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## Purpose

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Provides guidance for:

- Providing or requesting Emergency Assistance to/from other Balancing Authorities
  - Scheduling of Emergency Assistance
  - Documentation of Emergency Energy Assistance
  - Settlement of Emergency Assistance
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## 1. CAISO Providing Emergency Assistance (Capacity and/or Energy)

*Note: If a WECC entity has experienced a disturbance and system frequency is below scheduled, then do not unilaterally adjust generation in an attempt to return Interconnection frequency to normal beyond that supplied through frequency bias action and Interchange Schedule changes. Such unilateral adjustment may overload transmission facilities.*


*Note: Emergency Assistance may be available from the CAISO for Balancing Authorities of the WECC Interconnection that are signatories to written contractual agreements with the CAISO (Interconnected Balancing Authority Operating Agreements, Service Schedule 13), or who have entered into a verbal contract with the CAISO by requesting such assistance in real-time.*

If ALL of the following are true:


- The requesting BA is experiencing an energy or capacity emergency and is unable to maintain WECC or NERC requirements for Operating Reserve, Control Performance, and/or Disturbance Control Standards
- All other commercial solutions have been exhausted
- The next relief measure is reduction of firm Load

Then the requesting Balancing Authority may request Emergency Assistance for capacity and/or energy by taking the actions outlined below:

Step	Requesting Balancing Authority Actions
1	<b>Advise</b> the CAISO System Operator of the nature of the problem, the commodity requested, energy or capacity, the amount, the time, the delivery point, and duration that the Emergency Assistance is required (This assistance should only be until the BA experiencing the emergency can get their schedules into HASP).
Step	CAISO System Operator Actions
2	<b>Evaluate</b> CAISO Operating Reserve, the available unloaded generating capacity to determine availability of transferable Operating Reserves or energy.
3	<b>Verify</b> that supplying emergency capacity to another BA will not decrease CAISO Operating Reserves below minimum NERC or WECC Standard requirements.

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<b>Step</b>	<b>CAISO System Operator and Requesting Balancing Authority Actions</b>
4	<b>Verify</b> that available transmission service exists to assure delivery capability if the Energy associated with the capacity is subsequently called upon.
5	<b>Agree</b> on the following: <ul style="list-style-type: none"> <li>○ Nature of assistance (energy or capacity),</li> <li>○ Maximum MW value,</li> <li>○ Duration of the schedule,</li> <li>○ Delivery point,</li> <li>○ Appropriate contact information to facilitate settlement.</li> <li>○ The price for Emergency Capacity Assistance will be the CAISO market price for the A/S product (Spin or Non-Spin), plus all other charges applicable to Exports from the CAISO Balancing Authority Area,</li> <li>○ The price for Emergency Energy Assistance will be the CAISO market price for the energy delivered at the scheduling point, plus all other charges applicable to Exports from the CAISO Balancing Authority Area</li> <li>○ Settlement for the Capacity will be according to the CAISO Tariff, and the CAISO settlement process, billing cycle, and payment timeline,</li> </ul>
<b>Step</b>	<b>CAISO System Operator Actions</b>
6	<b>Record</b> the above information in the SLIC log. This must be done to allow for correct settlements.
7	<b>Log</b> the “Title” as “Intertie Emergency Assistance.”
<b>Step</b>	<b>CAISO System Operator and Requesting Balancing Authority Actions</b>
8	<b>Establish</b> an emergency Balancing Authority-to-Balancing Authority Schedule.
<b>Step</b>	<b>CAISO Scheduler Actions</b>
9	<b>Create</b> a Schedule in CAS to facilitate the Balancing Authority-to-Balancing Authority assistance as follows: <ul style="list-style-type: none"> <li>○ <u>Scheduling Coordinator</u> - use valid SC ID if available, otherwise use ZISO. Energy type is CSPN.</li> <li>○ <u>Market Resource ID</u> - use the pre-determined Emergency Resource ID for Emergency Capacity and Energy transactions with the respective adjacent BAs. See E-505D for the pre-assigned Emergency Market Resource IDs. If the request comes from an entity other than an adjacent BA, create a “Proxy” resource ID using ZISO as the SCID. For example, a Non-Market Participant Emergency Capacity sale to Niagara Mohawk Power would have the Resource ID of “ZISO_TName_E_SR_EMERG.”</li> <li>○ <u>Comments</u> - A remark in the miscellaneous field that describes the transaction as Non-Market Participant (NMP) is helpful.</li> </ul>

