



# Release User Group Agenda

March 12<sup>th</sup>, 2019

10:00 a.m.–11:00 a.m. (Pacific Time)

Web Conference Information	Conference Call Information
<p>Web Address: <a href="https://caiso.webex.com/meet/RUG">https://caiso.webex.com/meet/RUG</a> Meeting Number: 960 941 245</p> <p>Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter the phone number you will use during the call. You will be called by the conference shortly.</p>	<p>Dial-in Number: 866-528-2256 International Dial-in: 216-706-7052 Access Code: 291 426 5</p>
<p>Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publicly available on the ISO web page for a limited time following the meetings. The recordings, and any related transcriptions, should not be reprinted without the ISO's permission.</p>	

# Release User Group Agenda

Mar 12<sup>th</sup>, 2019

10:00 a.m. – 11:00 a.m. (Pacific Time)

<b>Time</b>	<b>Topic</b>	<b>Facilitator</b>
10:00 – 10:05	Agenda & ISO Roll call	Adrian Chiosea
10:05 – 10:45	Release Plan	Trang Deluca Cynthia Hinman Christopher McIntosh Jeremy Malekos Janet Morris

# The ISO offers innovative training programs



CustomerTraining@caiso.com

Date	Training courses and workshops
March 25	EIM Resource Sufficiency Enhancements webinar (new date)
April 11	Welcome to the ISO webinar
April 23 -25	ISO Training Workshop (ISO Headquarters)

## New Modules (recorded webinar and slides)

You can find new initiatives training courses on the learning center web page below. More resources will be added throughout 2019 in accordance with project schedules.

Visit our **Learning Center** web page to access our training calendar, register for courses and find other informational resources: <http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>

# Release Plan Summary: 2018 – Independent 2019

## Spring 2019

- Commitment Cost Enhancement (CCE) Phase 3
- Energy Imbalance Market (EIM) 2019 Balancing Authority of Northern California (BANC) / Sacramento Municipal Utility District (SMUD)

## Independent 2019

- Congestion Revenue Right Auction Efficiency 1B – CMRI report with Revenue Adjustments details
- EIM Resource Sufficiency Enhancements
- LMC Transparency Enhancement

## Fall 2019

- Commitment Costs and Default Energy Bid Enhancements [Phase 1](#)
- Energy Storage and Distributed Energy Resources [Phase 3A](#)
- RMR and CPM Enhancements (March 2019 BOG)
- Local Power Mitigation Enhancements (Mar 2019 BOG)
- EIM 2019 Enhancements

# Release Plan Summary: Fall 2019 – Spring 2020

## Spring 2020

- Energy Imbalance Market (EIM) 2020 Salt River Project
- Energy Imbalance Market (EIM) 2020 Seattle City Light
- Energy Imbalance Market (EIM) 2020 Los Angeles Dept. of Water and Power

## Independent 2020

- Automated Dispatch System (ADS) User Interface (UI) Replacement

## Fall 2020

- [Commitment Costs and Default Energy Bid Enhancements Phase 2](#)
- Contingency Modeling Enhancements - Transmissions
- DAME 15 Minute Granularity – Phase 1 (Jul 2019 BOG)
- Dispatch Operating Target Tariff Clarifications
- Storage as a Transmission Facility (BOG TBD)
- RA Enhancements Track 2 (Nov 2019 BOG)
- Excess Behind the Meter Production (May 2019 BOG)
- TAC Structure Enhancements (May 2019 BOG)
- [Energy Storage and Distributed Energy Resources Phase 3B](#)
- Energy Storage and Distributed Energy Resources Phase 4
- [Intertie Deviation Settlement](#)

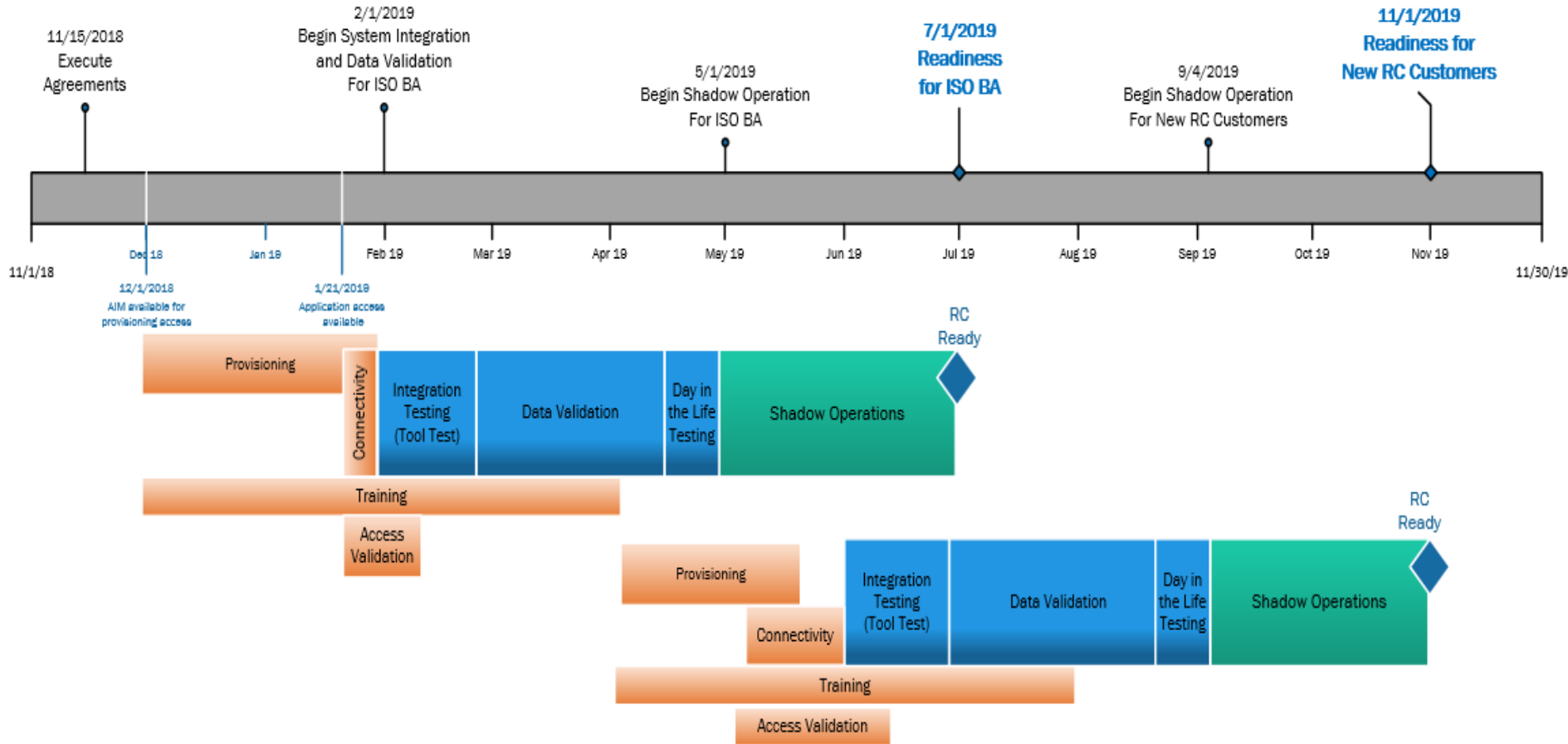
## Spring 2021

- Energy Imbalance Market (EIM) 2021 Public Service Company of New Mexico
- Energy Imbalance Market (EIM) 2021 North-Western Energy

