



Stakeholder Commenting Tool Training

Rashele Wiltzius
Manager, Customer Readiness

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Agenda

After this training, you will:

- Understand the purpose of the new stakeholder commenting tool
- Learn how to register for the new stakeholder commenting tool
- Learn how to view and submit comments in the new stakeholder commenting tool
- Understand the stakeholder commenting tool transition timeline



Poll Question



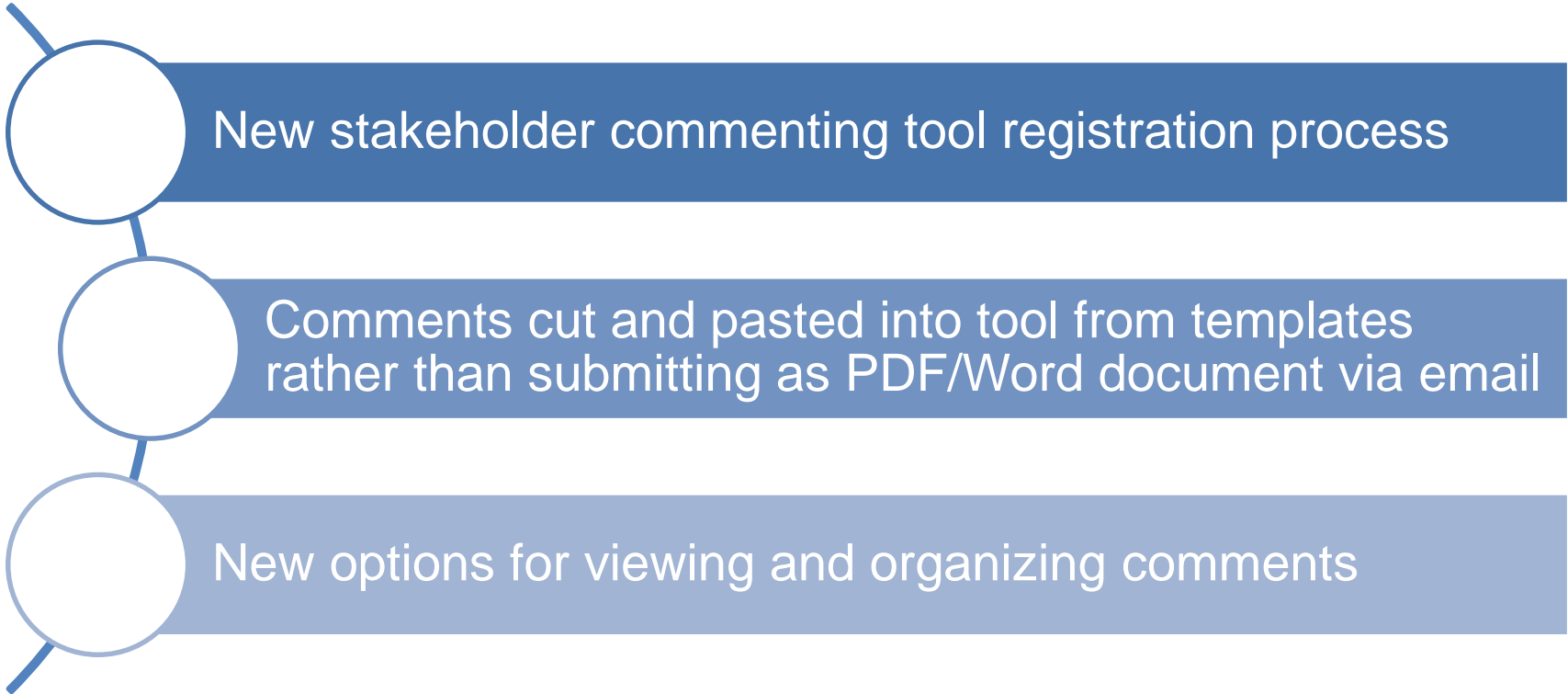
How do you feel about the new stakeholder commenting tool?

- A. Bring it on!
- B. I want to hear more...
- C. I'm a little apprehensive
- D. What's a stakeholder commenting tool?

Stakeholder Commenting Tool Training

OVERVIEW OF CHANGES

Change Overview



Note: Recurring stakeholder processes such as the annual policy initiatives roadmap process, transmission planning process, etc. will be transitioning to the commenting tool at a later time. You can view a list of reoccurring stakeholder processes here:
<http://www.caiso.com/informed/Pages/RecurringStakeholderProcesses.aspx>

Benefits of New Commenting Tool



Minimizes
cybersecurity
risk



Automates
processes for
CAISO staff



Enhances the
stakeholder
comment review
experience



Stakeholder Commenting Tool Training

REGISTRATION PROCESS

Why Do You Have to Register?

- **One time** registration process
- The tool will request information such as:
 - Name
 - Email address
 - Organization information
 - Contact information
- Registration and password creation provides additional security measures
- Allows you to save your work and continue where you left off

Why?

Stakeholder Commenting Tool Registration Process

- To begin registration, navigate to the stakeholder initiative website page:
<https://stakeholdercenter.caiso.com/>
- Or navigate to:
www.caiso.com >>
Stay Informed >>
Stakeholder Initiatives

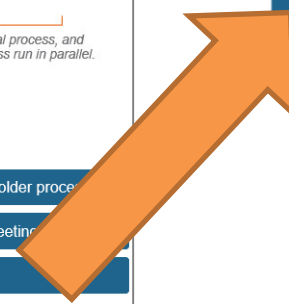
The screenshot displays the California ISO website's 'Stakeholder Initiatives' page. At the top, there is a navigation menu with links for 'Calendar', 'Today's Outlook', 'Recent Documents', 'Daily Briefing', 'Careers', and 'Contact Us'. Below this is the California ISO logo and a search bar. The main content area is divided into three columns: 'PROPOSAL DEVELOPMENT', 'DECISION', and 'IMPLEMENTATION'. The 'PROPOSAL DEVELOPMENT' column includes 'Issue paper', 'Straw proposal', 'Draft proposal', 'Draft business requirement specification', and 'Draft tariff'. The 'DECISION' column includes 'Final proposal', 'ISO Board', 'EIM Governing Body', and 'Tariff filing'. The 'IMPLEMENTATION' column includes 'FERC', 'Business practice manual revisions', 'Market simulation', and 'Go Live'. A red arrow labeled 'Stakeholder input' points to the 'Draft proposal' and 'Draft business requirement specification' steps. A note at the bottom right states: 'This represents the typical process, and often stages of the process run in parallel.' Below the flowchart, there is a breadcrumb trail: 'Home > Stay Informed > Stakeholder Initiatives'. The section title is 'Stakeholder initiatives'. The text describes the process: 'Stakeholder input is vital to the success of ISO's development and implementation of new market designs, policies and infrastructure planning. The stakeholder initiative process allows for a wide variety of stakeholders to engage and give valuable feedback through proposals, meetings, and comments, helping to shape the future of the ISO's energy markets and operations.' To the right of this text are three buttons: 'Recurring stakeholder process', 'Miscellaneous meetings', and 'Commenting tool'. Below the text, there is a link to the 'Annual policy initiatives roadmap page' and a link to 'view a webinar demonstration'.

