



BPM Change Management Meeting

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August 22, 2023

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- Please remember to state your name and affiliation before making your comment.
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Agenda – BPM Change Management Meeting August 22, 2023

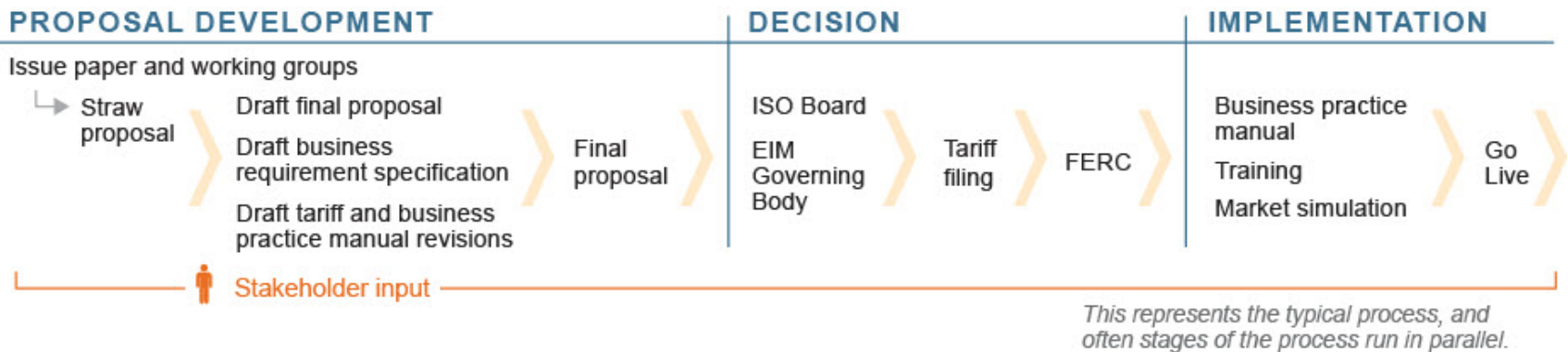
Topic	Presenter
Introduction / Meeting Overview	Nicole Hines
Discussion of active proposed changes:	
Scheduling Coordinator Certification and Termination	Nicole Hines
Metering	Priyanka Namburi
Managing Full Network Model	Vivian Liang
Reliability Requirements	Melanie Schimschal
Market Instruments	Michael Rugh, Jacob Fox
Market Operations	Michael Martin
Congestion Revenue Rights	Mengjia Xiao
Settlements and Billing	Massih Ahmadi
Energy Imbalance Market	Michael Martin
Wrap-Up and Next Steps	Nicole Hines

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.*

Scheduling Coordinator Certification and Termination BPM

PRR	PRR Title	Stage
1515	Adding additional clarifying information for the 24/7 grid test	Recommendation

PRR 1515: Adding additional clarifying information for the 24/7 grid test

- Reason for revision
 - Added section 5.3.8.1 for common questions for the Grid Ops test and 24/7 real time phone number.
- Recommendation Comments: None
- Recommendation comment period expired: August 15, 2023
- Next step: Post Final Decision

Metering BPM

PRR	PRR Title	Stage
1518	Meter data retention	Recommendation

PRR 1518: Metering

- Reason for revision
 - The reason for revision is to add additional information after an internal review.
- Recommendation Comments: None
- Recommendation comment period expired: August 15, 2023
- Next step: Post Final Decision

Managing Full Network Model BPM

PRR	PRR Title	Stage
1519	Utilize North to South and South to North nomograms in all real-time markets to manage physical and market flows with all lines in service and/or outage conditions	Initial

PRR 1519: Utilize North to South and South to North nomograms in all real-time markets to manage physical and market flows with all lines in service and/or outage conditions

- Reason for revision
 - This revision includes the change in Section 2.1.1.2 to align the BPM with updated contract obligations under the COI Path Operator Agreement and inform market participants that a N-S & S-N flow constraint will be enforced on the California-Oregon Intertie (COI) to manage physical and market flows in all Real-Time Markets (RTD, RTPD, STUC, RTBS).
 - The effective date will be 8/1/2023.
- Initial Comments: Pacificorp
- Initial comment period expired: August 15, 2023
- Next step: Post Recommendation

