



California ISO

# Settlement User Group

January 06, 2021

10:00 a.m. – 11:00 a.m. (Pacific Time)

| Web Conference Information  | Conference Call Information   |
|---|---|
| <p>Web Address: <a href="https://caiso.webex.com/meet/settlementuser">https://caiso.webex.com/meet/settlementuser</a></p> <p>Meeting Number: 961 854 046</p> <p>Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter your phone number you will use during the call. You will be called by the conference shortly.</p> | <p>US Toll Free: 1-844-517-1271</p> <p>US Toll : +1- 682-268-6591</p> <p>Access Code: 961 854 046</p> |

Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publically available on the ISO web page for a limited time following the meeting. The recording, and any related transcriptions, should not be reprinted without the ISO's permission. Hyperlinks in blue in PDF copy.

The recording will be posted on our website and be available for a short period of time until Jan 20, 2021.

Please mute your phone and do not put it on hold while the discussion is going on in order to eliminate background noise. There will be an opportunity to ask questions after each topic, but before asking your question, please state your name and affiliation. Thank you.



mute



# Settlement User Group Agenda

Wednesday, January 6, 2020

10:00 a.m. – 11:00 a.m. (Pacific Time)

| Time            | Topic  | Presenter  |
|-----------------|--|--|
| ▪ 10:00 – 10:02 | ▪ Welcome and Introduction   | ▪ Tyler DuBeshter  |
| ▪ 10:02 – 11:00 | ▪ Settlements <ul style="list-style-type: none"><li>▪ RC Services</li><li>▪ MSTT – effective TD 1/1/2021 is live</li><li>▪ PRR 1299 – Spin Non Spin No Pay Quantity</li><li>▪ Winter Market Simulation Settlement Updates</li><li>▪ Customer Readiness 2021 Training</li></ul> | ▪ Karen Voong<br>▪ Karen Voong<br>▪ Manoj George<br>▪ Assad Al- Baijat<br>▪ Cynthia Hinman |

# RC Services Update

## RC Services

- Informational Statement timeline:
  - **COMPLETED:** Customers external to CAISO BAA submit 2019 NEL/NG data in MRI-S between 9/3/2020 – 9/30/2020
  - **COMPLETED:** Informational Statement will publish 10/30/2020
  - **COMPLETED:** Customer review and re-submit 2019 data (if needed) by 11/30/2020
- **COMPLETED:** Statement and Invoice published on 01/04/2021
  - Payment is due by 02/03/2021
    - Note: there are some due date exceptions per contract
- RC West Payment Calendar: <http://www.caiso.com/Documents/RCWestAnnualPaymentsCalendar.pdf>

## HANA Services

- No updates

# MSTT – effective TD 1/1/2021 is live

- Market Settlements Timeline Transformation (MSTT) initiative became effective starting with **Trade Date** January 1, 2021.
- Key changes associated with this initiative are as follows:
  - The ISO will publish Market settlement statements for **Trade Dates** beginning January 1, 2021 at T+9B, T+70B, T+11M, T+21M, and T+24M.
  - The ISO will continue to publish Market settlement statements for **Trade Dates** prior to and including December 31, 2020 at T+3B, T+12B, T+55B, T+9M, T+18M, T+33M, and T+36M.
  - While meter data for **Trade Dates** prior to January 1, 2021 must continue to be submitted by T+48B to avoid Rules of Conduct (RoC) penalties, meter data for **Trade Dates** beginning January 1, 2021 must be submitted by T+52B.
  - There is no impact to the weekly invoicing schedule.
- The below link to the 2021 payment calendar has been provided for your review. <http://www.caiso.com/Documents/CaliforniaISOPaymentsCalendar2021.xlsx>
- For further information regarding the changes associated with the Market Settlements Timeline Transformation initiative, please review the below link to the training presentation provided to market participants earlier this year. <http://www.caiso.com/Documents/Presentation-MarketSettlementsTimelineTransformationTraining.pdf>
- The procedure includes the link to the actual form-  
<http://www.caiso.com/Documents/ElectronicFundsTransferProcedure.pdf>

# PRR 1299 – Spin Non Spin No Pay Quantity

The fix went into production (PRR 1299) with the winter release 2020 (December 17, 2020).