Stakeholder Commenting Tool Registration Process

- Click on the **commenting tool** button

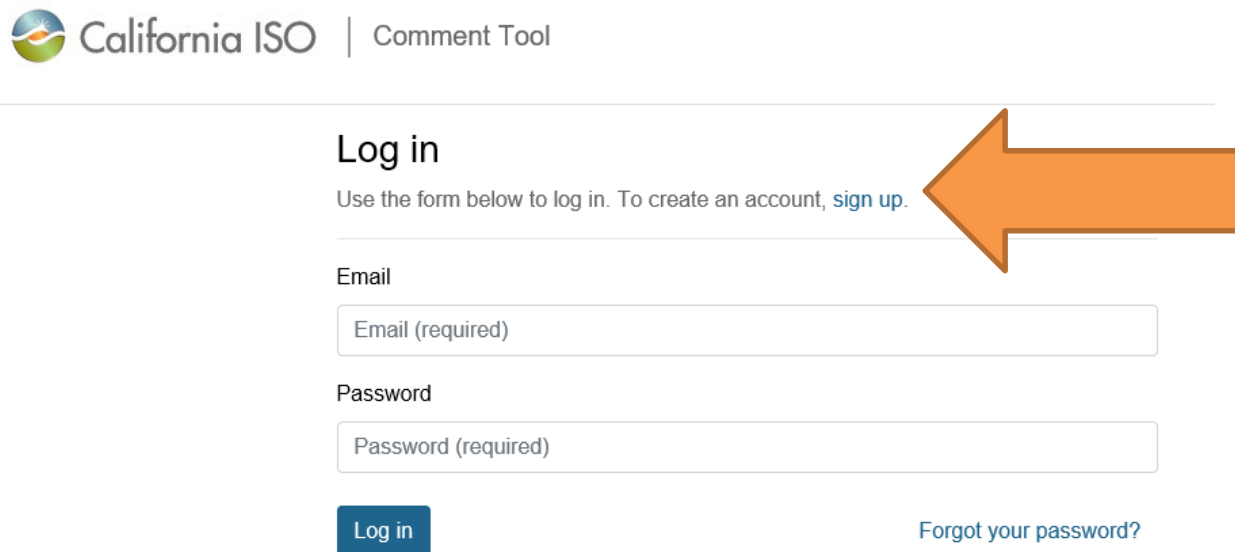
The screenshot shows the California ISO website with a navigation menu (ABOUT US, PARTICIPATE, STAY INFORMED, PLANNING, MARKET & OPERATIONS, RULES, ISO EN ESPAÑOL) and a search bar. The main content area is titled 'PROPOSAL DEVELOPMENT' and is divided into three columns: 'PROPOSAL DEVELOPMENT', 'DECISION', and 'IMPLEMENTATION'. The 'PROPOSAL DEVELOPMENT' column includes 'Issue paper', 'Straw proposal', 'Draft proposal', 'Draft business requirement specification', and 'Draft tariff'. The 'DECISION' column includes 'Final proposal', 'ISO Board', 'EIM Governing Body', and 'Tariff filing'. The 'IMPLEMENTATION' column includes 'FERC', 'Business practice manual revisions', 'Market simulation', and 'Go Live'. A red arrow labeled 'Stakeholder input' points to the 'Draft proposal' and 'Draft business requirement specification' steps. Below the flowchart, there is a note: 'This represents the typical process, and often stages of the process run in parallel.' Below the flowchart, there is a link: 'Home > Stay Informed > Stakeholder Initiatives'. Below the link, there is a section titled 'Stakeholder initiatives' with a paragraph of text: 'Stakeholder input is vital to the success of ISO's development and implementation of new market designs, policies and infrastructure planning. The stakeholder initiative process allows for a wide variety of stakeholders to engage and give valuable feedback through proposals, meetings, and comments, helping to shape the future of the ISO's energy markets and operations.' Below the paragraph, there is a link: 'Visit the ISO's Annual policy initiatives roadmap page to learn about the process timeline and locate a comprehensive catalog of all policy initiatives planned for the year ahead.' Below the link, there is a link: 'The ISO is preparing to launch a new stakeholder commenting tool, to learn more view a webinar demonstration.'

- Recurring stakeholder process
- Miscellaneous meetings
- Commenting tool



Stakeholder Commenting Tool Registration Process

- Click the **sign up** link



California ISO | Comment Tool

Log in
Use the form below to log in. To create an account, [sign up](#).

Email

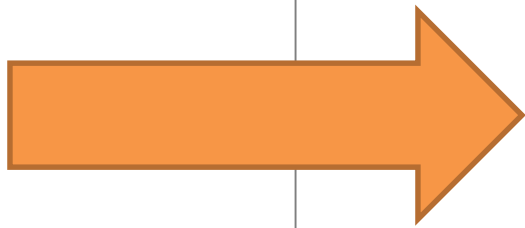
Password

[Forgot your password?](#)

Note: If you registered for the tool during testing, you will need to *reregister* now that the tool is launched.

Stakeholder Commenting Tool Registration Process

- Enter your information into the corresponding fields and click **sign up**



California ISO | Comment Tool

Sign up

In order to submit comments to the California ISO, please complete the registration process.

1. First, complete the information below.
2. You will receive an email with a link to confirm your email address.
3. After your email address has been confirmed, your account will be under review. Account reviews can take up to two business days.
4. You'll receive a final email approving your account. You can then access any Submit Comment link.

Trouble signing up? [Contact us](#)

All fields are required.

Name *

Email *

Organization *

Phone number *

xxx-xxx-xxxx

Password *

Confirm password *

Important Notes about Registration Information

- **All** fields are required fields
- Please ensure that your information is formatted correctly
 - Capital letters, correct grammar, no acronyms, etc.
- Ensure that your organization name is **consistent**
 - Allows tool to connect comments for individuals from the same organization
- Passwords are required to be length of **15 characters or more**
- May take up to **2 business days** to approve access
 - You can contact ISOStakeholderAffairs@caiso.com if you have questions about your registration

Stakeholder Commenting Tool Registration Process

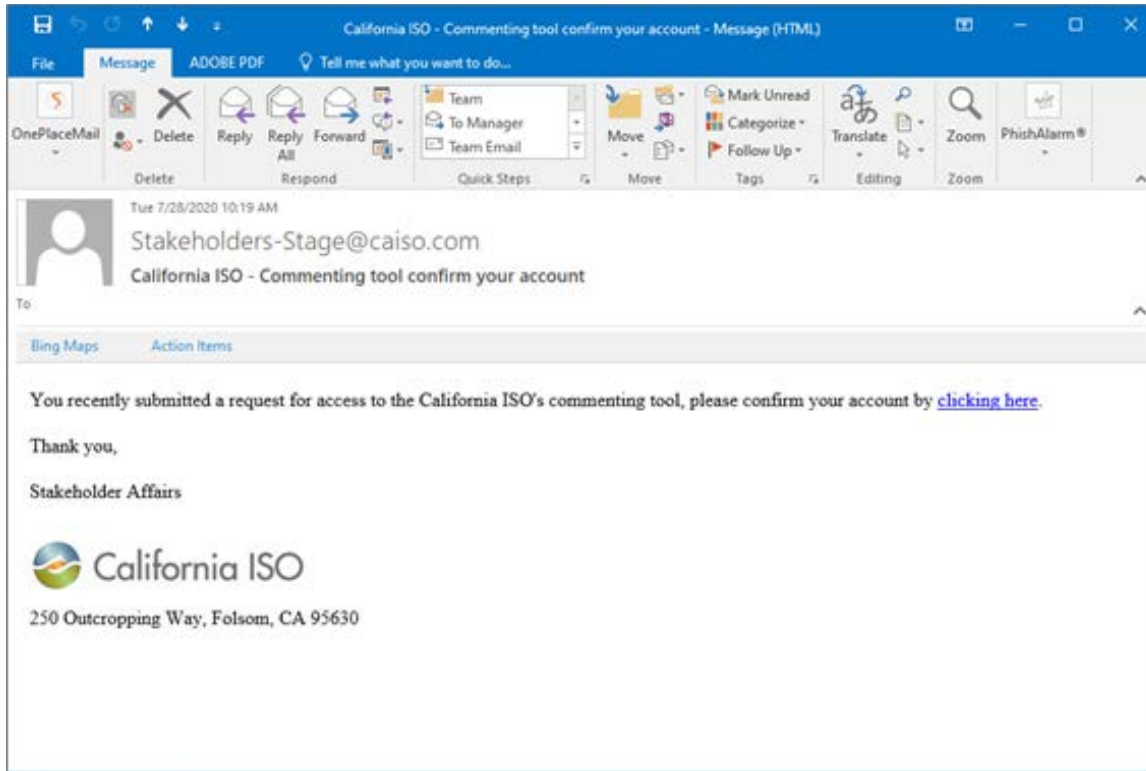
- You will receive a notification in your browser window that your information has been submitted



Your information has been submitted. Check your email and confirm your account.

