



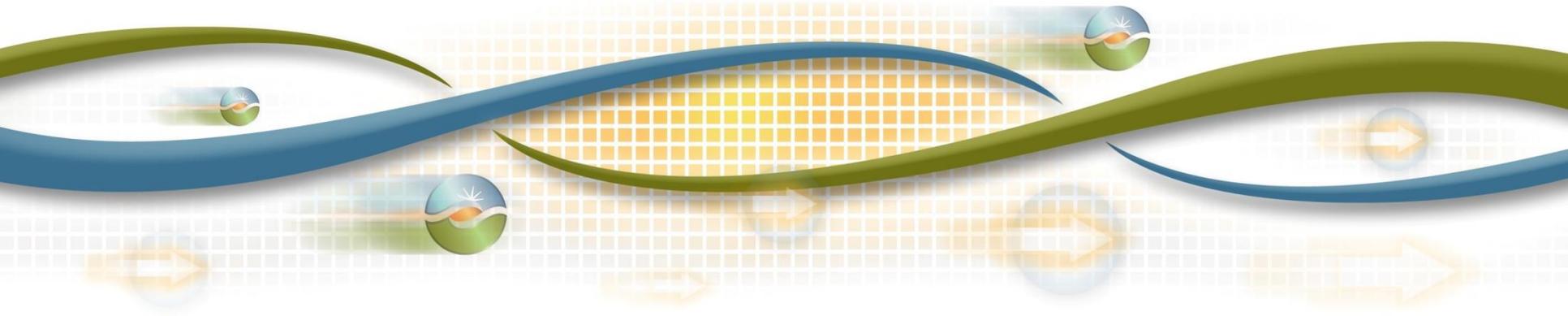
BPM Change Management Meeting

June 27, 2017

Julia Payton

BPM Change Management Process

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Agenda – BPM Change Management Meeting, June 27, 2017

Topic	Presenter
Introduction/meeting overview	Julia Payton
<u>Discussion of current PRRs:</u> Settlements and Billing Market Operations Generator Interconnection and Deliverability Allocation Procedures Generator Management	Bonnie Peacock Jamal Batakji Phelim Tavares Raeann Quadro
PRRs to be discussed at later date Wrap up and next steps	Julia Payton

California ISO Stakeholder Initiative Process:



- Business Practice Manuals
 - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
 - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
 - *Policy changes submitted through the PRR process will be referred to the policy initiative road map process.*
 - Each subject area in a BPM is based on enabling language in the ISO tariff.
 - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

PRRs for Discussion – Recommendation Phase

Settlements and Billing BPM

PRR	PRR Title
988	Emergency: Update configuration guides to ensure that balancing authority area(s) which has declared a market interruption are not assessed over and under-scheduling EIM over and under-scheduling EIM allocation during the market interruption periods
989	Emergency: Updated BPM Configuration guides for PC RUC No Pay Quantity to accommodate the fact that the RUC No Pay calculations were incorrectly did not incorporate the FMM minimum load energy quantity implemented with FERC 764 on 5/1/2014

PRRs for Discussion – Recommendation Phase

PRR	CC/ PC	Comment Expiration / Next Step	ISO Position / Reason for Revision
988	<p>CC 6045 - Over and Under Scheduling EIM Settlement</p> <p>CC 6046 - Over and Under Scheduling EIM Allocation</p>	<p>No Recommendation comments submitted</p> <p>Recommendation comment period expired 6/14/17;</p> <p>Next Step: Final Decision</p>	<p>No changes since the last meeting.</p> <p>If the Market Operator declares a Market Interruption for a specific Balancing Authority Area (BAA), Settlements will exclude that BAA for assessment of Over and Under-Scheduling EIM Settlement, and Allocation, for the duration of the Market Interruptions.</p> <p>As part of the Market Interruption conditions, the BAA Real Time Market Transfer Capacity will be locked at BAA's Base Schedule EIM Transfer Quantity. Because the EIM Transfer is set to base transfers and the EIM Operator is responsible for dispatching resource to resolve load variations, the assessment of Over and Under-Scheduling EIM Settlement for that BAA is moot. In addition, during Market Interruption periods, the affected BAA should not receive an allocation (payment) from the charge assessed to other BAAs Over and Under-Scheduling EIM Settlement.</p> <p>The implementation date was 4/24/2017 to support a 3/1/17 production effective date.</p>
989	<p>Pre-calculation RUC No Pay Quantity</p>	<p>No Recommendation comments submitted</p> <p>Recommendation comment period expired 6/14/17;</p> <p>Next Step: Final Decision</p>	<p>No changes since the last meeting.</p> <p>A dispute revealed that rescission of RUC awarded capacity was occurring despite the units performing according to dispatch. With FERC 764, the minimum load energy input was split into FMM and RTD. The original input was made RTD only, while a new BD was created for FMM. The RUC No Pay calculation was not updated to use this new FMM minimum load energy quantity.</p> <p>Resolution involves inserting and summing the FMM minimum Load energy input with the already existing RTD minimum Load energy input in four formulas.</p> <p>The change is retroactive to the implementation of FERC 764 and the FMM market on 5/1/2014. The implementation date was 4/24/2017.</p>