## TBD – tentative, subject to impact assessment

- DAME - Flexible Ramping Product (Jul 2019 BOG)

# RC Participant Onboarding Timeline – please attend RC Onboarding webinars for more information.



# System Interface Changes: CMRI

Release	Project	Change Type	Customer Impact	Customer Action	UI Change	API Service Name & Major Version	MAP Stage	Production Activation	Technical Specifications	Artifacts
2019	CRR1B	New	CAISO Market	Adopt when ready	Tab: Post-Market  New Report: CRR Revenue Adjustment Details	retrieveCRRRevenueAdjustmentDetails_v1	Mar 12, 2019	Mar 21, 2019	<a href="#">3.8.2*</a>  *a revised version will be posted to address a typo correction to the XSD	<a href="#">1.0</a>
Spring 2019	CCE3	New	CAISO Market	Adopt when ready	Tab: Default Bids  New Report: Actual Limitation Values	RetrieveActualLimitationValues_CMRIv1  RetrieveActualLimitationValues_CMRIv1_DocAttach	Sep 2018	May 1, 2019	<a href="#">3.8.2</a>	<a href="#">1.1</a>
Spring 2019	CCE3	New	CAISO Market	Adopt when ready	Tab: Default Bids  New Report: Resource Opportunity Costs	RetrieveResourceOpportunityCost_CMRIv1  RetrieveResourceOpportunityCost_CMRIv1_DocAttach	Sep 2018	May 1, 2019	<a href="#">3.8.2</a>	<a href="#">1.1</a>
2019	RCSI	New	RC	Adopt when ready	New Tab: Reliability Coordination  New Report: Load Forecast	RetrieveRCLoadForecast_CMRI_v1  RetrieveRCLoadForecast_CMRI_v1_DocAttach	Feb 1, 2019	Sep 1, 2019	<a href="#">1.0.0</a>	<a href="#">1.1.0</a>

# System Interface Changes: OMS

Release	Project	Change Type	API Service Name & Major Version	MAP Stage	Production Activation	Technical Specifications	Artifacts
2019	RCSI	Modify	RetrieveAvailabilityResults_OMSv2 RetrieveAvailabilityResults_OMSv2_DocAttach  RetrieveResourceOutage_OMSv3 RetrieveResourceOutage_OMSv3_DocAttach  RetrieveResourceOutageChangeRequest_OMSv3 RetrieveResourceOutageChangeRequest_OMSv3_DocAttach  RetrieveTransmissionOutage_OMSv3 RetrieveTransmissionOutage_OMSv3_DocAttach  RetrieveTransmissionOutageChangeRequest_OMSv3 RetrieveTransmissionOutageChangeRequest_OMSv3_DocAttach  SubmitResourceOutage_OMSv3 SubmitResourceOutage_OMSv3_DocAttach  SubmitResourceOutageChangeRequest_OMSv3 SubmitResourceOutageChangeRequest_OMSv3_DocAttach  SubmitTransmissionOutage_OMSv3 SubmitTransmissionOutage_OMSv3_DocAttach  SubmitTransmissionOutageChangeRequest_OMSv3 SubmitTransmissionOutageChangeRequest_OMSv3_DocAttach	Feb 28, 2019	Sep 1, 2019	<a href="#">2.0</a>	<a href="#">Artifacts</a>



# System Interface Changes: ALFS, RCBSAP, RCEIDE, STLMT

System	Release	Project	Change Type	API Service Name & Major Version	MAP Stage	Production Activation	Technical Specifications	Artifacts
ALFS	2019	RCSI	New	SubmitExternalEntity5MinLoadForecast_ALFSv1 SubmitExternalEntity5MinLoadForecast_ALFSv1_DocAttach  SubmitExternalEntity15MinLoadForecast_ALFSv1 SubmitExternalEntity15MinLoadForecast_ALFSv1_DocAttach  SubmitExternalEntity60MinLoadForecast_ALFSv1 SubmitExternalEntity60MinLoadForecast_ALFSv1_DocAttach	Feb 1, 2019	Sep 1, 2019	<a href="#">1.0.0</a>	<a href="#">Artifacts</a>
RCBSAP	2019	RCSI	New	RetrieveRCBaseScheduleResults_RCBSAPv1 RetrieveRCBaseScheduleResults_RCBSAPv1_DocAttach  SubmitRCBaseSchedule_RCBSAPv1 SubmitRCBaseSchedule_RCBSAPv1_DocAttach	Feb 1, 2019	Sep 1, 2019	<a href="#">1.1</a>	<a href="#">Artifacts</a>
RCEIDE	2019	RCSI	New	PutSchedule_RC	Feb 1, 2019	Sep 1, 2019	<a href="#">1.0</a>	<a href="#">Artifacts</a>
STLMT	2019	RCSI	New	SubmitNetEnergyData_STLMTv1 SubmitNetEnergyData_STLMTv1_DocAttach	TBD	TBD	<a href="#">1.0</a>	<a href="#">1.0</a>

## References

- Developer Site
  - <https://developer.caiso.com/>
  - Requires sign-up for access
  - Fall 2019 Release Technical Specifications will be published here
- System Interface Change Summary
  - <http://www.caiso.com/Documents/SystemInterfaceChangeSummary.pdf>
- Application Access
  - <http://www.caiso.com/participate/Pages/ApplicationAccess/Default.aspx>

# Release Schedule 2019

Date of Data Refresh: 3/12/19



Legend	
Market Simulation	CA ISO Holiday
External Testing	Deployment Week

3/11/19 - 3/17/19
3/18/19 - 3/24/19
3/25/19 - 3/31/19
4/1/19 - 4/7/19
4/15/19 - 4/21/19
4/29/19 - 5/5/19
7/15/19 - 7/21/19
7/22/19 - 7/28/19
7/29/19 - 8/4/19
8/5/19 - 8/11/19
8/12/19 - 8/18/19
8/19/19 - 8/25/19
8/26/19 - 9/1/19
9/2/19 - 9/8/19
9/9/19 - 9/15/19
9/16/19 - 9/22/19
9/23/19 - 9/29/19
9/30/19 - 10/6/19
10/7/19 - 10/13/19
10/14/19 - 10/20/19

## MAP Stage Environment Window

CRR 1B CMRI Report	CRR 1B CMRI Report (03/01-03/21)
CRR 1B - CMRI Report External Testing Starts	CRR 1B - CMRI Report External Testing Starts (03/12)
EIM Resource Sufficiency - Capacity & Sufficiency	EIM Resource Sufficiency - Capacity & Sufficiency (03/25-04/16)
EIM Resource Sufficiency - Capacity & Sufficiency - External Testing Starts	EIM Resource Sufficiency - Capacity & Sufficiency - External Testing Starts (03/27)
CCDEBE Phase 1	CCDEBE Phase 1 (07/15-
CCDEBE Phase 1 - Market Sim	CCDEBE Phase 1 - Market Sim (07/15-08/30)
ESDER Phase 3A	ESDER Phase 3A (07/15-08/30)
ESDER Phase 3A - Market Sim	ESDER Phase 3A - Market Sim (07/15-08/30)
RMR and CPM Enhancements	RMR and CPM Enhancements (07/15-08/30)
RMR and CPM Enhancements - Market Sim	RMR and CPM Enhancements - Market Sim (07/15-08/30)
LMPM - Enhancements	LMPM - Enhancements (07/15-08/30)
LMPM - Enhancements - Market Sim	LMPM - Enhancements - Market Sim (07/15-08/30)
EIM Enhancements 2019	EIM Enhancements 2019 (07/15-08/30)
EIM Enhancements 2019 - Market Sim	EIM Enhancements 2019 - Market Sim (07/15-08/30)

