



WECC Interchange Tool (WIT) Checkout Guidelines

ATFWG

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WECC Interchange Tool (WIT) Checkout Guidelines

Introduction

This guideline is to ensure that Balancing Authority (BA) personnel are correctly using the WIT as required in the INT-021-WECC-CRT-2.1 for their respective roles. The WIT shall be the primary means to confirm Net Scheduled Interchange (NSI) for Preschedule checkout based on the WECC Preschedule Calendar, next-hour checkout (from current operating hour), current-hour checkout upon change, past-hour checkout in current day, and past-day checkout. Each BA shall also use the WIT as the primary means to acknowledge agreement of Net Actual Interchange (NAI) for past-hour checkout in the current day and past-day checkout.

Applicable users of this guideline are:

- Balancing Authorities
- Transmission Service Providers
- Preschedulers
- Real-time Operators
- After-the-Fact (ATF) Personnel

Purpose of Checkout

Per the WECC Interchange Criterion and specifically, per NERC Reliability Guideline – Inadvertent Interchange, BAs should be checked out at the end of the day, and After-the-Fact should be checked out by the end of the next business day on NAI and NSI. Each BA must verify that the total Imports and Exports match between the WIT and their own Energy Management System or energy accounting system. NSI, NAI, and Inadvertent must also be verified and in agreement.

Each user type has a defined role in the checkout process. Applicable roles and their related access level in the WIT are shown below. Each user-type’s responsibilities for checkout will be discussed in this document.

Optional User Role Setup

Preschedule	Real-time	After-the-Fact
View set to WECC Preschedule Calendar	View set to current day	View set to last month
Default to “Daily” view in Interchange Summary	Default to “Daily” view in Interchange Summary	Default to “Monthly” view in Interchange Summary
Automatic Refresh On	Automatic Refresh On	No Automatic Refresh
No Actual Interchange displayed	Actual Interchange displayed	Actual Interchange displayed
Don’t change time frame of displayed data on refresh	Forced refresh every hour to move the sliding window forward each hour	Don’t change time frame of displayed data on refresh



WECC Interchange Tool (WIT) Checkout Guidelines

Please see the WIT User Guide for further detail on User Roles

- Path: Misc > Help > WIT > WIT User Guide

Preschedule – NSI

See the WIT User Guide, Section 6.1, Interchange Summary.

At the end of each business day, Preschedulers shall check out each hour with their adjacents¹ for the applicable preschedule day(s) using the Interchange Summary in the WIT.

- Path: Scheduling > Interchange > Interchange Summary
- Filters:
 - Checkout: select BTF
 - ADJ Data: check box
 - Schedule: check box
- Top Grid Display: The hourly NSI should match the hourly Uploaded NSI from your own energy accounting system.
 - Mark the NSI check box for each hour where the NSI (WIT values) matches the Uploaded NSI (your own system values).
- Bottom Grid Display: Your schedules (top row of hourly values) should match your adjacents' schedules (bottom row of hourly values).
 - Mark the checkbox for each hour where your schedule value matches your adjacents' schedule value. If all 24 hours are in agreement, mark the Total checkbox in place of the individual hours. (All hours will be checked at once by marking the Total checkbox.)
- Click on "Apply Checkout" button when you have marked all appropriate checkboxes. To verify your checkout status with your adjacents' checkout status, change the Checkout filter to "View." When both parties have "checked out" a particular hour, double checkmarks are displayed next to that hour. If only one party has performed the checkout, a single checkmark is displayed next to the hourly value.
- All parties should be checked out with their adjacents prior to the close of the preschedule day.

Real-time – NSI

See the WIT User Guide, Section 6.1, Interchange Summary.

In the WIT, Real-time Operators shall check out the next hour with their adjacents using the Interchange Summary in the WIT.

¹ Adjacent Balancing Authority: A Balancing Authority Area that is interconnected another Balancing Authority Area either directly or via a multi-party agreement or transmission tariff. Glossary of Terms Used in NERC Reliability Standards, updated April 20, 2010



WECC Interchange Tool (WIT) Checkout Guidelines

- Path: Scheduling > Interchange > Interchange Summary
- Filters:
 - Checkout: Select BTF
 - ADJ Data: check box
 - Schedule: check box
- Top Grid Display: The hourly NSI should match the hourly Uploaded NSI from your own energy accounting system).
 - Mark the NSI checkbox after each hour where the NSI (WIT value) matches the Uploaded NSI (your own system value).
- Bottom Grid Display: Your hourly schedule value (top row of hourly values) should match your adjacents' hourly schedule (bottom row of hourly values).
 - Mark the checkbox after each hour where your scheduled value matches your adjacents' scheduled value.
- Click on "Apply Checkout" button when you have marked all appropriate checkboxes.
- To verify checkout status with your adjacents' status, change the Checkout filter to "View." When both parties have "checked out" a particular hour, double checkmarks are displayed next to that hour. If only one party has performed the checkout, a single checkmark is displayed next to the hourly value.

