Transmission Service and Market Scheduling Priorities Phase 2 (TSMSP 2)

Track 1 – Monthly Process

Today’s Trainer

Dottie Vance
Customer Readiness Trainer
Housekeeping

REMAIN MUTED
Keep yourself muted to minimize background noise

ASKING QUESTIONS
Unmute to ask verbal questions or write in the chat pod

RAISING HAND
Raise your hand using WebEx interactivity tools

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Our Meeting Agenda

Today we will cover...

- Review the background on the project
- Understand and walkthrough the application-specific details
- Prepare for Market Simulation and Readiness Activities
WHY ARE WE HERE?

For the wheeling-through scheduling priorities, the need arises as supply shortfalls across the western interconnection are contributing to increased dependence on import generation to serve load reliably.

Need: A workable framework for establishing market scheduling priority for wheeling-through the ISO system is a critical issue for external and internal load serving entities.
NEW PROCESS FOR ESTABLISHING WHEELING THROUGH PRIORITY

• Available Transfer Capability (ATC) is secured in advance on the ISO interties to establish wheeling through priority equal to ISO load.
  ○ ATC can be reserved in
    ▪ Monthly increments (13-month horizon)
    ▪ Daily increments (7-day horizon).

• Wheeling through transactions without secured ATC in advance will have a lower market clearing priority.
For additional details, refer to the Policy Initiative Page for Transmission Service and Market Scheduling Priorities [link](#)!
Review Application
Specific Details
What is webWheel?

01 New ISO Application

To access webWheel, users will need to have a proper certificate & register in MF.

This application shows user specific data (e.g., provisioned information)

02 This platform will be where participants:

- Submit and maintain power contracts
- Request Priority-Wheeling-Through (PWT)
- View/Validate PWT Awards

The link for webWheel will be located on the Market Participant Portal (prior to Market Simulation)
Master File (MF)

Section Focus

- Required actions for users in Master File
Users Have Two Options for Action Items in Master File

Need to Register
To access the new application (webWheel), users must first register in Master File:

- PT_WHEEL_SCHED = Y
- PT_WHEEL_MW is not needed

Timeline: 11 business days in advance to start

Alcohol Registered
- Previously registered resources will remain
- The ISO will clear out previous PT_WHEEL_MW from TSMSP 1 entries
- Users can move forward with webWheel

New Intertie Resource Request template
Access and Identity Management (AIM)

Section Focus

• Certificate access for new application (webWheel)
Existing Scheduling Coordinators (SC) AIM Contracts

• SC Contract Types:
  – Scheduling Coordinator Agreement + MSA/SC
  – SCT – Scheduling Coordinator Agreement Only

• Associated Applications and Roles:
  – WEBWHEEL-OATI-WEBWHEEL READ ONLY
  – WEBWHEEL-OATI-WEBWHEEL READ/WRITE
What Questions Do You Have?

Unmute yourself  or  Raise your hand
Section Focus

- Overview of participant dashboard and data tab
- Walk through submitting a power contract, requesting priority-wheeling-through (PWT), and reviewing priority-wheeling-through awards (PWT Awards).
Reviewing webWheel Application

PARTICIPANT DASHBOARD & DATA TAB
Submission Window Status provides summary of where the submission process is at.

Open = PWT Requests are open
Lock = Submissions are closed
Award = Process for awarding requests
Published = Information published downstream
News and Announcements

This area provides different messages to users letting them know what is happening.
Activity Log

This area is similar to "News and Announcements" as it provides updates on what actions have taken place.
PWT Request Counts

This area shows participant's requests that have been submitted into the system.
Records Displayed on Participant Dashboard

Records
This area shows the participant's information. Remember, participants are restricted to only seeing their information.
Data Tab – Holidays

Holidays
Products
Participants
Intertie Points
Market Constraints
Intertie Constraint Map
Contracts
Monthly ATC

Holidays
Adhere to North American Electric Reliability Corporation (NERC)
Data Tab – Products

