

	Business Practice	Function:	External Affairs
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1 PURPOSE

This Business Practice clarifies the roles and responsibilities of the entities involved with the construction of new and/or the modification of existing Local Balancing Authority (“LBA”) Area Metering boundaries within the ATC footprint.

2 SCOPE AND APPLICABILITY

This Business Practice is applicable to all Local Balancing Authorities, Load Serving Entities, Local Distribution Companies, Generator Owners and other Interconnected Entities that have facilities connected to the ATC Transmission System.

LBA Area Metering Boundaries at existing interconnection locations may be modified by the LBA or the Interconnected Entity from time to time. In these situations, there may not be ATC capital work associated with an LBA Area Metering Boundary change. Examples of this may include:

- Existing behind the meter generation executes an agreement for network service with ATC for the purpose of participating in the MISO Market.
- Existing load executes an agreement with ATC to obtain network service.
- Changes in the ownership of load serving entities or generation.

In these circumstances, no ATC Project Team is established. As such, the applicable ATC Regional Manager is responsible for coordinating and sharing the information about the LBA Area Metering Boundary change from the Interconnected Entity to the LBA. A six (6) month notice of the metering change is recommended so the LBA resources can be deployed effectively. Early involvement by the Regional Manager ensures that the LBA Area Metering Boundaries are established in the appropriate manner.

When a new interconnection or a modification to an existing interconnection facility occurs then ATC will likely be required to initiate Capital Work and a Project Team will be established. ATC will coordinate and facilitate project updates and planning discussions with all applicable Local Balancing Authorities and Interconnecting Entities as appropriate. It is ATC’s expectation that the Interconnection Entity shall consider LBA metering at the onset of a proposed project and communicate with the appropriate parties during the development of the project. ATC will make every effort to put the entity in contact with the applicable LBA. ATC will utilize Project Teams to accomplish the coordination and facilitation of these LBA metering discussions. The ATC Project Team shall use the Checklist for the LBA Metering/Intertie Process located in Appendix A to ensure a consistent method is used to complete the LBA Metering process on ATC projects. This is to ensure proper notification and to assist in the forecasting of capital budgets based on specific project equipment needs.

Discussion topics for the ATC Project Teams include, but not limited to:

- Project schedule and scope,
- Project milestones,
- Determination of local balancing authority boundaries impact on project scope, schedule and budget,
- Metering point locations,
- Design standards,
- Equipment ownership, and
- Cost responsibilities for communication links.

The need for construction of new, or modification of existing Local Balancing Authority metering boundaries within the ATC footprint may be driven by any of the following requests:

1. Generator – Transmission Interconnections
2. Transmission – Distribution Interconnections
3. Transmission – Transmission Interconnections
4. Transmission System Reconfigurations

5. Balancing Authority initiated LBA Boundary reconfigurations

All new interconnection requests will be reviewed to consider the following topics:

2.1 COMMUNICATION

The ATC Project Team will facilitate discussions between ATC, the Interconnecting Entity and the appropriate Local Balancing Authorities to ensure that the impacted entities are aware of the Local Balancing Authority Area boundary metering and other metering issues surrounding the interconnection.

2.2 REQUIREMENTS AND OBLIGATIONS

The Interconnecting Entity and the Local Balancing Authority are expected to coordinate with ATC in the development and installation of the LBA Metering facilities. The metering arrangements for any Local Balancing Authority Area boundary modifications must be communicated to and reviewed by ATC.

2.3 MODELING AND SYSTEM MODIFICATIONS

ATC will coordinate with MISO (Midcontinent Independent System Operator, Inc., as well as the affected Local Balancing Authority), on any modeling issues and/or updates that may result from system modifications.

2.4 COST OBLIGATIONS

Any cost incurred for the design, purchase, installation, and/or relocation of the balancing authority metering equipment associated with the addition of or the modification to the LBA Metering at an interconnection shall be the responsibility of the following interconnecting entities:

1. Generation – Transmission Interconnections: Interconnecting Generator
2. Transmission – Distribution Interconnections: Company installing the Distribution Facilities
3. Transmission – Transmission Interconnections: Each applicable Local Balancing Authority is responsible for their own costs. Note: ATC is not a Local Balancing Authority.
4. Transmission System Reconfigurations: Entity initiating the system reconfiguration
5. Local Balancing Authority initiated LBA Boundary Area Reconfigurations: Requesting Local Balancing Authorities

3 ROLES AND RESPONSIBILITIES

- **ATC Project Manager:** The person assigned by ATC to assemble and lead the ATC Project Team to complete the assigned project scope.
- **ATC Regional Manager:** ATC Regional Manager who is responsible for coordinating and sharing the information about the LBA Area Metering Boundary change from the Interconnected Entity to the LBA. This person is the regional manager assigned responsibility for managing contact and issues with applicable LDC.
- **ATC Project Team:** A group of individuals from the necessary ATC (and possibly outside entities) functional groups assembled by the ATC Project Manager to complete the assigned project scope. (See item 1 in appendix A for a typical list of ATC Project Members).

