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## Purpose


Provides guidelines to manually Dispatch and Schedule Energy on the interties in the event of a HASP Market failure, critical application failures that affect HASP results, forecasting errors, and other reliability reasons that require a correction of Imbalance Energy for the next operating hour.

Additionally this procedure outlines the necessary communication, processes, and documentation for Manual Dispatch (Energy or Capacity) of Intertie resources.

## 1. Responsibilities

<b>Scheduling Coordinator (SC)</b>	Submits Bids for RT Energy imports/export Bids before the HASP deadline, which is 75 minutes prior to the start of the Operating Hour and monitor ADS.
<b>ISO Real-Time Market Desk</b>	Determines the requirement for RT Energy and dispatches the associated RT and Capacity Energy Bids through ADS.

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<b>ISO Generation Desk</b>	Approves the Dispatch from RTM and communicates any changes to the Transmission Dispatcher.
<b>ISO Transmission Desk</b>	Confirms availability of Transfer Capability on the specific Intertie, manually dispatches Energy by calling the responsible SC and ensures that Market Awards are entered into the Interchange transaction scheduler, automatically or manually.
<b>ISO Shift Manager Desk</b>	If the resources needed to maintain system reliability in a timely manner are not available through normal ISO market procedures, the Shift Manager is authorized and required to direct ISO Real-Time (RT) personnel to arrange Manual Dispatch through ISO Bid List (SIBR/FIT).

## 2. Scope/Applicability

### 2.1. Background

The ISO has the responsibility to maintain System Reliability and take immediate action to maintain or re-establish required or necessary Operating Reserves. A Manual Dispatch on an Interconnection is used for procuring additional Energy or reducing excess Energy that was not awarded by the ISO market. A Manual Dispatch can be used either in the event of a Supply deficiency event, an Overgeneration event, or in response to a HASP/RTM failure or other critical application failure that causes Imbalance Energy to affect reliability. The ISO can buy from or sell to entities other than ISO Market Participants during periods when the ISO determines that it may not be able to maintain the Reserve Margin in future hours or resources in the ISO Bid List (SIBR/FIT) are insufficient. Any such purchases or sales must be settled consistent with procedures specified in the CAISO Tariff and the BPMs.


In order to reduce disputes, the ISO Real-Time Operations personnel are responsible for clear communications of Manual Dispatch with SCs.

**Note:** *Entering manually dispatched interties into the RTN application satisfies logging requirements. A log entry will only be required if the requisite Resource ID, Transaction ID, is not in RTN and said resource is manually dispatched.*

### 2.2. Scope/ Applicability

This procedure applies to the responsible Scheduling Coordinator, the RTM Operator, the ISO Generation Desk, the Transmission Dispatcher, and the ISO Shift Manager Desk. If the Intertie resource has submitted a bid in the RTM market for the operating hour then it will be settled at ‘bid or better’ price, however the determination of whether the transaction is settled

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at the bid price or a better price is not determined by Real-Time operations. This process occurs as part of the settlements process.

### 3. Procedure Detail

#### 3.1. Manual Dispatch of Interchange Transactions

The following describes the Manual Dispatch of Transactions utilizing Bids submitted in HASP that were not awarded in the HASP process and sent to ADS, in coordination with the responsible SC. This could be due to Market Disruption, Software Limitation, Transmission Outage, System Emergency (or prevention thereof), Overgeneration or Conditions beyond the control of the ISO.

#### RTM Commodities Bid List


The Transmission Dispatcher secures the HASP/RTM commodities Bid list from FIT. At a minimum, the display includes the following information:

- Price
- Tie point at which the Bid was submitted
- Responsible SC which submitted the RT Energy Bid
- Market ID for the Interchange transaction
- Stack Type (Increment or Decrement)
- MW value

**Note:** Typically, ADS Interchange Dispatch Instructions are automatically dispatched to SCs with awarded Energy Bids. However, in the event of a HASP Market Failure, it may be necessary to manually Dispatch HASP/RTM Market Bids from the commodities Bid list, if available in FIT, and then enter the associated market awards into Interchange transaction scheduler.

