



BPM Change Management Meeting

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September 30, 2021

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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.

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- 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.

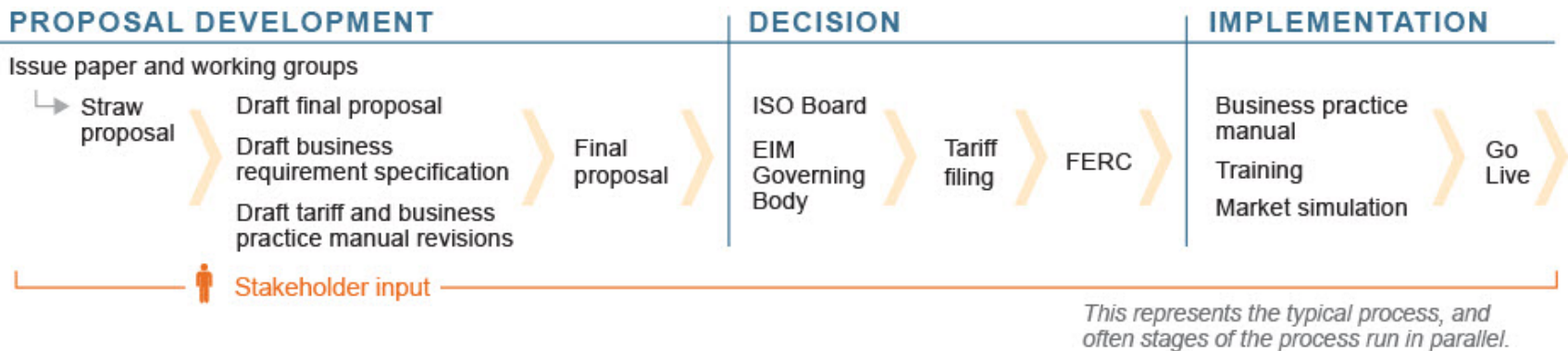
Agenda – BPM Change Management Meeting

September 30, 2021

Topic	Presenter
Introduction / Meeting Overview	Isabella Nicosia
Discussion of active proposed changes: Market Operations BPM Market Instruments BPM Energy Imbalance Market BPM Direct Telemetry BPM Transmission Planning Process BPM Managing Full Network Model BPM Candidate CRR Holder Registration BPM Settlements and Billing BPM	Jamal Batakji Jamal Batakji Jamal Batakji Priyanka Namburi Jeff Billinton Vivian Liang Nicole Hines Brenda Corona
Wrap-Up and Next Steps	Isabella Nicosia

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.*

Market Operations BPM

PRR	PRR Title	Stage
1382	Energy storage and distributed resources phase 4 updates related to market operations BPM	Initial
1371	Persistence forecast enhancement	Initial

PRR 1382 – Energy storage and distributed resources phase 4 updates related to market operations BPM

- Reason for revision
 - This is to enhance the ability of Energy Storage and Distributed Resources to participate in the ISO market. One document, we added a new paragraph describing the end of hour state of charge bid parameter in real time market. In the second document we provided some edits to section 6.5.4 and referenced all DEB related topics to attachment D in Market Instruments BPM.
 - Target Date: 11/1/21
- Initial comments:
 - No comments submitted to date
- Initial comment period expires:
 - October 19, 2021
- Next step:
 - Initial comments due

PRR 1371 – Persistence forecast enhancement

- Reason for revision
 - This is to address operational concerns during a time a renewable resource is onboarding.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

Market Instruments BPM

PRR	PRR Title	Stage
1381	Energy storage and distributed resources phase 4 updates related to market instrument BPM	Initial

PRR 1381 – Energy storage and distributed resources phase 4 updates related to market instrument BPM

- Reason for revision
 - This is to enhance the ability of Energy Storage and Distributed Resources to participate in the ISO market. This includes enhancement to the Default Energy Bids calculations for the storage resources related to energy costs, variable costs, and price based opportunity costs.
 - Target Date: 11/1/21
- Initial comments:
 - No comments submitted to date
- Initial comment period expires:
 - October 19, 2021
- Next step:
 - Initial comments due

Energy Imbalance Market BPM

PRR	PRR Title	Stage
1368	Unaccounted for energy settlement election process	Initial

PRR 1368 – Unaccounted for energy settlement election process

- Reason for revision
 - This is a new process related to Unaccounted For Energy Settlement election. This is detailed in section 2.4 of the EIM BPM. The code delivery is on November 1st, 2021, but the election notice is due prior to the code delivery. For 2021 election year, the entities need to submit the UFE Election Letter by 9/30/21. For 2022 election year, the deadline is 10/31/21.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

