

Prior Day Gas Changes

Training Module

How to resubmit nominations and PDAs after the gas day has ended.



Table of Contents

Important Information – Please Read	3
Introduction	4
Business Rules	4
Creating a Prior Day Nomination	5
Nominations Page to Submit Retros	
Notes on RRIDs	
Customer Notification When a Retro is Submitted	7
To View/Approve/Reject Retro Requests	7
Non-Operators	7
Operators	9
Customer Notification When a Retro is Scheduled	9
Creating a Prior Gas Day PDA	10
Viewing Results of a Prior Gas Day PDA Change	
Verifying Results of Prior Gas Day Changes	
FAQs	

Important Information – Please Read

The information provided herein is for informational purposes only and does not modify any provision in Transco's FERC Gas Tariff. If a conflict exists between this information and Transco's FERC Gas Tariff, the provisions in Transco's FERC Gas Tariff apply. Transco makes no representation or warranty as to the completeness or accuracy of this information. Transco shall not be liable for any informational errors, incompleteness, or delays, or for any actions taken in reliance on this information.

To review the tariff language specific to any topic, go to <u>Transco's Informational Postings page</u>, and select **Tariff** from the left-hand navigation menu.

Introduction

A Prior Gas Day change, generally referred to as a "Retro," is a process where nominations and/or PDAs are resubmitted after a gas day has ended. In essence, the gas volumes at a location are scheduled and allocated differently than the original gas day.

Business Rules

- Retros can be submitted for prior gas day changes for a current production month up to the second calendar day or 1st business day of the following month, whichever is later. The retro must be scheduled (after obtaining all approvals) by the 5th of the next month.
- 2) Retroactive changes not made within the month can be resubmitted in a subsequent month, up to seven months from the original flow month. The same business rules will apply in future periods as the original retro month.
- 3) Prior month retros may be submitted in 1Line for processing in the current accounting month until the last day of the month. After the last day of the month, any prior month retro changes may not be submitted until after the month's allocations close (as posted on 1Line, generally by the 5th of the next month).
- 4) The same business rules apply to the retro scheduling process as they do during the ID2 cycle (e.g., throughput constraints, MDQ validation, capacity constraints, pool balancing, etc.).
- 5) Retros are evaluated using the business rules mentioned above even if all parties have not yet submitted their approval.
- 6) All affected parties must agree to the retro in order for the retro to be scheduled; however, approval of the retro by all the affected parties does not guarantee that the retro will be scheduled. The retro is still subject to the evaluation process.
- 7) Nomination increases at a location will not be scheduled if the total nominated volumes for a point are greater than the physical measured volume at the point.
- 8) Zero retro nominations that have not been previously scheduled will automatically be approved by 1Line if the shipper and operator are the same BA.
- 9) Retro transactions that are submitted during processing, will be held in queue until the next processing time. Retro run times are: 8:00 am; 11:15 am; 3:00 pm; and 9:15 pm.

Creating a Prior Day Nomination

Nominations Page to Submit Retros

Select: Navigation > Nominations > Nomination > Retrieve Nominations > Create/Edit/Create >

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(Nomination Prepared) > Validate.

The path for a retro nom is much the same as the path used to create a nom for the current day or a future date. The primary difference is that the **Actions > Retro Submit** path is used to submit the nom and a comments box appears after the Retro Submit has been selected.

Agents may submit or approve a retro only if they were an agent on the original gas flow date <u>and</u> are still an agent on the **retro submittal** and **approval dates**.

Comment	×
Submit GD 9/1 retro	
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Select: Actions > Add after entering the desired comments and the retro nom is then submitted. A blue message will indicate that the retro nom has been submitted successfully. A **Retro Request ID**

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(RRID) will be assigned, and the **Retro Status** will be **Pending**. The RRID identifies the submitted retro and can be used to enter with any other retro nom or PDA that should be scheduled together.

Notes on RRIDs

- Retro nominations submitted for a **date range** will have a **separate RRID** for each day.
- RRIDS are provided in 1Line informational emails and online to identify retro transactions.
- A hyperlink to the Retro Request List page is available on the actual RRID or status displayed on any page.

To group retro nominations and/or PDAs together so that they must all be scheduled together, the RRID field of subsequent retro noms or PDAs should be filled in with the same RRID that was assigned upon submittal of the first retro request of the group.

For example, assume a retro change is needed on a scheduled nomination to change only the downstream contract. Two retro requests can be submitted to make this change: (1) a retro nomination taking the volume of the original down to zero, and (2) a retro nomination with the original volume and correct downstream contract.

On the second retro nomination, the RRID from the first retro can be copied into the RRID field on the new nom. This way, the shipper does not risk losing the volume he had previously scheduled since the nominations will be scheduled together.

