BONNEVILLE POWER ADMINISTRATION

PTP TSR User Guide

Version 3
8/15/2024

This user guide is provided to Customers as a courtesy and is for information purposes only. The user guide provides TSR actions and submittal information that contain Open Access Technology International System (OATI) screenshots which are proprietary and are not to be used outside the context of this document. Do not distribute without specific authorization from OATI.

For more information on the types of submittals identified, refer to the applicable business practice or submit questions to tblresdesk@bpa.gov.

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A. Access Requirements

1. Customer must have an executed enabling Service Agreement with BPA.

2. Customer must have an active North American Energy Standards Board (NAESB) Electric Industry Registry (EIR) code.

3. Customer (or its Designated Agent) must have access to Open Access Same-Time Information System (OASIS).

B. Time Zone Setting

1. Verify the OASIS Time Zone is set correctly prior to submitting a request:

2. Access OASIS>My Settings>Misc User Settings.
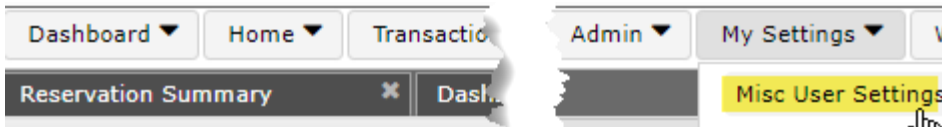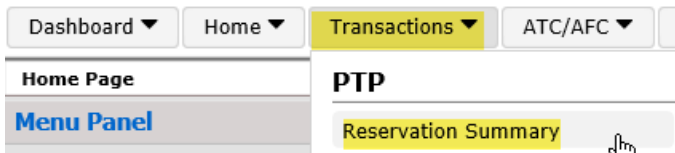

3. Select the applicable Time Zone:

   a. PD = approximately early March through early November.

   b. PS = approximately early November through early March.
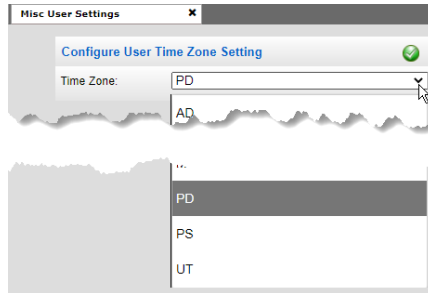
C. ORIGINAL TSR Submittal

1. Refer to the [Requesting Transmission Service Business Practice](#) (Requesting BP) for full details prior to submittal.

2. Access OASIS>Transactions>Reservation Summary.

3. Click the New TSR icon to open a New TSR screen.

4. Complete the following highlighted fields:

a. Customer: Select Customer EIR code.

b. Service Type: Select applicable service.

c. Request Type: ORIGINAL

d. Preconfirmed: Optional.

e. Source/Sink: Required for LTF TSR submittals.

    i. Entering the POR/POD first will reduce the options available for the Source/Sink.

f. POR/POD: Required for all TSR submittals.

g. Path: Leave blank.

h. Start Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines.

i. Stop Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines.

j. MW: Must be a flat MW amount for the duration of a LTF PTP TSR.

    i. Hourly requests can be shaped and 0 MW is a valid demand during the duration of a shaped Hourly TSR.

    ii. Monthly, Weekly, and Daily ST TSRs cannot be shaped.

k. Bid Price: Click Get Price to automatically populate field and click OK.

    i. Field is required for TSR submittal.

    ii. Price reflected does not necessarily reflect the price that will be billed.

    iii. The Customer will be charged per the posted PTP Rate Schedule.

l. Sale Ref: Enter the last five (5) digits of the PTP Service Agreement (example 24TX-12345).

m. CG Status: Refer to the Section N, SAMTS TSR Submittal.

n. Rollover Waived: Customer may select "Y" to waive Reservation Priority for LTF TSR submittals.

o. Status Notification: Enter email for TSR notification purposes.

p. Comments: Provide additional information regarding the TSR submittal.

    i. Refer to the [Requesting BP](#) regarding Partial Service and Newpoint comments required at the time of submittal.

5. Click the Enter TSR icon ✅ to open the Confirm Entry of TSR window.

a. If submittal information is correct, click the Submit TSR icon ✅.

b. If edits are needed or an error occurs:

    i. Correct error.

    ii. Click the Enter TSR icon ✅ to verify information.

    iii. Click Submit TSR icon ✅.

6. Click the Confirm TSR icon ✅.

7. Click OK

D. REDIRECT TSR Submittal

1. Refer to the [Redirect of Transmission Service Business Practice](#) (Redirect BP) for full details prior to submittal.

2. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Customer's CONFIRMED TSR (Reservation) that will be used as the parent Reservation (Parent Reservation) for submittal purposes.

a. Assign Ref: Enter the Parent Reservation.

b. Click APPLY.

