



PSS and OASIS User Group

September 27, 2012

1:00-2:00 EST

Dial-in and WebEx information available at www.misoenergy.org

Minutes

1. Administrative Items

The meeting was called to order at 1:00 PM and was recorded.

The purpose of the User Group meeting is to discuss the system upgrade for the Physical Scheduling System (PSS) and the system replacement of the MISO OASIS.

Participants in attendance:

AJ Miller (Ameren)
Austin Hoekman (Missouri River Energy Services)
Blair Mukanik (Manitoba/Hydro)
Cliff Risley (MISO – Seams Admin Engineer/AFC)
Eric Morris (MISO – Compliance Attorney)
Eugene Warnecke (Ameren)
Jeff Ferron (Alliant Energy)
Kelly Bertholet (Manitoba/Hydro)
Kun Zhu (MISO – Manager; Scheduling & Tariff Admin)
Len Rothenbuhler (Indianapolis Power & Light)
Mike Fones (Manitoba/Hydro)
Patricia Garwo (Alliant Energy)
Patrick ?? (?? Quebec)
Rhonda Kellerlane (?)(Alliant Energy)
Robin Chang (Ventyx)
Sally Clore (MISO)
Scott Cunningham (MISO)
Shelley Auld (MISO)
Steve Leovy (WPPI)
Tabitha Hernandez (MISO - Advisor; Scheduling & Tariff Admin)
Terry Gates (AEP)
Tim Flanagan (Energy Authority)
Tom Sandford (Alliant Energy)
Tyler Young (Manitoba/Hydro)

Participant companies in attendance:



- a. AEP
- b. Alliant Energy
- c. Ameren
- d. Energy Authority
- e. IPL

- f. Manitoba/Hydro
- g. WPPI
- h. Ventyx

Tabitha advised the group that we only have an hour and we have many topics to cover. Move the Non-Firm Hourly Deadline presentation (agenda item #4) up on agenda to be sure we get through it. MISO will be presenting it to NSC next week and will be asking the group after the presentation if everyone is comfortable with it. Tabitha also mentioned we need to be aware of the time and if it looks like we are going to run late we can schedule an additional time to meet before next month. Tabitha asked if there were any questions or concerns regarding the change of agenda; there were none. We then moved to agenda item #4 and Kun's presentation.

2. Review List of System Changes

MISO sent out the List of System Changes on Sept 21st. To date MISO has not received any questions. **Tabitha wanted everyone to be aware of Certificates – All Certificates must be OATI;** can have OATI Cert set up within a couple of days.

Questions:

Jeff/Alliant – Email comment about XML submissions, has documentation been published that Market Participants (MP) can get or if there are changes to interface with MISO/OASIS. Information will go out 90 prior to launch.

Kelly/MH – On OASIS system will there be a sandbox site. **Yes, same as demo OASIS.**

As far as documentation, **some are open to public, some need digital certificates.**

Is this a whole new generation of PSS? **This is a new enhancement, hosted at OATI instead of MISO.**

Market Part will no longer have to go into PSS to approve the use of the transmission. **Yes**

Cliff - While we maintain a manual document, the new OASIS system should allow you to query the system and pull back a live list so we won't have to update the document on an on-going basis; even though he doesn't have a list of all the things that will be like that, there are several flowgate and AFC items that will no longer be posting to the



document; you will be able to use the system to get live updates so we are looking forward to the update.

Amy - Appreciate all email documentation that has been distributed. Thank you.

Tabitha thanked everyone and encouraged everyone to send any questions via the exploder list and we will respond. Any questions can also be recapped at the next meeting.

3. FERC Filing for System GO LIVE Date

Eric Morris: To make a FERC filing you have to file 60 Days+1 before the GO LIVE date. Based on our discussions this month on the training sessions during the holiday season, the consensus of the group was that we don't want to force a 12-31 GO LIVE date, so the earliest that we could GO LIVE based on SAS16 requirements would be Monday, Feb 4th. This would require FERC Filing for a tariff update and the ability to do a lottery by Dec 5th. Will plan to get tariff changes out to this group in early November to give this group two weeks to respond back to us on the proposed tariff changes and then we would have two weeks additional to incorporate those into the tariff filing and to present those to other Stakeholder groups.

Eric asked if there were any concerns about those dates. **None heard.**

Tabitha: So just from a training standpoint, that would put the Customer training would be the 2nd and 3rd week of January (**4 separate dates**) (**with WebEx recorded 2nd part of day**) for a launch date of February 4th. Any concerns? **None heard.**

4. Non-Firm Hourly Dead Line

For a copy of the presentation, please refer to the PSS-OASIS User Group link (<https://www.misoenergy.org/Events/Pages/PSS-OASISUserGroup3.aspx>).

Tabitha brought up the presentation on the WebEx and inquired of the group to ensure everyone could see the presentation. Confirmed.

Kun mentioned that the presentation is almost identical to the one he will be giving to the Market Subcommittee next week on Tuesday. He is still working on it and mentioned that there may be additional changes but it should be very similar.

Kun mentioned that some of the group may be aware that this issue has been discussed with the Market Subcommittee (MSC) for a couple of years.



