



California ISO

# Settlement User Group

Aug 18, 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.</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 version.

The recording will be posted on our website and be available for a short period of time until Sep 6, 2021. 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.

To ask a question after each topic, unmute yourself before asking your question, or enter question on the  Chat

please state your name and affiliation. Thank you.



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# Settlement User Group Agenda

Wednesday, Aug 18, 2021

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>▪ Unplanned/Emergency Settlement Release Update</li><li>▪ Fall/Q3 2021 Settlement Release</li><li>▪ PRR Overview- Fall 2021</li><li>▪ Market Simulation Fall 2021 Updates</li><li>▪ Market Simulation Settlement Calendar</li><li>▪ Customer Readiness 2021 Training</li><li>▪ UFE election process for RT Settlement P2</li></ul>	▪ Elizabeth Caldwell ▪ Elizabeth Caldwell ▪ Brenda Corona ▪ Trang Vo ▪ Bonnie Peacock ▪ Cynthia Hinman ▪ Uma Ramanathan

# Unplanned/Emergency Settlement Release Update

- Resolves a design gap from Intertie Deviation Settlement project
- Directly impacts CC 6456
- Issue: calculating a deviation and charging penalty (CISO BAA only) in cases of HASP market disruption
- Solution: New disruption flag BD + formula update to exempt hours where HASP market disruption occurs (flag = 1)
  
- Implementation Plan
  - Functional testing + UAT completed successfully
  - Draft config output file + PRR 1366 with BPM changes posted: **8/9**
  - Communication sent 8/16 =>
    - On track for 8/18 prod deployment
    - Reference 8/9 draft config output file as the pre-prod version

# Fall/Q3 2021 Settlement Release

- Release scope:
  - Projects with Settlement Configuration Changes:
    - ESDER Phase 4
    - Real Time Settlement Review Phase 2
    - Intertie Shadow Pricing Resolution
  - Non-project: outlined/updated in release component summary
- 1<sup>st</sup> draft tech docs posted: **5/28**
- 1<sup>st</sup> draft config output file + release component summary posted: **6/14**
- 2<sup>nd</sup> draft config output file + updated release component summary posted: **7/21**
- 3<sup>rd</sup> draft config output file + updated release component summary to post: **8/25**
- Market sim targeting: **8/30 – 10/1**
  - Please watch for PMO communications on specifics
  - Mkt Sim kick off target => 8/26
  - Participate in RUG - every other Tuesday meeting: next is 8/24
- Pre-prod configuration output file + release artifacts to post: **10/20**
- Anticipated prod deployment: **10/27**

# PRR and BPM Updates

To view all details for the PRRs in the [BPM Change Management application](#)

PRR	Title	BPM	Status
1366	Configuration change to charge code 6456 Intertie Deviation Settlement introducing a new flag exempting hours in which HASP market disruption occurs.	BPM - CG CC Intertie Deviation Settlement v5.3	PRR 1366 has been made available at this time to allow additional time to review and submit comments. Comment period will <b>close 9/15/2021</b> .  PRR will be discussed during the September and October BPM meetings.

- Planning to submit 9 PRRs for Fall 2021
- Market Notice of PRRs will be announced: **8/31**
- Initial Comment Period: **8/31 – 9/15** at 11:59PM
- BPM Monthly meeting to discuss PRRs: **9/28** at 11 AM

[Business Practice Manual Proposed Revision Request Tracking Log](#)