## Production Environment Window

CRR 1B CMRI Report	CRR 1B CMRI Report (03/21)
Commitment Cost Phase 3 Activation	Commitment Cost Phase 3 Activation (04/01)
EIM - BANC-SMUD	EIM - BANC-SMUD (04/03)
EIM Resource Sufficiency - Capacity & Sufficiency	EIM Resource Sufficiency - Capacity & Sufficiency (04/16)
LMC Transparency Enhancement	LMC Transparency Enhancement (05/01)
CCDEBE Phase 1	CCDEBE Phase 1 (10/01)
ESDER Phase 3A	ESDER Phase 3A (10/01)
RMR and CPM Enhancements	RMR and CPM Enhancements (10/01)
LMPM - Enhancements	LMPM - Enhancements (10/01)
EIM Enhancements 2019	EIM Enhancements 2019 (10/01)

<http://www.caiso.com/Documents/ReleaseSchedule.pdf>

# 2019 Spring Release

# Spring 2019 Release – Overview

	Board Approval	External BRS	Config Guide	Tech Spec	Draft Tariff**	BPMs	External Training	Market Sim / Ext Testing Start	Production Activation
<b>Spring 2019 Release - Overview</b>									
Commitment Costs Phase 3	03/25/16	08/21/17	05/17/18	08/02/18	07/31/17	12/07/18	09/10/18	09/05/18 – 10/12/18	04/01/19
EIM - BANC-SMUD	N/A	N/A	N/A	N/A	N/A	N/A	N/A	12/03/18 – 01/31/19	04/03/19

## Notes:

Items in **BLUE** are complete

Items in **PURPLE** indicate a new date.

\*TBD items may be inapplicable, or they may have undetermined dates

\*\*Draft Tariff dates have been updated to show only the draft tariff posting. FERC Filing dates can be seen on individual project slides.

# Spring 2019 - Commitment Cost Enhancements Phase 3

Project Info	Details/Date
Application Software Changes	<p><b>Scope:</b></p> <ol style="list-style-type: none"> <li>1. Clarify use-limited registration process and documentation to determine opportunity costs</li> <li>2. Determine if the ISO can calculate opportunity costs               <ul style="list-style-type: none"> <li>• ISO calculated; Modeled limitation Start/run hour/energy output</li> <li>• Market Participant calculated; Negotiated limitation</li> </ul> </li> <li>3. Clarify definition of “use-limited”; add MSG Configuration ID to ULPDT</li> <li>4. Change Nature of Work attributes (Outage cards)               <ul style="list-style-type: none"> <li>• Modify use-limited reached for RAAIM Treatment</li> <li>• Allow PDR to submit use-limit outage card for fatigue break.</li> </ul> </li> <li>5. Market Characteristics (added to GRDT in Spring 2018) shall be Read-Only and set to Null               <ul style="list-style-type: none"> <li>• Maximum Daily Starts</li> <li>• Maximum MSG transitions</li> <li>• Ramp rates</li> </ul> </li> </ol> <p><b>Impacted Systems:</b></p> <ol style="list-style-type: none"> <li>1. Master File: Set use-limited resource types and limits</li> <li>2. ECIC: Process use limited resource input values for and Receive opportunity cost adders from opportunity cost tool</li> <li>3. CIRA: RAAIM exempt rule for “use-limited reached”</li> <li>4. CMRI: Publish opportunity cost</li> <li>5. SIBR: Add Opportunity cost adders on bid caps</li> <li>6. OMS: “Use-Limited Reached” nature of work attribute for Generation Outage Card</li> <li>7. Settlements: Publish the actual start up, run hour and energy output for the use-limited resources</li> <li>8. Opportunity cost calculator (OCC): Calculate and publish opportunity costs for start-up, MLC and DEB</li> </ol>
BPM Changes	Market Instruments, Outage Management, Reliability Requirement, Market Operations

## Spring 2019 - Commitment Cost Enhancements Phase 3 (cont.)

Milestone Type	Milestone Name	Dates	Status
Board Approval	Board of Governors (BOG) Approval	Mar 25, 2016	✓
External BRS	Post Updated External BRS	Aug 21, 2017	✓
Config Guides	Config Guide	May 17, 2018	✓
Tech Spec	Publish Updated Master File Technical Specification, GRDT/IRDT Definitions	Jul 13, 2018	✓
	Publish updated CMRI Tech Spec, updated API for Use Limit Type Enumeration update	Aug 02, 2018	✓
Tariff	Draft Tariff	Jul 31, 2017	✓
	File Tariff	Mar 23, 2018	✓
BPMs	Publish Draft BPM: Market Instruments	Oct 19, 2018	✓
	Publish Draft BPM: Market Operations	Oct 19, 2018	✓
	Publish updated Draft BPMs	Dec 07, 2018	✓
	Publish updated Draft BPM: Market Operations (PRR 1147)	Mar 04, 2019	✓
External Training	Deliver External Training	Sep 10, 2018	✓
Market Simulation	Full Market Simulation Testing	Sep 05, 2018 - Oct 12, 2018	✓
Production Activation	ISO reach out to resources eligible for negotiated opportunity costs	Feb 2019	✓
	Commitment Costs Phase 3	Apr 01, 2019	
	OC Adders Effective	May 01, 2019	

# Spring 2019 – EIM BANC/SMUD

Project Info	Details/Date
Application Software Changes	Implementation of SMUD as an EIM Entity
BPM Changes	EIM BPM will be updated if needed to reflect new modeling scenarios identified during implementation and feedback from SMUD.
Market Simulation	December 3, 2018 – January 31, 2019
Parallel Operations	February 1, 2019 – March 31, 2019
Notes:	Readiness Certification filed with FERC In Parallel Operations until 03/31/2019

Milestone Type	Milestone Name	Dates	Status
Tariff	File Readiness Certification	Mar 01, 2019	✓
Market Sim	Market Sim Window	Dec 03, 2018 - Jan 31, 2019	✓
Parallel Operations	Parallel Operations	Feb 01, 2019 - Mar 31, 2019	
Production Activation	EIM - BANC-SMUD	Apr 03, 2019	



# 2019 Independent

# Independent 2019 – Overview

	Board Approval	External BRS	Config Guide	Tech Spec	Draft Tariff**	BPMs	External Training	Market Sim / Ext Testing Start	Production Activation
<b>Independent 2019 - Overview</b>									
CRR Auction Efficiency 1B – CMRI Report with CRR Info	N/A	01/18/19	N/A	02/08/19	N/A	N/A	N/A	03/12/19	03/21/19
EIM Resource Sufficiency Enhancements – Capacity & Sufficiency	N/A	01/25/19	N/A	02/20/19	N/A	02/14/19	03/25/19	03/27/19	04/16/19
LMC Transparency Enhancement	N/A	11/19/18	10/19/18	N/A	N/A	10/19/18	N/A	N/A	05/01/19

## Notes:

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 Items in **PURPLE** indicate a new date.

\*TBD items may be inapplicable, or they may have undetermined dates

\*\*Draft Tariff dates have been updated to show only the draft tariff posting. FERC Filing dates can be seen on individual project slides.

