



BPM Change Management Meeting

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June 28, 2022

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- Please keep comments professional and respectful.

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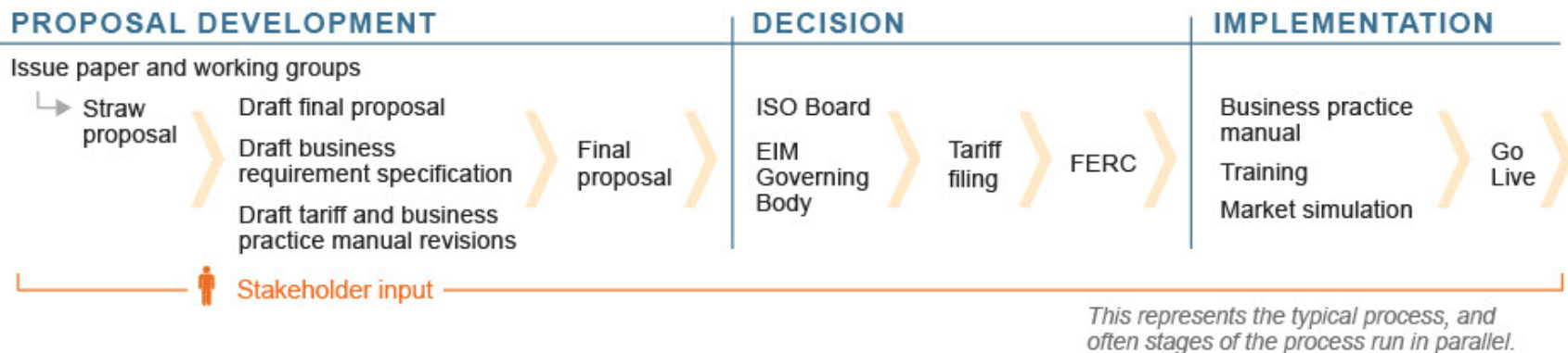
Agenda – BPM Change Management Meeting

June 28, 2022

Topic	Presenter
Introduction / Meeting Overview	Nicole Hines
Discussion of active proposed changes: Demand Response Reliability Requirements Energy Imbalance Market Market Operations Market Instruments Settlements and Billing	Elaine Siegel Melanie Bogen Michael Martin Michael Martin Michael Martin Massih Ahmadi
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.*

Demand Response BPM

PRR	PRR Title	Stage
1444	Monitoring data clarification	Initial
1438	Resource sufficiency evaluation enhancements	Recommendation

PRR 1444: Monitoring data clarification

- Reason for revision
 - To provide clarity on when monitoring data is due and to define sanctions that could be applied if the data is not submitted timely
- Initial Comments: None
- Initial comment period expired: June 14, 2022
- Next step: Post Recommendation

PRR 1438: Resource sufficiency evaluation enhancements

- Reason for revision
 - Section 17 was added to account for non-participating Demand Response scheduling and to have references to the EIM BPM.
 - Section 18 was added to account for non participating Demand response in the (Automated Load Forecast System) ALFS forecasting and to have references to the EIM BPM
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

Reliability Requirements BPM

PRR	PRR Title	Stage
1443	2023 Availability assessment hours	Initial

PRR 1443 - 2023 Availability assessment hours

- Reason for revision
 - Added availability assessment hours for 2023.
- Initial Comments: None
- Initial comment period expired: June 14, 2022
- Next step: Post Recommendation

Energy Imbalance Market BPM

PRR	PRR Title	Stage
1440	Enhancements to the resource sufficiency evaluation tests per the resource sufficiency evaluation enhancement phase 1 project	Recommendation

PRR 1440: Enhancements to the resource sufficiency evaluation tests per the resource sufficiency evaluation enhancement phase 1 project

- Reason for revision
 - Changes reflect numerous enhancements and improvements to the RSE tests per the project and stakeholder efforts of the RSE Enhancements Phase 1 project. Effective Date June 1, 2022
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

Market Operations BPM

PRR	PRR Title	Stage
1441	Ramp rate limitation for certain inverter-based resources	Recommendation
1433	Enforcement of aggregate capability constraints	Recommendation
1432	Addition of 15 interval threshold to regulation service minimum performance testing	Recommendation

PRR 1441: Ramp rate limitation for certain inverter-based resources

- Reason for revision
 - This change is designed to better handle inverter-based resources without a plan controller or without the capability to follow Dispatch Instructions
- Recommendation Comments: Southern California Edison
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

PRR 1433: Enforcement of aggregate capability constraints

- Reason for revision
 - Added a new section on actions when co-located resources utilizing an aggregate capability constraint (ACC) exceed the Interconnection Service Capacity limits for their Generating Facility
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

PRR 1432: Addition of 15 interval threshold to regulation service minimum performance testing

- Reason for revision
 - Process improvement for resources that do not provide at least 15 intervals of regulation service in one calendar month.
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

Market Instruments BPM

PRR	PRR Title	Stage
1442	Allowing for the bidding of negative pumping costs	Initial
1439	New CAISO market results interface, and open access same time information system reports for resource sufficiency evaluation and transmission service and market scheduling priorities project	Recommendation
1434	Proxy demand response resource bidding above \$1000 energy bid cap	Recommendation

PRR 1442: Allowing for the bidding of negative pumping costs

- Reason for revision
 - Allow entities to bid negative pumping costs, which may be desired during certain times of the year (e.g., Over-Gen conditions).
 - Effective date is 5/31/2022
- Initial Comments: None
- Initial comment period expired: June 14, 2022
- Next step: Post Recommendation