Products
Page that provides overview of the standard energy products organizations can pick from.
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Enabled</th>
<th>System</th>
<th>Hours</th>
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<td>Yes</td>
<td>Monday(7-22), Tuesday(7-22), Wednesday(7-22), Thursday(7-22), Friday(7-22), Saturday(7-22), Sunday(7-22)</td>
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<tr>
<td>124</td>
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<td>Yes</td>
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<tr>
<td>14</td>
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<td>Yes</td>
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</tr>
<tr>
<td>18</td>
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</tr>
<tr>
<td>216</td>
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<td>Yes</td>
<td>Saturday(7-22), Sunday(7-22)</td>
</tr>
<tr>
<td>224</td>
<td>Two weekend days, all hours</td>
<td>Yes</td>
<td>Yes</td>
<td>Saturday(1-24), Sunday(1-24)</td>
</tr>
<tr>
<td>29</td>
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<td>Yes</td>
<td>Yes</td>
<td>Saturday(1-6, 23-24), Sunday(1-6, 23-24)</td>
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<tr>
<td>516</td>
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<td>Yes</td>
<td>Yes</td>
<td>Monday(7-22), Tuesday(7-22), Wednesday(7-22), Thursday(7-22), Friday(7-22)</td>
</tr>
<tr>
<td>524</td>
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<td>Yes</td>
<td>Yes</td>
<td>Monday(1-24), Tuesday(1-24), Wednesday(1-24), Thursday(1-24), Friday(1-24)</td>
</tr>
<tr>
<td>528</td>
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<td>Yes</td>
<td>Yes</td>
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<tr>
<td>616</td>
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</tr>
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</tr>
<tr>
<td>64</td>
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</tr>
<tr>
<td>66</td>
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</tr>
<tr>
<td>RD_12</td>
<td>Any Day, Two hours a day</td>
<td>Yes</td>
<td>No</td>
<td>Monday(23-24), Tuesday(23-24), Wednesday(23-24), Thursday(23-24), Friday(23-24), Saturday(23-24), Sunday(23-24), Holiday(23-24)</td>
</tr>
</tbody>
</table>
Data Tab – Participants

Participants
Summary with Market ID, Name, Effective Data, and Termination Date.
Data Tab – Intertie Points, Market Constraints & Intertie Constraint Map

Intertie Points
This is the Resource ID.

Market Constraints
Provides information on constraints within the Market.

Intertie Constraint Map
Summary of the intertie, market constraint, effective date and termination date.
Data Tab – Contracts

Contracts
Summary of contracts registered in webWheel application.
Data Tab – Monthly Available Transfer Capability (ATC)

Monthly ATC
Summary of how much is available to put into their bids for PWT awards.
Now that you have the basics…

REGISTERING A POWER CONTRACT
Maneuver to the Data Tab → Contracts

Contracts
Summary of contracts registered in webWheel application.
Registering a Power Contract in *webWheel*

<table>
<thead>
<tr>
<th>Data</th>
<th>Operations</th>
<th>Reports</th>
<th>Administration</th>
<th>My Settings</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Dashb...</td>
<td>Contracts</td>
<td><strong>Contract</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### New Contract

- **Name:** Title of contract (the participant decided)
- **Participant:** The ID of who is registering the contract
- **Import & Export Intertie:** Resources desired for this contract

*This category will auto-filter import/export interties registered in Masterfile*
Registering a Power Contract in webWheel (Cont.)

