



BPM Change Management Meeting

Ryan Ayer

BPM Change Management Process Administrator


BPM_CM@caiso.com

March 26, 2024

Housekeeping reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.
- Meeting is structured to stimulate honest dialogue and engage different perspectives.
- Please keep comments professional and respectful.

Instructions for raising your hand to ask a question

- If you are connected to audio through your computer or used the “call me” option, select the raise hand icon  above the chat window located on bottom right corner of the screen. **Note:** #2 only works if you dialed into the meeting.
- Please remember to state your name and affiliation before making your comment.
- If you need technical assistance during the meeting, please send a chat to the event producer.

Agenda – BPM Change Management Meeting

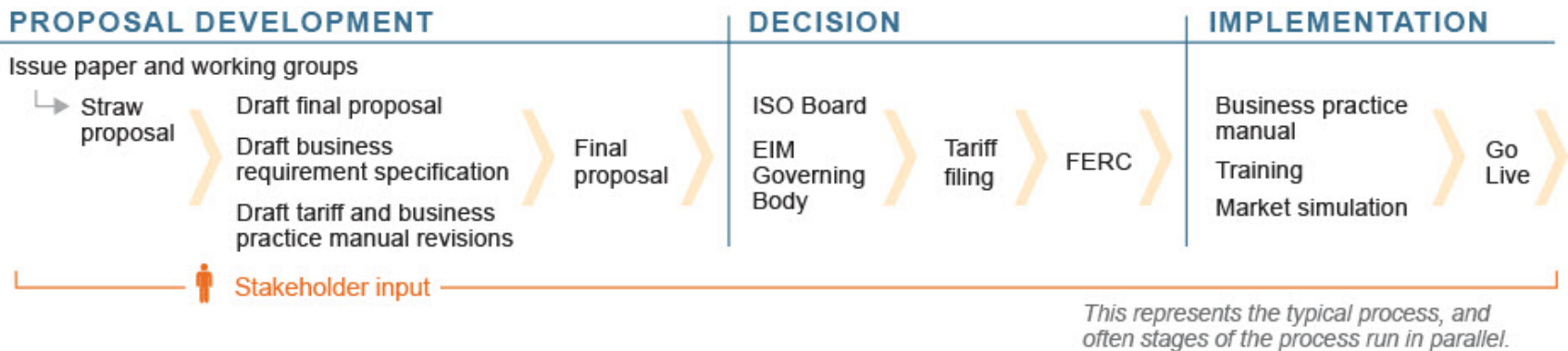
March 26, 2024

Topic	Presenter
Introduction / Meeting Overview	Ryan Ayer
Credit Management and Market Clearing	Christina Billing
Rules of Conduct Administration BPM	Angelica Stahl
Market Operations	Michael Martin
BPM Change Management	Nicole Hines
Definitions and Acronyms	Jacqueline Meredith
Transmission Planning Process	Robert Sparks Andrew Rivera
Generator Interconnection and Deliverability Allocation Procedures	Daune Wilson
Wrap-Up and Next Steps	Ryan Ayer

BPM Change Management Process

BPM_CM@caiso.com

California ISO Stakeholder Initiative Process



- Business Practice Manuals
 - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
 - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
 - *Policy changes submitted through the PRR process will be referred to the policy initiative road map process.*
 - Each subject area in a BPM is based on enabling language in the ISO tariff.
 - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

Credit Management and Market Clearing

PRR	PRR Title	Stage
1554	Minor revision to Section 6.2 Estimated Aggregate Liability Components	Initial

PRR 1554 - Minor revision to Section 6.2 Estimated Aggregate Liability Components

- Reason for revision
 - Language clean up to be in alignment with updated settlements timeline
 - Initial comments: None
- Initial comment period expired: March 12, 2024
- Next step: Post Recommendation

Rules of Conduct Administration

PRR	PRR Title	Stage
1555	Rules of Conduct Enhancements - Phase 1	Initial

PRR 1555 – Rules of Conduct Enhancements – Phase 1

- Reason for revision
 - BPM changes are in support of Tariff changes related to Rules of Conduct Enhancement (ROCE) Phase 1 effort.
 - Initial comments: None
- Initial comment period expired: March 12, 2024
- Next step: Post Recommendation

Market Operations

PRR	PRR Title	Stage
1548	New process for establishing wheeling through priority effective June 2024	Recommendation
1552	Clarification on Number of Historical Days Used in the Mosaic Quantile Regression	Recommendation
1547	Clarification to ancillary service state of charge constraint and bid cost recovery	Recommendation

PRR 1548 – New process for establishing wheeling through priority effective June 2024

- Reason for revision
 - With the existing process for establishing Wheeling Through Priority under the interim framework described in section 30.5.1(z) of the tariff expiring at midnight on May 31 2024, this revision describes the procedures associated with the calculation of Monthly ATC, submission of information, submission of monthly ATC requests manually and processing of Monthly ATC requests manually to launch a process in January 2024 for establishing priority for June 1, 2024 and beyond 2024.

