Mar 2017

ISO Files Tariff Language

Training or Workshop

Publish Paper

	Trojected stake-noder initiatives winestones																							
	Initiatives	Initiative Lead	Start	Discuss at MSC	EIM Category (E1-E4)	Proposed EIM Governing Body Meeting	Proposed Board Meeting	Notes	Proposed Tariff Filing Date	Publish Paper	Meeting/call	Dec 2016 Comments Due	Training or Workshop	ISO Files Tariff Language	Publish Paper	Meeting/call	Jan 2017 Comments Due	Training or	ISO Files Tariff Language	Publish Paper	Feb 201	Training or	ISO Files Tariff Language	if PL
gr Js	ISO Board of Governors meeting		Recurring			weeting																		+
ir i	Market surveillance committee meeting	B. Cooper	Recurring																					
Recur Meeti	Market performance and planning meetings	J. Morris	Recurring																					4
~ =	Business practice manual change management meetings	J. Payton	Recurring																					4
	Bid cost recovery enhancements (formerly two-tier)	P. Servedio	Q4 2015				Mar 2017																	4
	Black Start	S. Vaughan	Q4 2016				May 2017								10	17	31							4
s	Commitment cost and Default Energy Bid Enhancements	C. Colbert	Q4 2016	Nov 18 2016			Jul 2017		2018			9												
i.	Contingency modeling enhancements	P. Servedio					May 2017		TBD	5	12						9							
itiat	Energy storage and aggregated distributed energy resource, Phase 2	T. Flynn	Q1 2016				Oct 2016			5	12	20												4
t In	Frequency response phase 2	C.Colbert	Dec 2016				Nov 2017			14	21						4							4
ren	Flexible resource adequacy criteria and must run obligation phase 2	K. Meeusen	June 2015				TBD				9	19												4
Cur	Generator contingency/RAS modeling		Q2 2016				July 2017				_	2												4
	Generation Interconnection Driven Network Upgrades Cost Recovery  Load Serving Entity Definition Refinement	S. Rutty P. Servedio	Q3 2016 Q3 2016				Dec 2016 Oct 2016				5	16												+
	Reliability services phase 2	E. Kim	Q3 2016	Mar 23 2015			Oct 2016																	+
	Stepped Constraint Parameters	D. Tretheway	Q2 2016	a. 20 20 10			Feb 2017			8	15						5							
												45			_									
e -	Regional Integration and EIM Greenhouse Gas Compliance	D. Tretheway	Q3 2016				TBD				1	15			5	12	19							4
rati	Metering Rules Enhancements	T. Flynn	Mar-16				Dec 2016																	4
teg	Regional Resource Adequacy	C. Devon	Nov 2015				TBD	3rd revised straw proposal - Posting late		1	8	30												4
=	- Togishai Toccaroo / Tabquay							Sept 2016		_														4
ous	Transitional Implementation Items	TBD	2017				TBD																	4
Regi								2nd revised straw																
ii.	Transmission Access Charge Options	L. Kristov	Oct 2015				TBD	proposal - Posting late Sept 2016	•	5	13	30												
	Florible conscitues and technical study process	C. Loutan	Recurring					Sept 2016																
S	Flexible capacity needs technical study process  Crid management charge (Rudget Process	Gordon					Oct 2016																	+
tive	Grid management charge/Budget Process		Recurring				OCI 2016																	+
itia	2017 & 2021 Local capacity requirements (LCR Study)	C. Micsa	Recurring																					4
g Ini	Participating transmission owner per unit cost	R. Emmert/ M.Wu	Recurring																					
ırring	Stakeholder initiatives catalog	B.Dean	Q3 2016				Feb 2017		N/A	15	22	9					9							
in De	2016-2017 Transmission planning process	R. Sparks	Recurring						N/A															
ĕ	2017-2018 Transmission Planning Process	R. Sparks	Recurring																					
	Western regions planning coordination	G. DeShazo	Recurring				N/A																	4
		Legal Lead	Start				Tariff Filed																	4
	Aliso Canyon Gas-Electric Coordination Phase 2	A. McKenna	16-Oct				3-Oct	Order requested 11/28/16	14-Oct															4
	Bidding Rules Enhancements - Minimum Load Rerate	A. McKenna						11/20/10	10/17 to 10/21															
																								4
	Commitment cost enhancements phase 3	D. Hou	May 2015						TBD N/A															4
	Competitive solicitation process enhancements CRR clawback rule modifications	S. Rutty D. Tretheway	May 2015 Nov 2015				June 2016		TBD															4
<u>,-</u>	Energy storage and aggregated distributed energy resource, Phase 1	T. Flynn	Q2 2015				Feb 2016		Jun-16															
a.		A. Ulmer							Mar-16															1
-	Expanding metering and telemetry options phase 2								Wai-10	_														4
	Metering Rules Enhancements	T. Flynn	Mar-16				Dec 2016			5	19	15												4
	Pricing Enhancements	Mannheim							Nov-16															#
	Reactive power requirements and financial compensation	C. Devon	May 2015				August 2016	Ruling:Pending	Oct-16															
	Reliability services phase 1b	K. Meeusen	Q1 2016						TBD															
	Revised Settlement Statement & Dispute Timeline for T+35M	T. Huynh	Dec-15				Aug 2016		TBD															
				Simulation																				
	Release / Implementation	Deployment		t - End			Activation	Project Manager																
	Capacity procurement mechanism replacement	11/1/2016	3/16/2016	9/16/2016			11/1/2016	Marcelo DaCosta																
2016	Reliability Services Initiative (RSI) 1A and Commitment Cost Phase 2 completio	11/1/2016	3/16/2016	9/16/2016			11/1/2016	Marcelo DaCosta																
it 2(	Demand response registration enhancements	10/31/2016	9/19/2016	10/28/2016			10/31/2016	Mike Lucas																
spendent 3 Release																								
Rel	Acceptable Use Policy - CMRI	12/1/2016	8/23/2016	9/23/2016			12/1/2016	John Williams																
<u> </u>	ADS Client Replacement	12/31/2016	TBD	TBD			TBD	John Williams																
ınc	Flexible Ramping Product	11/1/2016	8/16/2016	10/13/2016			11/1/2016	Jeremy Malekos																
	RIMS functional enhancements	TBD	TBD	TBD			TBD	John Williams																
_	Local Market Power Mitigation Enhancements (2015)	1/30/17	11/4/16	12/20/16			1/30/2017	Marcelo DaCosta																
201	CRR clawback rule modifications	TBD	N/A	N/A			TBD	Jim Barber																
dent	MRI-Settlements Enhancements	TBD	TBD	TBD			TBD	Mike Lucas																
ben	PIRP System Application Decommissioning	2/24/2017, 3/17/2017	1/3/17	1/18/17			2/24/2017, 3/17/2017	Brett Bruderer																
Inde	Self Schedules Bid Cost Recovery Allocation & Bid Floor	TBD	TBD	TBD			TBD	Adrian Chiosea																
se	Reliability Services Phase 1B	TBD	TBD	TBD			10/1/2017	Marci Stuckey																
lea	Bidding Rules Enhancements - Part B	TBD	TBD	TBD			10/1/2017	Marci Stuckey		1														
Re	Commitment cost enhancements phase 3	TBD	TBD	TBD			10/1/2017	Marci Stuckey																
2017	ADS User Interface Replacement	TBD	TBD	TBD			10/1/2017	Adrian Chiosea																
12	Metering Rules Enhancements	TBD	TBD	TBD			10/1/2017	Adrian Chiosea																
Fall	EIM 2017 Portland General Electric	TBD	TBD	TBD			10/1/2017	Jeremy Malekos		1														
Spring 2018	EIM Idaho Power Company	4/1/2018	TBD	TBD			4/1/2018	Janet Morris																
	Stepped Constraint Parameters	TBD	TBD	TBD			10/1/2018	Adrian Chiosea		1														
2018 sase	Regional Resource Adequacy	TBD	TBD	TBD			10/1/2018	Adrian Chiosea																
2   e	Pid cost recovery enhancements (formerly two ties)	TRD	TPD	TRD			10/1/2018	Adrian Chiosea		l														