PRRs for Discussion – Initial Phase Settlements and Billing BPM

PRR	PRR Title
993	Updated the Settlements and Billing BPM main body to clarify dispute process requirements

PRRs for Discussion – Initial Phase

PRR	CC/ PC	Comment Expiration / Next Step	ISO Position / Reason for Revision
993	Settlements and Billing Main Body	<p>Initial comments: PacifiCorp; NV Energy</p> <p>Initial comment period expired 6/16/17;</p> <p>Next Step: Recommendation</p>	<p>The dispute sections of the Settlements and Billing BPM main body have been updated to clarify dispute processing descriptions and requirements.</p> <p>The ISO is reviewing and revamping the dispute process in order to provide better customer service and ensure disputes are resolved in a timely manner. To that end and consistent with current business practices, the ISO has clarified the type of information the SC should provide to assist in the timely review of the dispute as well as the manner in which the ISO responds. Specifically, in the absence of the needed information the dispute will be rejected. Additionally, the ISO has clarified the recurring disputes information and the dispute evaluation details.</p> <p>Going forward, the Settlement Dispute Form template will be available to participants as Attachment D to this Settlements and Billing BPM. This template is to be used for manual dispute submittal only when the CIDI system is unavailable.</p> <p>In response to comments submitted:</p> <p>PacifiCorp comments: Updated guide and ISO responses were posted on 6/16. NV Energy comments: ISO responses were posted on 6/20.</p>

PRRs for Discussion – Recommendation Phase

Market Operations BPM

PRR	PRR Title
991	Emergency: Changes to reflect the new tariff requirements and new policy on administrative pricing.

PRR 991 – Changes to reflect the new tariff requirements and new policy on administrative pricing

- Reason for revision:
 - Changes to reflect the new tariff requirements and new policy on Administrative pricing. Effective May 2, 2017
- Recommendation stakeholder comments:
 - No comments submitted
- ISO response/position:
 - ISO submitted the PRR on 4/28/17
- Recommendation comment period expiration:
 - June 14, 2017
- Next step: Post Final Decision

PRRs for Discussion – Recommendation Phase Generator Interconnection and Deliverability Allocation Procedures BPM

PRR	PRR Title
982	Submitted by Large-Scale Solar Association: Phased Third Interconnection Financial Security Posting Clarifications

PRR 982 – Phased Third Interconnection Financial

- Reason for revision:
 - Title change: To match the associated tariff provision and avoid confusion with policies related to Project generation-project phasing. Other changes: Clarifications of existing CAISO policy
- Recommendation stakeholder comments:
 - No recommendation comments submitted
- ISO response/position:
 - ISO posted recommendation 6/2/17
- Recommendation comment period expiration:
 - June 14, 2017
- Next step: Post Final Decision

PRRs for Discussion – Initial Phase Generator Interconnection and Deliverability Allocation Procedures BPM

PRR	PRR Title
992	Submitted by Large-Scale Solar Association: Interconnection Study Information

PRR 992 – Interconnection Study Information

- Reason for revision:
 - Adding the below information in the Phase I and II study reports:
 - Whether the project is located in a Local Capacity Area identified in the latest Local Capacity Technical Study (LCA) and, if so, the specific LCA
 - The expected Pricing Node (PNode) and Aggregated Pricing Node (APNode) for the project
- Initial Comments:
 - PG&E Comment posted 6/20/17
- ISO Position: ISO posted response on 6/20/17.
- Initial comment period expiration:
 - June 14, 2017
- Next step: Post Recommendation

PRRs for Discussion – Initial Phase Generator Management BPM

PRR	PRR Title
994	Clarifying changes to generator retirement process

PRR 994 – Clarifying changes to generator retirement process

- Reason for revision:
 - The CAISO submits these changes to clarify the process for retiring or mothballing a Generating Unit, specifically, the changes clarify the method for determining the retained Deliverability, and re-categorizes the “Mothball” process to Scenario 4, with disclaimer pursuant to the Temporary Shut Down of Resource Operations Stakeholder initiative (“TSRO”).
 - Subsequent changes were made to provide clarity to the process for Scheduling Coordinators (“SC”) who submit Settlement Quality Meter Data (“SQMD”) Plans for SC metered entities.
 - Correction made to the TSRO Initiative title replacing “Suspension” with “Shut Down”.
- Initial Comments: No comments submitted
- ISO submitted PRR 6/1/17
- Initial comment period expiration:
 - June 16, 2017
- Next step: Post Recommendation

Next Steps

Next Meeting:
July 25, 2017

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