

CAISO Public – For Stakeholder Review

E-Tagging Your CAISO Market Awards

Market Data Required in Misc. Info. Field

Upon receiving a CAISO Market Award on an intertie flowgate, the responsible PSE must submit a NERC e-Tag to physically schedule energy or capacity delivery. The CAISO Interchange Transaction Scheduler verifies that each Request for Interchange (e-Tag) has a valid market award. Therefore, market award data must be cross-referenced on each e-Tag. This will be in the form of a Resource ID or a Transaction ID.

Market Data Requirement in Misc. Info. Field for Resource ID

Exactly 3 data elements (Token/Value pairs) are required to facilitate confirmation of the market award in the form of a Resource ID, as depicted below. A market award represents the transmission reservation on the associated CAISO intertie flowgate and associated physical segments of the scheduling path used on the CAISO Controlled Grid. Any incorrect element(s), extra element(s) or missing element(s) will result in an **e-Tag adjustment to zero** before the e-Tag is scheduled to flow, with no exceptions.

The market award information in the form of a Resource ID shall be provided in the Misc. Info. Field of the Physical Path. The required Misc. Info market data should appear on the first and/or last line (Import/Export respectively) where the CAISO is designated the responsible BAA in the SE column, on the e-Tag.

The following table represents the required CAISO Market Award data format for the Misc. Info. Field:

TOKEN	VALUE
CAISO_CONTRACT	Your Contract Reference Number (CRN) used for Existing Transmission Contracts (ETC), Transmission Ownership Rights (TOR) or Converted Rights (CVR), as registered in the CAISO Master File, or “NONE” for Market Transmission
CAISO_PRODUCT	“ENGY”, “SPIN”, or “NSPN”
CAISO_RES_ID	Your Resource ID as registered in the CAISO Master File

The green, "Yes", on the example below is where the Misc. Info. is located on an e-Tag, as shown:

CISO Tagging Template							
CRAG to NP15							
CRAG							
Physical Path							
CA	TP	PSE	POR	POD	Sched Entities	Contract	Misc
	"....."	"....."	"....."	CRAG	PACW		
	CISO	"....."	CRAG	NP15	CISO		Yes
	CISO	"....."	NP15	"....."	CISO		

Misc. Info	
Token	Value
CAISO_CONTRACT	XXXXXXXXXX
CAISO_PRODUCT	XXXX
CAISO_RES_ID	XXXX_XXXX_X_X_XXXXXX

Market Data Requirement in OASIS field for Transaction ID

A market award in the form of a Transaction ID is also required to facilitate confirmation of the market award to include the Transaction ID as depicted below. A market award represents the transmission reservation on the associated CAISO intertie flowgate and associated physical segments of the scheduling path used on the CAISO Controlled Grid. Any incorrect element(s), extra element(s) or missing element(s) will result in an **e-Tag adjustment to zero** before the e-Tag is scheduled to flow, with no exceptions.

The market award information in the form of a Transaction ID shall be provided in the OASIS field of the Transmission Allocation section of the e-Tag. The required OASIS market data should appear on the first and/or last line (Import/Export respectively) where the CAISO is designated the responsible BAA in the SE column, on the e-Tag. It is not required, but acceptable, to place the Transaction ID in the Misc. Info. field of the Physical Path.

The following table represents the required CAISO Market Award data format for the OASIS field:

Transmission Allocation			
TP	Owner	Product	OASIS
“_____”	“_____”	“_____”	“_____”
CISO	“_____”	“_____”	XXXX-XXXX_XXX-XXXX-XXXX-X-X-X-XXXX

Business Rules for e-Tagging within the CAISO

Static Interchange Schedules – A separate NERC e-Tag must be submitted for each type of Market Award for Energy, Spin or Non-Spin. Separate tags must be made for each of these product types to facilitate validation of tagged interchange with the respective Market Awards for Energy, Spinning Reserves or Non-Spinning Reserves. While a single Market Resource ID MAY be used to bid multiple Market products into the CAISO Market on the ties, separate tags are required to facilitate the Interchange Schedule (e-Tag) validation process. CAISO’s Interchange transaction scheduler compares the Product type shown on the e-Tag, in the CAISO_PRODUCT Token/Value pair (ENGY, SPIN, or NSPN) with CAISO Market Awards to validate each e-Tagged Interchange Schedule. Only one Product code can appear on each e-Tag. Transaction IDs may only have the product type Energy.

Dynamics are the exception.

Dynamic Interchange Schedules - A single tag MAY be used for Energy and Ancillary Service Awards for Dynamic schedules only. *Reserves delivered via Dynamic Interchange Schedules must be on Firm Transmission Service for all line segments.* The CAISO_PRODUCT Token used on Dynamic tags should always be “ENGY”. Place the total MW value for all Market Awards, energy and capacity, in the Transmission Profile, and the actual Energy award MW value in the Energy Profile of the e-Tag. If Awarded AS capacity is subsequently dispatched as Energy, then the Dynamic e-Tag Energy Profile shall be updated to reflect the final integrated quantity of Energy delivered via this Dynamic Interchange Schedule, inclusive of both Energy and AS Energy as dispatched.

Tagging instructions for use of multiple types of Transmission rights – When using a single Resource ID to schedule use of more than one type of transmission, for example use of both Energy Bid Curve and contract rights using a Contract Reference Number (CRN), each transmission award must be separately tagged. – This situation can occur if Energy is Awarded to both an Energy Bid and the ETC, TOR, or CVR Self Schedule with the MW allocation using a single Resource ID. The responsible SC’s PSE must submit two NERC e-Tags, one for the Energy Bid Award and one for the ETC/TOR/CVR award, each with the same ResID.

POD/PORs Representing CAISO Market as a Whole – Historically, e-Tags for interchange schedules with the CAISO market have used a Point of Delivery (POD) or Point of Receipt (POR) of either “NP15” or “SP15”, which represent the CAISO’s end of interties into Northern or Southern California. Because these PODs and PORs have created uncertainty in some cases concerning the usage of these designations, the CAISO has also established POD/PORs of “CISOSYS.NP15” and “CISOSYS.SP15” to represent transactions with the CAISO market as a whole rather than delivery to specific loads, for optional use as the source or sink of an e-Tag. Upon request by a market participant to its client representative, the CAISO will register the use of CISOSYS.NP15 or CISOSYS.SP15 as a POD or POR for that market participant. When the responsible PSE then uses CISOSYS.NP15 or CISOSYS.SP15 as a POD or POR, the e-Tag must include a transmission segment linking it with either NP15 or SP15, as either the first or last transmission segment in addition to the transmission path that would otherwise be stated in the e-Tag. For example, in the CISO Tagging Template illustrated above, the transmission segment from CRAG to NP15 would be followed by a segment from NP15 to CISOSYS.NP15, and the sink would then be CISOSYS.NP15 instead of NP15. When a PSE is associated with the source or sink at CISOSYS.NP15 or CISOSYS.SP15, it is understood that the PSE does not become directly responsible for owning or operating generation, or serving end-use customers, but rather is responsible for transactions with the CAISO market as provided through the CAISO tariff.

Questions? Please contact Interchange Scheduling at scheduling@caiso.com