



BPM Change Management Meeting

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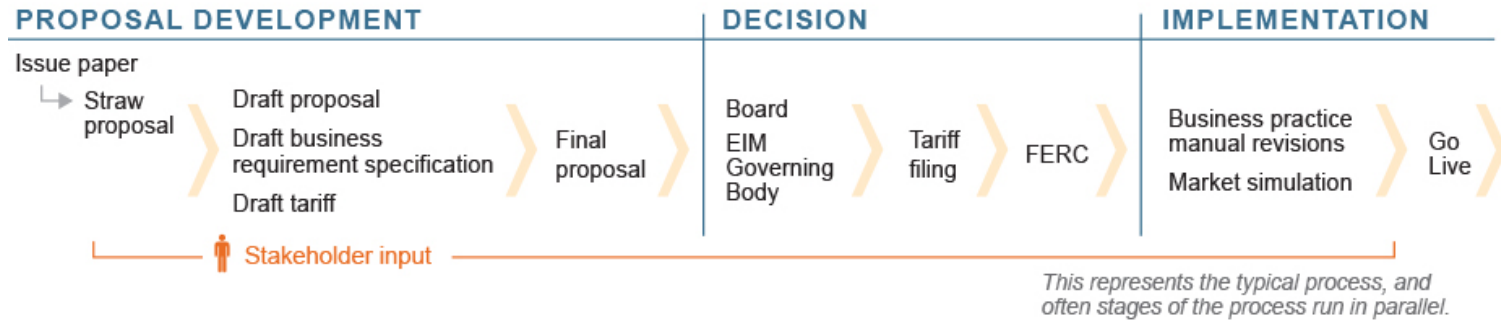
Agenda – BPM Change Management Meeting

December 17, 2019

Topic	Presenter
Introduction / Meeting Overview	Isabella Nicosia
Discussion of active proposed changes:	
Generator Interconnection and Deliverability Allocation Procedures BPM	Phelim Tavares
Congestion Revenue Rights BPM	Jim McClain
Settlements and Billing BPM	Bonnie Peacock
Outage Management BPM	Kalyani Abhyankar
Generator Management BPM	Debi Le Vine
Market Instruments BPM	Jamal Batakji
Market Operations BPM	Jamal Batakji
Demand Response BPM	Pia Sok
Transmission Planning Process BPM	Jeff Billinton
Credit Management and Market Clearing BPM	Christina Billing
Wrap-Up and Next Steps	Isabella Nicosia

BPM Change Management Process
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California ISO Stakeholder Initiative Process



- Business Practice Manuals
 - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
 - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
 - *Policy changes submitted through the PRR process will be referred to the policy initiative road map process.*
 - Each subject area in a BPM is based on enabling language in the ISO tariff.
 - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

Generator Interconnection and Deliverability Allocation Procedures BPM

PRR	PRR Title	Stage
1218	2018 interconnection process enhancements-affected systems clarifications, cost responsibility updates, and reliability network upgrades reimbursement cap updates	Initial
1206	Updates to project name guidelines, downsizing process, and affidavits for allocation	Recommendation

PRR 1218 – 2018 interconnection process enhancements-affected systems clarifications, cost responsibility updates, and reliability network upgrades reimbursement cap updates

- Reason for revision
 - Affected PTO repayment clarifications, network upgrade and cost responsibility updates, and RNU reimbursement cap updates
- Initial comments:
 - SDG&E; submitted 12/11/19
- Initial comment period expired:
 - December 11, 2019
- Next step:
 - Post recommendation

PRR 1206 – Updates to project name guidelines, downsizing process, and affidavits for allocation

- Reason for revision
 - Updates to project name guidelines, downsizing process, and affidavits for allocation
- Recommendation comments:
 - SDG&E; submitted 12/06/19
- Recommendation comment period expired:
 - December 11, 2019
- Next step:
 - Post final decision

Congestion Revenue Rights BPM

PRR	PRR Title	Stage
1217	Clarification of congestion revenue rights processes 2019	Initial

PRR 1217 – Clarification of congestion revenue rights processes 2019

- Reason for revision
 - Updated sections to provide further clarification about the CRR process
- Initial comments:
 - SCE; submitted 12/11/19
- Initial comment period expired:
 - December 11, 2019
- Next step:
 - Post recommendation

