MyQuorum – Imbalance Trades and Storage Transfers

May 2023

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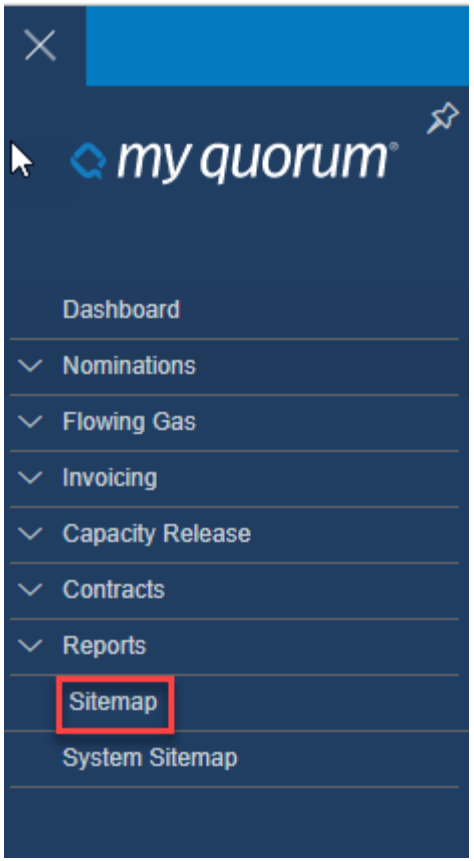
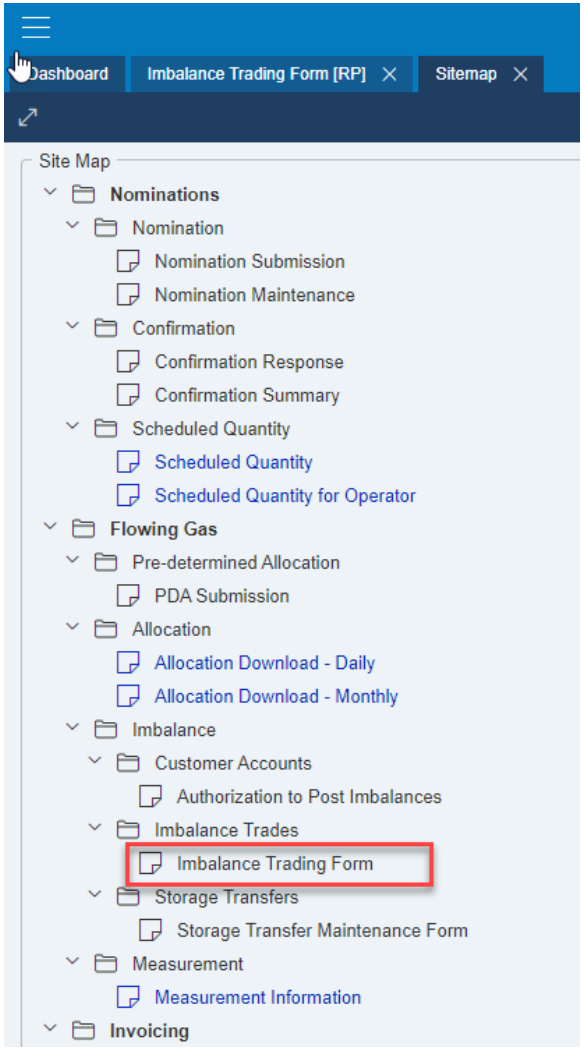
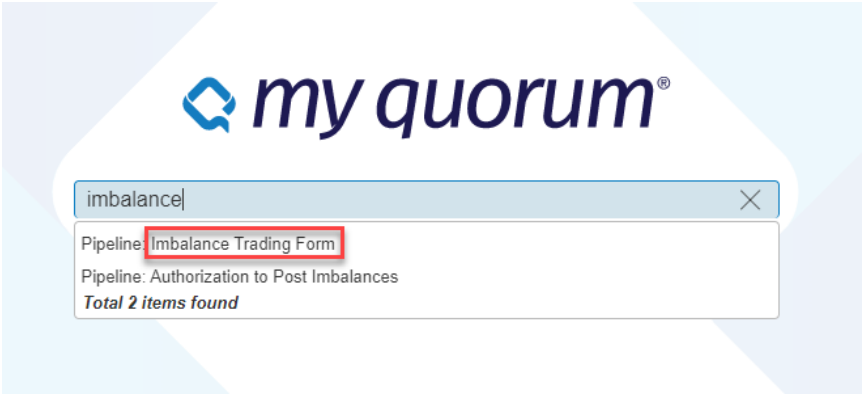
Imbalance Trade- Screen Navigation

- Menu >> Sitemap >> Imbalance >> Imbalance Trades >> Imbalance Trading Form
- You may also use the search function and type in “Imbalance Trading Form”