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Customer Notification When a Retro is Submitted

This is an example of the automatic notification that affected parties will receive when a retro nom has been submitted. All customers should have their contact information up- to-date to ensure that they are notified of any retro activity. Emails related to retro changes are sent to customers with the Retro Request Notice and Retro Reminder roles. The email contains the assigned RRID so customers can track the retro.

To View/Approve/Reject Retro Requests

Non-Operators

Once a retro nomination has been submitted, the next step is to make sure all affected parties approve the retro. All **non-operators** will approve/reject the retro request from the **Retro Request List** page.

1) Select: Navigation > Retro Request Lists>Retro Request List

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2) Fill in desired filters and select Refresh.

To view the list of the parties required to approve the retro noms, click the + to expand the list to show all approval stops. All impacted parties may not be initially identified until after the nightly Retro Scheduling Run.

The Retro Status is initially **Pending**.

The retro process will **validate** noms for MDQ and check to see if the Nom/PDA is operationally feasible. If an **error** is detected, a "Y" will be displayed in the **Error** column. To get more information about the error, hover over the "Y".

Impacted parties (non-operators) may **approve or reject retros** from this page. Select the box for your approval line and select **approve** or **reject**.

Operators

Operators must go to the **desired confirmation level** of the **Confirmations** page to approve or reject a retro request.

- 1) Select Navigation>Nominations>Confirmations>Desired Confirmation Level
- 3) Enter the appropriate flow Date and Location, select Retro cycle and **Refresh**.
- 4) Zero noms will be auto confirmed when the shipper is the operator as long as it is not an existing nom being reduced to zero.
- 5) The request(s) available for approval is the transaction(s) with an RRID number under the Retro Request ID Column.
- 6) Highlight the row, right click for the menu, and select **Approve Retro Confirmation**.
- 7) A comment box will pop up, type in comment, and select Add.

If a RRID needs to be rejected, then you can select **Reject Retro Confirmation**, type in a comment, and select **Add**.

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Customer Notification When a Retro is Scheduled

Once all necessary approvals are submitted and there are no errors in the validation process, the request will be processed in the following retro run. If scheduled, the status will change from **Pending** to **Scheduled**.

Below is an example of an **email notification** that the affected parties will receive once the retro has been scheduled. Customers should **check their results** using the tools under <u>Verifying Results of Prior</u> <u>Gas Day Changes</u>.

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Creating a Prior Gas Day PDA

As with current business, making a retro change to the Allocation method resets all PDAs for that date/location. PDA changes to prior gas flow dates can be made from the Transaction Level (or last level confirmed) on the Confirmations page. Click on the **Show all PDAs** checkbox, and then revise the necessary Allocation method and/or the Ranks, Percentage or OPV.

The **Show Only Retro** checkbox can be selected to only display retros at the location.

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A retro PDA is submitted by selecting **Actions > Submit PDAs**. In the above example, the Operator changed the Allocation Method from Percentage to OPV and the rank is also changed so that ABC Producer takes the swing.

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Once submitted, a success message indicates that the Allocation Method was saved. The page updates with the new Ranks and a **PDA Retro Request ID** is assigned.

The Retro request list page(**Navigation>Retro Request >Retro Request list**) shows that the retro request was automatically approved for the submitter(operator). The Transportation Service Review stop will also be auto approved.

Other impacted parties may be identified when the retro scheduling run process completes.

The PDA RRID is in **Pending** status, until the next run of the Retro Scheduling Cycle.

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The next Scheduling Run for the retro cycle may identify other parties impacted by the PDA change and they must submit their approval. Parties who are not operators (3rd parties) will approve or reject the PDA change from the above Retro Request List page. The Projected column with the asterisk hyperlink



on the Retro Request list will provide more information to the reallocated parties by showing current allocation and projected allocation if the retro is scheduled. 3rd party reallocation can utilize this tool to make a decision on approving or rejecting the retro. Below is an example.

* The indicated quantity reflects the potential allocation change the final volume. If you have any questions, please contact your location	at may result from the requested retro activity. This result may not reflect the on operator.
Current	Projected
1,369	2848 *
<	>
	Close

Once all parties agree, the RRID in the Retro Status column will show Scheduled as the status.

Viewing Results of a Prior Gas Day PDA Change

Before reallocation due to prior gas day PDA change:

Dir Flo 🗘	Loc Prop	Up ID Prop	Upstream Entity Name	Up K 🍦	Svc Req Prop	Svc Req Name 🏮	Svc Req K Ç	Dn ID Prop	Downstream Entity Name	Dn K 🔶	Scheduled Quantity	Allocated Quantity _	Package ID _	TT Desc 🏮
R	1000105	66001	66001/EF G Corp Energy	ABC COMPANY	990002	ABC Producer	3000001				150	1,369	RETRO NOM ABC	CURRENT BUSINESS (TRANSPORTA TION)
R		530513	66001/EF G Corp Energy	530513	990008	PAM CORP	1006490				182	1,661		PLANT THERMAL REDUCTION

After reallocation due to prior gas day PDA change:

The results of the PDA change can be verified on the **Allocated Quantities** page. Notice the change between the allocated volumes by switching from Percentage to OPV.