3. Click the Parent Reservation hyperlink to open the Transmission Reservation Detail screen.

4. Click the Redirect icon 📋 to open a New TSR form.

a. The New TSR form should automatically populate with the Parent Reservation information.

b. Service Type: Remains the same as Parent Reservation.

c. Request Type: REDIRECT.

d. Preconfirmed: Optional.

e. Source/Sink: Update to redirected path (required for LTF TSR).

f. POR/POD: Update to redirected path.

g. Start Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines and the Redirect BP, Redirect Submittal Requirements Stop Time: Enter a date/time with the Requesting BP, TSR Submittal Timelines and the Redirect BP, Redirect Submittal Requirements but not to exceed the Parent Reservation Stop Time.

h. MW: Enter desired MW to redirect; cannot exceed the Parent Reservation MW.

    i. If the redirect is an Hourly TSR, the capacity may be profiled. Click the 24 Hr icon 24 Hr to display a 24-hour profile or the H icon to display an hourly profile.

    ii. Modify Start/Stop Times and MW amount to reflect the request profile.

    iii. To delete an Hourly H row, click the Delete Selected Row icon .

i. To add an Hourly H row, click the "Add Row icon .

j. Click Get Price button and click OK.

k. Related Ref: Enter Parent Reservation.

l. Sale Ref: Remains the same as Parent Reservation.

m. Rollover Waived: Customer may select "Y" to waive Reservation Priority for a Redirect to the end of the Parent Reservation.

    i. By default, BPA will assign Reservation Priority to the Redirect TSR if Rollover Waived is not selected.

n. Status Notification: Enter email for TSR notification purposes.

5. Click the Enter TSR icon to open the Confirm Entry of TSR window.

a. If changes are correct, click the Submit TSR icon .

b. If edits are needed or an error occurs:

    i. Correct error.

    ii. Click the Enter TSR icon to verify information.

    iii. Click Submit TSR icon .

6. Click OK.

E. RELINQUISH TSR Submittal for Short-Term and Hourly Firm Redirects

Note: This Relinquish scenario is only allowable for Conditional ST Firm Redirects of an Unconditional Parent Reservation.

1. Refer to the [Redirect of Transmission Service Business Practice](#) (Redirect BP) for full details prior to submittal.

2. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Redirect Reservation.

a. Assign Ref: Enter the Redirect Reservation.

b. Click APPLY.

3. Click the Redirect Reservation hyperlink to open the Transmission Reservation Detail screen.

4. Click the RELINQUISH icon 🚀 to open a New TSR form.

a. The New TSR form should automatically populate with the Redirect Reservation information.

b. Verify or update the following:

i. Request Type: RELINQUISH.

ii. Preconfirmed: Checked.

iii. Demand: Update demand to reflect the unscheduled capacity to be returned to the Redirect's Parent Reservation.

5. Click the Enter TSR icon ✅.

6. Click the Confirm TSR icon ✅.

7. Click OK.

F. RELINQUISH TSR Submittal for Hourly Non-Firm Redirects

Note: This Relinquish scenario is only allowable for Non-Firm Secondary Hourly Redirects of an Unconditional Parent Reservation.

1. Refer to the [Redirect of Transmission Service Business Practice](#) (Redirect BP) for full details prior to submittal.

2. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Redirect Reservation.

a. Assign Ref: Enter the Redirect Reservation.

b. Click APPLY.

3. Click the Redirect Reservation hyperlink to open the Transmission Reservation Detail screen.

4. Click the RELINQUISH icon 🚀 to open a New TSR form.

a. The New TSR form should automatically populate with the Redirect Reservation information.

b. Verify or update the following:

i. Request Type: RELINQUISH.

> ii. Preconfirmed: Checked.
>
> iii. Demand: Update demand to reflect the unscheduled capacity to be returned to the Redirect's Parent Reservation

5. Click the Enter TSR icon ⊘.

6. Click the Confirm TSR icon ✅.

7. Click OK.

8. Click OK.

G. DEFERRAL LT TSR Submittal

1. Refer to the [Deferral of Transmission Service Business Practice](#) (Deferral BP) for full details prior to submittal.

2. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Parent Reservation.

Home Page	✕	Reservation Summary	✕		🗊 🗊 🗊 🗊 🗊 **🗊** 🗊 🗊 🗊 🗊 🗊 🗊 🗊
Reservation Summary					

   a. Assign Ref: Enter the Parent Reservation.

   b. Click APPLY.

3. Click the Parent Reservation hyperlink to open the Transmission Reservation Detail screen.

4. Click the New TSR icon 🗊 to open a New TSR form.

   a. The New TSR form should automatically populate with the Parent Reservation information.

5. Update the following fields:

   a. Request Type: DEFERRAL.

   b. Start Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines and the Deferral BP, Deferral Submittal Requirements at least two months out but no greater than one (1) year out.

   c. Stop Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines and the Deferral BP, Deferral Submittal Requirements to be moved in tandem to retain duration.

   d. MW: Enter desired MW to defer; cannot exceed the Parent Reservation MW.

   e. Related Ref: Enter Parent Reservation.

   f. Click Get Price button and click OK.

   g. Status Notification: Enter email for TSR notification purposes.

6. Service Type, Source/Sink, POR/POD, and Sale Ref fields should remain the same as the Parent Reservation.

7. Click the Enter TSR icon ⊘ to open the Confirm Entry of TSR window.

a. If changes are correct, click the Submit TSR icon ⊘.

b. If edits are needed or an error occurs:

    i. Click the Back icon ← and correct.

    ii. Click the Enter TSR icon ⊘ to verify information.

    iii. Click Submit TSR icon ✅.

8. Click OK.

H. RENEWAL LT TSR Submittal

9. Refer to the [Renewal of Transmission Service (Reservation Priority) Business Practice](#) (Renewal BP) for full details prior to submittal.

10. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Parent Reservation.

a. Assign Ref: Enter the Parent Reservation.

b. Click APPLY.

11. Click the Parent Reservation hyperlink to open the Transmission Reservation Detail screen.

12. Click the Renewal TSR icon 📄 to open a New TSR form.

a. The New TSR form should automatically populate with the Parent Reservation information.