# Fall/Q3 2021 - Settlement Release – PRRs Forthcoming

Project	Charge Codes
<p>Intertie shadow pricing resolution</p> <p>Effective Date: 11/1/2021</p>	<p>6710 Day Ahead Congestion - AS Spinning Reserve Import Settlement v5.4            6715 Real Time Congestion - AS Spinning Reserve Import Settlement v5.3            6720 Day Ahead Congestion - AS Non-Spinning Reserve Import Settlement v5.4            6725 Real Time Congestion - AS Non-Spinning Reserve Import Settlement v5.3            6750 Day Ahead Congestion - AS Regulation Up Import Settlement v5.3            6755 Real Time Congestion - AS Regulation Up Import Settlement v5.3            6760 Day Ahead Congestion - AS Regulation Down Import Settlement v5.4            6765 Real Time Congestion - AS Regulation Down Import Settlement v5.3</p>
<p>Real-time settlement review phase 2</p> <p>Effective date: 11/1/2021</p>	<p>Real Time Congestion v5.7            64740 Real-Time Unaccounted for EIM Energy Settlement v5.3            6985 Real Time Marginal Losses Offset v5.7</p>
<p>Energy storage and distribution energy resources phase 4</p> <p>Effective date: 11/1/2021</p>	<p>RTM Net Amount v5.36</p>
<p>Short long start definition initiative</p> <p>Effective date: 11/1/2021</p>	<p>RA Availability Incentive Mechanism 5.10.0a            PC Start-Up and Minimum Load Cost v5.18</p>

# Market Simulation Fall 2021 Updates

- [Market Simulation Plan - Fall 2021 Release](#)
- [Market Simulation Settlements Calendar - Fall 2021 Release](#)
- Market Simulation upcoming meetings for Fall 2021 Release

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

Meeting number: 962 067 710

- Dial-in Number: 844-517-1271 (Toll Free)
- International Dial-in: 682-268-6591
- Access Code: 962 067 710

# Market Simulation Fall 2021 Updates (con't)

Project	Supporting Documents
<p>ESDER Phase 4</p> <p>Effective date: 11/1/2021</p>	<ul style="list-style-type: none"> <li>• <a href="#">Market Simulation Structured Scenarios - Energy Storage and Distributed Energy Resources Phase 4</a></li> <li>• <a href="#">Business Requirements Specification v1.1 - Energy Storage and Distributed Energy Resources Phase 4</a></li> </ul>
<p>Real Time Settlement Review Phase 2</p> <p>Effective Date: 11/1/2021</p>	<ul style="list-style-type: none"> <li>• <a href="#">Market Simulation Structured Scenarios - Real-Time Settlement Review</a></li> <li>• <a href="#">Business Requirements Specification v1.0 - Real-Time Settlement Review</a></li> </ul>
<p>Intertie Shadow Pricing</p>	<ul style="list-style-type: none"> <li>• <a href="#">Business Requirements Specification v1.0 - Intertie Shadow Pricing Resolution</a></li> </ul>
<p>Short and Long Start Definition</p> <p>Effective Date: 11/1/2021</p>	<ul style="list-style-type: none"> <li>• <a href="#">Business Requirements Specification v1.0 - Short-long Start Definitions</a></li> </ul>

# Market Simulation Calendar



## Market Simulation Calendar (MAP STAGE) Aug 30, 2021 through Oct 01, 2021

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
30-Aug-21	Monday						
31-Aug-21	Tuesday						
01-Sep-21	Wednesday	31-Aug					
02-Sep-21	Thursday		31-Aug				
03-Sep-21	Friday	2-Sep					
04-Sep-21	Saturday						
05-Sep-21	Sunday						
06-Sep-21	Monday						
07-Sep-21	Tuesday						
08-Sep-21	Wednesday	7-Sep	2-Sep	31-Aug	31-Aug		
09-Sep-21	Thursday		7-Sep	Monthly Initial 31-Aug			Daily Initial 31-Aug Monthly Initial 31-Aug
10-Sep-21	Friday	9-Sep		2-Sep	2-Sep		
11-Sep-21	Saturday						
12-Sep-21	Sunday						
13-Sep-21	Monday		9-Sep			31-Aug	
14-Sep-21	Tuesday			7-Sep	7-Sep	Monthly Recalc 31-Aug	Daily Recalc 31-Aug Monthly Recalc 31-Aug
15-Sep-21	Wednesday	14-Sep				2-Sep	
16-Sep-21	Thursday		14-Sep	9-Sep	9-Sep		
17-Sep-21	Friday			Monthly Initial 2-Sep - 9-Sep			Daily Initial 2-Sep; 7-Sep; 9-Sep Monthly Initial 2-Sep - 9-Sep
18-Sep-21	Saturday	16-Sep				7-Sep	
19-Sep-21	Sunday						
20-Sep-21	Monday		16-Sep				
21-Sep-21	Tuesday			14-Sep	14-Sep	9-Sep	
22-Sep-21	Wednesday					Monthly Recalc 2-Sep - 9-Sep	Daily Recalc 2-Sep; 7-Sep; 9-Sep Monthly Recalc 2-Sep - 9-Sep
23-Sep-21	Thursday	21-Sep		16-Sep	16-Sep		
24-Sep-21	Friday			Monthly Initial 14-Sep - 16-Sep			Daily Initial 14-Sep; 16-Sep Monthly Initial 14-Sep - 16-Sep
25-Sep-21	Saturday	23-Sep				14-Sep	
26-Sep-21	Sunday						
27-Sep-21	Monday		23-Sep				
28-Sep-21	Tuesday			21-Sep	21-Sep	16-Sep	
29-Sep-21	Wednesday					Monthly Recalc 14-Sep - 16-Sep	Daily Recalc 14-Sep; 16-Sep Monthly Recalc 14-Sep - 16-Sep
30-Sep-21	Thursday	28-Sep					