Updated business practice manual configuration guide for pc spin non-spin no pay quantity to accommodate a specific fast start scenario not accounted for existing active configuration

Correction statement:

| Trade Date | Statement           |
|------------|---------------------|
| 12/16/2020 | T+3B Initial        |
| 12/04/2020 | T+12B Recalculation |
| 10/07/2020 | T+55B Recalculation |
| 03/30/2020 | T+9M Recalculation  |
| 06/27/2019 | T+18M Recalculation |
| 06/10/2019 | T+33M Recalculation |

# Independent Market Simulation

- Visit CAISO.com at Stay Informed>Release Planning>Independent 2020
- Upcoming meeting will be on Thursday, January 7 at 2pm.
- <http://www.caiso.com/Documents/MarketSimulationSettlementsCalendar-IndependentWinter2020Release.pdf>

| January |    |    |    |    |    |    |
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| 24      | 25 | 26 | 27 | 28 | 29 | 30 |
| 31      |    |    |    |    |    |    |

## Web Conference Information

Web address: <https://caiso.webex.com/meet/MarketSim>

## Conference Call Information ( *New Dial in numbers* )

New US Toll Dial-In number: 682-268-6591

New US Toll-Free Dial-In Number: 844-517-1271

Access Code: 962 067 710

**Hours:** Monday thru Friday 0900-1800 PDT

**ISO's 24x7 Service Desk:** (916) 351-2309 (Connectivity –UI or API)

Issues called in after hours will be worked on during the next business day

# Winter Market Simulation Settlements Updates

[Market Sim Calendar Link](#)



## Market Simulation Calendar Nov 02, 2020 through Jan 31, 2021

| Calendar Day | Day       | CMRI T+1B          | Submit Meter Data by T+3B 18:00 for Initial T+9B | Publish Initial Statement T+6B T+9B | Submit Meter Data by T+6B 18:00 for Recalc T+70B | Publish Recalc Statement T+9B T+70B | Publish Market Invoice   |
|--------------|-----------|--------------------|--|-------------------------------------|--|-------------------------------------|--|
| 06-Jan-21    | Wednesday | 5-Jan              |  |                                     |  | 22-Dec                              |  |
| 07-Jan-21    | Thursday  | 6-Jan              |  |                                     |  | Monthly Recalc 15-Dec - 22-Dec      | Daily Initial 15-Dec, 22-Dec<br>Monthly Initial 15-Dec - 22-Dec<br><br>Daily Recalc 08-Dec, 10-Dec<br>Monthly Recalc 08-Dec - 10-Dec         |
| 08-Jan-21    | Friday    | 7-Jan              | 5-Jan  |                                     |  |                                     |  |
| 09-Jan-21    | Saturday  |                    |  |                                     |  |                                     |  |
| 10-Jan-21    | Sunday    |                    |  |                                     |  |                                     |  |
| 11-Jan-21    | Monday    |                    | 6-Jan  |                                     |  |                                     | Daily Recalc 15-Dec, 22-Dec<br>Monthly Recalc 15-Dec - 22-Dec  |
| 12-Jan-21    | Tuesday   |                    | 7-Jan  |                                     |  |                                     |  |
| 13-Jan-21    | Wednesday | 12-Jan             |  | 5-Jan                               | 5-Jan  |                                     |  |
| 14-Jan-21    | Thursday  |                    |  | 6-Jan                               | 6-Jan  |                                     |  |
| 15-Jan-21    | Friday    | 14-Jan             | 12-Jan   | 7-Jan                               | 7-Jan  |                                     |  |
| 16-Jan-21    | Saturday  |                    |  |                                     |  |                                     |  |
| 17-Jan-21    | Sunday    |                    |  |                                     |  |                                     |  |
| 18-Jan-21    | Monday    | <b>ISO Holiday</b> |  |                                     |  |                                     |  |
| 19-Jan-21    | Tuesday   |                    |  | Monthly Initial 5-Jan - 7-Jan       |  | 5-Jan                               |  |
| 20-Jan-21    | Wednesday | 19-Jan             | 14-Jan   |                                     |  | 6-Jan                               | Daily Initial 05-Jan, 06-Jan, 07-Jan<br>Monthly Initial 05-Jan - 07-Jan  |
| 21-Jan-21    | Thursday  |                    |  | 12-Jan                              | 12-Jan   | 7-Jan                               |  |
| 22-Jan-21    | Friday    | 21-Jan             | 19-Jan   |                                     |  | Monthly Recalc 5-Jan - 7-Jan        |  |
| 23-Jan-21    | Saturday  |                    |  |                                     |  |                                     |  |
| 24-Jan-21    | Sunday    |                    |  |                                     |  |                                     |  |
| 25-Jan-21    | Monday    |                    |  | 14-Jan                              | 14-Jan   |                                     |  |
| 26-Jan-21    | Tuesday   |                    | 21-Jan   | Monthly Initial 12-Jan - 14-Jan     |  | 12-Jan                              |  |
| 27-Jan-21    | Wednesday |                    |  |                                     | 19-Jan   |                                     | Daily Initial 12-Jan, 14-Jan<br>Monthly Initial 12-Jan - 14-Jan<br><br>Daily Recalc 05-Jan, 06-Jan, 07-Jan<br>Monthly Recalc 05-Jan - 07-Jan |
| 28-Jan-21    | Thursday  |                    |  | 19-Jan                              |  | 14-Jan                              |  |