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## 2. CAISO Receiving Emergency Assistance (Capacity and/or Energy)

*Note: If it is anticipated an operating capacity or energy emergency condition exists, then perform all actions necessary including bringing on all available generation, postponing equipment maintenance, scheduling interchange purchases in advance, and be prepared to reduce firm load.*


*Note: Only use the assistance provided by the Interconnection's frequency bias for the time needed to implement corrective actions.*

Perform the following to request Emergency Assistance for capacity and/or energy:


Step	CAISO System Operator Actions					
1	<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #e0f7fa;">If...</th> <th style="background-color: #e0f7fa;">Then...</th> </tr> </thead> <tbody> <tr> <td>The CAISO is experiencing an operating capacity or energy emergency, and is unable to maintain WECC or NERC requirements for Operating Reserve, Control Performance, or Disturbance Control Standards,</td> <td><b>Immediately implement</b> remedies to do so.</td> </tr> </tbody> </table>	If...	Then...	The CAISO is experiencing an operating capacity or energy emergency, and is unable to maintain WECC or NERC requirements for Operating Reserve, Control Performance, or Disturbance Control Standards,	<b>Immediately implement</b> remedies to do so.	
If...	Then...					
The CAISO is experiencing an operating capacity or energy emergency, and is unable to maintain WECC or NERC requirements for Operating Reserve, Control Performance, or Disturbance Control Standards,	<b>Immediately implement</b> remedies to do so.					
2	<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #e0f7fa;">If...</th> <th style="background-color: #e0f7fa;">Then...</th> </tr> </thead> <tbody> <tr> <td>           All of the following are true:           <ul style="list-style-type: none"> <li>○ All available generation capacity is loaded</li> <li>○ All available operating reserves are deployed</li> <li>○ All interruptible load and exports have been interrupted</li> <li>○ All other commercial solutions have been exhausted.</li> <li>○ The next relief measure is reduction of firm Load</li> <li>○ Reducing load through public appeals (time dependant)</li> </ul> </td> <td><b>Declare</b> an Energy Emergency through the WECC RC.</td> </tr> </tbody> </table>	If...	Then...	All of the following are true: <ul style="list-style-type: none"> <li>○ All available generation capacity is loaded</li> <li>○ All available operating reserves are deployed</li> <li>○ All interruptible load and exports have been interrupted</li> <li>○ All other commercial solutions have been exhausted.</li> <li>○ The next relief measure is reduction of firm Load</li> <li>○ Reducing load through public appeals (time dependant)</li> </ul>	<b>Declare</b> an Energy Emergency through the WECC RC.	
If...	Then...					
All of the following are true: <ul style="list-style-type: none"> <li>○ All available generation capacity is loaded</li> <li>○ All available operating reserves are deployed</li> <li>○ All interruptible load and exports have been interrupted</li> <li>○ All other commercial solutions have been exhausted.</li> <li>○ The next relief measure is reduction of firm Load</li> <li>○ Reducing load through public appeals (time dependant)</li> </ul>	<b>Declare</b> an Energy Emergency through the WECC RC.					

