



# BPM Change Management Meeting

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- Please keep comments professional and respectful.

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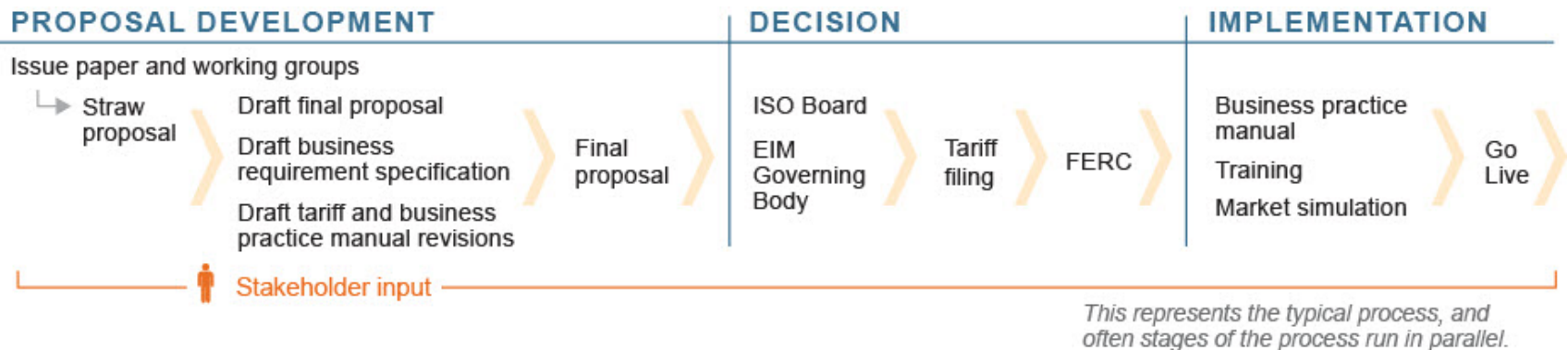
# Agenda – BPM Change Management Meeting

## October 25, 2022

Topic	Presenter
Introduction / Meeting Overview	Christina Costa
<p><b>Discussion of active proposed changes:</b></p> <ul style="list-style-type: none"> <li>Demand Response</li> <li>Rules of Conduct Administration</li>   <li>Generator Interconnection and Deliverability Allocation Procedures</li> <li>Reliability Requirements</li> <li>Generator Management</li> <li>Market Operations</li> <li>Market Instruments</li> <li>Energy Imbalance Market</li> <li>Settlements and Billing</li> </ul>	<ul style="list-style-type: none"> <li>Hewayda Ahmed, Elaine Siegel</li> <li>Angelica Stahl, Kathleen Fernandez</li> <li>Daune Wilson</li> <li>Melanie Bogen</li> <li>Jill Jordan</li> <li>Michael Martin</li> <li>Michael Martin</li> <li>Michael Martin</li> <li>Massih Ahmadi</li> </ul>
Wrap-Up and Next Steps	Christina Costa

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.*

# Demand Response BPM

PRR	PRR Title	Stage
1465	2.1 Product Overview 8 Generation Data Template (GRDT) Submission and Processing Appendix H	Recommendation
1472	Updates to section 15 of the demand response BPM	Initial

# PRR 1465: 2.1 Product Overview 8 Generation Data Template (GRDT) Submission and Processing Appendix H

- Reason for revision
  - Clarification for an EIMs use of the RDRR model
  - FRP Refinement Initiative: Change the bid dispatchable election default
  - Reliability Demand Response Resource (RDRR) Track 2 Initiative: Change the minimum load curtailment threshold, provide directions for entities seeking approval to exceed the threshold through the attestation process, add an attestation template (Attachment H) for entities to complete and submit for approval
- Recommendation Comments: SCE
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# PRR 1472: Updates to section 15 of the demand response BPM

- Reason for revision
  - Version 10 of the Demand Response BPM contains updates to Section 15 - Outages. The update is a correction to the language to align it with the OMS BPM. Version 10 of the Demand Response BPM is effective 9/29/2022.
- Initial Comments: None
- Initial comment period expired: October 18, 2022
- Next step: Post Recommendation



# Rules of Conduct Administration BPM

PRR	PRR Title	Stage
1469	Renaming of tariff section 37.5.2	Initial

# PRR 1469: Renaming of tariff section 37.5.2

- Reason for revision
  - Changing Tariff Section 37.5.2 name in BPM to match the Tariff change that is proposed in the bucket filing.
- Initial Comments: None
- Initial comment period expired: October 18, 2022
- Next step: Post Recommendation

# Generator Interconnection and Deliverability Allocation Procedures BPM

PRR	PRR Title	Stage
1464	Remainder of 2021 interconnection process enhancements initiative phase one changes	Recommendation

# PRR 1464: Remainder of 2021 interconnection process enhancements initiative phase one changes

- Reason for revision
  - Incorporate remainder of anticipated tariff changes resulting from the 2021 Interconnection Process Enhancement Initiative Phase I changes.
- Recommendation Comments: Golden State Clean Energy
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# Reliability Requirements BPM