# Market Simulation Settlements Updates



MarketSim@caiso.com

## Day Ahead Nodal Pricing Model

- **Timeline:** October 6 –November 13 (CMRI)
- **Structured:** October 20 -October 22
- Structured Scenarios document - [http://www.caiso.com/Documents/NPM\\_structured\\_mktsim-Reviewed.pdf](http://www.caiso.com/Documents/NPM_structured_mktsim-Reviewed.pdf)

## Intertie Deviation Settlement

- **Timeline:** December 1- Jan 15, 2021 with Production date Feb 1, 2021
- **Structured:** December and December 2, 2<sup>nd</sup> attempt Jan 2021
- Please use <https://demo.caiso.tag.oati.com/> to submit tags in Map Stage environment
- Structured Scenarios document - <http://www.caiso.com/Documents/MarketSimulationScenariosIntertieDeviationSettlement.pdf>

## Symmetrical Wheeling

- **Timeline:** November 17 – Jan 15, 2021 with Production date Feb 1, 2021
- Unstructured Scenario – December 1
- <http://www.caiso.com/Documents/MarketSimulationScenariosSymmetricalSettlementForWheelingThroughEimBAAs.pdf>

## EIM Enhancements 2020

- **Timeline** December 15- December 29 (CMRI)
- Unstructured Scenarios document <http://caiso.com/documents/marketsimulationscenariosenergyimbalancemarket2020enhancements.pdf>

# ISO Computer Based Training Programs

Visit [caiso.com](http://www.caiso.com) **Learning Center** web page to access our training calendar, register for courses and find other informational resources: <http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>