Real-time – NAI

See the WIT User Guide, Section 6.1, Interchange Summary.

In the WIT, at the end of the hour, Real-time Operators shall check out the hourly NAI with their adjacents using the Interchange Summary in the WIT.

- Path: Scheduling > Interchange > Interchange Summary
- Filters:
 - Checkout: select NAI
 - ADJ Data: check box
 - Actual: check box
- Top Grid Display: The NAI for your BA is displayed on an hourly basis.
 - Mark the NAI checkbox after each hour when you are in agreement with your adjacents' NAI.
- Bottom Grid Display: Your hourly actual value (top row of hourly values) should match your adjacents' hourly actual value (bottom row of hourly values).
 - Mark the checkbox after each hour where your actual value matches your adjacents' actual value.
- Click on "Apply Checkout" button when you have marked all appropriate checkboxes.



WECC Interchange Tool (WIT) Checkout Guidelines

- To verify the checkout status with your adjacents' status, change the Checkout filter to "View." When both parties have "checked out" a particular hour, double checkmarks are displayed next to that hour. If only one party has performed the checkout, a single check mark is displayed next to the hourly value.

After-the-Fact – NSI

See the WIT User Guide, Section 6.1, Interchange Summary.

In the WIT, by the end of the next business day, ATF shall verify that schedules have been checked-out for the prior day(s) with their adjacents using the Interchange Summary in the WIT. If any discrepancies exist, ATF will work with adjacents to resolve.

Please note: Although Preschedule and Real-time perform checkouts, it is necessary for ATF to review past days in the event dynamic tags have changed or meter adjustments were made.

- Path: Scheduling > Interchange > Interchange Summary
- Filters:
 - Checkout: select ATF
 - ADJ Data: check box
 - Schedule: check box
- Top Grid Display: The hourly NSI should match the hourly Uploaded NSI from your own energy accounting system.
 - Mark the NSI check box for each hour where the NSI (WIT values) matches the Uploaded NSI (your own system values).
- Bottom Grid Display: Your schedules (top row of hourly values) should match your adjacents' schedules (bottom row of hourly values).
 - Mark the checkbox for each hour where your schedule value matches your adjacents' or, if all 24 hours are in agreement, mark the Total checkbox.
- Click on "Apply Checkout" button when you have marked all appropriate checkboxes.
- To verify checkout status with your adjacents, change the Checkout filter to "View." When both parties have "checked out" a particular hour, double checkmarks are displayed next to that hour. If only one party has performed the checkout, a single checkmark is displayed next to the hourly value.

ATF Discrepancy with Adjacent and ATF Tags

- If ATF finds a discrepancy with an adjacent, the adjacents must discuss to determine the nature of the discrepancy and whether an ATF tag is warranted.
- ATF tags are used only to correct a discrepancy between the current schedule and what actually occurred.
- ATF tags can only be processed up to 168 hours (seven days) in the past.



WECC Interchange Tool (WIT) Checkout Guidelines

- All parties must agree to the conditions of the ATF tag.
- Once the ATF tag is processed and implemented, it is necessary to check that the change was made in the WIT, as well as your own energy accounting system.
- If an e-Tag needs to be taken to a lower value, the “WECC Schedule Change Request Form” must be completed, signed by all involved parties, and e-mailed to:.

WECC SCHEDULE CHANGE REQUEST FORM Please send this completed and signed form to disputereports@wecc.biz							
	Date D-M-Y	HE	Time Zone	Tag	Current MW Schedule	Requested MW Schedule	Reason
1	6/24/2010	10	PPT	BPAT_BCTCATF6222_NWMT	15	0	Duplicate RSH tag created in error, please zero schedule.
2							
3							
4							

Source BA:	BPAT	Sink BA:	NWMT
Responsible ATF Name:	Sheryl Welch	Responsible ATF Name:	Amy Lubick
Signature:	<i>Sheryl Welch</i>	Signature:	<i>Amy Lubick</i>
Date:	6/29/2010	Date:	6/29/2010
Intermediary BA		LSE BA:	
Responsible ATF Name:		Responsible ATF Name:	
Signature:		Signature:	
Date:		Date:	

After-the-Fact – NAI

See the OATI WIT User Guide, Section 6.1, Interchange Summary.

In the WIT, by the end of the next business day, ATF shall verify that actuals have been checked out for the prior day(s) with their adjacents using the Interchange Summary in the WIT. If any discrepancies exist, ATF will work with adjacents to resolve.

Please note: Although Preschedule and Real-time perform checkouts, it is necessary for ATF to review past days in the event meter adjustments were made.

