

Transmission Service and Market Scheduling Priorities Phase 2 (TSMSP 2)

Track 1 – Monthly Process



Today's Trainer

Dottie Vance
Customer Readiness
Trainer

Housekeeping



REMAIN MUTED

Keep yourself muted to minimize background noise



ASKING QUESTIONS

Unmute to ask verbal questions or write in the chat pod



RAISING HAND

Raise your hand using WebEx interactivity tools

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Our Meeting Agenda

Today we will cover...

- Review the background on the project
- Understand and walkthrough the application-specific details
- Prepare for Market Simulation and Readiness Activities

WHY ARE WE HERE?

For the wheeling-through scheduling priorities, the need arises as supply shortfalls across the western interconnection are contributing to increased dependence on import generation to serve load reliably.

Need: A workable framework for establishing market scheduling priority for wheeling-through the ISO system is a critical issue for external and internal load serving entities.

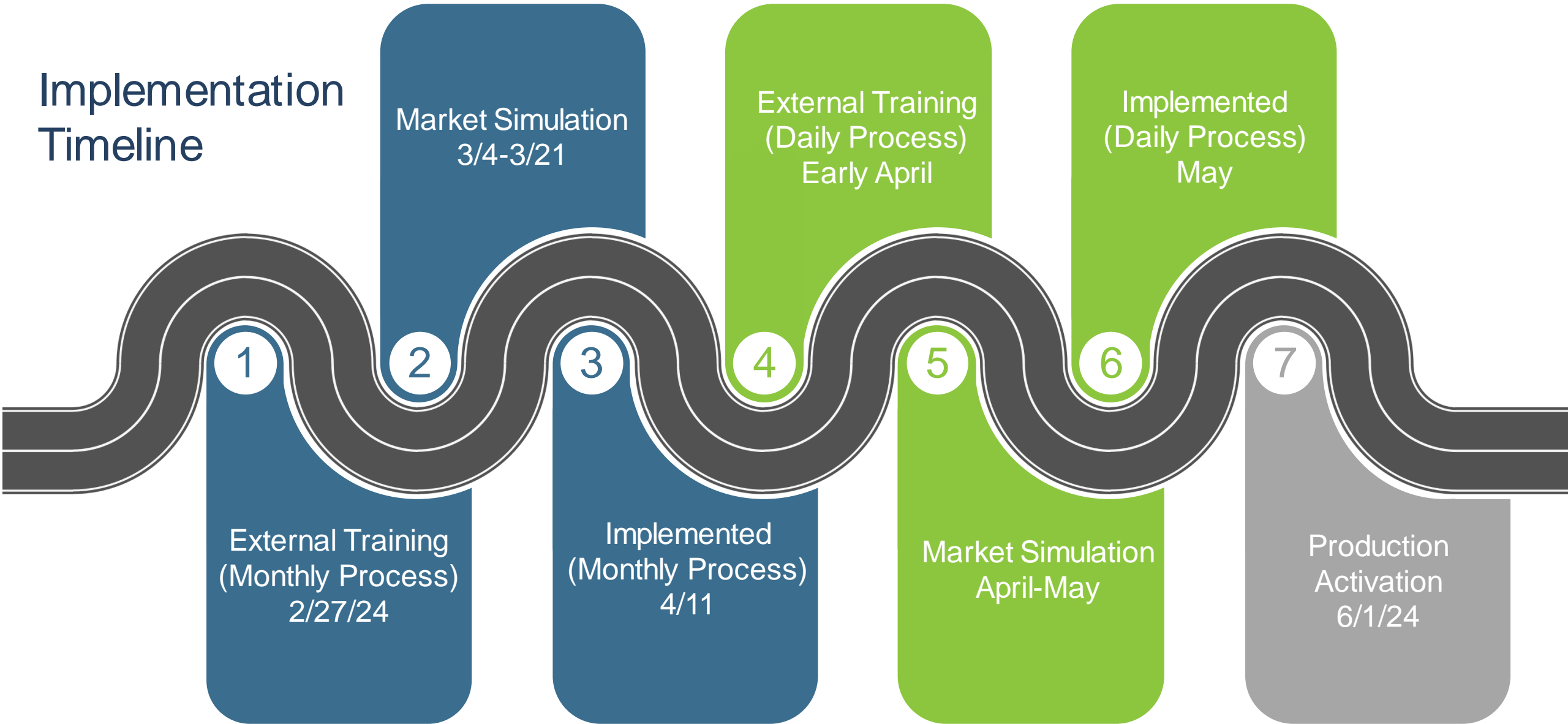


[PRR: 1548](#)

NEW PROCESS FOR ESTABLISHING WHEELING THROUGH PRIORITY

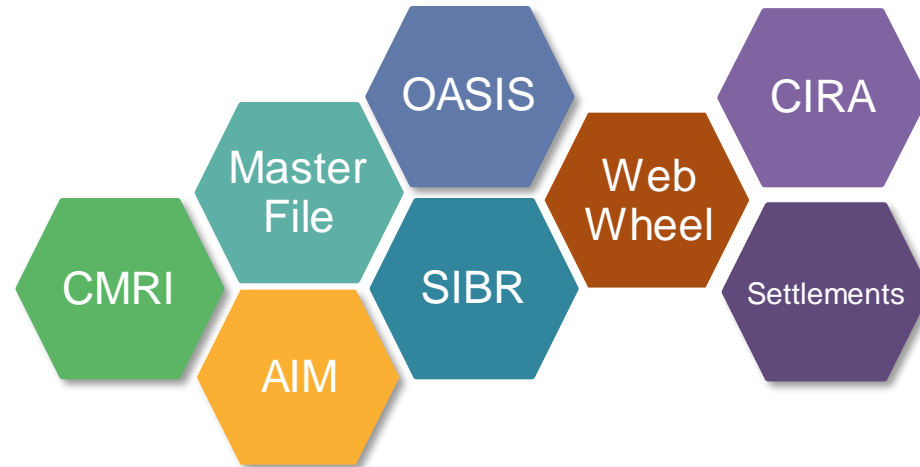
- **Available Transfer Capability (ATC)** is secured in advance on the ISO interties to establish wheeling through priority equal to ISO load.
 - ATC can be reserved in
 - Monthly increments (13-month horizon)
 - Daily increments (7-day horizon).
- Wheeling through transactions without secured ATC in advance will have a lower market clearing priority.

Implementation Timeline



For additional details, refer to the [Policy Initiative Page for Transmission Service and Market Scheduling Priorities](#) [link!](#)

Review Application Specific Details



What is webWheel?

01 New ISO Application

To access webWheel, users will need to have a proper certificate & register in MF.

This application shows user specific data (e.g., provisioned information)

02 This platform will be where participants:

- Submit and maintain power contracts
- Request Priority-Wheeling-Through (PWT)
- View/Validate PWT Awards



The link for webWheel will be located on the Market Participant Portal (prior to Market Simulation)

Master File (MF)

Section Focus

- Required actions for users in Master File

Users Have Two Options for Action Items in Master File

Master File



Need to Register

To access the new application (webWheel), users must first register in Master File:

- PT_WHEEL_SCHED = Y
- PT_WHEEL_MW is not needed

Timeline: 11 business days in advance to start

[New Intertie Resource Request template](#)



Already Registered

- ✓ Previously registered resources will remain
- ✓ The ISO will clear out previous PT_WHEEL_MW from TSMSP 1 entries
- ✓ Users can move forward with webWheel

Access and Identity Management (AIM)

Section Focus

- Certificate access for new application (webWheel)

Existing Scheduling Coordinators (SC) AIM Contracts

- SC Contract Types:
 - Scheduling Coordinator Agreement + MSA/SC
 - SCT – Scheduling Coordinator Agreement Only
- Associated Applications and Roles:
 - WEBWHEEL-OATI-WEBWHEEL READ ONLY
 - WEBWHEEL-OATI-WEBWHEEL READ/WRITE

What Questions Do You Have?



Unmute yourself

or



Raise your hand

webWheel

Section Focus

- Overview of participant dashboard and data tab
- Walk through submitting a power contract, requesting priority-wheeling-through (PWT), and reviewing priority-wheeling-through awards (PWT Awards).