Settlements and Billing BPM

PRR	PRR Title	Stage
1216	Update the settlement charge code to adjust the effective date of the shaping functionality for static and dynamic energy transfer system resources back to 4/4/2018	Initial
1215	Updated BPM configuration guides for charge code 6700 congestion revenue rights hourly settlement and charge code 6701 monthly congestion revenue rights true-up to resolve CRR notional amount processing issue for the CRR monthly true-up	Initial
1202	Update Real Time Marginal Losses Offset CC 6985 to properly calculate The Total Real Time Market UFE Marginal Loss Amount by Balancing Authority Areas; and the output section of CG PC Real Time Congestion for EIMBAATotalUFEQuantity	Recommendation

PRR 1216 – Update the settlement charge code to adjust the effective date of the shaping functionality for static and dynamic energy transfer system resources back to 4/4/2018

- Reason for revision
 - Due to a dispute, a portion of the changes for real time market neutrality that was previously released as part of 2019 Fall Release, specifically the shaping functionality for static and dynamic ETSRs will be updated to have an effective date of 4/4/18.
 - The ISO anticipates implementation of the BPM changes on or about December 11, 2019, with a retroactive effective date 4/4/2018.
- Initial comments:
 - No comments submitted to date
- Initial comment period expired:
 - December 11, 2019
- Next step:
 - Post recommendation

PRR 1215 – Updated BPM configuration guides for charge code 6700 congestion revenue rights hourly settlement and charge code 6701 monthly congestion revenue rights true-up to resolve CRR notional amount processing issue for the CRR monthly true-up

- Reason for revision
 - The current configuration is causing a mismatch between monthly and daily runs. A configuration issue has been raised where the monthly initial CRR Notional amount does not reflect the daily initial CRR Notional amount. Instead, the monthly initial CRR Notional amount reflected the latest data available when we initiated the monthly run.
 - The new configuration will address this issue. In particular, CC 6701 (monthly CRR) will rely on a new CC 6700 daily calculation. CC 6700 will be updated to capture the daily Notional inputs. In addition, similar formulas will be created for Clawback and Circular Schedule.
 - The effective trade date of the change is 12/1/2019, with a planned implementation date of 11/25/2019.
- Initial comments:
 - No comments submitted to date
- Initial comment period expired:
 - December 11, 2019
- Next step:
 - Post recommendation

PRR 1202 – Update Real Time Marginal Losses Offset CC 6985 to properly calculate The Total Real Time Market UFE Marginal Loss Amount by Balancing Authority Areas; and the output section of CG PC Real Time Congestion for EIMBAATotalUFEQuantity.

- Reason for revision:
 - A neutrality issue was identified and was isolated to the calculation of The Total Real Time Market UFE Marginal Loss Amount by Balancing Authority Areas under “CC6985”. The quantity used in the formula was missing the BAA attribute which led to neutrality issues because amount was not getting allocated to the appropriate BAAs. The proposed solution is to update the Quantity component with the correct Bill Determinant that has BAA attribute.
 - The current quantity being used to calculate The Total Real Time Market UFE Marginal Loss Amount by Balancing Authority Areas which is an output from the “PC Real Time Congestion” is erroneously described in the output section of the said Pre Calc. The update made here is documentation only changes to reflect the correct attribute sets for the bill determinant.
 - Production deployment date was 10/30/2019 with a 12/1/2015 effective date.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - December 11, 2019
- Next step:
 - Post final decision

Outage Management BPM

PRR	PRR Title	Stage
1214	Discovery date/time for forced outages	Initial

PRR 1214 – Discovery date/time for forced outages

- Reason for revision
 - The ISO is providing additional language to capture the existing process of submission of discovery date/time for forced outages.
- Initial comments:
 - PG&E; submitted 12/03/19
- Initial comment period expired:
 - December 11, 2019
- Next step:
 - Post recommendation

Generator Management BPM

PRR	PRR Title	Stage
1213	Termination of negotiated bids upon retirement	Initial
1211	Deliverability transfer modifications	Initial
1205	Clarifying assessment required upon retirement if storage unit desires to remain	Recommendation

PRR 1213 – Termination of negotiated bids upon retirement

- Reason for revision
 - At the request of DMM, the change is to adjust the BPM to explain that MQCRA/DMM will terminate negotiated values such as MMAs when a resource termination is effective.
- Initial comments:
 - No comments submitted to date
- Initial comment period expired:
 - December 11, 2019
- Next step:
 - Post recommendation

