

# ~~Scheduling Agent~~Scheduling Agent Change

## **BPA Transmission Business Practice**

Version 45

~~5/4/2021~~9/11/2024

# Scheduling Agent Change

## Version 45

This business practice ~~describes~~ defines the roles and responsibilities of the Customer and Scheduling Agent and the process for Customers to follow to designate a to change an existing Scheduling Agent designation.

For more information, visit the [BPA Transmission Business Practices webpage](#) or submit questions to [techforum@bpa.gov](mailto:techforum@bpa.gov).

## Table of Contents

A. Scheduling AgentGeneral Criteria..... 1

B. Contact InformationCustomer Responsibilities..... 1

C. BPA Responsibilities ..... 2

### **A. Scheduling AgentGeneral Criteria**

1. The Scheduling Agent must be active in the NAESB Electric Industry Registry (EIR) with 24/7 scheduling capabilities.
- ~~1.2.~~ There is no limit to the number of Scheduling Agents a Customer may designate under a to schedule-Transmission Service Agreement (a Customer is under no obligation to name a Scheduling Agent), under all of its CONFIRMED TSRs. Designation of a Scheduling Agent to enter scheduling data in the Customer Data Entry (CDE) system allows the Scheduling Agent to access all of the Customer's CDE scheduling data, including data unrelated to the transactions for which the Scheduling Agent is designated.
- ~~2.~~ BPA will confirm that the party the Customer has designated to be their Scheduling Agent has a 24/7 desk code in NAESB Electric Industry Registry (EIR). If the Scheduling Agent is not designated, the Customer will need to give BPA 60 Calendar Days notice of signing a qualified Scheduling Agent prior to scheduling.
- ~~3.~~ The Customer may add or change its Scheduling Agent with 60 Calendar Days prior written notice to its assigned Transmission Account Executive either through email or by one of the methods listed in Section B, with a maximum of two (2) Scheduling Agent changes per resource during any FY (October through September).
3. BPA allows a maximum of two Scheduling Agent change requests per fiscal year (October through September).
4. For Scheduling Agent changes that require Customer Data Entry (CDE) access changes, refer to the CDE User Guide for information.

### **B. Contact Information**

<del>U.S. Postal Service</del>	<del>Bonneville Power Administration Transmission Marketing and Sales - TSE-TPP-2,</del>
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	<del>P.O. Box 61409, Vancouver, WA 98666-1409</del>
<del>Overnight Delivery Service (physical delivery: UPS, Fed Ex, etc.)</del>	<del>Bonneville Power Administration— Attn: (Addressee) Organization Mailstop: TSE/TPP-2 905 NE 11th Avenue Portland, OR 97232</del>
<del>Facsimile (fax) to:</del>	<del>(360) 619-6940</del>

**B. Customer Responsibilities**

1. A Customer must submit an authorization request on company letterhead to OATI at [Contracts@oati.net](mailto:Contracts@oati.net) for Scheduling Agent access. If the Customer’s software vendor is not OATI, the Customer must reach out to its vendor to inquire about the designation process.
  - a. The Customer’s authorization request must state the specific roles and responsibilities that the Customer is assigning to the designated Scheduling Agent to perform on their behalf.
  - b. The Customer must ensure the proposed Scheduling Agent submits a corresponding request on company letterhead to OATI for access to be the Customer’s Scheduling Agent.
2. Following the Customer’s receipt of verification from OATI that the designation has been completed, the Customer must provide written notification to its assigned Transmission Account Executive at least 60 Calander Days prior to the effective date of the Scheduling Agent designation change.

**C. BPA Responsibilities**

1. BPA will tender the Customer an original or revision of the Notices Exhibit of the Customer’s Transmission Service Agreement for execution to document the change to the Scheduling Agent designation.