
	<b>Reliability Coordinator Procedure</b>	<b>Procedure No.</b>	RC0540A
		<b>Version No.</b>	1.0
		<b>Date</b>	12/20/2019
<b>RCW WIT Schedule Change Process</b>		<b>Distribution Restriction: None</b>	

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## Background

This Appendix provides the steps for RCW customers to gain access to the Customer Inquiry Dispute Information (CIDI) application and submit a WIT Schedule Change Request. As the primary means to confirm Net Schedule Interchange (NSI) for Preschedule, next-hour, current-hour, past-hour and past-day checkout, WIT may require a change when editing the E-Tag is not possible. Following the WECC Guideline: WECC Interchange Tool (WIT) Checkout Guidelines, the BA requesting change receives approval from all BAs and TSPs and the WIT Schedule Change Request form is signed by all parties (form on the WECC website, <https://wecc.org/MIC/Pages/ATFWG.aspx>). The requesting BA (sink or source) shall submit a CIDI ticket. In the CIDI ticket, the user shall:

- Attach the WIT Schedule Change Request form that includes all signatures
- Include everyone from the form in the Recipient field to receive emails regarding the status and description and resolution of the request. These recipients include:
  - The WECC ISAS ATFWG chair, [rstatler@wapa.gov](mailto:rstatler@wapa.gov)
  - The RC West WIT administrators ([WITAdminRCW@caiso.com](mailto:WITAdminRCW@caiso.com))
  - The SPP WIT administrators, [dbaker@spp.org](mailto:dbaker@spp.org)

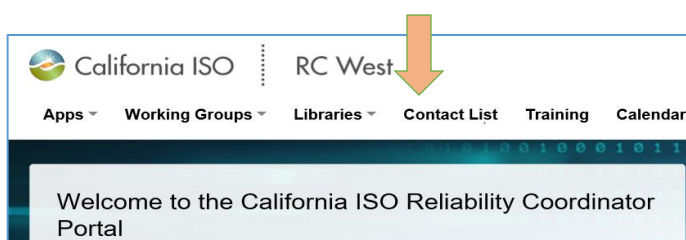
The WIT Admin communicates back to all approving entities (via CIDI) that the schedule change has been made in the WIT.

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## Step 1: Request CIDI application access


In order to submit the WIT Schedule Change request, the participant must have access to the Customer Inquiry Dispute Information (CIDI) application. Access to this application shall be provision in the Access Identity Management (AIM) application by the User Access Administrator (UAA). If you do not know who your UAA contacts are, you can:

- a) Go to RC Portal at <https://rc.caiso.com>, pull up the Contact list here, or:



- b) Contact the ISO Service Desk at (888) 889-0450 and provide your organization's name and they can pull up the UAA information for you.
- c) Request for the UAA to provision their user(s) to the following role for access within 24-48 hrs.: **EXTERNAL IMS READ-WRITE** If you do not have access to the RC portal, please work with your UAA to provision access to **RCSFE** in the Access Identify Management (AIM) tool.
- d) If the user **has an existing ISO CMA certificate**, the CIDI application will be automatically added to the user's profile.
- e) If the user **requires a new certificate**, the user will receive an email notification with instructions on how to register and install their certificate.

Once the user has access to the application, they can go to the [Market Participant Portal](#) to access CIDI using Internet Browser Options Internet Explorer 11 (IE 11) or Google Chrome. General instructions on how navigate through the application can found in the **CIDI User Guide**: [http://www.caiso.com/Documents/NewCustomerInquiry\\_DisputeandInformation\\_CIDI\\_UserGuide.pdf](http://www.caiso.com/Documents/NewCustomerInquiry_DisputeandInformation_CIDI_UserGuide.pdf)