Direct Telemetry BPM

PRR	PRR Title	Stage
1380	High sustainable limit	Initial
1369	Update to the maximum continuous energy limit battery point definition	Initial

PRR 1380 – High sustainable limit

- Reason for revision
 - Sections 6.1, 8.4.2 and 14.1 have been updated to include new Telemetry requirements related to the Hybrid Resources initiative.
- Initial comments:
 - No comments submitted to date
- Initial comment period expires:
 - October 19, 2021
- Next step:
 - Initial comments due

PRR 1369 – Update to the maximum continuous energy limit battery point definition

- Reason for revision
 - The Maximum Continuous Energy Limit is a telemetered value which is not used in the market, and therefore should not be bound by the limit in the ISO Master File.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

Transmission Planning Process BPM

PRR	PRR Title	Stage
1379	Changes to section 10.4.5 schedule of request/deadline	Initial

PRR 1379 – Changes to section 10.4.5 schedule of request/deadline

- Reason for revision
 - Need to delay schedule for generator modeling of phase 6 and subsequent phases.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

Managing Full Network Model BPM

PRR	PRR Title	Stage
1370	Utilize a nomogram to manage unscheduled flow events in real-time dispatch	Initial

PRR 1370 – Utilize a nomogram to manage unscheduled flow events in real-time dispatch

- Reason for revision
 - This revision includes the change in Section 2.1.1.2 to align the BPM with updated contract obligations under the COI Path Operator Agreement and inform market participants that a flow constraint will be enforced on the California-Oregon Intertie (COI) during a Unscheduled Flow (USF) event in Real-Time Dispatch (RTD). The change will allow RTD to support the relief obtained by the regional USF procedure.
 - The effective date will be 9/1/2021.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

Candidate CRR Holder Registration BPM

PRR	PRR Title	Stage
1365	Updating congestion revenue rights holder registration for document submission and formatting	Initial

PRR 1365 – Updating congestion revenue rights holder registration for document submission and formatting

- Reason for revision
 - Revisions were made for new CIDI submission process and correcting formatting to BPM.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

Settlements and Billing BPM

PRR	PRR Title	Stage
1378	Updated CC 64770 real time imbalance energy offset energy imbalance market to accurately and properly align with non-California balancing authority areas will get greenhouse gas adjustments	Initial
1377	Update configuration guides to reflect settlement of exceptional dispatches designated as TMODEL8 and TMODEL9	Initial
1376	Update configuration guides to reflect Western Area Power Administration transmission exchange agreement treatment	Initial
1374	Updated multiple BPM configuration guides to accommodate the inertia shadow pricing resolution initiative	Initial

Settlements and Billing BPM

PRR	PRR Title	Stage
1373	Updated multiple BPM configuration guides to accommodate the real time settlement review - phase 2 initiative	Initial
1372	To support the energy storage distributed energy resources phase 4 initiative, configuration changes are needed to update the settlement of bid cost recovery for non- regulation energy management limited energy resources to align with the initiative	Initial
1366	Updated charge code 6456 intertie deviation settlement to exempt hour ahead scheduling process market disruption intervals from intertie deviation settlement penalty assessment	Initial

PRR 1378 – Updated CC 64770 real time imbalance energy offset energy imbalance market to accurately and properly align with non-California balancing authority areas will get greenhouse gas adjustments

- Reason for revision
 - Configuration change modifying the GHG price used to calculate the OA portion of the GHG adjustment within the EIM real time imbalance energy offset charge code 64770. This update ensures that only non-CA BAAs will get GHG adjustments.
 - The effective date of the changes is 8/1/2019 and the anticipated implementation date is 10/27/21.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

PRR 1377 – Update configuration guides to reflect settlement of exceptional dispatches designated as TMODEL8 and TMODEL9

- Reason for revision
 - New exceptional dispatches designations TMODEL8 (competitive group) and TMODEL9 (non-competitive group) have been created. Currently, this will be used for dispatches that involve transmission lines impacting Valley Electric Association (VEA) and Gridliance. This new exceptional dispatch (ED) type designations will be used for the settlement and cost allocations involving these companies.
 - Configuration guides as listed above have been updated to reflect the changes.
 - The changes are to be deployed around October 27, 2021. The effective date will be Trade Date 11/1/2021.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

PRR 1376 – Update configuration guides to reflect Western Area Power Administration transmission exchange agreement treatment

