Transmission Service and Market Scheduling Priorities – Phase 2 (TSMSP 2)

Track 2 – Daily Process

Rev 4/9/2024
- Fixed OASIS Tech Specs location link (slide 53)
- Updated total to webWheel capacity release examples (starting slide 36)
Housekeeping

- **REMAIN MUTED**
  Keep yourself muted to minimize background noise

- **ASKING QUESTIONS**
  Unmute to ask verbal questions or write in the chat pod

- **RAISING HAND**
  Raise your hand using WebEx interactivity tools

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Our Meeting Agenda

Today we will cover...

• Recap TSMSP2 Track 1 – Monthly Process
• Understand and walkthrough the application-specific details for daily process
• Prepare for market simulation and readiness activities
# Acronyms

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Term</th>
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</thead>
<tbody>
<tr>
<td>ATC</td>
<td>Available Transfer Capability</td>
</tr>
<tr>
<td>CIRA</td>
<td>Customer Interface for Resource Adequacy</td>
</tr>
<tr>
<td>DAM</td>
<td>Day-Ahead Market</td>
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<tr>
<td>IRDT</td>
<td>Intertie Resource Data Template</td>
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<tr>
<td>NLN</td>
<td>Native Load Needs</td>
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<tr>
<td>OASIS</td>
<td>Open Access Same-time Information System</td>
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<tr>
<td>PWT</td>
<td>Priority-Wheeling-Through</td>
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<tr>
<td>SC</td>
<td>Scheduling Coordinator</td>
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<td>SIBR</td>
<td>Scheduling Infrastructure and Business Rules</td>
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<td>TRM</td>
<td>Transmission Reliability Margin</td>
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<td>TTC</td>
<td>Total Transfer Capability</td>
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<td>UI</td>
<td>User Interface</td>
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<td>WAC</td>
<td>Wheeling Access Charge</td>
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</table>
NEW PROCESS FOR ESTABLISHING WHEELING THROUGH PRIORITY

- Available Transfer Capability (ATC) is secured in advance on the ISO interties to establish wheeling through priority equal to ISO load.
  - ATC can be reserved in
    - Monthly increments (13-month horizon)
    - Daily increments (7-day horizon).

- Wheeling through transactions without secured ATC in advance will have a lower market clearing priority.
For additional details, refer to the Policy Initiative Page for Transmission Service and Market Scheduling Priorities [link]!
Refresher from TSMSP2 Track 1 – Monthly Process

GAINING ACCESS to webWheel

Master File

✓ Already Registered

☐ Need to Register

➢ 11 BD in advance

New Intertie Resource Request template
New Intertie Resource Request: Register a high-priority wheel

- Submit **New Intertie Resource Request** form via CIDI ticket
  - Scroll down to the **Resource data submission** section to locate the form
GAINING ACCESS to webWheel

Master File

- Already Registered

- Need to Register
  - 11 BD in advance

New Intertie Resource Request template

AIM

Existing SC Contract Types

- Scheduling Coordinator Agreement + MSA/SC
- SCT – Scheduling Coordinator Agreement Only

UAA to provision webWheel access
Recap from Monthly Process Training

Customer Interface for Resource Adequacy (CIRA)
CAISO BAA LSEs
New screen: Native Load Needs (NLN)
CIRA User Guide Section 3.13

Scheduling Infrastructure and Business Rules (SIBR)
Validate Import/Export for power contracts
and review SIBR User Guide Section 3.2.8

Open Access Same Time Information System (OASIS)
New report: ATC for PWT Requests

webWheel
High level overview
How to submit a power contract, request PWT, and view PWT awards.

Settlements
Wheeling Access Charge (WAC) examples and walkthrough

TSMP2 Track 1 – Monthly Process Training Presentation
What Questions Do You Have?

