIS template structures
	6. Pros & Cons for Option 3
		1. Pros
			1. Blank piece of paper not limited by the other constructs
			2. Managed by the TC
			3. Accurate calculation of uncommitted capacity of the parent reservation
			4. Can be raised and lowered
			5. This can be used through OASIS template structures
			6. Prevents the release of the encumbrance as non-firm ATC
			7. Allows for TP approval of the encumbrance
			8. It can be equally applied for PTP and NITS in the backend systems
			9. Since the PTE will be treated comparable to a schedule it will regulate the capacity of the parent to be released as non-firm ATC
			10. It could be set up so that adjustments actually replace the existing value for the encumbrance.
			11. Could lay the foundation for adding schedules as a reduction type in OASIS in the future
		2. Cons
			1. This approach may require changes (different type OASIS structures) to backend systems
	7. Subcommittee Disposition of Option 3
		1. 02/21/18 Subcommittee decided to include NITS in this discussion
		2. 02/22/18 Subcommittee decided that this option would be developed/scoped and drop Option 1
* General Information –
1. Consider establishing a mechanism for capturing near-real time impacts of Pseudo-Ties on transmission element loading in order to ensure reasonably accurate load relief assignments in curtailments.
2. 2018 WEQ Annual Plan Item 3g sub-bullet 4 - Expand SAMTS to permit Coordinated Requests to be reduced or terminated by the Transmission Customer if the Coordinated Group includes a reservation that is denied registration in a Pseudo-Tie in webRegistry.
	* 1. Require only reservations to be included in the registration of the Pseudo-Tie in the webRegistry. This addresses the SAMTS portion of the annual plan item.
3. Should the standard be set up as mandatory for all un-Tagged Pseudo-Ties or should it allow for the TP to set up at its own discretion for the use of un-Tagged Pseudo-Ties?
4. Should the standard be set up for Tagged and un-Tagged Pseudo-Ties?