



BPM Change Management Meeting

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August 27, 2019

Agenda – BPM Change Management Meeting

August 27, 2019

Topic	Presenter
Introduction / Meeting Overview	Isabella Nicosia
Settlements and Billing BPM	Bonnie Peacock
Outage Management BPM	Abdulrahman Mohammed-Ali
Reliability Requirements BPM	Abdulrahman Mohammed-Ali
Market Operations BPM	Jamal Batakji
Market Instruments BPM	Jamal Batakji
Energy Imbalance Market BPM	Jamal Batakji
Demand Response BPM	Pia Sok
Metering BPM	Michael Ucol
Wrap-Up and Next Steps	Isabella Nicosia

BPM Change Management Process
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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.*

Settlements and Billing BPM

PRR	PRR Title	Stage
1163	RC Services implementation of settlements and billing includes the creation of new Reliability Coordinator and HANA Services charge codes and the termination of one charge code	Recommendation
1164	Emergency PRR: Update the pre-calculation spin non-spin no pay quantity BPM to resolve a document only equation error.	Recommendation

PRR 1163 – RC Services implementation of settlements and billing includes the creation of new Reliability Coordinator and HANA Services charge codes and the termination of one charge code

- Reason for revision
 - RC Services implementation of settlements and billing requires the creation of new RC & HANA Services charges codes, and the termination of one charge code, to allow for the appropriate calculations and generation of invoices and statements by Settlements. All RC Services-related charge codes, including the HANA charge code, appear in statements and invoices separate from CAISO market statements and invoices.
 - BPM for Settlements and Billing has also been further revised to support the implementation.
 - The planned production deployment date is 8/21/2019 with a 7/1/2019 effective date.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - August 20, 2019
- Next step:
 - Post final decision

PRR 1164 – Update the pre-calculation spin non-spin no pay quantity BPM to resolve a document only equation error.

- Reason for revision
 - Through a CIDI inquiry, a market participant noticed inconsistency between the BPM formula and settlements configuration equation for bill determinant FMMMinimumLoadConversionQuantity.
 - The mismatch is due to an unfortunate oversight during configuration changes in this year's Spring release. Settlements will update the BPM to conform with the correct formula as per the configuration templates.
 - This BPM has an effective date of 5/1/2019.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - August 20, 2019
- Next step:
 - Post final decision

Outage Management BPM

PRR	PRR Title	Stage
1168	Emergency PRR: Outage card clarification for resources and must offer obligation clarification for Conditionally Available Resource (CAR) and other resources under Tariff section 40.6.4.1	Recommendation

PRR 1168 – Outage card clarification for resources and must offer obligation clarification for Conditionally Available Resource (CAR) and other resources under Tariff section 40.6.4.1

- Reason for revision
 - Outage card clarification for "Ambient Not Due to Temp" nature of work for resources and must-offer obligations clarifications for conditionally available resources and other resources under Tariff section 40.6.4.1.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expires:
 - August 26, 2019
- Next step:
 - Post final decision

Reliability Requirements BPM

PRR	PRR Title	Stage
1169	Emergency PRR: Must offer obligation clarification for conditionally available resource (CAR) and other resources under Tariff section 40.6.4.1	Recommendation

PRR 1169 – Must Offer Obligation clarification for conditionally available resource (CAR) and other resources under Tariff section 40.6.4.1

- Reason for revision
 - Must offer obligation clarification for conditionally available resource (CAR) and other resources under Tariff section 40.6.4.1
- Recommendation comments:
 - Comments submitted by CDWR on 8/23/19
- Recommendation comment period expires:
 - August 26, 2019
- Next step:
 - Post final decision

Market Operations BPM

PRR	PRR Title	Stage
1162	Language update to the Flexible Ramp histogram calculation	Recommendation
1167	Real-Time Contracts for Ancillary Services or Unloaded Resource Capacity	Recommendation
1170	Emergency PRR: Conditionally Available Resource (CAR) treatment and registration process	Recommendation
1171	Load conformance limiter logic in the fifteen-minute market	Initial

PRR 1162 – Language update to the Flexible Ramp histogram calculation

- Reason for revision
 - This is a language update as the functionality already exist. Updates include removing the Demand Curve Cap from Figure 2 and add it to the Real Time Market Parameter table. Also, updating language to reflect that uncertainty requirements are calculated off the 97.5th percentile and 2.5th percentile of one histogram, rather than separate histograms for FRU and FRD. This is already been in effect.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - August 20, 2019
- Next step:
 - Post final decision

PRR 1167 – Real-Time Contracts for Ancillary Services or Unloaded Resource Capacity

- Reason for revision
 - This revision relates to the ISO’s clarification of tariff section 42.1.5 regarding the ISO’s authority to enter into real-time contracts for unloaded resource capacity to meet Applicable Reliability Criteria. This clarification is consistent with the existing business practices.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - August 20, 2019
- Next step:
 - Post final decision

PRR 1170 – Conditionally Available Resource (CAR) treatment and registration process

- Reason for revision
 - Tariff and BPM clarification regarding the interpretation of ISO tariff section 40.6.4.1 which would allow for a limited must offer obligation for certain types of resources.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expires:
 - August 20, 2019
- Next step:
 - Post final decision

PRR 1171 – Load conformance limiter logic in the fifteen-minute market

- Reason for revision
 - Added a footnote to clarify the Load Conformance Limiter logic in the Fifteen-minute market.
- Initial comments:
 - No comments submitted
- Initial comment period expires:
 - August 13, 2019
- Next step:
 - Post recommendation