<table>
<thead>
<tr>
<th>Data</th>
<th>Operations</th>
<th>Reports</th>
<th>Administration</th>
<th>My Settings</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Dashb...</td>
<td>Contracts</td>
<td></td>
<td>Contract</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**New Contract**

- **Name:**
- **Participant:**
- **Import Intertie:**
- **Export Intertie:**
- **Product:**
  - 1168
  - 116
  - 124
  - 14
  - 18
  - 216
  - 224
  - 28
  - 29
  - 516
  - 524
  - 58
  - 616
- **Profile Type:**
- **Capacity MW:**

**Product:** Energy contract type desired

**Legal Attestation**

- **Name, Title, Department:**
- **Company:**
- **I attest that this submission meets the requirements of CAISO Tariff Section 23. I declare under penalty of perjury pursuant to 28 U.S.C. 1746 that the foregoing is true and correct.**
- **Signature Name**
Registering a Power Contract in webWheel (Cont.)

New Contract

Name: 
Participant: 
Import Intertie: 
Export Intertie: 
Product: 
Periods: Next Year 2025
Profile Type: Flat
Capacity MW: 

Periodes: Picking for either the Monthly or Daily process

Legal Attestation

Name, Title, Department, Company, with my knowledge and experience given my position with Company, attest that this submission meets the applicable attestation requirements of CAISO Tariff Section 23. I declare under penalty of perjury pursuant to 28 U.S.C. 1746 and the laws of the State of California that I have reviewed these requirements and the foregoing is true and correct.

Signature Name
Registering a Power Contract in the Web Wheel Application

Profile Type: Two options to pick from (Flat or Variable).

Flat The one number value of MWs across the duration of the contract

Capacity MW: How many MWs is desired
Profile Type: Two options to pick from (Flat or Variable).

Variable is the different number values of MWs across the duration of the contract where the contract changes depending on the month.
## Registering a Power Contract in webWheel (Cont.)

<table>
<thead>
<tr>
<th>Data</th>
<th>Operations</th>
<th>Reports</th>
<th>Administration</th>
<th>My Settings</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Dashb.</td>
<td>Contracts</td>
<td>Contract</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### New Contract

- **Name:**
- **Participant:**
- **Import Intertie:**
- **Export Intertie:**
- **Product:**
- **Periods:**
  - Next Year
  - 2025
- **Profile Type:** Flat
- **Capacity MW:** 23

### Additional Attributes

- **Contract Reference:**
- **Counterparty:**

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**Located under Additional Attributes**

**Contact Reference & Counterparty**

Information on where the contract is coming from or if a user would like a counter party be contracted.
Legal attestation: Please be sure to input the Name, Title, Department AND Company in the first box provided.

Once complete, click the save icon at the bottom of the screen.
What Questions Do You Have?

Unmute yourself  or  Raise your hand
After registering power contract

SUBMITTING PWT REQUESTS & VIEWING AWARDS
Once a Participant has Registered a Power Contract & When the Submission Window Opens….

Once the submission window opens, participants will be allowed to enter requests.

2024 Monthly Wheeling Through Priority Request Due Date
Adding a New PWT Request

Click the "new" icon to add a PWT Request
## Creating PWT Request

<table>
<thead>
<tr>
<th>Data</th>
<th>Operations</th>
<th>Reports</th>
<th>Administration</th>
<th>My Settings</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Dashboard</td>
<td>X</td>
<td>PWT Requests</td>
<td>X</td>
<td>PWT Request</td>
<td>X</td>
</tr>
</tbody>
</table>

### PWT Request

| Participant: |  |
| Contract: |  |
| Import Intertie: |  |
| Export Intertie: |  |
| Product: |  |
| Period Type: |  |

- **Periods:** Month Range: 06/2024 - 05/2025
- **Profile Type:**

- **Accept Pro-Rata:** ✓
- **Accept Partial:** ✓

By picking the desired **Participant** and **Contract**, the system will populate the **Import/Export Interties** and the defaulted **Product Type**.
Period Type will be Monthly and the Periods submission can range depending on the desire (up to 12 months range period).
This **Profile Type** is Flat.

Users will be shown their remaining MW and can request the desired amount of MWs to use.
Creating PWT Request (Cont.)

This **Profile Type** is **Variable**.