PRR 1439: New CAISO market results interface, and open access same time information system reports for resource sufficiency evaluation and transmission service and market scheduling priorities project

- Reason for revision
 - New OASIS and CMRI reports and additions for the RSE and TSMSP projects. Specifically for the RSE project, a new CMRI report for Resource Bid Range Capacity and new field additions to the existing Flex Ramp Capacity and Bid Capacity Test Data reports. For TSMSP, new OASIS reports for Load Adjustments and Schedule Reductions. These are to be effective June 1 2022.
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

PRR 1434: Proxy demand response resource bidding above \$1000 energy bid cap

- Reason for revision
 - Described details on RDRR ability to submit bids (in the RTM only) above the \$1,000/MWh energy bid cap when conditions are satisfied.
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

Settlements and Billing BPM

PRR	PRR Title	Stage
1437	Updates to BPM for new settlement timeline	Initial
1436	Updated BPM configuration guide for charge code 4575 to clarify business rule 4.1 exclusions covering flexible ramping	Recommendation
1435	Update configuration guide to match settlements BPM formula on virtual bid adjustment for western energy imbalance market balancing authority areas as configured	Recommendation
1431	Updated CC 6046 over and under scheduling western energy imbalance market allocation to accommodate resource sufficiency evaluation enhancements phase 1	Recommendation

PRR 1437: Updates to BPM for new settlement timeline

- Submitted by SRP
- Reason for revision
 - The current BPM needs to reflect the current Settlement Timeline to allow entities to properly validate relevant settlements.
- Initial Comments: None
- Initial comment period expired: June 14, 2022
- Next step: Post Recommendation

PRR 1436: Updated BPM configuration guide for charge code 4575 to clarify business rule 4.1 exclusions covering flexible ramping

- Reason for revision
 - When researching IMS ticket 247820, flexible ramping was incorrectly triggering the GMC 4575 scheduling coordinator ID charge code. This impacts CC 4575 by updating Business Rule 4.1 to also exclude; Flex Ramp Uncertainty Up/Down (CC7071, CC7077, CC7078, CC7081, CC7087, CC7088) and Flex Ramp Forecasted Movement (CC7070, CC7076) from triggering 4575.
 - This is retroactive to 1/1/2022 as it is a documentation only clarification, and is anticipated by 5/31/2022.
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

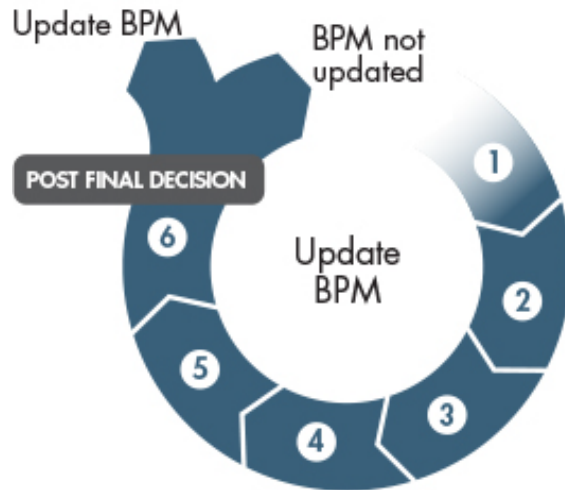
PRR 1435: Update configuration guide to match settlements BPM formula on virtual bid adjustment for western energy imbalance market balancing authority areas as configured

- Reason for revision
 - Research into CIDI ticket #249262 uncovered a single formula discrepancy between the BPM and as-is configuration. The allocation of congestion revenue from Virtual Bid adjustment to EIM BAAs via `BAASettlementIntervalTotalRTEnergyCongestionAmount` where `RTCongRevenueVirtualBidAdjAmount` is subtracted is incorrect. The system as configured is adding `RTCongRevenueVirtualBidAdjAmount` and this is the correct treatment since the adjustment is intended to be a credit to EIM BAA.
 - The calculation is done in Real Time Congestion Pre-calc feeds CC 6774 (RT Congestion Offset, only pass through, and no error exists for CAISO BAA) and then ultimately settled into CC 67740 (RT Cong Offset EIM) for EIM BAAs. For reference, the associated impacted variables and bill determinant names are as follows:
 - `BAASettlementIntervalTotalRTEnergyCongestionAmount` (`BAA_5M_RT_ENGY_CONG@AMOUNT`)
 - `RTCongRevenueVirtualBidAdjAmount` (`VIRTUAL_BID_5M_RTD_ADJ_CONG_REV@AMOUNT`).
 - Documentation edits only have been made to versions of RT Congestion Precalc Configuration guide as listed above in order match the system configured calculations starting Trade Date 11/1/2021 and beyond.
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

PRR 1431: Updated CC 6046 over and under scheduling western energy imbalance market allocation to accommodate resource sufficiency evaluation enhancements phase 1

- Reason for revision
 - To accommodate the Resource Sufficiency Evaluation Enhancements Phase 1 initiative, changes were required to 6046 Over and Under Scheduling EIM Allocation 5.4 to remove the CAISO from allocation eligibility. This change is prospective from 6/1/2022 and expected implementation is 5/29/2022.
- Recommendation Comments: None
- Recommendation comment period expired: June 14, 2022
- Next step: Post Final Decision

Next BPM PRR Review Monthly Meeting: July 26, 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

BPM change management
process questions:

Nicole Hines

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