



BPM Change Management Meeting

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March 24, 2020

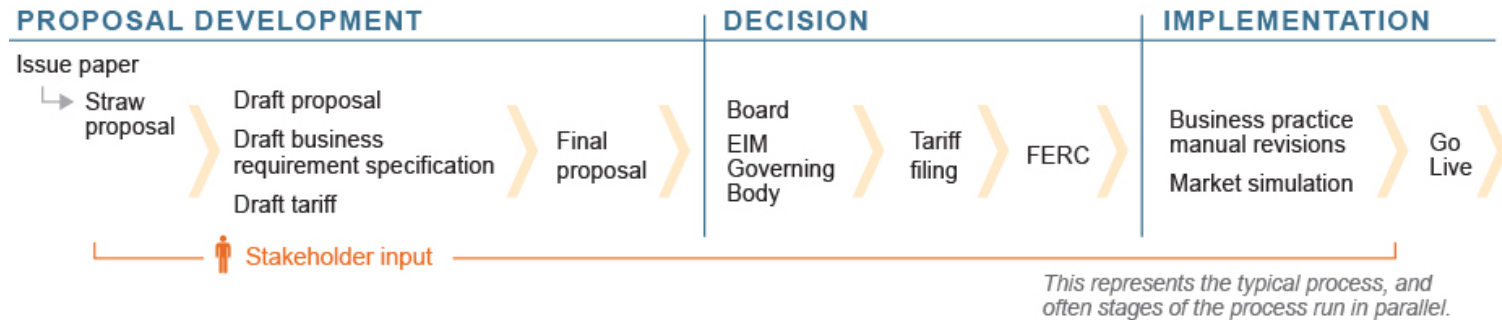
Agenda – BPM Change Management Meeting

March 24, 2020

Topic	Presenter
Introduction / Meeting Overview	Nicole Hines
Discussion of active proposed changes: Settlements and Billing BPM Transmission Planning Process BPM Candidate CRR Holder Registration BPM Market Instruments BPM Market Operations BPM Direct Telemetry BPM Managing Full Network Model BPM Demand Response BPM Congestion Revenue Rights BPM	Brenda Corona Gary DeShazo Rashele Wiltzius Jamal Batakji Jamal Batakji Priyanka Namburi Vivian Liang Pia Sok Jim McClain
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.*

Settlements and Billing BPM

PRR	PRR Title	Stage
1234	Updated BPM configuration guides for CC 5701 and CC 5705 to allow for correct settlement of the reliability coordinator minimum charge for entities onboarding outside of April 1 timeline	Initial
1233	Updated configuration guides for CC 1001, CC 1101 and CC 3101 and created new BPM configuration guides for CC 3102 and CC 1102 with regard to settlement and invoicing impacts from Black start system restoration phase 2 initiative	Initial
1227	Updated BPM configuration guide for PC HVAC metered load 5.6 to accommodate FERC order 841	Recommendation

PRR 1234 – Updated BPM configuration guides for CC 5701 and CC 5705 to allow for correct settlement of the reliability coordinator minimum charge for entities onboarding outside of April 1 timeline

- Reason for revision
 - Configuration changes allow for the correct settlement of the reliability coordinator (RC) minimum charge to no-load Transmission Operator customers that may onboard outside of the April 1 timeline. These changes include the ability to charge via a re-calculation, as needed in the initial onboarding year, the pro-rata charges of the RC minimum charge.
 - Clarified BPM for Settlements and Billing and BPM Configuration guide for CC 5702 with regard to RC Services invoice payment due date and late payment assessment.
 - The planned production deployment date is 4/29/2020 with a 1/1/2020 effective date.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - March 17, 2020
- Next step:
 - Post recommendation

PRR 1233 – Updated configuration guides for CC 1001, CC 1101 and CC 3101 and created new BPM configuration guides for CC 3102 and CC 1102 with regard to settlement and invoicing impacts from Black start system restoration phase 2 initiative