13. Update or verify the following fields:

a. Request Type: Defaults to RENEWAL.

b. Start Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines and the Renewal BP, Renewal Submittal Requirements.

c. Stop Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines and the Renewal BP, Renewal Submittal Requirements

    i. A TSR retains Reservation Priority if the TSR is a duration at least five (5) years but no greater than 30 years from the Start Time.

    ii. A TSR does not retain Reservation Priority if the TSR is a duration of one (1) year to four (4) years.

d. MW: Enter desired MW to renew; cannot exceed the Parent Reservation MW.

e. Related Ref: Auto-populated with the Parent Reservation.

f. Click Get Price button and click OK.

g. Rollover Waived: Customer may select "Y" to waive Reservation Priority for Renewal TSR that is five (5) years to 30 years.

h. Status Notification: Enter email for TSR notification purposes.

14. Service Type, Source/Sink, POR/POD, and Sale Ref fields should remain the same as the Parent Reservation.

15. Click the Enter TSR icon ✅ to open the Confirm Entry of TSR window.

    a. If changes are correct, click the Submit TSR icon ✅.

    b. If edits are needed or an error occurs:

        i. Click the Back icon ⬅ and correct.

        ii. Click the Enter TSR icon ✅ to verify information.

        iii. Click Submit TSR icon ✅.

16. Click OK.

I. FULL_TRANSFER LT TSR Submittal

1. Refer to the [Transfer of Service Business Practice](#) (Transfer BP) for full details prior to submittal.

2. Assignee is to perform the following actions:

    a. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Reseller's reservation.

        i. Assign Ref: Enter the Reseller's reservation.

        ii. Click APPLY.

    b. Click the Reservation hyperlink to open the Transmission Reservation Detail screen.

    c. Click the New TSR icon 📋 to open a New TSR form.

        i. The New TSR form should automatically populate with the Reseller's reservation information.

d. Select Request Type: FULL_TRANFER *prior to* the next steps.

e. Update or verify the following fields:

i. Seller: Select Reseller's EIR Code.

ii. Customer: Select Assignee's EIR Code, if not already populated.

iii. Service Type, Source/Sink, POR/POD, Start/Stop Time fields and MW amount must remain the same as the Reseller's reservation.

iv. Click Get Price button and click OK.

v. Sale Ref: Enter the last five (5) digits of the Assignee's PTP Service Agreement (example 24TX-12345).

f. Click the Enter TSR icon ✅ to open the Confirm Entry of TSR window.

i. If changes are correct, click the Submit TSR icon ✅.

ii. If edits are needed or an error occurs:

1. Click the Back icon ⬅ and correct.

2. Click the Enter TSR icon ✅ to verify information.

3. Click Submit TSR icon ✅.

g. Provide TSR to Reseller for further actions.

h. Click OK.

3. Reseller to perform the following actions:

a. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Assignee's TSR.

i. Assign Ref: Enter the Assignee's TSR.

ii. Click APPLY.

b. Click the Reservation hyperlink to open the Transmission Reservation Detail screen.

c. Click the Seller update icon.

d. Click Add/Edit Reassign.

e. Click inside the Reassigned Ref field for drop down arrow. Select the Reseller's reservation to be transferred.

f. Click Submit button.

g. Click OK.

h. Update New Status from QUEUED to ACCEPTED.

i. Click Submit icon.

j. Click OK.

4. BPA to perform one of the following actions:

   a. APPROVE:

      i. Upon approval, the Reseller's EIR Code on the transferred reservation will automatically update to reflect the Assignee's EIR Code and it is now the Assignee' reservation.

Assign Ref ▼	Request Type	Reassigned Ref	Seller	Customer	Sale Ref	Status	MW Req	MW Grant
69835685	ORIGINAL		BPAT	BPSE	12345	CONFIRMED	2	2

      ii. The FULL_TRANSFER TSR will automatically update to CONFIRMED and will serve as a placeholder reservation only.

Assign Ref ▼	Request Type	Reassigned Ref	Seller	Customer	Sale Ref	Status	MW Req	MW Grant
69836476	FULL_TRANSFER	69835685	APSE	BPSE	34570	CONFIRMED	2	2

   b. DISAPPROVE.

J. PART_TRANSFER LT TSR Submittal

1. Refer to the [Transfer of Transmission Service Business Practice](#) (Transfer BP) for full details prior to submittal.

2. Assignee is to perform the following actions:

   a. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Reseller's reservation.
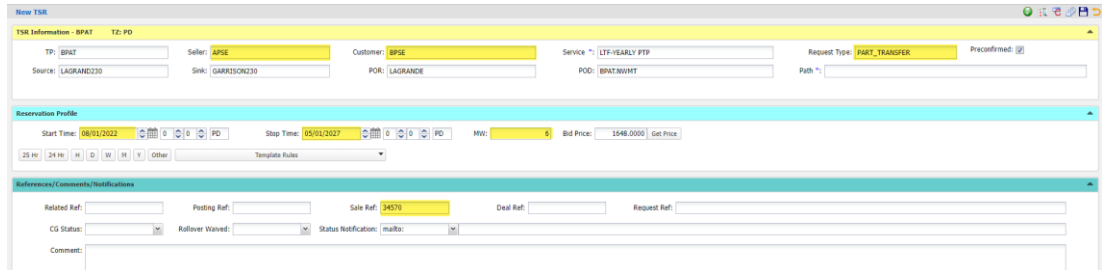
      i. Assign Ref: Enter the Reseller's reservation.