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3	<table border="1"> <thead> <tr> <th style="background-color: #e0f7fa;">If...</th> <th style="background-color: #e0f7fa;">Then...</th> </tr> </thead> <tbody> <tr> <td>The steps above have been exhausted, or if these steps cannot be completed in sufficient time to resolve the emergency condition,</td> <td> <b>Implement</b> the Electrical System Emergency procedure (E-508) to reduce risks to the interconnected system; and communicate current and future system conditions to the WECC RC Coordinator and neighboring Balancing Authorities.           <ul style="list-style-type: none"> <li>○ <b>Manually shed</b> firm load without delay to return the ACE to zero; and</li> <li>○ <b>Request</b> the WECC RC to declare an Energy Emergency Alert in accordance with Attachment 1-EOP-002-0 "Energy Emergency Alert Levels."</li> </ul> </td> </tr> </tbody> </table>	If...	Then...	The steps above have been exhausted, or if these steps cannot be completed in sufficient time to resolve the emergency condition,	<b>Implement</b> the Electrical System Emergency procedure (E-508) to reduce risks to the interconnected system; and communicate current and future system conditions to the WECC RC Coordinator and neighboring Balancing Authorities. <ul style="list-style-type: none"> <li>○ <b>Manually shed</b> firm load without delay to return the ACE to zero; and</li> <li>○ <b>Request</b> the WECC RC to declare an Energy Emergency Alert in accordance with Attachment 1-EOP-002-0 "Energy Emergency Alert Levels."</li> </ul>
If...	Then...				
The steps above have been exhausted, or if these steps cannot be completed in sufficient time to resolve the emergency condition,	<b>Implement</b> the Electrical System Emergency procedure (E-508) to reduce risks to the interconnected system; and communicate current and future system conditions to the WECC RC Coordinator and neighboring Balancing Authorities. <ul style="list-style-type: none"> <li>○ <b>Manually shed</b> firm load without delay to return the ACE to zero; and</li> <li>○ <b>Request</b> the WECC RC to declare an Energy Emergency Alert in accordance with Attachment 1-EOP-002-0 "Energy Emergency Alert Levels."</li> </ul>				
4	<b>Advise</b> adjacent BA's within the Interconnection the nature of the problem, the need for capacity and/or energy, the amount, the time, the delivery point, and duration that the Emergency Assistance is required.				
5	<b>Inquire</b> as to the availability of Emergency Assistance (capacity or energy).				
6	<b>Evaluate</b> CAISO Operating Reserve and the amount of Emergency Assistance required to meet all operating criteria through the peak hour without have to drop firm load to meet reliability standards.				
7	<b>Verify</b> that receiving emergency capacity from another Balancing Authority will satisfy the reliability criteria of CAISO to meet minimum NERC and WECC Standards.				
<b>Step</b>	<b>CAISO and Supplying Balancing Authority Actions</b>				
8	<b>Verify</b> that available transmission service exists to assure delivery of the Energy associated with the capacity sale if that energy subsequently called upon.				
9	<b>Agree</b> on the following: <ul style="list-style-type: none"> <li>○ The maximum MW value</li> <li>○ The duration of the schedule</li> <li>○ The delivery point</li> <li>○ The price for Emergency Assistance</li> </ul>				
<b>Step</b>	<b>CAISO System Operator Actions</b>				
10	<b>Record</b> the above information in the SLIC log. This must be done to allow for correct settlements.				
11	<b>Log</b> the "Title" as "Intertie Emergency Assistance."				

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<b>Step</b>	<b>CAISO System Operator Actions</b>
12	<b>Record</b> the above information in the SLIC log. This must be done to allow for correct settlements.
13	<b>Log</b> the “Title” as “Intertie Emergency Assistance.”
<b>Step</b>	<b>CAISO System Operator and Supplying Balancing Authority Actions</b>
14	<b>Establish</b> an emergency Balancing Authority-to-Balancing Authority Schedule.
<b>Step</b>	<b>CAISO Scheduler Actions</b>
15	<p><b>Create</b> a Schedule in CAS to facilitate the Balancing Authority-to-Balancing Authority assistance as follows:</p> <ul style="list-style-type: none"> <li>○ <u>Scheduling Coordinator</u> - use valid SC ID if available, otherwise use ZISO. Energy type is CSPN.</li> <li>○ <u>Market Resource ID</u> - use the pre-determined Emergency Resource ID for Emergency Capacity and Energy transactions with the respective adjacent BAs. See E-505D for the pre-assigned Emergency Market Resource IDs. If the request comes from an entity other than an adjacent BA, create a “Proxy” resource ID using ZISO as the SCID. For example, a Non-Market Participant Emergency Capacity sale to Niagara Mohawk Power would have the Resource ID of “ZISO_TName_E_SR_EMERG.”</li> <li>○ <u>Comments</u> - A remark in the miscellaneous field that describes the transaction as Non-Market Participant (NMP) is helpful.</li> </ul>

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### 3. Wheeling Emergency Assistance

If ALL of the following are true:


- The requesting Balancing Authority is experiencing an emergency, and is unable to maintain WECC or NERC requirements for Operating Reserve, Control Performance, or Disturbance Control Standards.
- All other commercial solutions have been exhausted,
- The next relief measure is Emergency Energy or Capacity Assistance.