- Reason for revision
 - Configuration changes for the settlement and invoicing impacts in black start system restoration phase 2 initiative business requirement's revisions. For CAISO to secure additional black start capability, the CAISO is changing its current practice regarding procurement and compensation for black start services. Therefore, CC 3102 will be derived based on black start capability payments and contractual cost recovery payments to generator owners and CAISO allocate such payments to participating transmission owners in CC 1102 on the black start capability invoice. Also, CC 1001 will also be updated to accommodate settlement of 'BLACK START' exceptional dispatch types.
 - The two charge codes that will be terminated are CC 1101 black start capability allocation and CC 3101 black start capability settlement. The CC 1001 black start energy payment was updated while CC 3102 black start capability settlement and CC 1102 black start capability allocation were newly created. CC 3102 and CC 1102 will be associated with the BLACK_START_CAP_PMT charge group and the BLACK_START_CAP parent group.
 - BPM for Settlements and Billing has also been further revised to support the implementation for black start capability invoice.
The planned production deployment date is 4/29/2020 with a 5/1/2020 effective date
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - March 17, 2020
- Next step:
 - Post recommendation

PRR 1227 – Updated BPM configuration guide for PC HVAC metered load 5.6 to accommodate FERC order 841

- Reason for revision
 - With the implementation of FERC 841 as part of the Fall 2019 settlements release, a filter was added to remove pumped-storage hydro units from the PC HVAC Metered Load Settlements. This requirement was originally deployed with a 12/1/2019 effective date. In order to align to tariff, the effective date for transmission access charge (TAC) settlement of pumped-storage hydro units will be adjusted from December 1, 2019 to December 3, 2019. The implementation is being processed as an emergency release in order to ensure correct settlement on the T+55 statement. The exact deployment date was February 5th.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - March 17, 2020
- Next step:
 - Post final decision

Transmission Planning Process BPM

PRR	PRR Title	Stage
1232	Consolidation of interregional transmission coordination information into a single chapter	Initial

PRR 1232 – Consolidation of interregional transmission coordination information into a single chapter

- Reason for revision
 - Current version 19 of the Transmission Planning Process BPM has information and requirements associated with Order 1000 interregional transmission coordination in several sections associated with the Phase 1 and Phase 2 transmission planning process. Version 20 consolidates interregional transmission coordination BPM information and requirements into a single chapter.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - March 17, 2020
- Next step:
 - Post recommendation

Candidate CRR Holder Registration BPM

PRR	PRR Title	Stage
1231	Update to congestion revenue rights holder application and corrected formatting	Initial

PRR 1231 – Update to congestion revenue rights holder application and corrected formatting

- Reason for revision
 - Added proposed commencement date to CRR Holder Application form per tariff requirement. Also updated all URL links in document and corrected outline formatting and table of contents.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - March 17, 2020
- Next step:
 - Post recommendation

Market Instruments BPM

PRR	PRR Title	Stage
1230	Additional clarification and timeline for review of Masterfile modifications	Initial

PRR 1230 – Additional clarification and timeline for review of Masterfile modifications

- Reason for revision
 - The proposed modifications to the Master File Procedures section B.1 provide additional clarifications and defined timelines for review of Masterfile changes, including timelines for submission of supporting documentation and ISO response.
 - Effective date is upon completion of the PRR process.
- Initial comments:
 - PG&E, submitted 3/16/20
 - Idaho Power Company, submitted 3/17/20
- Initial comment period expired:
 - March 17, 2020
- Next step:
 - Post recommendation

Market Operations BPM

PRR	PRR Title	Stage
1224	Ancillary services on variable energy resource	Recommendation
1222	Manual assignment of ancillary services - fifteen minute market interval determination	Recommendation
1221	E-Tag adjustments and curtailments rules	Recommendation
1220	How should partial configuration outages be treated	Recommendation

PRR 1224 – Ancillary services on variable energy resource

- Reason for revision
 - This BPM change is effective as of January 8, 2020. The ISO's market has seen an increase in the penetration of variable energy resources (VER). In recent years, some of these VERs have developed technologies to provide ancillary services. This BPM change reflects the market enhancement to enable VER resources to offer ancillary services in the ISO markets.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - March 17, 2020
- Next step:
 - Post final decision

