Market Settlement User Group Meeting Minutes
March 12, 2014

The California Independent System Operator hosts a bi-weekly Market Settlement conference call on Wednesdays at 10:00 am. The meeting provides information to market participants regarding current ISO initiatives and activities affecting the settlement and invoicing processes. It is also an opportunity for participants to provide input and ask questions.

Attendees:
- Elizabeth Caldwell, Tri Huynh, James Lynn, Indu Nambiar

Agenda:
- Introduction – Tri Huynh
- Production Update – Tri Huynh
- BPM Update – Elizabeth Caldwell
- Release & Market Simulation Update – James Lynn
- Open Discussion – Market Participants

Production Update:
- Statements and invoices are publishing on time with no issues to report
- Adjustment details for T+9M, T+18M, and T+35M recalculation settlement statements have been posted to the website
- 2014 NERC/WECC final invoices were published last week on March 7th

BPM Update:
- Updated BPMs posted to PRR 709 and 714 last week, please see SaMC user group communication dated 3/7 and announcements section of identified PRRs
- Additional BPM updates anticipated for 3/14 posting, SaMC user group communication will identify impacted PRRs, BPM guides and change summary

Release & Market Simulation Update:
- Updated configuration output file posted last week, please see SaMC user group communication dated 3/7

Open Discussion:
- Participant requested meeting minutes provided on an ongoing basis

Next Meeting:
Date and Time: Wednesday, March 26th 10 am - 11am
Location: conference call, reference ISO Calendar for call-in information
Agenda: Settlements Production, BPM, and Release/Market Simulation updates
Notes: none

Communication Paths for Settlement Questions
In addition to the Market Settlement User Group Meeting, the ISO has established communication paths for external parties to ask questions. The appropriate path to use is dependent on whether an item is in the development or production processes. In order to ensure participants’ questions are answered timely,
accurately, and the questions/responses can be leveraged by others to avoid internal duplication of effort, please refer to the communication paths listed below for settlements related questions.

If a ‘real time’ market critical issue such as connectivity or inability to participate in the market is encountered, or the ability to access or download settlement statements or invoices is problematic, our Service Desk is available 24x7 at (888) 889-0450 or helpdesk@caiso.com.

Settlement Production Questions:
- For current settlement calculation logic or BPMs posted in the BPM Document Library, submit an “Inquiry Ticket” through CIDI
- For disagreements with the specific settlement calculation results on a settlement statement, submit a “Settlement Dispute” through CIDI
- Indicate ‘Production’ as the Functional Environment.

Settlement Development Questions:
- Questions about forthcoming settlement configuration logic or draft technical documentation provided in support of an active market simulation submit an “Inquiry Ticket” through CIDI and indicate “Market Simulation” as the Functional Environment.
- Questions about forthcoming BPM content noticed through a Proposed Revision Request (PRR), submit through the BPM Change Management application during the available comment periods. The BPM Change Management process for Settlements begins approximately 8 weeks prior to production deployment and during the process there are two 10-day periods during which questions can be submitted.

Click here to access the Market Participant Portal and CIDI to submit inquiries or settlement disputes.

Click here to access the BPM Change Management application to submit questions regarding active PRRs.

Please review these Tips for asking Questions of the ISO, if the above information does not address your need.