# 2019 - CRR Auction Efficiency 1B – CMRI Report with Revenue Adjustments details

Project Info	Details/Date
Application Software Changes	<p>CAISO will provide the following CRR-specific information in a new CMRI report, per binding constraint and time interval</p> <ul style="list-style-type: none"> <li>• CRR ID</li> <li>• Hedge Type (option or obligation)</li> <li>• CRR Type (LSE, AUC, etc.)</li> <li>• Hourly Notional Revenue</li> <li>• Hourly CRR Clawback Revenue</li> <li>• Hourly Circular Scheduling Revenue</li> <li>• De-rate factor (applies to merchant TOR CRRs)</li> <li>• CRR award MW</li> <li>• Offset Revenue</li> </ul> <p>This information will be provided for each CRR at a unique source and sink location. If an SC has multiple CRRs at the same source and sink, result will be based on the net award value</p>

Milestone Type	Milestone Name	Dates	Status
External BRS	Post External Draft BRS	Mar 04, 2019	✓
Tech Spec	Create ISO Interface Spec (Tech spec)	Feb 08, 2019	✓
External Testing	CRR 1B – CMRI Report External Testing Starts	Mar 12, 2019	
	Settlements Trade Dates	Mar 12 – 13, 2019	
	Settlements Publish Dates	Mar 18 - 19, 2019	
Production Activation	New CMRI Report - CRR Revenue Adjustments Detail	Mar 21, 2019	

# 2019 – EIM Resource Sufficiency Enhancements

Project Info	Details/Date
Application Software Changes	<p><b>EIM:</b> Perform Capacity Test and Flex Ramp Up/Down Sufficiency Test Enhancements</p> <ul style="list-style-type: none"> <li>• Apply Tolerance Threshold to Flex Ramp Sufficiency Test of 1% or 1MW threshold, whichever greater</li> <li>• Both Bid Range Capacity and Flex Ramp Sufficiency Test evaluations shall independently pass/fail for each 15min interval of next trade hour at T-70, T-55, and T-40</li> <li>• Apply new Bid Range Capacity Test rule where failure of one 15min interval of trade hour results in failure of same 15-minute interval for Flex Ramp Sufficiency Test</li> </ul> <p><b>BAAOP:</b> EIM Operator displays shall be modified to:</p> <ol style="list-style-type: none"> <li>1) Present EIM BAA Sufficiency Test status results in 15min granularity for Bid Range Capacity and Flex Ramp Up/Down Sufficiency Tests (Balancing or Feasibility Test status results remain hourly)</li> <li>2) Provide Bid Range Capacity Test results with 15min granularity</li> </ol> <p><b>RTM (RTPD, RTD):</b> Apply EIM transfer limits based on 15-minute Sufficiency Test results:</p> <ul style="list-style-type: none"> <li>• EIM Transfer for 15min interval failing FRU/FRD limited from below/above (import/export) to least restrictive of:             <ul style="list-style-type: none"> <li>○ EIM Transfer in previous 15min interval from last successful FMM, or</li> <li>○ Base EIM Transfer schedule in current 15min interval from current FMM</li> </ul> </li> </ul> <p><i>See Technical Specifications note below regarding CMRI and OASIS impacts to data. No changes will be made to the data structure of API technical specifications (e.g. same data schema and broadcast service), but the data context and, in the case of OASIS, enumerations will change with the transition to 15min granularity.</i></p> <p><i>Note: No settlement impact.</i></p>
BPM Changes	<ul style="list-style-type: none"> <li>• Energy Imbalance Market</li> <li>• Market Instruments</li> <li>• Market Operations</li> </ul>

# 2019 – EIM Resource Sufficiency Enhancements

Project Info	Details/Date
Technical Specifications	<p>CMRI and OASIS API technical specifications will <i>not</i> be modified, although the following changes in data context will occur:</p> <p><b>CMRI:</b></p> <ul style="list-style-type: none"><li>• <i>Energy Imbalance Market &gt; Bid Range Capacity Test Results</i> report shall transition from reporting hourly result in either UP or DOWN direction (one record) to reporting the most-insufficient 15-minute time interval of trade hour in both UP and DOWN direction (two records)</li><li>• Bid Capacity and Flex sufficiency values (reported as negative insufficiency) will be provided for each 15min interval (instead of zero value) to clarify EIM BAA’s proximity to insufficiency thresholds</li></ul> <p><b>OASIS:</b></p> <ul style="list-style-type: none"><li>• <i>Energy &gt; EIM Transfer Limits</i> report (which was previously deprecated in 2015) will be re-purposed to provide the IMPORT and EXPORT Net EIM Transfer Limits for binding 15min/5min RTM intervals impacted by Flex Ramp Up/Down Sufficiency Test failure (by EIM Balancing Authority Area)</li><li>• The API name (existing) for the OASIS report is “ENE_EIM_TRANSFER_LIMITS”</li><li>• Pre-existing report data (from 2015) reflecting “High” and “Low” Limit Types will remain; this implementation will provide “Import” and “Export” Limit Types for the report’s re-purposed use</li></ul> <p>No formal structured scenarios will be schedule for Market Simulation, but test environment will be available to allow external participants to test impacts to their business processes.</p> <p><i>Example results will be provided in forthcoming external business requirements specification (External BRS) document.</i></p>

# 2019 – EIM Resource Sufficiency Enhancements – Capacity & Sufficiency

Milestone Type	Milestone Name	Dates	Status
Board Approval	Obtain Board of Governors Approval	N/A	
External BRS	Milestone: Post External BRS (v1.0)	Jan 16, 2019	✓
	Milestone: Post External BRS (v1.1)	Jan 25, 2019	✓
Config Guides	Post Draft Config Guides	N/A	
Tech Spec	Create ISO Interface Spec (OASIS Tech spec)	Feb 20, 2019	✓
Tariff	File Tariff	N/A	
BPMs	Post Draft Business Practice Manual changes	Feb 14, 2019	✓
External Training	Deliver External Training (revised)	Mar 25, 2019	
	Post External CBT Online	Apr 10, 2019	
External Testing	External Testing Starts	Mar 27, 2019	
Production Activation	EIM Resource Sufficiency	Apr 16, 2019	

# 2019 – LMC Transparency Enhancement

Project Info	Details/Date
Application Software Changes	<p>Logical Meter Calculation (LMC) enhancements will provide additional transparency for ISO market participant dynamic system resources (non ISO-pollled) by providing LMC Allocation Factors used to determine the 5-minute settlement interval meter value as a bill determinant. Allocation Factor bill determinants become available for settlement dates on or after May 1, 2019.</p>

Milestone Type	Milestone Name	Dates	Status
External BRS	Post External BRS	Nov 19, 2018	✓
Config Guides	Post Config Guides	Oct 19, 2018	✓
BPMs	Post Draft BPM changes – PRR 1102	Oct 19, 2018	✓
Market Simulation	Market Sim Window	N/A	
Production Activation	LMC Transparency Enhancements	May 1, 2019	

# 2019 Fall Release



# Fall 2019 Release – Overview

	Board Approve	External BRS	Config Guides	Tech Specs***	MSIM Scenarios	Draft Tariff**	BPMs	External Training	Market Sim	Prod. Active
<b>Fall 2019 Release - Overview</b>		<b>04/01/19</b>	<b>05/17/19</b>			<b>06/14/19</b>	<b>07/12/19</b>	<b>07/12/19</b>	<b>07/15/19 - 08/30/19</b>	<b>10/01/19</b>
CCDEBE Phase 1	03/22/18	01/22/19	05/17/19	05/17/19	TBD	06/14/19	07/12/19	07/11/19	07/15/19 - 08/30/19	10/01/19
ESDER Phase 3A	09/05/18	02/11/19	05/17/19	05/02/19	TBD	04/15/19	06/20/19	07/10/19	07/15/19 - 08/30/19	10/01/19
RMR and CPM Enhancements	03/28/19	TBD	TBD	TBD	TBD	TBD	TBD	TBD	07/15/19 - 08/30/19	10/01/19
LMPM - Enhancements	03/28/19	TBD	TBD	TBD	TBD	TBD	TBD	TBD	07/15/19 - 08/30/19	10/01/19
EIM Enhancements 2019	N/A	02/05/19	TBD	TBD	TBD	N/A	TBD	TBD	07/15/19 - 08/30/19	10/01/19

## Notes:

Items in **BLUE** are complete

Items in **PURPLE** indicate a new date.

