**Function — Balancing**  
**Functional Entity — Balancing Authority**

**Definition**  
The functional entity that integrates resource plans ahead of time, maintains generation-load interchange-balance within a Balancing Authority Area, and contributes to Interconnection frequency in real time.

Areas that should be considered- [Reserves, frequency control, time-error correction, regulation]

**Tasks**

1. Operate and control generation, load and confirmed interchange within a Balancing Authority area.

2. Calculate area control error within the reliability area.

3. Review generation commitments, dispatch, and load forecasts.

4. Formulate an operational plan (generation commitment, outages, etc.) for reliability evaluation.

5. Approve Arranged Interchange from ramping ability perspective.

6. Implement Confirmed Interchange.

7. Operate the Balancing Authority area to contribute to Interconnection frequency.


9. Provide balancing and energy accounting (including hourly checkout of Confirmed Interchange, Implemented Interchange and Actual Interchange), and administer inadvertent energy paybacks.

10. Determine needs for reliability-related services.

11. Deploy reliability-related services.

12. Implement emergency procedures.
Relationships with Other Functional Entities

Ahead of Time
1. Receives operating and availability status of generating units and operational plans and commitments from Generator Operators within the Balancing Authority area.

2. Receives annual scheduled maintenance plans from Generator Owners within the Balancing Authority area.

3. Receives reliability evaluations from the Reliability Coordinator.

4. Receives final approval or denial of a request for an Arranged Interchange from the Interchange Coordinators.

5. Compiles load forecasts from Load-Serving Entities.

6. Develop and implement agreements with adjacent Balancing Authorities for ACE calculation parameters.

7. Submits integrated operational plans to the Reliability Coordinator for reliability evaluation and provides balancing information to the Reliability Coordinator for monitoring.

8. Confirms Arranged Interchange with Interchange Coordinators regional scheduler.

9. Confirms ramping capability with Interchange Coordinators regional scheduler.

10. Implements generator commitment and dispatch schedules from the Load-Serving Entities and Generator Operators who have arranged for generation within the Balancing Authority area.

11. Acquires reliability-related services from Generator Operator.

12. Receives dispatch adjustments from Reliability Coordinators to prevent exceeding limits.

13. Receives generator information from Generator Owners including unit maintenance schedules and retirement plans.

14. Receives information from Load Serving Entities on self-provided reliability-related services.

15. Coordinates system restoration plans with Transmission Operator.
16. Provides generation dispatch to Reliability Coordinators.

**Real Time**

17. Coordinates use of controllable loads with Load-Serving Entities (i.e., interruptible load that has been bid in as a reliability-related service or has agreed to participate in voluntary load shedding program under resource/reserve deficiency situations).

18. Receives loss allocation from Transmission Service Providers (for repayment with in-kind losses).

19. Receives real-time operating information from the Transmission Operator, adjacent Balancing Authorities and Generator Operators. [vague]

20. Receives operating information from Generator Operators.

21. Provides real-time operational information for Reliability Coordinator monitoring.

22. Receives reliability alerts from Reliability Coordinator.

23. Complies with reliability-related requirements (e.g., reactive requirements, location of operating reserves) specified by Reliability Coordinator.

24. **Verifies implementation of emergency procedures with Reliability Coordinator.**

25. Informs Reliability Coordinator and Interchange Coordinators of regional scheduler of Arranged Interchange changes (e.g., due to generation or load interruptions) involving its Balancing Authority area.

26. Directs resources (Generator Operators and Load-Serving Entities) to take action to ensure balance in real time.

27. Directs Transmission Operator (or Distribution Provider) to reduce voltage or shed load if needed to ensure balance within its Balancing Authority area.

28. Directs Generator Operators to implement redispatch for congestion management as directed by the Reliability Coordinator.

29. Implements corrective actions and emergency procedures as directed by the Reliability Coordinator.

30. Implements system restoration plans as directed by the Transmission Operator.

32. Receives information of Implemented Interchange and Confirmed Interchange curtailments from Interchange Coordinator regional scheduler.

After the Hour
1. Confirms Implemented Interchange with Confirmed Interchange provided by the Interchange Coordinators regional scheduler after the hour for “checkout.”

2. Confirms Implemented Interchange and Confirmed Interchange with adjacent Balancing Authorities after the hour for “checkout.”