Users will be prompted to enter their requested MW as it correlates with the desired month.
Accept Pro-Rata and Accept Partial are two check mark boxes users can decide to include in their request.
Clicking Pro-Rata and/or Partial

**PRO-RATA**

- **Yes:** Requests can be awarded up to the requested amount for the evaluation period (subset of MWs)
- **No:** Requests must be awarded for the full amount for the evaluation period

**PARTIAL**

- **Yes:** Requests can be awarded for each period included in the request duration (subset of months)
- **No:** Requests must be awarded the same amount for all periods of the request
Submitting the PWT Request – Status Column

<table>
<thead>
<tr>
<th>ID</th>
<th>Participant</th>
<th>Contract</th>
<th>Import Intertie</th>
<th>Export Intertie</th>
<th>Product</th>
<th>Accept Date</th>
<th>Accept Time</th>
<th>Period Type</th>
<th>Period Start</th>
<th>Period End</th>
<th>Total Hours</th>
<th>Status</th>
<th>Submission Window</th>
</tr>
</thead>
</table>

**Status** column will let participants know if a PWT Request has been 1) Accepted, 2) Awarded, or 3) Rejected.
Reviewing PWT Awards

PWT Awards

No Records Have Been Found
What Questions Do You Have?

Unmute yourself  or  Raise your hand
Customer Interface for Resource Adequacy (CIRA)

Section Focus

• This section is for CAISO BAA LSEs only
• Reviewing how to submit non-RA Contracts in CIRA ‘Historical and new’
New Screen – Native Load Needs (NLN Submission)

To locate this new page:
CIRA >> Plans >> NLN Submissions
Understand Native Load Needs (NLN) Submission Types

Two types of NLN data:

1. NLN1
   - Known as “shown RA contacts”
   - Currently stored in CIRA

2. NLN0
   - Known as “firm non-Resource Adequacy import supply contract”
   - LSEs will enter this information into CIRA
Diving Deeper into the NLN Submission Page

Add/View Future NLN

Clicking this will prompt users to either View or Enter their NLN data.
Adding a Row to the Future NLN Table

Click the “Add” button to create a new row. This page allows LSEs to input their information for future NLN.
Adding a Row to the Future NLN Table (Cont.)

LSEs submit data during designated submission windows

**Example: For November 2024**
- **M+12**: 10/17/2023 – 11/2/2023
- **M+1**: 9/17/2024 to 10/3/2024

<table>
<thead>
<tr>
<th>Month &amp; Year correlate with the desired submission request.</th>
</tr>
</thead>
<tbody>
<tr>
<td>LSE &amp; Tie are drop down options, depending on the user’s resources.</td>
</tr>
</tbody>
</table>

**Replacing RA Contract**, LSEs must provide the Replacement Intertie and MW. Please note that Replacement MW cannot be greater than M+12 MW.
Deleting a Row from Future NLN Table

Select the row you would like to remove and click the “Delete” button – a pop up window will display at the top to confirm the selection.
Diving Deeper into the NLN Submission Page Cont.

**View Historical Data**

Clicking this will prompt users view their historical data.

### Native Load Needs Submission

<table>
<thead>
<tr>
<th>Month: February</th>
<th>Year: 2024</th>
<th>LSE: -Select-</th>
<th>Tier: -Select-</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add/View Future NLN" /></td>
<td><img src="image" alt="Upload Historical Data" /></td>
<td><img src="image" alt="View Historical Data" /></td>
<td><img src="image" alt="Set Asset" /></td>
</tr>
</tbody>
</table>

**California ISO**  
**Customer Interface for Resource Adequacy**

<table>
<thead>
<tr>
<th>Plans</th>
<th>RA Validation</th>
<th>Substitutions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Users will be able to download historical data via CSV, Excel, and PDF.
# Downloaded Historical Data – Template for Uploading Historical Data

## XLS Template

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Title</td>
<td>Tie Name</td>
<td>03/2021</td>
<td>04/2021</td>
<td>05/2021</td>
<td>06/2021</td>
<td>07/2021</td>
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<td>11/2021</td>
<td>12/2021</td>
<td>01/2022</td>
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<td>2</td>
<td>LSE</td>
<td>TIE</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
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</tbody>
</table>

## CSV Template

<table>
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</thead>
<tbody>
<tr>
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<td>Tie Name</td>
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<td>Apr-21</td>
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<td>Jan-22</td>
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</tr>
</tbody>
</table>
Diving Deeper into the NLN Submission Page Cont.