Stakeholder Commenting Tool Registration Process

Email Samples



Stakeholder Commenting Tool Registration Process

Email Samples

The image displays two screenshots of email messages from California ISO. The first screenshot shows an email titled "California ISO - Commenting tool confirm your account - Message (HTML)" dated Tue 7/28/2020 10:19 AM, from Stakeholders-Stage@caiso.com. The second screenshot shows an email titled "California ISO - Commenting tool account approved - Message (HTML)" dated Tue 7/28/2020 10:34 AM, from StakeholdersPub-Stage@caiso.com. An orange callout box points to the second email with the text: "Email will come from different address once tool goes live".

California ISO - Commenting tool confirm your account - Message (HTML)
Tue 7/28/2020 10:19 AM
Stakeholders-Stage@caiso.com
California ISO - Commenting tool confirm your account

You recently submitted a request for access to the California ISO's commenting tool. Thank you, Stakeholder Affairs

California ISO
250 Outcropping Way, Folsom, CA 95630

California ISO - Commenting tool account approved - Message (HTML)
Tue 7/28/2020 10:34 AM
StakeholdersPub-Stage@caiso.com
California ISO - Commenting tool account approved

Hello
Your request for access to the California ISO's commenting tool has been approved. Thank you, Stakeholder Affairs

California ISO
250 Outcropping Way, Folsom, CA 95630

Forgot Password

- Click the **forgot your password?** link to reset password

The diagram illustrates the process of navigating from a login page to a password reset page. On the left, a 'Log in' form contains an email field with 'jdoe@nosuchemail.com' and a password field with a red error message 'Invalid email or password'. A blue 'Log in' button is at the bottom. A blue link 'Forgot your password?' is circled in orange. An orange arrow points from this link to the right, where a 'Forgot Password' form is shown. This form has a title 'Forgot Password', a subtitle 'Enter your email address and we'll send you an email to reset your password.', an email input field, and a blue 'Reset my password' button.

Log in
Use the form below to log in. To create an account, [sign up](#).

Email
jdoe@nosuchemail.com

Password
Password (required)
Invalid email or password

[Log in](#)

[Forgot your password?](#)

Forgot Password
Enter your email address and we'll send you an email to reset your password.

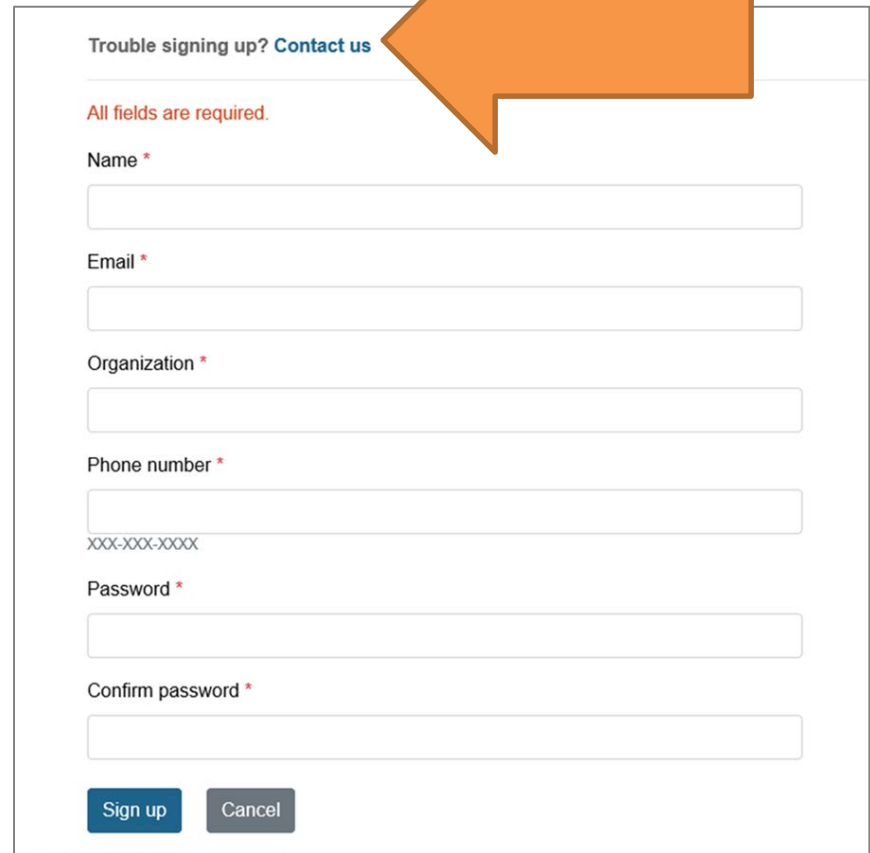
Email

[Reset my password](#)

Registration Troubleshooting

- If you are trying to reregister with an email address that is already being used, the system will prompt you to **contact us**

Note: For technical issues, contact the CAISO Service Desk



Trouble signing up? [Contact us](#)

All fields are required.

Name *

Email *

Organization *

Phone number *

XXX-XXX-XXXX

Password *

Confirm password *



Questions

QUIZ



Poll Question



You go to register for the new stakeholder commenting tool and you enter your new password as “12345”. What will the tool do?

- A. It will tell me I am good to go!
- B. Sorry but the tool does not take passwords using numbers
- C. Good try, but that’s not a long enough password
- D. Wait...I need a password??

Poll Question



After you complete your registration for the new stakeholder commenting tool, will you be able to enter comments immediately?

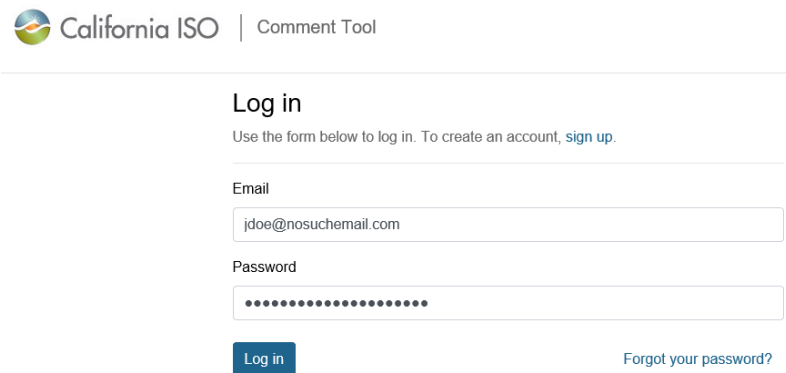
- A. You betcha!
- B. Nope. I'm gonna need to wait for CAISO to approve my request
- C. Hmmmm...I'm not quite sure, honestly
- D. What is a comment again?

Stakeholder Commenting Tool Training

COMMENTING TOOL NAVIGATION

Logging Into the Commenting Tool

- To log into the commenting tool once registered, click the **commenting tool** button on the Stakeholder Initiatives page and enter your login information



The screenshot shows the login interface for the California ISO Comment Tool. At the top left is the California ISO logo and the text "California ISO | Comment Tool". Below this is a "Log in" section with the instruction "Use the form below to log in. To create an account, [sign up](#)." There are two input fields: "Email" with the value "jdoe@nosuchemail.com" and "Password" with masked characters. A blue "Log in" button is positioned below the password field, and a link for "Forgot your password?" is to its right.

Note: Once you have logged in, the stakeholder commenting tool will keep you logged in unless you log out of the tool, your computer, or delete your browser history/information.

