
	Reliability Coordinator Procedure	Procedure No. RC0540A
		Version No. 1.1
		Effective Date 3/24/2022
RC West WIT Schedule Change Process		Distribution Restriction: None

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Background

This Procedure Attachment provides the steps for entities to submit a Western Interchange Tool (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 After-the-Fact (ATF) 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.


WIT Schedule Change Request Form links:

- a) https://www.wecc.org/Administrative/WIT_Schedule_Change_Request_Form_BLANK.xlsm
- b) <http://www.caiso.com/informed/Pages/RCWest/WECCInterchangeToolWorkingGroup.aspx>

The requesting BA (sink or source) shall follow the request process outlined below. The WIT Admin communicates back to all approving entities that the schedule change has been made in the WIT.

Step 1: Confirm access to submit request

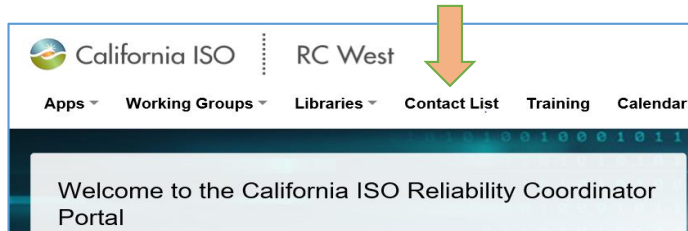
In order to submit the WIT Schedule Change request, RC West customers must have access to the Customer Inquiry Dispute Information (CID) application. For entities that are not RC West customers, please skip to Step 4.

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Step 4: Submit Request in WIT Schedule Change request via email

Access to this application shall be provisioned 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:

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



- d) Contact the CAISO Service Desk at (888) 889-0450 or ServiceDesk@caiso.com and provide your organization's name and they can pull up the UAA information for you.
- e) 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.
- f) If the user has an existing CAISO CMA certificate, the CIDI application will be automatically added to the user's profile.
- g) If the user requires a new certificate, the user will receive an email notification with instructions on how to register and install their certificate.


Step 3: Submit Request in WIT Schedule Change request via CIDI

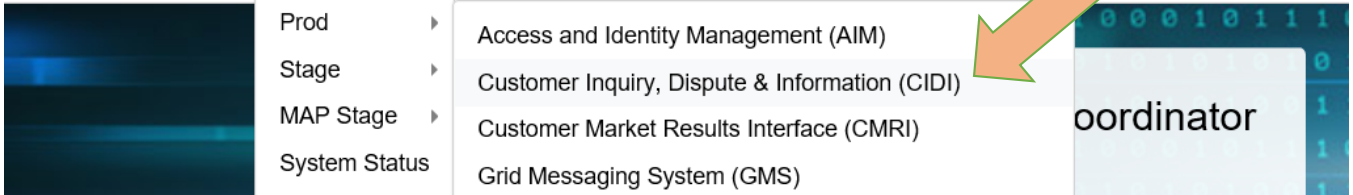
Before submitting a CIDI ticket for a WIT Schedule Change request, all signatures must be included and confirmed by the requesting BA in the **WIT Schedule Change Request Form**.


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.

Once the WIT Schedule Change Request Form is accurately completed and necessary signatures are included, please navigate to the RC Portal at <https://rc.caiso.com> and click on **Apps >> Prod >> CIDI**.

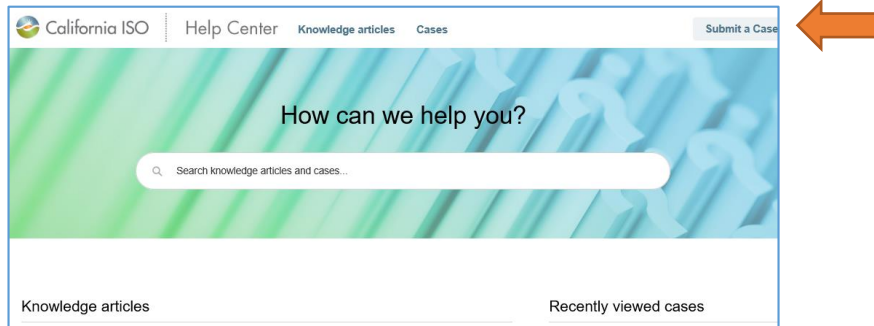
General instructions on how navigate through the application can found in the **CIDI User Guide**: http://www.caiso.com/Documents/NewCustomerInquiry_DisputeandInformation_CIDI_UserGuide.pdf

 California ISO RC West	Reliability Coordinator Procedure	Procedure No. RC0540A
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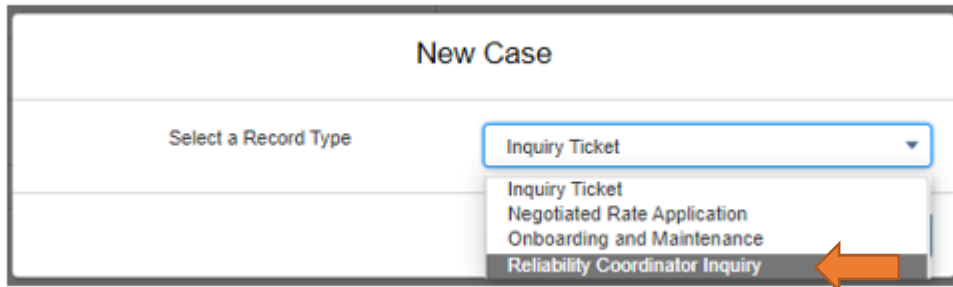