PRR	PRR Title	Stage
1451	Clarification for price taking exports	Recommendation

# PRR 1451: Clarification for price taking exports

- Reason for revision
  - Section 7.1.4 was updated to match the updated tariff section 40.6.6.
  - Sections 9.2.2.1 and 9.3.1.1 were added to provide clarification to SCs on how to deal with outages on PT exports in both the planned and forced timeframes.
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# Generator Management BPM

PRR	PRR Title	Stage
1470	Updates to accommodate how the CAISO publishes queue management-related study results	Initial

# PRR 1470: Updates to accommodate how the CAISO publishes queue management-related study results

- Reason for revision
  - Updates to accommodate how the CAISO publishes queue management-related study results
- Initial Comments: SDG&E
- Initial comment period expired: October 18, 2022
- Next step: Post Recommendation



# Energy Imbalance Market BPM

PRR	PRR Title	Stage
1468	Small changes to unaccounted for energy and resource sufficiency evaluation demand response attestation forms	Initial

# PRR 1468: Small changes to unaccounted for energy and resource sufficiency evaluation demand response attestation forms

- Reason for revision
  - Small changes to the Unaccounted for Energy (UFE) Election and Resource Sufficiency Evaluation (RSE) Demand Response attestation letters.
- Initial Comments: None
- Initial comment period expired: October 18, 2022
- Next step: Post Recommendation

# Market Instruments BPM

PRR	PRR Title	Stage
1467	Reliability demand response resource enhancements phase 2 supporting resource data template Changes	Initial

# PRR 1467: Reliability demand response resource enhancements phase 2 supporting resource data template Changes

- Reason for revision
  - Reliability demand response resource enhancements phase 2 supporting resource data template Changes
- Initial Comments: None
- Initial comment period expired: October 18, 2022
- Next step: Post Recommendation

# Market Operations BPM

PRR	PRR Title	Stage
1462	Change to loss sensitivity calculation	Recommendation
1463	Clarification on reference buses used in the market power mitigation	Recommendation
1466	Reliability demand response resource enhancements Phase 2	Initial
1471	Updates for hybrid resources phase 2b policy initiative	Initial

# PRR 1462: Change to loss sensitivity calculation

- Reason for revision
  - Loss sensitivity calculation is to determine the incremental change in losses due to an incremental injection at a specific location that is balanced by an appropriate adjustment at the incremental slack location. The current approach uses a single slack bus for the incremental slack location to for loss sensitivities then converts to a distributed load slack basis. The new approach maintains Net Scheduled Interchange (NSI) as a fixed variable for each Balancing Area.
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# PRR 1463: Clarification on reference buses used in the market power mitigation

- Reason for revision
  - Clarification that if a reference bus is disconnected due to an outage, a distributed load reference bus will be used.
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# PRR 1466: Reliability demand response resource enhancements Phase 2

- Reason for revision
  - BPM changes that support the Reliability demand response resource enhancements Phase 2 project that adjusts the Pmin and Minimum Load Cost (MLC) for discrete RDRRs.
- Initial Comments: None
- Initial comment period expired: October 18, 2022
- Next step: Post Recommendation



# PRR 1471: Updates for hybrid resources phase 2b policy initiative

- Reason for revision
  - Updates that support the Hybrid Resource Phase 2b project including ACC Constraint structures, market processes, Dynamic limits, examples and diagrams.
- Initial Comments: SCE
- Initial comment period expired: October 18, 2022
- Next step: Post Recommendation

# Settlements and Billing BPM

PRR	PRR Title	Stage
1452	RUC No Pay Quantity Pre-Calculation	Recommendation
1453	Updated BPM Configuration guide for CC 8831 Monthly Resource Adequacy Availability Incentive Mechanism Allocation to accommodate documentation updates	Recommendation
1454	Settlement configuration changes to support Hybrid Resources Phase 2B initiative and ensure hybrid resources selecting ISO forecast receive forecast fee and are exempted from generic RA	Recommendation

# Settlements and Billing BPM

PRR	PRR Title	Stage
1455	Update configuration guide documentation only to reflect Central Procurement Entity initiative settlement	Recommendation
1456	Update BPM for CC 4515 to correct input description for bid segment attribute value for self-schedules to match as configured	Recommendation
1457	Update configuration guides for Real-Time Ancillary Services Imports Congestion to resolve quantity issue for retroactive trade dates	Recommendation
1458	Updated charge codes 64600 and 64700 real-time dispatch and fifteen minute market instructed imbalance energy, energy imbalance market to accurately account for energy transfer system resources in the current price and current quantity of each charge code	Recommendation

# Settlements and Billing BPM

PRR	PRR Title	Stage
1459	Updated charge codes 64600 and 64700 real-time dispatch and fifteen minute market instructed imbalance energy, energy imbalance market to accurately account for energy transfer system resources in the current price and current quantity of each charge code	Recommendation
1460	Implemented changes to the flexible ramp product charge codes in accordance with the flexible ramping product deliverability initiative	Recommendation
1461	Settlement configuration changes to unaccounted for energy charge code 64740 to support western energy imbalance market enhancements to ensure correct settlement of generation only balancing authority area western energy imbalance market entities.	Recommendation