Unmute yourself or Raise your hand
Review Application
Specific Details

OASIS
Web Wheel
SIBR
Settlements
Section Focus

- Walk through requesting priority-wheeling-through (PWT) for the daily process
- Understand the Capacity Release functionality
- Review the PWT Position & Contract Utilization reports.
Specifically for the Daily Process

SUBMITTING PWT REQUESTS & VIEWING AWARDS
Participant Dashboard Refresher

**Submission Window Status**
Provides summary of where the submission process is at:
- **Open**
  - Completed 6 days ago
- **Lock**
  - Completed 6 days ago
- **Award**
  - 16 days ago
- **Publish**

**News and Announcements & Activity Log**
Provides updates on what is happening in the app:
- **News and Announcements**
  - No News and Announcement have been found
- **Activity Log**

**PWT Request Counts**
This area shows participant's requests that have been submitted into the system.

**Records**
Summary of user's information. Remember, users are restricted to only see their information.
Submission Window for Daily Process

- Open for 5 Hours (*between 7am-noon PST each day*)
- Will be defined in the Market Operations BPM

**Monday 3/25/2024**
- Participant can request between 3/27 - 4/1/2024
  - Assume daily request for 3/27 is accepted and awarded
  - Results published on 3/25 @1pm

**Tuesday 3/26/2024**
- Day-Ahead Market for Operating Date 3/27/2024 closes at 10AM

Example located in Appendix
When the Submission Window Opens….

Once the submission window opens, participants will be allowed to enter requests.
Adding a New PWT Request

Click the "new" icon to add a PWT Request
Creating PWT Request – *Period Type*

**Period Type** allows users to choose a Monthly or Daily request.
Creating PWT Request – *Participant, Contract, Import & Export, Product*

By picking the desired **Participant** and **Contract**, the system will populate the **Import/Export Interties** and the defaulted **Product Type**.

<table>
<thead>
<tr>
<th>Period Type</th>
<th>Participant</th>
<th>Contract</th>
<th>Import Intertie</th>
<th>Export Intertie</th>
<th>Product</th>
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<tbody>
<tr>
<td>Daily</td>
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**By picking the desired Participant and Contract, the system will populate the Import/Export Interties and the defaulted Product Type.**
Creating PWT Request – Periods

Periods: There are a number of options available for the daily process (up to 7 day range period).

Suggested period to use for Market Sim is “Date Range”
Creating PWT Request – Profile Type (Flat)

This **Profile Type** is Flat.

Users will be shown their remaining MW and can request the desired amount of MWs to use.
Creating PWT Request – Profile Type (Variable)

This Profile Type is Variable.

Users will be prompted to enter their requested MW as it correlates with the desired month.
Creating PWT Request – Pro-Rata and Accept Partial

Users have the option to request Accept Pro-Rata and/or Accept Partial.”
Submitting the PWT Request – *Status Column*

<table>
<thead>
<tr>
<th>PWT Request ID</th>
<th>Participant</th>
<th>Contract</th>
<th>Import Intertie</th>
<th>Export Intertie</th>
<th>Product</th>
<th>Accept Pro-Rata</th>
<th>Accept Partial</th>
<th>Period Type</th>
<th>Period Start</th>
<th>Period End</th>
<th>Total Hours</th>
<th>Status</th>
<th>Submission Window</th>
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<td>Process</td>
<td></td>
</tr>
</tbody>
</table>
Reviewing PWT Awards

- PWT Requests
- PWT Awards
- Participant Dashboard
- Action Log

No Records Have Been Found
What Questions Do You Have?

Unmute yourself  or  Raise your hand
Understanding where to locate and process

CAPACITY RELEASES
Location: Data tab > Capacity Releases

Capacity Releases
Page that holds participants Contract Capacity Reductions and Contract Terminations

Not tied to the daily process
Capacity Release

The act of releasing PWT ATC back to the market

1. **Contract MW < Awarded MW**
   - Users must reduce the awarded PWT MW positions to the contracted MW.

2. **Service Hours Shorter**
   - Users must cut short the PWT positions to fit the new contracted service hours.

3. **Shorter Contract Duration**
   - Users must cut short the PWT positions to fit the new contract period.