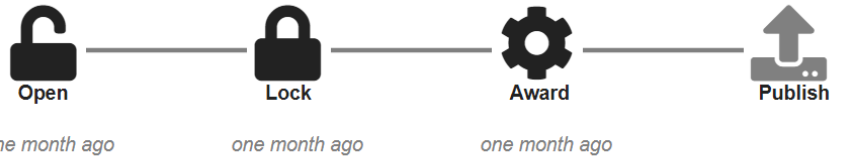
Reviewing webWheel Application

PARTICIPANT DASHBOARD & DATA TAB

Participant Dashboard



Submission Window Status



News and Announcements

Sri News
hello 6 days ago

Activity Log

ID	Participant	Contract	Product	Pro-Rata	Partial	Period Start	Period End	Request MW	Status
----	-------------	----------	---------	----------	---------	--------------	------------	------------	--------

No Records Have Been Found

PWT Request Counts

Contracts	Accepted	Rejected
-----------	----------	----------

Import Interties	Accepted	Rejected
------------------	----------	----------

Export Interties	Accepted	Rejected
------------------	----------	----------

Submission Window Status



Submission Window Status

Open — Lock — Award — Publish

one month ago one month ago one month ago

News and Announcements

Sri News
hello 6 days ago

Activity Log

ID	Participant	Contract	Product	Pro-Rata	Partial	Period Start	Period End	Request MW	Status
No Records Have Been Found									

PWT Request Counts

Contracts	Accepted	Rejected
-----------	----------	----------

Submission Window Status provides summary of where the submission process is at.

Open = PWT Requests are open
Lock = Submissions are closed
Award = Process for awarding requests
Published = Information published downstream

Interties	Accepted	Rejected
-----------	----------	----------

Export Interties	Accepted	Rejected
------------------	----------	----------

News and Announcements



Submission Window Status

Open — Lock — Award — Publish

one month ago one month ago one month ago

News and Announcements

Sri News
hello 6 days ago

Activity Log

ID	Participant	Contract	Product	Pro-Rata	Partial	Period Start	Period End	Request MW	Status
----	-------------	----------	---------	----------	---------	--------------	------------	------------	--------

News and Announcements
This area provides different messages to users letting them know what is happening

PWT Request Counts

Contracts	Accepted	Rejected
Import Interties	Accepted	Rejected
Export Interties	Accepted	Rejected

Activity Log



Participant Dashboard

Submission Window Status

Open *one month ago* | Lock *one month ago* | Award *one month ago* | Publish

News and Announcements

Sri News hello *6 days ago*

Activity Log

[Empty area for activity log entries]

ID	Participant	Contract	Product	Pro-Rata	Partial	Period Start	Period End	Request MW	Status
No Records Have Been Found									

PWT Request Counts

Contracts	Accepted	Rejected
Export Interties	Accepted	Rejected

Activity Log
This area is similar to "News and Announcements" as it provides updates on what actions have taken place.

PWT Request Counts



Participant Dashboard

Submission Window Status

Open *one month ago* Lock *one month ago* Award *one month ago* Publish

News and Announcements

Sri News hello *6 days ago*

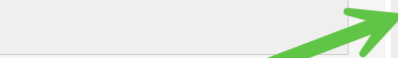
Activity Log

ID	Participant	Contract	Product	Pro-Rata	Partial	Period Start	Period End	Request MW	Status
No Records Have Been Found									

PWT Request Counts

Contracts	Accepted	Rejected
Import Interties	Accepted	Rejected
Export Interties	Accepted	Rejected

PWT Request Counts
This area shows participant's requests that have been submitted into the system.



Records Displayed on Participant Dashboard



OATI DEF Participant name California IS

Data Operations Reports Administration My Settings System

Participant D

Submission Window Status

Open Lock Publish

one month ago one month ago one month ago

News and Announcements

Sri News hello 6 days ago

Activity Log

ID	Participant	Contract	Product	Pro-Rata	Partial	Period Start	Period End	Request MW	Status
No Records Have Been Found									

PWT Request Counts

Contracts	Accepted	Rejected

Import Interties

Accepted	Rejected

Records
This area shows the participant's information. Remember, participants are restricted to only seeing their information.

Data Tab – Holidays

The screenshot shows the OATI web interface. At the top is a blue header with the OATI logo, a gear icon, and a dropdown menu set to 'DEF'. Below the header is a navigation bar with tabs for 'Data', 'Operations', 'Reports', 'Administration', 'My Settings', and 'System'. The 'Data' tab is active, and its dropdown menu is open, listing 'Holidays', 'Products', 'Participants', 'Intertie Points', 'Market Constraints', 'Intertie Constraint Map', 'Contracts', and 'Monthly ATC'. A green arrow points from the 'Holidays' menu item to a green-bordered callout box. The callout box contains the text: **Holidays**
Adhere to North American Electric
Reliability Corporation (NERC). Below the callout box, the text 'one month ago' is visible twice.

Data Tab – Products

The screenshot shows the OATI web interface. At the top is a blue header with the OATI logo, a settings gear icon, a dropdown menu showing 'DEF', and navigation icons for home, list, refresh, and search. Below the header is a navigation bar with tabs for Data, Operations, Reports, Administration, My Settings, and System. The 'Data' tab is active, and its dropdown menu is open, listing: Holidays, Products, Participants, Intertie Points, Market Constraints, Intertie Constraint Map, Contracts, and Monthly ATC. A green arrow points from the 'Products' menu item to a callout box. The callout box has a green border and contains the text: **Products**
Page that provides overview of the standard energy products organizations can pick from. Below the callout box, the text 'one month ago' is visible twice.