Take the following actions to issue a manual dispatch:

ISO Generation Desk, ISO Shift Manager Desk
<ol style="list-style-type: none"> <li>1. <b>Determine</b> the need for a manual dispatch on the ISO Interties per ISO Operating Procedures <a href="#">2210 Real-Time Market Activities</a> and <a href="#">4420 System Emergency</a>.</li> <li>2. <b>Inform</b> the Transmission Dispatcher of the amount, Inc or Dec, and location.</li> </ol>

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ISO Transmission Desk
<ol style="list-style-type: none"> <li>1. <b>Utilize</b>, whenever possible, as times allows, resources in the ISO Bid List (SIBR/FIT), and dispatch these Intertie resources in merit order.</li> <li>2. <b>Verify</b> there is available room on the selected intertie to ensure the energy and any associated capacity can be delivered.</li> <li>3. If the HASP/RTM fails or is not reliable for an hour: <ul style="list-style-type: none"> <li>• <b>Use</b> the previous hour's bids.</li> </ul> </li> <li>4. If the HASP/RTM fails or is not reliable for multiple hours: <ul style="list-style-type: none"> <li>• <b>Use</b> the last set of valid bids.</li> </ul> </li> <li>5. <b>Establish</b> with the entity clear verbal agreements with the following information: <ul style="list-style-type: none"> <li>• Market ID</li> <li>• Accepted GOTO MWs</li> <li>• Hour-ending</li> <li>• Agreed up-on Price or state "Bid or Better"</li> </ul> </li> </ol>


### 3.2. Manual Dispatch Interchange Accounting

Take the following actions to create a market award in Interchange transaction scheduler and E-Tag the bi-lateral arrangements, as required by Manual Dispatch non-market Interchange accounting:

ISO Transmission Desk
<ol style="list-style-type: none"> <li>1. <b>Request</b> the Scheduling Coordinator/Purchasing Selling Entity (PSE) to create an E-Tag.</li> </ol>

Scheduling Coordinator (SC), Purchasing-Selling Entity (PSE)								
<ol style="list-style-type: none"> <li>1. <b>SC/PSE to submit</b> NERC E-Tags to match the manual dispatch. <ul style="list-style-type: none"> <li>• If a Resource ID was used for the manual dispatch: <b>Include</b> the following in the MISC field of the E-Tag Physical Path:</li> </ul> </li> </ol>								
<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #cccccc;">Token</th> <th style="background-color: #cccccc;">Value</th> </tr> </thead> <tbody> <tr> <td>CAISO_CONTRACT</td> <td>"NONE" for Market Transmission</td> </tr> <tr> <td>CAISO_PRODUCT</td> <td>"ENGY"</td> </tr> <tr> <td>CAISO_RES_ID</td> <td>Resource ID as registered in the ISO Master File</td> </tr> </tbody> </table>	Token	Value	CAISO_CONTRACT	"NONE" for Market Transmission	CAISO_PRODUCT	"ENGY"	CAISO_RES_ID	Resource ID as registered in the ISO Master File
Token	Value							
CAISO_CONTRACT	"NONE" for Market Transmission							
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<b>Scheduling Coordinator (SC), Purchasing-Selling Entity (PSE)</b>
---


2. If a Transaction ID was used for the manual dispatch:

- **Indicate** the Transaction ID in the OASIS field of the E-Tag:
- **Include** the following in the OASIS field:

Transmission Allocation			
TP	Owner	Product	OASIS
“_____”	“_____”	“_____”	“_____”
CISO	“_____”	“_____”	XXXX-XXXX_XXX-XXXX-XXXX- X-X-X-XXXX