      ii. Click APPLY.

   b. Click the Reservation hyperlink to open the Transmission Reservation Detail screen.

   c. Click the New TSR icon to open a New TSR form.

      i. The New TSR form should automatically populate with the Reservation information.

   d. Select Request Type: PART_TRANSFER *prior to* the next steps.

   e. Update or verify the following fields:

      i. Seller: Select Reseller's EIR Code.

      ii. Customer: Select Assignee's EIR Code, if not already populated.

      iii. Start Time: Must be the same as or after the Reseller's reservation Start Time.

      iv. Stop Time: Must be the same as or before the Reseller's reservation Stop Time.

      v. MW: Enter desired MW to transfer. MW amount must be less than or equal to the Reseller's reservation MW.

      vi. Service Type, Source/Sink, POR/POD, remain the same as the Reseller's reservation.

      vii. Click Get Price button and click OK.

      viii. Sale Ref: Enter the last five (5) digits of the Assignee's PTP Service Agreement (example 24TX-12345).

   f. Click the Enter TSR icon to open the Confirm Entry of TSR window.

      i. If changes are correct, click the Submit TSR icon.

ii. If edits are needed or an error occurs:

1. Click the Back icon ⬅ and correct.

2. Click the Enter TSR icon ✅ to verify information.

3. Click Submit TSR icon ✅.

g. Provide TSR to Reseller for further actions.

h. Click OK.

3. Reseller to perform the following actions:

a. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Assignee's TSR.

i. Assign Ref: Enter the Assignee's TSR.

ii. Click APPLY.

b. Click the Reservation hyperlink to open the Transmission Reservation Detail screen.

c. Click the Seller update icon.

d. Click Add/Edit Reassign.

e. Click inside the Reassigned Ref field for drop down arrow. Select the Reseller's reservation to be transferred.

f. Enter Reassigned capacity if less than Reseller's reservation MW amount.

g. Click Submit button.

h. Click OK.

i. Update New Status from QUEUED to ACCEPTED.

    j.   Click Submit ✅ icon.

    k.   Click OK.

4. BPA to perform one of the following actions:

    a.   APPROVE:

         i.   Upon approval, the PART_TRANSFER TSR will automatically update to CONFIRMED.

Assign Ref ▼	Request Type	Reassigned Ref	Seller	Customer	Sale Ref	Status	MW Req	MW Grant
69836623	PART_TRANSFER	69832304	APSE	BPSE	34570	CONFIRMED	6	6

    b.   DISAPPROVE.

K. CONSOLIDATION TSR Submittal

1. Refer to the [Consolidation of Transmission Service Business Practice](#) (Consolidation BP) for full details prior to submittal.

2. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for a Reservation to be consolidated.

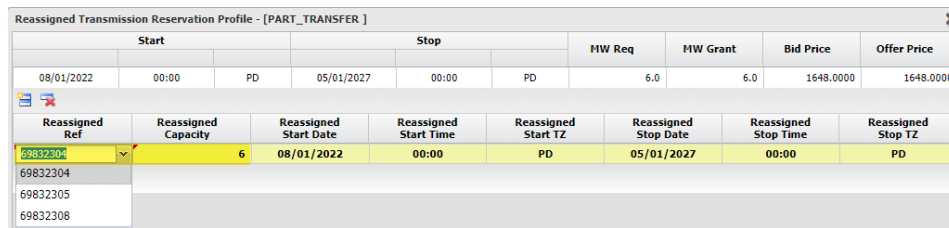   a.   Assign Ref: Enter a Reservation.

    b.   Click APPLY.

3. Click the Reservation hyperlink to open the Transmission Reservation Detail screen.

4. Click the TransAssign icon 📑 to open a New TSR window.

5. Update or verify the following fields:

    a.   Customer: Customer name will update when Request Type of CONSOLIDATION is selected.

    b.   Service Type: Verify field matches the Reservation.

    c.   Request Type: Select CONSOLIDATION from the Request Type drop down.

    d.   Preconfirmed: Must be checked.

    e.   Source/Sink: Verify fields match the Reservation.

    f.   POR/POD: Verify fields match the Reservation.

    g.   Status: Select QUEUED.

     h.   Start Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines and the Consolidation BP, Consolidation Submittal Requirements.

     i.   Stop Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines and the Consolidation BP, Consolidation Submittal Requirements.

     j.   Bid Price: Click Get Price.

     k.   Sale Ref: Verify Service Agreement is shown.

6. Click the Add/Edit Reassign icon to open the Reassigned Transmission Reservation Profile window.

7. Click in the Reassigned Ref field and select the applicable Reservation to be consolidated.

8. To consolidate additional Reservations, click one of the Add a Row icons (the first icon adds a row above the first TSR entered; the second icon adds a row below the first TSR entered).

9. Verify or modify Reassigned Capacity.

10. Repeat steps 7 through 9 to include additional Reservations.

11. Click the Submit icon to add the Reassignment to the new Consolidation TSR, click OK.

12. The Reassigned Reservations will display in the Reassigned Transmission Reservation Profile section of the new Consolidation TSR.

13. Verify the MW displayed in the Consolidation TSR matches the total capacity obtained from the Reassigned Reservations.

14. Click the Enter TSR icon to open the Confirm Entry of TSR window.

15. Click Submit TSR icon .

16. Click OK.

L. View Reliability Limits of a TSR

1. Customers who have access to the Customer Data Entry (CDE) system can view Reliability Limits in CDE. This Section H is for Customers who do not have access to CDE.

