 <b>California ISO</b> <small>Your Link to Power</small>	<b>Operations Support</b>	<b>Process No.</b>	
<b>Qualified Reporting Entity (QRE) Service Request Process</b>	<b>Version No.</b>	1.0	
	<b>Effective Date</b>	8/28/2008	
	<b>Distribution Restriction:</b>	None	

## Overview

### Introduction


The Western Renewable Energy Generation Information System (WREGIS) was developed in response to policies set by the California Legislature, Western Governors' Association (WGA), and the California Energy Commission. WREGIS is an independent, renewable energy database for the region covered by the Western Electricity Coordinating Council (WECC).

The role of the Qualified Reporting Entity (QRE) is to submit meter data associated with renewable energy on behalf of the Generator Owner using the WREGIS application. Once an Owner-Applicant requests the California Independent System Operator (CAISO) be designated as its QRE and the CAISO approves the service request, the CAISO will perform the services required by reporting meter data associated with renewable energy on behalf of the Generator Owner on a monthly basis. The CAISO will report such data to the WREGIS application per the WECC administered program requirements.

To be eligible to participate within the California Independent System Operator (CAISO) QRE Program, a Generator Owner must submit a completed and signed QRE Service Request Form and Qualified Reporting Entity Service Agreement (QRESA). Prior to approval of this service, the Owner-Applicant must be an ISO Polled Metered Entity and have a valid Terms of Use Agreement (TOU) with WREGIS. This document describes the QRE application process including roles and responsibilities of those involved in the process.

### In this Procedure


Topic	See Page
<b>Overview</b>	
Roles and Responsibilities	<a href="#">2</a>
Data Timeline	<a href="#">3</a>
Before you Begin	<a href="#">4</a>
<b>Qualified Reporting Entity Application</b>	
QRE Portfolio – Criteria	<a href="#">5</a>
Required Application Documentation	<a href="#">5</a>
Timeline	<a href="#">6</a>
Application Instructions	<a href="#">7</a>

 <b>California ISO</b> Your Link to Power	<b>Operations Support</b>	<b>Process No.</b>	
<b>Qualified Reporting Entity (QRE) Service Request Process</b>	<b>Version No.</b>		1.0
	<b>Effective Date</b>		8/28/2008
	<b>Distribution Restriction:</b>		None

## Overview, Continued

### Roles and Responsibilities


<b>Implementer</b>	<b>Role and Responsibility</b>
Owner-Applicant	<ul style="list-style-type: none"> <li>▪ Ensure all agreements with WREGIS/WECC and CAISO are signed/approved/filed with appropriate entity.</li> <li>▪ Submit completed Qualified Reporting Entity Request Form for new or updates to existing Portfolios, including all required documentation.</li> <li>▪ Submit completed QRESA.</li> <li>▪ Notify the CAISO QRE Coordinator of any changes to the application in a timely manner.</li> <li>▪ Promptly respond to inquiries from the CAISO QRE Coordinator.</li> </ul>
CAISO QRE Coordinator	<ul style="list-style-type: none"> <li>▪ Promptly review all related documents for completeness.</li> <li>▪ Take necessary steps to move the application through the CAISO QRE process in a timely manner.</li> <li>▪ Promptly respond to inquiries from the Owner-Applicant, including status of their application.</li> <li>▪ Notify Owner-Applicant of any concerns or questions associated with application information.</li> <li>▪ Submit to Owner-Applicant a copy of the approved Service Request Form with additional CAISO information and Service Effective Date upon approval.</li> <li>▪ Submit Owner-Applicants meter data for approved portfolio on a monthly basis.</li> </ul>
CAISO Technical Review Team	<ul style="list-style-type: none"> <li>▪ Promptly review information related to all Generation Sites.</li> <li>▪ Promptly notify the CAISO QRE Coordinator of any questions/ concerns associated with the Generation Site information during review process.</li> </ul>
CAISO Contract Implementation Team	<ul style="list-style-type: none"> <li>▪ Begin coordination of the QRESA in a timely manner.</li> <li>▪ Notify the CAISO QRE Coordinator of implementation progress at appropriate times during the process.</li> <li>▪ Return copy of fully executed QRESA to Owner-Applicant.</li> </ul>

