Attachment AR Training Session

- Screening Studies Introduction
- How to request Long Term Service Request (LTSR) Screening Study
- How to request Delivery Point Transfer (DPT) Screening Study
- DPT and LTSR Process
- Next Steps
- Summary
- Screening Studies Website

Screening Studies Introduction

- Aggregate Study Improvement Task Force (ASITF) activities resulted in development of Screening Studies for:
  - Delivery Point Transfers
  - Long-Term Service Requests
Screening Studies Benefits

- **DPT** – Enable customers to implement DPT via issuance of a service agreement more expediently
- **LTSR** – Provide customers with a tool to determine which LTSR to pursue
- **Aggregate Studies** – Streamline process by reducing number of requests in studies

Screening Studies: General Steps

1. Customer requests Screening Study
2. SPP responds to request
3. SPP makes confirmation call (if needed)
4. SPP notifies customer of acceptance and study number(s)
5. SPP develops model
6. SPP performs MUST/PSSE analysis
Screening Studies: General Steps

7. SPP evaluates results
8. SPP prepares study reports
9. SPP posts results to OASIS
10. Customer performs OASIS maintenance
11. SPP bills and trues-up Customer costs

How to Request LTSR Screening Study
Step 1: Customer Request

- Customer enters OASIS request with statement in comment field “For Screening Purposes Only”
- Customer emails to LTSR@spp.org:
  - Executed LTSR Screening Study Agreement
  - Completed NITS application

Step 1: Customer Request

- Indicate in LTSR Screening Study Agreement
  - First choice—study type:
    - AC or DC
  - Second choice—study methodology:
    - Single customer with many requests
    - Multiple customers from same resource
    - Multiple customers from multiple resources
  - Third choice—results type:
    - Raw results
    - Written report
Single Customer with many requests

- Single study

![Diagram of POR and POD connections for a single study]

Single Customer with many requests

- Multiple single studies

![Diagram of POR and POD connections for multiple single studies]
Single Customer with many requests

- Combination

Multiple Customers from same resource

- Single study
Multiple Customers from same resource

• Multiple single studies

![Diagram showing multiple single studies]

Multiple Customers from same resource

• Combination

![Diagram showing combination]

SPP.ORG 15

SPP.ORG 16
Multiple Customers from multiple resources

- Single study

Multiple Customers from multiple resources

- Multiple single studies
Multiple Customers from multiple resources

- Combination

How to Request DPT Screening Study
Step 1: Customer Request

- Customer enters OASIS request with statement in comment field “For Existing Delivery Point Transfer Only”
- Customer emails to DPT@spp.org:
  - Executed DPT Screening Study Agreement
  - Completed NITS application
  - Attestation

Steps 2-11: DPT and LTSR Processes
Step 2: SPP Response

• Within 5 days of receipt SPP will:
  1. Notify Customer of any application deficiencies
  2. Schedule confirmation call with Customer if needed
  3. Notify Customer if deposit is required
  4. Notify Customer of estimated study cost

Step 3: Confirmation call (if needed)

• SPP and Customer will verify study choices and discuss any application deficiencies

  ➢ Failure by the Customer to provide any of the required documentation within 15 days of original request receipt shall be cause for withdrawal from the Screening Study

  ➢ Upon receipt of a successfully completed application SPP will use due diligence to complete the Screening Study within a 90 day period
Step 4: Customer Notification

- SPP assigns study number(s)
- SPP provides Customer with study number(s) and acceptance notification

Step 5: Model Development

- SPP modifies MDWG Model Set
  - Remove Proposed/Exploratory projects:
    - Generation
    - Transmission Upgrades
    - Transmission Service
  - Add SPP-approved projects (if not already included):
    - Generation
    - Transmission Upgrades
    - Transmission Service
Step 5: Model Development

- **SPP creates Scenario Base Case Models**
  - Add long-term firm transmission service commitments not included in the modified MDWG model set
    - Preexisting confirmed service
    - Service being studied in ongoing Aggregate Studies

- **SPP creates Group Transfer Case Models**
  - Apply request(s) being studied to Scenario Base Case Models

Steps 6 and 7

- **SPP performs MUST/PSSE analysis**
- **SPP evaluates results:**
  - Apply 3% transfer distribution factor (TDF) cutoff
  - Apply 0.02 per unit (pu) change in voltage to be a valid limit
  - Identify applicable Transmission Operating Directives (TOD)
  - Determine contingency validity
  - Determine appropriate upgrades and costs associated with the limitations
  - *DPT only* – Determine whether redispatch/curtailment can be offered for an already SPP-approved project
Step 8: Prepare Study Reports

- Executive summary will include:
  - Model development
  - Analysis and solution used
  - Study criteria
  - Results/limitations identified (if applicable)

- Tables will include:
  - Results/limitations identified (if applicable)
  - Associated limitation data

Step 9: Results Posted

- SPP posts results to Studies homepage
- Customer receives email notification with link
Step 10: OASIS Maintenance

- LTSR
  - SPP notifies Customer to withdraw request

- DPT
  - No Limitations or other issues to resolve
    - SPP accepts request – Customer confirms within 15 days
  - No Limitations with other issues to resolve
    - SPP works with Customer to resolve identified issue. Once completed, SPP accepts request – Customer confirms within 15 days
  - Limitations
    - SPP notifies Customer to withdraw request

Step 11: Billing and True Up

- If deposit was required:
  - If study costs less than deposit, SPP returns remainder to Customer plus interest
  - If study costs more than deposit, SPP obtains consent from Customer to exceed deposit value and continues study until complete

- If deposit was not required:
  - If study costs are less than or equal to estimated cost, SPP sends invoice to Customer
  - If study costs are more than estimate, SPP obtains consent from Customer to exceed estimate and continues study until complete
LTSR Next Steps

- Customer decides to either:
  - Enter request in Aggregate Study
  - Not pursue the request

DPT Next Steps

- If no upgrades are required (for SPP or third party), SPP will issue Service Agreements to both:
  - Customer requesting DPT
  - Original Customer

- If SPP determines there is a significant impact on the transmission system, the Customer decides to either:
  - Enter request in Aggregate Study
  - Not pursue the request
Summary

Customer Requests Screening Study → Customer selects type of study → SPP Response → Confirmation call (if needed)

Customer Notification → Model Development → Perform MUST/PSSE analysis → Evaluate Results

Prepare Study Reports → Post Results → OASIS Maintenance → Billing & True Up

Screening Studies Website

- [http://sppoasis.spp.org/documents/swpp/transmission/studies.cfm](http://sppoasis.spp.org/documents/swpp/transmission/studies.cfm)

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