



California ISO

# Settlement User Group

May 8, 2024

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.</p>	<p>US Toll Free: 1-844-621-3956</p> <p>US Toll : 1- 650-479-3208</p> <p>Access Code: 961 854 046</p>
<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 version.</p> <p>The recording will be posted on our website and be available for a short period of time until May 22<sup>nd</sup>, 2024. Please mute your phone while the discussion is going on in order to eliminate background noise, to unmute press and hold the spacebar to temporarily unmute, double mute. Calls are structured to stimulate an honest dialogue and engage different perspectives.</p> <p>To ask a question after each topic, unmute yourself before asking your question, or enter question on the chat</p> <p style="text-align: center;">please state your name and affiliation. Thank you.</p>	



[mute](#)

# Settlement User Group Agenda

Wednesday, May 8, 2024

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

Time	Topic	Presenter
▪ 10:00 – 10:02	▪ Welcome and Introduction	▪ Massih Ahmadi
▪ 10:02 – 11:00	▪ Settlements <ul style="list-style-type: none"><li>▪ Summer 2024 Release</li><li>▪ Market Sim Calendar</li><li>▪ PRR/BPM</li><li>▪ Update to CC 8077 DAME and EDAM Tier 1</li><li>▪ Training</li></ul>	▪ Massih Ahmadi ▪ Assad Al-Baijat ▪ Massih Ahmadi ▪ Massih Ahmadi ▪ Dorothy Vance

# 2024 Summer & Independent Releases

## Summer 2024 Release:

- TSMSP2
  - A/S SOC retro
  - WEIM Pump Storage
- Assistance Energy Transfer
- Change to RT Congestion PC
  - Split Acquired Rights
    - Hybrid TG
  - RT Energy PC

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## Independent 2024 Release:

- TEA
- Advisory Shutdown Flag
- GMC CC4575

# 2024 Summer Settlements Release

- Release Scope:
  - 1<sup>st</sup> draft tech docs targeting: **2/12**, *TEA and TS MSP published already* → **Completed**
  - 1<sup>st</sup> draft config output file + release component summary posted: **3/4** → **Completed**
  - 2nd draft config output file + updated release component summary targeting: **3/27** → **Completed**
- Settlements Market Sim start:
  - **TSMSP2**: Start Date **4/30** with Start TD **4/30** – End Date **5/17** – Structured Simulation TD **5/07**, **5/09**
  - **TEA**: Start Date **6/17** with Start TD **6/17** – End Date **7/05**
  - **A/S SOC**: Start Date **4/16**
- Pre-prod configuration output file + release artifacts target: **5/22**
- Anticipated prod deployment: **5/29**
- Prospective activation: **6/1**

# Market Simulation Summer 2024 Calendar (MAP STAGE)



## Market Simulation Summer 2024 Calendar (MAP STAGE) April 15, 2024 through May 10, 2024

Calendar Day	Day	CMRI T+1B	Submit Meter Data by T+2B 10:00 for Initial T+9B	Publish Initial Statement T+5B T+9B	Submit Meter Data by T+5B 18:00 for Recalc T+70B	Publish Recalc Statement T+8B T+70B	Publish Market Invoice
15-Apr-24	Monday						
16-Apr-24	Tuesday						
17-Apr-24	Wednesday	16-Apr					
18-Apr-24	Thursday		16-Apr				
19-Apr-24	Friday	18-Apr					
20-Apr-24	Saturday						
21-Apr-24	Sunday						
22-Apr-24	Monday		18-Apr				
23-Apr-24	Tuesday			16-Apr	16-Apr		
24-Apr-24	Wednesday	23-Apr					
25-Apr-24	Thursday		23-Apr	18-Apr	18-Apr		
26-Apr-24	Friday	25-Apr		Monthly Initial 16-Apr - 18-Apr		16-Apr	Daily Initial 16-Apr; Daily Initial 18-Apr ; Monthly Initial 16-Apr - 18-Apr;
27-Apr-24	Saturday						
28-Apr-24	Sunday						
29-Apr-24	Monday		25-Apr				
30-Apr-24	Tuesday			23-Apr	23-Apr	18-Apr	
01-May-24	Wednesday	30-Apr				Monthly Recalc 16-Apr - 18-Apr	Daily Recalc 16-Apr; Daily Recalc 18-Apr ; Monthly Recalc 16-Apr - 18-Apr;
02-May-24	Thursday		30-Apr	25-Apr	25-Apr		
03-May-24	Friday	2-May				23-Apr	
04-May-24	Saturday						
05-May-24	Sunday						
06-May-24	Monday		2-May				
07-May-24	Tuesday			30-Apr	30-Apr	25-Apr	
08-May-24	Wednesday	7-May		Monthly Initial 23-Apr - 30-Apr			Daily Initial 23-Apr; Daily Initial 25-Apr ; Daily Initial 30-Apr ; Monthly Initial 23-Apr - 30-Apr;
09-May-24	Thursday		7-May	2-May	2-May		
10-May-24	Friday	9-May				30-Apr	
11-May-24	Saturday						
12-May-24	Sunday						
13-May-24	Monday		9-May			Monthly Recalc 23-Apr - 30-Apr	Daily Recalc 23-Apr; Daily Recalc 25-Apr ; Daily Recalc 30-Apr ; Monthly Recalc 23-Apr - 30-Apr;
14-May-24	Tuesday			7-May	7-May	2-May	
15-May-24	Wednesday						
16-May-24	Thursday			9-May	9-May		
17-May-24	Friday			Monthly Initial 02-May - 09-May		7-May	Daily Initial 2-May; Daily Initial 7-May ; Daily Initial 9-May Monthly Initial 2-May - 9-May;
18-May-24	Saturday						
19-May-24	Sunday						
20-May-24	Monday						
21-May-24	Tuesday					9-May	
22-May-24	Wednesday					Monthly Recalc 02-May - 09-May	Daily Recalc 2-May; Daily Recalc 7-May ; Daily Recalc 9-May Monthly Recalc 2-May - 9-May;
23-May-24	Thursday						
24-May-24	Friday						

