



BPM Change Management Meeting

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November 16, 2021

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Housekeeping reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.
- Meeting is structured to stimulate honest dialogue and engage different perspectives.
- Please keep comments professional and respectful.

New instructions for raising your hand to ask a question

- If you are connected to audio through your computer or used the “call me” option, select the raise hand icon  above the chat window located on bottom right corner of the screen. **Note:** #2 only works if you dialed into the meeting.
- Please remember to state your name and affiliation before making your comment.
- If you need technical assistance during the meeting, please send a chat to the event producer.

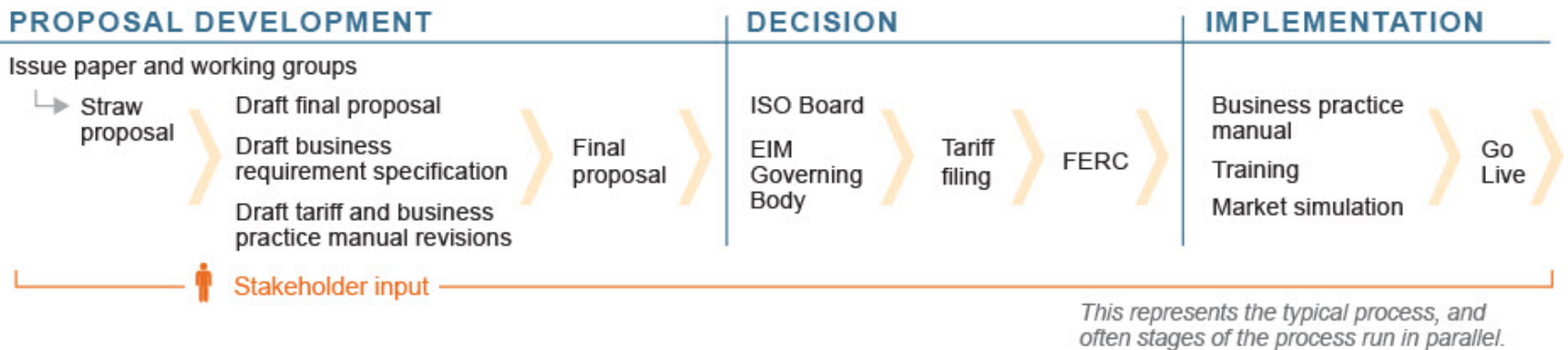
Agenda – BPM Change Management Meeting

November 16, 2021

Topic	Presenter
Introduction / Meeting Overview	Nicole Hines
Discussion of active proposed changes: Energy Imbalance Market BPM Market Operations BPM Market Instruments BPM Congestion Revenue Rights BPM Scheduling Coordinator Certification and Termination BPM Candidate CRR Holder Registration BPM Direct Telemetry BPM Settlements and Billing BPM Generator Management Generator Interconnection and Deliverability	Jamal Batakji Jamal Batakji Jamal Batakji Jacob Fox Nicole Hines Nicole Hines Mike Ucol Brenda Corona Jill Jordan Daune Wilson
Wrap-Up and Next Steps	Nicole Hines

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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.*

Energy Imbalance Market BPM

PRR	PRR Title	Stage
1389	Excluding outlier data from energy imbalance market uncertainty histograms	Recommendation

PRR 1389 – Excluding outlier data from energy imbalance market uncertainty histograms

- Reason for revision
 - This update is to establish a guideline to aid the EIM entities in determining when and how to request exclusion of outlier data.
- Recommendation comments:
 - Comment received from SRP 11/12/21 requesting data samples
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

Market Operations BPM

PRR	PRR Title	Stage
1387	Hybrid resources phase 2 updates related to Market Operation BPM	Recommendation
1382	Energy storage and distributed resources phase 4 updates related to market operations BPM	Recommendation

PRR 1387 – Hybrid resources phase 2 updates related to Market Operation BPM

- Reason for revision
 - Building on phase 1, this Hybrid resources is related to phase 2A of the initiative. The enhancement of this phase will focus on how hybrid generation resources can operate within the ISO markets. Targeted for Fall release 2021.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

PRR 1382 – Energy storage and distributed resources phase 4 updates related to market operations BPM

- Reason for revision
 - This is to enhance the ability of Energy Storage and Distributed Resources to participate in the ISO market. One document, we added a new paragraph describing the end of hour state of charge bid parameter in real time market. In the second document we provided some edits to section 6.5.4 and referenced all DEB related topics to attachment D in Market Instruments BPM.
 - Target Date: 11/1/21
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

Market Instruments BPM

PRR	PRR Title	Stage
1393	Variable operations and maintenance cost changes	Initial
1386	Hybrid resources phase 2 updates related to Market Instrument BPM	Recommendation
1381	Energy storage and distributed resources phase 4 updates related to market instrument BPM	Recommendation

PRR 1393 – Variable operations and maintenance cost changes

- Reason for revision
 - These edits to the BPM for Market Instruments are to provide guidance to Scheduling Coordinators on the Variable Operations and Maintenance Adders introduced in the VOM Cost Review stakeholder initiative. Target date: 1/1/22.
- Initial comments:
 - Comment received by SRP 11/12/21 on clarifying language.
 - ISO Responded and will edit language based on comment
- Initial comment period expired:
 - November 12, 2021
- Next step:
 - Post Recommendation

PRR 1386 – Hybrid resources phase 2 updates related to Market Instrument BPM

- Reason for revision
 - Building on phase 1, this Hybrid resources is related to phase 2A of the initiative, the enhancement of this phase will focus on how hybrid generation resources can operate within the ISO markets. Targeted for Fall release 2021.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