Items in **RED** indicate a new date which is later than the target date listed on the overview line.

\*TBD items may be inapplicable, or they may have undetermined dates

\*\*Draft Tariff dates have been updated to show only the draft tariff posting. FERC Filing dates can be seen on individual project slides.

\*\*\*Fall 2019 Release Technical Specifications will be published at <https://developer.aiso.com>; **this site requires sign-up for access**

# Fall 2019 Release – System Interface Changes *(Preliminary)*

System	Project	Change Type	Description	MAP Stage	Production Activation	Technical Specifications	Artifacts
CMRI	CCDEBE1	New	participant to retrieve final default commitment cost	Jul 15, 2019	Oct 1, 2019	TBD	TBD
CMRI	CCDEBE1	Modify	participant to retrieve default bid curve at hourly level and include DEB source (cost type/ exante process)	Jul 15, 2019	Oct 1, 2019	TBD	TBD
CMRI	LMPME	Modify	DefaultBidCurves_v1 XSD change to remove enumeration from XSD	Jul 15, 2019	Oct 1, 2019	TBD	TBD
CMRI	EIM 2019	Modify	include base schedule deviation in the balancing test results XSD	Jul 15, 2019	Oct 1, 2019	TBD	TBD
MF	ESDER3A	Modify	GeneratorRDT_v4 XSD for additional bidding option for PDR	Jul 15, 2019	Oct 1, 2019	TBD	TBD
MF	LMPME	Modify	GeneratorRDT_v4 XSD change to add default/alternate bilateral hub, max horizon cap value, and new DEB type	Jul 15, 2019	Oct 1, 2019	TBD	TBD
SIBR	CCDEBE1	New	SIBR - participant to submit exante bid and commitment	Jul 15, 2019	Oct 1, 2019	TBD	TBD
SIBR	CCDEBE1	New	SIBR - participant to retrieve submitted exante bid and commitment	Jul 15, 2019	Oct 1, 2019	TBD	TBD
SIBR	CCDEBE1	New	SIBR - participant to retrieve final exante bid and commitment	Jul 15, 2019	Oct 1, 2019	TBD	TBD

# Fall 2019 – Commitment Cost and Default Energy Bid Enhancements Ph1

Project Info	Details/Date
Application Software Changes	<p><b>Scope:</b>            Enhances the ability to submit market-based commitment cost bids in order to reflect unique costs and volatility:</p> <ul style="list-style-type: none"> <li>• Support integration of renewable resources through incentivizing flexible resources participation during tight fuel supply</li> <li>• Account for costs of flexible resources (gas and non-gas) to reduce risk of insufficient cost recovery</li> <li>• Encourage participation of non-RA and voluntary EIM resources; compliance with FERC Order 831</li> <li>• Raises energy bid cap from \$1,000/MWh to \$2,000/MWh:</li> <li>• Requires supporting verified costs of energy bids above \$1,000/MWh</li> <li>• <del>Introduces market power mitigation (MPM) measures for commitment costs.</del></li> </ul> <p><b>Impacted Systems:</b></p> <ul style="list-style-type: none"> <li>• SIBR: <del>Incorporate negotiated default commitment bids</del>, allow the submittal of Ex Ante cost adjustments. <del>Increase commitment cost caps</del>, increase energy bid caps, incorporate soft energy bid cap. <del>Allow for hourly submittal of minimum load bids into day-ahead market.</del></li> <li>• IFM/RTM: <del>Add MPM tests for commitment costs. Mitigate commitment costs where tests indicate market power. Incorporate MPM (both energy and commitment) in short term unit commitment process.</del> Recalibrate the penalty price parameters in response to raising energy bid cap to \$2,000/MWh.</li> <li>• CMRI: <del>Provide resource-specific reporting on mitigation results for commitment costs.</del> Provide additional source information for default bids.</li> <li>• MQS/PCA: <del>Incorporate mitigation of commitment costs for specific exceptional dispatch (ED) types. Incorporate bid locking of commitment costs for ED instructions and for certain cases where resources are uneconomic to operating.</del></li> <li>• Master File: Allow submittal of resource-specific minimum load costs for costs that are independent of the Pmin level. Add the ability to indicate preference for new negotiated cost basis type. <del>Provide a view of resource-specific scalars used for validating Ex-Ante cost adjustments.</del></li> <li>• CIDI: <del>Incorporate templates for</del> Submitting request for manual consultation and ex-post default bid adjustments.</li> </ul>

# Fall 2019 – Commitment Cost and Default Energy Bid Enhancements Ph1

Project Info	Details/Date
BPM Changes	<ul style="list-style-type: none"> <li>Market Instruments</li> <li>Market Operations</li> </ul>
Business Process Changes	<ul style="list-style-type: none"> <li>Maintain Major Maintenance Adders (MMG LIII)</li> <li>Maintain Negotiated Default Energy Bids (MMG LIII)</li> <li>Maintain Negotiated O_Ms (MMG LIII)</li> <li>Manage Day Ahead Market (MMG LII)</li> <li>Manage Market Billing Settlements (MOS LII)</li> <li>Manage Real Time Hourly Market (RTPD) (MMG LII)</li> <li>Manage Real Time Operations – Maintain Balance Area (MMG LII)</li> </ul>

Milestone Type	Milestone Name	Dates	Status
Draft Policy	Publish Draft Business Rules externally	Jan 31, 2018	✓
Board Approval	Obtain Board of Governors Approval	Mar 22, 2018	✓
External BRS	Publish revised external BRS	Jan 22, 2019	✓
Config Guides	Config Guide	N/A	
Tech Spec	Publish Technical Specifications	May 17, 2019	
Tariff	File Tariff	Jun 14, 2019	
BPMs	Post Draft BPM changes	Jul 12, 2019	
External Training	Deliver External Training	Jul 11, 2019	
Market Sim	Market Simulation Testing	Jul 15, 2019 - Aug 30, 2019	
Production Activation	CCDEBE	Oct 01, 2019	

# Fall 2019 – ESDER 3A

Project Info	Details/Date
Application Software Changes	<p><b>Scope:</b> The ESDER 3 initiative will include four (4) demand response enhancements:</p> <ul style="list-style-type: none"><li>• New bidding options for demand response resources</li><li>• <del>Removal of single LSE requirement for PDR registrations &amp; removal of default load adjustment (DLA)</del></li><li>• <del>Addition of a Load Shift Product wherein demand response resources with behind the meter (BTM) storage devices can participate in both load consumption and load curtailment.</del></li><li>• <del>Enable sub-metered electric vehicles supply equipment (EVSE) to participate in load curtailment</del></li></ul> <p><b>Implementation Scope for Fall 2019:</b></p> <p><b>Impacted Systems (Overview):</b></p> <p><b>Master File:</b></p> <ul style="list-style-type: none"><li>• RDTs for PDR registrations in MF will require selection of an effective Bid Dispatchable Option to be used for market optimization and dispatch</li><li>• <del>Registration of new PDR Resource Types and business rules for PDRs with BTM storage devices and wanting to participate in both Load Curtailment and Consumption</del></li><li>• <del>Two (2) Resource IDs will be assigned to the same Resource to allow Consumption versus Curtailment participation (PDR-LSR)</del></li></ul> <p><b>DRRS:</b></p> <ul style="list-style-type: none"><li>• <del>PDR registrations will not require all service accounts to have the same LSE</del></li><li>• <del>Allow two resource IDs to be selected for registrations with LSR baseline methods</del></li><li>• <del>New baseline methods for PDR-LSRs and EVSEs</del></li><li>• <del>New attribute for locations to indicate BTM device</del></li></ul> <p><b>SIBR:</b></p> <ul style="list-style-type: none"><li>• <del>Will apply Net-Benefit Test price criteria for PDR bids and reject those not meeting the applicable criteria</del></li><li>• Will not allow Bid Dispatchable Options to be changed in SIBR</li></ul> <p><b>HASP/RTM:</b></p> <ul style="list-style-type: none"><li>• Will use effective Bid Option registered in MF (e.g., 5-min, 15-min or Hourly) for market optimization and dispatch instructions</li><li>• Will broadcast new PDR energy schedules/awards and instructions to downstream applications</li></ul>