Users must notify the ISO no later than 11 days before the start of the changed contract.
**Capacity Release Summary**

High-level overview of capacity reduction and termination requests.
New Capacity Release Request – Participant and Contract

**Participant** and **Contract** are drop down menus from previous registered information.

Select the desired participant/contract that would like to be utilized.
New Capacity Release Request – *Release Type*

Release Type will have two options for users to select from:

- Contract Termination
- Contract Capacity Reduction

**Important:** For both Contract Termination and Contract Capacity Reduction, users must notify the ISO no later than 11 days before the start of the changed contract.
New Capacity Release Request – *Contract Capacity Reduction*

### New Capacity Release

<table>
<thead>
<tr>
<th>Participant</th>
<th>Contract</th>
<th>Release Type</th>
<th>Original Contract Period</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Contract Capacity Reduction</td>
<td>01/2024 to 12/2024</td>
</tr>
</tbody>
</table>

### Contract Capacity

<table>
<thead>
<tr>
<th>Month</th>
<th>Original Capacity MW</th>
<th>Modified Capacity MW</th>
<th>Awarded MW</th>
<th>Modified Award MW</th>
<th>Total</th>
<th>Award MW Mismatch</th>
<th>Released ATC MW</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/2024</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>02/2024</td>
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</tr>
</tbody>
</table>
New Capacity Release Request – *Contract Capacity Reduction Cont.*

<table>
<thead>
<tr>
<th>Month</th>
<th>Original Capacity MW</th>
<th>Modified Capacity MW</th>
<th>Awarded MW</th>
<th>Modified Award MW</th>
<th>Award MW Mismatch</th>
<th>Released ATC MW</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/2024</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/2024</td>
<td></td>
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</tr>
</tbody>
</table>

**Original Capacity MW:** This is the MWs the ISO awards users

**Modified Capacity MW:** This is how many MWs participants wanted to change their amount to

**Awarded MW:** This is what participants end up receiving

**Modified Award MW:** The PWT awards that participants can modify to fit their contract

**Award MW Mismatch:** Will indicate to participants how many MWs need to be reduced

**Released ATC MW:** Will indicate the MWs reduced during the capacity reduction
New Capacity Release Request – Contract Capacity Reduction Example

User is awarded 352 MW

<table>
<thead>
<tr>
<th>Month</th>
<th>Original Capacity MW</th>
<th>Modified Capacity MW</th>
<th>Awarded MW</th>
<th>100238 (PWT Award)</th>
<th>100253 (PWT Award)</th>
<th>100254 (PWT Award)</th>
<th>Total</th>
<th>Award MW Mismatch</th>
<th>Released ATC MW</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/2024</td>
<td>500</td>
<td>300</td>
<td>352</td>
<td>176</td>
<td>90</td>
<td>86</td>
<td>352</td>
<td>-52</td>
<td>0</td>
</tr>
</tbody>
</table>

-52 MWs

Will need to be 0

Will need to be 52
### New Capacity Release Request – Contract Capacity Reduction Example

**Users will decide where to subtract the -52 MWs from the PWT Awards**

<table>
<thead>
<tr>
<th>Month</th>
<th>Original Capacity MW</th>
<th>Modified Capacity MW</th>
<th>Awarded MW</th>
<th>100238 (PWT Award)</th>
<th>100253 (PWT Award)</th>
<th>100254 (PWT Award)</th>
<th>Total</th>
<th>Award MW Mismatch</th>
<th>Released ATC MW</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/2024</td>
<td>500</td>
<td>300</td>
<td>352</td>
<td>176</td>
<td>90</td>
<td>86</td>
<td>352</td>
<td>-52</td>
<td>0</td>
</tr>
</tbody>
</table>

**Let’s make this a 40 to remove 50 MWs**
New Capacity Release Request – Contract Capacity Reduction Example

<table>
<thead>
<tr>
<th>Month</th>
<th>Original Capacity MW</th>
<th>Modified Capacity MW</th>
<th>Awarded MW</th>
<th>100238 (PWT Award)</th>
<th>100253 (PWT Award)</th>
<th>100254 (PWT Award)</th>
<th>Total Award MW</th>
<th>Award MW Mismatch</th>
<th>Released ATC MW</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/2024</td>
<td>500</td>
<td>300</td>
<td>352</td>
<td>176</td>
<td>40</td>
<td>86</td>
<td>302</td>
<td>-2</td>
<td>50</td>
</tr>
</tbody>
</table>

Notice that the Award MW Mismatch decreases while the Released ATC MW increases.

Let’s make this a 84 to remove the remaining 2 MWs.

