



BPM Change Management Meeting

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September 25, 2018

Agenda – BPM Change Management Meeting

September 25, 2018

Topic	Presenter
Introduction / Meeting Overview	Julia Payton
Discussion of active BPM proposed changes: Congestion Revenue Rights Energy Imbalance Market Generator Management Generator Interconnection and Deliverability Allocation Procedures Reliability Requirements Settlements and Billing	Jacob Fox / Jim McClain Jamal Batakji Jill Jordan / Debi Le Vine Phelim Tavares Kyle Woody / Gautham Katta Jennifer Kwong
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.*

Congestion Revenue Rights BPM Initial Phase PRRs for Discussion

PRR	PRR Title
1083	Updates due to FERC Order on congestion revenue rights 1A policy change

PRR 1083 – Updates due to FERC Order on congestion revenue rights 1A policy change

- **Reason for revision**

- Revisions to reflect changes to source/sink bidding pairs in the action and to describe the new sell feature being implemented. CRR 1A Auction Efficiency policy initiative..

- **Initial comments**

- Pacific Gas and Electric Company 9/18
- Six Cities 9/18

- **Initial comment period expired**

- September 18, 2018

- **Next step**

- Post recommendation

Energy Imbalance Market BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1072	Clarification to section 11.3.12.2

PRR 1072 – Clarification to section 11.3.12.2

- **Reason for revision**
 - This is due to EIM Enhancement 2018 project requirements where the market will not procure flexible ramping up and flexible ramping down capacity when any EIM balancing authority is undergoing a contingency. Expected effective date is Fall 2018.
- **Recommendation comments**
 - No comments submitted
- **Recommendation comment period expired**
 - September 18, 2018
- **Next step** Post final decision

Energy Imbalance Market BPM Initial Phase PRRs for Discussion

PRR	PRR Title
1082	Emergency: Energy imbalance market variable energy resource forecasting

PRR 1082 – Energy imbalance market variable energy resource forecasting

- **Reason for revision**
 - This is to extend the persistence forecast modeling to EIM entities.
- **Initial comments**
 - No comments submitted
- **Initial comment period expired**
 - September 18, 2018
- **Next step**
 - Post recommendation

Energy Imbalance Market BPM Initial Phase PRRs for Discussion

PRR	PRR Title
1085	Energy imbalance market greenhouse gas enhancements

PRR 1085 – Energy imbalance market greenhouse gas enhancements

- **Reason for revision**

- This is due to the EIM Greenhouse Gas Enhancements policy to limit EIM participating resources' greenhouse gas bid quantity to the MW value between the EIM participating resource's base schedule and the resource's upper economic level.

- **Initial comments**

- Idaho Power Company 9/19
- ISO response posted 9/21

- **Initial comment period expired**

- September 24, 2018

- **Next step**

- Post recommendation

Generator Management BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1073	As-built requirements – new section 11

PRR 1073 – As-built requirements – new section 11

- **Reason for revision**
 - We are providing clarification to the existing section 5.10.3 of the Generator Interconnection Agreement requiring submission of as-built drawings, information and documents within 120 days of Commercial Operation. See Tariff section 37.6.1.
- **Recommendation comments**
 - No comments submitted
- **Recommendation comment period expired**
 - September 18, 2018
- **Next step** Post final decision

Generator Interconnection and Deliverability Allocation BPM, Initial Phase PRRs for Discussion

PRR	PRR Title
1084	Updating language for repayments of reliability network upgrades with congestion revenue rights

PRR 1084 – Updating language for repayments of reliability network upgrades with congestion revenue rights

- **Reason for revision**
 - This revision provides reference to the new clarifying language added in Section 14 of the CRR BPM.
- **Initial comments**
 - No comments submitted
- **Initial comment period expired**
 - September 21, 2018
- **Next step**
 - Post recommendation

Reliability Requirements BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1074	Unpermitted forced outages

PRR 1074 – Unpermitted forced outages

- **Reason for revision**
 - The reason for this PRR is to prevent resources from not fulfilling their substitution responsibilities and to not submit unpermitted forced outages.
- **Recommendation comments**
 - Pacific Gas and Electric Company 9/20
- **Recommendation comment period expired**
 - September 18, 2018
- **Next step**
 - Post final decision