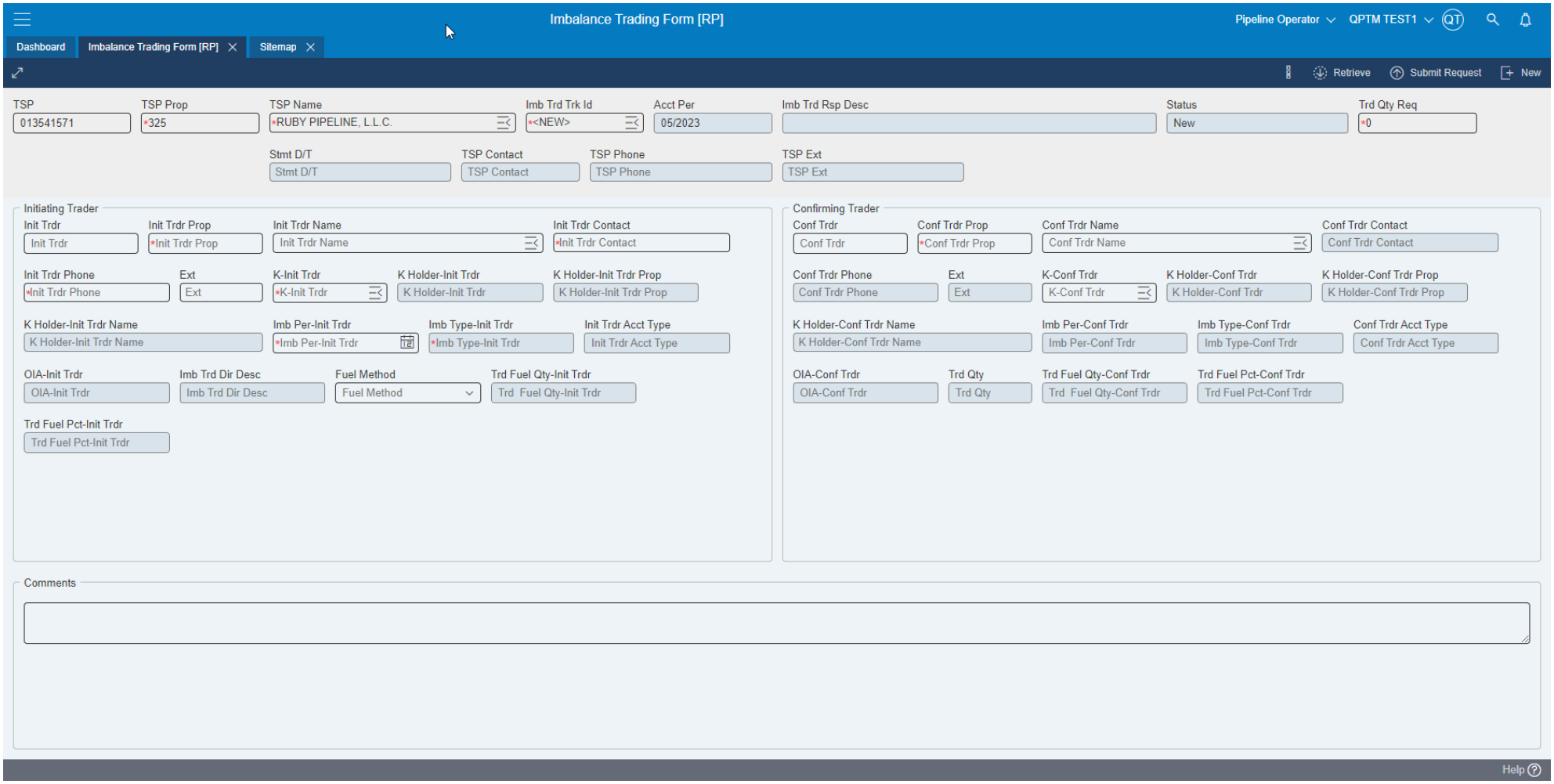






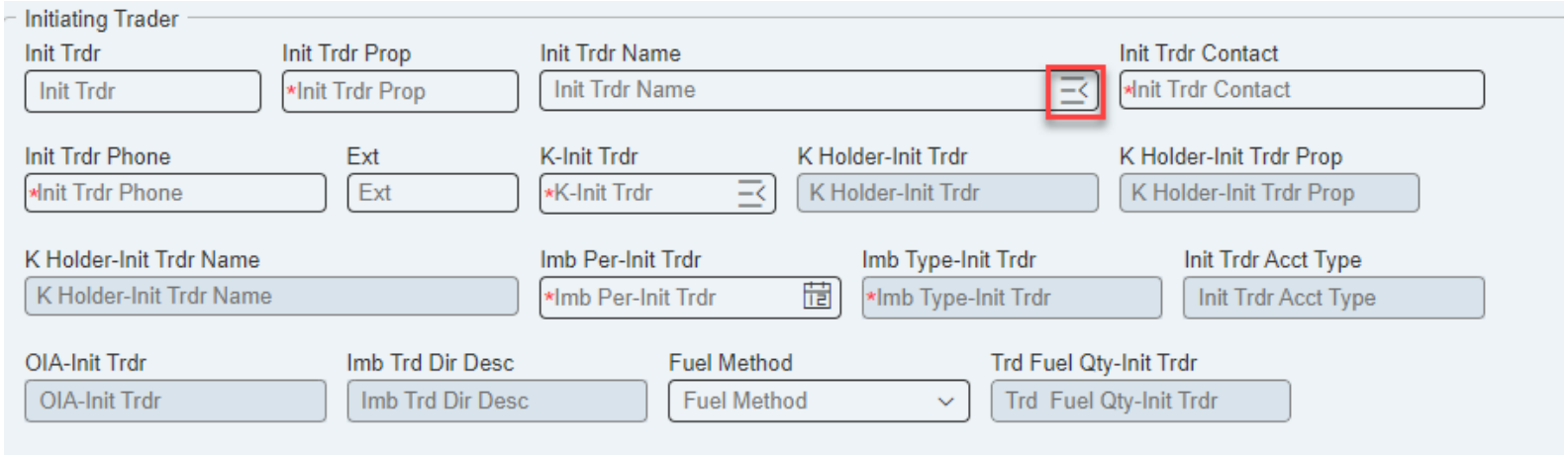
Imbalance Trading Form

- **Note**: Any field with an asterisk is a required field (for all screens)

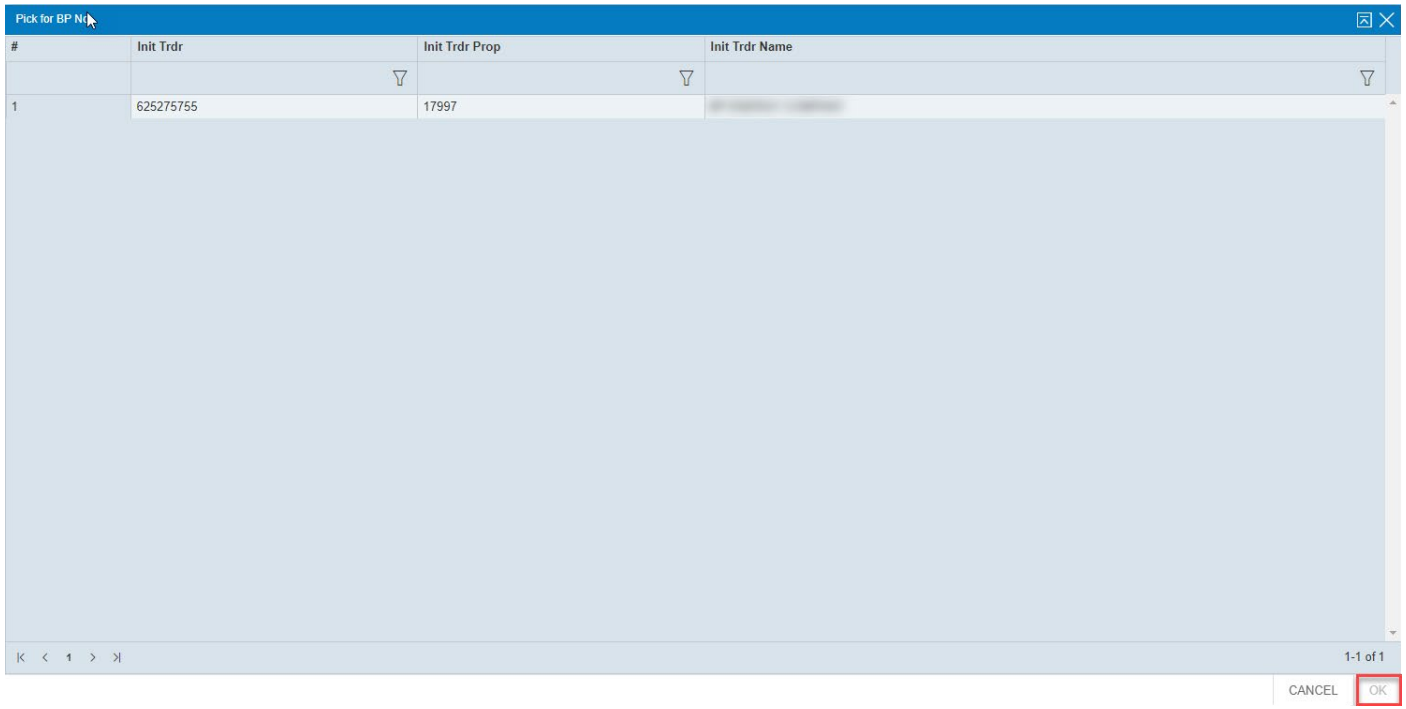


Trade Form: Enter Initiating Trader Info (Pt.1)

- Click on the Pick List to Enter Shipper Data



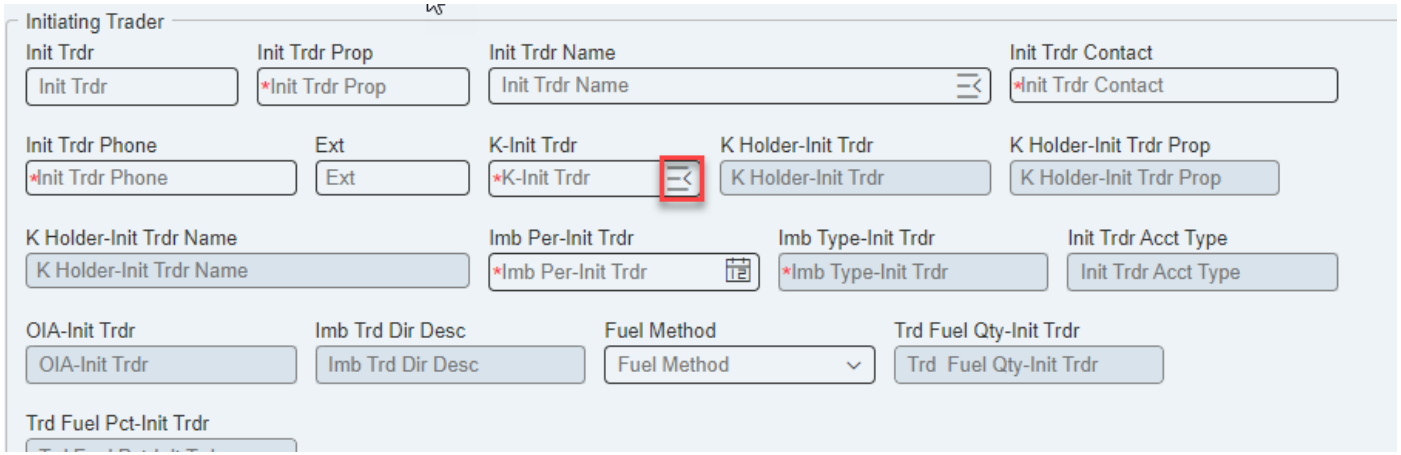
1. Enter in Business Party #
2. Select Shipper
3. Click on OK in the bottom right-hand corner