-52 MWs
# New Capacity Release Request – Contract Capacity Reduction Example

<table>
<thead>
<tr>
<th>Month</th>
<th>Original Capacity MW</th>
<th>Modified Capacity MW</th>
<th>Awarded MW</th>
<th>100238 (PWT Award)</th>
<th>100253 (PWT Award)</th>
<th>100254 (PWT Award)</th>
<th>Total</th>
<th>Award MW Mismatch</th>
<th>Released ATC MW</th>
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</thead>
<tbody>
<tr>
<td>06/2024</td>
<td>500</td>
<td>300</td>
<td>352</td>
<td>176</td>
<td>40</td>
<td>84</td>
<td>300</td>
<td>0</td>
<td>52</td>
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</tbody>
</table>

**To know if you were successful**

- Award MW Mismatch will be 0
- Released ATC MW -52 (the amount indicated to be released)
### New Capacity Release Request – Contract Capacity Reduction No Impact Example

15 MWs extra

<table>
<thead>
<tr>
<th>Month</th>
<th>Original Capacity MW</th>
<th>Modified Capacity MW</th>
<th>Awarded MW</th>
<th>100238 (PWT Award)</th>
<th>100253 (PWT Award)</th>
<th>100254 (PWT Award)</th>
<th>Total</th>
<th>Award MW Mismatch</th>
<th>Released ATC MW</th>
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<tbody>
<tr>
<td>06/2024</td>
<td>500</td>
<td>315</td>
<td>300</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>300</td>
<td>0</td>
<td>0</td>
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</tbody>
</table>

Since you the Modified Capacity MW is larger than the Awarded MW, there is no change needed.
New Capacity Release Request – *Release Type*

- *Release Type* will have two options for users to select from:
  - Contract Termination
  - Contract Capacity Reduction
The awards will need to be set as 0

Once the contract is updated, webWheel will check PWT positions and re-adjust them for any violations.
Helpful reports to review

PWT POSITION AND CONTRACT UTILIZATION REPORTS
PWT Position and Contract Utilization are two reports that users can use to review their information/request details.
# PWT Utilization Report

The report provides information on PWT Positions at a glance.
# Contract Utilization Report

## Contract Utilization

<table>
<thead>
<tr>
<th>Name</th>
<th>Participant</th>
<th>Product</th>
<th>Period Start</th>
<th>Period End</th>
<th>Profile Type</th>
<th>Submission Window</th>
<th>PWT Request ID</th>
<th>Status</th>
<th>Profile</th>
<th>3/2024</th>
<th>4/2024</th>
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<td>01/01/2025</td>
<td>Variable</td>
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<td>Requested (MW)</td>
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<td>04/01/2025</td>
<td>Flat</td>
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<td>Contract Capacity (MW)</td>
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<td>Remaining (MW)</td>
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</tbody>
</table>

### Contract Totals

- Contract Capacity (MW)
- Total Requested (MW)
- Total Awarded (MW)
- Capacity Released (MW)
- Remaining (MW)
What Questions Do You Have?

Unmute yourself  or  Raise your hand
Scheduling Infrastructure and Business Rules (SIBR)

Section Focus

• Recapping user expectations in SIBR
SCs Scheduling Wheeling Remains the Same

• Review: [SIBR User Guide Section 3.2.8 Wheeling Bid Walkthrough](#)
• No UI Changes
SCs Scheduling Wheeling Remains the Same

What Happens

When it is time to be awarded PWT, the results are sent from webWheel to SIBR to be stored and validated.

User’s Responsibilities

Participants must validate
1. Resources **Import** and **Export** belong to the same contract
2. It is scheduled for the wheel transaction

There can only be one counter resource per Wheeling Transaction for the trading hour.
Section Focus

- Review new report “ATC for PWT Requests” for the daily process
New Report on OASIS, under the Transmission tab called "ATC for PWT Requests"
New Report ATC for PWT Requests – *Daily Process*

<table>
<thead>
<tr>
<th>ATC for PWT Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opr Date: 03/14/2024</td>
</tr>
<tr>
<td>Horizon: Daily</td>
</tr>
<tr>
<td>Market Constraint:</td>
</tr>
</tbody>
</table>

- Calculated initial PWT ATC values
- Priority-Wheeling-Through Awards (PWT)
- Available Transfer Capability (ATC)* Includes ETC
- Total Transfer Capability (TTC)
- Native Load Needs (NLN)
- Transmission Reliability Margin (TRM)

Located on [Developer Portal] >> Tech Specs >> OASIS API URL 7.5.1 Examples & OASIS Interface Specification v7.5.1.pdf
The **DAILY** group zip will contain the data for the selected day (1 Day)
What Questions Do You Have?

