



BPM Change Management Meeting

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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.

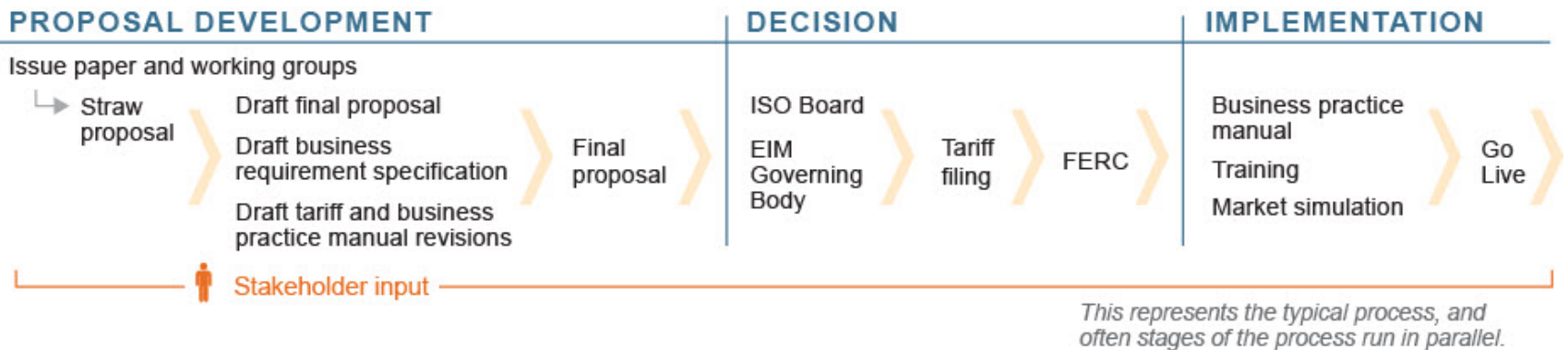
Agenda – BPM Change Management Meeting

November 16, 2021

Topic	Presenter
Introduction / Meeting Overview	Nicole Hines
Discussion of active proposed changes: Market Operations BPM Settlements and Billing BPM Candidate CRR Holder Registration BPM Credit Management and Market Clearing	Jamal Batakji Massih Ahmadi Nicole Hines Christina Billing
Wrap-Up and Next Steps	Nicole Hines

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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.*

Settlements and Billing BPM

PRR	PRR Title	Stage
1399	Updated multiple BPM configuration guides to accommodate settling WAPA/TANC Contract 05-SNR-00869	Recommendation
1398	Update BPM configuration guides to support the day ahead nodal pricing model phase 2 ancillary services Initiative	Recommendation
1397	Updates to BPM for tariff amendment adjusting the meaning of business day (FERC Filing ER21-2854-000)	Recommendation
1394	Updated BPM Configuration guide for charge code 4575 to clarify business rule 4.1 exclusions and variable name	Recommendation

PRR 1399 – Updated multiple BPM configuration guides to accommodate settling WAPA/TANC Contract 05-SNR-00869

- Reason for revision
 - The new contract WAPA/TANC Contract 05-SNR-00869 triggered this change. The configuration change addresses the settlement of losses on the California-Oregon Transmission Project (COTP) transmission line. The BPM configuration will charge those Scheduling Coordinators that schedule in COTP at the TRCYCOTPIISO intertie based upon Gross Import/Export and the Loss factor in CC 6976 and allocate those revenues to a single Western Area Power Admin (WAPA) SCID in CC 6976. CC 6976 and PC Allocation of Trans Losses Under Control Agreements are directly impacted. The effective trade date of the change 4/1/2021 and the anticipated implementation date is 2/16/2022.
- Recommendation comments: None
- Recommendation comment period expired: January 19, 2022
- Next step: Post Final Decision

PRR 1398 – Update BPM configuration guides to support the day ahead nodal pricing model phase 2 ancillary services Initiative

- Reason for revision
 - For Phase 2 of the Nodal Pricing Model (NPM) proposal, it was requested that CAISO expand from Phase 1 to include Ancillary Service features leveraging the existing Day-Ahead Market (DAM) technology platform, full network model, and data interfaces available in the real-time Energy Imbalance Market (EIM) to provide EIM Merchants with NPM.
 - The CAISO will provide any participant that elects to utilize DA-NPM with advisory settlements inclusive of Ancillary Services (Spin, Non-Spin, Regulation Up, Regulation Down).
 - The updated configuration guides GMC Bid Transaction Fee 4515 5.7 and Pre-Calc Ancillary Services 5.11 supports this advisory settlement feature of the initiative.
 - CAISO anticipates implementation of the BPM changes on or about 2/16/2022, with an effective date of 2/16/2022.
- Recommendation comments: None
- Recommendation comment period expired: January 19, 2022
- Next step: Post Final Decision