Meeting minutes will be distributed to all entities involved with the project by the ATC Project Manager.

ATC will provide outputs from instrument transformers (CTs/VTs) owned by ATC and connected to the ATC transmission system for use by the Local Balancing Authority or interconnected entity, where applicable. If the metering point is located outside of ATC's area of ownership, then ATC will not own the instrument

transformers.

LBAs will be responsible for the design, installation, and ownership of the LBA metering, telemetry and communications equipment.

The location of local balancing authority area boundaries will be negotiated between the respective Local Balancing Authorities and will be communicated to ATC.

The Local Balancing Authorities are responsible for providing LBA metering and RTU specifications to ATC consistent with requirements of the ATC project schedule. The ATC Project Team determines where the equipment will physically be located within the ATC control house. The ATC Project Team will provide an overall schedule for the substation's construction and completion. During the ATC sponsored periodic coordination meetings, the Local Balancing Authority or Interconnection Entity is expected to provide updates on their RTU and metering equipment installations to all Parties.

The ATC Project Team is responsible to ensure that ATC and the Local Balancing Authority receives notice from the Interconnecting Entity when the metering and RTU equipment is ready to be energized. The Interconnecting Entity shall inform both ATC Operations and the Local Balancing Authority of the proposed schedule to energize the equipment.

The Interconnecting Entity and the associated Local Balancing Authority will be responsible for the on-going maintenance of their equipment.

ATC will retain the right to review and/or audit, any metering arrangements for Local Balancing Authority Area boundary metering installations.

ATC maintains a BA database which consists of all known BA ties between LBAs within ATC's territory. This database shall be referenced by the ATC Project Team to identify any potential LBA that may be impacted by a project, including an LBA who may not have initiated the project. The communication and coordinating with the impacted LBA(s) will be conducted as defined within this document. If the result of the project changes the LBA boundary definition the BA database will be updated to reflect this change. On occasion, typically annually, ATC will conduct a review of the BA database and coordinate this effort with the relevant LBAs. This coordination will be led by the ATC Regional Manager.

4 BODY

4.1 DEFINITIONS

ATC Transmission System: The facilities owned by ATC, subject to the administration of the MISO, that are used to provide energy market, transmission, energy, and ancillary reserves market, interconnection services or wholesale distribution service under the MISO FERC Electric Tariff.

Balancing Authority: The responsible entity that integrates Resource plans ahead of time, maintains Load-generation balance within a Balancing Authority Area and supports the Eastern Interconnection frequency in real time.

Customer: Any authorized local distribution company that proposes a new or modified load Inter-connection with ATC's Transmission System at a nominal voltage level of ≥ 50 kV.

ERO: The organization certified by the Commission to establish and enforce reliability standards for the bulk-power system, subject to FERC review.

FERC: The Federal Energy Regulatory Commission or its successor.

Interconnecting Entity(ies): Any applicant(s) that has (have) entered into an interconnection agreement with ATC to interconnect a generator facility or substation to the ATC system.

Intertie Metering: Balancing Authority Area Metering (also called interconnection metering)

– is a system that comprises the instrument transformers, metering devices and associated communication equipment that monitor the exchange of power and energy between two Balancing Authorities, or between the transmission system and local distribution companies or generation sources.

Local Balancing Authority: An operational entity or Joint Registration Organization, as defined in the NERC Rules of Procedure, which is (i) responsible for compliance to NERC for the subset of NERC Balancing Authority Reliability Standards defined in the Amended MISO Balancing Authority Agreement for their local area within the MISO Balancing Authority Area, (ii) a Party to this the Amended MISO Balancing Authority Agreement, excluding MISO, and (iii) shown in Appendix A to the Amended MISO Balancing Authority Agreement.

Local Balancing Authority Metering Boundary: The seam (meter Boundary) between two Local Balancing Authorities (LBA's).

Reliability Standards: Those standards promulgated and approved by NERC as the ERO, or any Regional Entity authorized to do so, as ratified and approved by the FERC that are applicable to ATC and the Customer.

MISO: The Midcontinent Independent System Operator, Inc. is the Regional Transmission Organization that administers the MISO FERC Electric Tariff and provides transmission and energy market services over the transmission facilities of its transmission- owning members (including ATC) in interstate commerce.

Midwest FERC Electric Tariff: The MISO FERC Electric Tariff under the terms of which open access transmission, energy and operating reserves market and interconnection services are offered, as filed with the FERC, and as amended or supplemented from time to time, or any successor tariff.