Reliability Requirements BPM

Initial Phase PRRs for Discussion

PRR	PRR Title
1086	Update intra-month competitive solicitation process offer submission timeline

PRR 1086 – Update intra-month competitive solicitation process offer submission timeline

- **Reason for revision**
 - The revisions will provide the ISO additional time to review offers for capacity procurement mechanism.
- **Initial comments**
 - No comments submitted
- **Initial comment period expired**
 - September 24, 2018
- **Next step**
 - Post recommendation

Reliability Requirements BPM Initial Phase PRRs

PRR	PRR Title
1075	Updates to existing BPMs to implement commitment cost enhancements phase 3 (CCE3) initiative
1076	Settlements configuration and BPM updates to conform with changes due to the 2018 CAISO Tariff clarifications filing process
1077	Update settlement charge codes for energy storage and distributed energy resource phase 2 initiative
1078	Updates to BPM configuration guide for pre-calculation resource adequacy availability incentive mechanism related to non-generator resource regulation energy management resources and calculation of the weight factor
1079	Update settlement charge codes input description for congestion revenue rights auction efficiency phase 1A initiative
1080	Remove utility distribution company attribute from marginal congestion cost for fifteen minute market and real time dispatch
1081	Update charge code 6477 to allow for system marginal energy cost by balance authority area during administrative pricing event for valuing financial transfer

PRR 1075 – Updates to existing BPMs to implement commitment cost enhancements phase 3 (CCE3) initiative

- **Reason for revision**

- The revisions are due to the implementation of CCE3 Initiative. Validation of use limitations is no longer required in the RAIM Precalc. The SUC MLC Precalc is also updated to remove formulas related to this removed validation.
- The ISO anticipates implementation on or about 10/24/18 in order to support a 5/1/18 effective trade date.

- **Initial comments**

- Six Cities 9/18

- **Initial comment period expired**

- September 18, 2018

- **Next step**

- Post recommendation

PRR 1076 – Settlements configuration and BPM updates to conform with changes due to the 2018 CAISO Tariff clarifications filing process

- **Reason for revision**
 - Updates in support of the filed Tariff clarifications Amendment.
 - The ISO anticipates implementation on or about 10/24/18 in order to support a 11/1/18 effective trade date.
- **Initial comments**
 - No comments submitted
- **Initial comment period expired**
 - September 18, 2018
- **Next step**
 - Post recommendation

PRR 1077 – Update settlement charge codes for energy storage and distributed energy resource phase 2 initiative

- **Reason for revision**

- These are the Settlement configuration changes needed to support the Energy Storage and Distributed Energy Resources (ESDER) Phase 2 initiative. As per initiative, the goal is to lower barriers and enhance the ability of transmission grid-connected energy storage and distribution-connected resources to participate in the market. Integration of these resources help lower carbon emissions and add operational flexibility.
- The ISO anticipates implementation on or about 10/24/18 in order to support a 11/1/18 effective trade date.

- **Initial comments**

- No comments submitted

- **Initial comment period expired**

- September 18, 2018

- **Next step**

- Post recommendation

PRR 1078 – Updates to BPM configuration guide for pre-calculation resource adequacy availability incentive mechanism related to non-generator resource regulation energy management resources and calculation of the weight factor

- **Reason for revision**

- The changes are the result of a reported defect per CIDI ticket #204579.
- The RAAIM Precalc was not properly calculating Day-Ahead and Real Time availability for NGR-NREM resources per Tariff sections 40.6.1.1(b)(1) and 40.6.2(e)(1).
- The original implementation of the Weight Factor failed to consider RAAIM exemptions specific to Generic and/or Flex per Tariff section 40.9.2
- The planned production deployment date is 10/24/2018 with an 11/1/2016 effective date.

- **Initial comments**

- No comments submitted

- **Initial comment period expired**

- September 18, 2018

- **Next step**

- Post recommendation

PRR 1079 – Update settlement charge codes input description for congestion revenue rights auction efficiency phase 1A initiative

- **Reason for revision**

- To support the CRR auction efficiency initiative, the common data input description, allowing for both buy and sell transactions types for CRR auction transaction has been updated. This change is described in the data input description for CC 6798 and CC 6799.
- The ISO anticipates implementation on or about 10/24/18 in order to support a 11/1/18 effective trade date.

