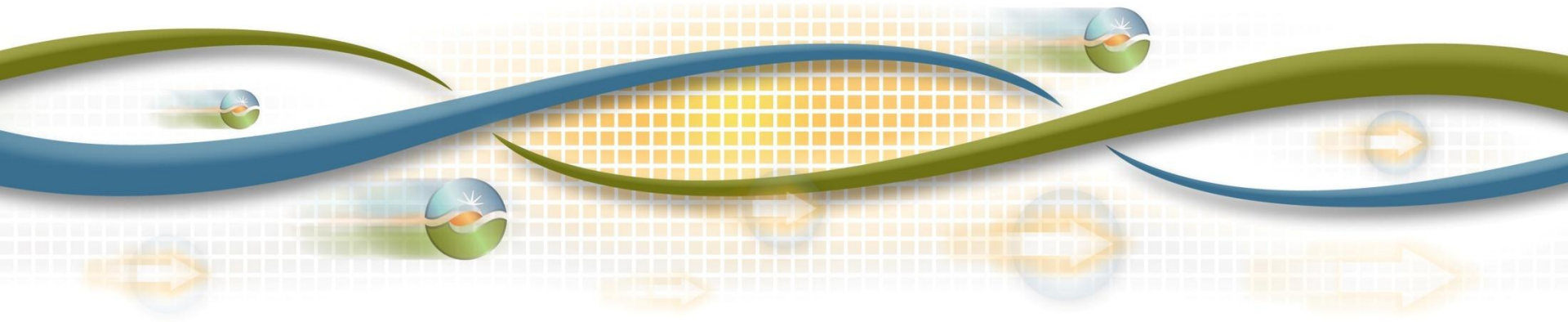




## Metering Rules Enhancements

### *Draft Final Proposal*

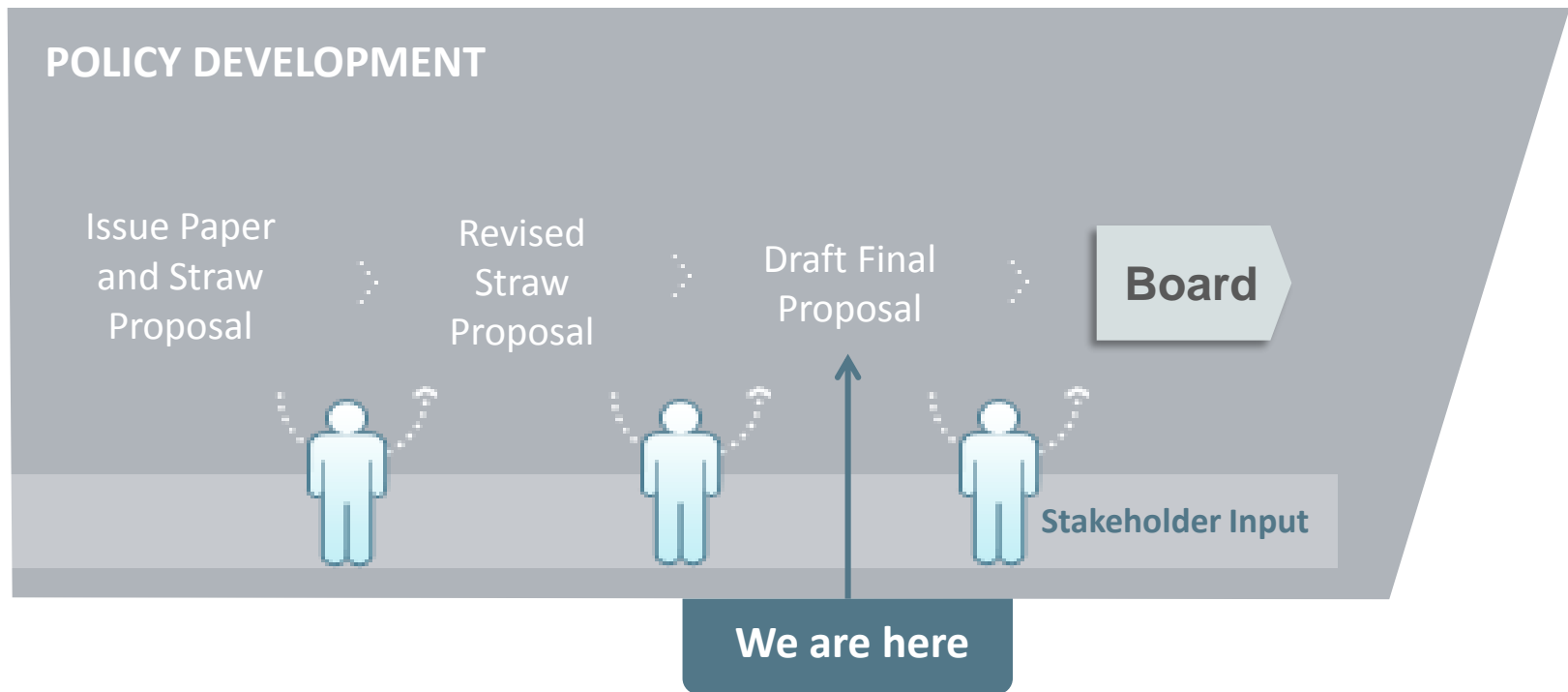
Stakeholder web conference  
June 14, 2016  
9:00 – 12:00 (Pacific Time)