| Computer Based Training – Settlements   |   |
|---|---|
| There are more than <a href="#">30</a> computer based training modules on the ISO website covering: |   |
| RC Customer Settlements   | <a href="http://www.caiso.com/CBT/RC-Settlements/index.html">http://www.caiso.com/CBT/RC-Settlements/index.html</a>   |
| Energy Settlements Validation Practice  | <a href="http://www.caiso.com/CBT/EnergySettlementsValidation/story.html">http://www.caiso.com/CBT/EnergySettlementsValidation/story.html</a>   |
| Settlement Validation Practice  | <a href="http://www.caiso.com/CBT/Settlements%20Validation%20Practice/story_html5.html">http://www.caiso.com/CBT/Settlements%20Validation%20Practice/story_html5.html</a>   |
| Commitment Costs  | <a href="http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html">http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html</a>   |
| Settlements foundational concepts (EIM)   | <a href="https://www.westerneim.com/CBT/Settlements%20Foundational%20Concepts/Settlements-FoundationalConcepts.html">https://www.westerneim.com/CBT/Settlements%20Foundational%20Concepts/Settlements-FoundationalConcepts.html</a> |
| Metering Overview   | <a href="http://www.caiso.com/CBT/MeteringOverview/MeteringOverview.html">http://www.caiso.com/CBT/MeteringOverview/MeteringOverview.html</a>   |
| Settlements Process   | <a href="http://www.caiso.com/CBT/SettlementsProcess/story_html5.html">http://www.caiso.com/CBT/SettlementsProcess/story_html5.html</a>   |
| Market Pricing  | <a href="http://www.caiso.com/CBT/Market-Pricing/story.html">http://www.caiso.com/CBT/Market-Pricing/story.html</a>   |
| New initiatives training course on the learning center web page and retooling Settlements trainings |   |

| Webinars  |                                 |
|---|---------------------------------|
| <b>Welcome to the ISO (Webinar)</b>             | January 14, 2021                |
| <b>Intro to ISO Workshop (Virtual workshop)</b> | March 2-3, 2021<br>(9am-12pm)   |
| <b>Market Transactions (Virtual workshop)</b>   | March 9-10, 2021<br>(9am-12pm)  |
| <b>ISO Settlements (Virtual workshop)</b>       | March 16-17, 2021<br>(9am-12pm) |



# Recent Tweets

- 
**@ISOSettlements** @isosettlements · 19h  
 The Market simulation conference call has posted the presentations from the 12/14 and 12/17 meetings. [bit.ly/3hXrPVU](https://bit.ly/3hXrPVU)
- 
**@ISOSettlements** @isosettlements · Dec 21  
 The @California\_ISO will publish Market Settlement statements for trade dates by 12/31/20 at T+3B, T+12B, T+55B, T+9M, T+18M, T+33M, and T+36M. [bit.ly/2LFRnMu](https://bit.ly/2LFRnMu)
- 
**@ISOSettlements** @isosettlements · Dec 21  
 The @California\_ISO will publish Market Settlement statements for trade dates beginning 1/1/21 for T+9B, T+70B, T+11M, T+21M, and T+24M. [bit.ly/2LFRnMu](https://bit.ly/2LFRnMu)
- 
**@ISOSettlements** @isosettlements · 15m  
 The Market simulation conference call has posted the presentations from the 12/21/20 and 12/24/20 meetings. [bit.ly/3hXrPVU](https://bit.ly/3hXrPVU)
- 
**@ISOSettlements** @isosettlements · 1h  
 RC Service statement and invoices for RC initial 1/1/21-1/31/21 and RC recalculation 1/1/20-1/31/20 can be retrieved in Market Results Interface-Settlements (MRI-S). Payments due no later than 10 a.m. (Pacific Time) on 2/3/2021. [bit.ly/2ZJFeKW](https://bit.ly/2ZJFeKW)



**@ISOSettlements** @isosettlements · Dec 30, 2020  
 @California\_ISO Settlement User Group looks forward to engaging with market participants, RC West entities, and all vendors in the new year. See the 2021 meeting schedule; note the conference call on 1/6/21 at 10 a.m. [buff.ly/36ctbGV](https://buff.ly/36ctbGV)