Products Page



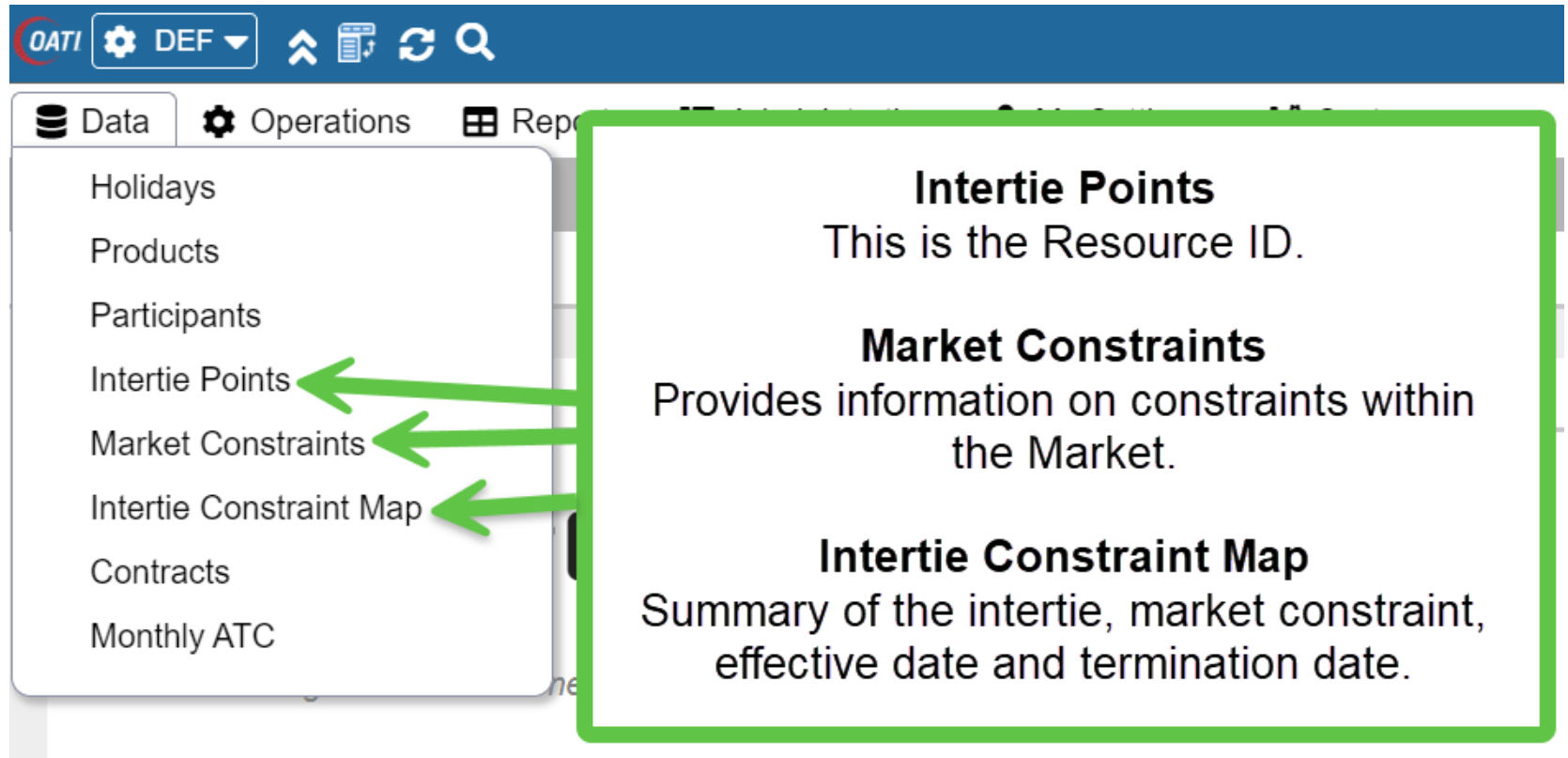
Products Summary ☰

Name ↑	Description	Enabled	System	Hours
1*16	Any day of the week, on-peak hours	Yes	Yes	Monday(7-22), Tuesday(7-22), Wednesday(7-22), Thursday(7-22), Friday(7-22), Saturday(7-22), Sunday(7-22)
1*24	Any day of the week, all hours	Yes	Yes	Monday(1-24), Tuesday(1-24), Wednesday(1-24), Thursday(1-24), Friday(1-24), Saturday(1-24), Sunday(1-24)
1*4	Any day of the week, hours 15-18	Yes	Yes	Monday(15-18), Tuesday(15-18), Wednesday(15-18), Thursday(15-18), Friday(15-18), Saturday(15-18), Sunday(15-18)
1*8	Any day of the week, off-peak hours	Yes	Yes	Monday(1-6, 23-24), Tuesday(1-6, 23-24), Wednesday(1-6, 23-24), Thursday(1-6, 23-24), Friday(1-6, 23-24), Saturday(1-6, 23-24), Sunday(1-6, 23-24)
2*16	Two weekend days, on-peak hours	Yes	Yes	Saturday(7-22), Sunday(7-22)
2*24	Two weekend days, all hours	Yes	Yes	Saturday(1-24), Sunday(1-24)
2*8	Two weekend days, off-peak hours	Yes	Yes	Saturday(1-6, 23-24), Sunday(1-6, 23-24)
5*16	Five weekdays, on-peak hours	Yes	Yes	Monday(7-22), Tuesday(7-22), Wednesday(7-22), Thursday(7-22), Friday(7-22)
5*24	Five weekdays, all hours	Yes	Yes	Monday(1-24), Tuesday(1-24), Wednesday(1-24), Thursday(1-24), Friday(1-24)
5*8	Five weekdays, off-peak hours	Yes	Yes	Monday(1-6, 23-24), Tuesday(1-6, 23-24), Wednesday(1-6, 23-24), Thursday(1-6, 23-24), Friday(1-6, 23-24)
6*16	Five weekdays and Saturday, on-peak hours	Yes	Yes	Monday(7-22), Tuesday(7-22), Wednesday(7-22), Thursday(7-22), Friday(7-22), Saturday(7-22)
6*24	Five weekdays and Saturday, all hours	Yes	Yes	Monday(1-24), Tuesday(1-24), Wednesday(1-24), Thursday(1-24), Friday(1-24), Saturday(1-24)
6*4	Five weekdays and Saturday, hours 15-18	Yes	Yes	Monday(15-18), Tuesday(15-18), Wednesday(15-18), Thursday(15-18), Friday(15-18), Saturday(15-18)
6*8	Five weekdays and Saturday, off-peak hours	Yes	Yes	Monday(1-6, 23-24), Tuesday(1-6, 23-24), Wednesday(1-6, 23-24), Thursday(1-6, 23-24), Friday(1-6, 23-24), Saturday(1-6, 23-24)
RD_1*2	Any Day, Two hours a day	Yes	No	Monday(23-24), Tuesday(23-24), Wednesday(23-24), Thursday(23-24), Friday(23-24), Saturday(23-24), Sunday(23-24), Holiday(23-24)

Data Tab – Participants

The screenshot shows the OATI web application interface. At the top, there is a blue header bar with the OATI logo, a settings icon, a dropdown menu labeled 'DEF', and several utility icons (home, list, refresh, search). Below the header is a navigation bar with tabs for 'Data', 'Operations', 'Reports', 'Administration', 'My Settings', and 'System'. The 'Data' tab is selected, and a dropdown menu is open, listing various data categories: 'Holidays', 'Products', 'Participants', 'Intertie Points', 'Market Constraints', 'Intertie Constraint Map', 'Contracts', and 'Monthly ATC'. The 'Participants' item is highlighted with a green arrow. A green-bordered callout box points to 'Participants' and contains the text: 'Participants Summary with Market ID, Name, Effective Data, and Termination Date.' Below the callout box, there are two faint text labels: 'one month ago' and 'one month ago'.

Data Tab – Intertie Points, Market Constraints & Intertie Constraint Map



The screenshot shows the OATI application interface. At the top is a blue header with the OATI logo, a settings gear icon, a dropdown menu labeled 'DEF', and navigation icons for home, list, refresh, and search. Below the header is a navigation bar with three tabs: 'Data' (selected), 'Operations', and 'Reports'. A dropdown menu is open under the 'Data' tab, listing the following items: Holidays, Products, Participants, Intertie Points, Market Constraints, Intertie Constraint Map, Contracts, and Monthly ATC. To the right of the menu is a large white callout box with a green border. This box contains three sections of text: 'Intertie Points' with the subtext 'This is the Resource ID.', 'Market Constraints' with the subtext 'Provides information on constraints within the Market.', and 'Intertie Constraint Map' with the subtext 'Summary of the intertie, market constraint, effective date and termination date.'. Three green arrows point from the callout box to the 'Intertie Points', 'Market Constraints', and 'Intertie Constraint Map' items in the dropdown menu.

Data Tab – Contracts

The screenshot shows the top navigation bar of the webWheel application. The 'Data' tab is selected, and its dropdown menu is open, listing several options: Holidays, Products, Participants, Intertie Points, Market Constraints, Intertie Constraint Map, Contracts, and Monthly ATC. The 'Contracts' option is highlighted with a green arrow pointing to it. A green-bordered callout box is positioned to the right of the 'Contracts' menu item, containing the text: **Contracts**
Summary of contracts registered in webWheel application.

Data Tab – Monthly Available Transfer Capability (ATC)

The screenshot shows the OATI web application interface. At the top, there is a navigation bar with the OATI logo, a settings icon, a dropdown menu labeled 'DEF', and several utility icons. Below this is a main navigation menu with tabs for 'Data', 'Operations', 'Reports', 'Administration', 'My Settings', and 'System'. The 'Data' tab is active, and its dropdown menu is open, listing various data categories: 'Holidays', 'Products', 'Participants', 'Intertie Points', 'Market Constraints', 'Intertie Constraint Map', 'Contracts', and 'Monthly ATC'. The 'Monthly ATC' option is highlighted with a green arrow. A green callout box with a white background and a green border points to the 'Monthly ATC' option and contains the text: 'Monthly ATC Summary of how much is available to put into their bids for PWT awards.'

The screenshot shows the 'Monthly ATC Summary' table. The table has a header row with columns for 'Market Constraint', 'Direction', and months from '3/2024' to '2/2025'. Below the header, there are two rows for 'Import' and 'Export' directions. The data cells are currently blank.

Market Constraint	Direction	3/2024	4/2024	5/2024	6/2024	7/2024	8/2024	9/2024	10/2024	11/2024	12/2024	1/2025	2/2025
	Import												
	Export												



Now that you have the basics...

REGISTERING A POWER CONTRACT

Maneuver to the Data Tab → Contracts

Contract ID	Name	Participant	Import Intertie	Export Intertie	Product	Period Start	Period End	Profile	1/2025	2/2025	3/2025	4/2025	5/2025	6/2025
No Records Have Been Found														

Registering a Power Contract in webWheel

Data Operations Reports Administration My Settings System

Participant Dashb... Contracts Contract

New Contract

Name:

Participant:

Import Intertie:

Export Intertie:

Product:

Periods: Next Year 2025

Profile Type: Flat

Capacity MW:

Name: Title of contract (the participant decided)

Participant: The ID of who is registering the contract

Import & Export Intertie: Resources desired for this contracts
This category will auto-filter import/export interties registered in Masterfile

Additional Attributes

Legal Attestation

I, with my knowledge and experience given my position with , attest that this submission meets the applicable attestation requirements of CAISO Tariff Section 23. I declare under penalty of perjury pursuant to 28 U.S.C. 1746 and the laws of the State of California that I have reviewed these requirements and the foregoing is true and correct.

Signature

Registering a Power Contract in webWheel (Cont.)

Data Operations Reports Administration My Settings System

Participant Dashb... Contracts Contract

New Contract

Name:

Participant:

Import Intertie:

Export Intertie:

Product:

Periods:

Profile Type:

Capacity MW:

Additional Attributes

Legal Attestation

I, with my knowledge and experience given my position with , attest that this submission meets the requirements of CAISO Tariff Section 23. I declare under penalty of perjury pursuant to 28 U.S.C. 1746 and the laws of the State of C... e requirements and the foregoing is true and correct.