- Path: Scheduling > Interchange > Interchange Summary
- Filters:
 - Checkout: select NAI
 - ADJ Data: check box



WECC Interchange Tool (WIT) Checkout Guidelines

- Actual: check box
- Top Grid Display: The NAI for your BA is displayed on an hourly basis.
 - Mark the NAI checkbox after each hour when you are in agreement with your adjacents' NAI.
- Bottom Grid Display: Your hourly actual value (top row of hourly values) should match your adjacents' hourly actual value (bottom row of hourly values).
 - Mark the checkbox after each hour where your actual value matches your adjacents' hourly value or, if all 24 hours are in agreement, mark the Total checkbox.
- Click on "Apply Checkout" button when you have marked all appropriate checkboxes.
- To verify checkout status with your adjacents' checkout status, change the Checkout filter to "View." When both parties have "checked out" a particular hour, double checkmarks are displayed next to that hour. If only one party has performed the checkout, a single check mark is displayed next to the hourly value.

Mismatch Summary

See the OATI WIT User Guide, Section 6.3, Mismatch Summary.

- Mismatch Summary can be a useful tool to see whether your schedules and actuals are out-of-balance with your adjacents' schedules and actuals.

Tie Data Changes

See the OATI WIT User Guide, Section 6.8, Tie Data.

- Path: Scheduling > Interchange > Tie Data
- Set the appropriate filter parameters via drop down boxes.
- Adjustments must be made within 168 hours (seven days). If more than 168 hours has passed, you must provide a comment noting the reason for the change.
- Updates can only be done up to 62 days in the past.
- Click on individual meter value and enter appropriate meter adjustment in box. The cell will become "pink" to indicate that a manual change has been made. You may also click on the Ⓢ just below the hour column header to adjust a single hour's value.
- If multiple hours require adjustment, select "In Out" under the MWh column and enter appropriate adjustment to each applicable hour, then select apply.

Monthly Inadvertent and Month-End Meter Adjustments

See the OATI WIT User Guide, Section 7.32, Monthly Inadvertent.

Month-end NAI values are derived from hourly Actual Interchange Telemetered Values (hourly MWh data accumulated by telemetry, telephone, direct meter readings, etc.) but can be adjusted to include month-end Actual Interchange Register Meter readings. Adjacent BAs may mutually agree on



WECC Interchange Tool (WIT) Checkout Guidelines

alternative methods for reconciling month-end NAI discrepancies. However, these alternative methods shall not delay the submittal of balanced month-end NAI values for Inadvertent Interchange Summary reporting purposes.

- Adjacent BAs shall mutually agree on the distribution of the Actual Interchange Register Meter adjustments between on-peak and off-peak periods.
- If the Adjacent BAs cannot mutually agree on the distribution of the Actual Interchange Register Meter adjustments, the total adjustment will be multiplied by 0.57 to determine the on-peak adjustment and by 0.43 to determine the off-peak adjustment.

NOTE: Meter Adjustments must be coordinated with your adjacent BA and input into the WIT before the last upload to the Consortium for Electric Reliability Technology Solutions on the 15th of the next month. If you are unable to accomplish this, you must enter these adjustments in the following calendar month (e.g., Actual Interchange Register Meter Reading adjustments for January will be included in the February month-end NI values).

- Path: Inadvertent > Monthly Inadvertent
- Hourly, Monthly and Cumulative Inadvertent numbers should match the BA's own energy accounting system.
- Click on * next to the adjustment value in the Net Actual MWh column.
- Enter the appropriate on-peak and/or off-peak value for the appropriate BA.
- Click Enter to save any values entered.
- Some BAs choose to enter month end meter adjustments (On-Peak and Off-Peak) on an actual day through Tie Data. The adjustment is entered in a meter adjustment account set up in the BA's Home system well as in the WIT. This method is similar to Tie Data Adjustments discussed above.

Note: If you normally do your checkout in Pacific Time and report in Central time, you would make adjustments in both time zones as the adjustment does not automatically carry through to all time zones.

Audit Information

See the OATI WIT User Guide, Section 9, Audit Information.

The WIT has several different types of audit information for reference.

- Path: Scheduling > Audit
- General Audit Trail
 - System events not specific to a schedule event.
- Scheduling Audit Trail
 - Events specific to a schedule.
- Tie Data Audit Trail



WECC Interchange Tool (WIT) Checkout Guidelines

- Events specific to Tie Data.
- WIT Validation log
 - Warnings and errors generated by e-Tags failing WIT Validation.
- WIT reporting to the Consortium for Electric Reliability Technology Solutions (CERTS):
- Balancing Authority Schedules and Actuals are reported to the NERC reporting tool, CERTS, on a monthly basis.
- All BAs must be in balance by the 15th day of the following month.
- Adjustments may be made in the WIT up to the 15th day of the following month. During this time, changes made in the WIT will automatically upload to the CERTS tool. After the 15th, WIT BA Data Administrator and Open Access Technology International, Inc. (OATI) personnel must make any changes and a manual upload to CERTS is necessary.

WIT reporting to the Consortium for Electric Reliability Technology Solutions (CERTS)

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- Adjustments may be made in the WIT up to the 15th day of the following month. During this time, changes made in the WIT will automatically upload to the CERTS tool. After the 15th, WIT BA Data Administrator and OATI. personnel must make any changes and a manual upload to CERTS is necessary.

