



BPM Change Management Meeting

Isabella Nicosia

BPM Change Management Process Administrator

BPM_CM@caiso.com

July 30, 2019

Agenda – BPM Change Management Meeting

July 30, 2019

Topic	Presenter
Introduction / Meeting Overview	Isabella Nicosia
Discussion of PRRs in the recommendation stage: Reliability Requirements BPM Market Operations BPM Generator Interconnection and Deliverability Allocation Procedures BPM Generator Interconnection Procedures BPM Generator Management BPM	Kyle Woody Jamal Batakji Phelim Tavares Phelim Tavares Nancy Strouse
Discussion of PRRs in the initial stage: Market Operations BPM Settlements and Billing BPM Market Instruments BPM Outage Management BPM, Reliability Requirements BPM, Market Operations BPM	Jamal Batakji Bonnie Peacock Jamal Batakji Abdulrahman Mohammed-Ali, Kokou Agbassekou
Wrap-Up and Next Steps	Isabella Nicosia

BPM Change Management Process
916-608-1133 BPM_CM@caiso.com

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.*

Reliability Requirements BPM

PRR	PRR Title	Stage
1154	Resource adequacy availability incentive mechanism	Recommendation
1155	References to Tariff 43A and availability assessment hour for 2020	Recommendation

PRR 1154 – Resource adequacy availability incentive mechanism

- Reason for revision
 - Tariff filing
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expires:
 - August 1, 2019
- Next step:
 - Post final decision

PRR 1155 – References to Tariff 43A and availability assessment hour for 2020

- Reason for revision
 - The BPM referenced Tariff section 43 but was changed to reference 43A. 43 is no longer applicable. The availability assessment hour for 2020 were added to the Bidding and Scheduling Obligations section.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - July 17, 2019
- Next step:
 - Post final decision

Market Operations BPM

PRR	PRR Title	Stage
1156	Emergency PRR: Energy imbalance market upward available balancing capacity range penalty price	Recommendation

PRR 1156 – Energy imbalance market upward available balancing capacity range penalty price

- Reason for revision
 - The EIM Upward available balancing capacity range penalty price will be revised from 1100 to 1050 to align it with the power balance constraint penalty price to dispatch upward ABC for EIM entity effectively. Effective date: 5/13/2019
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - July 17, 2019
- Next step:
 - Post final decision

Generator Interconnection and Deliverability Allocation Procedures BPM

PRR	PRR Title	Stage
1157	2019 Interconnection process enhancements- project name publication, financial security modifications	Recommendation

PRR 1157 – 2019 Interconnection process enhancements- project name publication, financial security modifications

- Reason for revision
 - 2019 Interconnection process enhancement
 - Project name publication
 - Elimination of conditions for partial recovery of IFS
 - Posting requirements for PTOs
 - Impact of modifications on IFS
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - July 17, 2019
- Next step:
 - Post final decision

Generator Interconnection Procedures BPM

PRR	PRR Title	Stage
1158	2019 Interconnection process enhancements - project name publication, financial security modifications	Recommendation

PRR 1158 – 2019 Interconnection process enhancements - project name publication, financial security modifications

- Reason for revision
 - 2019 interconnection process enhancements:
 - Project name publication
 - Elimination of conditions for partial recovery of IFS
 - Posting requirements for PTOs
- Recommendation comments
 - No comments submitted
- Recommendation comment period expired:
 - July 17, 2019
- Next step:
 - Post final decision

Generator Management BPM

PRR	PRR Title	Stage
1159	Interconnection procedure enhancements implementation 2018	Recommendation
1160	Meter services agreement for scheduling coordinators	Recommendation
1161	Clerical edits	Recommendation

PRR 1159 – Interconnection procedure enhancements implementation 2018

- Reason for revision
 - Interconnection Process Enhancements (IPE) Implementation 2018
- Recommendation comments:
 - Joint comments from EDF-Renewables, Large-scale Solar Association, and Spower; submitted July 16, 2019.
- Recommendation comment period expired:
 - July 17, 2019
- Next step:
 - Post final decision

PRR 1160 – Meter services agreement for scheduling coordinators

- Reason for revision
 - Provide instruction for Meter Services Agreement for Scheduling Coordinators
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - July 17, 2019
- Next step:
 - Post final decision

PRR 1161 – Clerical edits

- Reason for revision
 - Provide clarification of existing BPM language; grammatical and acronym expansion; capitalization
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - July 17, 2019
- Next step:
 - Post final decision

Market Operations BPM

PRR	PRR Title	Stage
1162	Language update to the Flexible Ramp histogram calculation	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.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - July 17, 2019
- Next step:
 - Post recommendation

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

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.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - July 17, 2019
- Next step:
 - Post recommendation

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.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - July 17, 2019
- Next step:
 - Post recommendation

Market Instruments BPM

PRR	PRR Title	Stage
1165	Energy storage and distributed energy resources phase 3A	Initial
1166	Emergency PRR: Opportunity costs in Scheduling Infrastructure and Business Rules (SIBR) generated cost bids	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.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - July 19, 2019
- Next step:
 - Post recommendation

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.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - July 19, 2019
- Next step:
 - Post recommendation

Market Operations BPM

PRR	PRR Title	Stage
1167	Real-Time Contracts for Ancillary Services or Unloaded Resource Capacity	Initial

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.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - July 19, 2019
- Next step:
 - Post recommendation

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	Initial

Market Operations BPM

PRR	PRR Title	Stage
1170	Emergency PRR: Conditionally Available Resource (CAR) treatment and registration process	Initial

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	Initial

Implementation of Tariff Section 40.6.4.1

- Under section 40.6.4.1 of the Tariff, certain types of resources have a Must Offer Obligation up to the “expected available Energy” or “expected as-available Energy” amount.
- PRRs 1168-1170 implement the processes associated with the limited Must Offer Obligation under the tariff section.