Contact Per		912		Statement D	ecipient Name ate/Time: ransaction Typ	09/10 æ Code: 9R	02 Company /2014 16:30 //B M2579	>		Beg End Stat	ounting Period: inning Flow Date: ing Flow Date: ement Basis: ection of Flow:		Ŀ	COLLAPSE A	
Retrieve tal Quantities	Clear)												COLLAPSE	
	Total Measu	ired: 3,030		Total Receipt Scheduled: 332 Total Delivery Scheduled: 0 Net Scheduled: 332						Total Receipt Allocated: 3,030 Total Delivery Allocated: 0 Net Allocated: 3,030 Total Barrels Allocated: .00					
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R	1000105	66001	66001/EF G Corp Energy	ABC COMPANY	990002	ABC Producer	3000001				150	2,848	RETRO NOM ABC	CURRENT BUSINES (TRANSPOI TION)	
R		66001	66001/EF G Corp Energy	530513	9900008	PAM CORP	1006490				182	182		PLANT THERMA REDUCTIO	

Verifying Results of Prior Gas Day Changes

The Scheduling Runs for the Retro cycle are: 8:00 am; 11:15 am; 3:00 pm; and 9:15 pm. The results of retro changes will be available on the Review/Select Scheduling Runs after processing. All storage or balances pages and reports will be updated in the afternoon (generally between 2 and 4 PM).

Results or status of a retro can be viewed on the pages or reports listed below:

1Line Pages

- Retrieve Nominations set filters to: Retro Status: Scheduled, and cycle: Retro.
- PDA view level at which the last PDA change was made, or at Transaction level.
- Allocated Quantities
- Storage > Inventory Balances
- Pool Balancing Summary and Pool Balancing Details
- Balances > Monthly Summary
- Scheduling>Scheduling Runs by Contract

1Line Reports

- Scheduled Quantities (SQR) generate from the Report Request page with Cycle: Retro
- Shipper Imbalance Statement (part of Invoice Packet)
- Shipper Imbalance Daily Statement
- Daily Location Allocation
- Allocation Audit LDC
- Storage Statement
- Pool Party Report

FAQs

1. My retro has been approved by all parties, so why is it still in pending status?

- The retro may have been approved by the parties after the retro batch completed.
- If storage activity is involved, the daily afternoon storage batch job will need to be completed before the retro batch process will update the storage activity. These will generally be picked up by the retro batch during the storage batch job.
- There may be another retro nomination that is in pending status at the same location as your retro. Your Commercial Services Rep can check this for you.
- 2. I submitted a retro to reallocate volumes between two activities on the same contract, and the retro was rejected on the Retro Request List page because of a constraint. Where can I see details of why my retro was cut?

Check the results of the scheduling run for the Retro cycle for all the activities that were being requested for the change. One of the activities may be flowing on a secondary FT basis or a new activity may have been inadvertently created causing a problem with the MDQ.

3. I am a shipper and when I checked the Retro Request List page yesterday after I submitted the retro, the stops were all approved, but my retro is still in pending status. How can I find out what is holding up my retro?

Check the Retro Request List page again. When the retro process runs, additional impacted parties could have been identified and added to the Routing Activity list. Each impacted party will receive an email notifying them that a retro request requires their attention. Another reason can be that your RRID is tied to a pending RRID. For instance, if your retro is pulling out of a pool, there could be other retros that need to be approved and pass pool validations before the retro schedules. Please contact your Commercial Service Rep for assistance.

4. I submitted my nom late yesterday and it was rejected last night before the operators had a chance to approve it. They both agreed before I submitted the request that they would approve it, and when I submitted it, it passed the online validations. Why was it rejected?

The nom validation from the 1Line page verifies only that the data elements in the nomination are valid. The validation is for the submitted nom only, not for all of the transactions within a segment that the scheduling engine validates. When requests are processed by the Retro Scheduling cycle run, the nomination is validated to determine whether the retro can pass through a capacity constraint and contract MDQ limits. If it is not feasible due to an MDQ issue or a capacity constraint, the request will be rejected.

5. Last month I was the nominating agent, and I am trying to submit a retro request but 1Line will not allow me to do so.

Agents may submit or approve a retro only if they were an agent on the original gas flow date and are still an agent on the retro submittal and approval dates. If you are no longer the agent, you cannot submit nominations even though you were an agent for the gas flow date that the retro covers. The Service Requestor will have to submit the retro request.

Please contact your Commercial Services Representative with any Retro questions.