<b>ISO Transmission Desk</b>
------------------------------

1. **Create/Update** Interchange transaction scheduler Market Award using information provided on the E-Tag or as agreed upon over the phone with the SC/PSE.
2. **Confirm** Market ID: Market ID.
3. **Confirm** SCID: Use valid SC ID if available, otherwise use ZISO.
4. Log the Manual Dispatch in the ED tool of market software. For more information on how to log in RTN, see ISO Desktop Procedure [INT-029 Manual Dispatch on the Interties](#).
5. If the Resource ID/Transaction ID does not exist in RTN, **log** in SLIC:
  - HE
  - Instruction Type
  - Reason
  - Accepted GOTO MWs
  - Short Description
  - Market ID
  - The reason for Manual Dispatch transaction, i.e. HASP/RTM failure or ISO supply deficiency

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### 3.3. Manual Dispatch via an Intermediary Entity

When canvassing for Manual Dispatch Energy during an ISO Supply deficiency event, if an entity is able to provide/receive Energy but is unwilling to do business directly with the ISO, then perform the following steps:


ISO Transmission Desk
<ol style="list-style-type: none"> <li>1. <b>Contact/canvas</b> third parties <b>and inform</b> the third party that an entity is able to provide/receive Energy, but is unwilling to do business with the ISO directly and requests that another entity act as an intermediary, with the ISO.</li> <li>2. If the third party entity accepts the request to act as an intermediary: <ul style="list-style-type: none"> <li>• <b>Communicate, record, and document</b> the agreement identical to a normal Manual Dispatch with the intermediary third party, per instruction in previous steps with two (2) additional considerations: <ul style="list-style-type: none"> <li>○ The agreed upon price is between the third party intermediary and ISO. Third party intermediary should include all costs (ISO and provider/receiver) when determining the selling price to the ISO.</li> <li>○ If the Resource ID/Transaction ID does not exist in RTN: <ul style="list-style-type: none"> <li>▪ The SLIC log entry must include explanation of the intermediary arrangement such as, <ul style="list-style-type: none"> <li>– Entity requiring an intermediary</li> <li>– Contact person</li> <li>– Name of any entities identified as acceptable Energy providers/receivers</li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ol> <p><i><b>Note:</b> The cost of the Manual Dispatch Energy/Capacity will be charged to ISO Load and not to either of the entities involved.</i></p>

### 3.4. Manual Dispatch Transaction Records

Take the following actions to create a SLIC log entry:

ISO Transmission Desk
<ol style="list-style-type: none"> <li>1. <b>Complete</b> a SLIC log entry: <ul style="list-style-type: none"> <li>• If the Resource ID/Transaction ID does not exist in RTN, which includes the detailed transaction information from <a href="#">Section 3.1</a>, along with the reason for the Manual Dispatch request. <ul style="list-style-type: none"> <li>○ <b>Ensure</b> the SLIC log entry is flagged to the Correction 96 HR report.</li> </ul> </li> <li>• If the Resource ID/Transaction ID does not exist in RTN. <ul style="list-style-type: none"> <li>○ <b>Log</b> the following required entries into SLIC: <ul style="list-style-type: none"> <li>▪ <u>Log Type</u> – RT Scheduling.</li> <li>▪ <u>Title</u> – EDE Instructions for Interties/Corrections-96 Hour.</li> </ul> </li> </ul> </li> </ul> </li> </ol>

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ISO Transmission Desk
<ul style="list-style-type: none"> <li>▪ <u>Event DTS Date</u> – The effective date of the ED. This is the date the energy is supplied <b>and</b> NOT the date the ED entities are contacted, which may be different for exceptional dispatches.</li> <li>▪ <u>Event DTS Time</u> – The effective time of the ED. This is the time the energy/capacity is supplied <b>and</b> NOT the time the ED entities are contacted.</li> <li>▪ <u>Short Description</u> – Provide a short description of the event.</li> <li>▪ <u>Operating Date</u> – The effective date of the MD. This will be the same as the Event DTS Date.</li> <li>▪ <u>HE</u> – The effective time of the MD, in hour ending format.</li> <li>▪ <u>Reason</u> – Depending on the reason for the ED, choose either Market Disruption, System Energy, or Unit DE commitment of RAS Resource during TX Maintenance.</li> <li>▪ <u>Market ID</u> – Each Resource ID or Transaction ID that is manually dispatched should be listed only once.</li> <li>▪ <u>Resource available MW value</u> for the associated Market ID. This will reflect the SIBR/FIT market bid and what the Transmission Dispatcher has manually changed to the market award, to reflect the manual dispatch.</li> </ul>

## 4. Supporting Information

### Operationally Affected Parties


Shared with **the** Public.