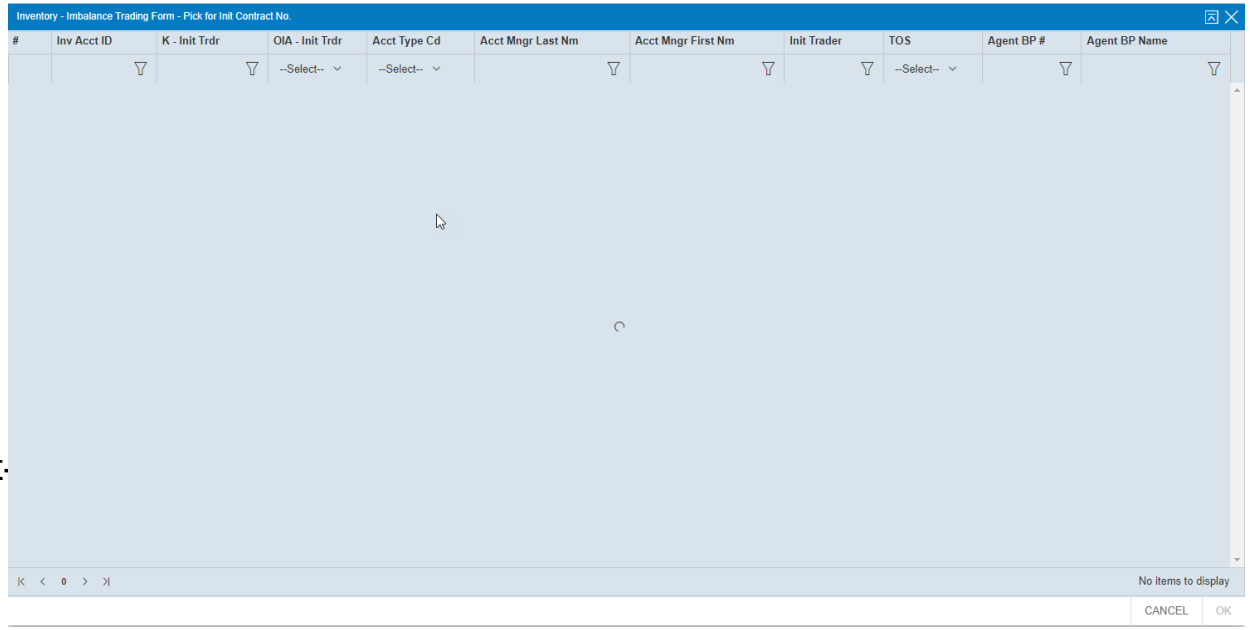
Trade Form: Enter Initiating Trader Info (Pt.1)

- Click on Second Pick List to Enter Contract Information

  (Type KT#, select KT then click “OK” to confirm selection)

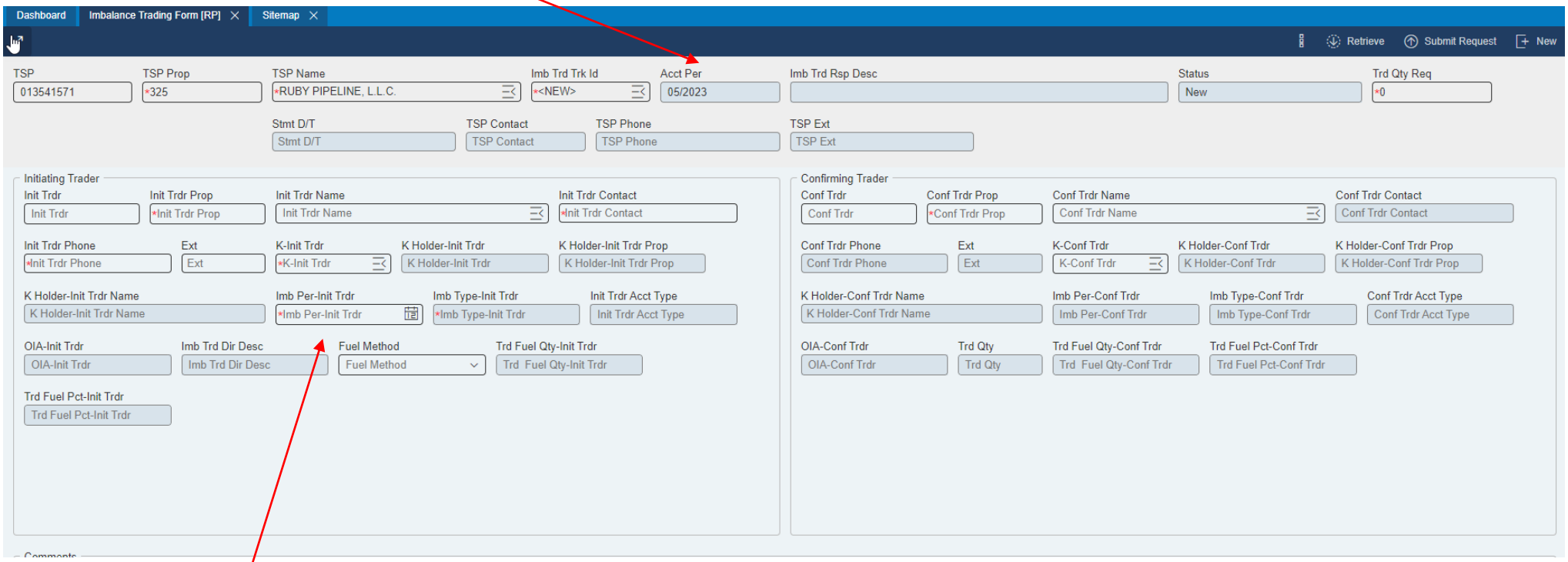


1. Enter in KT #
2. Select from the list of imbalance contracts
3. Click OK in the bottom right-hand corner



Trade Form: Initiating Trader Info. (Pt.1)

Acct Per: Is the current open business month.



