



BPM Change Management Meeting

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Agenda – BPM Change Management Meeting

April 25, 2023

Topic	Presenter
Introduction / Meeting Overview	Christina Costa
<p>Discussion of active proposed changes:</p> <ul style="list-style-type: none"> Generator Interconnection and Deliverability Allocation Procedures Congestion Revenue Rights Reliability Requirements Settlements and Billing Outage Management Market Instruments Market Operations Energy Imbalance Market 	<ul style="list-style-type: none"> Daune Wilson Mengjia Xiao Melanie Schimschal Massih Ahmadi Abdul Mohammed-Ali Michael Martin Michael Martin Michael Martin
Wrap-Up and Next Steps	Christina Costa

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.*

Generator Interconnection and Deliverability Allocation Procedures BPM

PRR	PRR Title	Stage
1486	Accepting interconnection requests seeking to interconnect to new transmission planning projects	Recommendation
1489	Error Corrections	Recommendation

PRR 1486: Accepting interconnection requests seeking to interconnect to new transmission planning projects

- Reason for revision
 - The added language provides clarification for interconnection customers who are considering interconnecting to newly approved or yet to be approved transmission projects from the CAISO transmission planning process.
- Initial Comments: San Diego Gas & Electric Company
- Recommendation Comments: None
- Recommendation comment period expired: April 18, 2023
- Next step: Post Final Decision
- **Note:** This emergency PRR was made effective February 9, 2023 and is visible in the BPM Library

PRR 1489: Error corrections

- Reason for revision
 - Modifications are being made to correct the following errors:
 - 1) site exclusivity public land missing phrase
 - 2) study deposit refund maximum alignment with CAISO tariff and
 - 3) remove least squares calculation that no longer applies
- Recommendation Comments: None
- Recommendation comment period expired: April 18, 2023
- Next step: Post Final Decision

Congestion Revenue Rights BPM

PRR	PRR Title	Stage
1487	Congestion revenue rights BPM updates on full network model and credit holding requirements	Recommendation

PRR 1487: Congestion revenue rights BPM updates on full network model and credit holding requirements

- Reason for revision
 1. Add numerical examples for credit holding requirement calculation in Attachment H.
 2. Update the description of $D_{i,m,p}$ in the credit holding requirement formula for clarity.
 3. Format Attachment H.
 4. Format Attachment K table.
 5. Remove and update language on 30 day advance publication of allowable Source and Sink list.
 6. Remove language on Point-to-Point priority weights in the objective function calculation.
- Recommendation Comments: None
- Recommendation comment period expired: April 18, 2023
- Next step: Post Final Decision

Reliability Requirements BPM

PRR	PRR Title	Stage
1490	Clarification for pumping load bidding rule	Initial

PRR 1490: Clarification for pumping load bidding rule

- Reason for revision
 - Minor update to align language in the tariff to the BPM in regards to bidding requirements for pumping load. Previously, section 7.1.1 in the BPM created one standard bidding rule for use limited resources. However, for pumping load, tariff section 40.6.4.2 sets no RUC bidding requirement for pumping load, use limited or not. This revision will apply the same bidding requirements for pumping load whether it is use limited, or not.
- Initial Comments: California Department of Water Resources
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

Settlements and Billing BPM

PRR	PRR Title	Stage
1491	Updated BPM configuration guide for pre-calculation real time market net amount v5.37 to accommodate ancillary service state of charge constraint initiative	Initial
1492	Created two new charge codes in accordance with the resource sufficiency evaluation enhancement phase 2 initiative	Initial
1493	Updated BPM configuration guide for charge group pre-calculation system resource deemed delivered energy quantity to accommodate logical meter calculator scenarios where the electronic tag is curtailed mid-hour	Initial
1494	Updated charge group pre-calculation metered subsystems deviation penalty quantity to accurately account for resources with spinning/non-spinning capacity dispatches outside contingency intervals	Initial
1495	Updated multiple BPM configuration guides to accommodate market services production allocating one sided charge or payment neutrality adjustments to measured demand in charge code 8989 and charge code 8999 while also achieving revenue neutrality	Initial
1499	Updated BPM configuration guide for charge code 701 forecasting service fee 5.6 to accommodate hybrid 2C initiative	Initial

PRR 1491: Updated BPM configuration guide for pre-calculation real time market net amount v5.37 to accommodate ancillary service state of charge constraint initiative

- Reason for revision
 - Settlement configuration changes to support Ancillary Services State of Charge Constraint initiative implementing new inputs to properly evaluate and compensate energy storage resources in Bid Cost Recovery settlement. The changes exclude resources from Real Time Market (RTM) Bid Cost Shortfall in intervals indicated by new flags from the Ancillary Service State of Charge Constraint.
 - The planned production deployment date is 6/01/2023 with a retroactive effective date of 9/20/2022.
- Initial Comments: None
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

PRR 1492: Created two new charge codes in accordance with the resource sufficiency evaluation enhancement phase 2 initiative

