



# BPM Change Management Meeting

Ryan Ayer

BPM Change Management Process Administrator

[BPM\\_CM@caiso.com](mailto:BPM_CM@caiso.com)

April 23, 2024

# Housekeeping reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.
- Meeting is structured to stimulate honest dialogue and engage different perspectives.
- Please keep comments professional and respectful.

# Instructions for raising your hand to ask a question

- If you are connected to audio through your computer or used the “call me” option, select the raise hand icon  above the chat window located on bottom right corner of the screen. **Note:** #2 only works if you dialed into the meeting.
- Please remember to state your name and affiliation before making your comment.
- If you need technical assistance during the meeting, please send a chat to the event producer.

# Agenda – BPM Change Management Meeting

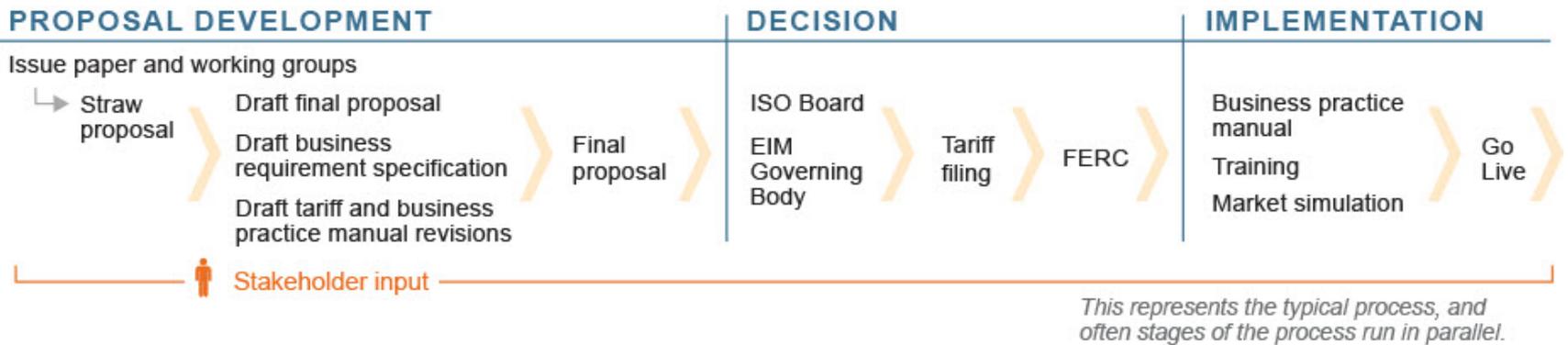
## April 23, 2024

Topic	Presenter
Introduction / Meeting Overview	Ryan Ayer
Credit Management and Market Clearing	Christina Billing
Rules of Conduct Administration BPM	Angelica Stahl
Market Instruments	Michael Martin
Market Operations	Michael Martin
Settlements and Billing	Massih Ahmadi
Wrap-Up and Next Steps	Ryan Ayer

BPM Change Management Process

[BPM\\_CM@caiso.com](mailto: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.*

# Credit Management and Market Clearing

PRR	PRR Title	Stage
1554	Minor revision to Section 6.2 Estimated Aggregate Liability Components	Recommendation

# PRR 1554 - Minor revision to Section 6.2 Estimated Aggregate Liability Components

- Reason for revision
  - Language clean up to be in alignment with updated settlements timeline
  - Initial comments: None
- Recommendation comment period expired: April 16, 2024
- Next step: Post Final Decision

# Rules of Conduct Administration

PRR	PRR Title	Stage
1555	Rules of Conduct Enhancements - Phase 1	Recommendation

# PRR 1555 – Rules of Conduct Enhancements – Phase 1

- Reason for revision
  - BPM changes are in support of Tariff changes related to Rules of Conduct Enhancement (ROCE) Phase 1 effort.
  - Recommendation comments: None
- Recommendation comment period expired: April 16, 2024
- Next step: Post Final Decision

# Market Instruments

PRR	PRR Title	Stage
1558	New OASIS report labeled ATC for PWT Requests	Initial

# PRR 1558 – New OASIS report labeled ATC for PWT Requests

- Reason for revision
  - Describes a new OASIS report labeled ATC for PWT Requests which displays the Available Transfer Capacity for Priority Wheel Through (PWT) Requests as part of the TSMSP project.
  - Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

# Market Operations

PRR	PRR Title	Stage
1556	Clarification on hybrid dynamic limits submission requirements	Recommendation
1557	Two minor updates related to multistage generators functionality	Recommendation
1567	Clarification on hybrid dynamic limits submission requirements	Initial
1568	Clarifying tagging requirements in support of resource sufficiency evaluation Phase 2 Project	Initial