Imb Per- Init Trdr: Month Imbalance Occurred

Note: on TIGT Imbalance contracts are (IMBT-BP#)

Trade Form: Selecting Trade Quantity/Fuel (Pt.2)

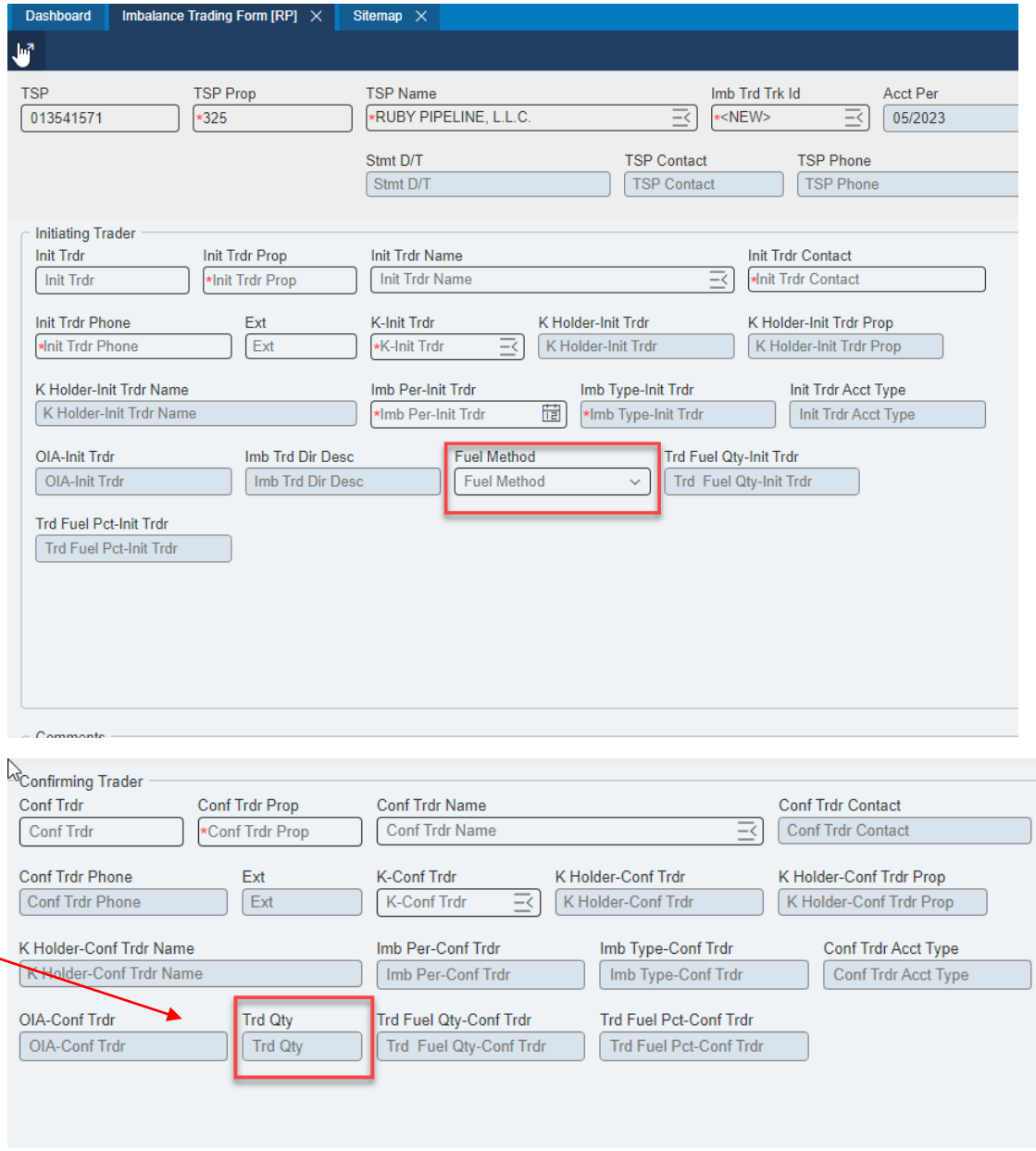
- **Fuel Method**

Imbalance Trade: No Fuel (leave fuel method blank)

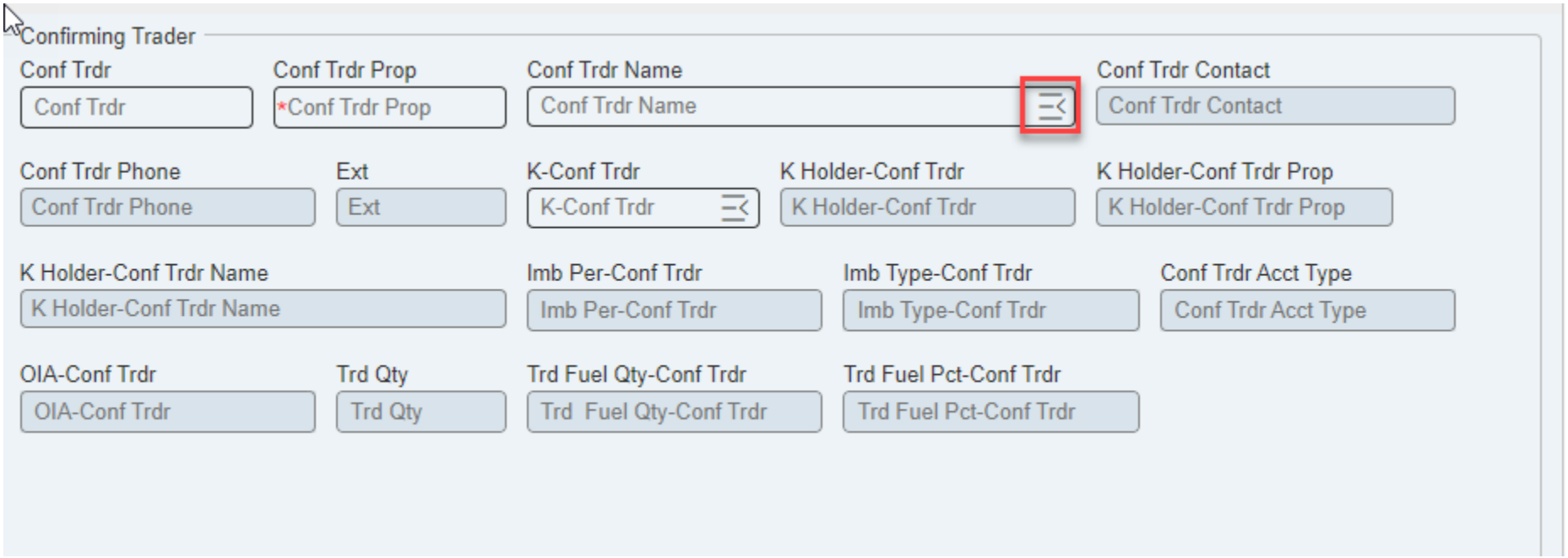
Imbalance Trade w/ Storage: Select fuel in kind

- Fuel is only deducted on injections into Storage (Long IMB)

- Enter Trade Quantity

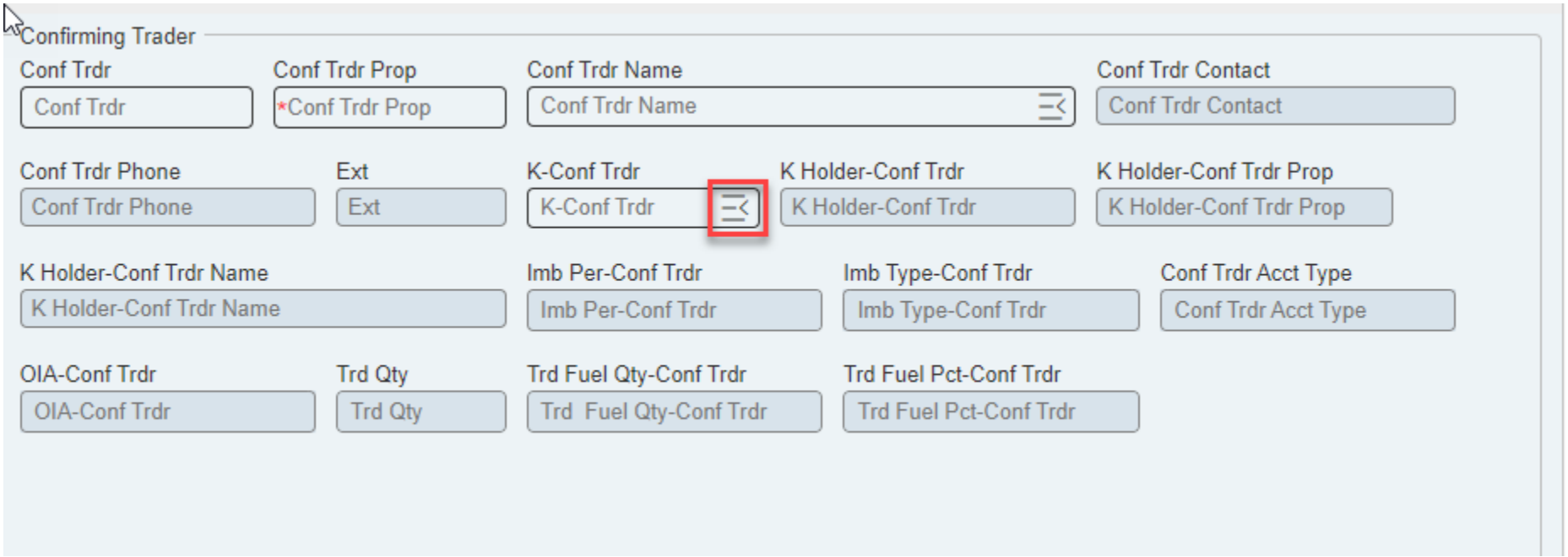


Trade Form: Enter Confirming Trader Info. (Pt.3)