Active Comments Page

- After logging in, you will arrive at your **active comments** page

Your organization will show here

Active CAISO comments

Once comments are published to www.caiso.com they will no longer appear in this list

Your organization has no active comments. Choose an open comment to start a new comment.

All open comments

[Aliso Canyon gas-electric coordination phase 5 - Test comment template for user testing](#)

Due: Jul 31, 05:00 PM

Active Comments Page

- You can use the “breadcrumb” links to navigate back to the list of stakeholder initiatives



[Home](#) > [Stay Informed](#) > [Stakeholder Initiatives](#) > Active CAISO comments

Active CAISO comments

Once comments are published to www.caiso.com they will no longer appear

More Ways to Log In

- You can also log into the tool by going **directly to an initiative** to submit a comment (we will talk more about the submit comments button later)




Log in

Use the form below to log in. To create an account, [sign up](#).

Email

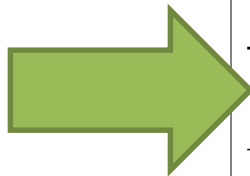
Password

[Log in](#) [Forgot your password?](#)

| | |
|---|---|
|  Dec 31, 2019 FERC approval 01/15/2020 |  Submit comments <i>Due: Jul 31, 05:00 PM</i> |
|  Oct 31, 2019 Tariff Amendment - Southern California Maximum Gas Constraint-Aliso Canyon (ER20-273) 12/16/2019 | |

Stakeholder Initiatives Web Page







- On the stakeholder initiatives web page, click on the title of the initiative you want to view



| Search for initiative <input type="text" value="Search for initiative"/> | | STATUS: Active <input type="button" value="v"/> | |
|--|---|--|---|
| Title | Proposal Development | Decision | Implementation |
| Aliso Canyon gas-electric coordination phase 5 | Oct 07, 2019 Draft tariff language | Dec 31, 2019 FERC approval (ER20-273) Oct 31, 2019 Tariff amendment filing (ER20-273) | |
| Capacity procurement mechanism soft offer cap | Q1 2020 Board of Governors meeting | | Oct 02, 2020 Deployment Oct 2020 Activation Implementation milestones |
| Coffee drinking facilitates social interaction | Apr 17, 2020 Straw proposal | | |
| Commitment cost enhancements tariff clarifications | Feb 04, 2020 Meeting Feb 18, 2020 Comments due Mar 25-26, 2020 Board of Governors meeting | | |
| Commitment costs and default energy bid enhancements EIM E2 | Feb 12, 2020 Revised draft tariff language Feb 20, 2020 Comments due Feb 27, 2020 Meeting | Sep 05, 2019 Tariff amendment filing (ER19-2757) Aug 30, 2019 Tariff amendment filing (ER19-2727) Mar 22, 2018 Board of Governors approval Mar 08, 2018 EIM Governing Body briefing | Jan 2020 Phase 1 Deployment Apr 2020 Phase 1 Activation Implementation milestones |

Initiative Page Overview – Submitting Comments

Phase 5

| | | |
|-------------|--|---|
| |  Dec 31, 2019 FERC app |  Submit comments <i>Due: Jul 31, 05:00 PM</i> |
| |  Oct 31, 2019 Tariff A Constraint-Aliso Canyon |  Submit comments <i>Due: Oct 31, 05:00 PM</i> |
| Web meeting |  Video - Aliso Canyon 11/15/2019 | View comments |
| |  Draft Tariff Language - Aliso Canyon Gas-Electric Coordination Phase 5 09/26/2019 | |

Indicates the commenting period is open

Indicates the due date for comments

Note: After the due date, the commenting tool will be closed. If you need to submit additional comments, please contact Stakeholder Affairs. The tool will stay active 24 hours after the comment period ends and any comments submitted after the comment period closes will be labeled “submitted late” on the View Comments page.

Initiative Page Overview – Viewing Comments

Phase 5

| | | | |
|-------------|--|---|---|
| |  Dec 31, |  |  View comments |
| |  Oct 31, 2019 Tariff Amendment - Southern California Maximum Gas Constraint-Aliso Canyon (ER20-273) 12/16/2019 | | |
| Web meeting |  Video - A... 11/15/2019  Draft Tariff 09/26/2019  Presentation Language - Oct 7, 2019 10/03/2019 This is a TEST |  |  View comments |

Note: You do not need to register to view comments other people have submitted.

Stakeholder Commenting Tool Training

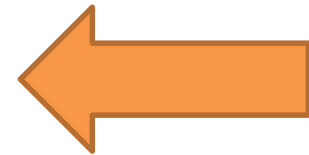
SUBMITTING COMMENTS

Submitting Comments

- To begin submitting comments, click the **submit comments** link

Phase 5

| | | |
|-------------|---|--|
| |  Dec 31, 2019 FERC approval 01/15/2020 |  View comments  Submit comments <i>Due: Jul 31, 05:00 PM</i> |
| |  Oct 31, 2019 Tariff Amendment - Southern California Maximum Gas Constraint-Aliso Canyon (ER20-273) 12/16/2019 | |
| Web meeting |  Video - Aliso Canyon Gas-Electric Coordination Phase 5 - Oct 7, 2019 11/15/2019  Draft Tariff Language - Aliso Canyon Gas-Electric Coordination Phase 5 09/26/2019  Presentation - Aliso Canyon Gas-Electric Coordination Phase 5 - Draft Tariff Language - Oct 7, 2019 10/03/2019 This is a TEST | View comments |



Verifying Correct Initiative

The item you are submitting comments on

Submit comment on Aliso Canyon gas-electric Coordination Draft Final Proposal
Aliso Canyon gas-electric coordination

[Download comment template \(.docx\)](#)

Initiative you are submitting comments for

Submitted by

Rashele Wiltzius, CAISO

Contact information

Optional, will appear with comments on website.

I'm submitting on behalf of other organization(s)



Contact Information

Submit comment on Aliso Canyon gas-electric Coordination Draft Final Proposal

[Download comment template \(.docx\)](#)

Aliso Canyon gas-electric coordination

Submitted by

Rashele Wiltzius, CAISO

Name of submitter

Contact information

Optional, will appear with comments on website.

Additional contact information
(optional)

I'm submitting on behalf of other organization(s)

Submitting on Behalf of Other Organizations

Check box
Note: the fields below are required when this box is checked

I'm submitting on behalf of other organization(s)

Enter business name of all organizations you are submitting for

Enter organization(s):

ex: PacificCorp, Arizona Public Service and Idaho Power

Provide a name for organization(s) submitting on behalf of:

ex: Joint EIM Entities




Enter group name

Word Document Templates

Previous Location:



Activities

| | | |
|-------------|---|-------------------------------|
| Web meeting | <ul style="list-style-type: none"> Comments Template - Day-Ahead Market Enhancements - Revised Straw Proposal 06/15/2020 The comments deadline for the revised straw proposal has been extended to Jul 13, 2020. Comments due to initiativecomments@caiso.com. Video - Day-Ahead Market Enhancements - Jun 17, 2020 Video - Day-Ahead Market Enhancements - Jun 15, 2020 Presentation - Day-Ahead Market Enhancements - Jun 15 and 17, 2020 06/11/2020 | View comments |
|-------------|---|-------------------------------|

New Location:

Submit comment on Aliso Canyon gas-electric
Coordination Draft Final Proposal
Aliso Canyon gas-electric coordination

[Download comment template \(.docx\)](#)