Effective date is 1/17/2024

- Recommendation comments: None
- Recommendation comment period expired: March 12, 2024
- Next step: Post Final Decision

PRR 1552 – Clarification on Number of Historical Days Used in the Mosaic Quantile Regression

- Reason for revision
 - For Flexible Ramp Requirements, the ISO uses a technique called Mosaic Quantile Regression. This technique incorporates both histograms and quantile regression models to estimate uncertainty based on historical data. It was initially set at 180 days but is now configurable.
 - Recommendation comments: None
- Recommendation comment period expired: March 12, 2024
- Next step: Post Final Decision

PRR 1547 – Clarification to ancillary service state of charge constraint and bid cost recovery

- Reason for revision
 - Added the conditions where energy awards for storage resources are not eligible for bid cost recovery.
 - Recommendation comments: PG&E
- Recommendation comment period expired: March 12, 2024
- Next step: Post Final Decision

BPM Change Management

PRR	PRR Title	Stage
1550	Correction to formatting and links to bring Change Management BPM current	Recommendation

PRR 1550 – Correction to formatting and links to bring Change Management BPM current

- Reason for revision
 - Correction to document formatting, updated hyperlinks, and language to bring Change Management BPM current.
- Recommendation comments: None
- Recommendation comment period expired: March 12, 2024
- Next step: Post Final Decision

Definitions and Acronyms

PRR	PRR Title	Stage
1551	Updating Definitions and Acronyms BPM per recent updates	Recommendation

PRR 1551 – Updating Definitions and Acronyms BPM per recent updates

- Reason for revision
 - Revisions incorporate updates to the CAISO Appendix A of Definitions and Acronyms, as well as recent revisions to the other existing BPMs. Effective at end of the PRR process. At least annually, this convenience copy of all definitions and acronyms is updated to reflect changes from the other BPMs and CAISO tariff.
- Recommendation comments: None
- Recommendation comment period expired: March 12, 2024
- Next step: Post Final Decision

Transition Planning Process

PRR	PRR Title	Stage
1553	Gen Model Data Requirements Real Reactive Capability Testing Process Clarification	Recommendation

PRR 1553 – Gen Model Data Requirements Real Reactive Capability Testing Process Clarification

- Reason for revision
 - Provide clarification and instructions for the scheduling testing with the Participating Transmission Owners.
 - Recommendation comments: None
- Recommendation comment period expired: March 12, 2024
- Next step: Post Final Decision

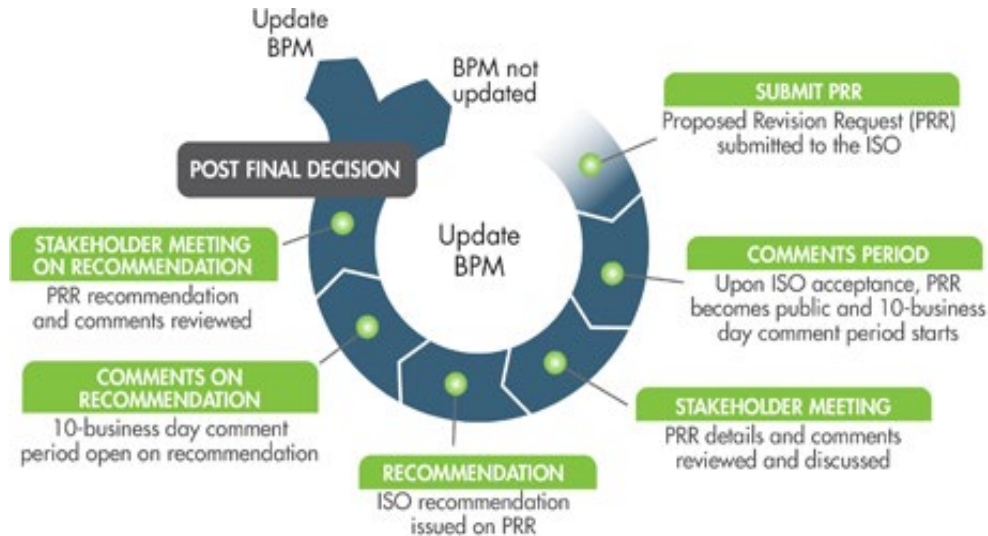
Generator Interconnection and Deliverability Allocation Procedures

PRR	PRR Title	Stage
1545	Interim Deliverability allocation to projects in operation clarification	On Hold

PRR 1545 – Interim Deliverability allocation to projects in operation clarification – ON HOLD

- PRR is on hold
 - Additional internal review, then will be returned to initial commenting period.
- Reason for revision
 - Clarifying that the TP Deliverability Allocation date or Distributed Generation Deliverability Allocation date will be used to determine interim deliverability allocation priority.
- Recommendation comments: MN8 Energy, NextEra Energy Resources

Next BPM PRR Review Monthly Meeting: April 23, 2024 @ 11 a.m.



BPM change management
process questions:

Nicole Hines

BPM_CM@caiso.com