- Use Picklist to Search for Confirming Trader by Company Name or Business Party Number

Trade Form: Entering Confirming Trader KT#

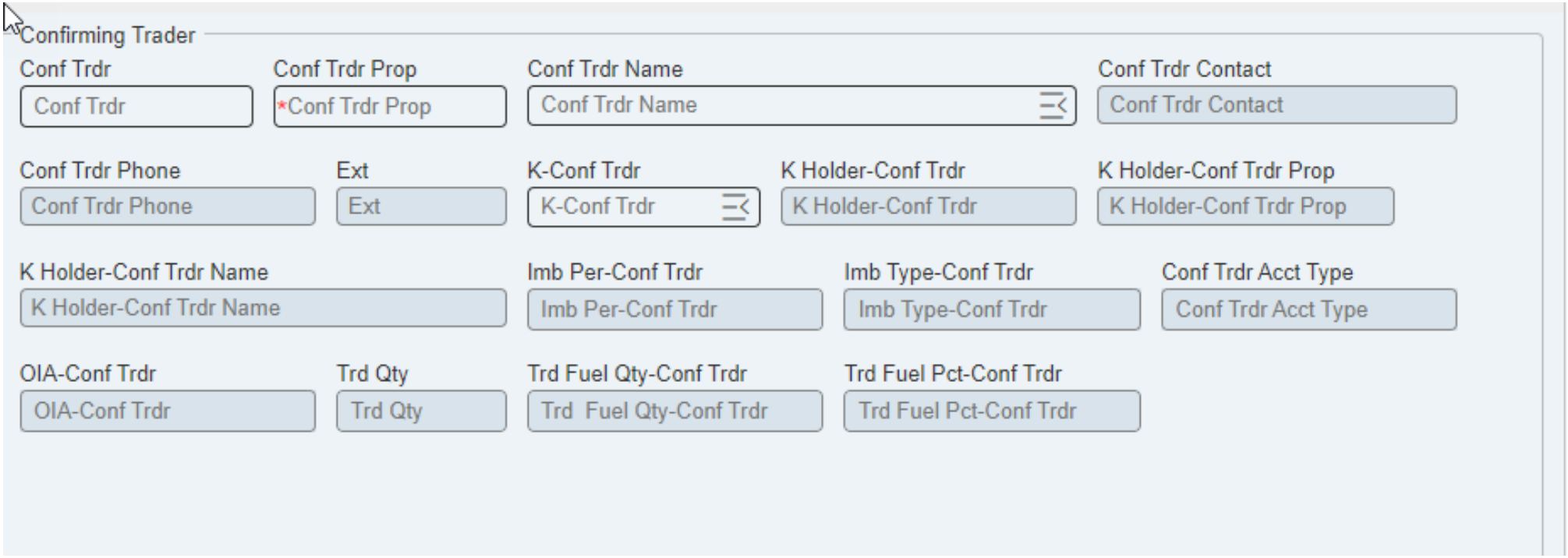


- Using the second pick list, choose confirming trader's imbalance contract.

Enter Confirming Trader Info. Complete

Imbalance KT#

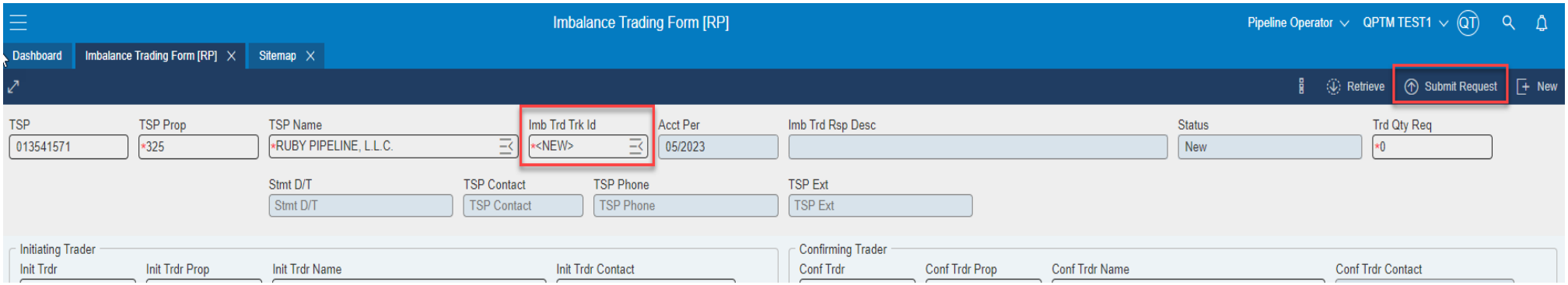
Note: on TIGT Imbalance contracts are (IMBT-Business Party #)



