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
December 19, 2023

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<td>Introduction / Meeting Overview</td>
<td>Ryan Ayer</td>
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<td>Market Operations</td>
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<td>Settlements and Billing</td>
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BPM Change Management Process
BPM_CM@caiso.com
### California ISO Stakeholder Initiative Process

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<tr>
<th>PROPOSAL DEVELOPMENT</th>
<th>DECISION</th>
<th>IMPLEMENTATION</th>
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<tr>
<td>Issue paper and working groups</td>
<td>ISO Board</td>
<td>Business practice manual</td>
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<td>Straw proposal</td>
<td>EIM Governing Body</td>
<td>Training</td>
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<td>Draft final proposal</td>
<td>Tariff filing</td>
<td>Market simulation</td>
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<tr>
<td>Draft business requirement specification</td>
<td>FERC</td>
<td>Go Live</td>
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<tr>
<td>Draft tariff and business practice manual revisions</td>
<td></td>
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#### Stakeholder input

- **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 roadmap 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.*
## Market Operations

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<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
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<tr>
<td>1542</td>
<td>Addition of regulation attenuation factors associated with the state of charge equation with ancillary impact</td>
<td>Initial</td>
</tr>
<tr>
<td>1541</td>
<td>Update to allow pseudo-tie resources to be part of co-located aggregate capability constraints</td>
<td>Recommendation</td>
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PRR 1542 – Addition of regulation attenuation factors associated with the state of charge equation with ancillary impact

- Reason for revision
  - Adds regulation attenuation factors associated with the state of charge equation with ancillary impact and their associated formulas for Energy Storage Enhancements Phase 2 deployment. Effective date 11/1/2023.

- Initial comments:
  - None

- Initial comment period expired:
  - December 18, 2023

- Next step:
  - Post Recommendation
PRR 1541 – Update to allow pseudo-tie resources to be part of co-located aggregate capability constraints

- **Reason for revision**
  - Interconnection Customer or the Pseudo-Tie Generating Facility may elect to have Co-located Resource modeled utilizing Aggregate Capability Constraint (ACC) located at its Point-of-Interconnection (POI)

- **Recommendation comments:**
  - None

- **Recommendation comment period expired:**
  - December 18, 2023

- **Next step:**
  - Post Final Decision
## Settlements and Billing

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<tr>
<th>PRR</th>
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<th>Stage</th>
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<tr>
<td>1540</td>
<td>Updated multiple configuration guides to accommodate fixing typos in variable names which are otherwise correct in the bill determinate matrix and the settlements system</td>
<td>Recommendation</td>
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PRR 1540 – Updated multiple configuration guides to accommodate fixing typos in variable names which are otherwise correct in the bill determinate matrix and the settlements system

• Reason for revision
  – A CIDI ticket triggered the change. Documentation only updates are required in order to fix typos in variable names which are otherwise correct in the bill determinant matrix and the Settlements system. Initial comments:
    – None

• Recommendation comment period expired:
  – December 18, 2023

• Next step:
  – Post Final Decision
Next BPM PRR Review Monthly Meeting:
January 23, 2024 @ 11 a.m.

BPM change management process questions:
Nicole Hines
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