Unmute yourself or Raise your hand
Settlements

Section Focus

• Review settlement impacts for PWT
Updates to the Wheel Export Quantity PC

- Wheel Export Quantity Pre-calculation modified
  - Resale calculation & original PWT transaction + existing export quantity calculations

- Indirectly impacts
  - High Voltage Wheeling Access Charge allocation (CC 382)
  - Low Voltage Wheeling Access Charge allocation (CC 383)

- Review WAC Charge for PWT ATC awards on settlement statement

**PRR 1560 for Settlements and Billing BPM**
Recap from Previous WAC Examples

In combination of the new requirement and the current practice, the entity should pay the **maximum of the two**:

1. PWT’s awarded capacity
2. PWT’s actual export schedule.

**CG PC Wheel Export Quantity 5.6**
What Questions Do You Have?

Unmute yourself  or  Raise your hand
Market Simulation Activities

Section Focus
- Unstructured Guided Scenarios
Market Simulation

TSMP2 Daily Process
Unstructured Guided Market Sim starts on: **April 15th**
- View the [CAISO public calendar](#) for full schedule
- View the Unstructured scenario on the [Release Planning](#) page

<table>
<thead>
<tr>
<th>Scenario Number</th>
<th>Unstructured scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Facilitate submission and retrieval of Daily PWT requests and awards.</td>
</tr>
</tbody>
</table>
| ISO Actions     | 1. Define submission windows for Daily PWT requests.  
                  | 2. Verify Daily PWT requests and prepare Daily PWT awards. |
| WEIM Market Participant Actions | N/A |
| ISO Market Participant Actions | 1. Submit PWT requests and verify received awards for Daily process.  
                               | 2. Review PWT ATC awards for Daily process.  
                               | 3. Verify wheeling access charges (WAC) for periods PWT ATC is reserved. |
| Expected Outcome | Participants to verify:  
                  | 1) PWT request submission.  
                  | 2) PWT awards review.  
                  | 3) Review results in OASIS.  
                  | 4) Review PWT awards in SBR  
                  | 5) Review PWT awards in Settlements. |
| Anticipated Settlement Outcome | Verify wheeling access charge for PWT ATC awards |
| Expected Settlement Outcome | Wheel export quantity pre-calc  
                              | CC382- High voltage,  
                              | CC382- low voltage |

[CAISO public calendar](#)

[Release Planning](#)
Functional Environment Options for CIDI Cases

• Inquiries not directly related to Market Simulation issues & when there is no environment impact
  – Ex. Business Requirements Specifications (BRS) comments, implementation questions, feedback, etc.
• Contact: release@caiso.com

• Inquires that are related to the MAP-Stage Environments (non-production)
  – Ex. Connectivity, unanticipated simulation results, etc.
• Contact: MarketSim@caiso.com
What Questions Do You Have?

Unmute yourself or Raise your hand
Wrap Up

Summary, Q&A

• What’s happening next.
Tell us How we Did

Takes 3-5 minutes to complete

Helps us improve future training

Link: https://www.surveymonkey.com/r/caisocoursesurvey
Thank you for your participation!

For clarification on anything presented in this training, send an email to: CustomerReadiness@caiso.com

For any other questions or stakeholder specific questions or concerns, please submit a CIDI ticket.
APPENDIX
Reference Links

Business Practice Manual changes:
BPM Change Management

Business Requirements Specification:

Initiative webpage:
Reference Links

Market Simulation Structured Scenarios:  

Technical Specifications – located on the ISO’s Developer Site which provides detailed descriptions of the API changes for:
  • OASIS

