



# Settlement User Group

November 25, 2020

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/settlementuser">https://caiso.webex.com/meet/settlementuser</a></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>Dial-in Number: (866) 528-2256</p> <p>International Dial-in: (216) 706-7052</p> <p>Access Code: 673 78 64</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 Dec 10, 2020.

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, November 25, 2020

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

Time	Topic	Presenter
------	-------	-----------

- |                 |   |   |
|-----------------|---|---|
| ▪ 10:00 – 10:05 | ▪ Welcome and Introduction  | ▪ Brenda Corona   |
| ▪ 10:05 – 11:00 | ▪ Settlements <ul style="list-style-type: none"><li>▪ RC Services</li><li>▪ Null Price Component for Specific SP-Tie and Recover the 20B prices for 4/28 and 5/6 on OASIS</li><li>▪ Delay in Invoicing 2021 Annual Auction</li><li>▪ Q4 2020 - Settlement Release Milestones</li><li>▪ Winter Market Simulation Settlement Updates</li><li>▪ Symmetrical Wheeling Update</li><li>▪ PRR and BPM Update</li></ul> | ▪ Yanni Chen<br><br>▪ Brenda Corona<br><br>▪ Assad Al- Baijat<br>▪ Luis Cantos<br>▪ Brenda Corona |

# 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
  - 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.aiso.com/Documents/RCWestAnnualPaymentsCalendar.pdf>

## HANA Services

- No updates

## Null Price Component for Specific SP-Tie

- Null price component is shown on OASIS for NAVAJO\_ASR-APND/CRYSTAL500\_NAVAJJO SP-Tie for some intervals between 4/28/2020 to 8/3/2020 due to a modeling issue.
- All constituent Pnodes for NAVAJO\_ASR-APND were retired from the model since 4/22/2020 when their corresponding generator units were retired. This SP/Tie is associated with a shared resource that should have been retired when those generator units were retired.
- Shared resource retired on 9/11/2020 after this issue was identified.
- No financial impact on the null price component.

## Recover the 20B prices for 4/28 and 5/6 on OASIS

- Due to a business processing issue, some of the DA prices for trade day 5/6/2020 and some of the HE 21 INT 1 RTPD prices for trade day 4/28/2020 were modified on 6/24/2020.
- The modification was after the 20 business days hence it's not valid.
- Those prices were reverted to their 20 business day values on 11/10/2020.
- Price recovering message was sent to OASIS on 11/10/2020.

## Delay in Invoicing 2021 Annual Auction

Due to a processing issue with the 2021 Annual CRR Auction awards, the CAISO will need to settle the 2021 Annual CRR auction awards on the **T+12B recalculation statement** instead of the T+3B initial statement for trade day 11/11/2020. The invoice for the 2021 Annual CRR auction was supposed to be included on the Market Invoice which was published on 11/18/2020 but due to this processing issue it will now be included on the Market Invoice which will be published on 12/9/2020 with the T+12B recalculation statement for trade day 11/11/2020, with a due date of 12/15/2020.

The CRR auction invoicing schedule has been updated and is located at: <http://www.caiso.com/market/Pages/Settlements/Default.aspx>.

If you have any questions please send them to [crrdata@caiso.com](mailto:crrdata@caiso.com) or [settlementuser@caiso.com](mailto:settlementuser@caiso.com).

# 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
- 3<sup>rd</sup> draft configuration output file (pre market sim) posted - **10/9**
- 4<sup>th</sup> 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 of 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 to post - **12/9**
- Production deployment - **12/16**

# Independent Market Simulation

- Visit CAISO.com at Stay Informed>Release Planning>Independent 2020
- Upcoming meeting will be on Tuesday, November 30 at 2pm and extending to end of December and no meeting on *Thanksgiving Day*.

November							December						
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29	30								1	2	3	4	5
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## Web Conference Information

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

Meeting number: 962 067 710

## Conference Call Information ( *Will change on December 18* )

- Dial-in Number: 866-528-2256
- International Dial-in: 216-706-7052
- Access Code: 202 249 0