Then the requesting Balancing Authority may request Emergency Wheeling Assistance by taking the actions outlined below:

Step	Requesting Balancing Authority Action
1	<b>Advise</b> the CAISO Shift Supervisor of the nature of the problem, the lines affected, the amounts, the time, and the duration that the Emergency Wheeling Assistance is required (This assistance should only be until the Balancing Authority can get their schedules into HASP).
Step	CAISO Actions
2	<b>Evaluate</b> the availability of transmission service, <b>And determine</b> how much transmission must be kept available for potential CAISO needs and how much can be provided as Emergency Wheeling Assistance.
3	<b>Verify</b> that CAISO load management programs are <u>not</u> needed to provide the Emergency Wheeling Assistance (no shedding of interruptible or firm Load).
Step	CAISO and Requesting Balancing Authority Actions
4	<b>Agree</b> on the following: <ul style="list-style-type: none"> <li>○ Transmission will be provided including all applicable charges specified in the CAISO Tariff,</li> <li>○ The total price may only be estimated before delivery and will be finalized in the settlement process,</li> <li>○ Energy and capacity are the responsibility of the requesting deficient system,</li> <li>○ Settlement for the Wheeling charges is in accordance with the CAISO Tariff, settlement process, billing cycle and payment timeline,</li> <li>○ The total Wheeling Access Charge is calculated based upon the voltage level of the lines used and the MWs transmitted,</li> <li>○ MW value,</li> <li>○ Ramp start time (if any) and duration,</li> <li>○ Delivery point and Receipt point,</li> <li>○ Duration of Schedule,</li> <li>○ Integrated MWH (for first hour only),</li> <li>○ The appropriate contact information to facilitate settlement.</li> </ul>

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Step	CAISO Actions
5	<b>Record</b> the above information in the CAISO SLIC log. This must be done to help assure correct settlements.
6	<b>Log</b> the “Title” as “Intertie Emergency Wheeling Assistance” and the “Price” as “Wheeling Charges.”
Step	CAISO and Requesting Balancing Authority Actions
<i>Note: The CAISO will facilitate the Emergency Wheeling Assistance Schedule for no longer than the remainder of the initial hour plus the following two hours. Beyond that time, Emergency Wheeling Assistance should be scheduled in HASP if possible.</i>	
7	<b>Establish</b> an emergency Balancing Authority-to-Balancing Authority Wheel Schedule.
Step	CAISO RT Scheduler Actions
8	<b>Create</b> a Wheeling Schedule (with receipt point and a delivery point and must have same Resource ID) in CAS to facilitate the Balancing Authority-to-Balancing Authority assistance as follows: <ul style="list-style-type: none"> <li>○ <u>Scheduling Coordinator</u> - use valid SC ID.</li> <li>○ <u>Resource ID</u> - should include an acronym that is descriptive of the receiver</li> <li>○ <u>Comments</u> - A remark in the miscellaneous field that describes the transaction as Non-Market Participant (NMP) would be helpful.</li> </ul>
9	<b>Verify</b> that the combined total transmission does not exceed the respective path ratings.
10	<b>Enter</b> a manual net interchange number reflecting the previous total interchange Schedule value adjusted by the value of the new Balancing Authority-to-Balancing Authority Emergency Wheeling Assistance Schedule, <b>And enter</b> the new Schedule as soon thereafter as practicable (after-the-fact if necessary), <b>And adjust</b> the manual net interchange as appropriate.