NERC: The North American Electric Reliability Corporation or its successor organization.

Transmission System: The facilities owned by ATC subject to the administration of the Midwest ISO that are used to provide energy market, transmission service or wholesale distribution service under the Tariff.

4.2 EXAMPLES OF THE NEED TO CHANGE THE LBA AREA METERING BOUNDARIES

ATC gets notified of a LBA metering change, new substation, different substation owner, new generation interconnection, existing customer requests NITS service, new substation constructed in an area outside existing LBA area, etc.

Not all of these examples may generate the need for an ATC Project Team to be formed and in those cases the applicable ATC Regional Manager is responsible for coordinating and sharing the information about the LBA Area Metering Boundary change from the Interconnected Entity to the LBA. This may also include scheduling meetings between the new customer, the LBA and ATC to ensure the proper steps are discussed and taken by all parties to make the necessary changes to the LBA metering for the new project or change.

5 ADDITIONAL INFORMATION

Supporting documents for any Local Balancing Authority Area boundary modifications may include the following:

1. Generator – Transmission Interconnection Agreement
2. Transmission – Distribution Interconnection Agreement
3. Transmission – Transmission Interconnection Agreement
4. Forming Party Agreement Regarding System Operating Procedures
5. Metering and RTU design information from the LBA

6 DOCUMENT REVIEW

This business practice will be reviewed and revised as necessary no less than every three years.

7 RECORDS RETENTION

Documents are maintained per the Records Retention Schedule.

Records Management Index System (RMIS)

Records Management Policy #2002-2 Revision Information

8 REVISION INFORMATION

In this "Revision Information" section, provide a timeline summary of all documents revisions, with the most recent revision shown first.

Revision	Role	Name and/or Title	Summary of Changes	Last Revised
00	Author(s)	Unknown	New document	05-09-2005
01	Author	Rick Czajka	-Updated document to reflect current practices. -Added Appendix A to provide a checklist to support the BA Metering / Intertie Process	08-31-2012
02	Author	Rick Czajka	-Updated to new Template Format -Added TD Interconnection Checklist to Appendix A	05-15-2017
03	Author	Matt Waldron	-Format updates -Eliminated transmission system configuration subcategories -Added process to maintain BA data	12-13-2019
04	Author	Trevor Stiles	New logo	11-28-2023

Revision Approval

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Appendix A – ATC Guide for LBA Transmission Load Interconnections

Purpose: When a new load interconnection is requested or there is a change in LBA, the Interconnected Entity shall contact American Transmission Co, through the appropriate Regional Manager. The Regional Manager shall then follow the steps below. For projects that involve capital work, please refer to the Coordination of LBA Metering Boundary Modifications Business Practice. The intent of this document is to provide the same structure for non-construction projects.

1. ATC Regional Manager shall contact the LBA as soon as possible and schedule a meeting with all parties to discuss the metering needs, costs and schedule; to ensure everyone is working together with the same plan and timelines.
 - For existing interconnection locations with no ATC Capital Work, notification to the LBA should be accomplished no later than six (6) months prior to the intended LBA Area Metering Boundary change.
 - For new interconnections or modifications to existing interconnection facilities, ATC will establish a Project Team to define the ATC scope of Work and coordinate with the LBA via the Project team,
2. The LBA Project Team will consist of representatives from ATC Customer Relations and Subject Matter Experts (SME) (as appropriate), the affected Local Balancing Authority (LBA), Interconnected Entity (IE) and/or any known affected entity.
3. ATC, the IE and the LBA will review the ATC System one-line drawings to see if existing Intertie and/or LBA metering is being affected by the project. ATC, the IE and LBA will also review the project scope to see if new LBA metering or new Intertie metering is required.
4. The IE shall enter into appropriate agreements with the affected LBA.
5. The LBAs are responsible for providing LBA metering and RTU specifications and will be coordinated with ATC if applicable.
6. The IE and the LBA is responsible for providing ATC and each other notice when the metering and RTU equipment is ready to be energized. Any changes to the energization schedule by any party should be communicated to the Project Team in a timely fashion.
7. ATC will coordinate with MISO, as well as the affected LBA, any modeling issues and/or updates that may result from system modifications.
8. Responsibility for any cost incurred for the design, purchase, installation, and/or relocation of the LBA metering equipment associated with an Interconnection project is outlined in Section 2.4 of the Scope and Applicability Section of the Coordination of LBA Metering Boundary Modifications Business Practice.
9. It is the responsibility of the Project Team ATC member to ensure the BA database is updated to include any changes to the LBA and/or Intertie metering information that was made due to the project. Additionally, any BA metering equipment connected to ATC CT's should be included in the SELD database.