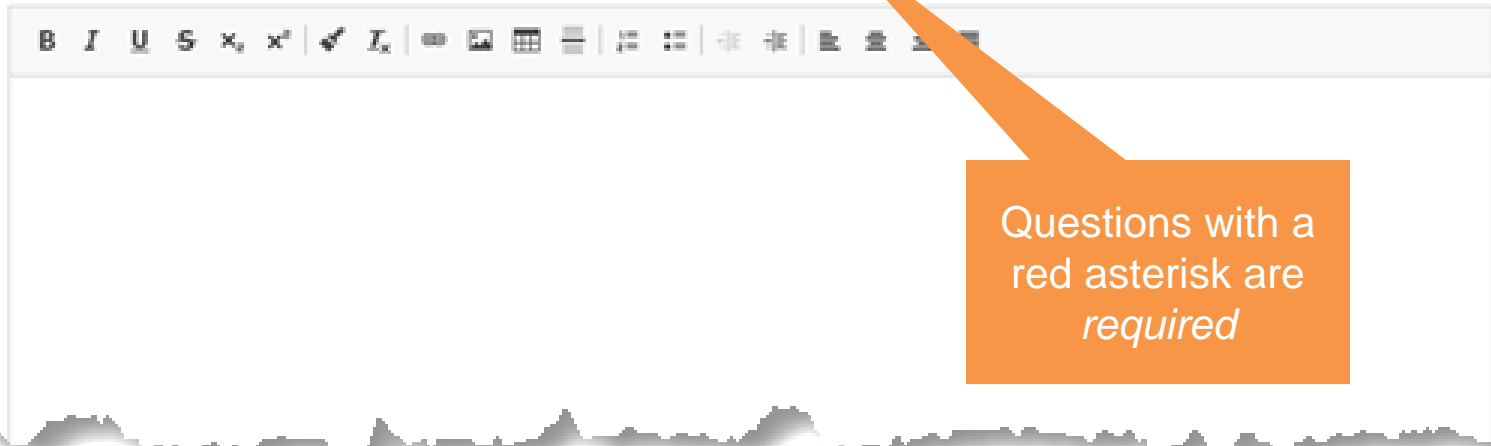


Comment Fields

- When submitting comments, you will need **copy and paste** your information directly from the template into each question field

1. Do you have pet(s) trying to help you with your ISO workload? *

If you have pets, please describe specifically what things your pets do to "help" your

A screenshot of a web form showing a question with a red asterisk. The question is "1. Do you have pet(s) trying to help you with your ISO workload? *". Below the question is a text input field with a rich text editor toolbar. The toolbar includes icons for bold (B), italic (I), underline (U), strikethrough (ABC), link (x), unlink (x'), undo (↶), redo (↷), bulleted list (☰), numbered list (☰), indent (☰), outdent (☰), link (🔗), unlink (🔗), and a help icon (❓). The input field is empty. An orange callout box with a white border points to the red asterisk. The callout box contains the text "Questions with a red asterisk are required" in white font.

Questions with a
red asterisk
are
required

Position Buttons on Comment Questions

- Some questions have **radio buttons** that allow you to mark your position

3. Some people feel having a pet leads to greater happiness. Do you agree?

Tell us why you agree or disagree with this statement.

Choose: Support Support with caveats Oppose Oppose with caveats No position



B *I* U ~~S~~ x_2 x^2 | I_x | | |

Allowed Content in Commenting Fields

- The following items are allowed in the commenting box:

Text

Tables

Images

Footnotes

Formulas

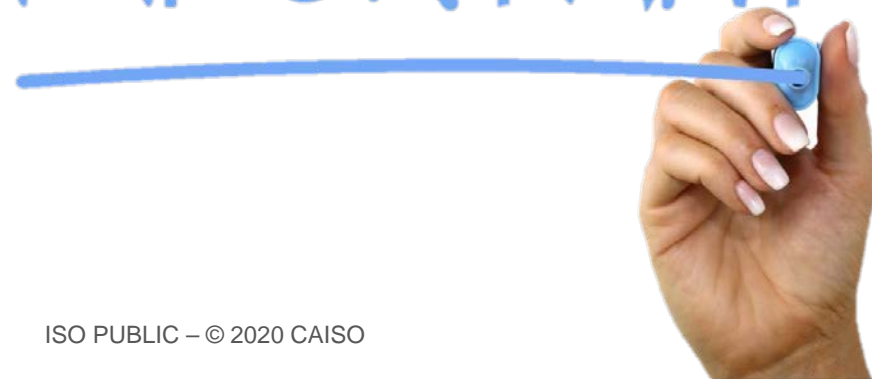
Hyperlinks

Note: When pasted into the tool, formulas will be transitioned to a non-editable image. Word will also add a "text" version of formulas which users can delete.

Other Important Formatting Information

- **Bold**, underline, *italics* and ~~strikethrough~~ text formatting will be transferred into the commenting field
- Colored font or different font sizes will **not** be transferred into the commenting field

IMPORTANT



More on Footnotes

- **Footnotes** will automatically be created when copying and pasting from a Word document footnote

Etiam quam urna, molestie id lorem ut, convallis malesuada diam.² Aliquam mollis, eros a ultricies laoreet, nibh enim varius elit, in cursus odio elit quis magna ac consectetur. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Sed quis ligula nisl. Nullam eget erat placerat. Sed a erat augue. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Proin in diam lacinia, blandit nisl eget, fringilla nisl. Donec hendrerit ut mi id molestie. Sed posuere dapibus erat, a auctor nisl auctor ut. Etiam laoreet luctus massa, at consequat ligula pharetra vel. Curabitur hendrerit eleifend nisi ut ullamcorper. Aenean euismod, turpis in congue aliquet, nisl erat porttitor mauris, nec sollicitudin libero lorem vitae tellus. Maecenas finibus tincidunt sem in porta.

² This is a footnote, please see <https://www.quetext.com/blog/a-brief-history-of-the-footnote> for more information on footnotes. |

4. Do you have any other comments?

Please add your comments below.

B I U S x₂ x² |   |    |  |  |  |  |  |  |  |  |  |

Etiam quam urna, molestie id lorem ut, convallis malesuada diam.^[1] Aliquam mollis, eros a ultricies laoreet, nibh enim varius elit, in cursus odio elit quis sem. Nam ullamcorper varius magna ac consectetur. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Sed quis ligula nisl. Nullam eget erat placerat, pulvinar sem in, commodo tellus. Sed a erat augue. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Proin in diam lacinia, blandit nisl eget, fringilla nisl. Donec hendrerit ut mi id molestie. Sed posuere dapibus erat, a auctor nisl auctor ut. Etiam laoreet luctus massa, at consequat ligula pharetra vel. Curabitur hendrerit eleifend nisi ut ullamcorper. Aenean euismod, turpis in congue aliquet, nisl erat porttitor mauris, nec sollicitudin libero lorem vitae tellus. Maecenas finibus tincidunt sem in porta.

^[1] This is a footnote, please see <https://www.quetext.com/blog/a-brief-history-of-the-footnote> for more information on footnotes. |



Note: Footnote counts start over for each question.

Attachments

- You can attach other items such as diagrams, formulas or redlined documents to your comments by using the **attachments** link at the bottom of the commenting page

Attachments

Note:

attachments should be limited to diagrams, formulas or redlined tariff language.

Note: If you add your Word comment template to the initiative as an attachment, it will only be viewable as a link on the comment page and the comments will not be viewable using the new navigation options.

Finalizing Comments

Save

- Saves all your comments so you can come back and make edits later

Save & Preview

- Shows you what your comments will look like in “non-edit” mode and saves comments

Cancel

- Cancels all unsaved changes made to the page during your current work session

Submit

- Submit your comments to the CAISO. Submitted comments *cannot* be edited

Save

Save & Preview

Cancel

Comments cannot be edited once submitted

Submit

PROPOSAL DEVELOPMENT

DECISION

IMPLEMENTATION



Home > Stay Informed > Stakeholder Initiatives

Stakeholder initiative

Stakeholder input is vital to the success of ISO development and implementation of new market design, policies, and infrastructure planning. The stakeholder initiative process allows for a wide variety of stakeholders to engage and give valuable feedback through proposals, meetings, and comments, helping to shape the future of the ISO's energy market and operations.