2. Customers may view the Reliability Limit of a TSR for the following reasons:

    a. Verify an action such as a Resale will not exceed the reliability limit.

    b. To see if a reliability action has been performed and cut tags may be possible.

3. Access OASIS>Transactions>Reservation Reduction Summary.
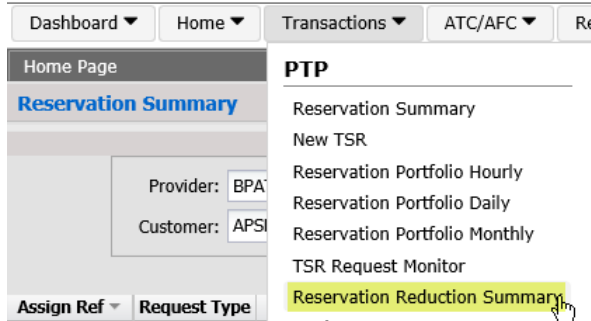
4. Click the Filter icon to filter for the following:

    a. Customer: Select Customer EIR Code.

    b. Ref: Enter the Reservation.

    c. Reduction Type: RELIABILITY.

    d. Click Apply.

5. Click the Reservation hyperlink, if displayed to display the Reduction Details screen for the Avail MW.

M. RESALE TSR Submittal (Off-OASIS)

1. The Resale offering and negotiation with the Assignee is conducted off-OASIS.

2. The Reseller posts a sale of all or a portion of the Reseller's Reservation to a pre-selected buyer (Assignee).

3. Refer to the [Resale of Transmission Service Business Practice](#) (Resale BP) for full details of Long-Term (LT) and Short-Term (ST) resales prior to submittal.

4. There are several ways to process through the steps of a TransAssign on OASIS. The steps below describe only one way to do it.

5. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Reservation to be resold.

    a. Assign Ref: Enter a Reservation.

    b. Click APPLY.

6. Click the Parent Reservation hyperlink to open the Transmission Reservation Detail screen.

7. Click the TransAssign icon to open a New TSR window.

    a. The New TSR form should automatically populate with the Parent Reservation information with a default request type of RESALE.

8. Update or verify the following fields:

    a. Customer: Select the EIR code of the Assignee.

    b. Service Type: Verify field matches the Reservation.

    c. Request Type: Verify RESALE is shown.

    d. Preconfirmed: Must be unchecked.

    e. Source/Sink: Verify fields match the Reservation.

    f. POR/POD: Verify fields match the Reservation.

    g. Status: Verify ACCEPTED is shown.

    h. Start Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines.

    i. Stop Time: Enter a date/time in accordance with the Requesting BP, TSR Submittal Timelines.

    j. Bid Price: Modify in $/MW-HOUR RESERVED, if needed.

    k. Sale Ref: Select the Assignee's Service Agreement.

9. Click the Add/Edit Reassign icon to open the Reassigned Transmission Reservation Profile window.

10. Click in the Reassigned Ref field and select the applicable Reservation(s) for Resale.

11. Verify or modify Reassigned Capacity.

12. Click the Submit icon to add the Reassignment to the new Resale TSR, click OK.

13. The Reassigned TSR(s) will display in the Reassigned Transmission Reservation Profile section of the new Resale TSR.

14. Verify the MW displayed in the Resale TSR matches the total capacity obtained from the Reassigned Reservation(s), modify if needed.

15. Click the Enter TSR icon ✅ to open the Confirm Entry of TSR window.

16. Click Submit TSR icon ✅.

17. Click OK.

18. Assignee must update the OASIS status of the TSR from ACCEPTED to CONFIRMED.

   a. Once CONFIRMED wait a minute or so before tagging to ensure the Resale does not go ANNULLED for an invalid Resale, such as a missing or incorrect Sale Ref.

N. RESALE Offer Submittal (On-OASIS)

1. The Reseller posts all or a portion of the Reseller's Reservation for sale to the open market on OASIS.

2. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for a Reservation to be resold.

   a. Assign Ref: Enter the Reservation.

   b. Click APPLY.

3. Click the Parent Reservation hyperlink to open the Transmission Reservation Detail screen.

   a. Click the Post for Resale icon 🔴 to open the New Transmission Resale Posting screen.

   b. Offer Start Time/Offer Stop Time: Update to reflect the Resale offer duration.

   c. Offer Increment: Select the increment of the Resale, if applicable.

   d. Capacity: Enter the capacity amount of the Resale.

   e. Offer Price: Enter price of Resale.

   f. Start Time/Stop Time: Updated to reflect the Resale duration.

   g. TZ: Update to reflect the appropriate time zone.

4. To make multiple offerings from a single Reservation:

   a. Click the Add Row tab for a new row to be added.

b. Repeat Section N.3.b. through N.3.g. for each Resale transmission offering.

5. Verify that all the fields in the Reassignment Information section display the information of the Reservation being resold, update if needed.

a. Click the Submit icon ✅.