Training Material: TSMSP1  
### Daily Submission Window Example

<table>
<thead>
<tr>
<th>Calendar Date</th>
<th>Daily Cycle</th>
<th>Published Period Start</th>
<th>Published Period End</th>
<th>Request window open</th>
<th>Request window close</th>
<th>Daily results published</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/25/2024</td>
<td></td>
<td>2</td>
<td>7</td>
<td>7:00</td>
<td>12:00</td>
<td>13:00</td>
</tr>
<tr>
<td>3/30/2024</td>
<td>3/30/2024</td>
<td>4/1/2024</td>
<td>4/6/2024</td>
<td>3/30/2024 7:00</td>
<td>3/30/2024 12:00</td>
<td>3/30/2024 13:00</td>
</tr>
<tr>
<td>4/7/2024</td>
<td>4/7/2024</td>
<td>4/9/2024</td>
<td>4/14/2024</td>
<td>4/7/2024 7:00</td>
<td>4/7/2024 12:00</td>
<td>4/7/2024 13:00</td>
</tr>
</tbody>
</table>
### Clicking Pro-Rata and/or Partial

#### PRO-RATA

- **Yes:** Requests can be awarded up to the requested amount for the evaluation period (subset of MWs)
- **No:** Requests must be awarded for the full amount for the evaluation period

#### PARTIAL

- **Yes:** Requests can be awarded for each period included in the request duration (subset of months)
- **No:** Requests must be awarded the same amount for all periods of the request
New webWheel Reports in Detail

**PWT Position** provides insight to PWT requests:
- Participant, Direction & Intertie
- Contract Capacity (MW)
- Requested (MW)
- Awarded (MW)
- Remaining (MW)
- Released (MW)

**Contract Utilization** provides insight on contracts:
- Contract name, Participant & Product
- Period Start/End
- Profile
- Submission Window
- PWT Request ID
- Status
- PWT Position MW details
• There can be a one to many association for Export to Import with a PWT position MW. The Export and Import together per hour in the record are unique.
  – ExportA with ImportB for 45MW
  – ExportA with ImportC for 25MW
  – ExportB with ImportA for 30MW
  – ExportC with ImportB for 10MW
• There can only be one counter resource per Wheeling Transaction for the trading hour.
• ExportA can use either ImportB or ImportC but not both for a trade hour.
Let’s Walk Through Some Examples Together

An entity registers an **Importing** contract at Point A and an **Exporting** contract at Point B.

There are a few scenarios that could occur with their settlement statements.
Example – Entity usage is less than the awarded PWT capacity

Monthly Awards: 100 MW
Daily Awards: 20 MW
Total Awarded MWs: 120 MW
Schedule: 80 MWs
(did not need 40 of the awarded MWs)

WAC Charge
120 MW

*New requirement that WAC is charged against wheeling-through capacity, if its schedule is less

WAC – Wheeling Access Charge
Example – Entity usage is greater than the awarded PWT capacity

Monthly Awards: 100 MW
Daily Awards: 20 MW
Total Awarded MWs: 120 MW
Schedule: 150 MWs

(needed an additional 30MWs)

WAC Charge

150 MW

*It is a current practice that WAC is charged against wheeling-through schedules

WAC – Wheeling Access Charge
• **Original ATC Transaction:** BAHourlyATCReservationIntertieQty
• **Resale:** BAHourlyATCReservationResaleIntertieQty

• WheelExportExcludingPWTResaleQuantity
  – This covers all original export transactions and calculations
  – The PWT transaction is nested within
  – This formula ensures that the resale quantity will not be included

• WheelExportPWTResaleQuantity
  – This is just for the resale

To review this document: [Release Planning](#) >> Summer 2024 settlements release technical documents >> Transmission service and market scheduling priorities phase 2
Example of downloading ATC for PWT for the Day and Month

**DAY EXAMPLE**

If a user wants to download a file for today at 11:30am, it would include
- Current Day
- Binding day
- Remaining 6 days (not binding)

Each day will have its own file that mirrors the UI report

**MONTH EXAMPLE**

If a user wants to download a file for today at 11:30am, it would include
- Current Month
- Binding months
- Remaining 11 months (not binding)

Each month will have its own file that mirrors the UI report
Getting to know webWheel table features

- New contract
- Filter results
- Column configuration & resetting filters
- Font display
- Display views
- Print
- Download (xlsx or CSV)
- Refresh