



Settlement User Group

December 23, 2020

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

Web Conference Information	Conference Call Information
<p>Web Address: https://caiso.webex.com/meet/settlementuser</p> <p>Meeting Number: 961 854 046</p> <p>Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter your phone number you will use during the call. You will be called by the conference shortly.</p>	<p>US Toll Free: 1-844-517-1271</p> <p>US Toll : +1- 682-268-6591</p> <p>Access Code: 961 854 046</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 publically available on the ISO web page for a limited time following the meeting. The recording, and any related transcriptions, should not be reprinted without the ISO's permission. Hyperlinks in blue in PDF copy.

The recording will be posted on our website and be available for a short period of time until Jan 6, 2021.

Please mute your phone and do not put it on hold while the discussion is going on in order to eliminate background noise. There will be an opportunity to ask questions after each topic, but before asking your question, please state your name and affiliation. Thank you.



mute



Settlement User Group Agenda



Wednesday, December 23, 2020

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

Time	Topic	Presenter
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- | | | |
|-----------------|---|---|
| ▪ 10:00 – 10:05 | ▪ Welcome and Introduction | ▪ Tyler DuBeshter |
| ▪ 10:05 – 11:00 | ▪ Settlements <ul style="list-style-type: none">▪ RC Services▪ Q4 2020 - Settlement Release Milestones▪ Winter Market Simulation Settlement Updates▪ PRR and BPM Update▪ Customer Readiness 2021 Training | ▪ Assad Al- Baijat
▪ Brenda Corona
▪ Radha Madrigal |

RC Services update

RC Services

- Informational Statement timeline:
 - **COMPLETED:** Customers external to CAISO BAA submit 2019 NEL/NG data in MRI-S between 9/3/2020 – 9/30/2020
 - **COMPLETED:** Informational Statement will publish 10/30/2020
 - **COMPLETED:** Customer review and re-submit 2019 data (if needed) by 11/30/2020
- Statement and Invoice published on 01/04/2021
 - Payment is due by 02/03/2021
 - Note: there are some due date exceptions per contract
- RC West Payment Calendar: <http://www.caiso.com/Documents/RCWestAnnualPaymentsCalendar.pdf>

HANA Services

- No updates

Winter/Q4 2020 – Settlement Release Milestones

- Release Scope:
 - Day Ahead Nodal (NPM project)
 - Intertie Deviation Settlement (IDS)
 - EIM Enhancement: Symmetrical Wheeling
 - Production defects detailed in release component summary
- 3rd draft configuration output file (pre market sim) posted - **10/9**
- 4th draft configuration output file posted – **10/29**
 - IDS calc granularity change from MW to MWh
- **Additional unplanned draft configuration output files posted – 11/19 + 11/23**
 - **11/19 change for IDS:** re-activate a previously terminated energy flag and adjust two formulas in CC 6456:
 - the 15 min deviation quantity to ensure 0 output when transmission profile > HASP and
 - the final accept quantity to consider auto acceptance, which defaults to HASP award
 - **11/23 change for Sym Wheeling:** defect correction impacting CCs 6985 & 69850 to ensure accurate settlement of base ETSR marginal loss amounts
- **Market sim in progress:** please stay informed by participating in both:
 - [Market Simulation web conferences](#) each Monday & Thursday 2-3pm
 - [Release User Group \(RUG\)](#) web conference, every other Tuesday 10-11am
- Pre-prod configuration output file + release artifacts posted – **12/10**
- Production deployment – **12/17**
 - IDS + Sym Wheeling effective date = 2/1/2021

Independent Market Simulation

- Visit CAISO.com at Stay Informed>Release Planning>Independent 2020
- Upcoming meeting will be on Thursday, December 24 at 2pm.
- <http://www.caiso.com/Documents/MarketSimulationSettlementsCalendar-IndependentWinter2020Release.pdf>

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Web Conference Information

Web address: <https://caiso.webex.com/meet/MarketSim>

Conference Call Information (*New Dial in numbers*)

New US Toll Dial-In number: 682-268-6591

New US Toll-Free Dial-In Number: 844-517-1271

Access Code: 962 067 710

Hours: Monday thru Friday 0900-1800 PDT

ISO's 24x7 Service Desk: (916) 351-2309 (Connectivity –UI or API)

