



BPM Change Management Meeting

Julia Payton

BPM Change Management Process Administrator

BPM_CM@caiso.com

November 27, 2018

Agenda – BPM Change Management Meeting

November 27, 2018

Topic	Presenter
Introduction / Meeting Overview	Julia Payton
Discussion of active BPM proposed changes: Reliability Coordinator BPM Changes Settlements and Billing Congestion Revenue Rights Reliability Requirements Reliability Coordinator Services Outage Management Managing Full Network Model Energy Imbalance Market Market Operations	Bonnie Peacock Jim McClain / Jacob Fox Gautham Katta Gautham Katta Gautham Katta Vivian Liang Jamal Batakji Jamal Batakji
Wrap-Up and Next Steps	Julia Payton

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.*

Managing Full Network Model BPM Initial Phase PRRs for Discussion

PRR	PRR Title
1097	Reliability coordinator services updates

PRR 1097 – Reliability coordinator services updates

- **Reason for revision**

- This revision includes the following changes.
 - Update language to support Reliability Coordinator Services;
 - Introduce the monthly model update cycle;
 - Add the requirement for notification to CAISO of new and updated impedances for new or existing transmission asset.
- The effective date of the change will be February 1, 2019.

- **Initial comments**

- Bonneville Power Administration
- Salt River Project
- Calpine

- **Initial comment period expired**

- November 16, 2018

- **Next step** Post recommendation / Recommendation comment period

Settlements and Billing BPM

Reliability Coordinator Services - Initial Phase PRR

PRR	PRR Title
1099	Updates to the BPM for Settlements and Billing to support the implementation of reliability coordinator services

PRR 1099 – Updates to the BPM for Settlements and Billing to support the implementation of reliability coordinator services

- **Reason for revision**

- The attached BPM for Settlements and Billing contains updates for billing and settlements specific to RC Services and HANA charges. Additional BPMs for RC Charges and HANA charge codes will be published in future PRRs. For additional information regarding RC Services and HANA, please refer to
- These changes are effective July 1, 2019 to coincide with the CAISO Tariff amendment filed August 31, 2018

- **Initial comments**

- No initial comments submitted

- **Initial comment period expired**

- November 16, 2018

- **Next step**

- Post recommendation / Recommendation comment period

Reliability Coordinator Services BPM Initial Phase PRRs for Discussion

PRR	PRR Title
1104	Reliability Coordinator Services BPM

PRR 1104 – Reliability Coordinator Services BPM

- **Reason for revision**
 - This is a new BPM as CAISO will take on reliability coordinator services.
- **Initial comments**
 - Calpine 11/5
 - Salt River Project 11/8
- **Initial comment period expired**
 - November 16, 2018
- **Next step**
 - Post recommendation / Recommendation comment period

Settlements and Billing BPM

Recommendation Phase PRRs for Discussion

PRR	PRR Title
1094	Emergency: Update the pre-calculation metered sub-system deviation penalty quantity configuration to properly account for metered sub-system Load following instructed imbalance energy for an metered sub-system load following resource

PRR 1094 – Emergency: Update the pre-calculation metered sub-system deviation penalty quantity configuration to properly account for metered sub-system Load following instructed imbalance energy for an metered sub-system load following resource

- **Reason for revision**

- A Market Participant has entered a dispute over erroneous formula for MSS Load Following (LF) Deviation Penalty (DP) IIE where the MSS LF resource has been exceptional dispatched. Business rule 5.0 states that Exceptional Dispatch is a component to the MSS LF IIE. The proposed solution is to consume the ED quantity from PCA and use as an input to calculate Supplemental Energy in cases where MSS LF resources have been exceptional dispatched.
- The ISO anticipates implementation of the BPM changes on or about October 25, 2018.

- **Recommendation comments**

- Northern California Power Agency 11/14/18 (ISO response posted 11/26/18)

- **Recommendation comment period expired**

- November 13, 2018

- **Next step**

- Post final decision

Settlements and Billing BPM

Initial Phase PRRs for Discussion

PRR	PRR Title
1098	Updated BPM configuration guide for charge code 8835 annual resource adequacy availability incentive mechanism neutrality to accommodate the removal of the pass through bill hierarchy
1100	Settlement charge codes changes for congestion revenue rights auction efficiency phase 1B initiative
1101	Updates to BPM configuration guides for charge codes 8830 and 8831 to implement resource-level resource adequacy availability incentive mechanism exclusion flags
1102	Updated BPM configuration guide for pre-calculation system resource deemed delivered energy quantity to accommodate energy imbalance market BANC-SMUD initiative relocation of logical meter calculation code from an upstream calculation into settlements
1106	Update settlement input description for dynamic ancillary services obligation flag

PRR 1098 – Updated BPM configuration guide for charge code 8835 annual resource adequacy availability incentive mechanism neutrality to accommodate the removal of the pass through bill hierarchy

- **Reason for revision**

- Defect 59019 was opened up to address the fact that the existing PTB PTB_RAAIM_NTRL_ALLOC_ADJ_AMT which is part of the PTB hierarchy does not have its variable name listed in the BPM under 3.6 Inputs-External Systems. The PTB hierarchy will be terminated as well as the PTB that was the focus of the defect. We will introduce an additional new PTB at the BA level. We will sum over the BA_ID in the charge code section and sum it with the two existing PTBs. This impacts CC 8835.
- The ISO anticipates implementation on or about 12/19/2018, with an effective date of 11/1/2016.