6. The Reseller should note the Posting Ref number generated by OASIS for tracking and documentation purposes.

7. Click Ok.

8. The Reseller may access OASIS>ATC/AFC>Transmission Resale Offerings to view the Resale offer.
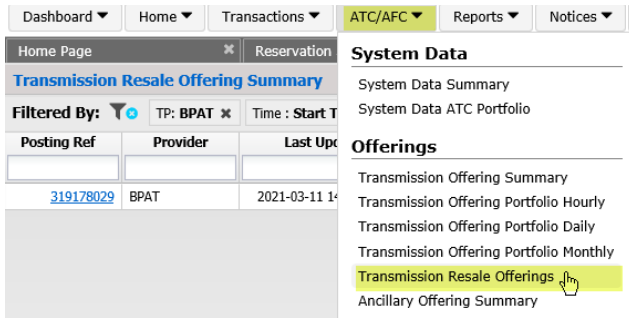
a. Click the Server Filter Options icon to access the Filtering Options:

b. Ref: Enter the Posting Ref number generated in Section N.6.

c. Click APPLY.

9. The Reseller may remove the posting for an offer of transmission service by completing the following actions.

a. Repeat Section 7.a through 7.c.

b. Click the Posting Ref number hyperlink to display the Transmission Resale Offering detail page.

c. Change the Start/Stop Times in the Times/Price section to a date/time prior to the current date.

d. Click the Submit icon ✅.

10. An Assignee may make an offer on a posting by completing the following actions:

a. Access OASIS>ATC/AFC>Transmission Resale Offerings to view the Resale offer as shown in Section N.7.

b. Click the Posting Ref number hyperlink of an offer of interest to display the offer profile.

c. Click the Create TSR icon ⬛.

d. Update or verify the following:

  i. Request Type: RESALE

  ii. Preconfirmed: Optional

  iii. Source/Sink: Required for LT Resales. Must match Reseller's Resale offer, contact Reseller for Source/Sink.

  iv. POR/POD: Must match Reseller's Resale offer.

  v. Start Time/Stop Time: Verify for full duration of offer or modify for only a portion of the offer to be purchased.

  vi. Bid Price: Click the Get Price button to populate the field.

e. Sale Ref: Select the Assignee's Service Agreement (#####).

f. Click the Enter TSR icon ✅.

g. Verify that the information contained on the screen describes the desired purchase.

h. Click the Confirm TSR icon ✅.

11. Provide TSR to the Reseller for acceptance.

12. Click OK.

13. The Reseller may accept an offer on a Resale posting by completing the following actions:

a. Access OASIS>ATC/AFC>Transmission Resale Offerings as shown in Section N.7.

b. Click the magnifying glass to select the Assignee's TSR.

c. Type the TSR of the offer into the field and (if multiple TSRs are shown select the applicable TSR) and then click Enter. The TSR will display.

d. Click the ACCEPTED icon 🅰.

  i. A dialog box will display asking "Are you sure you want to do this operation? You will not be able to undo this operation", click OK.

  ii. A dialog box will display stating "Status has changed", click OK.

e. If the TSR was submitted Preconfirmed, the TSR will display in CONFIRMED status.

14. If the TSR was not submitted Preconfirmed, the Assignee will need to filter for the TSR and click the Assign Ref of the TSR to display the TSR information.

a. Click the CONFIRMED icon.

O. TSEP Follow-On ORIGINAL TSR Submittal

This section is applicable to Cluster Study or Individual Study TSRs only. Refer to the [TSR Study Expansion Process Business Practice](#) (TSEP BP) for full details prior to submittal.

1. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the Initial Original Cluster Study TSR (Initial TSR).

   a. Assign Ref: Enter the Initial TSR.

   b. Click APPLY.

2. Click the Initial TSR hyperlink to open the Transmission Reservation Detail screen.

3. Click the New TSR icon to open a New TSR form.

   a. The New TSR form should automatically populate with the Initial TSR information.

4. Update or update the following fields:

   a. Request Type: Verify request type is ORIGIANL.

   b. Start Time: Enter date/time in accordance with the Requesting BP, TSR Submittal Requirements and TSEP BP, follow-on TSR submittal requirements and must match the Stop Date of the Initial TSR.

   c. Stop Time: Enter date/time in accordance with the Requesting BP, TSR Submittal Requirements and TSEP BP, follow-on TSR submittal requirements must move Stop Time in tandem to retain duration of the Initial TSR.

   d. Deal Ref: Enter Initial TSR.

   e. Click Get Price button and click OK.

   f. Status Notification: Enter email for TSR notification purposes.

5. Service Type, Source/Sink, POR/POD, MW and Sale Ref fields should remain the same as the Initial TSR.

6. Click the Enter TSR icon to open the Confirm Entry of TSR window.

   a. If changes are correct, click the Submit TSR icon.

   b. If edits are needed or an error occurs:

      i. Click the Back icon and correct.

      ii. Click the Enter TSR icon to verify information.

      iii. Click Submit TSR icon.

7. Click OK.

8. Repeat steps for subsequent follow-on TSRs, if applicable.

P. TSEP Follow-On REDIRECT TSR Submittal

This section is applicable to Cluster Study or Individual Study Redirect TSRs only and the Redirect's Parent Reservation must have been renewed (Renewal Reservation) to be able to submit a follow-on Redirect TSR. Refer to the TSR Study Expansion Process Business Practice for full details prior to submittal.

1. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the initial Redirect Cluster Study TSR (Initial TSR).

   a. Assign Ref: Enter the Initial TSR.

   b. Click APPLY.