# Fall 2019 – ESDER 3A (cont.)

Project Info	Details/Date
Application Software Changes (continued)	<p><b>Settlements:</b></p> <ul style="list-style-type: none"> <li>• <del>Will remove the default load adjustment (DLA) application</del></li> <li>• Will provide Bid Cost Recovery for PDRs with 15-Minute Bids but not Hourly Bids</li> </ul> <p><b>CMRI:</b></p> <ul style="list-style-type: none"> <li>• Will include energy schedules and awards for PDRs with new Bid Dispatchable Options (Existing)</li> </ul> <p><b>GIRA:</b></p> <ul style="list-style-type: none"> <li>• <del>Will prevent the request of NQC for PDR-LSR Consumption resources</del></li> </ul> <p><b>MRI-Settlements (ESDER2 Tariff Compliance):</b></p> <ul style="list-style-type: none"> <li>• New BASE measurement type for monitoring calculated baseline data</li> </ul>
BPM Changes	Market Operations, Market Instruments, Outage Management, Settlements and Billing
Tariff Change	4.13 and 11.6

Milestone Type	Milestone Name	Dates	Status
Board Approval	Obtain Board of Governors Approval	Sep 05, 2018	✓
External BRS	Post External BRS	Feb 11, 2019	✓
	Post Revised External BRS	Feb 25, 2019	✓
	Post Revised External BRS as per scope change for Fall 2019	Mar 18, 2019	
Config Guides	Post Draft Config Guides	May 17, 2019	
Tech Spec	Publish Technical Specifications	May 02, 2019	
Tariff	Post Draft Tariff	Apr 15, 2019	
	File Tariff	Jul 01, 2019	
BPMs	Post Draft BPM changes	Jun 20, 2019	
External Training	External Training	Jul 10, 2019	
Market Sim	Market Sim Window	Jul 15, 2019 – Aug 30, 2019	
Production Activation	ESDER Phase 3	Oct 01, 2019	

# Fall 2019 – RMR and CPM Enhancements

Project Info	Details/Date
<p>Application Software Changes</p>	<p><b><u>Scope:</u> POLICY STAKEHOLDER REVIEW STILL IN PROGRESS</b></p> <p>RMR and CPM Enhancements will address the following policy and tariff amendment scope:</p> <ul style="list-style-type: none"> <li>• Risk-of-Retirement will transition from CPM to RMR Tariff section</li> <li>• RMR units with new contracts shall:               <ul style="list-style-type: none"> <li>Have reliability capacity allocated by TAC Area (for PTOs, not LSEs), Flex RA credit shall be applied</li> <li>Receive Must-Offer Obligation (MOO)</li> <li>Subject to RAAIM</li> <li>Streamline RMR invoicing, settlement process through inclusion in ISO Settlement process</li> </ul> </li> </ul> <p>CPM units shall have pricing formulation for resources offering CPM above soft-offer cap (<a href="#">formulation TBD</a>)</p> <p><b><u>Impacted Systems (Overview):</u></b></p> <p><b>Master File:</b></p> <ul style="list-style-type: none"> <li>• New resource RMR contract type flag to distinguish RMR units with contracts signed prior to (“pre-existing”) vs. after (“new”) the Interim RMR Agreement Tariff Amendment was enacted.</li> </ul> <p><b>CIRA:</b></p> <ul style="list-style-type: none"> <li>• New features to both qualify (e.g. confirm EFC is defined) and allocate System/Local/Flex reliability capacity by TAC Area (for PTOs) for RMR units with new contract type:               <ul style="list-style-type: none"> <li>• Apply Flex RA credit by TAC Area (for PTOs)</li> <li>• Perform RMR Substitution</li> <li>• Support RMR Risk-of-Retirement</li> </ul> </li> <li>• Like RA resources, new contract type RMR units will receive RAAIM status determination</li> </ul> <p><b>SIBR</b></p> <ul style="list-style-type: none"> <li>• Like RA resources, automatically generates cost-based energy bids for new contract type RMR units for un-submitted bid range below RMR contract capacity               <ul style="list-style-type: none"> <li>• Bids will reflect applicable GHG Compliance costs, SC charges, Major Maintenance Adder (MMA), or Opportunity Costs (OC); Note: MMA and OC will only be applied for Unit Commitment/Economic Dispatch decisions in market (will not be recovered in settlement)</li> </ul> </li> <li>• Removes self-schedule requirement for new contract type RMR units scheduled/dispatched in Day-Ahead Market</li> </ul>

# Fall 2019 – RMR and CPM Enhancements (cont.)

Project Info	Details/Date
Application Software Changes	<p><b><u>Impacted Systems (Continued):</u></b></p> <p><b>IFM/RTM:</b></p> <ul style="list-style-type: none"> <li>• Unit Commitment, Economic Dispatch decisions will include applicable MMA and OC</li> <li>• Like RA resources, new contract type RMR units will have automatic RA Obligation (\$0/MWh bids in RUC)</li> </ul> <p><b>Settlements:</b></p> <ul style="list-style-type: none"> <li>• RMR units under new contract type will receive: <ul style="list-style-type: none"> <li>• Replacement of existing RMR invoice and settlement with standard ISO settlement process</li> <li>• Monthly RMR capacity payment (by resource) and cost allocation (by PTO)</li> <li>• RAAIM settlement/allocation</li> <li>• Bid Cost Recovery (does not include MMA or OC)</li> <li>• True-ups for RMR Condition 2 overpayment (does not include MMA or OC)</li> </ul> </li> <li>• CPM units with offers above soft-offer cap may receive true-up based on CPM pricing formulation (<a href="#">formulation TBD</a>)</li> </ul>
BPM Changes	Reliability Requirements, Market Operations, Market Instruments, Settlements and Billing
Tariff Change	11.13, 31.2.2, 34.1, 40.9, 41, 43, 43A, Appendix G

Milestone Type	Milestone Name	Dates	Status
Board Approval	Board of Governors Approval	Mar 28, 2019	
External BRS	Post External BRS	TBD	
Config Guides	Publish Config Guide	TBD	
Tech Spec	Publish Technical Specifications	TBD	
Tariff	File Tariff	TBD	
BPMs	Post Draft BPM changes	TBD	
External Training	Deliver External Training	TBD	
Market Sim	Market Sim Window	Jul 15, 2019 - Aug 30, 2019	
Production Activation	RMR and CPM Enhancements	Oct 01, 2019	