- **Initial comments**

- No initial comments submitted

- **Initial comment period expired**

- November 16, 2018

- **Next step**

- Post recommendation

PRR 1100 – Settlement charge codes changes for congestion revenue rights auction efficiency phase 1B initiative

- **Reason for revision**

- The charge code changes implement CRR Auction Efficiency Phase 1B initiative from Settlements perspective.
- The ISO anticipates implementation of the BPM changes on or about Dec 19, 2018, with effective date 1/1/2019 in time for Year 2019 CRR settlement.

- **Initial comments**

- No initial comments submitted

- **Initial comment period expired**

- November 16, 2018

- **Next step**

- Post recommendation

PRR 1101 – Updates to BPM configuration guides for charge codes 8830 and 8831 to implement resource-level resource adequacy availability incentive mechanism exclusion flags

- **Reason for revision**

- To facilitate ad-hoc adjustments to RAIM settlements, we are implementing a flag to allow Settlements Production to manually exempt resources from monthly RAIM calculations without having to estimate the RAIM settlement amounts first. This will streamline and increase the accuracy of RAIM adjustments due to system or payload issues. There will be two flags, one for Generic and one for Flex RA. The flags are monthly and at the resource level.
- The planned production deployment date is 12/19/2018 with a 5/1/2018 effective date.

- **Initial comments**

- No initial comments submitted

- **Initial comment period expired**

- November 16, 2018

- **Next step**

- Post recommendation

PRR 1102 – Updated BPM configuration guide for pre-calculation system resource deemed delivered energy quantity to accommodate energy imbalance market BANC-SMUD initiative relocation of logical meter calculation code from an upstream calculation into settlements

- **Reason for revision**

- The EIM BANC-SMUD Initiative requires that Logical Meter Calculation code be moved from an upstream calculation into Settlements. Settlements will now map PISOA five minute telemetry data, in order to derive an Allocation factor which will then be multiplied against a CISO dynamic system resources ‘Checkout’ quantity, so to derive the LMC which is itself currently derived by an upstream system. This impacts PC System Resource Deemed Delivered Energy Quantity.
- The effective trade date is 1/1/2019 and the anticipated implementation date is 12/19/2018.

- **Initial comments**

- No initial comments submitted

- **Initial comment period expired**

- November 16, 2018

- **Next step**

- Post recommendation

PRR 1106 – Update settlement input description for dynamic ancillary services obligation flag

- **Reason for revision**

- This language only change clarifies the flag input for dynamic AS obligation, BAResourceDynamicASObligationFlag, which is associated with bill determinant name BA_DAY_RSRC_DYN_AS_OBLIG_FLG.
- Production data changes will happen around 11/9/2018.

- **Initial comments**

- No initial comments submitted

- **Initial comment period expired**

- November 20, 2018

- **Next step**

- Post recommendation

Congestion Revenue Rights BPM Initial Phase PRRs for Discussion

PRR	PRR Title
1105	Congestion Revenue Rights 1B changes and settlement rule attachment

PRR 1105 – Congestion Revenue Rights 1B changes and settlement rule attachment

- **Reason for revision**
 - To describe changes to CRR settlement process associated with CRR 1B policy changes. In addition the Settlement Rule section from the BPM for Market Operations is being moved to the BPM for Congestion Revenue Rights as Attachment 'I'
- **Initial comments**
 - No initial comments submitted
- **Initial comment period expired**
 - November 19, 2018
- **Next step**
 - Post recommendation

Reliability Requirements BPM

Initial Phase PRRs for Discussion

PRR	PRR Title
1103	Submitted by San Diego Gas & Electric Company: Reliability requirement update for consistency and cleanup

PRR 1103 – Submitted by San Diego Gas & Electric Company, Reliability requirement update for consistency and cleanup

- **Reason for revision**
 - Current BPM language is inconsistent with previous PRRs.
- **Initial comments**
 - ISO submitted a Comment 11/13/18
- **Initial comment period expired**
 - November 16, 2018
- **Next step**
 - Post recommendation

Outage Management BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1088	Nature of Work attributes and force outages with $P_{max} < 10$

PRR 1088 – Nature of Work attributes and force outages with $P_{max} < 10$

- **Reason for revision**
 - Updates to NoW for annual use limit reached, monthly use limit reached, other use limit reached, short term use limit reached. Updates for reporting of forced outages with a $P_{max} < 10$
- **Recommendation comments**
 - No recommendation comments submitted
- **Recommendation comment period expired**
 - November 13, 2018
- **Next step**
 - Post final decision

Managing Full Network Model BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1091	Emergency: Enhanced gas nomogram constraint formulation for Aliso Canyon

