BPM Change Management Meeting

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April 28, 2020
# Agenda – BPM Change Management Meeting

**April 28, 2020**

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<td><strong>Introduction / Meeting Overview</strong></td>
<td>Isabella Nicosia</td>
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<td><strong>Discussion of active proposed changes:</strong></td>
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<td>Jim McClain</td>
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<td>Reliability Requirements BPM</td>
<td>Kyle Woody</td>
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<td>Outage Management BPM</td>
<td>Kalyani Abhyankar</td>
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<td>Market Operations BPM</td>
<td>Jamal Batakji</td>
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<td>Market Instruments BPM</td>
<td>Jamal Batakji</td>
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<td>Settlements and Billing BPM</td>
<td>Brenda Corona</td>
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<td>Transmission Planning Process BPM</td>
<td>Gary DeShazo</td>
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<td>Candidate CRR Holder Registration BPM</td>
<td>Rashele Wiltzius</td>
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<td>Direct Telemetry BPM</td>
<td>Priyanka Namburi</td>
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<td>Managing Full Network Model BPM</td>
<td>Vivian Liang</td>
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<td><strong>Wrap-Up and Next Steps</strong></td>
<td>Isabella Nicosia</td>
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BPM Change Management Process

916-608-5829 [BPM_CM@caiso.com](mailto:BPM_CM@caiso.com)
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 though 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.*
### Congestion Revenue Rights BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
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<tbody>
<tr>
<td>1240</td>
<td>Congestion revenue rights clarifications</td>
<td>Initial</td>
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ISO PUBLIC – © 2020 CAISO
• Reason for revision
  – The purpose of this PRR submission is to add additional clarification to sections 7.2.2, 7.3.1, 7.3.2.2.5 and Attachment J
• Initial comments:
  – No comments submitted
• Initial comment period expired:
  – April 14, 2020
• Next step:
  – Post recommendation
## Reliability Requirements BPM

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<tr>
<th>PRR</th>
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</thead>
<tbody>
<tr>
<td>1239</td>
<td>Stabilization of maximum import capability baseline calculation</td>
<td>Initial</td>
</tr>
<tr>
<td>1237</td>
<td>Removal of reference to outage management BPM section 4.5 for 1122 appeals decision</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1239 – Stabilization of maximum import capability baseline calculation

• Reason for revision
  – Changes are required in order to provide an enhanced level of MIC stabilization from one year to the next and the proposal is the final result of the Maximum Import Capability Stabilization and Multi-Year Allocation stakeholder initiative as available in the Revised Straw Proposal posted March 12, 2020.

• Initial comments:
  – Six Cities; submitted 4/14/2020
  – SDG&E; submitted 4/21/2020

• Initial comment period expired:
  – April 14, 2020

• Next step:
  – Post recommendation
PRR 1237 – Removal of reference to outage management BPM section 4.5 for 1122 appeals decision

• Reason for revision
  – This emergency implementation is due to PRR 1122 Appeal Committee Decision.

• Initial comments:
  – NCPA; submitted 3/20/2020

• Initial comment period expired:
  – April 14, 2020

• Next step:
  – Post recommendation
## Outage Management BPM

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<tbody>
<tr>
<td>1236</td>
<td>Removal of section 4.5 as an implementation of 1122 appeals decision</td>
<td>Initial</td>
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PRR 1236 – Removal of section 4.5 as an implementation of 1122 appeals decision

• Reason for revision
  – This emergency implementation is due to PRR 1122 Appeal Committee Decision.

• Initial comments:
  – NCPA; submitted 3/20/2020

• Initial comment period expired:
  – April 14, 2020

• Next step:
  – Post recommendation
## Market Operations BPM

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<tr>
<td>1235</td>
<td>Manual dispatch codes</td>
<td>Initial</td>
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PRR 1235 – Manual dispatch codes

• Reason for revision
  – This is an update to the listing of expected energy types to include some manual dispatch codes. This is already in effect.

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – April 14, 2020

• Next step:
  – Post recommendation
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<td>1230</td>
<td>Additional clarification and timeline for review of Masterfile modifications</td>
<td>Recommendation</td>
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PRR 1230 – Additional clarification and timeline for review of Masterfile modifications

- Reason for revision
  - The proposed modifications to the Master File Procedures section B.1 provide additional clarifications and defined timelines for review of Masterfile changes, including timelines for submission of supporting documentation and ISO response.
  - Effective date is upon completion of the PRR process.

