BPM Change Management Meeting

Radha Madrigal
Lead Client Trainer

BPM_CM@caiso.com

February 22, 2022

The information contained in these materials is provided for general information only and does not constitute legal or regulatory advice. The ultimate responsibility for complying with the ISO FERC Tariff and other applicable laws, rules or regulations lies with you. In no event shall the ISO or its employees be liable to you or anyone else for any decision made or action taken in reliance on the information in these materials.
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

**November 16, 2021**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction / Meeting Overview</td>
<td>Radha Madrigal</td>
</tr>
<tr>
<td><strong>Discussion of active proposed changes:</strong></td>
<td></td>
</tr>
<tr>
<td>Market Operations BPM</td>
<td>Michael Martin</td>
</tr>
<tr>
<td>Market Instruments BPM</td>
<td>Michael Martin</td>
</tr>
<tr>
<td>Candidate CRR Holder Registration BPM</td>
<td>Radha Madrigal</td>
</tr>
<tr>
<td>Credit Management and Market Clearing</td>
<td>Christina Billing</td>
</tr>
<tr>
<td>Wrap-Up and Next Steps</td>
<td>Radha Madrigal</td>
</tr>
</tbody>
</table>

**BPM Change Management Process**

BPM_CM@caiso.com
• 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 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.
## Market Operations BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1404</td>
<td>Market operations BPM edits related to energy storage and distributed energy resources phase 4 cleanup</td>
<td>Initial</td>
</tr>
<tr>
<td>1403</td>
<td>Treatment of expected energy for non-participating energy imbalance market resources</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1404 – Market operations BPM edits related to energy storage and distributed energy resources phase 4 cleanup

• Reason for revision
  – Clean-up edits related to ESDER4 initiative that was implemented few months ago. The scope of the edits are as follows: 1. Edits to remove multiple instances of the same information for ease of revision control. 2. Miscellaneous clean-up edits that were identified after the initial PRRs for ESDER4 were posted. 3. Additional information and examples of EOH SOC management.

• Initial comments: None
• Initial comment period expired: February 15, 2022
• Next step: Post Recommendation
PRR 1403 – Treatment of expected energy for non-participating energy imbalance market resources

• Reason for revision
  – Changes to the treatment of expected energy for non-participating EIM resources, as the current language reflects the implementation per the original EIM program. The revised language reflects a change made in the EIM year 1 project implementation.

• Initial comments: None
• Initial comment period expired: February 15, 2022
• Next step: Post Recommendation
## Market Instruments BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1405</td>
<td>Market instruments BPM edits related to energy storage and distributed energy resources phase 4 cleanup</td>
<td>Initial</td>
</tr>
<tr>
<td>1402</td>
<td>Updates to after-market cost recovery and reference level calculator change requests for Extremely Long Start resources</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1405 – Market instruments BPM edits related to energy storage and distributed energy resources phase 4 cleanup

- Reason for revision
  - Clean-up edits related to ESDER4 initiative that was implemented few months ago. The scope of the edits are as follow: Revising language to remove the criteria of a resource’s ultimate parent company being a net buyer from the “safe harbor” mitigation exemption for small storage resources (under 5 MW).

- Initial comments: None
- Initial comment period expired: February 15, 2022
- Next step: Post Recommendation
PRR 1402 – Updates to after-market cost recovery and reference level calculator change requests for Extremely Long Start resources

• Reason for revision
  – Updates Attachment O to clarify aspects of the after-market cost recovery process and reference level change requests for Extremely Long Start resources. Also includes numerous minor editorial changes.
• Initial comments: None
• Initial comment period expired: February 15, 2022
• Next step: Post Recommendation
## Credit Management and Market Clearing BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1400</td>
<td>Revisions to section 8.4.1 related to market participants leaving the market or incurring substantial activity level changes</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1400 – Revisions to section 8.4.1 related to market participants leaving the market or incurring substantial activity level changes

• Reason for revision
  – Adding clarifying language to support current documentation for Market Participants Leaving the Market or Incurring Substantial Activity Level Changes. Effective at the end of the PRR process.

• Recommendation Comments: None
• Recommendation comment period expired: February 15, 2022
• Next step: Post Final Decision
## Candidate CRR Holder Registration BPM

<table>
<thead>
<tr>
<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1401</td>
<td>Additional information for CRR holders terminating agreements</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1401 – Additional information for CRR holders terminating agreements

• Reason for revision
  – Adding clarifying language for CRR holders subject to load migration wishing to terminate their CRR Holder Entity Agreement.

• Recommendation Comments: None
• Recommendation comment period expired: February 15, 2022
• Next step: Post Final Decision
Next BPM PRR Review Monthly Meeting: March 22, 2022 @ 11 a.m.

BPM change management process questions: Nicole Hines 
BPM_CM@caiso.com