WESTERN POWERPOOL



Western Resource Adequacy Program

401 New Participant Onboarding

400 – Auxiliary

Revision History

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401 New Participant Onboarding

1. Introduction

The New Participant Onboarding Business Practice Manual (BPM) consists of three sections. The Application and Registration section outlines the activities to occur in conjunction with the execution of a Western Resource Adequacy Program (WRAP) Agreement (WRAPA), which initiates Participant involvement in the WRAP. The WRAP Administration section describes the process by which new Participants are incorporated into WRAP committees and receive Participant resources. The WRAP Program Implementation section describes activities necessary to begin involvement in the Forward Showing Program and Operations Program.

1.1. Intended Audience

BPM 401 is intended for entities in the process of or considering joining the WRAP. BPM 401 is particularly useful for individuals who will be responsible for Participant implementation and participation in various aspects of the WRAP, including but not limited to the Resource Adequacy Participant Committee (RAPC), Forward Showing Program, or Operations Program.

1.2. What You Will Find in This Manual

BPM 401 includes three main sections: Application and Registration, WRAP Administration, and WRAP Program Implementation.

1.3. Purpose

BPM 401 provides guidance for new Participants that are being onboarded into the WRAP and for interested entities to gather information and start preparing for potential future onboarding.

1.4. Definitions

All capitalized terms that are not otherwise defined in BPM 401 have the meaning set forth in the Tariff or in another BPM.

Forward Showing Demonstration: As defined in *BPM 108 Forward Showing Submittal Process*.

Participant Technology Solutions Overview (PTSO): Document produced by the Program Administrator and Program Operator that provides Participants an overview of the technical details necessary to set up, implement, and test WRAP systems.

Program Signatory: A class of corporate membership in the WPP, as defined in the bylaws of WPP.

Request Management System (RMS): As defined in *BPM 101 Advance Assessment*.

2. Application

Any Load Responsible Entity applying to participate in the WRAP must execute the WRAPA as set forth in Attachment A of the Tariff.

2.1. Summer Onboarding Window

Entities who execute WRAPAs for summer onboarding participate in the following Summer Season as their first Binding Season. WRAPAs are to be executed by incoming Participants no later than August 1. Regardless of a signing date after January 1 but prior to September 15, new Participant WRAPAs become effective on August 1, except when FERC by order has established a different effective date for a non-conforming WRAPA.

2.2. Winter Onboarding Window

Entities who execute WRAPAs for winter onboarding participate in the next Winter Season as their first Binding Season. WRAPAs are to be executed by incoming Participants no later than January 1. Regardless of a signing date after August 1 but prior to January 1, new Participant WRAPAs become effective on January 1, except when FERC by order has established a different effective date for a non-conforming WRAPA.

The winter onboarding window will be available for WRAPAs (or non-conforming WRAPAs) signed before January 1, 2028. Unless RAPC takes an affirmative vote to retain this window, BPM 401 will be modified to remove the winter onboarding window. If RAPC does take an affirmative vote to retain the winter onboarding window, this paragraph will be removed and the winter onboarding window content will remain. Alternatively, if RAPC takes an affirmative vote to remove the summer onboarding window but retain the winter onboarding window prior to January 1, 2028, such changes will be made to BPM 401.

Table 1 shows the general timeline of activities to be expected by an incoming Participant from signing a WRAPA, registering loads and resources though a limited data request (see Section 2.2) and completing its first Forward Showing Submittal, through to its first Binding Season participating in the Operations Program, and its first

Forward Showing Submittal using Qualifying Capacity Contribution (QCC) derived from data turned in at its first Advance Assessment.