# PRR/BPM for Summer & Independent Releases

- BPM/PRR:
  - 8 PRRs - **Posted on 3/25**
    - Scheduled to be discussed in **4/23 & 5/21** BPM calls
    - External notification was sent on 3/25
  - 2 New PRRs - **Posted on 4/30**
    - Scheduled to be discussed in **5/21 & 6/25** BPM calls
    - External notification was sent on 4/30

# PRR/BPM for Summer & Independent Releases

- We've posted 8 PRRs below for Summer and Independent Releases:
  - **PRR 1559 for TEA:** *\*moved to Independent Release\**
    - BPM - CG PC ETC TOR CVR Quantity\_5.9.0a
  - **PRR 1560 for TSMSP:**
    - BPM - PC\_Wheel\_Export\_Quantity\_5.6
  - **PRR 1561 for AS SOC Retro:**
    - BPM - PC RTM Net Amount 5.37.1
    - BPM - PC RTM Net Amount 5.38.1
  - **PRR 1562 for WEIM Pump Storage:**
    - BPM - PC Real Time Energy Quantity
  - **PRR 1563 for AET:**
    - BPM - CC 6476 Real Time Assistance Energy Transfer Surcharge 5.1
    - BPM - CC 6479 Real Time Assistance Energy Transfer Allocation 5.1

# PRR/BPM for Summer & Independent Releases

- **PRR 1564 for RT Congestion:**
  - BPM - PC Real Time Congestion 5.8
  
- **PRR 1565 for Split Acquired Rights:**
  - BPM - CG PC RA Availability Incentive Mechanism\_5.11
  
- **PRR 1566 for Hybrid TG:**
  - BPM - CG CC 6475 Real Time Uninstructed Imbalance Energy Settlement\_5.7
  - BPM - CG CC 6636 IFM Bid Cost Recovery Tier1 Allocation\_5.5
  - BPM - CG CC 7077 Daily Flexible Ramp Up Uncertainty Award Allocation\_5.5
  - BPM - CG PC Spin Non-Spin No Pay Quantity\_5.24
  - BPM - CG PC Ancillary Services\_5.12
  - BPM - CG CC 7087 Daily Flexible Ramp Down Uncertainty Award Allocation\_5.5
  
- **PRR 1571 for Advisory Shutdown:** *\*New PRR: Independent Release\**
  - BPM - PC Start-Up and Minimum Load Cost\_5.22.0a
  
- **PRR 1572 for GMC CC4575:** *\*New PRR: Independent Release\**
  - BPM - CG CC 4575 GMC Scheduling Coordinator ID Charge\_5.0g
  
- Please review “Announcements” section of PRRs for more detail. Here is link to [BPM Library](#).



# DAME and EDAM Tech Docs

- Update to CC 8077 Tier 1:
  - Updated formula and replaced tech doc
- Location of Tier 1 Draft Tech Docs:
  - ***Release Planning > 2025 releases > Fall 2025 > Fall 2025 settlements release DAME and EDAM tier 1 technical document***
- External notification was sent out to the Settlements User Group on 05/06/24 at 3:22pm PST
- Draft Tech Docs:
  - **Tier 1 = Completed: 39 Tech Docs - Posted on 01/16/24**
  - **Tier 2 = Completed: 32 Tech Docs - Posted on 03/26/24**
  - **Tier 3 = Tech Docs – approximately by 08/26/24**



# ISO Training Schedule

Training Course	Date and time
<p>Customer Education Resource Operations Readiness Training Series:</p> <ul style="list-style-type: none"><li>Session 1: Resource Performance Expectations</li><li>Session 2: Battery Performance Expectations</li><li>Session 3: Managing Intertie Transactions</li><li>Session 4: WEIM Resource Performance Expectations</li></ul>	<p>May 7, 2024 9:00 am -12:00 pm May 15, 2024 10:00 am -12:00 pm May 16, 2024 9:00 am -11:00 am May 22, 2024 9:00 am -11:00 am</p>
<p>Session 1: New CAISO Website Overview Webinar Training</p> <p>Session 2: New CAISO Website Overview Webinar Training</p>	<p>May 23, 2024 9:00 am -10:00 pm</p> <p>May 29, 2024 10:00 am -11:00 pm</p>

**New!** Use our [Pre-Training Release Survey](#) to submit topics that you would like to see covered in the upcoming training.

