

Deferral of Transmission Service (Extensions for Commencement of Service)

BPA Transmission Business Practice

Version 22

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This business practice describes the requirements and process of extensions for commencement of service (DEFERRAL Request Type on OASIS) for Long-Term Firm Point-to-Point (PTP) Transmission Service, and the Deferral reservation Competition process.

BPA Policy Reference

- [Open Access Transmission Tariff \(OATT\)](#): 17.7
- [Transmission Rate Schedules/Provisions](#): PTP Rate Schedule

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

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A. General Deferral Requirements

1. The service can be deferred up to five (5) times for Long-Term Firm (LTF) PTP Transmission Service.
 - a. Each CONFIRMED Deferral Transmission Service Request (Deferral reservation) will count against the five (5) deferrals, regardless of duration of extension and/or redirects of service. See A.1.b for exception.
 - b. Multiple Deferral TSRs for part or all of the Parent Reservation may be counted as one (1) Deferral if the following conditions are met:

- i. The Deferral TSRs are submitted on the same Calendar Day.
 - ii. The Related Ref field of the Deferral TSRs each specify the same Parent Reservation.
2. Once a Parent Reservation is split into multiple partial Deferral TSRs, BPA does not allow the Deferral TSRs to be recombined into a single Deferral reservation.
 - a. Refer to the [Consolidation of Transmission Service Business Practice](#) for consolidation information and requirements.
3. If the Parent Reservation has been transferred on OASIS to a single Assignee or multiple Assignees prior to deferring available capacity, each Assignee retains the remaining extensions for commencement of service for its transferred portion of the Parent Reservation.
4. A Customer may choose to defer the Service Commencement Date (SCD) up to, but not to exceed, one (1) year.
5. A Customer can only defer available capacity from the Parent Reservation.
6. A Deferral TSR will be REFUSED if:
 - a. The Deferral would result in a shorter service duration due to a reservation priority restriction that does not encumber capacity past the Stop Date of the Parent Reservation;
 - b. The Parent Reservation being deferred is less than five (5) years for reservation priority or and has ATC impacts or Subgrid impacts past the Stop Date of the Parent Reservation; and
 - c. The Parent Reservation has OASIS actions that decrements the capacity needed to enable a Deferral TSR prior to being CONFIRMED.

B. Deferral Submittal Requirements

1. A Customer's extensions for commencement of service with a Request Type of DEFERRAL must be submitted on OASIS.
2. A Customer may delay its SCD either:
 - a. By submitting a Deferral TSR on OASIS at least 60 Calendar Days prior to the SCD of the Parent Reservation; or
 - b. If the SCD is less than 60 Calendar Days prior to the SCD of the Parent Reservation, the Deferral TSR must be submitted the same day the Parent TSR is CONFIRMED on OASIS.
3. The Deferral TSR must include the following:
 - a. Customer: EIR Code must match the Parent Reservation.
 - b. Request Type: DEFERRAL.
 - c. Service Type: Must match the Parent Reservation.
 - d. Point of Receipt (POR)/Point of Delivery (POD) and Source/Sink: Must match the Parent Reservation.

- e. MW Request: Must be less than or equal to the MW available capacity in the Parent Reservation.
- f. Start/Stop Date and time: Must be moved in tandem to retain duration.
- g. Related Ref: Must reference the Parent Reservation AREF number

C. Reservation Fee

1. The Customer must pay the Reservation Fee set forth in BPA's General Rate Schedule Provisions in effect at the time the Deferral TSR is submitted on OASIS.
 - a. A non-refundable Reservation Fee equal to one (1) month of Long-Term Firm PTP Transmission Service is required for the Deferral TSR that extends the SCD of the Parent Reservation.
 - b. Short Distance Discount does not apply to the Reservation Fee.
 - c. The non-refundable Reservation Fee for a Deferral reservation must be received by BPA within 30 Calendar Days of the Parent Reservation's SCD. If the 30th Calendar Day is on a Saturday, Sunday, or Federal Holiday, the Reservation Fee is due no later than the following Business Day.
 - d. Reservation Fee payment instructions:
 - i. Refer to the [How to Pay BPA webpage](#) for available payment methods.
 - ii. When making electronic payments, the Customer must include the words, "Non-Refundable Reservation Fee" in the memo field.
 - e. If the Reservation Fee is not received within the timeframe set forth above, BPA will change the OASIS status of the Deferral reservation to ANNULLED.