 <b>California ISO</b> <small>Your Link to Power</small>	<b>Operations Support</b>	<b>Process No.</b>	
<b>Qualified Reporting Entity (QRE) Service Request Process</b>		<b>Version No.</b>	1.0
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		<b>Distribution Restriction:</b>	None

## Overview, Continued

### Data Timeline


<b>Term</b>	<b>Definition</b>
Data Submission (CAISO)	While Generation Output Reporting within WREGIS is structured to allow data to be submitted 75 days <u>after</u> the end of the Current Period Generation Month, the CAISO will make every effort to ensure that available meter data is posted within 5 business days following the end of such month barring any meter communication problems associated with the meter.
Data Approval (Account Holder / Generator Owner)	Upon receipt of WREGIS notification of QRE meter data submittal (WREGIS Accepted), meter data should be reviewed and approved within 10-Business days.
Data Disputes	The Owner-Applicant will notify the CAISO QRE Coordinator of any data discrepancies within 10-Business days of file acceptance within WREGIS in order for resolution to occur.

 <b>California ISO</b> <small>Your Link to Power</small>	<b>Operations Support</b>	<b>Process No.</b>	
<b>Qualified Reporting Entity (QRE) Service Request Process</b>	<b>Version No.</b>	1.0	
	<b>Effective Date</b>	8/28/2008	
	<b>Distribution Restriction:</b>	None	

## Overview, Continued

### Before You Begin

<b>Step</b>	<b>Action</b>	<b>If Not...</b>
<b>1</b>	Gather necessary Generating information for completing the QRE Request form: <ul style="list-style-type: none"> <li>• Site Name and Site Address.</li> <li>• Meter Device ID associated with each meter.</li> <li>• Scheduling Coordinator Name associated with Generator Unit.</li> <li>• Identification of Local Regulatory Authority</li> </ul>	The application will be put on hold until all required information is received.
<b>2</b>	Complete and Sign the QRESA prior to submitting to the CAISO.	Missing information will delay processing.
<b>3</b>	Submit completed, original QRE Service Request Form and QRESA hardcopies to:  California ISO Operations Data & Compliance, QRE Coordinator 151 Blue Ravine Road Folsom, CA 95630	

 <b>California ISO</b> Your Link to Power	<b>Operations Support</b>	<b>Process No.</b>	
<b>Qualified Reporting Entity (QRE) Service Request Process</b>	<b>Version No.</b>		1.0
	<b>Effective Date</b>		8/28/2008
	<b>Distribution Restriction:</b>		None

## Qualified Reporting Entity Service Request Process

### QRE Portfolio Criteria


QRE Portfolios are subject to the following:

	<b>Criteria</b>
<b>1</b>	Each Generating Resource must be a part of a PGA/MSA, QF PGA, or MSS agreement.
<b>2</b>	Likewise, each QRE meter must be subject to a Meter Service Agreement (“MSA”) for CAISO Metered Entities.
<b>3</b>	Each Generator meter must be installed per the CAISO Revenue Metering Deployment Guide located at: <a href="http://www.caiso.com/docs/2001/08/28/2001082815023715721.doc">http://www.caiso.com/docs/2001/08/28/2001082815023715721.doc</a> . <i>Note:</i> This criterion can be in progress or completed at the time of application submittal. If installation is in progress and the application is complete the application will be put on-hold until the meter installation is complete and certified by a CAISO meter engineer. Once the meter installation is certified, the application will be reviewed for approval and implementation into CAISO systems.

### Required Application Documentation

A completed QRE Request Package includes:


<b>Step</b>	<b>Documentation</b>
<b>1</b>	Complete and Signed QRE Service Request Form.
<b>2</b>	Complete and Signed QRESA.