Signature

Product: Energy contract type desired



Registering a Power Contract in webWheel (Cont.)

New Contract

Name:

Participant:

Import Intertie:

Export Intertie:

Product:

Periods: Next Year 2025

Profile Type: Flat

Capacity MW:

Periods: Picking for either the Monthly or Daily process

Additional Attributes

Legal Attestation

I, with my knowledge and experience given my position with , attest that this submission meets the applicable attestation requirements of CAISO Tariff Section 23. I declare under penalty of perjury pursuant to 28 U.S.C. 1746 and the laws of the State of California that I have reviewed these requirements and the foregoing is true and correct.

Signature

Registering a Power Contract in the Web Wheel Application

New Contract

Name:

Participant:

Import Intertie:

Export Intertie:

Product:

Periods: Next Year 2025

Profile Type: Flat

Capacity MW:

Profile Type: Two options to pick from (Flat or Variable).

Flat The one number value of MWs across the duration of the contract

Capacity MW: How many MWs is desired

Additional Attributes

Legal Attestation

I, with my knowledge and experience given my position with ,

attest that this submission meets the applicable attestation requirements of CAISO Tariff Section 23. I declare under penalty of perjury pursuant to 28 U.S.C. 1746 and the laws of the State of California that I have reviewed these requirements and the foregoing is true and correct.

Signature

Registering a Power Contract in webWheel (Cont.)

New Contract

Name:	<input type="text"/>	Month	Capacity MW
Participant:	<input type="text"/>	01/2025	
Import Intertie:	<input type="text"/>	02/2025	
Export Intertie:	<input type="text"/>	03/2025	
Product:	<input type="text"/>	04/2025	
Product:	<input type="text"/>	05/2025	
Periods:	Next Year 2025	06/2025	
Profile Type:	Variable	07/2025	
		08/2025	
		09/2025	
		10/2025	
		11/2025	
		12/2025	

Profile Type: Two options to pick from (Flat or Variable).
Variable is the different number values of MWs across the duration of the contract where the contract changes depending on the month.

Additional Attributes

Legal Attestation

I, with my knowledge and experience given my position with , attest that this submission meets the applicable attestation requirements of CAISO Tariff Section 23. I declare under penalty of perjury pursuant to 28 U.S.C. 1746 and the laws of the State of California that I have reviewed these requirements and the foregoing is true and correct.

Signature



Registering a Power Contract in webWheel (Cont.)

Data Operations Reports Administration My Settings System

Participant Dashb... x Contracts x **Contract** x

New Contract

Name:

Participant:

Import Intertie:

Export Intertie:

Product:

Periods:

Profile Type:

Capacity MW:

Located under Additional Attributes

Contact Reference & Counterparty
Information on where the contract is coming from or if a user would like a counter party be contracted

Additional Attributes

Contract Reference:

Counterparty:

Legal Attestation

Registering a Power Contract in webWheel (Cont.)

Data Operations Reports Administration My Settings System

Participant Dashb... Contracts Contract

New Contract

Name:

Participant:

Import Intertie:

Export Intertie:

Product:

Periods: Next Year 2025

Profile Type: Flat

Capacity MW:

Legal attestation: Please be sure to input the Name, Title, Department AND Company in the first box provided.

Once complete, click the save icon at the bottom of the screen.

Additional Attributes

Legal Attestation

I, with my knowledge and experience given my position with ,

attest that this submission meets the applicable attestation requirements of CAISO Tariff Section 23. I declare under penalty of perjury pursuant to 28 U.S.C. 1746 and the laws of the State of California that I have reviewed these requirements and the foregoing is true and correct.

Signature

What Questions Do You Have?



Unmute yourself

or



Raise your hand



After registering power contract

SUBMITTING PWT REQUESTS & VIEWING AWARDS

Once a Participant has Registered a Power Contract & When the Submission Window Opens....

The screenshot shows the OATI web application interface. At the top, there is a navigation bar with the OATI logo, a settings gear, a dropdown menu showing 'DEF', and icons for home, print, refresh, and search. Below this is a secondary navigation bar with links for Data, Operations, Reports, Administration, My Settings, and System. A dropdown menu is open under the 'Operations' link, listing 'PWT Requests', 'PWT Awards', 'Participant Dashboard', and 'Action Log'. A green arrow points to 'PWT Requests'. A green-bordered box contains the text: **PWT Requests**
Once the submission window opens, participants will be allowed to enter requests. Below the dropdown, there is a 'Subm' section with an open lock icon and the word 'Open', followed by three 'one month ago' timestamps.

[2024 Monthly Wheeling Through Priority Request Due Date](#)

Adding a New PWT Request



Data Operations Reports Administration My Settings System

Participant Dashb... PWT Requests

PWT Requests Summary

ID	Participant	Contract	Import Intertie	Export Intertie	Product	Accept Pro-Rata	Accept Partial	Period Type	Actual Hours	Status	Submission Window	1/2024	2/2024	3/2024
No Records Have Been Found														

Click the "new" icon to add a PWT Request

Creating PWT Request

Data Operations Reports Administration My Settings System

Participant Dashb... PWT Requests PWT Request

PWT Request

Participant: *

Contract: *

Import Intertie:

Export Intertie:

Product: *

Period Type: *

Periods: Month Range 06/2024 - 05/2025

Profile Type: *

Accept Pro-Rata:

Accept Partial:

By picking the desired **Participant** and **Contract**, the system will populate the **Import/Export Interties** and the defaulted **Product Type**.

Creating PWT Request (Cont.)

Data Operations Reports Administration My Settings System

Participant Dashb... PWT Requests PWT Request

PWT Request

Participant: *

Contract: *

Import Intertie:

Export Intertie:

Product: *

Period Type: *

Periods: Month Range 06/2024 - 05/2025

Profile Type: *

Accept Pro-Rata:

Accept Partial:

Period Type will be Monthly and the **Periods** submission can range depending on the desire (up to 12 months range period).

Creating PWT Request (Cont.)

Data Operations Reports Administration My Settings

Participant Dashb... PWT Awards PWT Requests PWT

PWT Request

Participant: *

Contract: *

Import Intertie:

Export Intertie:

Product: *

Period Type: *

Periods: Month Range -

Profile Type: *

Remaining MW:

Request MW:

Accept Pro-Rata:

Accept Partial:

This Profile Type is Flat.

Users will shown their remaining MW and can request the desired amount of MWs to use.

Creating PWT Request (Cont.)

Data Operations Reports Administration My Settings

Participant Dashb... x PWT Requests x PWT Request x

This Profile Type is Variable.

Users will be prompted to enter their requested MW as it correlates with the desired month

PWT Request

Participant: *

Contract: *

Import Intertie:

Export Intertie:

Product: *

Period Type: * Monthly

Periods: Month Range 06/2024 - 05/2025

Profile Type: * Variable

Accept Pro-Rata:

Accept Partial:

Month	Remaining MW	Request MW
06/2024	0	
07/2024	0	
08/2024	0	
09/2024	0	
10/2024	0	
11/2024	0	
12/2024	0	
01/2025	0	
02/2025	0	
03/2025	0	
04/2025	0	
05/2025	0	

Creating PWT Request (Cont.)

Data Operations Reports Administration My Settings

Participant Dashb... PWT Awards PWT Requests PWT

PWT Request

Participant: *

Contract: *

Import Intertie:

Export Intertie:

Product: *

Period Type: *

Periods: Month Range -

Profile Type: *

Remaining MW:

Request MW:

Accept Pro-Rata:

Accept Partial:

Accept Pro-Rata and **Accept Partial** are two check mark boxes users can decide to include in their request.

Clicking Pro-Rata and/or Partial

PRO-RATA

- Yes: Requests can be awarded up to the requested amount for the evaluation period (subset of MWs)**
- No: Requests must be awarded for the full amount for the evaluation period**

PARTIAL

- Yes: Requests can be awarded for each period included in the request duration (subset of months)**
- No: Requests must be awarded the same amount for all periods of the request**

Submitting the PWT Request – Status Column



Data Operations Reports Administration My Settings System

Participant Dashb... PWT Requests

PWT Requests Summary

ID	Participant	Contract	Import Intertie	Export Intertie	Product	Accept	Accept	Period Type	Period Start	Period End	Total Hours	Status	Submission Window	1/2024	2/2024	3/2024
<p>Status column will let participants know if a PWT Request has been 1) Accepted, 2) Awarded, or 3) Rejected</p>																

Reviewing PWT Awards

Participant	Contract	Import Intertie	Export Intertie	PWT Request ID	Submission Window	Product	Accept Pro-Rata	Accept Partial	Profile	2/2024
No Records Have Been Found										

What Questions Do You Have?