Basically, MISO right now Hourly Transmission Service is not open until the afternoon at 1300 (1PM) and it doesn't allow customers to use the Hourly product and participate in the MISO Day-Ahead Market because the Day-Ahead market closes at 1100. So there was a motion passing MSC to move the window to the morning (9AM).

The idea was passed and waiting for the new OASIS to be up and running because our current OASIS doesn't fully support the Preemption function that will result from this change.

Kun used a very simple example just to show the basic idea on what Preemption is for those who don't know. There are other rules and fact sheets you can learn from and get more information, but this simple illustration is for people who may not have heard about this.

Usually when we see a Transmission Service Request (TSR), we process it based on queue order (first come, first served). Preemption is one deviation from that NAESB requirement in that some requests of a higher priority that may have been queued later may still, what we call "Preempt"; others call it "bump" some earlier queued requests.

In this simple example, we have three (3) requests: first is an Hourly request for tomorrow with hour ending 1600; second is a request also for tomorrow for longer Hourly period with hour ending 2000 (the hours overlap with the first request but the second request is longer); and the third request is a Daily request for the whole day tomorrow. In this instance with the Hourly Non-Firms (requests 1 and 2), the duration makes the second request have more importance (not sure if this is the right word) than queued time which means that Request 2 can preempt Request 1 because of the longer duration. Additionally, Request 3 can preempt either Request 1 or Request 2 or both. But preemption only happens if there is limited capacity available. If there is plenty of capacity available, there is no preemption needed.

Now we come to the topic; the motion passed from MSC to move the window to 9AM. MISO is now proposing an alternate timing to move it to 6AM instead of 9AM the Day Prior just to allow more time for competition and also after competition ends parties impacted by competition may need time to rearrange their portfolio and also meet scheduling deadlines.

Kun referred to the presentation time chart at 11AM when the Day-Ahead Market closes. In this scenario, the requests come after 6AM and MISO confirms and issues competition. He uses the new terms "Defender" and "Challenger". The Defender is the earlier queued request that is already there when the next request comes in; the Challenger. This will be the request that came in later but has higher priority and will try and preempt the Defender. The Defender and Challenger we are talking about here are the TSR not the person.



In this case, there is a TSR that comes in around 6 or 7AM timeframe and then we need some time to review and confirm competition, issue competition to the defenders, the defender Request 1 will have a chance to decide to either Match the duration of the lower-queued, but higher priority Request 2, or withdraw the Request 1 to allow the Challenger Request 2 to be accepted.

Once competition ends, the Defender says “I will extend my request to as long as the Challenger” (called a Match); once there is a Match, the Challenger doesn’t get anything; or the Defender can say “No I don’t want to match that longer duration” and their TSR is Withdrawn and the Challenger TSR is Accepted. After that, if the Defender matched, the Challenger then has a chance to see for the portion he didn’t ??????.,

In this example, competition ends at 8 and then between 8 and 11 it is time for the Customer to re-arrange or see what other earlier transactions or remedies they can use. Scheduling wise, according to the FERC timeframe, entities (Balancing Authority (BA) and the Transmission Provider (TP)) have up to two hours to approve the schedule. So to be safe, a Day-Ahead Tag has to be submitted by 9. Usually this would not take two hours, but it could. In that regard you can see 9AM doesn’t really give sufficient time to make all this happen. MISO is recommending moving it even earlier.

Kun reviewed the Pros and Cons (on the last slide) of moving the time earlier to 6AM or keeping it at the recently passed time of 9AM.

Questions/Comments:

Goal is to present to MSC next week and hopefully get a vote or use email to vote. The worst case is we would have to wait until November which could affect our project. MISO would like to hear the customer perspective. Kun also asked for someone for each company to represent their company and make a vote.

Kelly/ Manitoba/Hydro – You are not saying you are going to release Firm transmission tagged any earlier? **NO, no change on releasing Firm.**

Amy Jo Miller, Ameron – 6AM scenario deadline to submit TSRs is by 7, competition would end by 8, results by 9

NO, this is just an example. Get close to day ahead market at 11AM, won’t allow competition because there is no time for defender to respond. There are different scenarios and response times depending on setup.

Can we assume anything with defenders and challengers and competition will be locked down by 9AM for day ahead, **YES. Hourly requests can be submitted at 6AM and competition would be OVER by 9AM, but should be submitted earlier to get it into competition in order to be OVER by 9AM.**



Please update slide presentation so that it clearly shows this. **Kun will update.**

Kun once again asked for representation at the MSC next week to be included in the voting.

We will need to ask MSC if they will entertain voting on this.

5. Questions/Concerns

Kelly/MH – As far as changes MISO is proposing and NAESB, nothing will be more restrictive than the NAESB standards, right? MISO will not be “putting their own spin on anything,” will they? **Kun – NO; Tabitha – for PSS no business rules changing besides the MP approval for the schedule.**

Tabitha - Training dates will be firmed up next month. Any questions, concerns or suggestions? Please send them to the email exploder list.

Thank you and have a great day!

6. Next Meeting

October 25, 2012, 1:00 – 2:00 EDT

Future Meetings:

November, PCM, Training Dates

December, NITS on OASIS, Simultaneous Window