



MISO Project Database – Project Submittal and Update Instructions

Project Reporting Guidelines

MISO BPM-020 Transmission Planning Section 4.2.3 describes project reporting guidelines for submitting projects into MISO Transmission Expansion Planning (MTEP) study process.

Instructions

Please provide all updates and project submittals to the MISO Project Database using the Planning Portal web tool:

<https://markets.midwestiso.org/MTEP/>

Access to the Planning Portal requires the use of a digital certificate that has been registered to a specific portal user account. To request this certificate, contact the Local Security Administrator (LSA) for your member entity (Transmission Owner or Market Participant). If you do not know your LSA, or if you do not know how your company has registered its Entity Code or NERC ID with MISO, contact MISO Client Relations (clientrelations@misoenergy.org) or 866-296-6476 Option 3. Note that a Universal NDA and CEII NDA are required to access the site.

Request a portal user account that includes Transmission Planning role Submit rights. Your LSA will find this role on LSA Create/Update User pages. Certain individuals may only need View access, which may be requested as appropriate via the LSA Create/Update User Pages using the View role checkbox.

A training manual has been created to assist Portal users with the project update and creation process. You may view the training manual (.pdf format) on the MISO website: [Home](#) → [Stakeholder Engagement](#) → Training → Customer Training → Level 100 → [Level 100 – MTEP Planning Portal.pdf](#).

A spreadsheet project submittal form is ONLY available for submission of market participant funded projects by market participants without MTEP portal access.

Please contact MISO Expansion Planning with any questions or access issues.

General Rules

A project is a group of one or more facilities which comprise a system upgrade. Facilities are created within the confines of the project page, so the system will automatically link the project and facilities together. A project should address a related group of system needs and must be able to be operated without adversely impacting the transmission system.

The Project IDs and Facility IDs are assigned automatically by the MTEP Planning Portal system. These IDs are associated with specific projects and specific facilities.



If a project to address a specific system need is replaced with a new project, the former project should be withdrawn and the new project submitted. A cancellation reason for the withdrawn project should be provided and should indicate an alternative project is to be implemented. If a project retains a majority of its components, then some changes to the project are appropriate and should be made at the facility level to change, add or withdraw specific facilities. If the termination points or location of a facility are changed, the old facility should be withdrawn and a new one submitted. If a future substation at the same location goes through name changes, the same Facility ID may be used with a note in the Comment field for documentation. Note that the Planning Portal system will only allow specific fields to be adjusted *after* the project is approved by MISO Board of Directors and placed into Appendix A.

How the Project Database Differs from MTEP Appendix A

The MTEP Planning Portal project database contains projects and facilities at all stages of the MTEP process. MTEP Appendix A is a listing of the MISO Board of Directors approved expansion plan projects that is produced annually. Therefore, some projects in the project database may not be reviewed and approved as part of an MTEP.

MISO Contact Information

Expansion_Planning@misoenergy.org



Field Use Quick Reference

The MTEP Planning Portal contains pop-up help windows on both the Project and Facility information pages that appear when the mouse hovers over the field name. These help windows describe how each field is used, who is responsible to populate the fields, and whether the field is required, optional or if it is confidential. As a quick reference, a few fields of note are discussed below.

Project Information Page Fields of Note

The Project Information Page contains information that is common to all facilities which comprise a project and enables project level reporting.

- *Project Name* – The name for this project. Preferably the same name used internally or in regulatory proceedings. A short name.
- *Project Description* – A concise description of the project's transmission system upgrades. For example: Substation_D to Substation_E 345 kV line (new), Substation_E to Substation_F 138 kV line reconductor, Substation_E 345/138 kV transformer (new).
- *System Need* – A concise description of the Transmission Issues which the project addresses. For example, "Sub A to Sub B 345 kV outage causes Sub X to Sub Y 138 kV line to overload to X% of 210 MVA emergency rating." Transmission service, generator interconnection network upgrades, maintenance, or market efficiency issues should be indicated as appropriate. System Need is public and should not contain Critical Energy Infrastructure Information (CEII)
- *Target Appendix and Requested Cycle* – These two fields indicate the submitter's proposal for which MTEP cycle the project should be reviewed in and what MTEP report Appendix A or B it may be in. For example, target appendix "A" and requested cycle "MTEP15" for projects that should be reviewed and approved in MTEP15.

Facility Information Page Fields of Note

The Facility Information Page contains information about a project's facilities. The facility information should be near model building level of detail. That is, if a project builds a new line with four line sections between substations, the facilities list should contain a branch entry for each of the four line sections.

- *Facility Type* – Select from a dropdown list of facility types to describe the upgrade. Enter only one type of facility per facility record.
- *Description* – This field describes the nature of the upgrade. This information is to help model builders confirm correct changes are made to models. Examples: new line, remove model branch, reconductor line, converted 69 kV line to 115 kV operation, new transformer, replace transformer #1, replaced wave trap, added distribution substation.
- *Planning Status* – Planning status must be selected from the dropdown menu. Possible status options include the Planned, Proposed, Under Construction, In-Service or the most recent Milestone achieved.



- *There are four project status reporting fields* on the facility information page that are outlined in a red box. That information is Transmission Owner confidential and only available for MISO staff to review. This information is only required for facilities >\$50 million.