# PRR 1556 – Clarification on hybrid dynamic limits submission requirements

- Reason for revision
  - BPM updates are being made to clarify the requirement for the submission of hybrid dynamic limits for resources that have recently began participating as hybrid resources.
  - Recommendation comments: None
- Recommendation comment period expired: April 16, 2024
- Next step: Post Final Decision

# PRR 1557 – Two minor updates related to multistage generators functionality

- Reason for revision
  - Added a clarification in the Use-Limited Resource section to specify that IFM/RTM cannot handle configuration-level run hour limitations and only plant-level run hour limitations. Secondly, should an MSG resource's initial condition start in HE01 in a configuration that cannot be shut down or transitioned and the MSG resource has an outage for the Day-Ahead Market TD in HE01, the ISO operator may set the initial conditions of the MSG resource or configuration to off-line..
  - Recommendation comments: None
- Recommendation comment period expired: April 16, 2024
- Next step: Post Final Decision

# PRR 1567 – Updates to constraints related to the impact of ancillary service awards on state of charge on storage resources

- Reason for revision
  - The intent is to better capture the potential impact of ancillary service awards on the state charge within the market dispatch as well as to increase the feasibility of ancillary service market awards. This also corrects a BPM posting error in Section 4.2.9
  - Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

# PRR 1568 – Clarifying tagging requirements in support of resource sufficiency evaluation Phase 2 Project

- Reason for revision
  - This PRR clarifies updates to the tagging requirement for G-FP tags and requirement to add the Market Priority type. This also adjusts the timing of the RUC Auto-Adjustment.  
Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

# Settlements and Billing

PRR	PRR Title	Stage
1559	Updating BPM existing transmission contract pre-calc transmission ownership right converted rights quantity business rule to support transmission exchange agreement initiative.	Initial
1560	Updated BPM configuration guide for pre-calc configuration guide pre-calc wheel export quantity to accommodate transmission service and market scheduling priorities project phase 2.	Initial
1561	Updated BPM Configuration guide real time net amount pre-calculation to accommodate market enhancement to ancillary services state of charge constraint.	Initial
1562	Configuration updates to the real time energy quantity pre-calc to add new WEIM pumped storage interval resource base schedule variable as an input to the settlement interval resource base schedule.	Initial
1563	Created and updated multiple BPM configuration guides to exclude base schedule energy transfer system resource from being considered in assistance energy transfer calculations, and flags for corrections to resource sufficiency evaluations Pass/Fail scenar.	Initial
1564	Updated real time congestion pre-calc 5.8 to accommodate a fix to show nodal congestion calculations.	Initial
1565	Update configuration guide for resource adequacy availability incentive mechanism pre-calc to resolve data overlap for the same resource on acquired rights and run of river resource adequacy availability incentive mechanism exemption.	Initial
1566	Updating multiple BPMs for correct settlement of hybrid tie generator resources.	Initial

# PRR 1559 – Updating BPM existing transmission contract pre-calc transmission ownership right converted rights quantity business rule to support transmission exchange agreement initiative

- Reason for revision
  - An existing Transmission Exchange Agreement (TEA) among WAPA, PG&E, and CAISO is expiring and is being extended. A feature of the original agreement is being implemented to allow WAPA to sell a portion of their TEA contracts rights to other buyers. The initiative and corresponding implementation changes is meant to fulfill that obligation.
  - The BPM documentation change includes a business rule specific to the TEA contracts which describes how buyers of portion of WAPA's TEA contract rights will be settled. This is consistent with WAPA's existing rights.  
Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

## PRR 1560 – Updated BPM configuration guide for pre-calc configuration guide pre-calc wheel export quantity to accommodate transmission service and market scheduling priorities project phase 2

- Reason for revision
  - The TSMSP2 Project triggered the change. The change is required to ensure that Wheel Through schedules have the same priority to Available Transmission Capability (ATC) at an intertie as Load. Updates to configuration ensure that the Original Wheeling Priority SC should be charged WAC for the Maximum of Wheeling Priority Quantity and scheduled export. While the purchaser of the resale Wheeling Priority Quantity should be assessed WAC on the maximum of schedule export less purchased Wheeling priority MW and zero. CG PC Wheel Export Quantity is impacted. The effective date is 6/1/2024 and the anticipated implementation date is 5/29/2024.
  - The tariff requires that Original Wheeling Priority transaction and the Resale transaction become effective in the market 6/1/2024. For that reason, both are reflected in the updated configuration effective 6/1/2024. However, Settlements is unable to map and settle the Resale component until some point in the future. The resale values for trade dates prior to the implementation date need to be stored somewhere and correction payloads need to be developed to publish these values in the future for retroactive settlement. The implementation timeline for Resale mapping is currently a work-in-progress.
  - The Market Sim for TSMSP2 and the Summer 2024 Release will not include the Resale component. Once the Resale functionality is available, we will schedule an additional Market simulation which allows participants to buy/sell PWT, test the updated mapping of the settlement resale bill determinant, and verify the settlement.
  - Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

# PRR 1561 – Updated BPM Configuration guide real time net amount pre-calculation to accommodate market enhancement to ancillary services state of charge constraint.