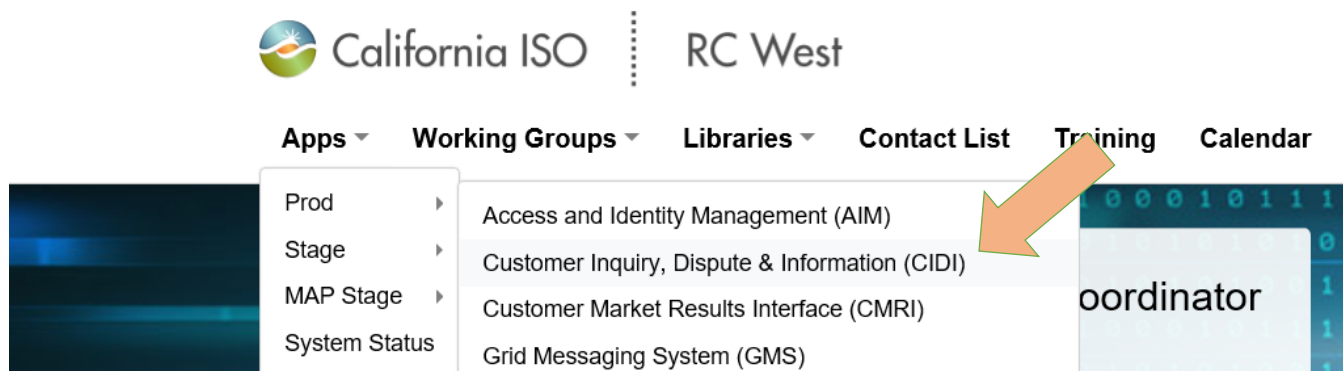
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## Step 2: Submit Request in WIT Schedule Change request in CIDI

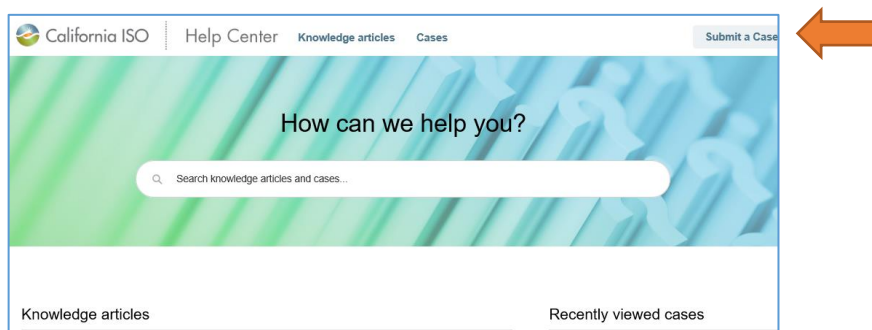
Before submitting a CIDI ticket for a WIT Schedule Change request, All signatures must be included and confirmed by the requesting BA in the **WIT Schedule Change Request Form**.


Follow the WECC Guideline: WECC Interchange Tool (WIT) Checkout Guidelines and the WECC ATF (After-the-Fact) Tagging Guideline to fill out the WIT Schedule Change Request Form. <https://www.wecc.org/MIC/Pages/ATFWG.aspx>

- a) Once CIDI access has been granted and the WIT Schedule Change Request Form is accurately completed and necessary signatures included, you can go to the RC portal <https://rc.caiso.com> and click on **Apps >> Prod >> CIDI**

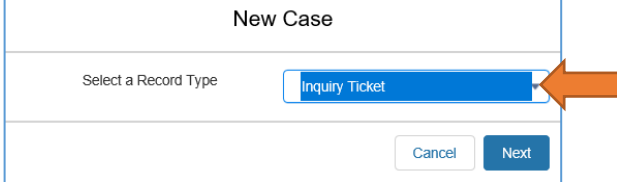


- b) Log into CIDI and click on the **Submit a Case** button



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Next, select the **Inquiry Ticket** record type.

