

Scheduling Agent Change

BPA Transmission Business Practice

Version 5

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This business practice describes the process to change an existing Scheduling Agent designation.

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

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A. General Criteria

1. The Scheduling Agent must be active in the NAESB Electric Industry Registry (EIR) with 24/7 scheduling capabilities.
2. There is no limit to the number of Scheduling Agents a Customer may designate under a Transmission Service Agreement (a Customer is under no obligation to name a Scheduling Agent).
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. Customer Responsibilities

1. A Customer must submit an authorization request on company letterhead to OATI at 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.