Imbalance Period

Note: Imbalance period (month) must match Initiating Trader

Trade Form: Submitting Trade Confirmation

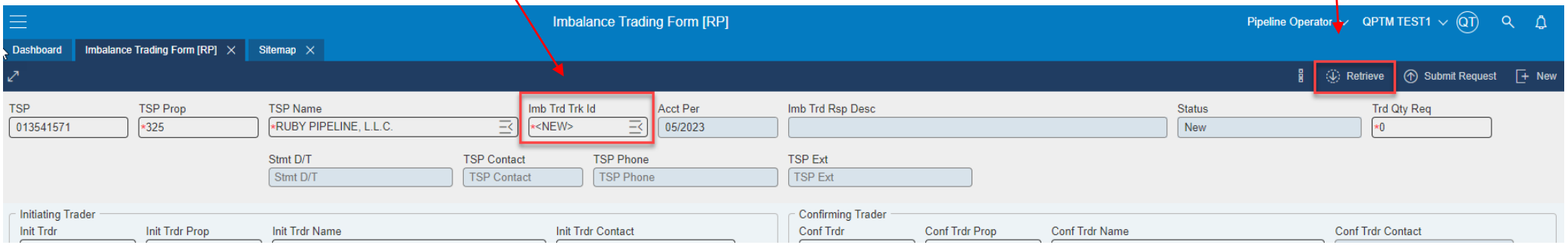


- Once trade request has been submitted a trade ID will be assigned

- Confirming Trader will use this ID to retrieve the pending trade

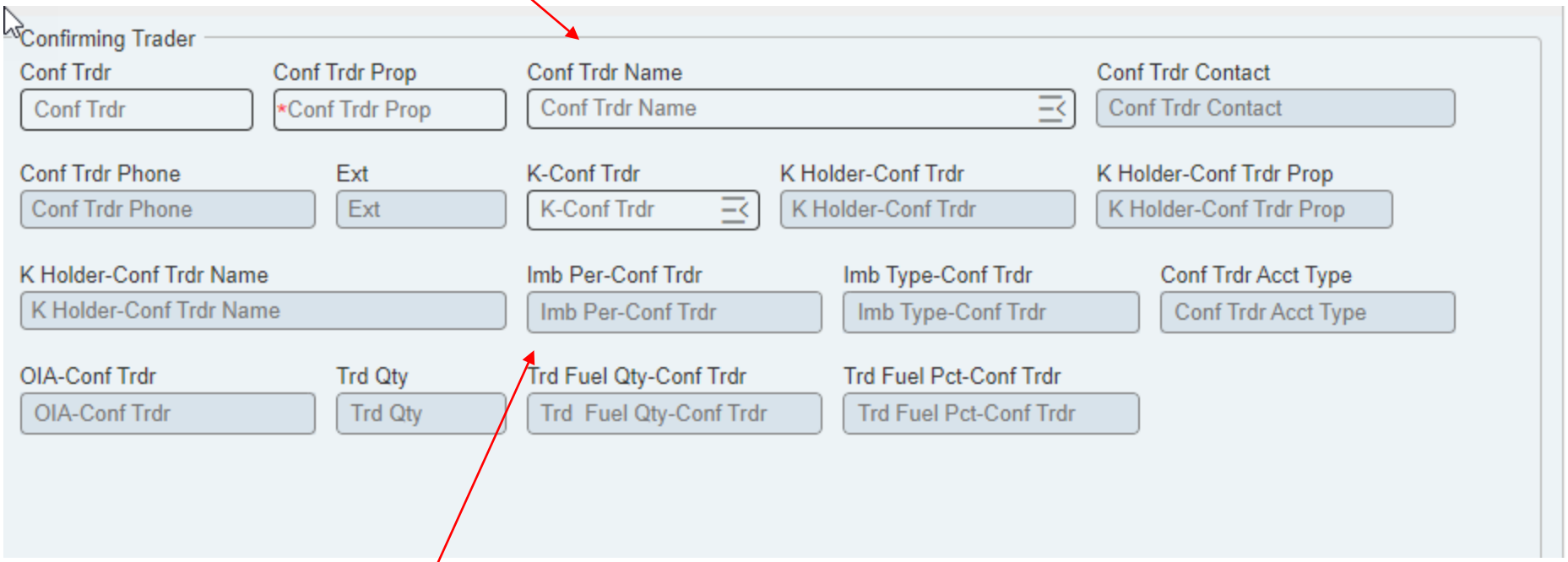
Retrieve Pending Trade for Review / Approval

- Enter the trade ID# into the Imbalance Trade Form Screen and select “Retrieve”



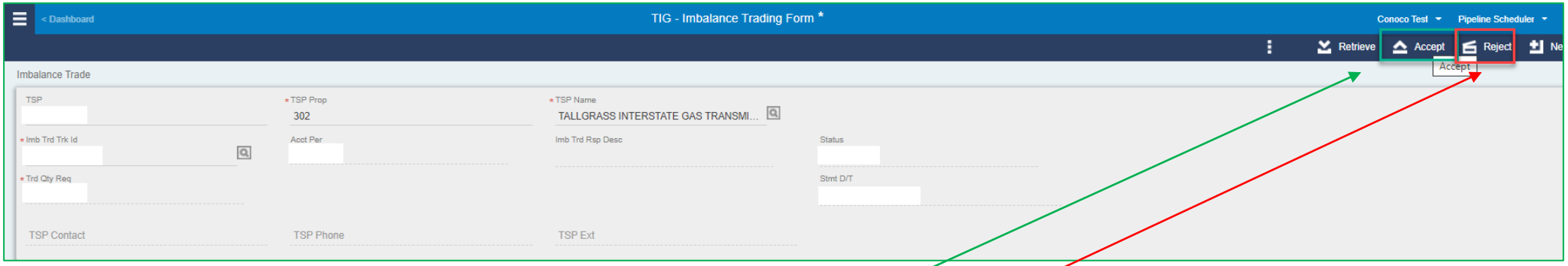
Trade Form: Confirming Trader Information

- Enter contact name and phone number



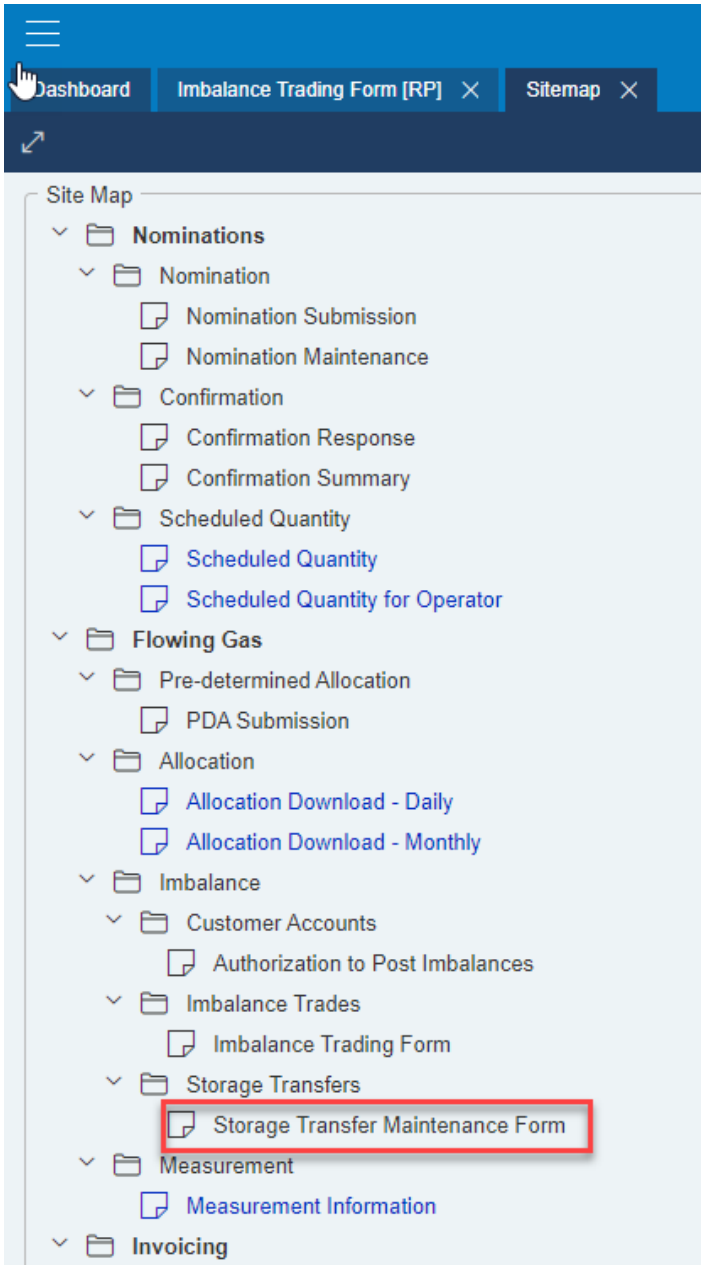
- Verify imbalance period and imbalance type are accurate.

Trade Form: Confirming Trader Information (cont.)