Unmute yourself

or



Raise your hand


Customer Interface for Resource Adequacy (CIRA)

Section Focus

- This section is for CAISO BAA LSEs only
- Reviewing how to submit non-RA Contracts in CIRA 'Historical and new'

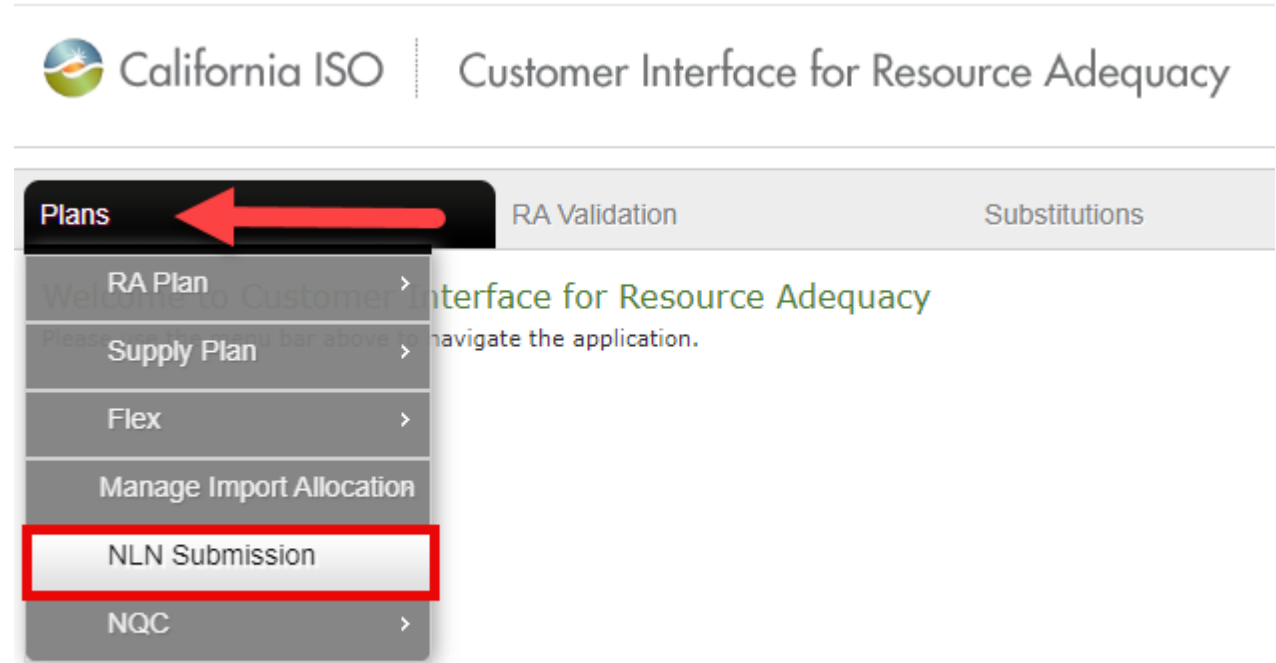
New Screen – Native Load Needs (NLN Submission)



NLN Submission 

To locate this new page:

CIRA >> Plans >>
NLN Submissions



Understand Native Load Needs (NLN) Submission Types




Two types of
NLN data



NLN1

Known as “shown RA contacts”
Currently stored in CIRA




NLN0

Known as “firm non-Resource Adequacy
import supply contract”
LSEs will enter this information into CIRA



Diving Deeper into the NLN Submission Page



Add/View Future NLN 

Clicking this will prompt users to either View or Enter their NLN data.

California ISO | Customer Interface for Resource Adequacy

Plans RA Validation Substitutions

Native Load Needs Submission

Month: February Year: 2024 LSE: -Select- Tie: -Select-

Add/View Future NLN Upload Historical Data View Historical Data Reset

Adding a Row to the Future NLN Table



Native Load Needs Submission

Month: February Year: 2024 LSE: -Select- Tie: -Select-

[Add/View Future NLN](#) [Upload Historical Data](#) [View Historical Data](#) [Reset](#)

Native Load Needs Submission Details

Add | Delete

Showing 1 to 7 of 7 entries

<input type="checkbox"/>	Month	Year	LSE	TIE	M+1 February 2024	M+12 January 2025	Contract Hours	Replacing RA Contract?	Replacement Intertie January 2025	Replacement (NLN) MW January 2025
<input type="checkbox"/>	February	2024						<input checked="" type="checkbox"/>		

Click the “Add” button to create a new row.
This page allows LSEs to input their information for **future** NLN.

Adding a Row to the Future NLN Table (Cont.)

LSEs submit data during designated submission windows

Example: For November 2024
M+12: 10/17/2023 – 11/2/2023
M+1: 9/17/2024 to 10/3/2024

Native Load Needs Submission

Month: February Year: 2024 LSE: -Select- Tie: []

Native Load Needs Submission Details

Month	Year	LSE	TIE	M+1	M+12	Contract Hours	Replacing RA Contract?	Replacement Intertie	Replacement (NLN) MW
February	2024	[]	[]	February 2024	January 2025	[]	<input checked="" type="checkbox"/>	[]	[]

Month & Year correlate with the desired submission request.

LSE & Tie are drop down options, depending on the user's resources.

Replacing RA Contract, LSEs must provide the Replacement Intertie and MW. Please note that Replacement MW cannot be greater than M+12 MW

Deleting a Row from Future NLN Table



Unsaved data will be deleted, do you wish to continue?

Native Load Needs Submission

Month: Year: LSE: Tie:

Native Load Needs Submission Details


Showing 1 to 7 of 7 entries

<input type="checkbox"/>	Month	Year	LSE	TIE	M+1 February 2024	M+12 January 2025	Contract Hours	Replacing RA Contract?	Replacement Intertie January 2025	Replacement (NLN) MW January 2025
<input checked="" type="checkbox"/>	February	2024	<input type="text" value="-Select-"/>	<input type="text" value="-Select-"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="text" value="-Select-"/>	<input type="text" value="0"/>

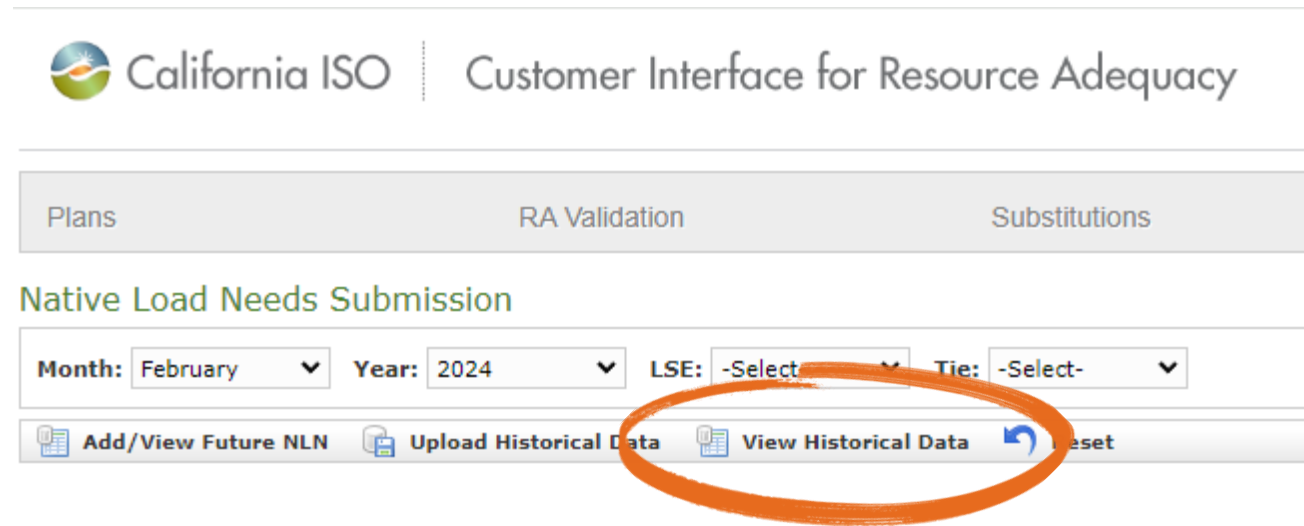
Select the row you would like to remove and click the “Delete” button – a pop up window will display at the top to confirm the selection.

Diving Deeper into the NLN Submission Page Cont.



View Historical Data 

Clicking this will prompt users view their historical data.