PRR 1381 – Energy storage and distributed resources phase 4 updates related to market instrument BPM

- Reason for revision
 - This is to enhance the ability of Energy Storage and Distributed Resources to participate in the ISO market. This includes enhancement to the Default Energy Bids calculations for the storage resources related to energy costs, variable costs, and price based opportunity costs.
 - Target Date: 11/1/21
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

Congestion Revenue Rights BPM

PRR	PRR Title	Stage
1388	Market data availability on market user interface	Recommendation

PRR 1388 – Market data availability on market user interface

- Reason for revision
 - New process addressing the time period after a market run that the public download files will be available on the market user interface.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

Scheduling Coordinator Certification and Termination

PRR	PRR Title	Stage
1385	Scheduling coordinator update for document submission process	Recommendation

PRR 1385 – Scheduling coordinator update for document submission process

- Reason for revision
 - The reason for revision is to add information on how to submit documentation through CIDI which started in July of 2021. Also updated minor wording and links for accuracy. Effective date will be 11/30/2021
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

Candidate CRR Holder Registration BPM

PRR	PRR Title	Stage
1384	Additional information for congestion revenue rights holder self-termination	Recommendation

PRR 1384 – Additional information for congestion revenue rights holder self-termination

- Reason for revision
 - The reason for this revision is to include additional information for CRR Holders wishing to self-terminate and clarifying that once letter is submitted, no additional CRR auction participation is allowed. Effective date is 11/30/21.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

Direct Telemetry BPM

PRR	PRR Title	Stage
1390	Eligible intermittent resource definition update	Initial
1380	High sustainable limit	Recommendation

PRR 1390 – Eligible intermittent resource definition update

- Reason for revision
 - Eligible intermittent resource definition update
- Initial comments:
 - No comments submitted to date
- Initial comment period expired:
 - November 12, 2021
- Next step:
 - Post Recommendation

PRR 1380 – High sustainable limit

- Reason for revision
 - Sections 6.1, 8.4.2 and 14.1 have been updated to include new Telemetry requirements related to the Hybrid Resources initiative.
- Recommendation comments:
 - No comments submitted to date
- Recommendation comment period expired:
 - November 12, 2021
- Next step:
 - Post Final Decision

Settlements and Billing BPM

PRR	PRR Title	Stage
1383	Update regulation no pay pre-calculation to change data source for dispatch operating target calculation quantity	Recommendation

PRR 1383 – Update regulation no pay pre-calculation to change data source for dispatch operating target calculation quantity

- Reason for revision
 - Based on the couple of disputes received, calculation of DOT Calculation Flag in EMS PI system is inaccurate and not aligned with settlement requirement. We have better source data to get similar information.
 - Configuration guide for PC Regulation No Pay Quantity has been updated to for the new data source and related configuration change were included.
 - The fix will be deployed on or about October 27, 2021. The effective date will be Trade Date 12/1/2021.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - October 19, 2021
- Next step:
 - Post final decision

Generator Management

PRR	PRR Title	Stage
1392	Minor language update to BPM for Generator Management	Initial

PRR 1392 – Update regulation no pay pre-calculation to change data source for dispatch operating target calculation quantity

- Reason for revision
 - These edits to the BPM for Generator Management are to conform terminology with the VOM Cost Review initiative.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - November 12, 2021
- Next step:
 - Post Recommendation

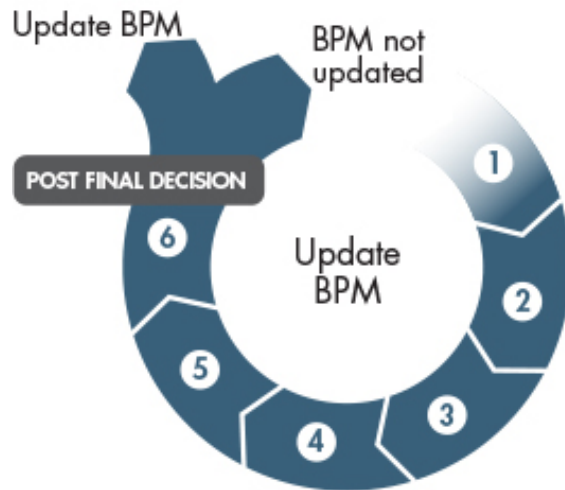
Generator Interconnection and Deliverability Allocation Procedures

PRR	PRR Title	Stage
1391	Transmission plan deliverability clarification	Initial

PRR 1391 – Transmission plan deliverability clarification

- Reason for revision
 - Clarify that capacity effectuated through the CAISO's modification processes may seek an allocation for TP Deliverability.
- Initial comments:
 - Comment from Westlands Solar Park on TP Deliverability schedule.
 - The TP Deliverability schedule will proceed on the usual schedule. The 2022-2023 cycle will not be skipped.
- Initial comment period expired:
 - November 12, 2021
- Next step:
 - Post Recommendation

Next BPM PRR Review Monthly Meeting: December 28, 2021 @ 11 a.m.



- 1 SUBMIT PRR**
Proposed Revision Request (PRR) submitted to the ISO
- 2 COMMENTS PERIOD**
Upon ISO acceptance, PRR becomes public and 10-business day comment period starts
- 3 STAKEHOLDER MEETING**
PRR details and comments reviewed and discussed
- 4 RECOMMENDATION**
ISO recommendation issued on PRR
- 5 COMMENTS ON RECOMMENDATION**
10-business day comment period open on recommendation
- 6 STAKEHOLDER MEETING ON RECOMMENDATION**
PRR recommendation and comments reviewed

BPM change management
process questions:
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