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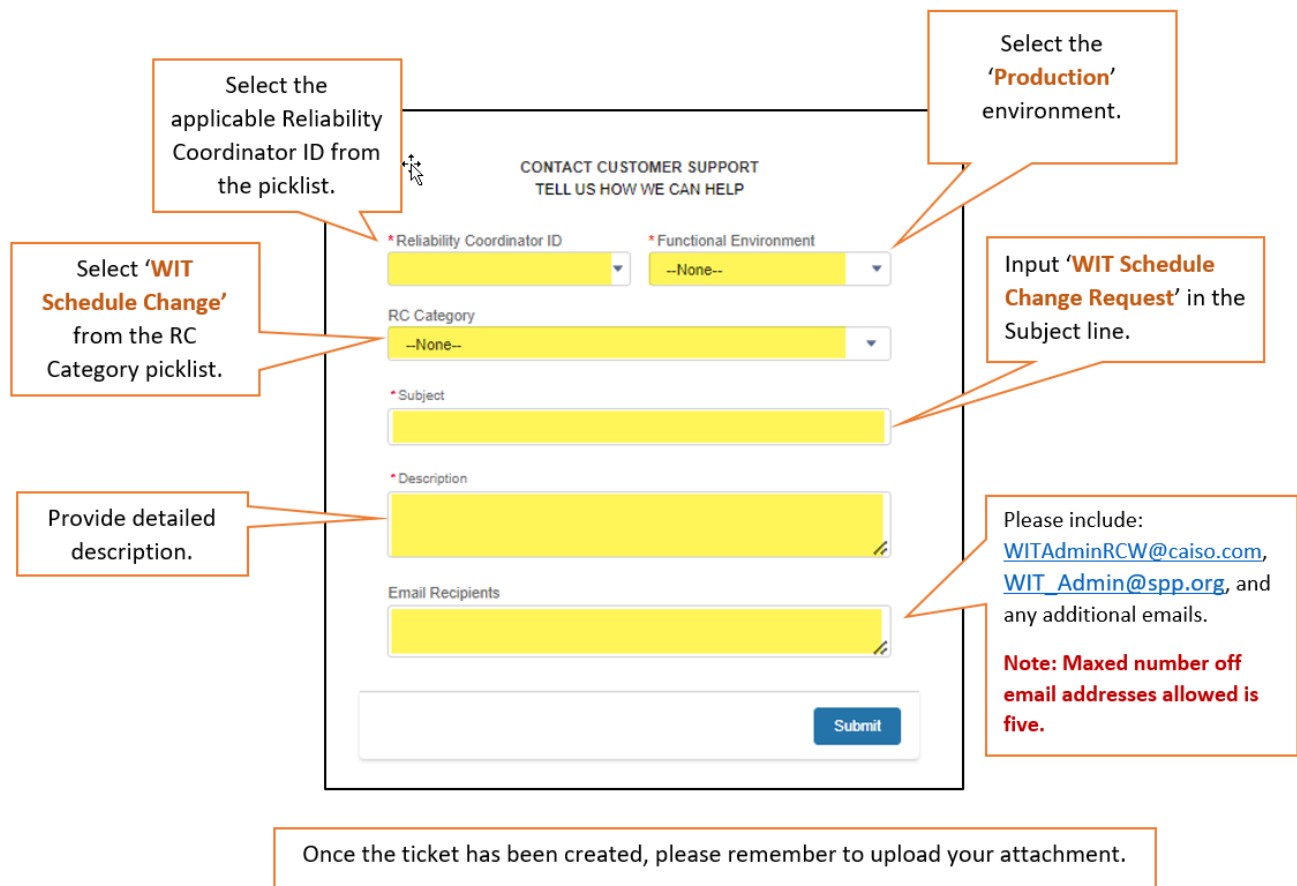
a) Log into CIDI and click on the **Submit a Case** button



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



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Select the applicable Reliability Coordinator ID from the picklist.

Select the 'Production' environment.

Select 'WIT Schedule Change' from the RC Category picklist.

Input 'WIT Schedule Change Request' in the Subject line.

Provide detailed description.

Please include: WITAdminRCW@caiso.com, WIT_Admin@spp.org, and any additional emails.


Note: Maxed number off email addresses allowed is five.

Once the ticket has been created, please remember to upload your attachment.

