

Introduction

The intent of this Guideline is to provide the Merchant Alert Protocol (MAP) as an efficient communication protocol. Load-Serving Entities and Purchasing-Selling Entities (Merchants) can use this protocol to exchange information regarding issues that could impact the reliable operation of the Bulk Electric System. Approved uses of MAP are for Alerts related to primary communication (phone) and e-Tagging system outages, or when there is a concern that an entity may not have sufficient resources to meet its obligations.

This guideline is not intended to replace or interfere with the process for declaring capacity and energy emergencies via Energy Emergency Alert (EEA), as described in NERC Standard EOP-002-2 – Capacity and Energy Emergencies. Instead, MAP can be used prior to declaring an EEA to prevent the necessity of declaring an EEA. In addition, MAP can be used after an EEA has been declared to assist the merchant in returning to pre-EEA conditions.

While use of MAP is strongly encouraged, the election of its use is voluntary. However, Merchants who choose to use the protocol are expected to follow this guideline as presented and only for the purpose of communicating information regarding outages of primary communication or e-Tagging systems or for procuring energy to avoid or remedy an energy emergency.

Merchants should also note that resource owner/operators may require the use of MAP (or some similar communication method) to demonstrate that the market has been exhausted before access to emergency resources can be made available.


Guideline

As with all issues that could potentially affect reliability, clear and frequent communication between Merchants and their host Balancing Authorities (BA) is critical. Prior to the initiation of MAP, any requesting Merchants are expected to contact their BA(s) to describe the problem and to provide notification that a Merchant Alert will be issued. After this communication occurs, the decision to proceed with MAP rests solely with the Merchant.

Merchant Alert Process

- Merchant with access to webSmartOASIS:
 1. Determines that a Merchant Alert is necessary.
 - a. Merchant notifies host BA of intent to issue a Merchant Alert before proceeding.



2. Accesses the webSmartOASIS Common Western Energy Bulletin Board:
 - a. Select the “Misc” button on the webSmartOASIS toolbar.
 - b. Selects the “Bulletin/Merchant Alerts” button.
 - c. Select the Add Bid/Offer/Alert icon  in the upper right of the display
 - d. Merchant enters the following required information into the template:
 - i. Contact information (name)
 - ii. Select Type: Alert
 - iii. Start/End date and time (required fields)
 - iv. Point of receipt/point of delivery (POR/POD) — although this information would not be necessary for outages of primary communication or e-Tagging systems, a POR/POD is required for the Alert to be submitted
 - v. Optional comments, if any, but do not include either a price or quantity when initiating an Alert for the purpose of procuring energy to avoid or remedy an energy or capacity emergency
 - vi. Reference Number (optional)
3. Submit the Alert
 - a. webSmartOASIS software issues:
 - i. A unique visual and audible alarm to all currently logged-in webSmartOASIS users. Alarm settings must be configured in webSmartOASIS to receive alarms.
 - ii. An email with the subject heading “Merchant Alert” is sent to all mailboxes that are linked to the Peak RC Reliability Messaging Tool. The body of the email will contain all information from the template.
 - iii. Direct emails will be sent to merchants who have requested to be provided this form of communication.

- iv. The Peak RC Reliability Messaging Tool forwards Merchant Alert email from webSmartOASIS to the Market and Reliability email group
- Merchant without access to webSmartOASIS bulletin board:
 1. Determines that a Merchant Alert is necessary.
 2. Contacts the host BA. Merchant requests the BA to issue, on the Merchant's behalf, a Merchant Alert via the Peak RC Reliability Messaging Tool the Market Reliability email group. Merchant provides BA with the information listed below.
 - a. Contact information.
 - b. POR/POD. This information would not be required for outages of primary communication or e-Tagging systems.
 - c. Date and start/stop time.
 - d. Optional comments, if any, but do not include either price or quantity when initiating an Alert for the purpose of procuring energy to avoid or remedy an energy or capacity emergency.
- Note: In this circumstance, the final decision on issuing the Merchant Alert rests solely with the BA.
- A merchant receiving the Merchant Alert who has excess resource capability, and is willing to provide assistance, directly contacts the requesting merchant to negotiate terms.
 - All information exchanged via this process is stored and retained for at least one year.

Merchant Alert Testing

To help ensure proper functionality of the Merchant Alert process, tests will be conducted on a regular basis. Under normal conditions, these will be performed no less than four times per year (quarterly) and no more than twelve times per year (monthly). The "Comment" field of the Alert will clearly state that a test is being conducted. The frequency of these tests as well as who will conduct each test will be determined by the WECC Market Interface Committee or by other means as required to maintain continued operations. The timing of these tests will be coordinated with the Reliability Coordinators.

Note: This process will be reviewed at least once every two years by a team assigned by the WECC Market Interface Committee.

Approved By:

Approving Committee, Entity or Person	Date