2. Click the Renewal Reservation hyperlink to open the Transmission Reservation Detail screen.

3. Click the Redirect icon to open a New TSR form.

   a. The New TSR form should automatically populate with the Initial TSR information.

   b. Request Type: REDIRECT.

   c. Preconfirmed: Optional.

   d. Start Time: Enter date/time in accordance with the Requesting BP, TSR Submittal Requirements and TSEP BP, follow-on Redirect TSR submittal requirements and must match the Stop Time of the Initial Redirect TSR.

   e. Stop Time: Enter date/time in accordance with the Requesting BP, TSR Submittal Requirements and TSEP BP, follow-on Redirect TSR submittal requirements and must match the Stop Time of the Parent Reservation.

   f. Click Get Price button and click OK.

   g. Related Ref: Enter the Renewal Reservation.

   h. Deal Ref: Enter Initial TSR

   i. Status Notification: Enter email for TSR notification purposes.

4. The Service Type, Source/Sink, POR/POD, MW, and Sales Ref must match the same as the Initial TSR.

5. Click the Enter TSR icon to open the Confirm Entry of TSR window.

   a. If changes are correct, click the Submit TSR icon .

   b. If edits are needed or an error occurs:

      i. Correct error.

      ii. Click the Enter TSR icon to verify information.

      iii. Click Submit TSR icon .

6. Repeat steps for subsequent follow-on Redirect TSRs, if applicable.

Q. SAMTS TSR Submittal

1. Refer to the [Requesting Transmission Service Business Practice](#) for full details prior to submittal.

2. Refer to Section B for Original TSR submittal steps plus the required parameters below.

   a. Preconfirmed: Must be clicked at submittal.

   b. CG Status: PROPOSED must be selected at the time of submittal, it cannot be updated after submittal.

      i. This status notifies BPA that the request is part of a SAMTS group.

3. Click the Enter TSR icon 🟢 to open the Confirm Entry of TSR window.

   a. If changes are correct, click the Submit TSR icon 🟢.

   b. If edits are needed or an error occurs:

      i. Correct error.

      ii. Click the Enter TSR icon 🟢 to verify information.

      iii. Click Submit TSR icon 🟢.

4. Note the coordinated request (CR) Assign Ref number (CR TSR) generated by OASIS for tracking and documentation purposes.

5. Return to the Reservation Summary and click the Filter icon to filter for the CR TSR just created.

6. Click the CR TSR hyperlink to open the Transmission Reservation Detail screen.

7. Click the PROPOSED hyperlink to display the New Coordinated Group screen and update the following:

   a. (CR) TP: Defaults to BPAT. Customer may select "Other" and manually enter the TP's acronym.

    b. (CR) Disposition:

        i. Select PENDING if entering a TSR that is part of a CG on another TP's system.

        ii. Select CONFIRMED if including an existing Reservation as part of the CG. This option will not be available when the CR TSR is ATTESTED.

        iii. Select DELETED if the TSR needs to be removed from the CG. This option will not be available when the CR TSR is ATTESTED

    c. (CR) AssignRef: Select the applicable TSR/Reservation.

    d. (CR) Increment: Select applicable increment.

    e. (CR) TS Class: Select applicable class.

    f. (CR) TS Type: Select applicable type.

    g. (CR) Disposition Time: See Section M.15 for update information.

        i. Blank for a PENDING TSR.

        ii. .Populates with the confirmation date of a Reservation.

8. Click the Add a Row icon and repeat Section M.7.a through M.7.g.ii to add additional TSRs to the CG. Click the Delete icon to remove extra rows, if needed.

9. Click the Submit icon when all CR TSRs have been added.

10. Click OK.

11. If contiguity requirements have been met per Section C of the [Requesting Transmission Service Business Practice](#), the Customer must attest the CR TSR by completing the following:

    a. Access the CR TSR hyperlink again.

    b. Note the CG Deadline Date and time (24 hours).

        i. CR TSR must be updated to ATTESTED within the CG Deadline Date and time.

        ii. CR TSR status will automatically update to INVALID after CG Deadline Date and time.

    c. Click the Customer Update icon .

    d. Select ATTESTED in the CG Status field.

    e. Click the Submit changes icon and click OK.

12. BPA will update the OASIS status of the CR TSR to:

   a. CR_ACCEPTED if the request can be granted in full.

   b. CR_COUNTEROFFER if a partial offer is available.

   c. REFUSED if no ATC is available.

13. The Customer may REBID or update the status to CONFIRMED once the status is updated to CR_ACCEPTED or CR_COUNTEROFFER.

   a. Refer to Section O of this document for REBID actions.

   b. Refer to Section Q of the [Requesting Transmission Service Business Practice](#) for Response Timing Requirements.

14. The Customer must update the (CR) Disposition of the CG TSRs to reflect the type of service being offered:

   a. PENDING – The initial status for a CG TSR that has been submitted but not yet acted upon by the Transmission Provider.

   b. WITHDRAWN –The CG TSR was withdrawn from consideration if one or more Transmission Providers respond with a TSR status other than CR_ACCEPTED and the Customer declines to confirm the CG TSR.

   c. FULL – The CG TSR was granted at the full requested capacity, i.e., the coordinated request was set to CR_ACCEPTED.

   d. PARTIAL – The CG TSR was granted at less than the full requested capacity, i.e., the coordinated request was set to CR_COUNTEROFFER.

   e. PREEMPTED – The CG TSR was displaced in whole by a higher priority request and was set to a final state of SUPERSEDED.

      i. A CG Reservation will have a RECALL of capacity but will maintain a status of CONFIRMED.

   f. NONE – The CG TSR was set to some final state other than CR_ACCEPTED or CR_COUNTEROFFER, e.g., REFUSED.