# Market Simulation Calendar (con't)



## Market Simulation Calendar (MAP STAGE) Aug 30, 2021 through Oct 01, 2021

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30-Sep-21	Thursday		28-Sep	23-Sep	23-Sep		
01-Oct-21	Friday	30-Sep		Monthly Initial 21-Sep - 23-Sep		21-Sep	Daily Initial 21-Sep; 23-Sep Monthly Initial 21-Sep - 23-Sep
02-Oct-21	Saturday						
03-Oct-21	Sunday						
04-Oct-21	Monday		30-Sep				
05-Oct-21	Tuesday			28-Sep	28-Sep	23-Sep	
06-Oct-21	Wednesday					Monthly Recalc 21-Sep - 23-Sep	Daily Recalc 21-Sep; 23-Sep Monthly Recalc 21-Sep - 23-Sep
07-Oct-21	Thursday			30-Sep	30-Sep		
08-Oct-21	Friday			Monthly Initial 28-Sep - 30-Sep		28-Sep	Daily Initial 28-Sep; 30-Sep Monthly Initial 28-Sep - 30-Sep
09-Oct-21	Saturday						
10-Oct-21	Sunday						
11-Oct-21	Monday						
12-Oct-21	Tuesday					30-Sep	
13-Oct-21	Wednesday					Monthly Recalc 28-Sep - 30-Sep	Daily Recalc 28-Sep; 30-Sep Monthly Recalc 28-Sep - 30-Sep
14-Oct-21	Thursday						
15-Oct-21	Friday						
16-Oct-21	Saturday						
17-Oct-21	Sunday						

# ISO Instructor-Led Training Sessions

Visit the [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>

Training Courses and workshops	Date and time
<b>Real-time Settlements Review – Phase 2 (Tentative)</b>	August 25, 2021 (9am – 10am)
<b>Short-Long Start Definitions Training (Tentative)</b>	August 26, 2021 (1pm-2:30pm)
<b>Hybrid Resources – Phase 2a (Tentative)</b>	August 30, 2021 (10:30am-12:00pm)
<b>Energy Storage and Distributed Energy Resources – Phase 4 (Tentative)</b>	August 31, 2021 (9:30am-11:00am)
<b>Variable Operations and Maintenance Cost Review (Tentative)</b>	October 14, 2021 (11am – noon)

*All Summer Readiness related webinar recordings are available on [www.caiso.com](http://www.caiso.com) in the Learning Center and on the Summer Readiness release page.*

# ISO Computer Based Training Programs

Visit 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 [30](#) computer based training modules on the ISO website covering:

RC Settlements	<a href="http://www.caiso.com/CBT/RC-Settlements/rc-settlements.html#/">http://www.caiso.com/CBT/RC-Settlements/rc-settlements.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>
Day-Ahead Settlements	<a href="http://www.caiso.com/CBT/Day-Ahead-Settlements/Day-Ahead-Settlements.html">http://www.caiso.com/CBT/Day-Ahead-Settlements/Day-Ahead-Settlements.html</a>

New initiatives training course on the learning center web page and retooling Settlements trainings



California ISO

# UFE election process for RT Settlement P2

Uma Ramanathan

# Real-Time Unaccounted For Energy (UFE) Changes

**Question)** What is the background for this initiative?

**Response)** This initiative was request by the EIM BAA's to consider allowing them to elect whether or not to settle UFE at the EIM Quarterly meeting. Based on the EIM request, the ISO investigated and proposed the following solutions. Please review the Draft Final Proposal in the below link.