Visit the ISO's [Annual policy initiatives roadmap page](#) to learn about the process timeline and locate a comprehensive catalog of all policy initiatives planned for the year ahead.

The ISO is preparing to launch a new stakeholder commenting tool, to learn more [view a webinar demonstration](#).

- Recurring stakeholder process
- Miscellaneous meetings
- Commenting tool



Questions

QUIZ



Poll Question



Where will the Word Document template be located in the new stakeholder commenting tool?

- A. In the exact same place as before, silly
- B. I know this one! It's on the same page where I will submit my comments
- C. I'm pretty sure I'd have to email CAISO for that
- D. I honestly have no clue

Poll Question



Should you upload your comments Word template in the attachments field?

- A. No way!
- B. Yes, I should always upload my completed template there
- C. I can...but it's only going to show up as a link
- D. Uhhhhhh...I'm going to need some more information

Stakeholder Commenting Tool Training

VIEWING OTHER COMMENTS

How to View Comments On an Initiative

- To view comments on an initiative, click on the **initiative name link** on the stakeholder page

Search for initiative 

STATUS: Active  

| Title | Proposal Development | Decision | Implementation |
|--|---|--|---|
| Aliso Canyon gas-electric coordination phase 5 | Oct 07, 2019 Draft tariff language | Dec 31, 2019 FERC approval (ER20-273) Oct 31, 2019 Tariff amendment filing (ER20-273) | |
| Capacity procurement mechanism soft offer cap | Q1 2020 Board of Governors meeting | | Oct 02, 2020 Deployment Oct 2020 Activation Implementation milestones |
| Coffee drinking facilitates social interaction | Apr 17, 2020 Straw proposal | | |
| Commitment cost enhancements tariff clarifications | Feb 04, 2020 Meeting Feb 18, 2020 Comments due Mar 25-26, 2020 Board of Governors meeting | | |

How to View Comments On an Initiative

- Click on the **View Comments** icon

Activities

| | | |
|-------------------------|--|---|
| This is a test activity | This is test text | |
| Web meeting |  Straw Proposal - Coffee Drinking Facilitates Social Interaction 04/17/2020 |  View comments |
| Web meeting |  Issue Paper - Coffee Drinking Facilitates Social Interaction 04/17/2020 |  View comments |



Viewing Comments Options

- The commenting tool will allow you to view comments by **Organization** or **Question**

Comments on Straw proposal

Export 

Coffee drinking facilitates social interaction

Comment period

04/24/2020 08:00 AM - 07/10/2020 05:00 PM

Submitting organizations

ABC Company, ABC XYZ, Arizona Public Service, CAISO, CAISO, CAISO - DMM, CPUC, dc energy, Idaho Power, Idaho Power Company, Middle River Power, LLC, MNO Company, Northern California Power Agency, NV Energy, Pacific Gas & Electric, PacifiCorp, Portland General Electric, Public Generating Pool, SMUD, Thompson Coburn LLP, XYZ Company

VIEW BY **Organization** Question

ABC Company

ABC XYZ

Arizona Public Service

CAISO

CAISO

CAISO - DMM

CPUC

ABC Company

Submitted on behalf of
ABC Company

1. Provide a summary, if desired

Powerex appreciates the opportunity to submit comments on CAISO's November 26, 2019 Federal Energy Regulatory Commission ("FERC") Order No. 831 – Import Bidding and Market Parameters Revised Straw Proposal. Powerex recognizes that the application of Order No. 831 to the CAISO market raises critical

Viewing Comments Options – By Organization

- You can view all of the organizations that submitted comments for the initiative in the **submitting organizations** field

Comments on Straw proposal

Coffee drinking facilitates social interaction

Comment period

04/24/2020 08:00 AM - 07/10/2020 05:00 PM

Submitting organizations

ABC Company, ABC XYZ, Arizona Public Service, CAISO, CAISO, CAISO - DMM, CPUC, dc energy, Idaho Power, Idaho Power Company, Middle River Power, LLC, MNO Company, Northern California Power Agency, NV Energy, Pacific Gas & Electric, PacifiCorp, Portland General Electric, Public Generating Pool, SMUD, Thompson Coburn LLP, XYZ Company



Export



VIEW BY

Organization

Question

Viewing Comments Options – By Organization

- You can also click on the organization name on the left column to navigate directly to that organization's comments

VIEW BY **Organization** Question

ABC Company
ABC XYZ
Arizona Public Service
CAISO
CAISO
CAISO - DMM
CPUC
dc energy
Idaho Power
Idaho Power Company
Middle River Power, LLC
MNO Company
Northern California Power Agency

ABC Company
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1. Provide a summary, if desired

Powerex appreciates the opportunity to submit comments on CAISO's November 26, 2019 Federal Energy Regulatory Commission ("FERC") Order No. 831 – Import Bidding and Market Parameters Revised Straw Proposal. Powerex recognizes that the application of Order No. 831 to the CAISO market raises critical issues and Powerex appreciates the significant time that CAISO is investing in discussions with stakeholders and California state agencies to develop a balanced approach that takes into account the views and interests of a broad array of stakeholders.

In Order No. 831, FERC directed each RTO to increase their offer caps to \$2,000/MWh out of concern that the existing \$1,000/MWh offer caps used by RTOs were preventing resources from recovering their costs and acting as a disincentive for resources to offer their supply into the market.[1] FERC also required each RTO to verify that any incremental energy offers submitted by internal generation resources that exceed \$1,000/MWh reasonably reflect the resource's actual or expected costs.[2] In the case of external

Viewing Comments Options – By Question

- When viewing comments by question, you can **click directly on the question** to navigate to those specific responses

Comments on Straw proposal

Export 

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VIEW BY **Organization** Question

Choose the question below to view related answers:

1. Provide a summary, if desired
2. Its been suggested that drinking coffee promotes social interaction, do you agree?
Please vote and support your position with an example.
3. All social interaction should take place at a minimum of 6 feet apart, with this in mind, suggest the best location for coffee consumption.
4. Do you feel offering a selection of food options will increase coffee consumption and social interaction?
5. Are there any additional questions or issues we should consider?
6. Please provide any additional comments.
Please elaborate.
7. Attachments

Viewing Comments Options – By Question

- When viewing comments by question, you can also use the **next** and **previous** links to navigate to other questions

[< Prev](#) **3. All social interaction should take place at a minimum of 6 feet apart, with this...** [Next >](#)

ABC Company

ABC XYZ

Arizona Public Service

CAISO

CAISO

ABC Company

Submitted on behalf of
ABC Company

Export and Print Buttons



- The Export button will export all comments into a PDF format

- The Print button will print the webpage in its current format



More About Exporting

- When exporting comments, you are able to select which organizations to include

Export ✕

Choose file type

PDF

Choose organizations

All

| | |
|-------------------------------|--|
| <input type="checkbox"/> PG&E | <input type="checkbox"/> PGE, Pacific Corp |
| <input type="checkbox"/> SMUD | <input type="checkbox"/> SMUD |

Stakeholder Commenting Tool Training

VIEWING YOUR COMMENTS

Viewing Your Comments

- Two options to view comments you have already saved and/or submitted (provided the comment period is still open):

Clicking on the
commenting tool
button

Clicking on the
submit
comments
button

- You will be able to view your organization's comments on a specific initiative using the above methods.
 - This is why it is essential that your organization names match when registering
 - Example: Jane Doe can create and save comments on an initiative and John Smith can edit and submit

Viewing Your Comments – Submit Comments Button

- Clicking on the **submit comments** button will allow you to see comments (and their status) for only that initiative

CAISO comments

[View all CAISO active comments](#)

Initiative: Aliso Canyon gas-electric coordination

| Title | Status | Due date | |
|--|---|----------------------|----------------------|
| Test comment template for user testing On behalf of: | NOT SUBMITTED Modified: 7/28/2020 12:29:31 PM | 7/31/2020 5:00:00 PM | Edit |