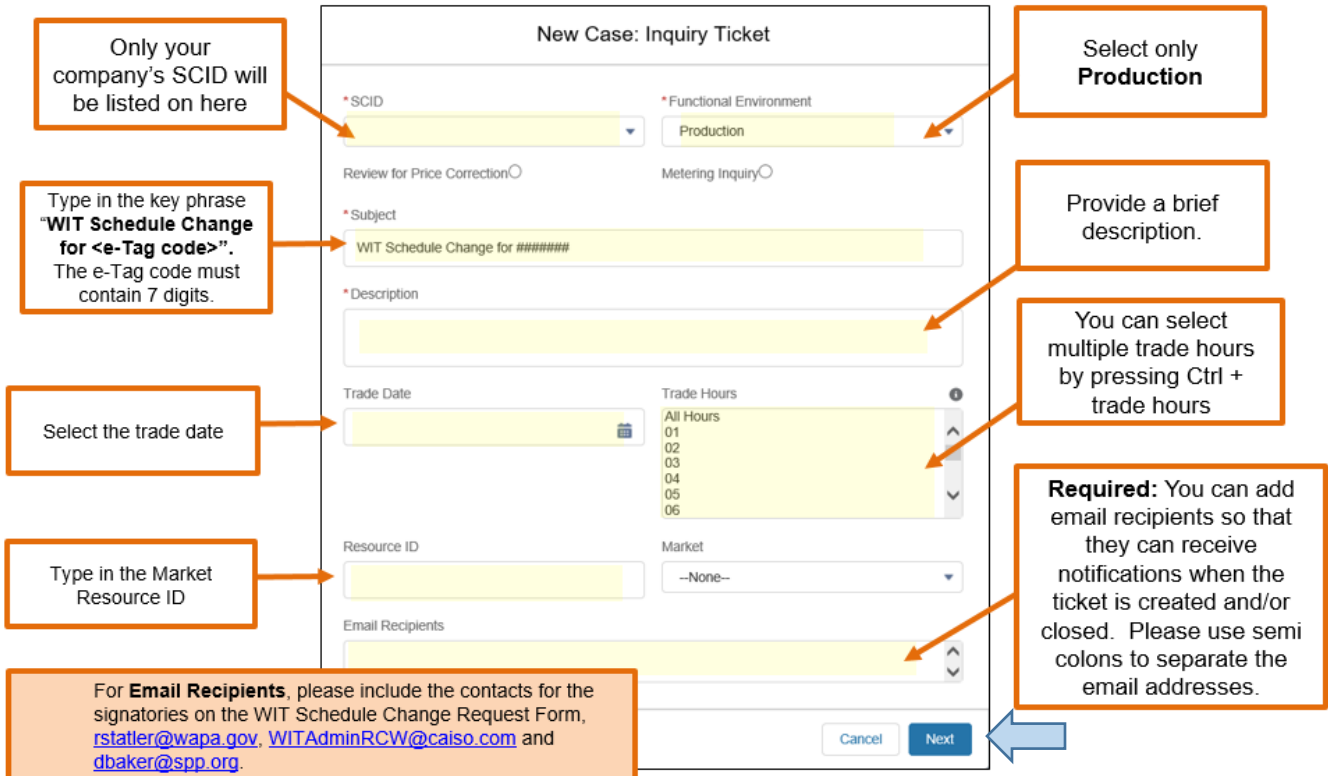


The screenshot shows a 'New Case' window with a 'Select a Record Type' dropdown menu. 'Inquiry Ticket' is selected and highlighted in blue. An orange arrow points to this selection. Below the dropdown are 'Cancel' and 'Next' buttons.

Please complete the required fields on the New Case: Inquiry Ticket window. Required fields are indicated by the asterisk sign (\*), in addition to the Email Recipients.

## Submitting a WIT Schedule Change Request in CIDI to RC West, (Cont'd)


The required fields are indicated by the asterisk signs \*, plus Email Recipients.