Reliability Requirements BPM

PRR	PRR Title	Stage
1523	Maximum import capability enhancements policy changes	Initial

PRR 1523: Maximum import capability enhancements policy changes

- Reason for revision
 - BPM changes to reflect the remaining items from the Maximum Import Capability (MIC) Enhancements policy initiative.
- Initial Comments: None
- Initial comment period expired: August 15, 2023
- Next step: Post Recommendation

Market Instruments BPM

PRR	PRR Title	Stage
1516	Bidding limitations for non-generating resources and default energy bid changes associated with energy storage enhancements track 1	Recommendation
1517	Transition cost bid adjustments, reference level change request clarifications, hydro default energy bid update; wholesale electricity price calculation update	Recommendation
1524	Maximum import capability enhancements	Initial

PRR 1516: Bidding limitations for non-generating resources and default energy bid changes associated with energy storage enhancements track 1

- Reason for revision
 - To accommodate changes associated with the Energy Storage Enhancements project.
 - Emergency PRR: Effective July 1, 2023
- Recommendation Comments: None
- Recommendation comment period expired: August 15, 2023
- Next step: Post Final Decision

PRR 1517: Transition cost bid adjustments, reference level change request clarifications, hydro default energy bid update; wholesale electricity price calculation update

- Reason for revision
 - The reasons for the revisions are to make clarifications on existing BPM guidance, as well as make corrections to existing BPM guidance. These clarifications and corrections impact formulas and processes. They do not reflect any new policies and would not require changes to market participants' systems.
- Recommendation Comments: None
- Recommendation comment period expired: August 15, 2023
- Next step: Post Final Decision

PRR 1524: Maximum import capability enhancements

- Reason for revision
 - Provide information on new OASIS reports created by the MIC enhancements project.
- Initial Comments: None
- Initial comment period expired: August 15, 2023
- Next step: Post Recommendation

Market Operations BPM

PRR	PRR Title	Stage
1521	New process to automatically adjust day ahead electronic tags to the match the energy profile to the residual unit commitment final schedule	Initial
1527	Changes to automated dispatch system partial accept and T-minus 20 auto approval	Initial

PRR 1521: New process to automatically adjust day ahead electronic tags to the match the energy profile to the residual unit commitment final schedule

- Reason for revision
 - The CAISO has implemented a process to automatically adjust Day Ahead E-Tags to the match the Energy Profile to the RUC Final Schedule, which executes every day at 15:30. Effective date is 6/15/2023.
- Initial Comments: None
- Initial comment period expired: August 15, 2023
- Next step: Post Recommendation

PRR 1527: Changes to automated dispatch system partial accept and T-minus 20 auto approval

- Reason for revision
 - The CAISO will no longer auto-accept tag changes post T-20. Any post T-20 changes to eTag's will be auto-denied and may be reviewed by the ISO Scheduling desk on a case by case basis.
 - Partial-Acceptance of HASP Awards will be capped at the HASP cleared value. ISO Scheduling Desk will still have the ability to Partial-Accept on behalf of the Scheduling Coordinators, but only to a max value of what cleared HASP
- Initial Comments: None
- Initial comment period expires: September 13, 2023
- Next step: Initial Comment Period Continues

Settlements and Billing BPM

PRR	PRR Title	Stage
1522	Documentation only updates to the real time energy quantity pre-calculation and metered energy adjustment factor pre-calculation for the BAResBaseScheduleEnergy variable.	Initial

PRR 1522: Documentation only updates to the real time energy quantity pre-calculation and metered energy adjustment factor pre-calculation for the BAResBaseScheduleEnergy variable.

- 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 code fix upstream to settlements will ensure that the input designates pumped storage hydro resources in the WEIM balancing authority area as load resources when they are in pumping mode.
 - The BPM configuration guides RT Energy Quantity PC v.5.24.0a and Metered Energy Adjustment Factor PC v.5.16.0a have been updated to reflect a revised definition for the BAResBaseScheduleEnergy variable. The updated description reflects that the data will be under resource type = “LOAD” during intervals in which a pumped storage hydro resource located in the WEIM Balancing Authority Area has a negative base schedule.
 - The upstream changes are to be deployed around 7/31/2023. The effective date of those changes will align to the BPM effective date of 4/1/2023.
- Initial Comments: None
- Initial comment period expired: August 15, 2023
- Next step: Post Recommendation

