

**DYNAMIC TRANSFER INTRODUCTORY MEETING AGENDA / CHECKLIST**

- 1) **Attendees** \_\_\_\_\_
- 2) **Purpose of Coordination Meeting:** To get the details about the project, determine all affected parties (internal and external), instructions to move the process forward and critical timelines.
- 3) **Dynamic Schedule**  / **Import**  or **Export**     **Pseudo-Tie**  / **Import**  or **Export**

Resource ID:	CAISO Internal #:	Dynamic Schedule	Pseudo-Tie
MW to CAISO (% of total resource):			
Resource type:			
Resource name:			
Implementation Date / Project Completion Date:			
Pont Of Delivery (POD) (Point Of Receipt (POR)) / Intertie:			
Host Balancing Authority (BA) / Native BA: (Contracts rep?)			
Intermediary BAs:			
Resource owner:			
Scheduling Coordinator (SC):			
Transmission route/service:			
Any need for curtailment by intermediary BAs?			
Ancillary Service? Type: (Spin/non-spin/Regulation Up (RU) / Regulation Down (RD))			
Pseudo-Tie registered with North American Energy Standards Board (NAESBE)?			

- 4) **New Resource Implementation:** Requirements and Bucket Item Documentation
- a. Transmission Service rights verification in each BA – **For both types of Dynamic Transfers** / Interconnection Agreement with Native BA – **For Dynamic Transfer Pseudo-Tie only**
  - b. SC association letter – **For both types of Dynamic Transfers**
  - c. POD (POR) – **For both types of Dynamic Transfers** / Intertie - **For Dynamic Transfer Pseudo-Tie only**
  - d. Generator Resource Data Template - **For both types of Dynamic Transfers**

- 5) **Dynamic Transfer Agreements for Dynamic Schedule:**
- a. Dynamic Scheduling Host Balancing Authority Operating Agreement (“DSHBAOA”) 
    - i. This is a pro forma agreement negotiated between the CAISO and the Host Balancing Authority, which does not require a FERC Filing unless the intent of the pro forma language has been altered in any way. It only includes provisions for Dynamic Schedules. If the Host BA already holds a DSHBAOA then schedules can be revised with agreement between the parties. The DSHBAOA is Appendix B.9 of the CAISO Tariff. **or:**
    - ii. This is a non-pro forma agreement between the CAISO and the Native Balancing Authority which requires a FERC Filing. This agreement incorporates both Dynamic Schedule and Pseudo-Tie requirements to enable these services. If the Balancing Authority already holds a DTBAOA then it is possible that the agreement may allow for revisions to schedules without a FERC Filing. However, if an amendment is required to the body of the agreement then this will require a FERC Filing (60-days).
  - b. The Host or Native Balancing Authority will have to be certified with WECC, if it is a new Balancing Authority.
  - c. Scheduling Coordinator Agreement (“SCA”) 
    - iii. To participate in the CAISO market, a company must be a certified Scheduling Coordinator or retain the services of a certified Scheduling Coordinator to act on their behalf.
  - d. Dynamic Scheduling Agreement for Scheduling Coordinators (“DSASC”)
    - iv. This is a pro forma agreement between the CAISO and a Scheduling Coordinator regarding the terms by which a Scheduling Coordinator may submit Dynamic Schedules.

- Dynamic Transfer Agreements for Pseudo-Tie:**
- a. Dynamic Transfer Balancing Authority Operating Agreement (“DTBAOA”)
    - i. This is a non-pro forma and negotiated between the CAISO and the Native Balancing Authority which requires a FERC Filing. If the Native Balancing Authority already holds a DTBAOA then it is possible that the agreement may allow for revisions to schedules without a FERC Filing. However, if an amendment is required to the body of the agreement then this will require a FERC Filing (60-days).
    - ii. The Native Balancing Authority will have to be certified with WECC, if it is a new Balancing Authority.
  - b. Pseudo-Tie Participating Generator Agreement (“PPGA”)
  - c. Meter Service Agreement for CAISO Metered Entities (“MSACAIOME”) or Meter Service Agreement for Scheduling Coordinators (MSASC).
  - d. Scheduling Coordinator Agreement (“SCA”)

- 6) **Operational Readiness notes:** \_\_\_\_\_
- 7) **EMS Testing notes:** \_\_\_\_\_
- 8) **Other notes / action items:** \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_