PRR 1222 – Manual assignment of ancillary services - fifteen minute market interval determination

- Reason for revision
 - This change that is already in effect is to add a settlement process on a manually procured ancillary services that do not start or end on a 15-minute boundary.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - March 17, 2020
- Next step:
 - Post final decision

PRR 1221 – E-Tag adjustments and curtailments rules

- Reason for revision
 - This is a clarification that is already in effect to the E-Tag adjustment and curtailment rules as requested by market participants.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - March 17, 2020
- Next step:
 - Post final decision

PRR 1220 – How should partial configuration outages be treated

- Reason for revision
 - The existing process may calculate real-time bid costs associated with decremental energy from the day-ahead configuration where the day-ahead configuration was outaged or de-rated in real-time. In this scenario, the resource is not entitled to bid cost recovery. Instead this energy will be charged at the LMP.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - March 17, 2020
- Next step:
 - Post final decision

Direct Telemetry BPM

PRR	PRR Title	Stage
1229	Removing dispersive technologies	Initial

PRR 1229 – Removing dispersive technologies

- Reason for revision
 - Dispersive is no longer an CAISO telemetry transport option.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - March 17, 2020
- Next step:
 - Post recommendation

Managing Full Network Model BPM

PRR	PRR Title	Stage
1228	Aliso Canyon tariff provisions – FERC Order ER20-273	Initial
1225	Model schedule update and clarification on applicability for reliability coordinator services	Recommendation

PRR 1228 – Aliso Canyon tariff provisions – FERC Order ER20-273

- Reason for revision
 - This revision includes the changes in Section 4.2.7.1.2 to align with tariff revisions to make Aliso Canyon provisions permanent per FERC Order ER20-273.
 - The effective date was December 31, 2019.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - March 17, 2020
- Next step:
 - Post recommendation

PRR 1225 – Model schedule update and clarification on applicability for reliability coordinator services

- Reason for revision
 - Add language in Section 1.2 to clarify the applicability of the Business Practice Manual for reliability coordinator services;
 - Update Section 5.1 to realign with Full Network Model schedule process.
 - Effective date: April 1, 2020
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - March 17, 2020
- Next step:
 - Post final decision

Demand Response BPM

PRR	PRR Title	Stage
1226	Appendix B updates to clarify TMNT measurement type data requirement	Recommendation

PRR 1226 – Appendix B updates to clarify TMNT measurement type data requirement

- Reason for revision
 - Appendix B updates to clarify TMNT measurement type data requirement. Plus, removal of footnote 6, which it covered in the BPM for demand response.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - March 17, 2020
- Next step:
 - Post final decision

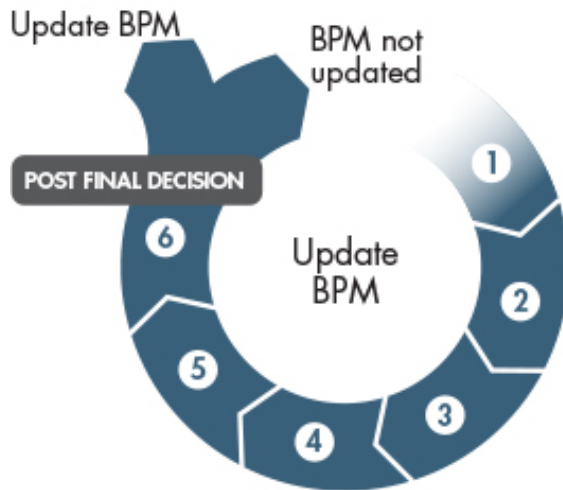
Congestion Revenue Rights BPM

PRR	PRR Title	Stage
1223	Congestion revenue rights transparency project	Recommendation

PRR 1223 – Congestion revenue rights transparency project

- Reason for revision
 - To provide additional language in Attachment J to address the new data being made available under the CRR transparency project. Effective date of these changes is tentatively scheduled for late April.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - March 17, 2020
- Next step:
 - Post final decision

Next BPM PRR Review Monthly Meeting: April 28, 2020 @ 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:

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