# Agenda

<b>Time</b>	<b>Agenda Item</b>	<b>Speaker</b>
9:00-9:10	Introduction, stakeholder process	Tom Cuccia
9:10-11:10	Draft final proposal	Mike Russell
11:10-11:15	Next Steps	Tom Cuccia

# ISO Stakeholder Initiative Process



# Stakeholder process schedule

Step	Date	Event
Issue Paper and Straw Proposal	February 23	Post issue paper and straw proposal
	March 3	Stakeholder web conference
	March 17	Stakeholder comments due
Revised Straw Proposal	April 19	Post revised straw proposal
	April 26	Stakeholder web conference
	May 10	Stakeholder comments due
Draft Final Proposal	June 7	Post draft final proposal
	June 14	Stakeholder web conference
	June 28	Stakeholder comments due
Board Approval	Aug. 31 – Sep. 1	Board of Governors meeting

# Draft Final Proposal

## Draft final proposal unchanged from revised straw proposal, however additional clarification provided

- Annual testing of metering facilities.
- UDC-to-UDC intratie points.
- SQMD Resource Template.
- Frequency of SQMD Plan audits and re-evaluation.
- Professional engineer stamp on submitted electrical schematics.
- Absence of metering standards set by local regulatory authorities.
- Expanded particular ISOME and general requirements proposed for modification.

# Summary of draft final proposal

1. Provide existing metered entities the option to retain current requirements and maintain their status quo, or instead to opt for (2) and (3).
2. Allowing SCs the option to submit SQMD for SCME resources represented.
3. Require submittal of a SQMD Plan by SCs opting to submit SQMD for SCME resources represented.
4. Modify ISOME and general requirements associated with a particular exemption requests.

# Provide existing metered entities the option to maintain status quo

- Recognizes investments made in existing metering infrastructure.
- Existing ISOME and SCME not required to change or take advantage of new option.
- Submission of SQMD Plan not required.



## Allow SCs the option to submit SQMD for SCME resources represented (load, generation and tie resources)

Under this option SCs would be able to:

- Acquire, process, and submit SQMD for generation resources they represent.
- Acquire, process, and submit SQMD for their load resources by following the requirements of an applicable LRA, or by calculating their load from qualified tie meters and generator meters.
- Process and submit SQMD for tie resources when the interchange checkout data is unavailable.

## Allow SCs the option to submit SQMD for SCME resources represented – *continued*

- Existing SCME metering requirements will apply.
- No new size restrictions imposed on SCMEs.
- SCs that elect to take advantage of this option will be required to develop and submit an SQMD Plan.
- ISOME possessing an exemption may opt to become SCME and document in SQMD Plan.
- Following implementation of proposal, all new market participants (including those electing to participate in EIM) that choose SCME would not need to request an exemption but would instead submit an SQMD Plan.

## Allow SCs the option to submit SQMD for SCME resources represented – *continued*

### Testing of metering facilities:

- Existing SCME requirement: Each SC shall at least annually conduct audits and tests of metering facilities of the SCME that it represents and the meter data provided to the SC.
- ISO proposes to bring SCME requirements in line with ISOME requirements on testing and auditing, which recommends tests and audits at least once every two years.