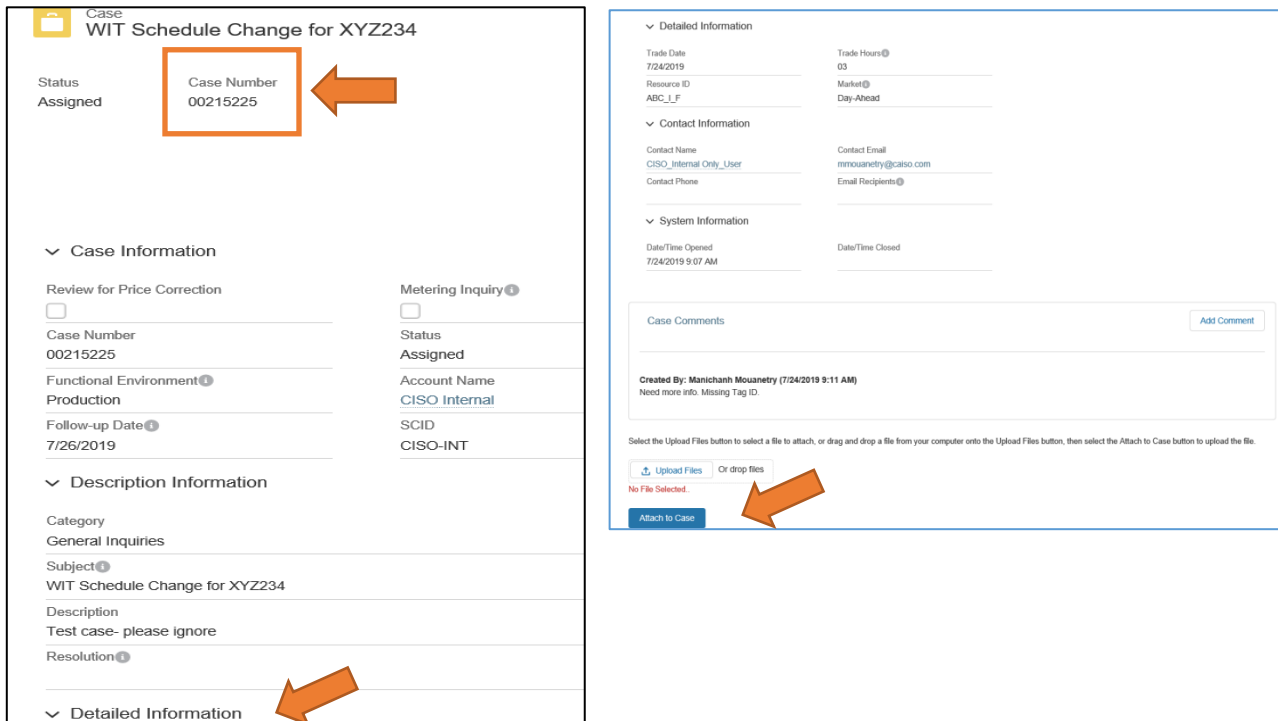
The screenshot shows the 'New Case: Inquiry Ticket' form with several callout boxes providing instructions:

- Only your company's SCID will be listed on here**: Points to the \*SCID dropdown field.
- Select only Production**: Points to the \*Functional Environment dropdown field, which is set to 'Production'.
- Type in the key phrase "WIT Schedule Change for <e-Tag code>". The e-Tag code must contain 7 digits.**: Points to the \*Subject text field, which contains 'WIT Schedule Change for #####'.
- Provide a brief description.**: Points to the \*Description text field.
- You can select multiple trade hours by pressing Ctrl + trade hours**: Points to the Trade Hours list, which includes 'All Hours' and hours 01 through 06.
- Required: You can add email recipients so that they can receive notifications when the ticket is created and/or closed. Please use semi colons to separate the email addresses.**: Points to the Email Recipients text field.
- For Email Recipients, please include the contacts for the signatories on the WIT Schedule Change Request Form, [rstalter@wapa.gov](mailto:rstalter@wapa.gov), [WITAdminRCW@caiso.com](mailto:WITAdminRCW@caiso.com) and [dbaker@spp.org](mailto:dbaker@spp.org).**: Points to the Email Recipients text field.
- Type in the Market Resource ID**: Points to the Resource ID text field.
- Select the trade date**: Points to the Trade Date date picker field.

At the bottom of the form are 'Cancel' and 'Next' buttons. A blue arrow points to the 'Next' button.

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After all the required field are updated, click **Next** to continue. This will generate a new Case Number request. You will need to attach/upload the WIT Schedule Change request template. A notification will be sent to the WIT Schedule Change team to review the new request.




The screenshot shows a web form for a 'Case WIT Schedule Change for XYZ234'. The status is 'Assigned'. The Case Number is 00215225. The form includes sections for Case Information, Description Information, and Detailed Information. The 'Attach to Case' button is highlighted with an orange arrow, and the 'Add Comment' button is also highlighted with an orange arrow.

**Ensure there is an attached WIT Schedule Change Request form**

**Ensure the WIT Schedule Change Request form includes the information below:**

- Date
- HE
- Time Zone
- Tag Code
- Current MW Schedule
- Requested MW Schedule
- Reason

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### Step 3: WIT Schedule Change is Completed

When the WIT Administrators have completed the change(s), an email will go out saying that has occurred to all the parties listed in the CIDI ticket.

## Supporting Information

### Operationally Affected Parties

Shared with Public.

### Version History

Version	Change	Date
1.0	Initial version. RCW BAs began using this process beginning 11/1/2019. Instructions were provided in Power Point form that was posted on the WECC website in the ISAS September meeting section.	12/20/19


## Periodic Review Procedure

### Review Criteria & Incorporation of Changes

There are no specific review criteria identified for this document.

### Frequency

Review at least once every three years.

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## Appendix A: Executive Committee and Working Group Structure