Issues called in after hours will be worked on during the next business day

Winter Market Simulation Settlements Updates

[Market Sim Calendar Link](#)

Calendar Day	Day	CMRI T+1B	Submit Meter Data by T+3B 18:00 for Initial	Publish Initial Statement T+6B	Submit Meter Data by T+6B 18:00 for Recalc	Publish Recalc Statement T+9B	Publish Market Invoice
			T+9B	T+9B	T+70B	T+70B	
07-Dec-20	Monday		2-Dec	Monthly Initial 17-Nov - 24-Nov			Daily Initial 17-Nov, 24-Nov Monthly Initial 17-Nov - 24-Nov
08-Dec-20	Tuesday		3-Dec				
09-Dec-20	Wednesday	8-Dec		1-Dec	1-Dec	24-Nov	
10-Dec-20	Thursday			2-Dec	2-Dec	Monthly Recalc 17-Nov - 24-Nov	Daily Recalc 17-Nov, 24-Nov Monthly Recalc 17-Nov - 24-Nov
11-Dec-20	Friday	10-Dec	8-Dec	3-Dec	3-Dec		
12-Dec-20	Saturday						
13-Dec-20	Sunday						
14-Dec-20	Monday			Monthly Initial 01-Dec - 03-Dec		1-Dec	Daily Initial 01-Dec, 02-Dec, 03-Dec Monthly Initial 01-Dec - 03-Dec
15-Dec-20	Tuesday		10-Dec			2-Dec	
16-Dec-20	Wednesday	15-Dec		8-Dec	8-Dec	3-Dec	
17-Dec-20	Thursday					Monthly Recalc 01-Dec - 03-Dec	
18-Dec-20	Friday	17-Dec	15-Dec	10-Dec	10-Dec		
19-Dec-20	Saturday						
20-Dec-20	Sunday						
21-Dec-20	Monday			Monthly Initial 08-Dec - 10-Dec		8-Dec	Daily Initial 08-Dec, 10-Dec Monthly Initial 08-Dec - 10-Dec Daily Recalc 01-Dec, 02-Dec, 03-Dec Monthly Recalc 01-Dec - 03-Dec
22-Dec-20	Tuesday		17-Dec			10-Dec	
23-Dec-20	Wednesday	22-Dec		15-Dec	15-Dec	Monthly Recalc 08-Dec - 10-Dec	
24-Dec-20	Thursday						

Winter Market Simulation Settlements Updates (cont.)

[Market Sim Calendar Link](#)



Market Simulation Calendar Nov 02, 2020 through Jan 31, 2021

Calendar Day	Day	CMRI T+1B	Submit Meter Data by T+3B 18:00 for Initial T+9B	Publish Initial Statement T+6B T+9B	Submit Meter Data by T+6B 18:00 for Recalc T+70B	Publish Recalc Statement T+9B T+70B	Publish Market Invoice
06-Jan-21	Wednesday	5-Jan				22-Dec	
07-Jan-21	Thursday	6-Jan				Monthly Recalc 15-Dec - 22-Dec	Daily Initial 15-Dec, 22-Dec Monthly Initial 15-Dec - 22-Dec Daily Recalc 08-Dec, 10-Dec Monthly Recalc 08-Dec - 10-Dec
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09-Jan-21	Saturday						
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11-Jan-21	Monday		6-Jan				Daily Recalc 15-Dec, 22-Dec Monthly Recalc 15-Dec - 22-Dec
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14-Jan-21	Thursday			6-Jan	6-Jan		
15-Jan-21	Friday	14-Jan	12-Jan	7-Jan	7-Jan		
16-Jan-21	Saturday						
17-Jan-21	Sunday						
18-Jan-21	Monday	ISO Holiday					
19-Jan-21	Tuesday			Monthly Initial 5-Jan - 7-Jan		5-Jan	
20-Jan-21	Wednesday	19-Jan	14-Jan			6-Jan	Daily Initial 05-Jan, 06-Jan, 07-Jan Monthly Initial 05-Jan - 07-Jan
21-Jan-21	Thursday			12-Jan	12-Jan	7-Jan	
22-Jan-21	Friday	21-Jan	19-Jan			Monthly Recalc 5-Jan - 7-Jan	
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24-Jan-21	Sunday						
25-Jan-21	Monday			14-Jan	14-Jan		
26-Jan-21	Tuesday		21-Jan	Monthly Initial 12-Jan - 14-Jan		12-Jan	
27-Jan-21	Wednesday				19-Jan		Daily Initial 12-Jan, 14-Jan Monthly Initial 12-Jan - 14-Jan Daily Recalc 05-Jan, 06-Jan, 07-Jan Monthly Recalc 05-Jan - 07-Jan
28-Jan-21	Thursday			19-Jan		14-Jan	