Update Coordinated Group

TP	AssignRef	Increment	Class	Type	Window	Period	
BPAT	69832515	DAILY	FIRM	POINT_TO_POINT	EXTENDED	FULL_PERIOD	MONTHLY

(CR) TP	(CR) Disposition	(CR) AssignRef	(CR) Increment	(CR) TS Class	(CR) TS Type	(CR) Disp
	PENDING ✕ ⌄ 0		YEARLY	NON-FIRM	NETWORK	
	PENDING	0	MONTHLY	FIRM	POINT_TO_POINT	
	WITHDRAWN					
	FULL					
	PARTIAL					
	PREEMPTED					
	NONE					

15. Customer must update the (CR) Disposition Time of the CG TSRs to reflect the date the offer was made.

(CR) Disposition	(CR) AssignRef	(CR) Increment	(CR) TS Class	(CR) TS Type	(CR) Disposition Time	
FULL	69823110	YEARLY	FIRM	POINT_TO_POINT	03/18/2021 00:00:00	PD
PARTIAL	PF45185	YEARLY	FIRM	POINT_TO_POINT	03/15/2021 00:00:00	PD

16. Customer must update all of the CG TSRs to a non-PENDING state (i.e.; WITHDRAWN, FULL, PARTIAL, PREEMPTED, or NONE).

17. The Customer may REBID or update the status to CONFIRMED within the Response deadline once the status is updated to CR_ACCEPTED or CR_COUNTEROFFER.

a. Refer to Section O of this document for rebid actions and to Section L of the Requesting Transmission Service for Response Timing Requirements.
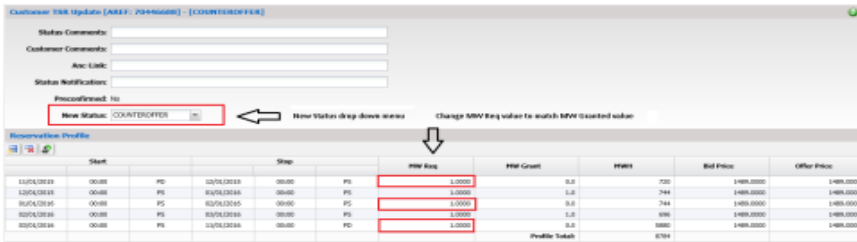
R. COUNTEROFFER Confirmation

Refer to the Requesting Transmission Service Business Practice for full details of a counteroffer due to partial service offer.

1. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the counteroffered TSR.

   a. Assign Ref: Enter the counteroffered TSR.

   b. Click APPLY.

2. Click the counteroffered TSR hyperlink to open the Transmission Reservation Detail screen.

3. Click the CONFIRM icon [C]. The Customer TSR Update screen will display.

4. Verify New Status has defaulted to CONFIRMED.

   a. Click the New Status drop-down menu to change the status to CONFIRMED, if needed.

5. In the Reservation Profile section, click the value in the MW Req column and change it to match the value in the MW Grant column.

6. Click the Submit Changes icon and then click OK.

7. Click OK to Save the Changes and Confirm the Counteroffer.

S. REBID an Offer of Service

Refer to the Requesting Transmission Service Business Practice for full details of a rebid once BPA has updated the OASIS status to ACCEPTED or COUNTEROFFER.
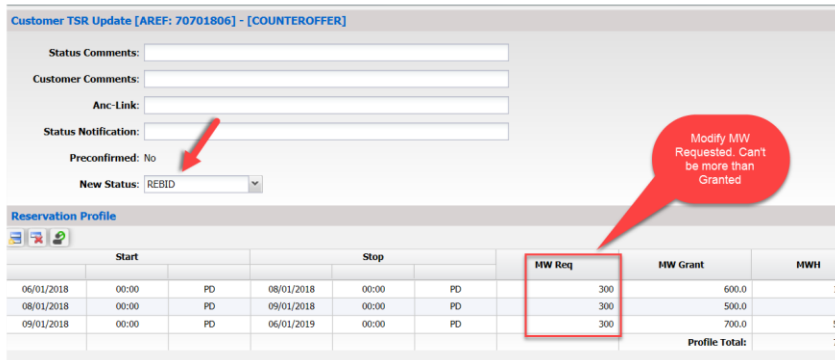
1. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the TSR.

   a. Assign Ref: Enter the counteroffered TSR.

   b. Click APPLY.

2. Click the counteroffer TSR hyperlink to open the Transmission Reservation Detail screen.

3. Click the REBID icon [R]. The Customer TSR Update screen will display.

4. Verify New Status is REBID.

   a. Click the New Status drop-down menu to change the status to REBID, if needed.

5. In each row in the Reservation Profile section, click the value in the MW Req column and change the MW value to a value that is less than or equal to the value displayed in the MW Granted column.

6. In each row in the Reservation Profile section, click the value in the MW Req column and change the MW value to a value that is less than or equal to the value displayed in the MW Granted column.

7. Click the Submit Changes icon [✓] and then click OK.

8. Customer can REBID until the TSR is CONFIRMED or in a final state.

   a. Refer to the Reservation Response Timing Requirements Table in the Requesting Transmission Service Business Practice for REBID time limits.

T. ACCEPTED Confirmation

1. Access OASIS>Transactions>Reservation Summary and click the Filter icon to filter for the ACCEPTED TSR.

   a. Assign Ref: Enter the ACCEPTED TSR.

   b. Click APPLY.

2. Click the ACCEPTED TSR hyperlink to open the Transmission Reservation Detail screen.

3. Click the CONFIRM icon [C].