Are you looking for more training?

The ISO Learning Center has computer based training available for lots of topics. Check out the Learning Center: <http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>



# ISO Training Schedule

Training Course	Date and time
<b>Pre-Market Simulation Webinar Training Import Allocation Automation</b>	<b>May 2, 2024 9:00am-10:00am</b>
<b>Customer Education Resource Operations Readiness Training Series:</b> <b>Session 1: Resource Performance Expectations</b> <b>Session 2: Battery Performance Expectations</b> <b>Session 3: Managing Intertie Transactions</b> <b>Session 4: WEIM Resource Performance Expectations</b>	<b>May 7, 2024 9:00 am -12:00 pm</b> <b>May 15, 2024 10:00 am -12:00 pm</b> <b>May 16, 2024 9:00 am -11:00 am</b> <b>May 22, 2024 9:00 am -11:00 am</b>

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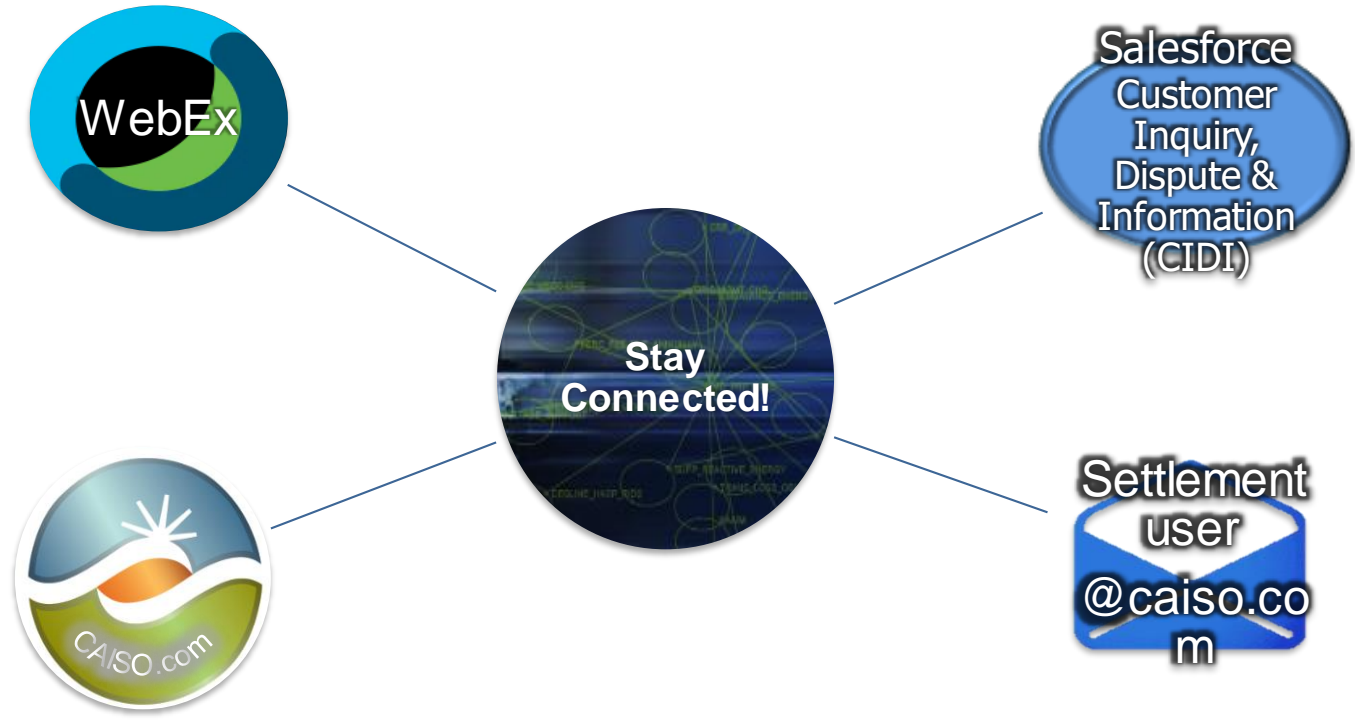
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# Next SUG Meeting: May 22<sup>nd</sup>, 2024 at 10:00 A.M

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# Settlement User Group Calendar 2024

January						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

February						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

July						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			


August						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31


September						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

 Meeting

 Holiday

# Settlement User Group

Thank you for participating in our call

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