# Winter Market Simulation Settlements Updates

## Market Simulation Calendar - Winter 2020 Release Oct 05, 2020 through Nov 13, 2020

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
02-Nov-20	Monday		28-Oct			20-Oct	
03-Nov-20	Tuesday					21-Oct	
04-Nov-20	Wednesday					Monthly Recalc 20-Oct - 21-Oct	Daily Recalc 13-Oct, 14-Oct Monthly Recalc 13-Oct - 14-Oct  Daily Initial 20-Oct, 21-Oct Monthly Initial 20-Oct - 21-Oct
		3-Nov		27-Oct	27-Oct		
05-Nov-20	Thursday			28-Oct	28-Oct		
06-Nov-20	Friday	5-Nov	3-Nov	Monthly Initial 27-Oct - 28-Oct			
07-Nov-20	Saturday						
08-Nov-20	Sunday						
09-Nov-20	Monday					27-Oct	
10-Nov-20	Tuesday		5-Nov			28-Oct	
11-Nov-20	Wednesday					Monthly Recalc 27-Oct - 28-Oct	Daily Recalc 20-Oct, 21-Oct Monthly Recalc 20-Oct - 21-Oct  Daily Initial 27-Oct, 28-Oct Monthly Initial 27-Oct - 28-Oct
		10-Nov		3-Nov	3-Nov		
12-Nov-20	Thursday						
13-Nov-20	Friday	12-Nov	10-Nov	5-Nov	5-Nov		
14-Nov-20	Saturday						
15-Nov-20	Sunday						
16-Nov-20	Monday			Monthly Initial 03-Nov - 05-Nov		3-Nov	Daily Initial 03-Nov, 05-Nov Monthly Initial 03-Nov - 05-Nov
17-Nov-20	Tuesday		12-Nov				
18-Nov-20	Wednesday					5-Nov	Daily Recalc 27-Oct, 28-Oct Monthly Recalc 27-Oct - 28-Oct
				10-Nov	10-Nov		
19-Nov-20	Thursday					Monthly Recalc 03-Nov - 05-Nov	
20-Nov-20	Friday			12-Nov	12-Nov		
21-Nov-20	Saturday						
22-Nov-20	Sunday						
23-Nov-20	Monday						Daily Recalc 03-Nov, 05-Nov Monthly Recalc 03-Nov - 05-Nov  Daily Initial 10-Nov, 12-Nov Monthly Initial 10-Nov - 12-Nov
				Monthly Initial 10-Nov - 12-Nov		10-Nov	
24-Nov-20	Tuesday						
25-Nov-20	Wednesday					12-Nov	Daily Recalc 10-Nov, 12-Nov Monthly Recalc 10-Nov - 12-Nov
						Monthly Recalc 10-Nov - 12-Nov	

# Winter Market Simulation Settlements Updates



## 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
16-Nov-20	Monday			Monthly Initial 03-Nov - 05-Nov		3-Nov	Daily Initial 03-Nov, 05-Nov Monthly Initial 03-Nov - 05-Nov
17-Nov-20	Tuesday		12-Nov				
18-Nov-20	Wednesday	17-Nov		10-Nov	10-Nov	5-Nov	
19-Nov-20	Thursday					Monthly Recalc 03-Nov - 05-Nov	
20-Nov-20	Friday	19-Nov	17-Nov	12-Nov	12-Nov		
21-Nov-20	Saturday						
22-Nov-20	Sunday						
23-Nov-20	Monday			Monthly Initial 10-Nov - 12-Nov		10-Nov	Daily Recalc 03-Nov, 05-Nov Monthly Recalc 03-Nov - 05-Nov  Daily Initial 10-Nov, 12-Nov Monthly Initial 10-Nov - 12-Nov
24-Nov-20	Tuesday		19-Nov				
25-Nov-20	Wednesday	24-Nov		17-Nov	17-Nov	12-Nov Monthly Recalc 10-Nov - 12-Nov	Daily Recalc 10-Nov, 12-Nov Monthly Recalc 10-Nov - 12-Nov
26-Nov-20	Thursday			<b>ISO Holiday</b>			
27-Nov-20	Friday			<b>ISO Holiday</b>			
28-Nov-20	Saturday						
29-Nov-20	Sunday						
30-Nov-20	Monday						
01-Dec-20	Tuesday		24-Nov	19-Nov	19-Nov		
02-Dec-20	Wednesday	1-Dec				17-Nov	
03-Dec-20	Thursday						
04-Dec-20	Friday	3-Dec	1-Dec	24-Nov	24-Nov	19-Nov	

# Winter 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](http://www.caiso.com/Documents/NPM_structured_mktsim-Reviewed.pdf)

## Intertie Deviation Settlement

- **Timeline:** December 1-December 18
- **Structured:** December 1
- 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 –December 15
- Unstructured Scenario = December 1
- <http://www.caiso.com/Documents/MarketSimulationScenariosSymmetricalSettlementForWheelingThroughEimBAAs.pdf>

## EIM Enhancements 2020

- **Timeline** November 23- December 7 (CMRI)
- Unstructured Scenarios document <http://caiso.com/documents/marketsimulationsscenariosenergyimbalancemarket2020enhancements.pdf>

# Symmetrical Wheeling Updates

6985 – PRR 1292

- Update 1 existing formula
- Terminate 2 formulas

69850- New PRR 1308

- Update 1 existing formula

External Implications:

- Base ETSRs' Marginal Loss Amounts are double counted and will be reflected on their statements.