<https://stakeholdercenter.caiso.com/StakeholderInitiatives/Real-time-settlement-review>

**Question)** What changes to expect in Settlements configurations if an EIM participant chooses not to have ISO settle UFE?

**Response)** Please review the Draft Technical document posted for fall under Release Planning section of the CAISO website.

<http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx>

# Real-Time Unaccounted For Energy (UFE) Changes

**Question)** What other charge codes are impacted besides UFE?

**Response)** The other impacted CCS are:

Real-Time Imbalance Energy Offset (CC64770), Real-Time Congestion Allocation Offset (CC67740), Real-Time Marginal Loss Obligation (CC69850).

# Real-Time Unaccounted For Energy (UFE) Changes

**Question:** What is the ISO's due date for EIM participants to make their elections, and what is the process?

**Response:**

Market Sim: Market Sim team will communicate the election date through MSIM meetings.

Annual Election for 2021: CAISO need to receive the UFE Election letter by 9/30/2021.

Annual Election for 2022: CAISO need to receive the UFE Election letter by 10/31/2021.

# Real-Time Unaccounted For Energy (UFE) Changes

**Annual Election process:** The annual elections span from Trade Dates January 1<sup>st</sup> through Dec 31<sup>st</sup>. Per EIM BPM, EIM entities shall provide their annual UFE Election letter by Oct 31 for the following calendar year.

## **UFE Election Due Dates:**

**Market Sim:** Market Sim team will communicate the election due date through MSIM meetings.

**Annual Election for 2021:** UFE Election letter due by 9/30/2021. This covers Trade Dates from 11/1/2021 through 12/31/2021.

**Annual Election for 2022:** UFE Election letter due by 10/31/2021. This covers Trade Dates from 1/1/2022 through 12/31/2022.

# Real-Time Unaccounted For Energy (UFE) Changes

UFE Election process steps:

- 1) EIM Entity submits an Inquiry Ticket in CIDI and attaches the completed Annual UFE Election letters.
  - Annual UFE Election letter for 2021 (slide 21)
  - Annual UFE Election letter for 2022 (slide 22)
  
- 2) CIDI ticket is received and routed by Customer Services to Regulatory Contracts. [Incoming CIDI tickets will go directly to Regulatory Contracts based on key words from the CIDI ticket **Subject** field.]
  
- 3) Regulatory Contracts reviews and processes the UFE elections, then routes the CIDI ticket to the Masterfile Team.

# Real-Time Unaccounted For Energy (UFE) Changes

UFE Election process steps (continued):

- 4) The Masterfile Team sets the election flag and loss percentage, then routes the CIDI ticket to the Market Settlement Design configuration (MSDC) team.
- 5) MSDC verifies the information, then routes the ticket to Customer Services for closure.

# Real-Time Unaccounted For Energy (UFE) Changes

Draft Tariff Section 29.11 (c) (2) (B) is as follows:

Election Not to Settle Unaccounted for Energy. Annually, an EIM Entity Scheduling Coordinator that submits metered Demand through Meter Data calculated without End-Use Meters may elect to not settle Unaccounted For Energy through the CAISO Markets, in which case –

- (i) the CAISO will apply a zero-percent Transmission Losses factor when calculating the Initial EIM base load schedule per section 29.34(g); and
- (ii) the EIM Entity Scheduling Coordinator will apply a zero-percent Transmission Losses factor when calculating their metered Demand.

CAISO will also add the Annual UFE Election process to EIM BPM as well.