- Reason for revision
 - The purpose of this initiative is to continue to enhance the accuracy of the Western Energy Imbalance Market (WEIM) resource sufficiency evaluation.
 - This initiative addresses remaining items from the Resource Sufficiency Evaluation Enhancements (RSEE) Phase 1 initiative as well as elements deferred from the Phase 1 policy development process. This scope is informed by analysis the CAISO performed on different aspects of the WEIM Resource Sufficiency Evaluation (RSE) that were not addressed under the RSEE Phase 1 policy development.
 - The settlements related scope for this initiative is as follows:
 - Facilitate assistance energy transfer between WEIM Balancing Authority Areas (BAA) into the WEIM BAAs that failed RSE upward test:
 - Creation of new charge code for the Assistance Energy Transfer Surcharge
 - Creation of new allocation charge code for the Assistance Energy Transfer Allocation.
 - The effective Trade Date for this change is 6/1/2023.
- Initial Comments: None
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

PRR 1493: Updated BPM configuration guide for charge group pre-calculation system resource deemed delivered energy quantity to accommodate logical meter calculator scenarios where the electronic tag is curtailed mid-hour

- Reason for revision
 - The current Logical Meter Calculator (LMC) in System Resource Deemed Delivered Pre-Calculation (PC) is not capturing scenarios when the E-tag is curtailed mid-hour, but the Pi-Tag is non zero. In scenarios where the e-tag is curtailed mid-hour we want to zero out the PI interval values (because energy flow on the e-tag did not occur). Otherwise, it results in the derivation an inaccurate denominator in the allocation factor equation. System Resource Deemed Delivered PC will utilize the existing Checked Out Interchange Shadow Indicator to determine if there is flow on the e-tag which will be signified by the Shadow indicator interval value being set to 1. A null or zero interval value signifies that there was no flow on the tag and as such will result in the PI interval value being zeroed out and as a result no LMC shaping occurs against it. System Resource Deemed Delivered PC is impacted.
 - The effective trade date of the change is 6/1/2023 and the anticipated implementation date is 5/31/2023.
- Initial Comments: None
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

PRR 1494: Updated charge group pre-calculation metered subsystems deviation penalty quantity to accurately account for resources with spinning/non-spinning capacity dispatches outside contingency intervals

- Reason for revision
 - Market Participant created a dispute where they identified an issue with their load following resources getting SPIN dispatches outside contingency intervals. During incidences like these, the energy quantity associated with the SPIN/NSPIN dispatch is not being accounted for when calculating their ISO dispatched energy.
- Initial Comments: None
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

PRR 1495: Updated multiple BPM configuration guides to accommodate market services production allocating one sided charge or payment neutrality adjustments to measured demand in charge code 8989 and charge code 8999 while also achieving revenue neutrality

- Reason for revision
 - MSP determined that CC 8989 and CC 8999 won't perform the allocation method the two charge codes are designed for. MSP is unable to allocate one sided charge or payment neutrality adjustments to measured demand in CC 8989 and CC 8999 while also achieving revenue neutrality.
 - Both the ICG prices derived within 8989 and the single price formula derived in 8999 design templates failed to break up each of the single prices in the ICG into two formulas. All the ICG prices featured internal summation which would have required splitting the price into two formulas on the DT. Each ICG formula will be broken into two formulas and each single formula on the DT will be split into two formulas. This will ensure revenue neutrality. CG CC 8999 Monthly Neutrality Adjustment and
 - CG CC 8989 Daily Neutrality Adjustment are impacted. The effective trade date of the change is 6/01/2023 and the anticipated implementation date is 5/31/2023.
- Initial Comments: None
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

PRR 1499: Updated BPM configuration guide for charge code 701 forecasting service fee 5.6 to accommodate hybrid 2C initiative

- Reason for revision
 - As part of Hybrid 2C Initiative, Hybrid Tie Generators will be able to have Forecast Fee Settlement. A change to 701 Forecasting Service Fee 5.6 was required to allow shaping of meter based on Tie Generator needs.
 - This is a prospective change with expected production deployment 5/31/2023 and effective date 6/1/2023.
- Initial Comments: None
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

Outage Management BPM

PRR	PRR Title	Stage
1485	Strategic reliability reserve	Recommendation

PRR 1485: Strategic reliability reserve

- Reason for revision
 - Minor modification to the use of the “Environmental Limitation” nature of work definition to allow the resources under the Strategic Reserve program to use it.
- Initial Comments: Southern California Edison
- Recommendation Comments: Calpine; Gridwell Consulting for Western Power Trading Forum
- Recommendation comment period expired: April 18, 2023
- Next step: Post Final Decision

Market Instruments BPM

PRR	PRR Title	Stage
1496	Updating fuel region prices	Initial
1500	Open access same time information system and CAISO market results interface report changes for resource sufficiency evaluation enhancements phase 2 project	Initial

PRR 1496: Updating fuel region prices

- Reason for revision
 - Western Power Trading Forum (WPTF) submits this PRR to Section C.3.2 of the CAISO's BPM for Market Instruments. The intent of this BPM change is to ensure any changes to fuel regions used in the CAISO's gas price calculations are updated in a timely manner such that they are able to be reflected in the market within a reasonable timeframe.
- Initial Comments: None
- Initial comment period expired: April 18, 2023
- Next step: Remaining in Initial Comments stage for further discussion