# Fall 2019 – Local Market Power Mitigation Enhancements

Project Info	Details/Date
Application Software Changes	<p><b>Scope:</b> Prevent Flow reversal, Limits transfer, DEB for Hydro, Reference level adjustment process, Gas price Indices</p> <p><b>Impacted Systems:</b></p> <p><b>RTM: prevent flow reversal</b>            Eliminate rule mitigate in FMM carry to RTD            Eliminate rule mitigate for balance of hour for FMM, balance 15 minute for RTD            Use current market competitive LMP for mitigation            Add a nominal parameter to mitigated bids            Mitigated bid = MAX (DEB, Competitive LMP + \$0.xx parameter)</p> <p><b>RTM: Limit transfers to limit Economic Displace</b>            Optional rule for EIM BAA            Limit transfers to the greater of exports in MPM and flexible ramping requirements            Export Limit = MAX [ExportsBase, ExportsMPM, <math>\Sigma FRUMPMAward</math>]            The exporting BAA will receive congestion rents created by this proposed rule</p> <p><b>OASIS: publish Export limit</b></p> <p><b>ECIC:</b> Default Energy Bid for Hydro resource with storage short-term and long-term            Use DA index, BOM index, Monthly future Index, Gas Heat Rate, GPI with customizable inputs on maximum storage horizon and long term bilateral hubs, apply short-term or long-term scalar            Update the reasonableness thresholds            Reference level adjustments gas resource GAS price Indices in DAM: for Mondays by including ICE's Monday-only index            Gas Price Indices to allow as few as one index</p>
BPM Changes	Market Operations, Market Instruments
Tariff Change	Section 29.39, 31.2.1, 39.7

## Fall 2019 – Local Market Power Mitigation Enhancements (cont.)

Milestone Type	Milestone Name	Dates	Status
Board Approval	Board of Governors Approval	Mar 28, 2019	
External BRS	Post External BRS	TBD	
Config Guides	Publish Config Guide	TBD	
Tech Spec	Publish Technical Specifications	TBD	
Tariff	File Tariff	TBD	
BPMs	Post Draft BPM changes	TBD	
External Training	Deliver External Training	TBD	
Market Sim	Market Sim Window	Jul 15, 2019 - Aug 30, 2019	
Production Activation	RMR and CPM Enhancements	Oct 01, 2019	

# Fall 2019 – Energy Imbalance Market Enhancements 2019

Project Info	Details/Date
Application Software Changes	<p><b>Scope:</b> Implement 21 EIM enhancements requested by EIM entities through Customer Inquiry, Dispute and Information system (CIDI)</p> <p><b>Impacted Systems:</b>  <b>BAAOP:</b> Add displays for BAA overview, Unit deviations, Load Bias, transfer limits, contingency flag, timestamps, and other identified items. Enhance sorting and layouts ability. Enhance alarm ability for market thresholds.  <b>BSAP:</b> Enhance capability for Base schedule modification, Add aggregated BS deviation in API.  <b>OASIS:</b> Display ROC limits  <b>RTM/ADS:</b> prevent ETSR swing using explicit triggers. Publish current DOP in the MSG transition period.  <b>Settlement:</b> Publish data for UFE shadow calculation</p>
BPM Changes	Market Instruments Energy Imbalance Market

Milestone Type	Milestone Name	Dates	Status
Board Approval	Obtain Board of Governors Approval	N/A	
External BRS	Milestone: Post External BRS	Feb 05, 2019	✓
Config Guides	Design review - BPM and Tariff SMEs	TBD	
Tech Spec	Create ISO Interface Spec (Tech spec)	TBD	
Tariff	File Tariff	N/A	
BPMs	Post Draft BPM changes	TBD	
External Training	External Training	TBD	
Market Sim	Market Sim Window	Jul 15, 2019 - Aug 30, 2019	
Production Activation	EIM Enhancements 2019	Oct 01, 2019	

# 2020 Spring Release

# Spring 2020 – EIM integrations for SCL, LADWP, and SRP

Project Info	Details/Date
Application Software Changes	Implementation of SCL, LADWP, and SRP as EIM Entities
BPM Changes	EIM BPM will be updated if needed to reflect new modeling scenarios identified during implementation and feedback from SCL, LADWP, and SRP.
Market Simulation	December 2019 – January 2020
Parallel Operations	February 2020 – March 2020

Milestone Type	Milestone Name	Dates	Status
Tariff	File Readiness Certification	March 2020	
Market Sim	Market Sim Window	December 2019 – January 2020	
Parallel Operations	Parallel Operations	February 2020 – March 2020	
Production Activation	EIM – SCL, LADWP, SRP	April 2020	

# 2020 Independent

# 2020 – ADS Replacement

Project Info	Details/Date
Application Software Changes	<ul style="list-style-type: none"> <li>• Transition to web-based user interface to eliminate the need to install thick client</li> <li>• Transition ADS provisioning to the Access and Identity Management (AIM) application including Resource Level Access Controls (RACL) access</li> <li>• The query tool will provide 30 days of historical data</li> <li>• Various user interface enhancements adding content per Operation's request</li> <li>• ADS B2B services changes - TBD.</li> </ul>
BPM Changes	<ul style="list-style-type: none"> <li>• Market Instruments</li> <li>• Market Operations</li> </ul>

Milestone Type	Milestone Name	Dates	Status
Board Approval	Obtain Board of Governors Approval	N/A	
External BRS	Post External BRS	Aug 06, 2018	✓
ADS Update	ADS Update Meeting	Aug 15, 2018	✓
Config Guides	Design review - BPM and Tariff SMEs	N/A	
Tech Spec	Publish Technical Specifications	TBD	
Tariff	File Tariff	TBD	
BPMs	Post Draft BPM changes	TBD	
External Training	Conduct External Training	TBD	
Market Sim	Market Sim Window	Q1/Q2 2020	
Production Activation	ADS Replacement	Q1/Q2 2020	
Production	ADS Parallel Operations	Q1/Q2 2020	
Decommission	Old ADS Decommission	TBD	

# 2020 Fall Release



# Fall 2020 – Day-Ahead Market Enhancements Phase 1

Project Info	Details/Date
Application Software Changes	<p><b>Scope:</b>  <b>Phase 1: 15-minute Granularity DAM</b></p> <ul style="list-style-type: none"> <li>• 15 minute bids in DAM and RTM</li> <li>• 15 minute scheduling and settlement in DAM</li> <li>• 15 minute Base schedule in RTM</li> </ul> <p><b>Impacted Systems:</b>  <b>ALFS:</b> 15 minute Load and VER forecasts  <b>SIBR:</b> SC submit bids for energy, AS in 15 min interval in DAM and RTM, InterSC Trade is in 15 minute  <b>MPM:</b> Market Power Mitigation in 15 minute in DAM  <b>ETCC:</b> <i>Transmission Contract limits in 15 minute interval for DAM</i>  <b>IFM/RUC:</b></p> <ul style="list-style-type: none"> <li>• Calculate AS (RegU, RegD, Spin, NSP) requirements in 15 minute interval</li> <li>• Co-optimize Energy, AS, TD: 15 minute interval</li> <li>• TD+X: hourly intervals, need normalize the cost for mixed intervals</li> <li>• Hourly Block energy scheduling constraint for eligible resources elect the block option, intertie, RDRR and PDR.</li> <li>• AS on interties can only be procured from 15-minute dispatch-able resources</li> </ul> <p><b>BSAP:</b> <i>Submit Base Schedules in 15 minute interval, energy and AS</i>  <b>BASI:</b> <i>Balance test, capacity test, and sufficiency test are in 15 minutes in RTM</i>  <b>RTM:</b> Receive DAM 15 minute award Energy, AS; Receive EIM BAA submit 15 minute base Schedule.  <b>CMRI:</b> report 15 minute IFM awards, include Energy and AS. Base schedule test results by 15 minute interval  <b>OASIS:</b> Display IFM Energy and AS requirements and results in 15 minute intervals; 15-Minute RTM LAP Price report  <b>Settlement:</b></p> <ul style="list-style-type: none"> <li>• All energy, include physical energy supply, virtual supply/demand, load from all resources are settled at the LMP: <math>\lambda + MCC + MLC</math> in 15 minute interval</li> <li>• AS is settled in 15 minute interval</li> <li>• CRR Settled at DAM congestion cost component in 15-minute interval</li> <li>• GMC \$1 divided by 4 for IST</li> <li>• GMC market service portion will apply to AS bids</li> <li>• Administrative price use relevant DAM 15 minute price.</li> <li>• Make whole payment for price correction made to load and block export.</li> <li>• 15 minute bidding exports get BCR</li> </ul> <p><b>EMS:</b> receive DAM schedule in 15 minute interval</p>
BPM Changes	Market Instruments, Market Operations, Energy Imbalance Market (EIM), Settlements & Billing
Tariff Change	Yes

