**Modification of Service Reference Tracking**

NAESB WEQ 20201 Annual Plan

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| **3** | **Develop business practices standards to improve the current operation of the wholesale electric market and develop and maintain business practice and communication standards for OASIS and Electronic Scheduling** |

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| 3c) | Develop of industry business practice standards, as applicable, for identification of all modifications of service made to an original reservation in one location within OASIS |

**Background**

OASIS Business Standards allow for the modification of service. Such modifications include request types of Original, Resale, Renewal, Deferral, Redirect, Relinquish, Full\_Transfer, Part\_Transfer, and Recall. In addition, the Request Type templates for each type of modification contain a data element that refers to the reservation being modified – the Parent/Child relationship. However, this link only exists for one generation – identifying one generation of modification (the Child/Parent link).

There are certain restrictions on the types of modifications that may be made to certain existing confirmed reservations, i.e a Resale reservation cannot be transferred. Valid modifications to the standard request types are noted below:

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| --- | --- | --- | --- | --- | --- |
| **Request Type** | **Redirect?** | **Resale?** | **Part\_Transfer?** | **Full\_Transfer?** | **Parent Ref** |
| Original | Y | Y | Y | Y | N/A |
| Redirect | Y | Y | Y | Y | RELATED\_REF |
| Resale | Y | Y | N | N | REASSIGNED\_REF |
| Recall | N | N | N | N | RELATED\_REF |
| Part\_Transfer | Y | Y | Y | N | REASSIGNED\_REF |
| Full Transfer | Y | Y | Y | Y | REASSIGNED\_REF |
| Renewal | Y | Y | Y | Y | RELATED\_REF |
| Relinquish | N | N | N | N | RELATED\_REF |
| Deferral | N | N | N | N | RELATED\_REF |

The purpose of 2021 API 3c is to provide visibility into the “family tree” of a given, confirmed reservation in a single display. It is important to note that this information currently exists and readily available, but only for one generation back in the current displays.

**Simple transaction flow involving an Original and 2 modifications of service**

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| --- | --- | --- | --- | --- | --- |
| **Trans #** | **ARef** | **Request\_Type** | **Start** | **Stop** | **Comments** |
| 1 | 696725 | Original | ?? | 2009-06-01 | Could not retrieve from OASIS Archive |
| 2 | 1597755 | Renewal | 2009-06-01 | 2021-06-01 | Renewal w/Rollover Rights |
| 3 | 16006725 | Redirect | 2010-06-01 | 2021-06-01 | Redirect to End-of-Term |

**Transaction #1 - ARef 696725**

This was an Original Request that started the transaction flow. As an Original Request, no Related or Reassigned ARef was needed. Once Confirmed, it became a long term reservation with Rollover Rights. Note that I could not retrieve this reservation from the OASIS Archive

**Transaction #2 ARef 1597755**

This was a Renewal of ARef 696725. Note that it carries a Related reference of the parent reservation:



**Transaction #3 ARef 1600613**

This is a Redirect of the Renewal reservation after it had run for one year – this Redirect going to the end of term. Note that this Redirect carries a Related reference to its parent – the Renewal, not the original.



While this is a very simple transaction flow, the options available to a Transmission Customer can continue to “daisy-chain” for sometime (aka the Zerfing Effect).

The goal of this request is to allow visibility of the multi-generational relationships between related/reassigned reservations. Ideally, one could submit a given reservation and the system would return it’s “Multi-Generational Family Tree.”

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| --- | --- | --- | --- |
| **Reservation in Question** | **Type** | **Predecessor** | **Predecessor Type** |
| 1600613 | Redirect | 1597755 | Renewal |
| 1597755 | Renewal | 696725 | Original |
| 696725 | Original | None |  |