Market Simulation Settlements Updates



MarketSim@caiso.com

Day Ahead Nodal Pricing Model

- **Timeline:** October 6 –November 13 (CMRI)
- **Structured:** October 20 -October 22
- Structured Scenarios document - http://www.caiso.com/Documents/NPM_structured_mktsim-Reviewed.pdf

Intertie Deviation Settlement

- **Timeline:** December 1- Jan 15, 2021 with Production date Feb 1, 2021
- **Structured:** December and December 2, 2nd attempt Jan 2021
- Please use <https://demo.caiso.tag.oati.com/> to submit tags in Map Stage environment
- Structured Scenarios document - <http://www.caiso.com/Documents/MarketSimulationScenariosIntertieDeviationSettlement.pdf>

Symmetrical Wheeling

- **Timeline:** November 17 – Jan 15, 2021 with Production date Feb 1, 2021
- Unstructured Scenario – December 1
- <http://www.caiso.com/Documents/MarketSimulationScenariosSymmetricalSettlementForWheelingThroughEimBAAs.pdf>

EIM Enhancements 2020

- **Timeline** December 15- December 29 (CMRI)
- Unstructured Scenarios document <http://caiso.com/documents/marketsimulationscenariosenergyimbalancemarket2020enhancements.pdf>

PRR and BPM Updates

PRR	Title	Status for all
1292	To support the Intertie Deviation Settlement initiative, configuration revisions to incentivize acceptance and delivery of intertie market awards to reduce adverse impact to grid stability and market pricing.	Published the BPM Library PRRs 1292-1300 and 1306-1308
1293	To support the anticipated changes stemming from the EIM Enhancements 2020 initiative, configuration revisions to provide symmetrical settlement for wheeling through EIM BAAs by settling all Base ETSR schedule deviations at an EIM BAA intertie at an SP-Tie LMP.	
1294	To support the Day-ahead nodal pricing model (NPM) initiative, configuration revisions to provide advisory settlement for NPM resources and SCs that participate in the NPM which ensure no commingling with financially binding settlement.	
1295	To support the slow demand response enhancement, documentation changes to include business rule for comparing resource locational marginal price to day ahead bid price for slow demand response resources in cases where exceptional dispatch type of non TModel Exceptional Dispatch Type, which result to a document only change and utilizing current active settlement configuration	

PRR and BPM Updates (con't)

PRR	Title	Status for all
1296	Retroactive configuration adjustment to RMR capacity payments to ensure that RUC commitment costs are considered in the calculation for the combined RUC and RTM excess revenues.	Published the BPM Library PRRs 1292-1300 and 1306-1308
1297	To support the excess behind the meter production initiative, configuration enhancements to account for new energy measurement type excess behind the meter production and to settle charges to non-participating load.	
1298	Updated settlement and billing business practice manual for market settlements timeline transformation initiative	
1299	Retroactive configuration correction to the Spin/Non-Spin No Pay quantity calculation that ensures accurate accounting for fast start units deemed offline in real time.	
1300	Updated charge code 6045 over and under scheduling energy imbalance market settlement in the business rules to align with incremental price is applied for under scheduling with current configuration	

PRR and BPM Updates (con't)

PRR	Title	Status for all
1306	Updated BPM configuration guides for enforcement protocol charge group charge code 1591, 1592, and 1593 to accommodate charge code 1593 associated with daily statements	Published the BPM Library PRRs 1292-1300 and 1306-1308
1307	Updated multiple BPM configuration guides to accommodate updating the procedure that documents the steps for submitting the transmission revenue requirement detail to the CAISO required for updating transmission access charge rates	
1308	To support energy imbalance market enhancements 2020, specifically symmetrical wheeling configuration changes to real time marginal losses offset energy imbalance market	