PRR 1397 – Updates to BPM for tariff amendment adjusting the meaning of business day (FERC Filing ER21-2854-000)

- Reason for revision
 - On November 4, 2021, the Federal Energy Regulatory Commission (FERC) issued a letter order accepting California Independent System Operator Corporation's September 8, 2021 filing of revisions to its Open Access Transmission Tariff to use the separate undefined term "business day" that aligns with the days etc. under ER21-2854.
- Recommendation comments: None
- Recommendation comment period expired: January 19, 2022
- Next step: Post Final Decision

PRR 1394 – Update BPM configuration guides to support the day ahead nodal pricing model phase 2 ancillary services Initiative

- Reason for revision
 - When researching IMS ticket 00227737, the current settlement process associated with FERC resolved the dispute. The issue being resolved is the settlement system does not assess FERC Fee on statements executed after T+70B, and this clarification will align initial with recalculation statements. This impacts CC 4575 by updating Business Rule 4.1 to also exclude; Yearly FERC Fee Over-Under Recovery and FERC Fee Settlement charge codes (525, 550, 551) from triggering 4575. Also an update for a variable name to align with existing design template naming conventions.
 - This is retroactive to 4/1/2009 as it is a documentation only clarification, and is anticipated by 11/31/2021.
- Recommendation comments: None
- Recommendation comment period expired: January 19, 2022
- Next step: Post Final Decision

Market Operations BPM

PRR	PRR Title	Stage
1396	Base schedule submission deadline	Recommendation
1395	Interchange transactions and electronic tagging	Recommendation

PRR 1396 – Base schedule submission deadline

- Reason for revision
 - Adding a special rule to section C.2.1.24 of the Market Operations BPM when a BASE schedule is submitted below PMIN and above zero for purposes of submitting startup energy. Effective Date:11/1/2021
- Recommendation comments: None
- Recommendation comment period expired: January 19, 2022
- Next step: Post Final Decision

PRR 1395 – Interchange transactions and electronic tagging

- Reason for revision
 - Providing a full disclosure on the process to unilaterally adjust e-tags with the RUC schedules. This practice provides important information to the sink BA on the RUC schedule. Targeted upon completion of the PRR process.
- Recommendation comments: None
- Recommendation comment period expired: January 19, 2022
- Next step: Post Final Decision

Credit Management and Market Clearing BPM

PRR	PRR Title	Stage
1400	Revisions to section 8.4.1 related to market participants leaving the market or incurring substantial activity level changes	Initial

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.
- Initial Comments: None
- Initial comment period expired: January 19, 2022
- Next step: Post Recommendation

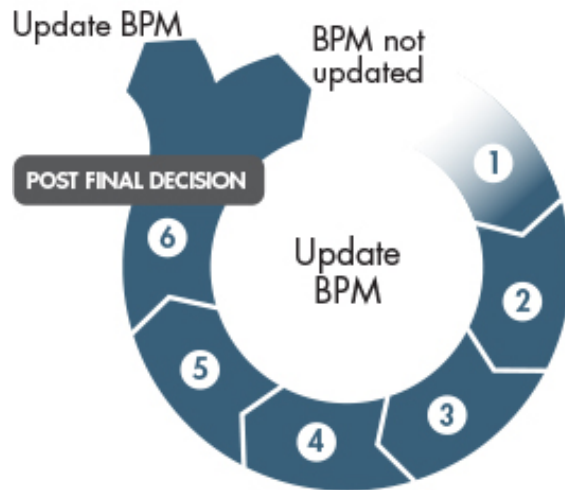
Candidate CRR Holder Registration BPM

PRR	PRR Title	Stage
1401	Additional information for CRR holders terminating agreements	Initial

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.
- Initial Comments: None
- Initial comment period expired: January 19, 2022
- Next step: Post Recommendation

Next BPM PRR Review Monthly Meeting: February 22, 2022 @ 11 a.m.



- 1 SUBMIT PRR**
Proposed Revision Request (PRR) submitted to the ISO
- 2 COMMENTS PERIOD**
Upon ISO acceptance, PRR becomes public and 10-business day comment period starts
- 3 STAKEHOLDER MEETING**
PRR details and comments reviewed and discussed
- 4 RECOMMENDATION**
ISO recommendation issued on PRR
- 5 COMMENTS ON RECOMMENDATION**
10-business day comment period open on recommendation
- 6 STAKEHOLDER MEETING ON RECOMMENDATION**
PRR recommendation and comments reviewed

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process questions:
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