California ISO | Customer Interface for Resource Adequacy

Plans RA Validation Substitutions

Native Load Needs Submission

Month: February Year: 2024 LSE: -Select- Tie: -Select-

[Add/View Future NLN](#) [Upload Historical Data](#) [View Historical Data](#) [Reset](#)

Reviewing Historical NLN Data



Native Load Needs Submission

Month: Year: LSE: Tie:

[Add/View Future NLN](#) [Upload Historical Data](#) [View Historical Data](#) [Reset](#)

Native Load Needs Historical Data Details

Showing 1 to 14 of 14 entries

LSE	TIE	03/2022	04/2022	05/2022	06/2022	07/2022	08/2022	09/2022	10/2022	11/2022	12/2022
[Blurred content]											

Show entries

Download All Results

[CSV](#) [EXCEL](#) [PDF](#)

Users will be able to download historical data via CVS, Excel, and PDF.

Downloaded Historical Data – Template for Uploading Historical Data




	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	LSE	TIE	03/2021	04/2021	05/2021	06/2021	07/2021	08/2021	09/2021	10/2021	11/2021	12/2021	01/2022	02/2022
2	Title	Tie Name	1	2	3	4	5	6	7	8	9	10	11	12
3														



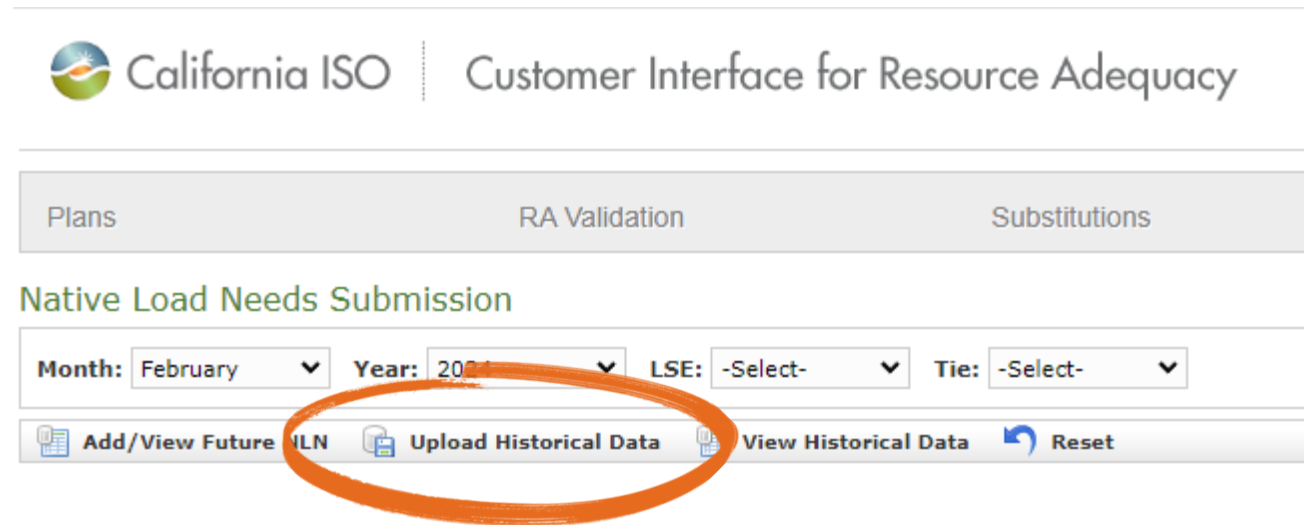
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	LSE	TIE	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22
2	Title	Tie Name	1	2	3	4	5	6	7	8	9	10	11	12
3														

Diving Deeper into the NLN Submission Page Cont.



Upload Historical Data 

Clicking this will prompt users to upload their historical data (in order to do so, users must check an attestation box).



California ISO | Customer Interface for Resource Adequacy

Plans RA Validation Substitutions

Native Load Needs Submission

Month: February Year: 2024 LSE: -Select- Tie: -Select-

[Add/View Future ILN](#) [Upload Historical Data](#) [View Historical Data](#) [Reset](#)

Uploading Historical Data



Native Load Needs Submission

Month: February ▼ Year: 2024 ▼ LSE: -Select- ▼ Tie: -Select- ▼

Add/View Future NLN Upload Historical Data View Historical Data Reset

Upload NLN0 Historical Data

Upload File: No file chosen


I attest that this submission meets the applicable attestation requirements of CAISO Tariff Section 23.
I declare under penalty of perjury pursuant to 28 U.S.C. 1746 and the laws of the State of California that I have reviewed these requirements and the foregoing is true and correct.

Upload

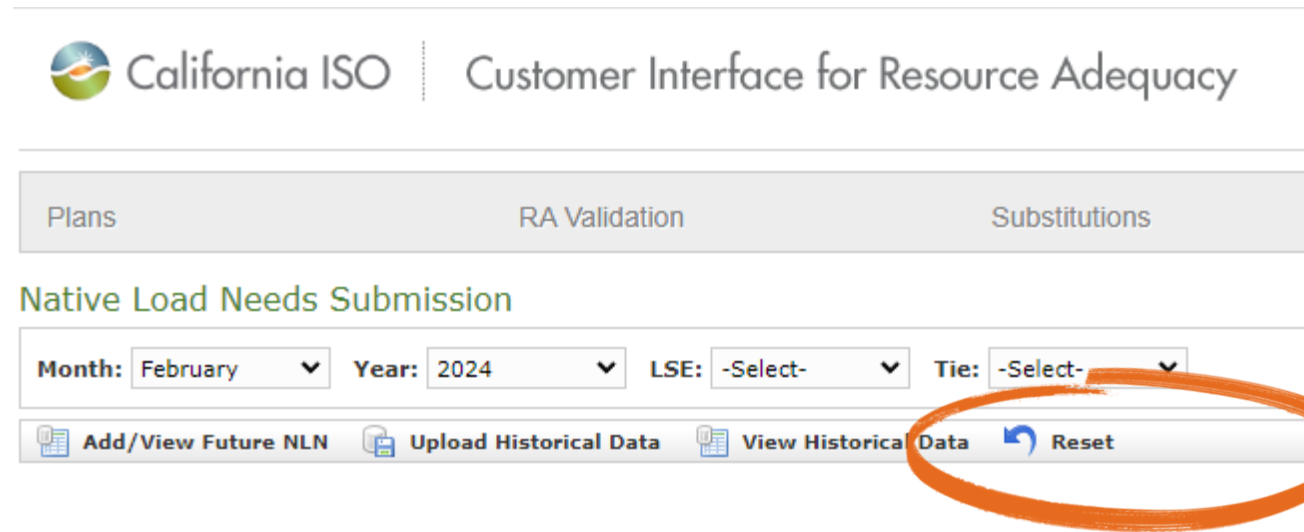
To upload Historical Data, please refer to how data is downloaded in “View Historical Data” [next slide]
Files must be CSV or Excel format.

Diving Deeper into the NLN Submission Page Cont.



Reset 

Clicking this will prompt users reset filters and clears the data on the User Interface.



California ISO | Customer Interface for Resource Adequacy

Plans RA Validation Substitutions

Native Load Needs Submission

Month: February Year: 2024 LSE: -Select- Tie: -Select-

[Add/View Future NLN](#) [Upload Historical Data](#) [View Historical Data](#) [Reset](#)

What Questions Do You Have?



Unmute yourself

or



Raise your hand

Scheduling Infrastructure and Business Rules (SIBR)

Section Focus

- Recapping user expectations in SIBR

SCs Scheduling Wheeling Remains the Same

- Review: [SIBR User Guide Section 3.2.8 Wheeling Bid Walkthrough](#)

What Happens

When it is time to be rewarded PWT, the results are sent to SIBR to be stored and validated

User's Responsibilities

Participants must validate the resources **Import** and **Export** belong to the same contract and that they scheduled for the wheel transaction

There can only be one counter resource per Wheeling Transaction for the trading hour.

Open Access Same-Time Information System (OASIS)

Section Focus

- Review new report “ATC for PWT Requests” for the monthly process

- Current Transmission Usage
- Transmission Outages
- Transmission Interface Usage
- Market Available Transmission Capacity
- ATC for PWT Requests

Welcome to the California ISO Open Access Same-Time System (OASIS) site. On OASIS you will find real-time data and its Market, such as system demand status, market prices and market results.