D. Deferral Service Offer

1. BPA will tender a signed Deferral Table to the Customer.
2. The Customer must countersign and return the Deferral Table to BPA no later than Close of Business (COB) on the 15th Calendar Day from the Date of Tender.
3. Upon receipt of the signed Deferral Table from the Customer, BPA will change the OASIS status of the Deferral TSR to ACCEPTED.
 - a. If the Deferral TSR is Preconfirmed, the status will automatically update from ACCEPTED to CONFIRMED.
 - b. If the Deferral TSR is not Preconfirmed, the Customer will have 15 Calendar Days to change the OASIS status of the Deferral TSR from ACCEPTED to CONFIRMED.
 - i. If the Customer fails to place the Deferral TSR in a CONFIRMED status within 15 Calendar Days:
 1. BPA will change the OASIS status to RETRACTED;
 2. The Deferral TSR will receive no further consideration; and
 3. The Parent Reservation will remain unchanged.

- c. If the Customer changes the OASIS status to CONFIRMED within 15 Calendar Days, BPA will:
 - i. DISPLACE or RECALL the Parent Reservation (Related Ref) on OASIS; and
 - ii. Begin the Competition analysis per the following sections.
4. If a Customer fails to sign and return the Deferral Table to BPA no later than COB on the 15th Calendar Day from Date of Tender:
 - a. BPA will change the OASIS status to DECLINED;
 - b. The Deferral TSR will receive no further consideration; and
 - c. The Parent Reservation will remain unchanged.

E. Deferral Competition

1. A Deferral Competition can be determined up to 60 Calendar Days prior to the Deferral SCD.
2. The winner of a Competition must be determined prior to performing subsequent Competitions.

F. Defender Competition Criteria

1. A Deferral Customer is hereafter referred to as the “Defender”.
2. Power Transfer Distribution Factor (PTDF) calculations are prepared for each Deferral reservation to determine whether a Challenger for the reserved capacity (MW) and/or Subgrid exist.
3. Deferral reservations will be competed in queue order and will be subject to one Competition within 30 Calendar Days of its queued date if there is a Challenger identified for that reserved capacity
4. A replacement TSR submitted by the Defender (per BPA’s competition notice in Section H.2.c) for the remaining capacity not competed in Section F.3, will not be subject to Competition.
5. The Defender’s queue time is the date/time of the Defender’s first Deferral reservation.
6. A Deferral reservation will remain CONFIRMED, if no Challenger is identified in Section G.
 - a. BPA will continue to evaluate subsequent pending LTF TSRs for potential Challengers.

G. Challenger Competition Criteria

1. A Customer that is determined to have a Competing Request is hereafter referred to as the “Challenger”.
2. A Challenger will be identified in queue order.
3. A Challenger must be eligible for reservation priority (Renewal).

4. A Challenger's SCD must be before the Defender's deferred SCD.
5. The Challenger is identified as a Long-Term Firm ORIGINAL or REDIRECT TSR in an OASIS status of STUDY in BPA's Long-Term pending queue.
 - a. A Challenger is identified if the reserved capacity to be released by the Defender, for both encumbered ATC and/or Subgrid capacity, would enable BPA to offer transmission service to the Challenger.
 - b. A Challenger will not be identified if the Competition results in a loss of revenue to BPA.
6. A Challenger may be identified even if they have a signed Cluster Study Agreement (CSA), Preliminary Engineering Agreement (PEA), Environmental Study Agreement (ESA), or an Individual System Impact Study (ISIS).
 - a. A Challenger active in one of the above agreements will have the option to decline a Competition and remain in the LT pending queue.
 - b. If a Challenger is not active in one of the above agreements and declines to compete, the Challenger's TSR will be placed in an OASIS status of DECLINED.

H. Competition Notification Process

1. If a Competition has been identified, BPA will:
 - a. Notify the Challenger by email that a Competition has been identified; and
 - b. Provide the Challenger with the details of the Competition in a Challenger Competition Notification form.
2. If the Challenger competes, BPA will:
 - a. Set the Competition Flag to "Y" in the Defender's Deferral TSR;
 - b. Notify the Defender by email that a Competition has been initiated; and
 - c. Provide the Defender with the details of the Competition in a Defender Competition Notification form.

I. Completed Competition

1. The winner of the Competition will:
 - a. Receive an offer of transmission service;
 - b. Not be able to request extensions for commencement of service per OATT 17.7; and
 - c. Retain reservation priority (Renewal) per OATT 2.2.