ISO Computer Based Training Programs

Visit [caiso.com](http://www.caiso.com) **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>

Computer Based Training – Settlements

There are more than [30](#) computer based training modules on the ISO website covering:

RC Customer Settlements	http://www.caiso.com/CBT/RC-Settlements/index.html
Energy Settlements Validation Practice	http://www.caiso.com/CBT/EnergySettlementsValidation/story.html
Settlement Validation Practice	http://www.caiso.com/CBT/Settlements%20Validation%20Practice/story_html5.html
Commitment Costs	http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html
Settlements foundational concepts (EIM)	https://www.westerneim.com/CBT/Settlements%20Foundational%20Concepts/Settlements-FoundationalConcepts.html
Metering Overview	http://www.caiso.com/CBT/MeteringOverview/MeteringOverview.html
Settlements Process	http://www.caiso.com/CBT/SettlementsProcess/story_html5.html
Market Pricing - New	http://www.caiso.com/CBT/Market-Pricing/story.html

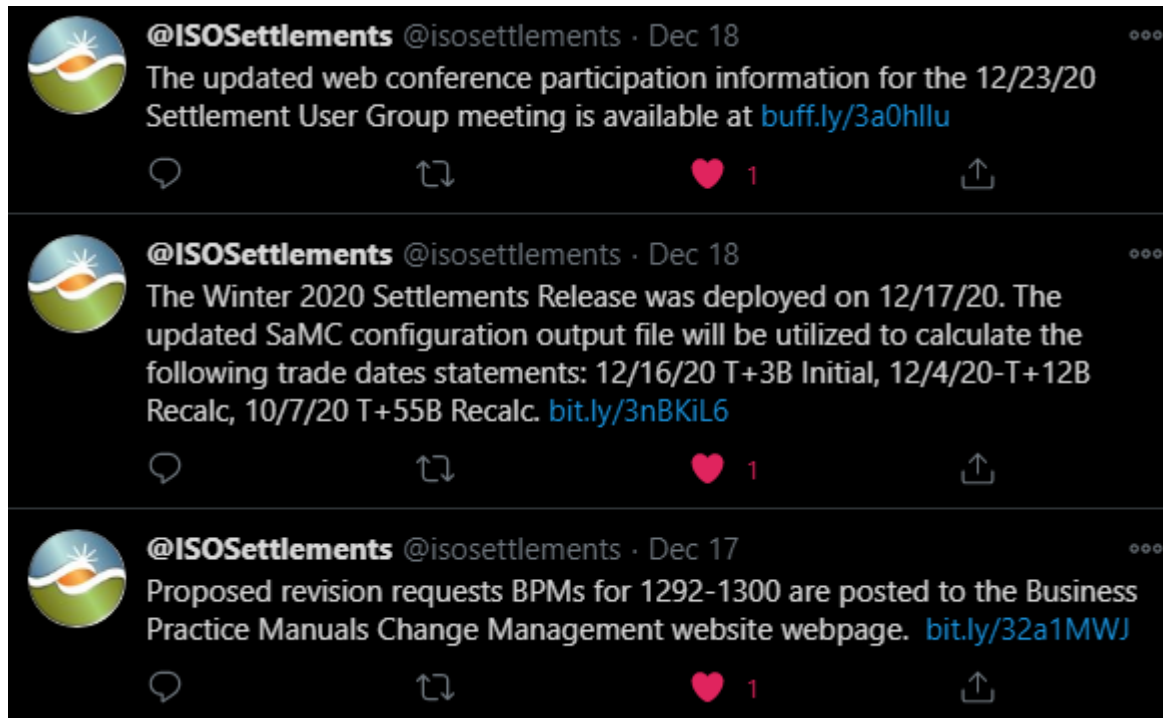
New initiatives training course on the learning center web page and retooling Settlements trainings

Webinars

Welcome to the ISO (Webinar)	January 14, 2021
Intro to ISO Workshop (Virtual workshop)	March 2-3, 2021 (9am-12pm)
Market Transactions (Virtual workshop)	March 9-10, 2021 (9am-12pm)
ISO Settlements (Virtual workshop)	March 16-17, 2021 (9am-12pm)



Recent Tweets



The screenshot displays three tweets from the account @ISOSettlements. Each tweet includes the account's profile picture, name, handle, and date. The tweets contain text announcements with links to external resources. Each tweet also shows interaction icons for replies, retweets, and likes, with one like visible on each.