Table 1. New Participant Entry Timeline

Activity/Milestone	Description	Summer Onboarding	Winter Onboarding
WRAPA Signing Deadline	Participants execute WRAPA (Attachment A in Tariff) for participation in (T-0) Operations Program. Participants may sign before this date.	August 1 (T[1]-1)	January 1 (T)
Effective WRAPA Date	All new participant WRAPAs will be effective on same date	August 1 (T-1)[2]	January 1 (T)
Payment of Cash Working Capital Support Charge	Tariff Schedule 1 details the calculation of the Cash Working Capital Charge	August 30 (T-1)	January 30 (T)
Registration with Program Operator RMS	Participants provide information to Program Operator to gain access to RMS	August 1-31 (T-1)	January 1-31 (T)
Deadline for New Participant Limited Data Request for Registration of Resources and Loads	Participants complete an initial limited Data Request to inform approximated QCC values	August 15 (T-1)	January 15 (T)
First FS Deadline	Participant will complete a FS Submittal for the following Binding Season (Summer for summer onboarding and Winter for winter onboarding); this showing will necessarily include some class	October 31 (T-1)	March 31 (T)

[1] In BPM 401, T refers to the Year in which the first Binding Season in which a new Participant participates begins. T-x refers to the Year that is x Years before T, and T+x refers to the Year that is x Years after T.

[2] For non-conforming WRAPA's the effective date is August 1, January 1, or the date established by FERC in an order accepting the non-conforming WRAPA.

	average QCC values (from (T-2) Advance Assessment) for resources claimed		
Deadline for First Advanced Assessment data submittal	Participant submits data for modeling future Monthly Forward Showing Planning Reserve Margins (FSPRMs) and QCCs (see BPM 101)	March 1 (T)	March 1 (T)
Operations Program Testing	Participant engages in testing during the shoulder season between two Binding Seasons	March 15 – May 31 (T)	September 15 – October 31 (T)
Second FS Deadline	Participant will complete a FS Submittal for their second Binding Season (Winter for summer onboarding and Summer for winter onboarding); this showing will necessarily include some class average QCC values for resources claimed	March 31 (T)	October 31 (T)
First Operations Season	Participant will begin Operations Program participation (uses, in part, inputs from FS Submittal from First Summer FS Deadline)	June 1 – September 15 (T)	November 1 (T) – March 15 (T+1)
Participant completes FS Submittals and participates in Operations Program as specified in the Tariff; participation will necessarily utilize some class average QCC values for resources claimed on FS Submittal for an additional one to two Binding Seasons			
Summer FS Deadline	Participant will complete a FS Submittal for the following Summer Season; this showing will be the first using QCC values for resources Participant turned in at its first Advance Assessment (T-0)	October 31 (T+1)	October 31 (T+1)

Table 2 is an example timeline for a Participant executing a WRAPA prior to August 1 in 2024.

Table 2. Example New Participant Summer Onboarding Timeline

Activity/Milestone	Deadline	Year
WRAPA Signing Deadline	August 1	2024
Effective WRAPA Date	August 1	2024
Payment of Cash Working Capital Support Charge Due Date	August 30	2024

Registration with Program Operator RMS	August 1-31	2024
New Participant Limited Data Request Deadline	August 15	2024
First Summer FS Deadline	October 31	2024
Deadline for First Advanced Assessment data submittal	March 1	2025
Operations Testing	March 15 – May 1	2025
First Winter FS Deadline	March 31	2025
First Operations Season	June 1 – September 15	2025
Participant completes FS Submittals and participates in Operations Program as specified in the Tariff; participation will necessarily utilize some class average QCC values for resources claimed on FS Submittal for an additional two Binding Seasons		
Summer FS Deadline	October 31	2026

Table 3 is an example timeline for a Participant executing a WRAPA after August 1 in 2024.

Table 3. Example New Participant Winter Onboarding Timeline

Activity/Milestone	Deadline	Year
WRAPA Signing Deadline	January 1	2025
Effective WRAPA Date	January 1	2025
Payment of Cash Working Capital Support Charge Due Date	January 30	2025
Registration with Program Operator RMS	January 1-31	2025
New Participant Limited Data Request Deadline	January 15	2025
Deadline for First Advanced Assessment data submittal	March 1	2025
First Winter FS Deadline	March 31	2025
Operations Testing	September 15 – October 31	2025

First Summer FS Deadline	October 31	2025
First Operations Season	November 1 – March 15	2025-2026
Participant completes FS Submittals and participates in Operations Program as specified in the Tariff; participation will necessarily utilize some class average QCC values for resources claimed on FS Submittal for an additional Binding Season		
Summer FS Deadline	October 31	2026

The vast majority of Participants will execute a *pro forma* WRAPA as set forth in Attachment A of the WRAP Tariff. A Participant may also join with a non-conforming version of the WRAPA, provided that the Participant's circumstances conform to FERC's standards for non-conforming agreements and the non-conforming WRAPA is approved by FERC.