Open comment

[Aliso Canyon gas-electric coordination - Test comment template for user testing](#)
Due: Jul 31, 05:00 PM

[Close](#)

Viewing Your Comments – Commenting Tool Button

- Clicking on the **commenting tool** button will allow you to see comments (and their status) for all initiatives

Active CAISO comments

Once comments are published to www.caiso.com they will no longer appear in this list

| Title | Status | Due date | |
|--|--|----------------------|------|
| test test test 7-21 - Excess behind the meter production <i>On behalf of:</i> | NOT SUBMITTED Modified: | 7/22/2020 8:00:00 PM | Edit |
| test test test 7-21 - Excess behind the meter production <i>On behalf of:</i> | NOT SUBMITTED Modified: 7/21/2020 4:01:25 PM | 7/22/2020 8:00:00 PM | Edit |
| EDAM bundle 1 straw proposal - Extended day-ahead market | SUBMITTED 7/21/2020 1:35:39 PM | 7/24/2020 5:00:00 PM | View |
| July 17 SG test of commenting tool - Flexible ramping product refinements | DECLINED 7/17/2020 12:52:06 PM | 7/18/2020 8:00:00 AM | Edit |

All Open Comments

- You can also view all initiatives that are open to commenting under the **All open comments** field

All open comments

[Aliso Canyon gas-electric coordination phase 5 - Test comment template for user testing](#)

Due: Jul 31, 05:00 PM

Comment Status

Not Submitted

- Saved comments not yet submitted
- Editable by anyone in organization

Submitted

- Submitted to the CAISO
- No longer editable
- You will receive a confirmation email from Stakeholder Affairs

Declined

- Submitted but declined by the CAISO and returned to submitter for editing
- When declined, you will receive an email with the reason

Comment Status

Active Stacy Gibbs Super Organization comments

Once comments are published to www.caiso.com they will no longer appear in this list

| Title | Status | Due date | |
|--|--|----------------------|------|
| test test test 7-21 - Excess behind the meter production <i>On behalf of:</i> | NOT SUBMITTED Modified: | 7/22/2020 8:00:00 PM | Edit |
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| July 17 SG test of commenting tool - Flexible ramping product refinements | DECLINED 7/17/2020 12:52:06 PM | 7/18/2020 8:00:00 AM | Edit |

Comments already submitted are NOT editable



Questions

PROPOSAL DEVELOPMENT

DECISION

IMPLEMENTATION



Home > Stay Informed > Stakeholder Initiatives

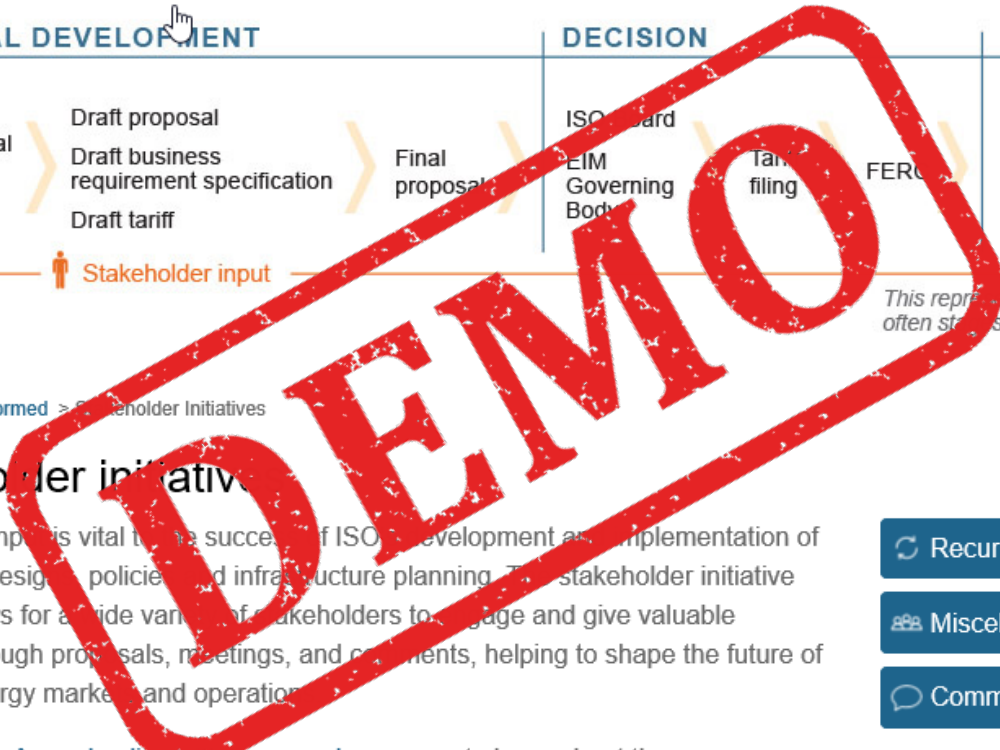
Stakeholder initiative

Stakeholder input is vital to the success of ISO development and implementation of new market design, policies, and infrastructure planning. The stakeholder initiative process allows for a wide variety of stakeholders to engage and give valuable feedback through proposals, meetings, and comments, helping to shape the future of the ISO's energy market and operations.

Visit the ISO's [Annual policy initiatives roadmap page](#) to learn about the process timeline and locate a comprehensive catalog of all policy initiatives planned for the year ahead.

- ☑ The ISO is preparing to launch a new stakeholder commenting tool, to learn more [view a webinar demonstration](#).

- 🔄 Recurring stakeholder process
- 🗨️ Miscellaneous meetings
- 💬 Commenting tool



QUIZ



Poll Question



Can multiple users within the same organization make edits to a comment before submitting to the CAISO?

- A. No, not really
- B. Yes! I can edit anyone's comments at any time!
- C. Yup! As long as we are showing in the same organization in the tool
- D. Multiple users? I thought we can only have one user

Poll Question



What does it mean when a comment shows as “declined” in the commenting tool?

- A. The CAISO never received your comment
- B. The CAISO received your comment but returned it to the submitter
- C. The comment is no longer “editable”
- D. Wait...comments can be declined??

Stakeholder Commenting Tool Training

TIMELINE AND NEXT STEPS

Stakeholder Commenting Tool Timeline Information

| Date | Milestone |
|--------------------|---|
| August 3, 2020 | Commenting tool registration opens |
| August 10, 2020 | Launch of commenting tool |
| August 10, 2020 | Post comments template via the tool for EIM Governance Review initiative, Hybrid Resources and EDAM |
| August 26, 2020 | Comments due for Hybrid Resources |
| August 28, 2020 | Comments due for EIM Governance Review |
| September 10, 2020 | Comments due for EDAM |

Commenting Tool Testing Feedback

We heard you!!

“*The tool limits the quality of the comments by only supporting plain text.*”

The commenting fields have been amended so they support additional items such as texts, tables, graphics, formulas, and footnotes!

Commenting Tool Testing Feedback

We heard you!!

“ The tool limits stakeholders’ feedback by requiring stakeholders to use the CAISO-provided comment template. ”

You have the ability to use your own template and simply cut and paste your responses into each question field. We have also added both a summary and additional comments field where you can document any issue you would like. You can also upload your template as an attachment. But remember—if you do that, your comments will only show as a link on the page!

Commenting Tool Testing Feedback

We heard you!!

“ Copying and pasting from Word documents and reformatting submissions into the CAISO submission tool will require too much additional time ”

We know that copying and pasting your comments to each question might take a little more time than the previous process. However, the time that you gain by being able to search and organize all the comments on an initiative should more than make up for your delay!

Resources

- The following resources will be posted on www.caiso.com
 - PowerPoint slide deck
 - Recording of web training session
- Questions about the commenting tool can go to ISOStakeholderAffairs@caiso.com



Poll Question



Now that you have attended this training, do you feel like you will be able to confidently use the new stakeholder commenting tool?