Upload Historical Data

Clicking this will prompt users to upload their historical data (in order to do so, users must check an attestation box).
To upload Historical Data, please refer to how data is downloaded in “View Historical Data” [next slide].

Files must be CSV or Excel format.
Clicking this will prompt users reset filters and clears the data on the User Interface.
What Questions Do You Have?

Unmute yourself  or  Raise your hand
Scheduling Infrastructure and Business Rules (SIBR)

Section Focus

- Recapping user expectations in SIBR
SCs Scheduling Wheeling Remains the Same

• Review: SIBR User Guide Section 3.2.8 Wheeling Bid Walkthrough

What Happens

When it is time to be rewarded PWT, the results are sent to SIBR to be stored and validated

User’s Responsibilities

Participants must validate the resources Import and Export belong to the same contract and that they scheduled for the wheel transaction

There can only be one counter resource per Wheeling Transaction for the trading hour.
Open Access Same-Time Information System (OASIS)

Section Focus

- Review new report “ATC for PWT Requests” for the monthly process
New Report on OASIS, under the Transmission tab called "ATC for PWT Requests"
This report displays calculated initial PWT ATC values and components Priority-Wheeling-Through Awards (PWT), Total Transfer Capability (TTC), Native Load Needs (NLN), and Transmission Reliability Margin (TRM) for Rolling 12-Month period for PWT Requests.

- Current Month + the window

**Tech Specs Posted – OASIS Interface Specification**
The **MONTHLY** group zip will contain the data for selected month (1 Month)
What Questions Do You Have?

- Unmute yourself
- Raise your hand
Settlements

Section Focus

• Review settlement impacts for PWT
Updates to the Wheel Export Quantity PC

• Wheel Export Quantity Pre-calculation modified
  – Resale calculation & original PWT transaction + existing export quantity calculations

• Indirectly impacts
  – High Voltage Wheeling Access Charge allocation (CC 382)
  – Low Voltage Wheeling Access Charge allocation (CC 383)

To review CGPCWHeelExportQuantity Document: Release Planning >> Summer 2024 settlements release technical documents >> Transmission service and market scheduling priorities phase 2
Let’s Walk Through Some Examples Together

An entity registers an **Importing** contract at Point A and an **Exporting** contract at Point B.

There are a few scenarios that could occur with their settlement statements.
Example – Entity usage is less than the awarded PWT capacity

Monthly Awards: 100 MW
Daily Awards: 20 MW
Total Awarded MWs: 120 MW
Schedule: 80 MWs
(did not need 40 of the awarded MWs)

WAC Charge
120 MW

*New requirement that WAC is charged against wheeling-through capacity, if its schedule is less

WAC – Wheeling Access Charge
Example – Entity usage is greater than the awarded PWT capacity

Monthly Awards: 100 MW
Daily Awards: 20 MW
Total Awarded MWs: 120 MW
Schedule: 150 MWs

*(needed an additional 30MWs)*

**WAC Charge**

150 MW

*It is a current practice that WAC is charged against wheeling-through schedules*
Let’s Recap the Settlement’s Examples

In combination of the new requirement and the current practice, the entity should pay the **maximum of the two**:

1. PWT’s awarded capacity
2. PWT’s actual export schedule.

**CG PC Wheel Export Quantity 5.6**
What Questions Do You Have?

Unmute yourself  or  Raise your hand
Market Simulation Activities

Section Focus
- Unstructured Guided Scenarios
TSMSP2 Unstructured Guided Market Sim starts on **March 4, 2024**