# Fall 2020 – Dispatch Operating Target Tariff Clarification

Project Info	Details/Date
Application Software Changes	<p><b>Scope:</b> Allow Energy Intermittent Resources (EIRs) to automate their response to operational instructions that require the resource not to exceed their `</p> <p><b>Impacted Systems:</b>  <b>RTM:</b> Operator can select EIR resources, system to send Operating instruction Flag to ADS  <b>ADS:</b> Receive Operating instruction flag for EIRs. Broadcast message to EIRs operator.</p>
BPM Changes	Market Instruments Market Operations
Tariff Change	Changes tariff language from “Operating Order” to “Operating Instruction” in multiple sections.

Milestone Type	Milestone Name	Dates	Status
Board Approval	Obtain Board of Governors Approval	Jul 26, 2018	✓
External BRS	Milestone: Post External BRS	Dec 26, 2018	✓
Config Guides	Design review - BPM and Tariff SMEs	N/A	
Tech Spec	Create ISO Interface Spec (Tech spec)	TBD	
Tariff	File Tariff	TBD	
BPMs	Post Draft BPM changes	TBD	
External Training	Deliver external training	TBD	
Market Sim	Market Sim Window	TBD	
Production Activation	Dispatch Operating Target Tariff Clarification	Oct 01, 2020	

# Fall 2020 – Intertie Deviation Settlement

Project Info	Details/Date
Application Software Changes	<p><b>Scope:</b> Implement a new Under/Over Delivery Charge for intertie deviations from Market Schedule and After-The-Fact (ATF) E-Tag, to replace Decline charge</p> <p><b>Impacted Systems:</b> <b>Settlements</b></p> <ul style="list-style-type: none"> <li>• Calculate FMM binding intertie award, exclude Curtailment, calculate under/over delivery quantity as deviation of schedule and ATF E-Tag, Charge under/over delivery Charge at 50% of RTD LMP.</li> <li>• Remove the decline charge calculation and Decline Threshold</li> <li>• Allocate Over/Under delivery charge to measured demand</li> </ul>
BPM Changes	Settlements and Billing
Tariff Change	Section 11.31

Milestone Type	Milestone Name	Dates	Status
Board Approval	Board of Govenors Approval	Feb 07, 2019	✓
External BRS	Post External BRS	TBD	
Config Guides	Post Draft Config Guide	TBD	
Tech Spec	Publish Technical Specifications	TBD	
Tariff	File Tariff	TBD	
BPMs	Post Draft BPM changes	TBD	
External Training	Deliver External Training	TBD	
Market Sim	Market Sim Window	TBD	
Production Activation	Intertie Deviation Settlement	Oct 01, 2020	

# 2021 Spring Release

# Spring 2021 – EIM integrations for PSC-NM and NWE

Project Info	Details/Date
Application Software Changes	Implementation of PSC-NM and NWE as EIM Entities
BPM Changes	EIM BPM will be updated if needed to reflect new modeling scenarios identified during implementation and feedback from PSC-NM and NWE.
Market Simulation	December 2020 – January 2021
Parallel Operations	February 2021 – March 2021

Milestone Type	Milestone Name	Dates	Status
Tariff	File Readiness Certification	March 2021	
Market Sim	Market Sim Window	December 2020 – January 2021	
Parallel Operations	Parallel Operations	February 2021 – March 2021	
Production Activation	EIM – PNM and NWE	April 2021	

# Stay Informed

# Ways to participate in releases

- Visit the Release Planning page
  - <http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx>
- Attend meetings
  - Release Users Group (RUG) bi-weekly meetings
    - Initiative status updates
    - System change updates on independent releases
  - Market Simulation calls
    - Visit the ISO calendar at [www.caiso.com](http://www.caiso.com) for meeting dates and times and add events to your calendar
    - Typically held on Mondays and Thursdays
    - Market sim calls for major releases will be market noticed
  - Market Performance and Planning Forum
    - Bi-monthly review of market performance issues
    - High level discussion of release planning, implementation and new market enhancements

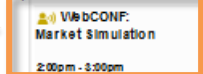
# What to look for on the calendar...

## Calendar of Meetings, Training and Events

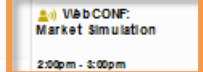
Month: February Year: 2018 Calendar View List View Print View

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	5 WebbCONF: Market Simulation 2:00pm - 3:00pm	6 Training: Get to Know the ISO - Day 1 9:00am - 4:00pm WebbCONF: Imbalance Conformance Enhancements 10:00am - 12:00pm WebbCONF: Technical User Group 10:00am - 11:00am	7 Deadline: Comments - Interconnection Process Enhancements 2018 - Issue Paper and Meeting Discussion Training: Get to Know the ISO - Day 2 9:00am - 4:00pm Meeting: Flexible Resource Adequacy Criteria Must Offer Obligation Phase 2 - Revised Draft Flexible Capacity Framework 10:00am - 4:00pm WebbCONF: Market Settlement User Group 10:00am - 11:00am	8 Meeting: Audit Committee Teleconference (Executive) 3:30pm - 6:30pm Training: Settlements 101 9:00am - 4:00pm Meeting: 2017-2018 Transmission Planning Process 10:00am - 4:00pm WebbCONF: Market Simulation 2:00pm - 3:00pm	9 Training: Settlements 201 9:00am - 4:00pm	10
11 WebbCONF: Participating Transmission Owner Per Unit Cost Guides 10:30am - 12:00pm WebbCONF: Market Simulation 2:00pm - 3:00pm	12 Meeting: Congestion Revenue Rights Auction Efficiency 10:00am - 4:00pm WebbCONF: Release User Group 10:00am - 11:00am Call: Energy Imbalance Market Governing Body Teleconference (Executive) 11:30am - 12:30pm	13 Deadline: Submissions - April 2018 Monthly Resource Adequacy and Supply Plans Call: Congestion Revenue Rights 11:00am - 11:30am WebbCONF: Outage Management System Customer Partnership Group 2:00pm - 3:00pm	14 Deadline: Comments - Review Transmission Access Charge Structure Straw Proposal and Meeting Discussion Call: Board of Governors Teleconference (General) 3:15pm - 6:00pm Call: Board of Governors Teleconference (Executive) 9:00am - 10:00am Call: Market Update 10:15am - 11:00am WebbCONF: Market Simulation	15	16	17

Market Sim



Market Sim



Release Users Group (RUG)

