

OASIS How Working Group Proposal to Link Ancillary Service Procurement to Transmission Service

The OASIS How WG is proposing in the Phase 1A Standards and Communications Protocol (S&CP) document a convention for linking ancillary services to transmission service. The convention is proposed for adoption by FERC, with an anticipated effective date in the Spring of 1998.

The convention is necessary to facilitate the purchase on OASIS of ancillary services by minimizing the transactional burden on the Transmission Customer. At the same time, the convention allows the Customer full freedom to purchase ancillary services from others or to self-provide, as permitted by applicable tariffs, and promotes equal opportunity for third party suppliers.

The convention has several parts. The first is standard naming of ancillary services. For now, the OASIS How WG proposes to support in OASIS Phase 1A the six services identified in the Schedules to the FERC Pro Forma Tariff. These services will be named PF1, PF2, PF3, PF4, PF5, and PF6. Additional ancillary service types may be registered by a Transmission Provider or Seller on the OASIS world wide web at www.tsin.com.

In the TRANSOFFERING and TRANSTATUS templates, the Transmission Provider will indicate in a data element called ANC_SERVICES_REQD, for a particular requested transmission service, which ancillary services:

- Must be taken from the Primary Provider as a condition of service transmission service {ANC_MANDATORY or M};
- Must be provided for as a condition of service, but may be procured from a third party or self-provided {ANC_REQUIRED or R}; or
- Are available, but optional {ANC_OPTIONAL or O}.

An additional category defined as {ANC_UNKNOWN or U} may be used in the TRANSOFFERING template when the requirement for a particular ancillary service is indeterminate until the specific transmission service request is received (i.e. ancillary services may depend on POR/POD).

In the TRANSREQUEST template, the Customer will be able to indicate in a data element called ANC_SERVICES_LINK his/her preferences for each ancillary service by indicating as part of the transmission service request:

1. The ancillary service requested {ANC_SERVICE_TYPE};
2. Entity by whom the ancillary service will be provided {CODE} - this may be the Primary Provider, a third party Provider or Seller, or the Customer in the case of self-provision;
3. Assignment Reference {AREF} for an existing ancillary service record, or FT indicating arrangements will be made in the future prior to scheduling, or SP indicating the ancillary service will be self-provided by the Customer, or RQ indicating the

Customer requests the Provider selected in 2. above to automatically create an ancillary service purchase request; and

4. Amount of the ancillary service {CAPACITY} (this is optional).

The overall process for linking of ancillary services to transmission services on OASIS is described as follows:

1. Transmission Providers and third party Sellers define available ancillary services, other than the pro forma services, by registering the service names and descriptions on www.tsin.com
2. The Transmission Provider indicates in TRANSOFFERING which ancillary services are mandatory, required, or optional for that transmission service. For ancillary service requirements which are not known until a specific request is received, the ancillary service requirement may be indicated as unknown.
3. The Transmission Customer submits a transmission service request using the TRANSREQUEST template. In this template, in the data element ANC_SERVICES_LINK, the Customer may request provision of ancillary services. The Customer may indicate a supplier of his/her choice for the ancillary service, any prior existing ancillary services rights to be used, and the amount of the service (if appropriate). For ancillary services which will be arranged for later, the Customer may indicate FT. For services to be self-provided, the Customer will indicate SP. If the Customer desires the indicated Provider/Seller of that particular service automatically create an ancillary service purchase request, then the Customer will indicate RQ.
4. Upon receipt of a transmission service request, the Primary Provider will automatically create ancillary service requests for all services which are mandatory (must be provided by the Primary Provider). All Providers and Sellers selected by the Customer will automatically create an ancillary service request for each service indicated as RQ by the Customer. The TSIP will update the data element ANC_SERVICES_LINK in the TRANSSTATUS template, showing the reference numbers for the ancillary service requests. The Transmission Provider may choose to accept or deny the transmission service request based on the adequacy of ancillary services provisions. The Transmission Provider would use available status options in OASIS and indicate a reason for denial.
5. The Transmission Customer will be required to confirm the transmission service and each requested ancillary service independently. If a Customer submits a transmission service request pre-confirmed, then the transmission service and all mandatory and required ancillary services associated with that transmission service will be considered also pre-confirmed by the Customer.