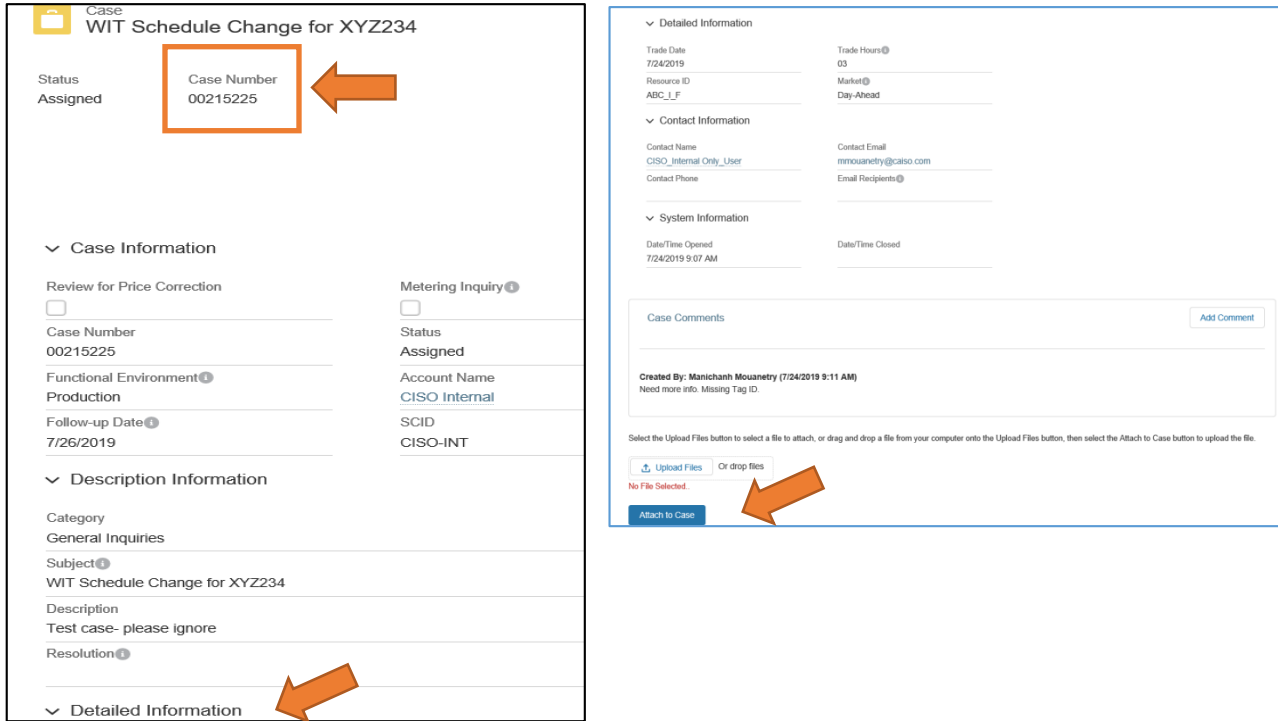
Submit

Please complete the required fields on the New Case: Inquiry Ticket window. Required fields are indicated by the asterik sign (*), in addition to the Email Recipients. **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 RC West WIT administrators, WITAdminRCW@caiso.com
- The SPP WIT administrators, WIT_Admin@spp.org

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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 displays a web-based form for a 'WIT Schedule Change for XYZ234'. The left-hand pane contains several sections: 'Case Information' with fields for 'Case Number' (00215225), 'Functional Environment' (Production), and 'Follow-up Date' (7/26/2019); 'Description Information' with 'Subject' (WIT Schedule Change for XYZ234) and 'Description' (Test case- please ignore); and 'Detailed Information' at the bottom. The right-hand pane shows 'Detailed Information' with fields for 'Trade Date', 'Trade Hours', 'Resource ID', 'Market', 'Contact Information', and 'System Information'. At the bottom of the right pane, there is an 'Upload Files' button with a red error message 'No File Selected' and an 'Attach to Case' button. Orange arrows point to the 'Case Number' field and the 'Upload Files' button.

Please attach the WIT Schedule Change Request form that includes all signatures. 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 4: Submit Request in WIT Schedule Change request via email

Reliability Coordinators or participants who do not have access to the Customer Inquiry Dispute Information (CIDI) application should submit an email request to the CAISO Service Desk at ServiceDesk@caiso.com. The email must include these instructions below:

- Email subject line must contain these key words, 'WIT Schedule Change Request'.
- In the body of the email:
 - Add instructions to the Service Desk to update the ticket to include the verbiage, 'WIT Schedule Change Request' in the Subject line.
 - Provide a brief description of the changes.
 - Attach a copy of the WIT Schedule Change Request form with complete signatures. The form is linked in the Background section above.
 - Include everyone from the form in the Recipient field to receive emails regarding the resolution of the request. These recipients include:
 - The RC West WIT administrators, WITAdminRCW@caiso.com
 - The SPP WIT administrators, WIT_Admin@spp.org

Please contact ServiceDesk@caiso.com if there are any changes needed to follow up to this ticket.

Step 5: WIT Schedule Change is Completed

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


Supporting Information

Operationally Affected Parties

Shared with the 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

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Version	Change	Date
1.1	Periodic Review: Updated procedure title for RC West and updated “Effective” date. Updated Inquiry Ticket type to Reliability Coordinator Inquiry and removed name specific detail to make the distribution more generic. Removed Appendix A diagram and included in main procedure RC0540. Minor format and grammar edits for consistency.	3/24/22

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.