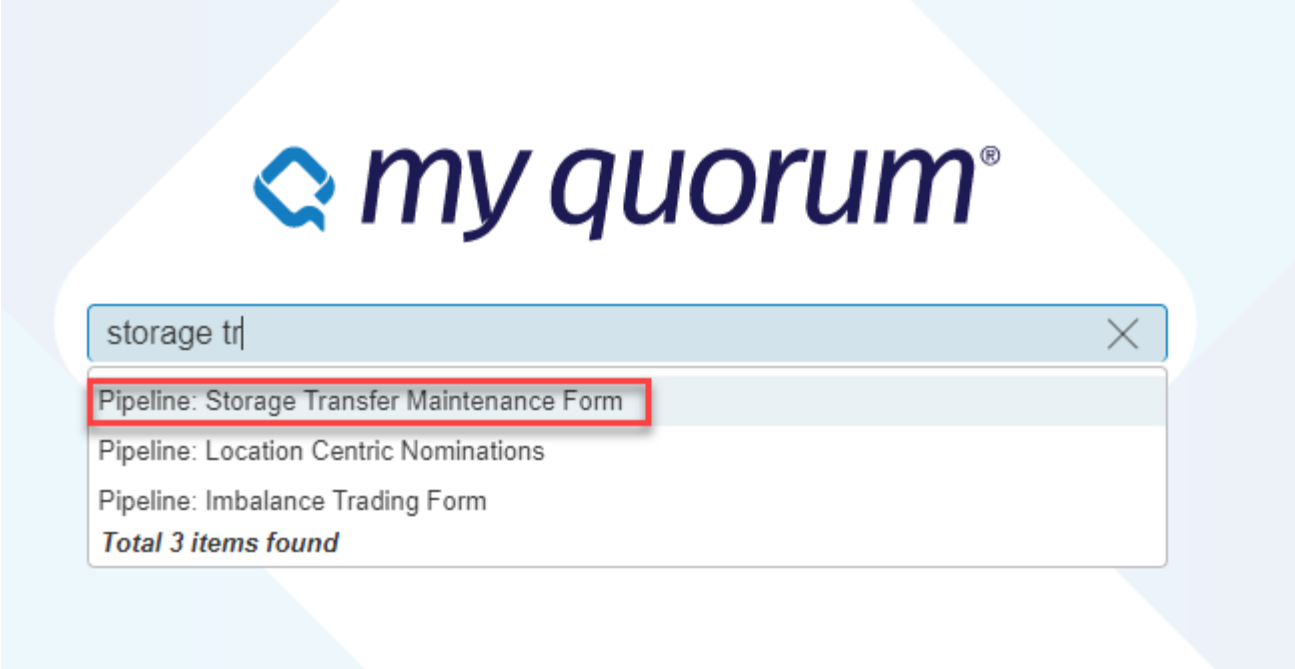
- To approve trade, click **“Accept”**
- To deny trade, click **“Reject”**

Storage Transfer – Screen Navigation



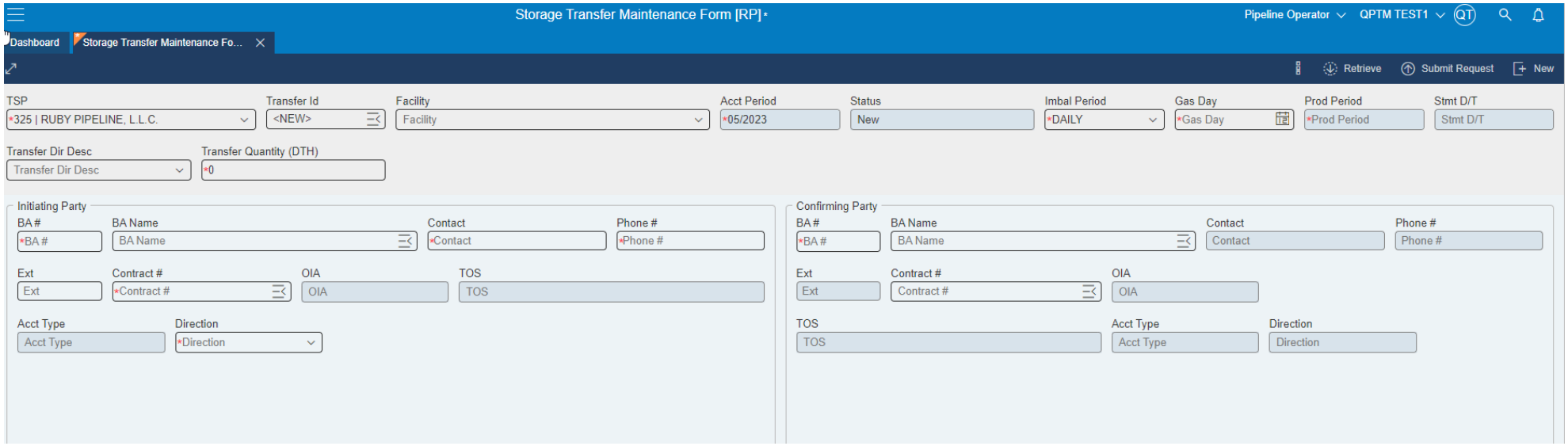
- Sitemap >> Storage Transfers >> Storage Transfer Maintenance Form

- You may also use the search function and type in “Storage Transfer Maintenance Form”



Storage Transfer Form – Initiating Party

- Initiating Shipper/Trader Enters the Following Details – Everything with an Asterisk is mandatory



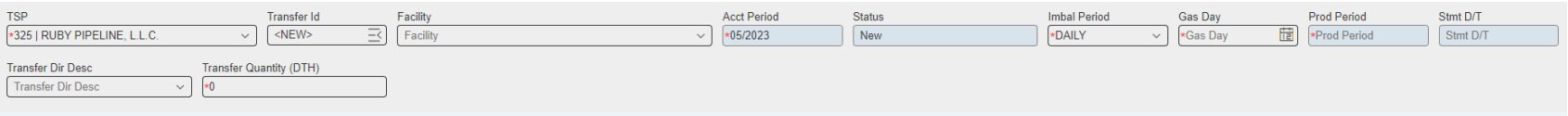
Init. Shipper Storage Contract Number

Direction:
To Init. Party = Injection to
Conf. Party = Withdrawal

Conf. Shipper Storage Contract Number

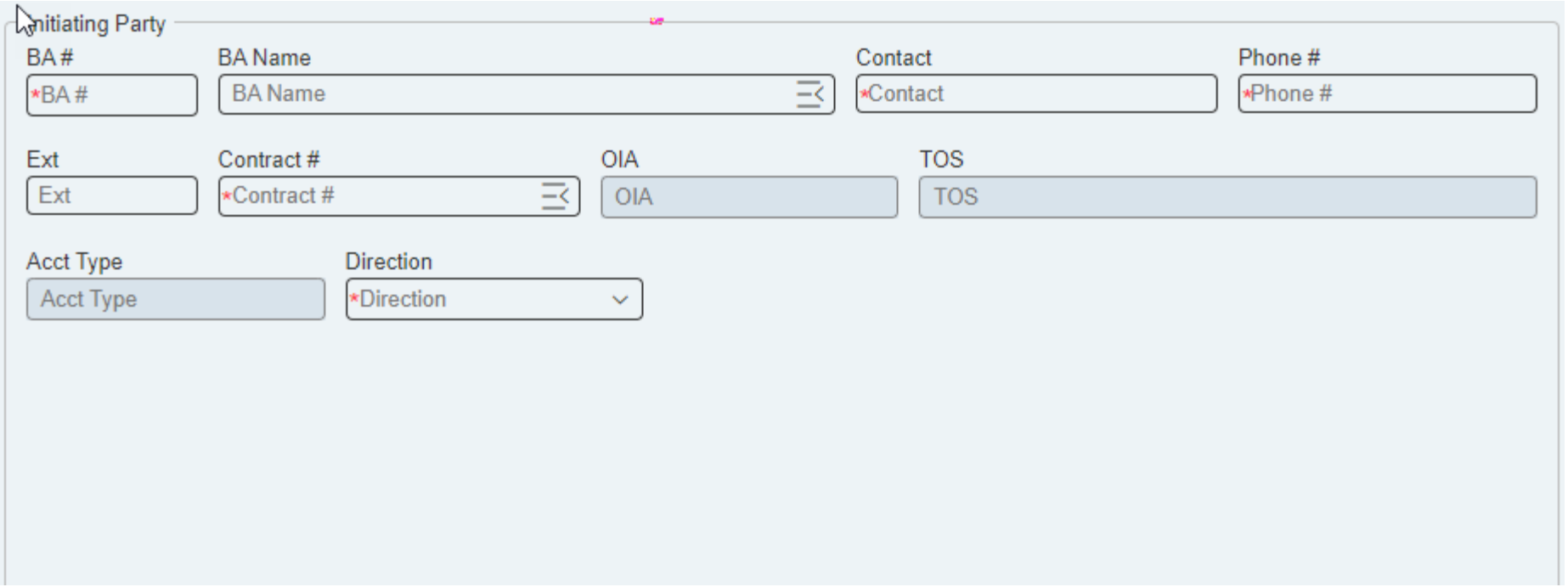
Storage Transfer Form – Initiating Party

- The **initiating shipper** enters all storage transfer information:
- **Steps 1 and 2: From Monthly to Daily**
  - A transfer is a daily process that happens in ground and is effective immediately once confirmed. Storage transfers cannot be scheduled or confirmed for a prior or future date, (Gas Day must equal Stmt D/T).
  - Start by changing imbalance period to daily, click in the Prod Period box below to refresh the form then enter in today's date in the field to the right.