- Summer onboarding: Any non-conforming WRAPA developed between the new Participant and WPP must be submitted to FERC by June 1 such that FERC approval could be granted and the non-conforming WRAPA could become effective by the August 1 deadline. Participants seeking a non-conforming WRAPA must notify WPP of such a need by providing a proposed draft non-conforming WRAPA for WPP consideration at the earliest opportunity and no later than May 1.

- Winter onboarding: Any non-conforming WRAPA developed between the new Participant and WPP must be submitted to FERC by November 1 such that FERC approval could be granted and the non-conforming WRAPA could become effective by the January 1 deadline. Participants seeking a non-conforming WRAPA must notify WPP of such a need by providing a proposed draft non-conforming WRAPA for WPP consideration at the earliest opportunity and no later than October 1.

2.3. Election of Transition Binding Seasons

Any Participant whose WRAPA becomes effective before September 15, 2026, shall give notice of its elected first Transition Binding Season according to the processes provided in *BPM 109 Forward Showing Transition Period*.

The Binding Season beginning November 1, 2027, will be the first Binding Season for all Participants whose WRAPA is effective by September 15, 2026. Transition Period

provisions will continue to apply according to the guidelines provided in *BPM 109 Forward Showing Transition Period*.

2.4. Registration of Resources and Loads

Each Participant must register all resources and loads, regardless of whether such resources will be used to satisfy WRAP requirements and whether certain loads will be subject to the requirements of the WRAP. Participants will submit and may modify their registration of resources and loads in accordance with the procedures and timelines set forth in *BPM 101 Advance Assessment*, *BPM 103 Forward Showing Capacity Requirements*, and *BPM 105 Qualifying Resources*.

If more than one Participant attempts to register the same resource or load, the following procedure will be used to assign the resource or load to a Participant:

- If a Participant attempts to register a resource or load that has already been registered by another Participant, the resource or load will remain registered by the original Participant until both Participants mutually inform WPP in writing that a change to the registration is required.
- If two or more Participants attempt to register the same resource or load during the same window, the Program Administrator will request the Participants determine among themselves the appropriate registration of the resource or load before that resource or load is included in the WRAP.

The treatment of resource registration for immediate participation in the WRAP is discussed further in Section 4.1.1.

2.5. Cash Working Capital Support Charge

A Participant shall pay a Cash Working Capital Support Charge as described in Schedule 1 of the Tariff by the time required under Schedule 1.

2.6. Membership in WPP

WPP is a 501(c)(6) membership organization with corporate members. Program Signatory membership is granted to any Load Responsible Entity participating in a WPP-facilitated reliability program such as the WRAP. Participants must complete a member intake form – located on the WPP website – within 60 Days of executing a WRAPA (or non-conforming WRAPA).

3. WRAP Administration

Upon execution of a WRAPA, a new Participant shall gain access to WRAP committees and sub-committees as appropriate, as well as Participant resources.

3.1. Committee Involvement

WPP will provide incoming Participants with information about all active committees and workgroups that a new Participant is eligible to join, including discussion about expected time commitment and responsibilities for committee members. The incoming Participant shall provide names and contact information for the committees and workgroups in which it is required to or elects to participate.

3.1.1. RAPC Representation

Upon entry, new Participants must designate and provide to WPP the contact information of a representative to serve on the Resource Adequacy Participant Committee (RAPC).