PRR 1091 – Emergency: Enhanced gas nomogram constraint formulation for Aliso Canyon

- **Reason for revision**
 - This additional language is to reflect the enhanced formulation for the gas nomograms that may be activated when the ISO call for the Aliso Canyon provisions. The enhanced formulation is adjusting the gas nomogram constraint by a factor of 100 to have it in a similar treatment to transmission constraints enforced in the market. Effective Feb 20, 2018
- **Recommendation comments**
 - No recommendation comments submitted
- **Recommendation comment period expired**
 - November 13, 2018
- **Next step**
 - Post final decision

Energy Imbalance Market BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1090	Dynamic pseudo-tie wheeling schedules
1093	Emergency: Enhancement for calculating fifteen-minute schedules from hourly resources

PRR 1090 – Dynamic Pseudo-Tie Wheeling Schedules

- **Reason for revision**
 - This change is to provide clarity for EIM entities scheduling practices related to dynamic pseudo-tie wheeling schedules.
- **Recommendation comments**
 - No recommendation comments submitted
- **Recommendation comment period expired**
 - November 13, 2018
- **Next step**
 - Post final decision

PRR 1093 – Emergency: Enhancement for calculating fifteen minute schedules from hourly resources

- **Reason for revision**

- This is for an enhancement to modify the calculation logic for the Fifteen-Minute Schedules from hourly resources. The change is explained in a new section 11.3.13. Additionally, we added a clarification in section 16.2.1.1.4 in regards to Energy Transfer System Resource (ETSR) treatment of tagged quantities where EIM BAAs paring includes the ISO BAA. Effective Date: Fall 2

- **Recommendation comments**

- No recommendation comments submitted

- **Recommendation comment period expired**

- November 13, 2018

- **Next step**

- Post final decision

Market Operations BPM

Recommendation Phase PRRs for Discussion

PRR	PRR Title
1087	Generator contingency and remedial action scheme modeling
1095	Pay for performance regulation recertification process change

PRR 1087 – Generator contingency and remedial action scheme modeling

- **Reason for revision**

- This is to enhance the Day Ahead and Real Time markets to represent constraints impacted by generator contingencies and Remedial Action Scheme (RAS) operation within the market by modeling the generation/load loss in the dispatch, and the transmission loss along with subsequent generation/load loss due to RAS operation in the dispatch.

- **Recommendation comments**

- No recommendation comments submitted

- **Recommendation comment period expired**

- November 13, 2018

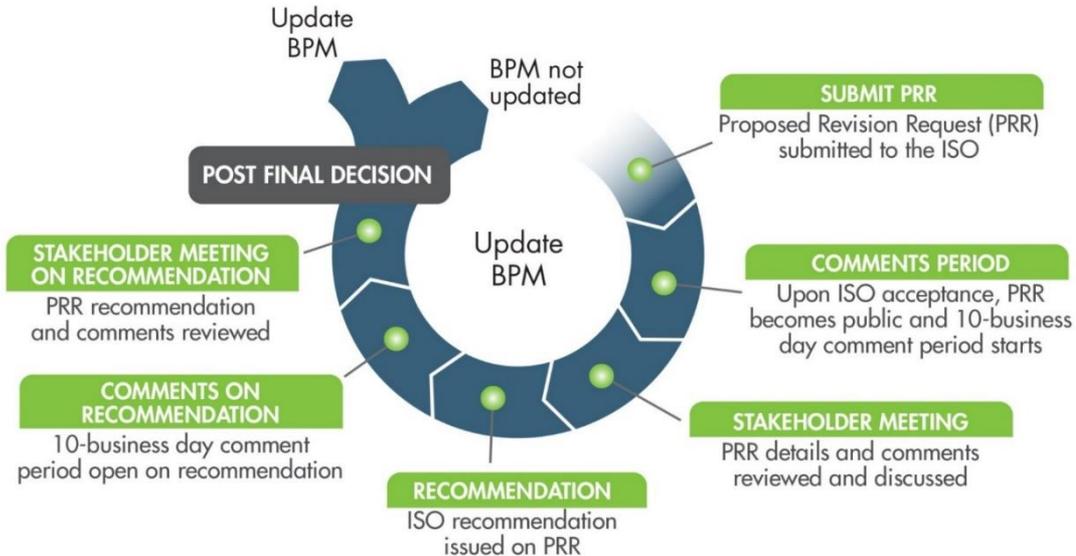
- **Next step**

- Post final decision

PRR 1095 – Pay for performance regulation recertification process change

- **Reason for revision**
 - This is to clarify the changes in the methodology for resource recertification. Effective date: January 1, 2019.
- **Recommendation comments**
 - No recommendation comments submitted
- **Recommendation comment period expired**
 - November 13, 2018
- **Next step**
 - Post final decision

Next BPM Monthly Meeting: Tues., December 18, 2018 @ 11 a.m.



BPM change management Process Questions:

Julia Payton
916-608-1133
BPM_CM@caiso.com



Sign up for the
Daily Briefing at
www.caiso.com