- Recommendation comments:
  - No comments submitted

- Recommendation comment period expired:
  - April 14, 2020

- Next step:
  - Post final decision
## Settlemens and Billing BPM

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<tr>
<td>1234</td>
<td>Updated BPM configuration guides for CC 5701 and CC 5705 to allow for correct settlement of the reliability coordinator minimum charge for entities onboarding outside of April 1 timeline</td>
<td>Recommendation</td>
</tr>
<tr>
<td>1233</td>
<td>Updated configuration guides for CC 1001, CC 1101 and CC 3101 and created new BPM configuration guides for CC 3102 and CC 1102 with regard to settlement and invoicing impacts from Black start system restoration phase 2 initiative</td>
<td>Recommendation</td>
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</table>
PRR 1234 – Updated BPM configuration guides for CC 5701 and CC 5705 to allow for correct settlement of the reliability coordinator minimum charge for entities onboarding outside of April 1 timeline

• Reason for revision
  – Configuration changes allow for the correct settlement of the reliability coordinator (RC) minimum charge to no-load Transmission Operator customers that may onboard outside of the April 1 timeline. These changes include the ability to charge via a re-calculation, as needed in the initial onboarding year, the pro-rata charges of the RC minimum charge.
  – Clarified BPM for Settlements and Billing and BPM Configuration guide for CC 5702 with regard to RC Services invoice payment due date and late payment assessment.
  – The planned production deployment date is 4/29/2020 with a 1/1/2020 effective date.

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – April 14, 2020

• Next step:
  – Post final decision
PRR 1233 – Updated configuration guides for CC 1001, CC 1101 and CC 3101 and created new BPM configuration guides for CC 3102 and CC 1102 with regard to settlement and invoicing impacts from Black start system restoration phase 2 initiative

• Reason for revision
  – Configuration changes for the settlement and invoicing impacts in black start system restoration phase 2 initiative, the CAISO is changing its current practice regarding procurement and compensation for black start services. Therefore, CC 3102 will be derived based on black start capability payments and contractual cost recovery payments to generator owners and CAISO allocate such payments to participating transmission owners in CC 1102 on the black start capability invoice. Also, CC 1001 will also be updated to accommodate settlement of ‘BLACK START’ exceptional dispatch types.
  – The two charge codes that will be terminated are CC 1101 black start capability allocation and CC 3101 black start capability settlement. The CC 1001 black start energy payment was updated while CC 3102 black start capability settlement and CC 1102 black start capability allocation were newly created.
  – BPM for Settlements and Billing has also been further revised to support the implementation for black start capability invoice.
  – The planned production deployment date is 4/29/2020 with a 5/1/2020 effective date

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – April 14, 2020

• Next step:
  – Post final decision
## Transmission Planning Process BPM

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<td>1232</td>
<td>Consolidation of interregional transmission coordination information into a single chapter</td>
<td>Recommendation</td>
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PRR 1232 – Consolidation of interregional transmission coordination information into a single chapter

• Reason for revision
  – Current version 19 of the Transmission Planning Process BPM has information and requirements associated with Order 1000 interregional transmission coordination in several sections associated with the Phase 1 and Phase 2 transmission planning process. Version 20 consolidates interregional transmission coordination BPM information and requirements into a single chapter.

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – April 14, 2020

• Next step:
  – Post final decision
# Candidate CRR Holder Registration BPM

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<td>1231</td>
<td>Update to congestion revenue rights holder application and corrected formatting</td>
<td>Recommendation</td>
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PRR 1231 – Update to congestion revenue rights holder application and corrected formatting

• Reason for revision
  – Added proposed commencement date to CRR Holder Application form per tariff requirement. Also updated all URL links in document and corrected outline formatting and table of contents.

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – April 14, 2020

• Next step:
  – Post final decision
Direct Telemetry BPM

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<td>1229</td>
<td>Removing dispersive technologies</td>
<td>Recommendation</td>
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PRR 1229 – Removing dispersive technologies

• Reason for revision
  – Dispersive is no longer an CAISO telemetry transport option.
• Recommendation comments:
  – No comments submitted
• Recommendation comment period expired:
  – April 14, 2020
• Next step:
  – Post final decision
## Managing Full Network Model BPM

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<tr>
<td>1228</td>
<td>Aliso Canyon tariff provisions – FERC Order ER20-273</td>
<td>Recommendation</td>
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Reason for revision
- This revision includes the changes in Section 4.2.7.1.2 to align with tariff revisions to make Aliso Canyon provisions permanent per FERC Order ER20-273.
- The effective date was December 31, 2019.

Recommendation comments:
- No comments submitted

Recommendation comment period expired:
- March 14, 2020

Next step:
- Post final decision
Next BPM PRR Review Monthly Meeting:
May 25, 2020 @ 11 a.m.

BPM change management process questions:
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