# Real-Time Unaccounted For Energy (UFE) Changes

## **Annual UFE Election Letter for 2021: Due by 9/30/2021**

- EIM Entity Name and Address.
- Subject: UFE Elections - 2021
- Pursuant to CAISO Tariff Section 29.11(c) (2) (B), [insert EIM Entity Name] makes the following UFE Elections for Trade Dates 11/1/2021 - 12/31/2021.
- UFE Settlement Election: Yes (settle) or No (do not settle).
- Loss Factor:
  - If UFE Settlement Election is Yes, please provide the OATT Loss factor or agreed upon loss factor percentage.
  - If UFE Settlement Election is No, enter 0%.
- Please contact [insert contact name and info] with any questions.

# Real-Time Unaccounted For Energy (UFE) Changes

## **Annual UFE Election Letter for 2022: Due by 10/31/2021**

- EIM Entity Name and Address.
- Subject: UFE Elections - 2022
- Pursuant to CAISO Tariff Section 29.11(c) (2) (B), [insert EIM Entity Name] makes the following UFE Elections for Trade Dates 1/1/2022 – 12/31/2022.
- UFE Settlement Election: Yes (settle) or No (do not settle).
- Loss Factor:
  - If UFE Settlement Election is Yes, please provide the OATT Loss factor or agreed upon loss factor percentage.
  - If UFE Settlement Election is No, enter 0%.
- Please contact [insert contact name and info] with any questions.

## Real-Time Unaccounted For Energy (UFE) Changes

**Question)** If EIM entity misses submitting the UFE Election letter by deadline, what will be the impact?

**Response)** The default elections will be used; the entity will be subject to UFE Settlement.

**Question)** If the EIM entity selects the “not to settle UFE” option for Market Sim and if they want to change it to “yes settle”, can we change it?

**Response)** Yes, you can make election changes once between Market Sim and Go-live effective Trade Date (11/1/2021).

# Real-Time Unaccounted For Energy (UFE) Changes

**Question)** How do I submit my UFE Election Letter in Production?

**Response)** Please submit the UFE Election Letter as an attachment via CIDI. The letter should be on company letterhead and is required with a signature from the company management.

**The deadline is 9/30/2021 for election year 2021 and 10/31/2021 for election year 2022.**

# Questions?

# Settlement Corner

Upcoming Topics	Previous Topics	Published Knowledge Articles
<ul style="list-style-type: none"><li>Fall 2021 Settlement Release Projects</li></ul>	<ul style="list-style-type: none"><li>Storage- <a href="#">Link</a></li><li>Bid Cost Recovery - <a href="#">Link</a></li><li>FERC 841- requested adjustments – <a href="#">Link</a></li><li>Renewable and energy storage - <a href="#">Link</a></li><li>Fall Release Projects – <a href="#">Link</a></li><li>Transportation electrification and micro grids <a href="#">Link</a></li><li>Real Time Settlement P2 <a href="#">Link</a></li></ul>	<ul style="list-style-type: none"><li>RC Informational Statement</li><li>After-the-Fact EIM Manual Dispatches from ISO systems</li><li>Validate Mitigated prices in DA, RTPD (FMM) and RTD</li><li>Calculation of meter data for TG resources</li><li>Energy Transfer System Resource (ETSR)</li><li>Pricing node (Pnode) price used for CRR Settlement</li></ul>



topics to us at [twitter.com/isosettlements.com](https://twitter.com/isosettlements.com)

# Recent Tweets

 @ISOSettlements Retweeted

 **ISO Notices** @ISONotices · 1h ...  
@California\_ISO posts new proposed revision requests reflecting edits to Business Practice Manuals: [ow.ly/s0zb50FPhJP](https://ow.ly/s0zb50FPhJP)

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 **@ISOSettlements** @isosettlements · 2h ...  
PRR 1366 for Emergency Release for Intertie Deviation Settlement penalty correction for Hour-Ahead Scheduling Process market disruption details is available at this time to allow additional time to review and submit comments. [ow.ly/RM7K50FP6qn](https://ow.ly/RM7K50FP6qn)