PRR 1500: Open access same time information system and CAISO market results interface report changes for resource sufficiency evaluation enhancements phase 2 project

- Reason for revision
 - Outlines Open Access Same Time Information System (OASIS) and CAISO Market Results Interface (CMRI) report changes in the Resource Sufficiency Evaluation Enhancements (RSEE) Ph2 project including moving two reports from CMRI to OASIS, a new Assistance Transfer report and a Market Bid Caps report.
- Initial Comments: Six Cities – on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, California
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

Market Operations BPM

PRR	PRR Title	Stage
1497	Interchange tagging changes related to resource sufficiency evaluation enhancement phase 2 project	Initial

PRR 1497: Interchange tagging changes related to resource sufficiency evaluation enhancement phase 2 project

- Reason for revision
 - As a result of the Resource Sufficiency Evaluation Enhancements (RSEE) Project Phase 2, several changes to interchange tagging related to lower market priority are required.
- Initial Comments: California Public Utilities Commission (CPUC); Bonneville Power Administration (BPA); Six Cities – on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, California
- Initial comment period expired: April 18, 2023
- Next step: Post Recommendation

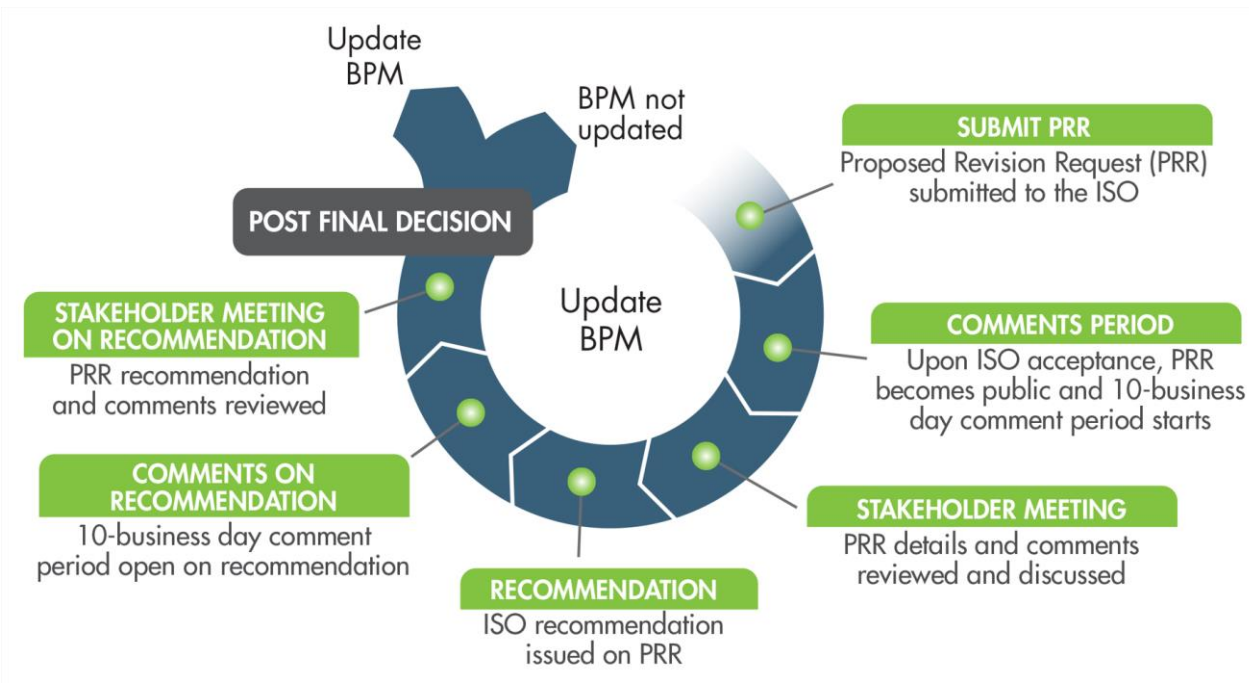
Energy Imbalance Market BPM

PRR	PRR Title	Stage
1498	Assistance energy transfer	Initial

PRR 1498: Assistance energy transfer

- Reason for revision
 - Added section introducing the Assistance Energy Transfer (AET) concept as part of the Resource Sufficiency Evaluation Enhancement (RSEE) Phase 2 Project. Assistance Energy Transfers allow WEIM entities to provide reliability benefits to balancing authority areas (BAAs) deficient in capacity or flexibility. BAAs that have voluntarily opted into receiving assistance energy transfers will also be subject to an ex-post surcharge (the “EIM Assistance Energy Transfer Surcharge”) when they fail the RSE.
- Initial Comments: San Diego Gas & Electric Company (SDG&E); California Public Utilities Commission (CPUC); Pacific Gas & Electric Company (PG&E); Six Cities – on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, California
- Initial comment period expired: April 18, 2023
- Next step: Remaining in Initial Comments stage for further discussion

Next BPM PRR Review Monthly Meeting: May 23, 2023 @ 11 a.m.



BPM change management
process questions:
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