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
- Initial comments:
 - No comments submitted to date
- Initial comment period expires:
 - August 1, 2019
- Next step:
 - Post recommendation

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

- Identifies the resources subject to the limited Must Offer Obligation under tariff section 40.6.4.1:
 - *Hydro Units* (not registered as use-limited)
 - *Pumping Load* (not registered as use-limited)
 - *Non-Dispatchable Resources* (not registered as use-limited)
 - *Conditionally Available Resources (CAR)* – (whether or not registered as Use Limited)

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.
- Initial comments:
 - No comments submitted to date
- Initial comment period expires:
 - August 1, 2019
- Next step:
 - Post recommendation

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

- Provides further clarification to the attributes of a resource qualifying for CAR status:
 - A resource can register both as a Use Limited Resource and a CAR.
 - Describes the Must Offer Obligation of a resource registered as a CAR.
 - Provides resources registered as a CAR the ability to utilize the “Ambient Not Due To Temperature” outage card nature of work.

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.
- Initial comments:
 - No comments submitted to date
- Initial comment period expires:
 - August 1, 2019
- Next step:
 - Post recommendation

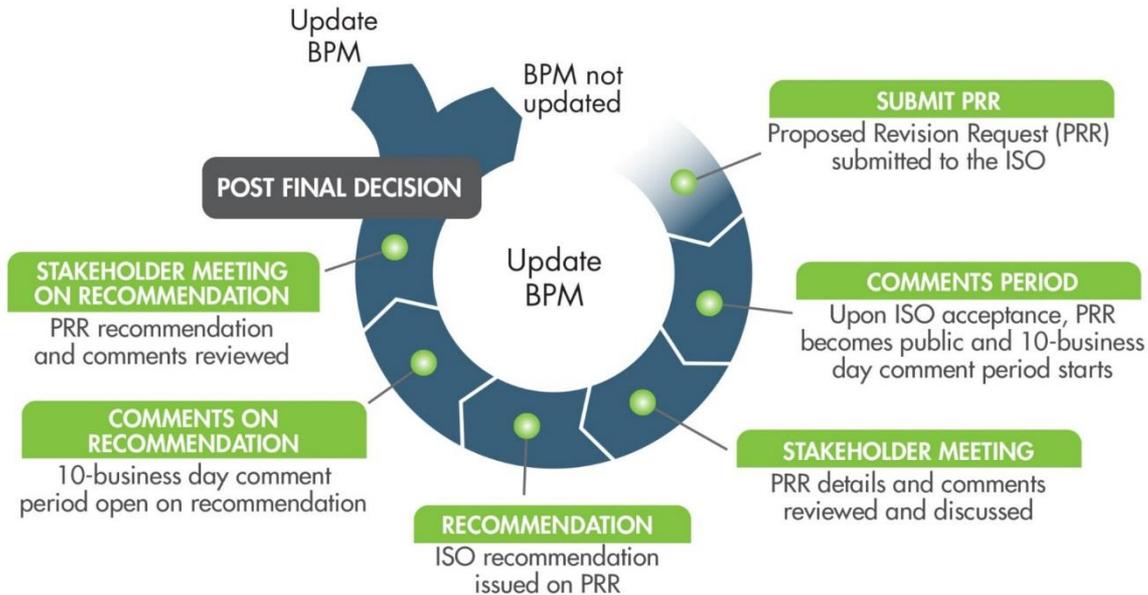
PRR 1168 – Outage card clarification for resources with a Must Offer Obligation under Tariff section 40.6.4.1

- Enables use of the “Ambient Not Due to Temperature” outage nature of work for resources with a Must Offer Obligation under Tariff section 40.6.4.1:
 - Hydro Units without qualifying use limits
 - Pumping Load without qualifying use limits
 - Non-Dispatchable Resources without qualifying use limits
 - CARs (whether or not registered as Use-Limited Resource)
- A resource may utilize the nature of work to notify the ISO that the resource’s expected available energy or expected as-available energy will be below the shown RA Capacity for the unit.

Next Steps on Tariff Section 40.6.4.1

- The ISO anticipates submitting a proposal clarifying the commitment costs enhancements policy direction and outlining tariff changes that will help align the ISO tariff with that direction.
 - These clarifications will include differences between use limited resources, conditionally available resources, and run-of-river hydro resources.
 - They also will discuss RAIM treatment, available outages, and bidding obligations for these resources.
- The ISO will host a stakeholder conference call to discuss the proposal and related changes after the proposal is posted to the ISO website.

Next BPM PRR Review Monthly Meeting: August 27, 2019 @ 11 a.m.



BPM change management
process questions:
Isabella Nicosia
916-608-5829
BPM_CM@caiso.com