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#### 4. Load Transfer Emergency Assistance

If ALL of the following are true:


- The requesting Balancing Authority is experiencing an emergency and is unable to serve a portion of their Load that has separated from their Balancing Authority,
- Utility procedures exist that provide for transfer of this load to the CAISO Balancing Authority,
- The next relief measure is reduction of firm Load,

Then the requesting Balancing Authority may request an Emergency Load Transfer, transferring Load responsibility from the requesting Balancing Authority to the CAISO by taking the actions outlined below:

Step	Requesting Balancing Authority Action
1	<b>Advise</b> the CAISO Shift Supervisor of the nature of the problem, the lines affected, the amounts, the time, and the duration that the Emergency Load Transfer Assistance is required. This should only be until the requesting Balancing Authority can re-establish service to their transferred load <u>or</u> schedule their transferred Load in the next available CAISO Market
Step	CAISO Actions
2	<b>Evaluate</b> the availability of transmission service and Generation, <b>And determine</b> how much transmission and Energy must be kept available for potential CAISO needs and how much can be provided as Emergency Load Transfer Assistance.
3	<b>Verify</b> that CAISO load reduction programs are <u>not</u> needed to provide the Emergency Load Transfer Assistance (i.e. no shedding of interruptible or firm Load).

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Step	CAISO and Requesting Balancing Authority Actions
<p><i>Note: The CAISO will facilitate the Emergency Load Transfer Assistance until the Load is transferred back to the host, or until such time that the requesting BA can schedule their load into the next available CAISO Market.</i></p>	
4	<p><b>Agree</b> on the following:</p> <ul style="list-style-type: none"> <li>○ All applicable charges specified in the CAISO Tariff will be charged,</li> <li>○ The total price may only be estimated before delivery and will be finalized in the settlement process,</li> <li>○ Non-ISO transmission and capacity are the responsibility of the requesting deficient system,</li> <li>○ Settlement for the Load Transfer will be in accordance with the CAISO Tariff the CAISO settlement process, billing cycle and payment timeline.</li> <li>○ MW value,</li> <li>○ Duration of Emergency Load Transfer (if known),</li> <li>○ The appropriate contact information to facilitate settlement.</li> </ul>
Step	CAISO Actions
5	<p><b>Record</b> the above information into the CAISO SLIC log. This must be done to help assure correct settlements.</p>
6	<p><b>Log</b> the “Title” as “Emergency Load Transfer Assistance.”</p>
Step	CAISO RT Scheduler Actions
7	<p><b>None</b> – The Load Transfer should not involve any Interconnection, otherwise it would be Emergency Energy (<a href="#">Section 1</a>) or Emergency Wheeling (<a href="#">Section 2</a>) Assistance.</p>

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## 5. Billing and Payment

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Once the emergency request for assistance is concluded, take the following steps to reconcile the transaction:

<b>Step</b>	<b>CAISO Settlements Department Action</b>	
1	<b>Settle</b> the transaction based on the information supplied by the Operations Department Logs and the applicable Interconnected Balancing Authority Operating Agreement, Service Schedule 13, <b>OR</b>	
	<b>If...</b>	<b>Then...</b>
	There is no existing agreement,	<b>Use</b> the terms that were agreed to in Real Time.

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## Supporting Information

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**Operationally Affected Parties**

- N/A Posted on the Internet

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**Responsibility & Authority**

<b>CAISO NERC Certified RT Operating Personnel</b>	Hold authority, as delegated by the Executive Officers of the CAISO, to take or direct timely and appropriate real-time actions necessary to provide Emergency Assistance, and ensure reliable operation of the CAISO Controlled Grid, up to and including shedding of Firm Load to prevent or alleviate System Operating Limit or Interconnection Reliability Operating Limit violations. These actions may be performed without obtaining approval from higher-level personnel within the CAISO.
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**References**


<ul style="list-style-type: none"> <li>• <a href="#">CAISO Settlements and Billing Protocol</a></li> </ul>
<ul style="list-style-type: none"> <li>• <a href="#">CAISO Interconnected Control Area Operating Agreement</a></li> </ul>
<ul style="list-style-type: none"> <li>• WECC Regional Reliability Standard <a href="#">BAL-STD-002</a> and NERC Standard EOP-002</li> </ul>

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**Policy**

The CAISO may assist Balancing Areas within the WECC Interconnection during System Emergencies. The CAISO will not shed firm or non-firm load to provide Emergency Assistance to other Balancing Areas. The price for Emergency Energy Assistance will be the simple average of the relevant Dispatch Interval LMPs at the applicable Scheduling Point, which shall serve as the effective Market price for that Energy, plus all other CAISO Market and Administrative charges as applicable to Exports from the CAISO Balancing Authority Area.


