BPM Change Management Meeting

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August 24, 2021

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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.
New 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
August 24, 2021

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<td>Settlements and Billing BPM</td>
<td>Brenda Corona</td>
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<td>Reliability Requirements BPM</td>
<td>Melanie Bogen</td>
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<td>Market Operations BPM</td>
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<td>Nicole Hines</td>
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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.*

PROPOSAL DEVELOPMENT

|-------------|----------------|------------------------------------------|--------------|----------------|-------|-----|----------------|---------------|-----|-----------------------------|------------------|--------|

This represents the typical process, and often stages of the process run in parallel.
## Settlements and Billing BPM

<table>
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<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
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<tr>
<td>1366</td>
<td>Updated charge code 6456 intertie deviation settlement to exempt hour ahead scheduling process market disruption intervals from intertie deviation settlement penalty assessment</td>
<td>Initial</td>
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PRR 1366 – Updated charge code 6456 intertie deviation settlement to exempt hour ahead scheduling process market disruption intervals from intertie deviation settlement penalty assessment

- Reason for revision
  - Through the dispute process, an issue was identified where during HASP market disruption intervals, the IDS charge code was calculating penalties based on 0 HASP schedules. The 0 values does not accurately represent the actual instructions followed by market participants. The solution is to exempt HASP market disruption intervals from IDS penalty assessment.
  - The effective date of the changes is 2/1/2021 and the anticipated implementation date is 8/19/21.

- Initial comments:
  - No comments submitted to date

- Initial comment period expires:
  - September 15, 2021

- Next step:
  - Initial comments due
## Reliability Requirements BPM

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<tr>
<th>PRR</th>
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<tr>
<td>1364</td>
<td>Correct bidding requirements for non-generating resource (non-regulation energy management)</td>
<td>Recommendation</td>
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<tr>
<td>1361</td>
<td>Resource adequacy enhancement project phase 1 transition process</td>
<td>Recommendation</td>
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PRR 1364 – Correct bidding requirements for non-generating resource (non-regulation energy management)

• Reason for revision
  – The RTM bidding requirements for Non-Generator Resources (Non-REM) must be updated to match the description in the tariff.
• Recommendation comments:
  – PG&E; submitted 8/12/21
• Recommendation comment period expired:
  – August 17, 2021
• Next step:
  – Post final decision
PRR 1361 – Resource adequacy enhancement project phase 1 transition process

• Reason for revision
  – Clarifying the transition process relating to tariff section 9.3.1.3.9.
  – Effective date is 6/2/21
• Recommendation comments:
  – No comments submitted
• Recommendation comment period expired:
  – August 17, 2021
• Next step:
  – Post final decision
## Market Operations BPM

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<tr>
<td>1363</td>
<td>Trajectory between real-time dispatch intervals</td>
<td>Recommendation</td>
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<tr>
<td>1362</td>
<td>FERC Order 831 Phase 2 threshold logic</td>
<td>Recommendation</td>
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<tr>
<td>1282</td>
<td>Scheduling of export resources in real time market</td>
<td>Recommendation</td>
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• Reason for revision
  – Based on additional feedback from stakeholders, the CAISO is proposing additional revisions to section 7.2.3.6. of the Market Operations BPM – Trajectory data. The revisions reflect the CAISO’s expectation that resources will follow their dispatch operating point between dispatch operating targets.

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – August 17, 2021

• Next step:
  – Post final decision
• Reason for revision
  – This is due to FERC 831 phase 2 initiative, related to Market threshold logic.
  – Effective date is June 15, 2021.
• Recommendation comments:
  – No comments submitted
• Recommendation comment period expired:
  – August 17, 2021
• Next step:
  – Post final decision
PRR 1282 – Scheduling of export resources in real time market

• Reason for revision
  – These changes are to improve the scheduling of resources in the Residual Unit Commitment (RUC) and real-time process based on expected priorities for exports.
  – This PRR went into effect on September 5, 2020.

• Recommendation comments:
  – APS; submitted 8/16/21

• Recommendation comment period expired:
  – August 17, 2021

• Next step:
  – Post final decision
Next BPM PRR Review Monthly Meeting:
September 28, 2021 @ 11 a.m.

BPM change management process questions:
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