PRR 1211 – Deliverability transfer modifications

- Reason for revision
 - Revisions are due to the final FERC order for 2018 Interconnection Procedure Enhancements (IPE) implementation.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - December 6, 2019
- Next step:
 - Post recommendation

PRR 1205 – Clarifying assessment required upon retirement if storage unit desires to remain

- Reason for revision
 - With the addition of storage to existing generation, the CAISO desires to clarify the process required when the existing generator requests to retire the unit(s). This is the existing retirement process that CAISO wants to document in the BPM.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - December 11, 2019
- Next step:
 - Post final decision

Market Instruments BPM

PRR	PRR Title	Stage
1212	Major maintenance adders during scheduling coordinator change	Initial
1208	Fixed transportation rate attachment C	Recommendation
1203	Commitment cost default energy bid enhancements BPM changes	On hold

PRR 1212 – Major maintenance adders during scheduling coordinator change

- Reason for revision
 - This is to clarify the business processes surrounding the treatment of Major Maintenance Adders. In the situation of a scheduling coordinator change, the ISO proposes to provide the new scheduling coordinator a 30-day grace period during which they may be eligible to use a temporary MMA value. Effective date is after the PRR cycle ends
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - December 6, 2019
- Next step:
 - Post recommendation

PRR 1208 – Fixed transportation rate attachment C

- Reason for revision
 - This change clarifies that if a gas transportation company offers a fixed rate for transportation, the CAISO's calculation of transportation costs in the fuel region prices will not include the fixed rate component and only include applicable volumetric components.
 - Reason: This is to clarify the CAISO calculation of transportation cost in a fuel region in attachment C. Effective date 1/1/2020.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - December 11, 2019
- Next step:
 - Post final decision

PRR 1203 – Commitment cost default energy bid enhancements BPM changes

- Reason for revision
 - This update is for adding functionality to make Reference Level Change Requests and re-defines Proxy Costs and Default Bids through the Commitment Cost and Default Energy Bid initiative (CCDEBE).
 - Effective: 12/4/2019.
- This PRR has been put on hold, as CCDEBE will not move forward into implementation until after the ISO receives a final FERC order.

Market Operations BPM

PRR	PRR Title	Stage
1210	Methodology for satisfying non-performance of pay for performance regulation requirements	Initial

PRR 1210 – Methodology for satisfying non-performance of pay for performance regulation requirements

- Reason for revision
 - Provide an additional method for satisfying the Regulation recertification requirement in the event of a resource’s failure to meet the minimum performance threshold for one or more months of a calendar quarter. Effective date is as soon as the PRR process cycle is completed.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - December 6, 2019
- Next step:
 - Post recommendation

Demand Response BPM

PRR	PRR Title	Stage
1209	Appendix B table updates to include meter generation output and footnotes to the measurement types, load, and meter before meter after (MBMA)	Recommendation

PRR 1209 – Appendix B table updates to include meter generation output and footnotes to the measurement types, load, and meter before meter after (MBMA)

- Reason for revision
 - Appendix B table updates to include meter generation output and footnotes to the measurement types, load, and meter before meter after (MBMA).
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - December 11, 2019
- Next step:
 - Post final decision

Transmission Planning Process BPM

PRR	PRR Title	Stage
1207	Update for electromagnetic transient model submission extension	Recommendation

PRR 1207 – Update for electromagnetic transient model submission extension

- Reason for revision
 - The CAISO is updating Section 10 of the BPM for Transmission Planning Process to establish a process for Participating Generators to request deadline extensions for the submission of EMT models to the CAISO and applicable PTOs. The CAISO requires all affected Participating Generators to follow this process for requesting such extensions, limited only to submission of EMT models.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - December 11, 2019
- Next step:
 - Post final decision

Credit Management and Market Clearing BPM

PRR	PRR Title	Stage
1204	Revisions related to updated language for reliability must run contracts	Recommendation

PRR 1204 – Revisions related to updated language for reliability must run contracts

- Reason for revision
 - Revisions related to updated language for RMR Contracts which includes updates related to legacy RMR invoices and deviation interest calculations and banking changes for RMR contracts vs legacy RMR contracts.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - December 11, 2019
- Next step:
 - Post final decision