- View the [CAISO public calendar](#) for full schedule
- View the scenario on the [Release Planning](#) page

<table>
<thead>
<tr>
<th>Monthly Market Sim</th>
<th>E2E</th>
<th>Map Stage Outage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Month</td>
<td>April</td>
<td>May</td>
</tr>
<tr>
<td>Monthly window duration</td>
<td>3 month</td>
<td>April - June</td>
</tr>
<tr>
<td>CIRA send data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ETCC Send ATC values</td>
<td>Before</td>
<td></td>
</tr>
<tr>
<td>Open Submission Window</td>
<td>submission</td>
<td></td>
</tr>
<tr>
<td>Window</td>
<td>window opens</td>
<td></td>
</tr>
<tr>
<td>Close Submission Window</td>
<td>Wednesday</td>
<td>2/26</td>
</tr>
<tr>
<td>Window</td>
<td>5pm</td>
<td>2/28</td>
</tr>
<tr>
<td>Publish results</td>
<td>Thursday</td>
<td>2/29</td>
</tr>
<tr>
<td>webWheel -&gt; ETCC -&gt; OASIS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Functional Environment Options for CIDI Cases

- Inquiries not directly related to Market Simulation issues & when there is no environment impact
  - Ex. Business Requirements Specifications (BRS) comments, implementation questions, feedback, etc.
  - Contact: release@caiso.com

- Inquires that are related to the MAP-Stage Environments (non-production)
  - Ex. Connectivity, unanticipated simulation results, etc.
  - Contact: MarketSim@caiso.com
What Questions Do You Have?

Unmute yourself  or  Raise your hand
Wrap Up

Summary, Q&A

• What’s happening next.
Tell us How we Did

Takes 3-5 minutes to complete

Helps us improve future training

Link: https://www.surveymonkey.com/r/caisocoursesurvey
Thank you for your participation!

For clarification on anything presented in this training, send an email to: CustomerReadiness@caiso.com

For any other questions or stakeholder specific questions or concerns, please submit a CIDI ticket.
Additional Slides

APPENDIX
Reference Links

Business Practice Manual changes:
BPM Change Management

Business Requirements Specification:

Initiative webpage:
Reference Links

Market Simulation Structured Scenarios:

Technical Specifications – located on the ISO's Developer Site which provides detailed descriptions of the API changes for:
  • OASIS

Training Material: TSMSP1
Getting to know webWheel table features

- New contract
- Filer results
- Column configuration & resetting filters
- Font display
- Display views
- Print
- Download (xlsx or CSV)
- Refresh
SIBR Example of Export/Import

• There can be a one to many association for Export to Import with a PWT position MW. The Export and Import together per hour in the record are unique.
  – ExportA with ImportB for 45MW
  – ExportA with ImportC for 25MW
  – ExportB with ImportA for 30MW
  – ExportC with ImportB for 10MW

• There can only be one counter resource per Wheeling Transaction for the trading hour.

• ExportA can use either ImportB or ImportC but not both for a trade hour.
Scheduling Infrastructure & Business Rules (SIBR) terminology

- The following terms relate to self-schedules submitted in SIBR:
  - PT export [or SS-STD (Self-Schedule Standard) in SIBR UI]:
    - Self-schedule with designated resource
  - LPT export [or SS-LPT in SIBR UI]:
    - Self-schedule with no identified resource
  - PT wheel:
    - Self-scheduled wheel that meets tariff criteria for high priority wheeling through transaction
  - For a refresher, please refer to the Transmission Service and Market Scheduling Priorities Phase 1 (TSMSP1) training

Wheels in SIBR are a bit more complex. The wheel will indicate **SS-STD** from the import side and could be **SS-STD** or **SS-LPT** from the export side. Note: If the wheel is on a registered intertie, the export cannot name a supporting resource.