

A. Introduction

1. **Title:** Interchange Transaction Tagging

2. **Number:** INT-001-0

3. **Purpose:**

To ensure that Interchange Transactions, certain Interchange Schedules, and intra-Balancing Authority Area transfers using Point-to-Point Transmission Service are Tagged in adequate time to allow the transactions to be assessed for reliability impacts by the affected Reliability Coordinators, Transmission Service Providers, and Balancing Authorities, and to allow adequate time for implementation.

4. **Applicability:**

4.1. Purchase-Selling Entities.

4.2. Balancing Authorities.

5. **Effective Date:** April 1, 2005

B. Requirements

R1. The Load-serving Purchasing-Selling Entity shall be responsible for ensuring Tags are submitted for:

R1.1. All Interchange Transactions that are between Balancing Authority Areas

R1.2. All transfers that are entirely within a Balancing Authority Area using Point-to-Point Transmission Service (including all grandfathered and “non-Order 888” Point-to-Point Transmission Service).

R1.3. All Dynamic Schedules at the expected average MW profile for each hour.

R2. The Sink Balancing Authority shall be responsible for ensuring a Tag is provided:

R2.1. If a Purchasing-Selling Entity is not involved in the Transaction, such as delivery from a jointly owned generator.

R2.2. To replace unexpected generation loss, such as through prearranged reserve sharing agreements or other arrangements. If the duration of the Emergency Transaction to replace the generation loss is less than 60 minutes, then the Transaction shall be exempt from Tagging.

R2.3. All bilateral inadvertent interchange payback.

R3. The Purchasing Selling Entity responsible for submitting the Tag shall submit all Tags to the Sink Balancing Authority according to timing tables in Attachment 1-INT-001-0.

R4. The Balancing Authority or Purchasing-Selling Entity responsible for submitting the Tag shall include the reliability data listed in Attachment 2-INT-001-0 in the Tag.

R5. Each Purchasing-Selling Entity with title to an Interchange Transaction shall have, or shall arrange to have, personnel directly and immediately available for notification of Interchange Transaction changes. These personnel shall be available from the time that the title to the Interchange Transaction is acquired until the Interchange Transaction has been completed.

C. Measures

M1. A Balancing Authority shall provide documentation to show all scheduled interchanges between Balancing Authority Areas were Tagged.

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D. Compliance

Not Specified.

E. Regional Differences

1. [WECC Tagging Dynamic Schedules and Inadvertent Payback Waiver](#) effective on November 21, 2002.
2. [MISO Energy Flow Information Waiver](#) effective on July 16, 2003.

Version History

Version	Date	Action	Change Tracking
0	April 1, 2005	Effective Date	New
0	August 8, 2005	Removed “Proposed” from Effective Date	Errata

Attachment 1-INT-001-0 — Tag Submission and Response Timetables for New Transactions

Eastern Interconnection – New Transactions

The table below represents the Tag submission and assessment deadlines within the Eastern Interconnection. These are default requirements; some regulatory or provincially-approved provider practices may have requirements that are more stringent. Under these instances, the more restrictive criteria shall be adhered to. The table describes the various minimum submission and assessment timing requirements.

Table 1: Eastern Interconnection – Timing Requirements

Transaction Duration	PSE Submit Deadline*	Actual Tag Submission Time	Provider Assessment Time	Time to Start of Transaction
Less than 24 Hours	20 Minutes prior to start	≤1 Hour prior to start	≤ 10 Minutes from Tag receipt	≥ 10 Min
		>1 to <4 hours prior to start	≤20 Minutes from Tag receipt	≥ 40 Min
		≥ 4 Hours prior to start	≤ 2 Hours from Tag receipt	≥ 2 Hours
24 Hours or longer	4 Hours prior to start	Any	≤ 2 Hours from Tag receipt	≥ 2 Hours
*Start time references are for start of the Transaction not the start of the Ramp.				

Tag submission timing requirements are based on the duration of the Transaction. Tags representing Transactions that run for less than one day (24 hours) must be submitted at least 20 minutes prior to the start of the Transaction (excluding Ramp time). Tags representing Transactions running for one day or more (24 hours or more) must be submitted at least four hours prior to the start. Tags submitted that meet these requirements shall be considered “on-time” and may be granted conditional approval. Tags submitted that do not meet these requirements shall be considered “late,” and consequently will be denied if not explicitly approved by all parties.

Tag assessment timing requirements are based on the submission time of the Tag, as well as the duration. Hourly Tags submitted one hour or less prior to start must be evaluated in ten minutes. Hourly Tags submitted more than one hour but less than four hours prior to start must be evaluated in 20 minutes. Tags of a duration less than 24 hours that are submitted four hours or more prior to start must be evaluated in two hours. Tags of duration 24 hours or more must be evaluated in two hours.

1) Eastern Interconnection — Reallocation During a Transmission Loading Relief (TLR) Event

During a NERC TLR event, Transactions may be submitted to replace existing Transactions with a lower transmission priority. The new Transaction Tag must be received no later than 35 minutes prior to the top of the hour to allow time for Reliability Coordinator to assess the impact of reallocation.