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**Definitions**

Unless the context otherwise indicates, any word or expression defined in the Master Definitions Supplement to the CAISO Tariff shall have that meaning when capitalized in this Operating Procedure.

Term	Definition
<b>Emergency Energy Assistance</b>	Energy assistance provided to a requesting Balancing Area that is experiencing an emergency, and is unable to maintain WECC Operating Reserve requirements. The requesting Balancing Area has exhausted all other commercial solutions and the next relief measure is reduction of firm Load.
<b>Emergency Capacity Assistance</b>	Capacity assistance provided to a requesting Balancing Area that is experiencing an emergency, and is unable to maintain WECC Operating Reserve requirements. The requesting Balancing Area has exhausted all other commercial solutions and the next relief measure is reduction of firm Load.
<b>Emergency Wheeling Assistance</b>	Transmission wheeling assistance provided to a requesting Balancing Area that is experiencing an emergency, and is unable to maintain WECC Operating Reserve requirements. The requesting Balancing Area has exhausted all other commercial solutions and the next relief measure is reduction of firm Load. This assistance does not require CAISO Energy or Capacity, only transmission wheeling.
<b>Emergency Load Transfer</b>	Energy assistance provided to a requesting Balancing Area that is experiencing an emergency, and is unable to serve Load in their Balancing Area due to a contingency. The requesting Balancing Area has exhausted all other commercial solutions and the next relief measure is reduction of firm Load. This option is only viable if there is an alternate path that is normally open and that connects the Balancing Area to the CAISO.


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## Version History

Version	Change	By	Date
1.0	Drafted		12/11/98
2.0	Defined operating reserve levels for supplying Emergency Assistance, removed step by step references to Billing and Settlements procedures		7/17/00
2.1	Annual review, re-formatted		4/19/02
2.2	Annual review, no changes		8/1/03
2.3	Added logging info		8/28/03
2.4	Removed references to WECC Emergency Assistance Procedure, which has been withdrawn		01-06-03
2.5	Added specific direction for Schedulers to create correct interchange schedule in BITs.		7/15/04
2.6	Annual review, information mapped.		3/16/05
3.0	Added Emergency Wheeling Assistance to section 3		9/19/05
3.1	Removed requirement to e-mail Information Engineering & Analysis support staff of the Emergency Assistance		12/1/05
3.2	Corrected error that should have been done in last revision		12/9/05
4.0	Added Emergency Load Transfer Assistance to section 4		3/13/06
4.1	Removed lines within that instructed "Force BITs Schedule information to EMS."		4/20/06
5.0	Added Attachment B		5/2/06
5.1	Added CAISO NERC Certified RT Operating Personnel to Responsibility section.		11/15/06
5.2	Added clarification for Settlements & logging in Section 3		2/12/08
6.0	Deleted HA and added HASP for MRTU, changed how price is determined		4/1/09
6.1	Added note to beginning of Section 2; various minor changes for NERC/WECC compliance clarification		8/3/09
7.0	Complete review, major changes		9/15/09

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<b>Emergency Assistance</b>		<b>Distribution Restriction: NONE</b>	

## Technical Review

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Reviewed By Content Expert	Signature	Date
Ops Support		9/15/09
Operations Compliance		9/15/09
Regional Transmission		9/15/09
Grid Ops		9/15/09
Market Ops		9/15/09
Scheduling		

## Approval

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Approved By	Signature	Date
Manager, Grid Operations		
Director Grid Operations		9/15/09

## Appendix

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*Attachment A: Withdrawn*

*[Attachment B: Prices – Emergency Assistance to the CAISO](#)*

*[Attachment C: CFE Emergency Request](#)*

*Attachment D: Emergency Assistance Resource IDs*

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