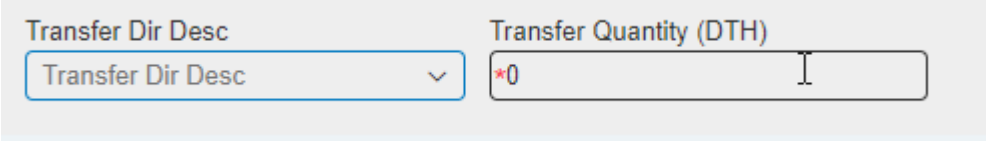
Storage Transfer Form – Initiating Party

- The **initiating shipper** enters all storage transfer information:
- **3.) Initiating Party Information**
  - Enter the Shipper BP# and hit tab to update the selection or use the picklist box next to BA Name and search for it manually.
  - Enter the Shipper Contact Information: (first/last Name and phone number)
  - Select Transfer Direction: If the initiating trader is intending to receive gas the direction is “injection” or if gas is being sent to confirming party select “withdrawal”



Storage Transfer Form – Initiating Party

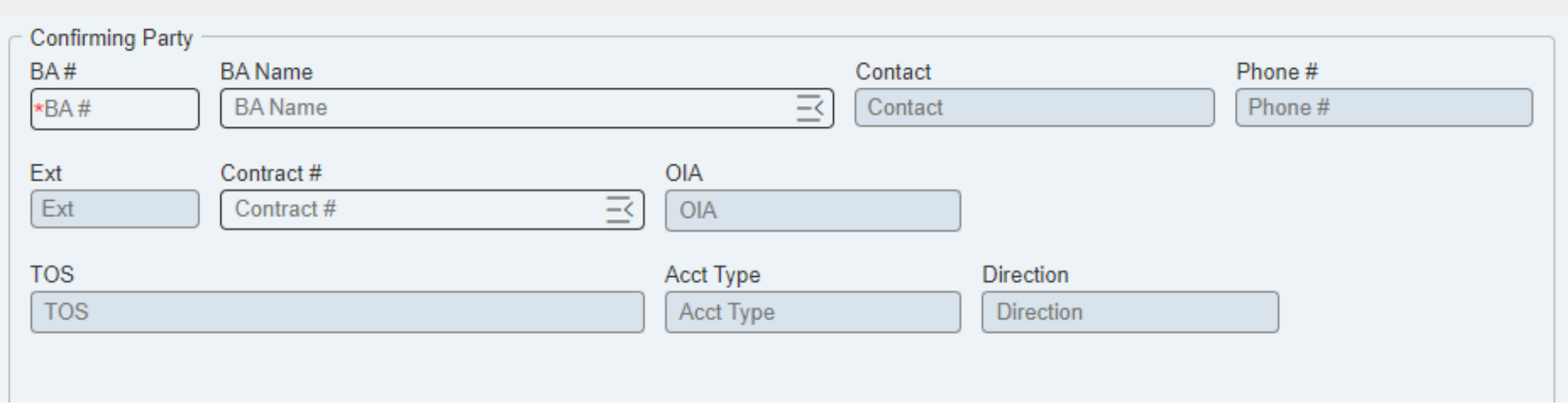
- The **initiating shipper** enters all storage transfer information:
- **4.) Transfer Quantity:**
  - **Verify Transfer Direction (reads as expected)**

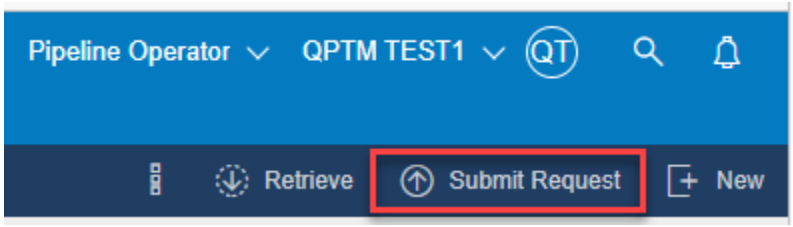


  - **Enter Transfer Quantity**

Storage Transfer Form – Initiating Party

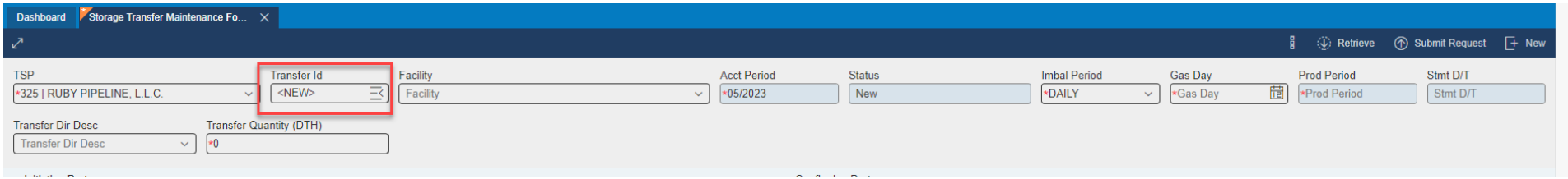
- The **initiating shipper** enters all storage transfer information:
- **5.) Confirming Party Information:**
  - Enter confirming shipper Business Party # or use BA Name picklist
  - Enter storage KT# provided by confirming shipper
  - Once complete click “Submit Request” in the upper right-hand corner





After clicking “Submit Request” a transfer ID is created which the confirming party will use to open the transfer for confirmation

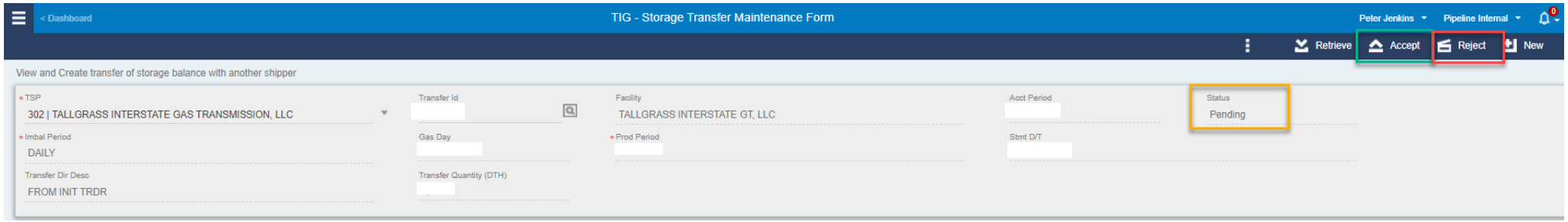
Retrieve Pending Storage Transfer for Approval



- In the Storage Transfer Maintenance Form Screen, enter the **Transfer ID #** or use the picklist (magnifying glass) to search for it manually.

Storage Transfer Form – Confirming Party

- The **confirming shipper** approves the transfer:
  - Enter Contact Information: first/last name and contact number
  - Review the Transfer Info and **Accept** if approved or **Reject** to cancel
  - **Communicate Record Status** with initiating party
  - Please Note: Transfers are only valid if they are submitted and verified in the same day. Whereas Gas Day = Stmt D/T. This is a timely process that cannot be verified retroactively or for a future gas day.



Contact:

If you have questions or need assistance, please reach out to the Business Analyst Team:

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E-mail: BusinessAnalysts@tallgrass.com