The RAPC is the main venue for Participants to engage in program implementation and compliance, as well as being the highest form of Participant engagement in the governance and decision making of the WRAP. Additional information on the eligibility of individuals to serve, the role of RAPC representatives, and the designation of informational representatives can be found in the RAPC Charter located on the WPP website.

3.1.1.1. Forward Showing and Operations Program Workgroups

New Participants shall also designate contacts for the Forward Showing and Operations Program workgroups. Participants are required to select a primary contact for each workgroup and may elect to designate additional informational contacts.

3.1.1.2. Other RAPC Workgroups

Additional workgroups may be active under the RAPC at the time of Participant entry. Incoming Participants shall be notified of active supplementary workgroups and may choose to provide WPP with contact information of individuals who wish to participate.

3.1.2. Program Review Committee and Nominating Committee

The Program Review Committee (PRC) is generally responsible for receiving, considering, and proposing changes to the WRAP design. Per the Tariff, the PRC is composed of 20 representatives from 10 sectors – four sectors are composed solely of Participants. Upon execution of a WRAPA, the PRC shall be notified of new Participant(s) entry. Additionally, the contact information of the appropriate PRC sector

representative(s) will be shared by WPP with the incoming RAPC representative(s), and vice versa. Additional information on the PRC, its role, and the composition of sectors can be found in the PRC Charter on the WPP website.

The Nominating Committee (NC) is responsible for nominating new directors to the WPP Board. The NC is composed of 12 sectors, four of which are composed of Participants. Upon execution of a WRAPA, the same introductions shall take place as those required of the PRC.

3.2. Participant Resources

Upon execution of a WRAPA, WPP will provide incoming Participants with resources for program onboarding, including but not limited to:

- WRAP educational materials;
- Information regarding WRAP committee involvement and stakeholder engagement;
- Information to understand WRAP compliance obligations; and
- The PTSO and information on IT support.

4. WRAP Program Implementation

Prior to submitting a Forward Showing (FS) Submittal and beginning the Operations Program registration process, an incoming Participant must select modeling assumptions that best describe its business practices. These assumptions determine whether all resource and load information will be in a single or multiple groupings, as further described in the PTSO.

WPP will assign Participants to an appropriate Subregion per *BPM 102 Forward Showing Reliability Metrics*.

4.1. Forward Showing Program

Upon execution of a WRAPA, an incoming Participant will immediately engage in WRAP activities. Timelines for Advance Assessment and Data Submittal, as well as FS Submittal and Cure Period deadlines for Summer and Winter, can be found in *BPM 101 Advance Assessment* and *BPM 108 FS Submittal Process* respectively.

4.1.1. Approximating QCCs

An incoming Participant shall complete a limited Data Request to determine class average QCC values for resources it is unable to self-evaluate (see Section 4.1.2) and register loads and resources (as discussed in Section 2.2). A new Participant's resources will be assigned 100% of the class average of all registered resources of the same resource type, taking into account location where appropriate (see the discussion of late registered resources in *BPM 105 Qualifying Resources*), but unlike late registered Qualified Resources for existing Participants there is no limit on the amount of resources assigned average QCC values for a new Participant's first four FS Submittals (two Summer, two Winter).

To facilitate the process of documenting their Resource QCCs as well as preparing for the next applicable Advance Assessment, new Participants will complete a limited Data Request based on the requirements outlined in *BPM 101 Advance Assessment*, including non-Storage Hydro Qualifying Resources, Demand Response program data, and Historical Load Data. Participants have until October 1 to complete this request.

4.1.2. Calculating QCCs

For select resources, Participants will calculate their own QCCs prior to the FS Deadline. These resources include Storage Hydro, Demand Response, and thermal resources that are not subject to NERC GADS requirements (non-GADS thermal units). The methodologies for calculating these resource QCCs can be found in *BPM 105 Qualifying Resources*.

4.2. Operations Program

An incoming Participant will begin participating in the Operations Program during the Summer Binding Season the year following its execution of the WRAPA. Participants shall complete registration and testing in advance of participation in the Operations Program. For additional details on registration, Operations Program Testing, and connectivity testing, refer to the PTSO.