Market Instruments BPM

PRR	PRR Title	Stage
1165	Energy storage and distributed energy resources phase 3A	Recommendation
1166	Emergency PRR: Opportunity costs in Scheduling Infrastructure and Business Rules (SIBR) generated cost bids	Recommendation
1173	Energy imbalance market and CAISO balancing authority area's transmission loss clearing results	Initial

PRR 1165 – Energy storage and distributed energy resources phase 3A

- Reason for revision
 - This is due to the Energy Storage & Distributed Energy Resources Phase 3A (ESDER3A) project. Changes include the new dispatchable bid option of 60 minutes and 15 minutes. Effective Fall 2019.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - August 20, 2019
- Next step:
 - Post final decision

PRR 1166 – Opportunity costs in Scheduling Infrastructure and Business Rules (SIBR) generated cost bids

- Reason for revision
 - This change is to include opportunity costs in generated minimum load costs and startup costs in SIBR. This is due to the Commitment Cost Enhancement 3 (CCE3) that was implemented in May 2019. This SIBR rule was implemented on 6/29/19.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - August 20, 2019
- Next step:
 - Post final decision

PRR 1173 – Energy imbalance market and CAISO balancing authority area’s transmission loss clearing results

- Reason for revision
 - EIM Enhancement 2019 project
- Initial comments:
 - No comments submitted
- Initial comment period expires:
 - August 13, 2019
- Next step:
 - Post recommendation

Energy Imbalance Market BPM

PRR	PRR Title	Stage
1172	Energy imbalance market thresholds	Initial

PRR 1172 – Energy imbalance market thresholds

- Reason for revision
 - EIM Enhancement 2019 project
- Initial comments:
 - No comments submitted
- Initial comment period expires:
 - August 13, 2019
- Next step:
 - Post recommendation

Demand Response BPM

PRR	PRR Title	Stage
1174	New Demand Response BPM and language for energy storage and distributed energy resources 3a initiative	Initial

PRR 1174 – New Demand Response BPM and language for energy storage and distributed energy resources 3a initiative

- Reason for revision
 - This is a new Demand Response BPM. The ISO is moving some business processes information from the DR User Guide and the BPM for Metering to the BPM for Demand Response, adding additional information related to process, and language for ESDER 3a initiative. The BPM for Metering will be updated to remove these sections in the near future.
- Initial comments:
 - Comments from PG&E; submitted on 8/13/19
- Initial comment period expires:
 - August 13, 2019
- Next step:
 - Post recommendation

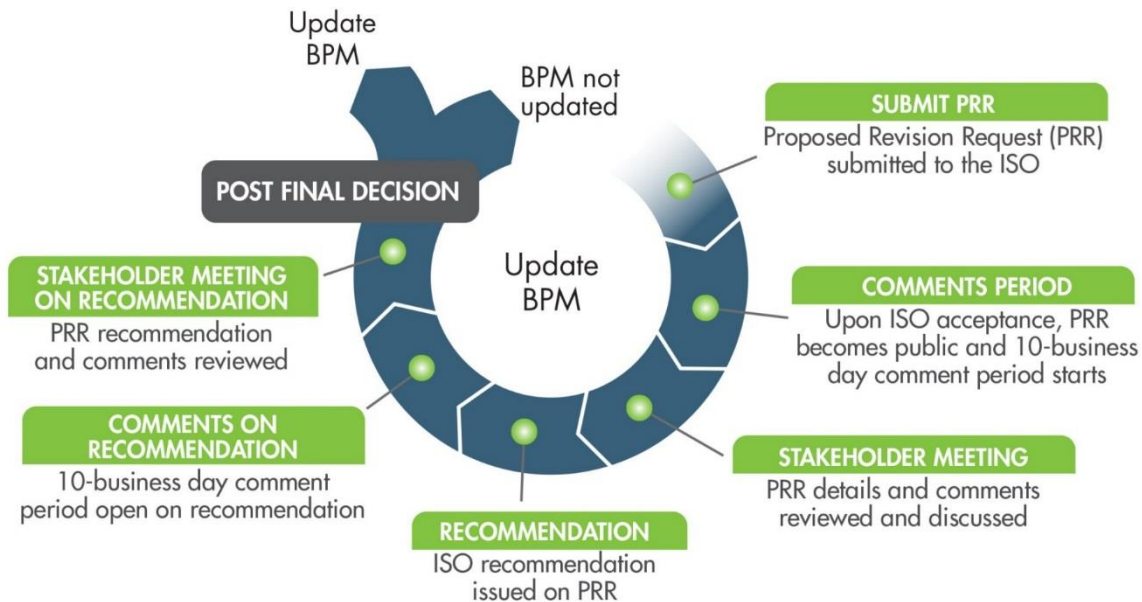
Metering BPM

PRR	PRR Title	Stage
1175	Clarify audit period for scheduling coordinator self-audit and move language from Metering BPM to New Demand Response BPM	Initial

PRR 1175 – Clarify audit period for scheduling coordinator self-audit and move language from Metering BPM to New Demand Response BPM

- Reason for revision
 - Clarify audit period for SC Self-Audit and move language from Metering to New Demand Response BPM
- Initial comments:
 - No comments submitted
- Initial comment period expires:
 - August 13, 2019
- Next step:
 - Post recommendation

Next BPM PRR Review Monthly Meeting: September 24, 2019 @ 11 a.m.



BPM change management
process questions:
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