- Reason for revision
  - Upstream systems are making an enhancement to indicate when the (potentially uneconomical) energy schedule of the storage resource in the financially-binding interval might be driven (in part) by binding AS SOC constraints in any advisory interval due to AS obligations. To accommodate this change, RTM Net Amount Pre-Calc 5.37.1 and RTM Net Amount Pre-Calc 5.38.1 were updated to allow corrections to the AS SOC 5 minute and 15 minute flags, as well as removing the logic to evaluate if an Ancillary Service award exists in the same interval as an AS SOC Constraint Flag, as this logic was moved upstream.
  - This is a retroactive change, with production deployment expected 5/27/2024 and an effective date of 7/1/2023.  
Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

## PRR 1562 – Configuration updates to the real time energy quantity pre-calc to add new WEIM pumped storage interval resource base schedule variable as an input to the settlement interval resource base schedule.

- Reason for revision
  - A participant dispute uncovered an issue in which pumped storage hydro resources located in the WEIM balancing authority area were being incorrectly designated as generating resources during intervals in which those resources were pumping as loads, as indicated by those resources having a negative base schedule. The configuration updates will ensure that a new input reflects pumped storage hydro resources in the WEIM balancing authority area as load resources when those resources are in pumping mode.
  - The BPM configuration guide RT Energy Quantity PC v.5.25 has been updated to reflect a revised formula for the Settlement Interval Resource Base Schedule charge type. The updated formula section also includes a new formula to define the new input: WEIM Pumped Storage Interval Resource Base Schedule.
  - The upstream changes are to be deployed around 5/1/2024. The effective date of those changes will align to the BPM effective date of 3/1/2023.  
Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

## PRR 1563 – Created and updated multiple BPM configuration guides to exclude base schedule energy transfer system resource from being considered in assistance energy transfer calculations, and flags for corrections to resource sufficiency evaluations Pass/Fail scenario

- Reason for revision
  - Due to disputes received for RSE corrections and BASE ETSR inclusion in AET Surcharge calculations, the CAISO reviewed and after investigation approved the disputes. The changes required are the exclusion of BASE ETSRs from consideration in the Real Time Assistance Energy Charge Codes, as well as new flags for passing or failing the RSE tests that allow for corrections. To support these changes, 6476 Real Time Assistance Energy Transfer Surcharge 5.1 and 6479 Real Time Assistance Energy Transfer Allocation 5.1 were modified with the above requirements.
  - This is a retroactive change, with production deployment expected 5/27/2024 and an effective date of 7/1/2023.  
Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

# PRR 1564 – Updated real time congestion pre-calc 5.8 to accommodate a fix to show nodal congestion calculations.

- Reason for revision
  - In an effort to enhance transparency of settlements calculations, a step is being added to show nodal congestion calculations prior to showing Balancing Authority Area congestion amounts. The changes are included in Real Time Congestion PC 5.8.
  - This is a prospective change, with production deployment expected 5/27/2024 and an effective date of 6/1/2024.  
Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

# PRR 1565 – Update configuration guide for resource adequacy availability incentive mechanism pre-calc to resolve data overlap for the same resource on acquired rights and run of river resource adequacy availability incentive mechanism exemption

- Reason for revision
  - CAISO encountered processing delays for a resource having both acquired rights and run of river exemption particularly for overlapping trade dates. This did not and does not result in any financial impact just processing issue. In order to avoid this issue from happening again, the subject updated configuration explicitly separates acquired rights flag from run of river flag data, and reflect the separation in the formulation. Both acquired rights and run of river eligible resources will continue to get exemption – collectively - from RAIM assessment.
  - There should not be any financial impact. The successor charge code CC 8830 (Monthly RAIM Settlement) and CC 8831 (Monthly RAIM Allocation) will not be impacted.
  - The prospective fix changes are to be deployed around 5/29/2024 and settle charge codes for Trade Dates starting 6/1/2024.  
Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

# PRR 1566 – Updating multiple BPMs for correct settlement of hybrid tie generator resources

- Reason for revision
  - Dispute research tied to Uninstructed Imbalance Energy (UIE) Settlement is triggering this change. It was found that Hybrid TG resource attribute combination was being incorrectly filtered, leading to incorrect settlement for UIE. Similar filters outside of UIE require updates to filter Hybrid TG resources correctly.
  - This is a retroactive change, with production deployment expected 5/27/2024 and an effective date of 7/1/2023.  
Initial comments: None
- Initial comment period expired: April 16, 2024
- Next step: Post Recommendation

# Next BPM PRR Review Monthly Meeting: May 21, 2024 @ 11:00 a.m. PT



BPM change management  
process questions:

Nicole Hines

[BPM\\_CM@caiso.com](mailto:BPM_CM@caiso.com)