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 **@ISOSettlements** @isosettlements · Aug 5 ...  
The Settlement User Group posts the presentation and audio from the 8/4/21 web conference call. [ow.ly/qCrY50FHij](https://ow.ly/qCrY50FHij)

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 **@ISOSettlements** @isosettlements · Aug 3 ...  
The presentations from the 7/26 and 7/29 Market Simulation conference calls have been posted. [ow.ly/U9RF50FHlcQ](https://ow.ly/U9RF50FHlcQ)

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 **@ISOSettlements** @isosettlements · Jul 22 ...  
The Settlement User Group has posted the presentation and audio from the 7/21/21 web conference call. [ow.ly/nWUM50FxRWn](https://ow.ly/nWUM50FxRWn)

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 **@ISOSettlements** @isosettlements · Jul 21 ...  
The presentations from the 7/12 and 7/15 Market Simulation conference calls have been posted. [ow.ly/YCEy50FxRZh](https://ow.ly/YCEy50FxRZh)

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# 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						
Su	Mo	Tu	We	Th	Fr	Sa
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February						
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March						
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28	29	30	31			

April						
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May						
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June						
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July						
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August						
Su	Mo	Tu	We	Th	Fr	Sa
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29	30	31				

September						
Su	Mo	Tu	We	Th	Fr	Sa
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26	27	28	29	30		

October						
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31						

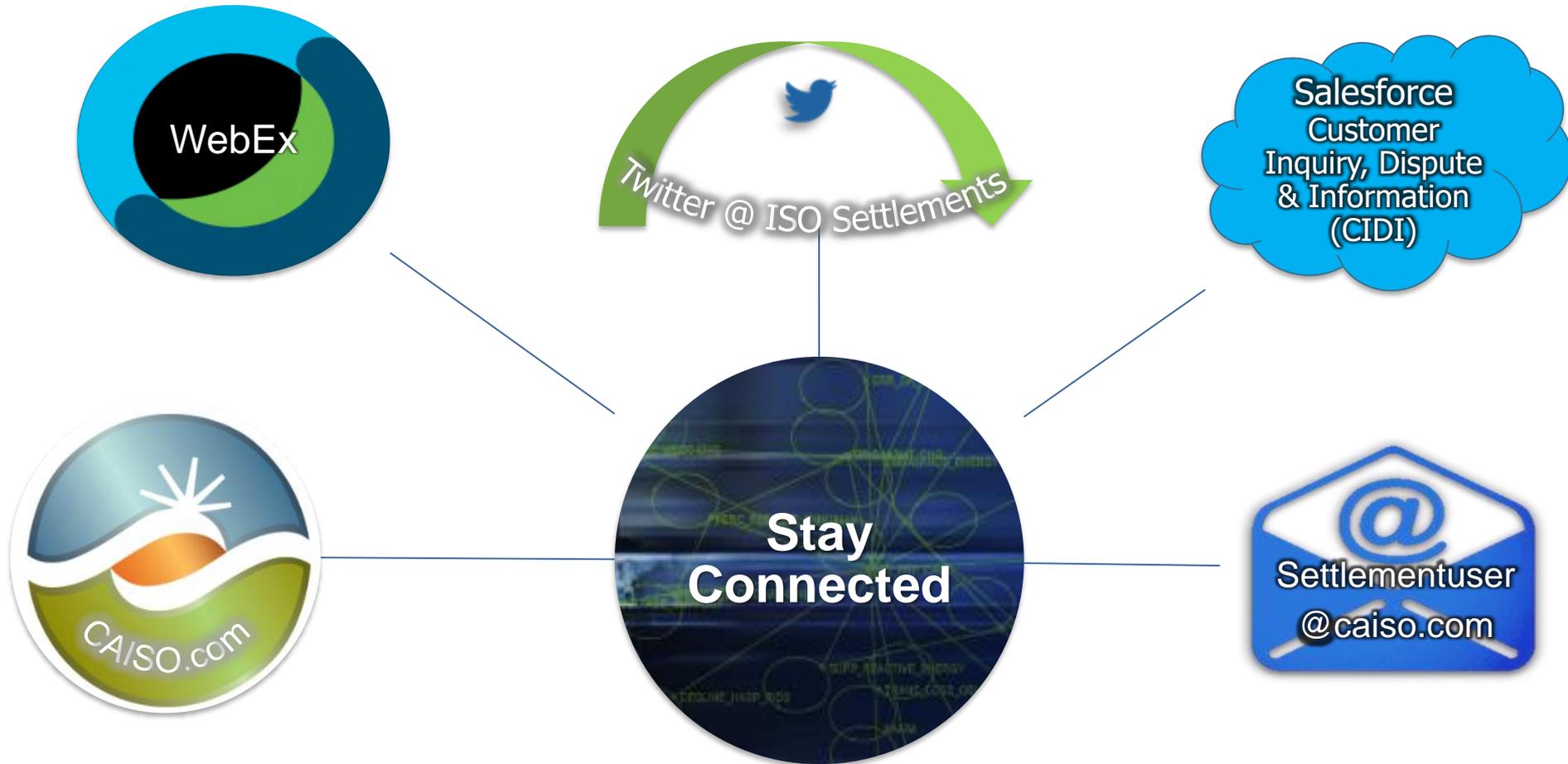
November						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
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21	22	23	24	25	26	27
28	29	30				