@ISOSettlements @isosettlements · Dec 18
The updated web conference participation information for the 12/23/20 Settlement User Group meeting is available at buff.ly/3a0hllu

@ISOSettlements @isosettlements · Dec 18
The Winter 2020 Settlements Release was deployed on 12/17/20. The updated SaMC configuration output file will be utilized to calculate the following trade dates statements: 12/16/20 T+3B Initial, 12/4/20-T+12B Recalc, 10/7/20 T+55B Recalc. bit.ly/3nBKil6

@ISOSettlements @isosettlements · Dec 17
Proposed revision requests BPMs for 1292-1300 are posted to the Business Practice Manuals Change Management website webpage. bit.ly/32a1MWJ

WebEx Update

New dial-in phone numbers

 **No change** to WebEx URL: <https://caiso.webex.com/meet/settlementuser>

New Dial In information

Dial-in Number: (682)-268-6591

Toll- Free Dial-in Number: (844)-517-1271

Access Code: 961 854 046

Settlement User Group Calendar 2021

Market Services

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on www.caiso.com and follow us on Twitter @ISOSettlements



California ISO

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Meeting
 Agenda posted
 Holiday

Thank you all for a great year!

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Meeting
 Agenda posted
 Holiday

Next SUG : January 6, 2021

at 10:00 A.M



Settlement References

- Settlement User Group Calendar 2021
- Release Training Information for Settlements
- Knowledge Articles
- ISO Settlements Twitter Page
- Ways to Participate in Settlements

Settlement User Group Calendar 2021

Market Services

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on www.caiso.com and follow us on Twitter @ISOSettlements



California ISO

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Meeting
 Agenda posted
 Holiday

Follow us on Twitter @ISOSettlements for our latest updates

Release Training Information for Settlements

Project Presentation Links

[Hybrid Resources Phase 1](#)

[Intertie Deviation Settlement](#)

[Excess Behind the Meter Production](#)

[Market Settlement Timeline Transformation](#)

[FERC 841 – Requested Adjustments](#)

[Energy Storage and Distributed Energy Resources 3B](#)

[Commitment Costs and Default Energy Bid Enhancements](#)

Access Video to trainings on <http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>

Click here  Training calendar

Knowledge Articles

CAISO has posted **Knowledge Articles** for FAQs in CIDI.

To access the articles in CIDI, you either:

Option 1: Type in the keyword “**Identify**” in the search field to pull up the article, or

Option 2: Click on the **Knowledge Articles** tab, and then click the **Settlements and Metering** category link to pull up a list of the Settlements related articles.

Posted Knowledge Articles to date:

- RC rate location
- RC Informational Statement
- RC services charge
- 2019 prorated RC charge
- Payment calendar
- ED-DPMIN
- After-the-Fact EIM Manual Dispatches from ISO systems
- Validate Mitigated prices in DA, RTPD (FMM) and RTD *-New*
- Calculation of meter data for TG resources *-New*
- Pricing node (Pnode) price used for CRR Settlement *-New*

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Identifying after-the-fact EIM manual dispatches from ISO systems
000001275 - Last Modified Oct 14, 2019 4:23 PM
An EIM organization can identify a manual dispatch after the fact using ADS, the ED and CMRI...How can an Energy Imbalance Market (EIM) organization identify, after-the-fact, whether there

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 - Settlement User Group (SUG) bi-weekly meetings
 - Release User Group
 - Market Sim Conference Calls
 - Initiative status with settlement updates
 - <http://www.caiso.com/StakeholderProcesses/>
 - [System change with settlement updates on independent releases](#)
- BPM PRR Change Management monthly web meeting
 - Settlement and Billing BPM status updates
 - <http://bpmcm.caiso.com/Pages/default.aspx>
 - <http://www.caiso.com/rules/Pages/BusinessPracticeManuals/Default.aspx>
 - <http://www.caiso.com/Documents/ISO-AcronymList.pdf>

Settlement User Group

Thank you for participating in our call

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