Congestion Revenue Rights BPM

PRR	PRR Title	Stage
1520	Process for handling disconnected PNodes for congestion revenue rights purposes	Initial

PRR 1520: Process for handling disconnected PNodes for congestion revenue rights purposes

- Reason for revision
 - Due to the DAM software parameter update which increases the node replacement layer for disconnected node which eliminate the manual workaround in CRR and price correction
- Initial Comments: None
- Initial comment period expired: August 15, 2023
- Next step: Post Recommendation

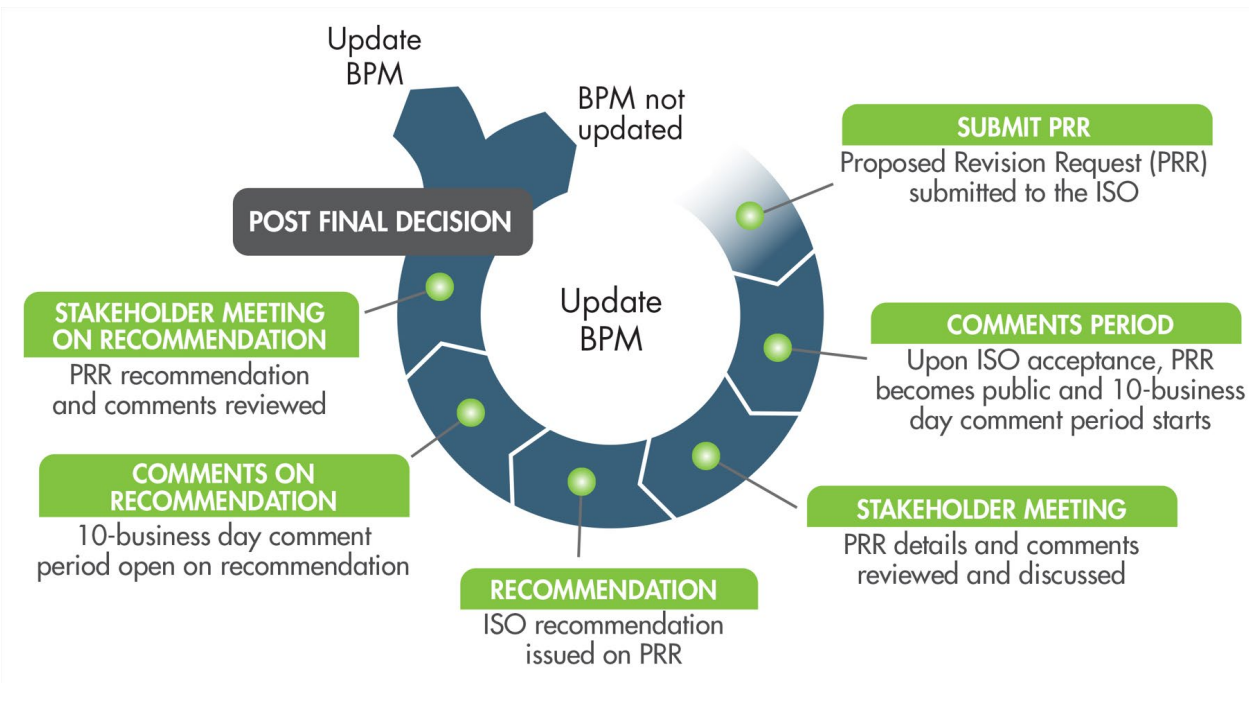
Energy Imbalance Market BPM

PRR	PRR Title	Stage
1525	Emergency Assistance Energy Transfer Opt-In Process	Initial

PRR 1525: Emergency Assistance Energy Transfer Opt-In Process

- Reason for revision
 - Emergency PRR Effective 8/14/2023
 - Introduction of an Emergency AET Opt-In process should system conditions or uncertainty deviate and reliability necessitates, available to CAISO as well as WEIM entities.
- Initial Comments: None
- Initial comment period expired: September 13, 2023
- Next step: Initial Comment Period Continues

Next BPM PRR Review Monthly Meeting: September 26, 2023 @ 11 a.m.



BPM change management
process questions:

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