2021  
Market Services  
Settlement User Group Meetings  
Note: dates subject to change; for the latest information please visit the Calendar on www.caiso.com



| January |    |    |    |    |    |    | February |    |    |    |    |    |    | March |    |    |    |    |    |    | April |    |    |    |    |    |    |    |    |    |    |
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| May |    |    |    |    |    |    | June |    |    |    |    |    |    | July |    |    |    |    |    |    | August |    |    |    |    |    |    |    |    |    |    |
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| September |    |    |    |    |    |    | October |    |    |    |    |    |    | November |    |    |    |    |    |    | December |    |    |    |    |    |    |    |    |    |    |
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# Next SUG : January 20, 2021

at 10:00 A.M



# Settlement References

- Settlement User Group Calendar 2021
- Knowledge Articles
- ISO Settlements Twitter Page
- Ways to Participate in Settlements

# Settlement User Group Calendar 2021

Market Services

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on [www.caiso.com](http://www.caiso.com) and follow us on Twitter @ISOSettlements



## California ISO

| January |    |    |    |    |    |    |
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| March |    |    |    |    |    |    |
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| April |    |    |    |    |    |    |
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| May |    |    |    |    |    |    |
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| June |    |    |    |    |    |    |
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| August |    |    |    |    |    |    |
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| September |    |    |    |    |    |    |
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| October |    |    |    |    |    |    |
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| November |    |    |    |    |    |    |
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| December |    |    |    |    |    |    |
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| 19       | 20 | 21 | 22 | 23 | 24 | 25 |
| 26       | 27 | 28 | 29 | 30 | 31 |    |

Meeting
  Agenda posted
  Holiday

# Knowledge Articles

CAISO has posted **Knowledge Articles** for FAQs in CIDI.

To access the articles in CIDI, you either:

**Option 1:** Type in the keyword “**Identify**” in the search field to pull up the article, or

**Option 2:** Click on the **Knowledge Articles** tab, and then click the **Settlements and Metering** category link to pull up a list of the Settlements related articles.

## Posted Knowledge Articles to date:

- RC rate location
- RC Informational Statement
- RC services charge
- 2019 prorated RC charge
- Payment calendar
- ED-DPMIN
- After-the-Fact EIM Manual Dispatches from ISO systems
- Validate Mitigated prices in DA, RTPD (FMM) and RTD *-New*
- Calculation of meter data for TG resources *-New*
- Pricing node (Pnode) price used for CRR Settlement *-New*

California ISO Help Center Knowledge articles Cases Submit a

Search

Identifying

Search Results

All Knowledge Cases Collapse List

Knowledge  
5+ Results - Sorted by Relevance View More

Identifying after-the-fact EIM manual dispatches from ISO systems  
000001275 - Last Modified Oct 14, 2019 4:23 PM  
An EIM organization can identify a manual dispatch after the fact using ADS, the ED and CMRI...How can an Energy Imbalance Market (EIM) organization identify, after-the-fact, whether there

# ISO Settlements Twitter

- Settlement related updates
- Market sim updates
- Note: Will not replace any existing media communications
- Please take the opportunity to follow [@ISOSettlements on Twitter](https://twitter.com/ISOSettlements) by downloading the Twitter application to **any mobile device**
- Twitter feed can be accessed on **any web browser**
- **No account required** to view the Twitter feed and posts
- Save twitter page as a Favorite on your tab



# Ways to participate in settlements

- ISO Settlements Twitter Page
  - <https://twitter.com/isosettlements>
- Visit the Settlements page
  - <http://www.caiso.com/market/Pages/Settlements/Default.aspx>
- Attend web conference meetings
  - Settlement User Group (SUG) bi-weekly meetings
    - Release User Group
    - Market Sim Conference Calls
    - Initiative status with settlement updates
    - <http://www.caiso.com/StakeholderProcesses/>
    - [System change with settlement updates on independent releases](#)
- BPM PRR Change Management monthly web meeting
  - Settlement and Billing BPM status updates
  - <http://bpmcm.caiso.com/Pages/default.aspx>
  - <http://www.caiso.com/rules/Pages/BusinessPracticeManuals/Default.aspx>
  - <http://www.caiso.com/Documents/ISO-AcronymList.pdf>

# Settlement User Group

Thank you for participating in our call

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Follow us on Twitter  @ISO Settlements