- Reason for revision
 - There is a need to resolve ongoing settlement disputes from Western Area Power Administration (WAPA) regarding its Transmission Exchange Agreement with CAISO and PG&E. This treatment is specific to the mentioned agreement, which exempts certain WAPA schedules from a range of settlement charges that would otherwise apply. There will be an update to WAPA's transmission contract entitlement in relation to transmission contract use after the Day-Ahead market. Further, specific exemption (neither charged nor paid) for flexible ramp product is also applied, in relation to the mentioned agreement.
 - System changes are not required for market participants aside from WAPA.
 - Configuration guides as listed above have been updated for documentation to reflect the changes.
 - The changes are to be deployed around October 27, 2021. The effective date will be Trade Date 11/1/2021.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

PRR 1374 – Updated multiple BPM configuration guides to accommodate the intertie shadow pricing resolution initiative

- Reason for revision
 - This change is made to support the Intertie Shadow Pricing Resolution initiative. More specifically, the changes are:
 - To resolve the issues related to intertie shadow pricing including labeling and mapping of the intertie shadow prices.
 - This change will be deployed on 10/27/2021, and effective on 11/1/2021.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

PRR 1373 – Updated multiple BPM configuration guides to accommodate the real time settlement review - phase 2 initiative

- Reason for revision
 - This change is made to support the Real Time Settlement Review - Phase 2 initiative. This change is necessary to implement the CAISO proposed changes in the Tariff. More specifically, The changes for Real Time Settlements Review – Phase 2 are:
 - To allow EIM entities using a load derivation approach the option not to settle unaccounted for energy (UFE).
 - This change will be deployed on 10/27/2021, and effective on 11/1/2021.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

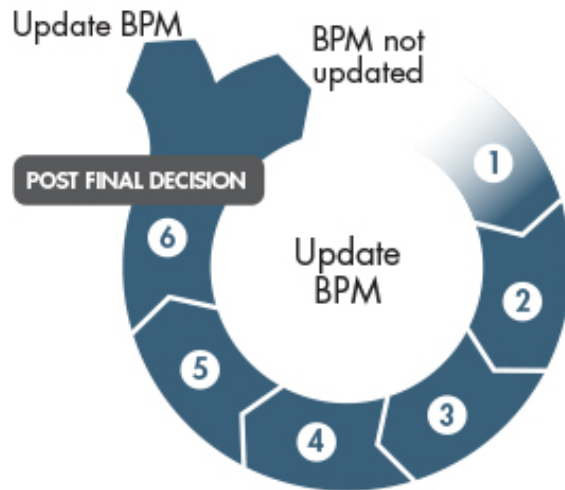
PRR 1372 – To support the energy storage distributed energy resources phase 4 initiative, configuration changes are needed to update the settlement of bid cost recovery for non- regulation energy management limited energy resources to align with the initiative

- Reason for revision
 - As part of the ESDER 4 initiative, NREM LESRs that utilize the new End of Hour State of Charge biddable parameter or Real Time Self Schedules will be ineligible for RTM Bid Cost Shortfall in the hour of the parameter or schedule, as well as the hour preceding the parameter or schedule.
 - This requires changes to the RTM Net Amount Pre-Calculation configuration guide to identify the impacted hours for the calculation of Bid Cost Recovery.
 - The planned production deployment date is 10/27/2021 with an 11/1/2021 effective date.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

PRR 1366 – Updated charge code 6456 inertia deviation settlement to exempt hour ahead scheduling process market disruption intervals from inertia deviation settlement penalty assessment

- Reason for revision
 - Through the dispute process, an issue was identified where during HASP market disruption intervals, the IDS charge code was calculating penalties based on 0 HASP schedules. The 0 values does not accurately represent the actual instructions followed by market participants. The solution is to exempt HASP market disruption intervals from IDS penalty assessment.
 - Inconsistencies between Tariff language and Settlement Configuration were identified. The IDS quantity calculation for HB resources needed to be adjusted for it to be strictly the difference between HASP schedule and after-the-fact energy profile tag. The IDS pricing logic of 75% of the greater between FMM and RTD LMP for when a resource accepts their award but does not deliver the energy is adjusted to only apply to under delivery. Reliability Curtailment exemption is adjusted to only be applied to under delivery.
 - The effective date of the changes is 2/1/2021 and the anticipated implementation date is 10/27/21.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - September 15, 2021
- Next step:
 - Post recommendation

Next BPM PRR Review Monthly Meeting: October 26, 2021 @ 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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