



California ISO

EIM Sub-Entity Scheduling Coordinator Role

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Agenda

Topic	Presenter
Welcome and stakeholder process	Kristina Osborne
Background	Danny Johnson
Proposal	Danny Johnson
EIM Classification and next steps	Kristina Osborne

CAISO policy initiative stakeholder process



Initiative Scope

The CAISO proposes to create a new EIM role that will allow separate scheduling and settlement of supply and load for entities within an EIM entity balancing authority area

EIM SUB-ENTITY SCHEDULING COORDINATOR ROLE - BACKGROUND

EIM Background – General

- EIM entities are responsible for the scheduling, settlement of all loads, interchange transactions and non-participating resources within their balancing authority area
 - These actions are preformed through an EIM entity scheduling coordinator
- Participating resource scheduling coordinators submit schedules and bids for their resources
- A resource sufficiency evaluation, which determines an entity's ability to access incremental EIM transfers, is preformed at an EIM entity level
- EIM entities are responsible for choosing the platform used for forecasting of load and variable energy resources

EIM Background – Settlements

- CAISO settles the energy difference between the resource meter and resource base schedule. CAISO settlement is preformed with the scheduling coordinator for a resource
 - For participating resources
 - For non-participating resources
- EIM entities are responsible for balancing costs such as over/under-scheduling, bid cost recovery, flexible ramp movement/uncertainty and non-participating grid management charges
 - Sub allocation of these are based on an EIM entity's OATT

EIM SUB ENTITY SCHEDULING COORDINATOR ROLE - PROPOSAL

EIM Sub-Entity Scheduling Coordinator – Responsibilities

- The CAISO proposes each EIM sub-entity scheduling coordinator will be responsible for serving their own load
 - Each sub-entity will have their own load aggregation point (LAP) within the CAISO model
- The CAISO proposes each EIM sub-entity is responsible for submitting base schedules for resources they are registered as scheduling coordinator for
- The CAISO proposes that base schedules submitted by sub-entities can be modified by their EIM entity scheduling coordinator following the T-55 base schedule deadline
 - EIM entity's are ultimately responsible for passing the resource sufficiency evaluation at the BAA level

EIM Sub-Entity Scheduling Coordinator – Forecasting

- CAISO will support sub-entities using their own forecasting service for variable energy supply output
 - Each resource will need its own unique resource ID and telemetry. For additional information please see CAISO Tariff Section 29.10 and the EIM BPM
 - Will support hybrid / co-located resources
- CAISO will support a sub-entity using their own load forecast
 - CAISO will offer ability to use CAISO created forecasts. This is functionality currently available to EIM entities

EIM Sub-Entity Scheduling Coordinator – Settlements

- The CAISO proposes an EIM sub-entity will submit meter data for resources they are a scheduling coordinator for as well as meter data for their load
 - The CAISO proposes to create invoices for load and send the invoices to the sub-entity
 - The CAISO proposes to send invoices for supply to the registered scheduling coordinator as well as the EIM entity
 - The CAISO proposes the EIM entity will retain read access of all sub-entity invoices within their EIM area
- Each EIM sub-entity will be responsible for ensuring all generation and load in its area is metered in accordance with the CAISO tariff Section 29.10

EIM Sub-Entity Scheduling Coordinator – Settlements

- Bid cost recovery costs will be allocated to EIM entities and sub-allocated per the entity's OATT
- Over/under-scheduling assessment will be performed at the balancing authority level but will be charged and allocated at EIM sub-entity level based upon the sub-entity's load
- The CAISO proposes flexible ramping movement allocation will be settled at the sub-entity level for resources under the sub-entity scheduling coordinator based upon metered demand

EIM Sub-Entity Scheduling Coordinator– Energy Transfers

- CAISO is proposing sub-entity scheduling coordinators have ability to submit intertie schedules as part of their initial base schedule
- The EIM entity scheduling coordinator is responsible for approval of these schedules
 - EIM entity scheduling coordinators retain responsibility for scheduling base ETSR
- This allows sub-entities some flexibility in scheduling interchange but preserves an EIM entities' tools and the authority necessary for balancing

EIM Sub-Entity Scheduling Coordinator – Outage Management

- EIM entities that are RC West members will submit outages in accordance with RC West rules through the CAISO webOMS application
- For EIM entities and their subsequent sub-entity scheduling coordinators that are EIM members but not RC West participants, the CAISO asks for comment on if there is interest in utilizing the CAISO webOMS to perform outage coordination

EIM Sub-Entity Scheduling Coordinator – System Access

The CAISO proposes EIM sub-entity scheduling coordinators will have access to the following systems:

- Base Aggregation Scheduling Portal (BSAP)
- Customer Market Results Interface (CMRI)
- CAISO Market Results Interface – Settlements (MRI-S)
- CAISO webOMS

EIM Sub-Entity Scheduling Coordinator – New Pro Forma Agreements


- The CAISO proposes to create new pro forma agreements
 - These agreements will be similar to the existing EIM entity and EIM entity scheduling coordinator agreements
 - These agreements will be developed as part of the tariff development section of this initiative

EIM GOVERNING BODY CLASSIFICATION AND NEXT STEPS

EIM Governing Body classification

- The CAISO believes the EIM Governing Body should have primary authority in the approval of the proposed changes.
 - The initiative satisfies both tests. The tariff rules to create a new type of scheduling coordinator role would be EIM-specific, because it would be available only to represent market participants within the balancing authority areas of EIM Entities and not across the entire market footprint. In addition, the primary driver for addressing this topic is to resolve an issue that is specific to one EIM balancing authority area. Accordingly, this initiative would fall within the primary authority of the EIM Governing Body.
- Stakeholders are encouraged to submit responses to the EIM classification in written comments

Next Steps



Nov 12, 2020	Stakeholder Call
Dec 3, 2020	Comments due
Jan 14, 2021	Publish Revised Straw Proposal
Jan 21, 2021	Stakeholder Call
Feb 11, 2021	Comments due
Mar 18, 2021	Publish Draft Final Proposal
Mar 25-26, 2021	Stakeholder Call
Apr 9 2021	Comments due
May 6, 2021	EIM Governing Body Meeting
May 19-20 2021	CAISO Board Meeting

Submit comments using the online template on the initiative webpage at <https://stakeholdercenter.caiso.com/StakeholderInitiatives/Western-EIM-sub-entity-scheduling-coordinator-role>