December						
Su	Mo	Tu	We	Th	Fr	Sa
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26	27	28	29	30	31	

Meeting
  Agenda posted
  Holiday

# Next SUG Meeting: Sep 1, 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						
Su	Mo	Tu	We	Th	Fr	Sa
						1
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						

February						
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28						

March						
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14	15	16	17	18	19	20
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28	29	30	31			

April						
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23	24	25	26	27	28	29
30	31					

June						
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July						
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August						
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29	30	31				

September						
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October						
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31						

November						
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28	29	30				

December						
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Meeting
  Agenda posted
  Holiday

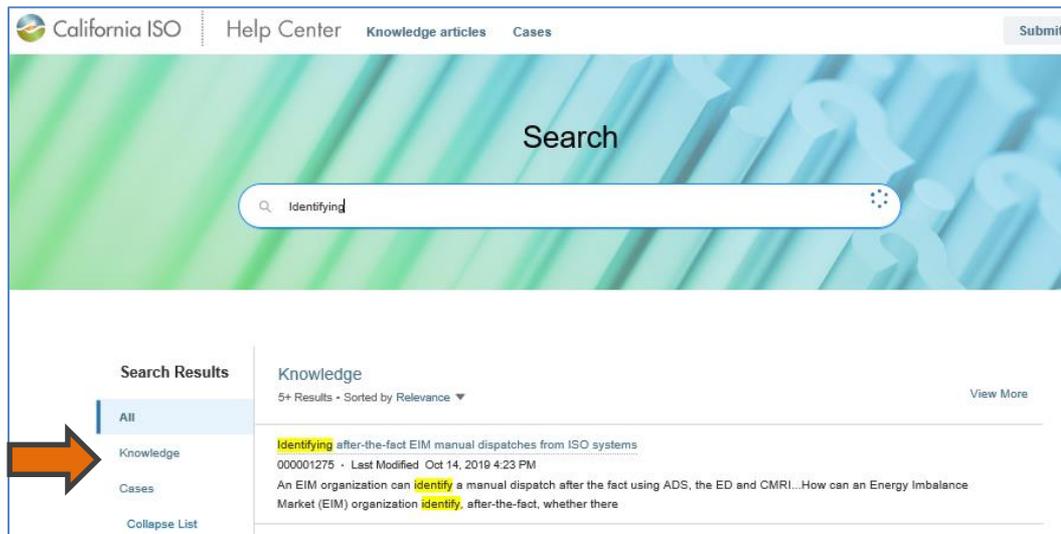
# Knowledge Articles

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
- Calculation of meter data for TG resources
- Pricing node (Pnode) price used for CRR Settlement
- In relation to the Day-Ahead Nodal Pricing Model, the California ISO has posted a Market Analysis report to its website for market participant review. [Nodal Pricing Model Report v1](#)

# 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 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