### References

Resources studied in the development of this procedure and that may have an effect upon some steps taken herein include but are not limited to:

CAISO Tariff	Sections 34.9.1 and 42.1.5
ISO Operating Procedure	<a href="#">2210 Real-Time Market Activities</a>
NERC Requirements	
WECC Criterion	
Other References	

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## Definitions

Unless the context otherwise indicates, any word or expression defined in the Master Definitions Supplement to the CAISO Tariff shall have that meaning when capitalized in this Operating Procedure.

The following additional terms are capitalized in this Operating Procedure when used as defined below:


<b>Automatic Dispatch System (ADS)</b>	ISO electronic automatic Dispatch system which issues automatic Dispatch Instructions to the Responsible SC, when a RT Market Energy Bid is awarded by RTM.
<b>Non-Market Participants</b>	Refers to Capacity or Energy transactions with entities other than SCs or entities represented by SCs, in the ISO markets. These transactions are with entities with which the ISO has no SC Agreement.
<b>Interchange Transaction Scheduler</b>	The Interchange transaction scheduler program manages Interchange transactions, provides Net Scheduled Interchange (NSI) to EMS and RTM, and Facilitates hourly NSI and Net Actual Interchange (NAI) check-out with adjacent Balancing Authorities (BA). NSI for each hour is based upon implemented Interchange Schedules (NERC E-Tags) requested and submitted by the Market Participant's SC/PSE.

## Version History

Version	Change	Date
6.5	Sections 2.1, 2.2 & 3.4: Updated to reflect that logging of manually dispatched ties no longer requires a SLIC log unless that resource does not exist in RTN.	8/11/2015
6.6	Converted procedure to Centric	4/06/2016
6.7	Section 3.1: Corrected RTM Commodities Bid Listing subsection title. Section 3.2: Updated Token column reverting back to CAISO, as it was changed in error. Replaced references of Shift Supervisor with Shift Manager. Replaced references of e-Tag with E-Tag. Minor grammar and format changes.	11/1/2017
6.8	Sections 1, 3.1, 3.2, 3.3, & 3.4: Changed all instances of Interchange Scheduling Desk/Interchange Scheduler to Transmission Desk/Transmission Dispatcher.	7/03/2019

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Version	Change	Date
	Section 2.1: Removed the word ISO from supply deficiency and Overgeneration event in order to allow the procedure to cover a larger scope of work. Added the term Emergency Resource ID to the note, since we are incorporating Emergency Resources in Section 3.1 of the Procedure. Section 2.2: Added a sentence discussing this procedure's applicability to Balancing Authority (BA)-to-BA reliability related transactions. Section 3.1: Changed title of section Manual Dispatch of Interchange Transactions. Combined Steps 4 and 5 to have the procedure read better and more efficiently. Added the term Price to the list of terms. Added an additional set of steps for BA-to-BA reliability related manual dispatches. Revised Sections 3.1 and 3.2 to remove Emergency Assistance related verbiage. Clarified language throughout the procedure. Section 3.2: Deleted MRTU from the Resource ID Value box. Minor format and grammar updates.	
7.0	Periodic Review: Minor edits for consistency, format and grammar updates and removed history prior to 5-years.	11/24/2020

## 5. Periodic Review Procedure

### Review Criteria & Incorporation of Changes

There are no specific criteria for reviewing or changing this document, follow instructions in ISO Operating Procedure 5510.

### Frequency

Every **three (3)** Years.

## Appendix

No references at this time.

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