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.	<ul style="list-style-type: none"><li>✓ <a href="#">Market notice</a> was sent 10/30/20</li><li>✓ Initial comments expired on 11/13/20</li><li>✓ Recommendation comment period expires on 12/10/20</li><li>✓ BPM Meeting on 12/22 at 11 a.m.</li></ul>
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.	

# PRR and BPM Updates (con't)

PRR	Title	Status for all
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	<ul style="list-style-type: none"> <li>✓ <a href="#">Market notice</a> was sent 10/30/20</li> <li>✓ Initial comments expired on 11/13/20</li> </ul>
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.	<ul style="list-style-type: none"> <li>✓ Recommendation comment period expires on 12/10/20</li> </ul>
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.	<ul style="list-style-type: none"> <li>✓ BPM Meeting on 12/22 at 11 a.m.</li> </ul>
1298	Updated settlement and billing business practice manual for market settlements timeline transformation initiative	

# PRR and BPM Updates (con't)

PRR	Title	Status for all
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.	✓ <a href="#">Market notice</a> was sent 10/30/20
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	✓ Initial comments expired on 11/13/20
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	✓ Recommendation comment period expires on 12/10/20
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	✓ BPM Meeting on 12/22 at 11 a.m.
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>

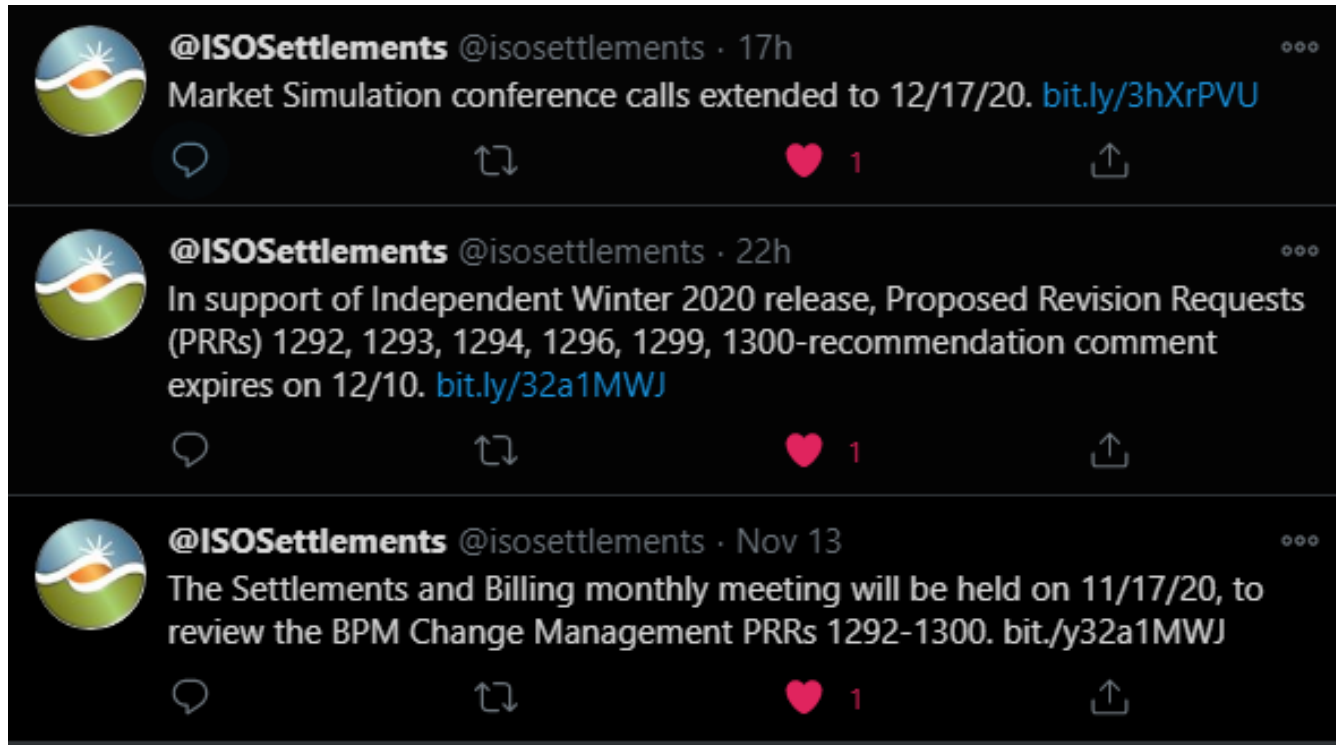
Computer Based Training – Settlements	
There are more than <a href="#">30</a> computer based training modules on the ISO website covering:	
RC Customer Settlements	<a href="http://www.caiso.com/CBT/RC-Settlements/index.html">http://www.caiso.com/CBT/RC-Settlements/index.html</a>
Energy Settlements Validation Practice	<a href="http://www.caiso.com/CBT/EnergySettlementsValidation/story.html">http://www.caiso.com/CBT/EnergySettlementsValidation/story.html</a>
Settlement Validation Practice	<a href="http://www.caiso.com/CBT/Settlements%20Validation%20Practice/story_html5.html">http://www.caiso.com/CBT/Settlements%20Validation%20Practice/story_html5.html</a>
Commitment Costs	<a href="http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html">http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html</a>
Settlements foundational concepts (EIM)	<a href="https://www.westerneim.com/CBT/Settlements%20Foundational%20Concepts/Settlements-FoundationalConcepts.html">https://www.westerneim.com/CBT/Settlements%20Foundational%20Concepts/Settlements-FoundationalConcepts.html</a>
Metering Overview	<a href="http://www.caiso.com/CBT/MeteringOverview/MeteringOverview.html">http://www.caiso.com/CBT/MeteringOverview/MeteringOverview.html</a>
Settlements Process	<a href="http://www.caiso.com/CBT/SettlementsProcess/story_html5.html">http://www.caiso.com/CBT/SettlementsProcess/story_html5.html</a>
New initiatives training course on the learning center web page and retooling Settlements trainings	