10/1/2018 Adrian Chiosea

10/1/2018 Adrian Chiosea

Adrian Chiosea

Adrian Chiosea

Adrian Chiosea

Mike Lucas

TBD

TBD

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Post Implementation OMS Enhancements

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CSSA/jpayto 12/6/2016 Date updated: 12/6/2016

### Changes 12/1/16

Metering Rules Enhancements - Updated tariff development schedule

Removed Self Schedules Bid Cost Recovery Allocation & Bid Floor Initiative- what is left currently on this initiative will be absorbed in the BCR Enhancements initiative

### Changes 11/21/16

Regional Resource Adequacy - Updated policy schedule

Transmission Access Charge Options - Updated policy schedule

Flexible Resource Adequacy Criteria Must Offer Obligation - Phase 2 updated policy schedule

### Changes 11/14/16

CRR Rule Modification - Moved from Policy to Tariff; updated schedule Generation Interconnection Driven Network Upgrades Cost Recover - updated policy schedule ESDER Phase 2 - updated policy schedule

## Changes 11/1/16

Metering Rules Enhancements - Updated policy schedule

Generator Contingency and RAS Modeling - Updated policy schedule

Flexible Resource Adequacy Criteria Must Offer Obligation - Phase 2 updated policy schedule

## Changes 10/24/16

Commitment Costs and Default Energy Bid Enhancements - updated policy schedule

# Changes 10/24/16

Regional Integration - CA Greenhouse Gas Compliance - Updated policy schedule

Frequency Response Phase 2 - added policy schedule

Commitment Costs and Default Energy Bid Enhancements - added policy schedule

Stakeholder Catalog - updated policy schedule

Pricing Enhancements (Administrative Pricing Rules) - Updated tariff schedule

### Changes 10/18/16

Removed Fall 2016 Release as it was implemented on 10/1/2016

Changed Demand response registration enhancements deployment date to 10/31/2016

Changed Acceptable Use Policy - CMRI deployment date from 10/1/2016 to 12/1/2016

Added mandatory ADS Client Replacement required by year end

Changed Flexible Ramping Product deployment date from 10/1/2016 to 11/1/2016

Added MRI-Settlements Enhacements as a successor project to the OMAR Replacement

Schedule for RIMS Functional Enhancements is TBD

Changed PIRP System Application Decommissioning to early 2017

Added CRR Clawback and Self Schedules Bid Cost Recovery Allocation & Bid Floor as Independent 2017 projects