- A. Yup, I am good to go!
- B. I feel relatively confident, but I have some questions
- C. I think I want to wait for the launch to answer that
- D. Thanks for the training, but I am still confused. Eek!



Final Questions



Please take time to fill out our training evaluation!

For more detailed information on anything presented, please visit our website at:

www.caiso.com

Or send an email to:

ISOStakeholderAffairs@caiso.com

Stakeholder Commenting Tool Training

Q&A

Q: Will members of the public be able to view comments without having to register?

A: Yes, anyone can see these.

Q: What happens when someone retires or leaves a company and goes to another company, will they still be able to access their comments, or will they lose access?

A: If you changes organizations, contact SHA so they can edit your registration on the back end. Also, when leaving one organization and joining another, we assume that you would no longer have the use of your company email and would have a new email with your new organization. Stakeholder would need to re-register with new email address and organization. Comments are tied to the Company and email address that they were submitted to, but will still have read access, like the public.

Q: Will CAISO have any VPN blocks?

A: The only blocks would be if your VPN is blocking any public websites, but you do not need any specific network to access this tool. We would recommend testing your VPN.

Q: Is the Stakeholder Commenting process open now? (Stakeholder trying to register and is having error messages)

A: Yes. We will look at that and get back to him. (CAISO reached out and issue is resolved)

Q: Does 'active comments' mean that you are not past the deadline to submit comment?

A: What the screen would show when it says 'active comments' is anything that you may have opened and have not yet submitted. Also at the bottom of the screen, anything that you are available to comments on, if you choose to.

Q: That since more than 1 person from a company can edit a set of comments on this sites, how does that work? How does someone else get editing rights over comments that are submitted by someone else?

A: It is by organization name, which is why choosing a consistent organization name is so important. Also why the registration process takes a bit of time, for security reasons, as all of those organizations names and requests are coming through Stakeholder, as a second line of defense. Users who are connected to the same organization are able to edit that organization's comments

Q: Does 'Active Comments' mean it is not passed the deadline?

A: This will show for anything that you have not yet submitted, but have worked on.

Q: Once the template is downloaded, what is the purpose of needing to copy and paste into tool? Do you copy and paste each question?

A: Yes, this is correct. We provide a sample template, because a lot of times there are different collaborators on these comments, within an organization and this way stakeholders can collaborate on everything and then cut and paste once. The purpose of cutting and pasting is because when something is downloaded as a word document, it appears as a link. When you are actually copy and pasting into the tool, it provides additional functionality for organization, search abilities. If not entered thru the template, it would come up as a Word document

Q: So, you do not submit the template, you cut and paste each question from the template, into the tool/ application

A: Correct; the template has the same exact questions as the tool itself. You do not have to use the template, if you don't want to. But because I'm guessing that stakeholders usually go within your company and discuss write ups internally before you submitting to the ISO, that the download template it simply to give stakeholders the questions from the tool, so you don't have to keep revisiting the tool to get the questions, while building your responses. Again, you do need to question by question paste into the tool. If you choose not to, you may write directly into the tool, whatever you choose.

Q: Clarification needed with organization names when entering comments on behalf of multiple entities.

A: When entering comments on behalf of multiple entities, enter the organization names you are submitting on behalf of and if they have a joint name.

Q: Why won't the tool have the capability to enter in different colors and fonts, is there some reason why these will not be accepted?

A: To keep comments uniform in the tool under view comments.

Q: If entering comments thru an attachment in the tool, will they still be viewable to others? Will it appear only as a link?

A: Yes, If Stakeholders do not want to cut and paste into the tool and would rather submit template as a word document they will not be able to use all of the functional and exporting features for those comments, it will just show as a link. People can open and view, but none of those other features will work.

Q: On Stakeholder Initiative page you will either see 'View comment' or 'Submit comment', but you will not see both of them?

A: Correct; comment period will either be open and you can submit them, or the comment period will be closed and you can view.

Q: Will stakeholders not be able to see other organization's comments until commenting period is closed?

A: Correct; Stakeholders will not have the ability to view other organization's comments until the comment period has ended, and the comments have been posted (typically 1-2 days after commenting period has closed).

Q: Can hyperlinks be pasted into tool and will they be working?

A: Yes

Q: When submitting joint comments on behalf of other entities, how will the tool insure that the entity name matches the name they registered under? Since this is a free-form text box, do the names auto populate and if not, what happens if the names don't match? Will the joint comments associated with that company not show up when doing a free search for comments associated with that entity?

A: Yes; the formatting is free-form. When registering with a company, this is why it is important to ensure that when registering with a certain organization, the name needs to match. If there is a typo, hopefully SHA will catch this and correct and make sure that you are being attached to the correct organization, but if some reason it doesn't happen, then you are going to show as being in a different organization and when you submit comments you will not be able to edit each other's comments and essentially it would be as if you were with another company.

Q: When searching for joint entity comments on a certain initiative, will stakeholders be able to search those comments and find results?

A: Yes, it will show up, the joint name provided is the name you will find them under.

Q: When multiple people contribute or co-authored comments, is their 1 POC to submit comments and then list other authors in comment?

A: Yes; stakeholders may include in comments or they may add in summary, whatever stakeholders decide is best.

Q: When submitting joint comments and searching for the organization, can you search under the individual organization name, or will it appear under the group name only?

A: If you choose to submit on behalf of others, the comments will show under the group name, not the organization you are registered with and will have a small icon by it, listing all the companies

Q: What is the difference between printing using the 'PDF Export' option vs. 'Print in Current Format'?

A: Print in "Current format" will print in the Webpage format, vs. only printing the comments

Q: If a modification is needed, who/where will stakeholders need to go?

A: Stakeholders will need to contact SHA at isostakeholderaffairs.com and will be sent back for editing

Q: Understood from earlier that when comments say 'active', it means they have not yet submitted. She sees now that that there is an 'active' status showing with a submitted comment.

A: Comments will show as submitted until comment period is closed and will show as active until comment period has ended and comments have been approved and posted.

Q: What does “approved” or “declined” mean?

A: This is simply a cursory review. If there are blatant errors, mistakes, SHA will reach out and send back to submitter.

Q: Would the ISO ever “reject” a comment?

A: No; unless inappropriate.

Q: If stakeholders miss the deadline to submit comments, will the ISO give them a chance to still submit?

A: Yes; email and submit to SHA at: isostakeholderaffairs.com and they will assist.

Q: When submitting joint comments, can you search by question? Can you also search by entity?

A: Yes; it will show under the joint entity name and list individual companies and can also search by question.

Q: When multiple people from the same org have editing rights, how does the ISO screen? Does the ISO go back to the original submitter? Does the submitter see all people listed who have editing rights?

A: We approve when stakeholders register, but It is up to the org to approve the submitters and SHA will be able to identify by submitter’s email address.

Q: Will stakeholders be able to see how many people are registered under their org?

A: SHA can assist by viewing from the Admin view and can inform on who and how many people are registered and provide a list.

Q: If stakeholders start comments, but forget to submit, will the system prompt them to submit?

A: No; the tool does not currently have that function. The ISO will look into adding in the future.

Q: Do comments become instantly visible once commenting period closes, or is there a phased in process?

A: The process is similar to the current process, the comments will not be phased in, or visible before the commenting period closes and they have been published all together, unless there is a late submission.

Q: Will SH be able to tell which comments have been submitted past the deadline?

A: Yes; when you go to the view comments page you will be able to see next to the organization name that there will be a tag next to it that says submitted late.

Q: What if you are submitting a joint comment, but the group does not have a group name, can leave that blank? Is that okay?

A: It does require a group name. SH can put the names of the companies, and list them in the group name. No links are created through this.

Q: Is the tool going to be the only way to submit comments for the 3 initiatives that will open 8/10/20?

A: Yes