New Report on OASIS, under the Transmission tab called "ATC for PWT Requests"



Standards Information

- North American Energy Standards Board (NAESB)
- ISO Business Practice Manuals
- Available Transfer Capability Information

Transmission Information

- Base Case Data
- Interconnection Study Statistics

System Help

- All technical specifications and artifacts for OASIS are available on the [ISO Developer site](#). Self-registration is required to access the site.
- To download data without using the OASIS interface, see [How to use report URLs to download OASIS data](#) on the ISO Developer site.
- Access non-technical OASIS reference documents on www.caiso.com

[Open Access Same-Time System \(OASIS\) link](#)

New Report ATC for PWT Requests – *Monthly Process*

Opr Date: 02/07/2024 31 Horizon: Monthly Market Constraint: [ALL] Apply Reset

Download XML Download CSV

ATC for PWT Requests

1 - 20 of 108

Opr Date	Horizon	Constraint Name	Direction	PWT ATC	Priority-Wheeling-Through Awards	Available Transfer Capability (ATC)	Total Transfer Capability (TTC)	Native Load Needs (NLN)	Transmission Reliability Margin (TRM)
02/01/2024	Monthly		Export						
02/01/2024	Monthly		Import						
02/01/2024	Monthly		Export						
02/01/2024	Monthly		Import						
02/01/2024	Monthly		Export						
02/01/2024	Monthly		Import						

This report displays: calculated initial PWT ATC values and components Priority-Wheeling-Through Awards (PWT), Total Transfer Capability (TTC), Native Load Needs (NLN), and Transmission Reliability Margin (TRM) for Rolling 12-Month period for PWT Requests.

- Current Month + the window

[Tech Specs Posted – OASIS Interface Specification](#)

Downloading the Report – *Monthly Process*

Opr Date: 02/07/2024 31 Horizon: Monthly Market Constraint: [ALL]

ATC for PWT Requests

1 - 20 of 108

Opr Date	Horizon	Constraint Name	Direction	PWT ATC	Priority-Wheeling-Through Awards Available Transfer Capability (ATC)	Total Transfer Capability (TTC)	Native Load Needs (NLN)	Transmission Reliability Margin (TRM)
02/01/2024	Monthly		Export					
02/01/2024	Monthly		Import					
02/01/2024	Monthly		Export					
02/01/2024	Monthly		Import					
02/01/2024	Monthly		Export					
02/01/2024	Monthly		Import					

The **MONTHLY** group zip will contain the data for selected month (1 Month)

What Questions Do You Have?



Unmute yourself

or



Raise your hand

Settlements

Section Focus

- Review settlement impacts for PWT

Updates to the Wheel Export Quantity PC

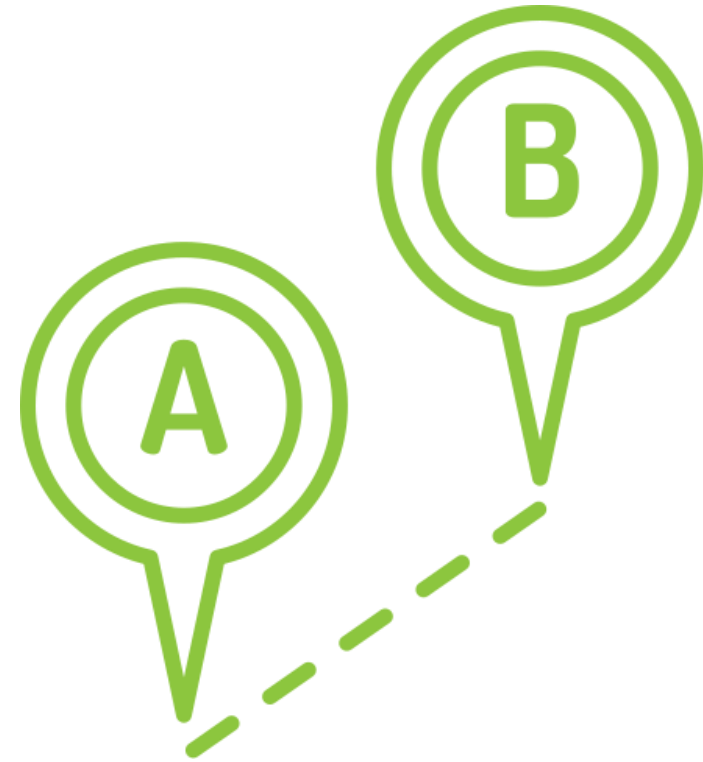
- Wheel Export Quantity Pre-calculation modified
 - Resale calculation & original PWT transaction + existing export quantity calculations
- Indirectly impacts
 - High Voltage Wheeling Access Charge allocation (CC 382)
 - Low Voltage Wheeling Access Charge allocation (CC 383)

To review CGPCWheelExportQuantity Document : [Release Planning](#) >> Summer 2024 settlements release technical documents >> Transmission service and market scheduling priorities phase 2


Let's Walk Through Some Examples Together

An entity registers an **Importing** contract at Point A and an **Exporting** contract at Point B.

There are a few scenarios that could occur with their settlement statements.



Example – Entity usage is less than the awarded PWT capacity



Monthly Awards: 100 MW
Daily Awards: 20 MW
Total Awarded MWs: 120 MW
Schedule: 80 MWs
(did not need 40 of the awarded MWs)


WAC Charge

120 MW

***New requirement that WAC is charged against wheeling-through capacity, if its schedule is less**

WAC – Wheeling Access Charge

Example – Entity usage is greater than the awarded PWT capacity



Monthly Awards: 100 MW
Daily Awards: 20 MW
Total Awarded MWs: 120 MW
Schedule: 150 MWs
(needed an additional 30MWs)

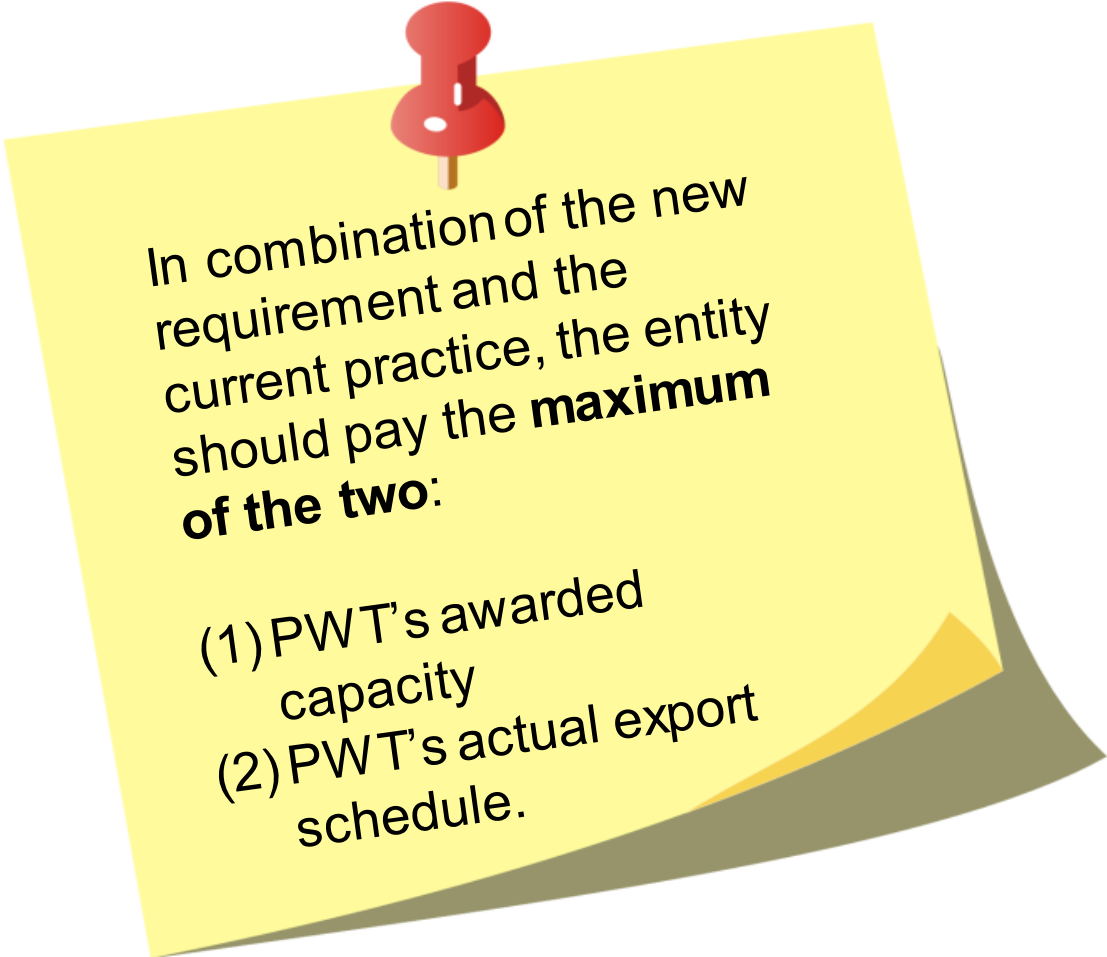
WAC Charge

150 MW

***It is a current practice that WAC is charged against wheeling-through schedules**

WAC – Wheeling Access Charge

Let's Recap the Settlement's Examples



In combination of the new requirement and the current practice, the entity should pay the **maximum of the two**:

- (1) PWT's awarded capacity
- (2) PWT's actual export schedule.