## Allow SCs the option to submit SQMD for SCME resources represented – *continued*

To address possibility of discrepancies/disputes related to SQMD submission at UDC-to-UDC intratie points:

- ISO proposes to require that UDCs that wish to obtain their own UFE calculations are ISOME.
  - ISO would not allow SCs representing such UDCs to submit SQMD.
- ISO does not view a tariff requirement that adjacent UDCs must come to agreement on metering used to be a viable solution.
  - Inability to enforce compliance on generator owners associated to intratie meters in a non-participating UDC area.

## Require submittal of an SQMD Plan by SCs opting to submit SQMD for SCME resources represented

- Provides SC opportunity to demonstrate that the meter data submitted to ISO will be settlement quality.
- SC must submit an annual self-assessment where its management attests to implementation/adherence.
- ISO reserves right to perform audits and inspections on the implementation and use of each SQMD Plan.
- Any SQMD Plan that proves inadequate is subject to revision to ensure it produces SQMD.
- ISO is suggesting it have 20 business days to review a submitted SQMD Plan.
  - Review would begin upon receipt of a complete SQMD Plan.

# ISO has developed a draft SQMD Plan and draft SQMD Resource Template

- Draft SQMD Plan was attached to the revised straw proposal.
  - Topics include: definitions; responsibility; agreements; market participation; quality assurance; audits; and corrective actions.
- Draft SQMD Resource Template (to provide information on each resource) was added to the draft final proposal.
  - Topics include: contact information; resource information; metering devices; data collection, validation, and submission; resource algorithm (breakdown); and audits and testing.

Require submittal of an SQMD Plan by SCs opting to submit SQMD for SCME resources represented –  
*continued*

Frequency of SQMD Plan audits and re-evaluation:

- Annual SC self-audit requirement applies.
- All other related submittal materials will need to be re-evaluated
  - when there is a modification to the existing approved SQMD Resource Template, or
  - when data submission practices warrant additional review by the ISO based on inconsistent and/or abnormal meter data submitted.

Require submittal of an SQMD Plan by SCs opting to submit SQMD for SCME resources represented –  
*continued*

Professional engineer stamp on submitted electrical schematics:

- Professional engineer's stamp is required on single line diagrams provided as supporting documentation.
- This is an existing requirement.



Require submittal of an SQMD Plan by SCs opting to submit SQMD for SCME resources represented –  
*continued*

Absence of metering standards set by a local regulatory authority:

- ISO is looking to leverage some of the existing meter standards captured in Metering BPM Attachments A and B.
- These standards reference physical metering elements and should not be misconstrued with SQMD data submission practices.

## Modification of ISOME and general requirements associated with particular exemption requests

- Certain exemption requests frequently requested and granted may indicate where a change in the associated ISOME requirement merits consideration.
- Tariff section 10.2.6 requires that RQMD be provided to ISO directly; however, ISO may exempt an entity from this requirement if installation of communication links is unnecessary, impracticable or uneconomic.
- ISO proposes to allow communication of meter data to the ISO's RMDAPS via a method that assures the confidentiality and integrity of the data.

## Modification of ISOME and general requirements associated with particular exemption requests *(continued)*

- Tariff section 10.3.2.2 states, “Subject to any exemption granted by the ISO, SCs must ensure that SQMD submitted to the ISO is in intervals of five minutes for loads and generators providing AS or IE, and one hour for other SCME.”
- ISO has granted two class exemptions effective indefinitely that are relevant to this requirement.
- ISO proposes to revise its tariff such that the rule in section 10.3.2.2 and for all resources is consistent with these class exemptions.

# Next Steps

Request stakeholder comments by COB June 28<sup>th</sup>

Be sure to use comments template provided

Submit to comments mailbox:  
[initiativecomments@caiso.com](mailto:initiativecomments@caiso.com)

Step	Date	Event
Draft Final Proposal	June 7	Post draft final proposal
	June 14	Stakeholder web conference
	<b>June 28</b>	<b>Stakeholder comments due</b>

Thank you!