- **Initial comments**

- No comments submitted

- **Initial comment period expired**

- September 18, 2018

- **Next step**

- Post recommendation

PRR 1080 – Remove utility distribution company attribute from marginal congestion cost for fifteen minute market and real time dispatch

- **Reason for revision**

- This is an input mapping clean-up of an unnecessary attribute (UDC attribute) in the calculation of congestion revenues in FMM and RTD.
- The ISO anticipates implementation of the BPM changes on or about October 24, 2018, with effective date 11/1/2018.

- **Initial comments**

- No comments submitted

- **Initial comment period expired**

- September 18, 2018

- **Next step**

- Post recommendation

PRR 1081 – Update charge code 6477 to allow for system marginal energy cost by balance authority area during administrative pricing event for valuing financial transfer

- **Reason for revision**

- The current financial value transfer calculation allows only for a single global SMEC price in valuing financial transfer. However, during an administrative pricing event, no SMEC data from the market would exist. The current Tariff provisions the use of administrative pricing based on each Balancing Authority Area's OATT price and is BAA specific - sections 7.7.3, 7.7.9, and 29.7(j)(2)(D).
- The resolution is to update configuration to allow for SMEC price per BAA, so that a BAA specific administrative pricing during such event can be used.
- The ISO anticipates implementation of the BPM changes on or about October 24, 2018, with effective date 11/1/2018.

- **Initial comments:**

- No comments submitted

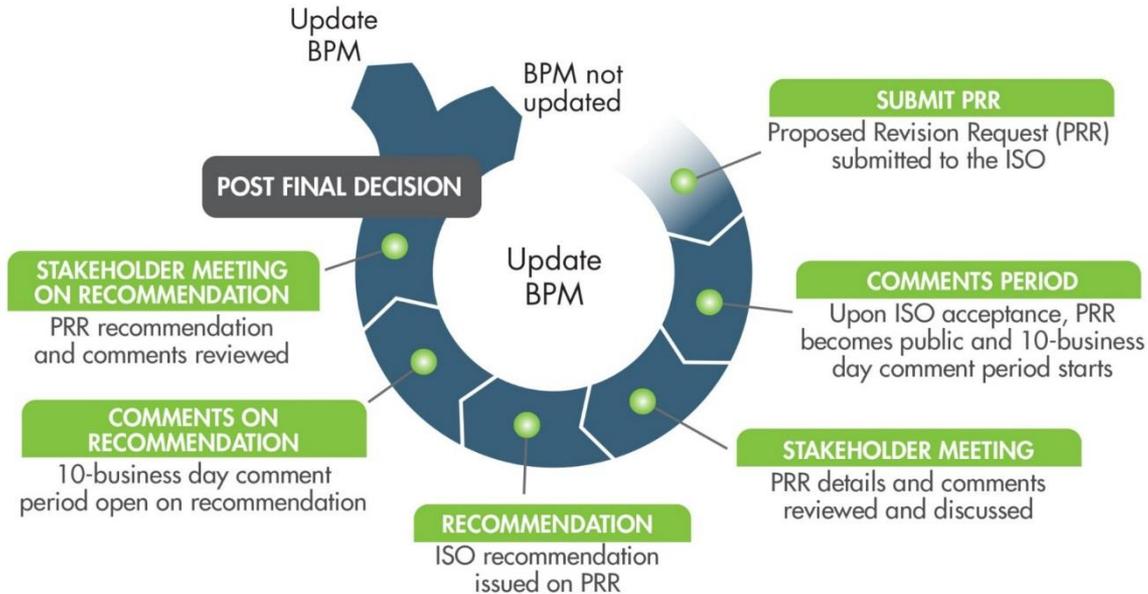
- **Initial comment period expired:**

- September 18, 2018

- **Next step:**

- Post recommendation

Next BPM Monthly Meeting: Tuesday, Oct. 23, 2018 @ 11 a.m.



BPM change management Process Questions:

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