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Western Interconnection – New Transactions

The table below represents the Tag submission and assessment deadlines within the Western Interconnection. These are default requirements. The tables describe the various minimum submission and assessment timing requirements.

Table 2: Western Interconnection – Timing Requirements

Transaction Start/Submittal Time	Late Status Deadline	Actual Tag Submission Time*	Provider Assessment Time	Approval/Denial Notes	Time to Start of Transaction*
Start 00:00 next day or beyond when submitted prior to 18:00 of the current day	15:00 day prior to start	Any	3 hours	Passive approval if submitted before deadline, else passive denial. Deferred denial	≥ 6 Hours
Start 00:00 next day and submitted between 18:00 and 23:59:59 on day prior to start – OR – start within current day		≥ 4 Hours prior to start	2 Hours from Tag receipt	Passive approval Deferred denial	≥ 2 Hours
		<4 Hours to ≥1 Hour prior to start	20 minutes from Tag receipt	Passive approval Deferred denial	≥ 40 Min
		<1 hour to ≥30 minutes prior to start	10 minutes from Tag receipt	Passive approval Deferred denial	≥ 20 Min
		<30 minutes to ≥20 minutes prior to start	10 minutes from Tag receipt	Passive approval Deferred denial	≥ 10 Min
	20 minutes prior to start	<20 minutes prior to start	5 minutes from Tag receipt	Passive denial. Deferred denial	Submission time minus maximum time of 5 minutes

Notes/Clarification:

All clock times are in Pacific Prevailing Time (PPT).

Tags falling under the criteria in the first row are deemed pre-schedule Tags.

Tags falling under the criteria in the remaining rows are deemed real-time Tags.

Pre-schedule Tags submitted between 15:00 and 18:00 will be assigned LATE composite status.

Real-time Tags submitted after 20 minutes prior to the start of the Transaction will be assigned LATE composite status.

*Start-time references are for start of the Transaction, not the start of the Ramp.

Tag submission timing requirements are based on the type and duration of the Transaction. Tags representing Transactions that run for less than one day (24 hours) within the current day must be submitted at least 20 minutes prior to the start of the Transaction (excluding Ramp time). Tags representing Transactions that are pre-scheduled to start the next day must be submitted by 1500 PST the

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day prior to the day the Transaction is to start. Tags submitted that meet these requirements shall be considered “on-time” and may be granted conditional approval. Tags submitted that do not meet these requirements shall be considered “late,” and consequently will be denied if not explicitly approved by all parties.

Tag assessment timing requirements are based on the submission time of the Tag, as well as the duration. Hourly Tags submitted one hour or less prior to start must be evaluated in ten minutes. Hourly Tags submitted more than one hour but less than four hours prior to start must be evaluated in 20 minutes. Tags of a duration less than 24 hours that are submitted four hours or more prior to start must be evaluated in two hours. Tags submitted for pre-scheduled service starting the next day or a future day must be evaluated in three hours.

Attachment 2-INT-001-0 — Required Tag Data

The following is the reliability information necessary to assess a Transaction:

1. Physical path — the description of physically scheduling parties, always containing a generation segment, at least one transmission segment, and a Load segment.
2. Generation — the physical characteristics of the energy source.
3. Resource service point — the physical point at which the energy is being generated. This may vary in granularity, depending on local practices.
4. Energy profile — energy to be produced by the generator for each time segment of the Transaction.
5. Transmission — the physical characteristics of a wheel (import, export, or through).
6. Transmission Service Provider — the identity of the Transmission Service Provider that is wheeling the energy.
7. Point of receipt — valid point of receipt for scheduled transmission reservation.
8. Point of delivery — valid point of delivery for scheduled transmission reservation.
9. Scheduling entity(ies) — entities that are physically scheduling interchange on behalf of the Transmission Service Provider in order to provide wheeling services. Typically this is the Balancing Authority providing a service for the Transmission Service Provider, but several Balancing Authorities may be supporting a regional transmission service.
10. Loss provision — the manner in which losses are accounted when they are not scheduled as in-kind megawatt distributions through the original transaction or through a separately Tagged transaction.
11. POR and POD profiles — schedule of energy flow imported at the Point of Receipt and Exported at the Point of Delivery.
12. Transmission reservation number — reference to a particular transmission reservation being used to provide transmission capacity to support the transaction being described.
13. Transmission reservation profile — information describing the transmission reservation commitment.
14. Transmission product — the firmness of service associated with the transmission reservation being used.
15. Load — the physical characteristics of the energy sink.
16. Resource service point (sink) — the physical point at which the energy is being consumed. This may vary in granularity, dependent on local practices.
17. Energy profile — energy to be consumed by the Load for this Transaction.
18. Contact information of person representing the Purchasing-Selling Entity responsible for the Tag.

The following information is required to modify a Transaction:

19. The Transaction being curtailed or reloaded.
20. All necessary profile changes to set the maximum flow allowed for the transaction during the appropriate hours.
21. A contact person that initiated the curtailment or reload.