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





## Recent Tweets



The screenshot displays three tweets from the account @ISOSettlements. Each tweet includes a profile picture of a stylized sun over a green field, the account name, a timestamp, the main text of the tweet, and a link. Below each tweet are icons for replying, retweeting, liking (with a count of 1), and sharing.

- Tweet 1:** @ISOSettlements @isosettlements · 17h  
Market Simulation conference calls extended to 12/17/20. [bit.ly/3hXrPVU](https://bit.ly/3hXrPVU)
- Tweet 2:** @ISOSettlements @isosettlements · 22h  
In support of Independent Winter 2020 release, Proposed Revision Requests (PRRs) 1292, 1293, 1294, 1296, 1299, 1300-recommendation comment expires on 12/10. [bit.ly/32a1MWJ](https://bit.ly/32a1MWJ)
- Tweet 3:** @ISOSettlements @isosettlements · Nov 13  
The Settlements and Billing monthly meeting will be held on 11/17/20, to review the BPM Change Management PRRs 1292-1300. [bit.ly/y32a1MWJ](https://bit.ly/y32a1MWJ)

# Upcoming WebEx Update

Current audio conferencing Dial-in information and phone numbers **will change for SUG beginning December 23.**

- No change to WebEx URL: <https://caiso.webex.com/meet/settlementuser>
- **The updated web conference participation information for the 12/23/20 Settlement User Group meeting will be posted 12/18**

## Current Dial In information

Dial-in Number: (866) 528-2256

International Dial-in Number: (216) 706-7052

Access Code: 673 78 64

# Settlement User Group Calendar

## 2 MEETINGS LEFT THIS YEAR

### 2020

Market Services

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on [www.caiso.com](http://www.caiso.com).



# California ISO

January						
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Meeting
  Agenda posted
  Holiday

# Settlement User Group Calendar 2021

2021

Market Services

Settlement User Group Meetings



California ISO

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

January						
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February						
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July						
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August						
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September						
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October						
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November						
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December						
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Meeting
  Agenda posted
  Holiday

Follow us on Twitter @ISOSettlements for our latest updates

# Next SUG : December 9, 2020

at 10:00 A.M



# Settlement References

- Release Training Information for Settlements
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- ISO Settlements Twitter Page
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# 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*

The screenshot shows the California ISO Help Center interface. At the top, there are navigation links for 'California ISO', 'Help Center', 'Knowledge articles', and 'Cases'. A search bar is prominently displayed with the text 'Identifying' entered. Below the search bar, the search results are shown. On the left, there is a sidebar with 'Search Results' and a list of categories: 'All', 'Knowledge', 'Cases', and 'Collapse List'. An orange arrow points to the 'Knowledge' category. The main content area shows the search results for 'Identifying', with the first result being 'Identifying after-the-fact EIM manual dispatches from ISO systems'. The result includes a date '000001275 - Last Modified Oct 14, 2019 4:23 PM' and a snippet of text: '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'.



# ISO Settlements Twitter

- Settlement related updates
- Market sim updates
- Note: Will not replace any existing media communications
- Please take the opportunity to follow [@ISOSettlements on Twitter](https://twitter.com/ISOSettlements) by downloading the Twitter application to **any mobile device**
- Twitter feed can be accessed on **any web browser**
- **No account required** to view the Twitter feed and posts
- Save twitter page as a Favorite on your tab



# Ways to participate in settlements

- ISO Settlements Twitter Page
  - <https://twitter.com/isosettlements>
- Visit the Settlements page
  - <http://www.caiso.com/market/Pages/Settlements/Default.aspx>
- Attend web conference meetings
  - 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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Follow us on Twitter  @ISO Settlements