[CG PC Wheel Export Quantity 5.6](#)

What Questions Do You Have?



Unmute yourself

or



Raise your hand

A line chart with a bar chart background. The line chart has 10 data points with values: 6.8524, 9.2357, 2.9514, 7.3571, 5.6817, 8.6739, 3.1958, 0.1738, 7.5739, and 4.7452. Each point has an upward or downward arrow indicating the change from the previous point. The bar chart below has 10 bars of varying heights. A white horizontal bar is located below the first data point of the line chart.

Market Simulation Activities

Section Focus

- Unstructured Guided Scenarios

Market Simulation

TSMSP2 Unstructured Guided Market Sim starts on **March 4, 2024**

- View the [CAISO public calendar](#) for full schedule
- View the scenario on the [Release Planning](#) page

Monthly Market Sim					Map Stage Outage	
		E2E				
		2/26 - 3/1		3/4 - 3/8/2024	3/11 - 3/15/2024	3/17- 3/20/2024
Target Month		April		May		June
Monthly window	3 month duration	April - June		May - Jul		June - August
CIRA send data						
ETCC Send ATC values	Before submission window opens					
Open Submission Window	Monday 6am	2/26		3/4		3/17
Close Submission Window	Wednesday 5pm	2/28		3/6		3/19
Publish results	Thursday 6am	2/29		3/7		3/20
webWheel -> ETCC -> OASIS						

Functional Environment Options for CIDI Cases

CONTACT CUSTOMER SUPPORT
TELL US HOW WE CAN HELP

* SCID

* Functional Environment
--None--
--None--
Production
Market Simulation
Release
RC Integration
RC Shadow Operations
Parallel Operations
Request

Review for Price Correction

Manual Reference Level Change Request

* Subject

- Inquiries not directly related to Market Simulation issues & when there is no environment impact
 - Ex. Business Requirements Specifications (BRS) comments, implementation questions, feedback, etc.
- Contact: release@caiso.com

CONTACT CUSTOMER SUPPORT
TELL US HOW WE CAN HELP

* SCID

* Functional Environment
--None--
--None--
Production
Market Simulation
Release
RC Integration
RC Shadow Operations
Parallel Operations
Request

Review for Price Correction

Manual Reference Level Change Request

* Subject

- Inquires that are related to the MAP-Stage Environments (non-production)
 - Ex. Connectivity, unanticipated simulation results, etc.
- Contact: MarketSim@caiso.com

What Questions Do You Have?



Unmute yourself

or



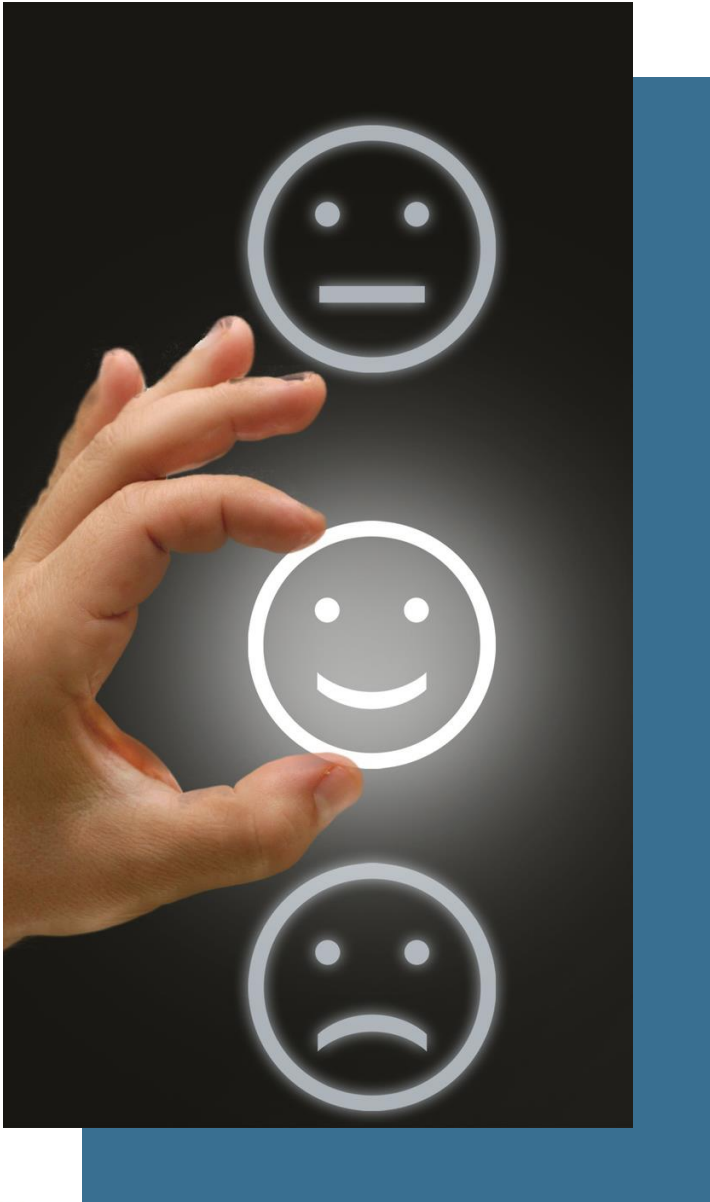
Raise your hand



Wrap Up

Summary, Q&A

- What's happening next.



Tell us How we Did

Takes 3-5 minutes to complete

Helps us improve future training

Link: <https://www.surveymonkey.com/r/caisocoursesurvey>

Thank you for your participation!



For clarification on anything presented in this training, send an email to:
CustomerReadiness@caiso.com

For any other questions or stakeholder specific questions or concerns, please
[submit a CIDI ticket.](#)

Additional Slides

APPENDIX



Reference Links

Business Practice Manual changes:

[BPM Change Management](#)

Business Requirements Specification:

<https://www.caiso.com/Documents/BusinessRequirementsSpecification-TransmissionServiceandMarketSchedulingPrioritiesPhase2.pdf>

Initiative webpage:

<https://stakeholdercenter.caiso.com/StakeholderInitiatives/Transmission-service-and-market-scheduling-priorities>



Reference Links

Market Simulation Structured Scenarios:

<https://www.caiso.com/Documents/MarketSimulationStructuredScenarios-Transmissionserviceandmarketschedulingpriorities-phase2.pdf>



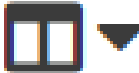



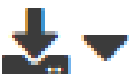

Technical Specifications – located on the [ISO's Developer Site](#) which provides detailed descriptions of the API changes for:

- OASIS

Training Material: TSMSP1

<https://www.caiso.com/Documents/Presentation-Transmission-Service-Market-Scheduling-Priorities-Phase1-Training.pdf>

Getting to know webWheel table features

-  New contract
-  Filter results
-  Column configuration & resetting filters
-  Font display
-  Display views
-  Print
-  Download (xlsx or CSV)
-  Refresh

SIBR Example of Export/Import

- There can be a one to many association for Export to Import with a PWT position MW. The Export and Import together per hour in the record are unique.
 - *ExportA* with *ImportB* for 45MW
 - *ExportA* with *ImportC* for 25MW
 - *ExportB* with *ImportA* for 30MW
 - *ExportC* with *ImportB* for 10MW
- There can only be one counter resource per Wheeling Transaction for the trading hour.
- *ExportA* can use either *ImportB* or *ImportC* but not both for a trade hour.

Scheduling Infrastructure & Business Rules (SIBR) terminology

- The following terms relate to self-schedules submitted in SIBR:
 - PT export [or **SS-STD (Self-Schedule Standard) in SIBR UI**]:
 - Self-schedule with designated resource
 - LPT export [or **SS-LPT in SIBR UI**]:
 - Self-schedule with no identified resource
 - PT wheel:
 - Self-scheduled wheel that meets tariff criteria for high priority wheeling through transaction
- For a refresher, please refer to the [Transmission Service and Market Scheduling Priorities Phase 1 \(TSMSP1\) training](#)

Wheels in SIBR are a bit more complex. The wheel will indicate **SS-STD** from the import side and could be **SS-STD** or **SS-LPT** from the export side. Note: If the wheel is on a registered intertie, the export cannot name a supporting resource.