 <b>California ISO</b> <small>Your Link to Power</small>	<b>Operations Support</b>	<b>Process No.</b>	
<b>Qualified Reporting Entity (QRE) Service Request Process</b>		<b>Version No.</b>	1.0
		<b>Effective Date</b>	8/28/2008
		<b>Distribution Restriction:</b>	None

## Qualified Reporting Entity Service Request Process, *Continued*

### Timeline

Timeline	Actions
Determination of a Completed Application:	The following actions will take place following a submitted QRE Portfolio Application: <ul style="list-style-type: none"> <li>▪ The CAISO QRE Coordinator will determine if all required information has been received by the CAISO.</li> <li>▪ The CAISO QRE Coordinator will verify if CAISO documentation is complete or in progress.</li> <li>▪ The CAISO Technical Review Team will perform an initial review to validate if application contains the appropriate Generation Site information to support the proposed QRE Portfolio.</li> </ul>
QRE Portfolio Approval and Systems Implementation:	Following a completed application where all additional work related to meter installation, contract revisions, or coordination with other entities is completed, the following actions will take place: <ul style="list-style-type: none"> <li>▪ The QRE Coordinator will determine the earliest effective Trade Date for the QRE Portfolio based on Data availability and WREGIS Certificate Issuance Cycle.</li> <li>▪ The CAISO QRE Coordinator will notify the owner-applicant of the proposed effective Trade Date.</li> </ul>
<p><b>If all documentation is completed for the QRE application, but meter installation and certification, contract revisions, or coordination with the relevant utility or energy service provider is still needed, then the application status will be complete, but the application process will remain on-hold until those items are completed. The QRE Portfolio approval and changes to CAISO systems will <u>not</u> begin until such items are completed.</b></p>	


 <b>California ISO</b> <small>Your Link to Power</small>	<b>Operations Support</b>	<b>Process No.</b>	
<b>Qualified Reporting Entity (QRE) Service Request Process</b>		<b>Version No.</b>	1.0
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## Qualified Reporting Entity Service Request Process, *Continued*

**Application Instructions**

Implementer	Action
Owner-Applicant	Completes the QRE Service Request Form and QRESA.
	Mails the completed and signed documents to the QRE Coordinator.
CAISO QRE Coordinator	Reviews application(s) and required documentation for completeness.
	If the application is <b>not complete</b> , contacts the Owner-Applicant via email or phone regarding missing and/or inaccurate information. <i>Note:</i> If the initial application submitted is not complete, the timeline stated above restarts once all required documentation is received.
	If the application is <b>complete</b> , sends the completed application to the CAISO Technical Team for review.

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 <b>California ISO</b> Your Link to Power	<b>Operations Support</b>	<b>Process No.</b>	
<b>Qualified Reporting Entity (QRE) Service Request Process</b>	<b>Version No.</b>		1.0
	<b>Effective Date</b>		8/28/2008
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## Qualified Reporting Entity Service Request Process, *Continued*

### Application Instructions *continued*

<b>Implementer</b>	<b>Action</b>
<b>If the application is approved...</b>	
CAISO QRE Coordinator	<p>Determines soonest possible effective Trade Date for QRE Portfolio implementation.</p> <p><i>Note:</i> The effective Trade Date will be the earliest first day of the month based on data availability and WREGIS data submittal guidelines.</p> <p>Notifies the Owner-Applicant of the suggested effective Trade Date and designated Reporting Entity Unit ID</p>

<b>Implementer</b>	<b>Action</b>
<b>If the application is denied...</b>	
CAISO QRE Coordinator	Notifies the Owner-Applicant of the decision and asks the Owner-Applicant if they wish to terminate the request or resubmit a revised request.
Owner-Applicant	<p>Responds to the CAISO QRE Coordinator with decision to resubmit or terminate request.</p> <p><i>Note:</i> If the decision is made at a later date to submit a QRE Portfolio application that includes any resources in a previously denied application,</p> <ul style="list-style-type: none"> <li>• It will be treated as a new application,</li> <li>• Must comply with the same requirements, and</li> <li>• Follow the same process flow described above.</li> </ul>