# PRR 1452: Updated multiple BPM Configuration guides to accommodate subtracting Regulation energy from meter when evaluated against Expected Energy

- Reason for revision
  - For June 2021, SDG3 RA resource disputed RUC No Pay Settlement amount of about \$4,500. The dispute was denied since the existing configuration aligns with the tariff. However, Legal agreed to an enhancement going forward and will include this issue in the next tariff clarifications filing for purposes of clarity. Going forward, anywhere we compare meter to Total Expected Energy (TEE), we will subtract regulation energy from meter. This impacts Spin Non-Spin No Pay PC and RUC No Pay PC. The effective trade date of the change is 12/1/2022 and the anticipated implementation date is 10/26/2022
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# PRR 1453: Updated BPM Configuration guide for CC 8831 Monthly Resource Adequacy Availability Incentive Mechanism Allocation to accommodate documentation updates

- Reason for revision
  - Dispute research determined that documentation updates are required. The change is required in order to remove Internal Configuration Guide (ICG) formulas that have been correctly end dated on the design template while still existing on the ICG. Configuration updates are not required. CC 8831 Monthly Resource Adequacy Availability Incentive Mechanism Allocation is impacted. The effective trade date is 8/1/2018
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# PRR 1454: Settlement configuration changes to support Hybrid Resources Phase 2B initiative and ensure hybrid resources selecting ISO forecast receive forecast fee and are exempted from generic RA.

- Reason for revision
  - The Configuration changes are needed to support the new phase of Hybrid Resources Phase 2B and correct an implementation from Hybrid Resources 1B. New component data availability for hybrid resources as part of phase 2B required updates to the Forecasting Service Fee charge code, and RAIM exemption requirements prompted changes to the RAIM PC charge code.
  - The effective Trade Date for the change to Forecasting Service Fee charge code is 12/1/2022 and the anticipated implementation date is 10/26/2022.
  - The retroactive effective Trade Date for the change to RAIM PC charge code is 12/15/2021 and the implementation date was 5/25/2022
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# PRR 1455: Update configuration guide documentation only to reflect Central Procurement Entity initiative settlement

- Reason for revision
  - Starting RA Assessment Year 2023, the CPUC allows Central Procurement Entity (CPE) to procure on behalf of Load Serving Entities in their LRA jurisdiction. A CPE will share – on behalf of the LSE it represents - any CPM cost allocation obligation.
  - The Settlement configuration guide documents the changes describing settlement of Central Procurement Entity (CPE) in support of the CPE project.
  - The changes are to be deployed around 10/26/2022. The effective date will be Trade Date 1/1/2023.
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision



# PRR 1456: Update BPM for CC 4515 to correct input description for bid segment attribute value for self-schedules to match as configured

- Reason for revision
  - Internal CAISO research found that input description for bid segment attribute value for self-schedules is incorrect. The actual value configured under CC 4515 for energy self-schedules and AS self-provision is not “0”, instead the value is another number which is not equal to “0”. This deviation in attribute value has no financial impact on actual counting of bids since counting of bids subject to fee is based on interval value quantity instead of attribute value.
  - In order to match the as-configured/implemented attribute value, the input descriptions:
    - “The bid segment number for Self Schedule Qty will be set to “0”” and
    - “The bid segment number for Self Provision Qty will be set to “0””
  - will be deleted from the BPMs under consideration. This avoids confusion with actual implemented attribute value which is not “0”.
  - Configuration guide versions as listed above were updated to correct the input descriptions.
  - The effective date will be Trade Date 11/1/2016.
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# PRR 1457: Update configuration guides for Real-Time Ancillary Services Imports Congestion to resolve quantity issue for retroactive trade dates

- Reason for revision
  - A conversion error of MW to MWh on the input quantity used for the assessment of Real-Time AS imports congestion was found last year and fixed for 11/1/2021 going forward. The subject current fix is to do similar correction for trade dates 1/1/2020-10/31/2021.
  - As far as impacted charge codes, CC 6755 and 6765 will reflect settlement changes. The successor charge code CC 6774 (Real-Time Congestion Offset) allocated to Measured Demand can reflect settlement value changes as well.
  - There is also a document only changes for versions 5.2.5 to delete reference to BD matrix file, which was replaced a long time ago with config output file associating BPM variable names with system bill determinant names.
  - The retroactive fix changes are to be deployed around 10/26/2022 and will impact retroactively settled charge codes for Trade Dates 1/1/2020-10/31/2021.
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

**PRR 1458:** Updated charge codes 64600 and 64700 real-time dispatch and fifteen minute market instructed imbalance energy, energy imbalance market to accurately account for energy transfer system resources in the current price and current quantity of each charge code

- Reason for revision
  - An EIM Entity submitted an inquiry ticket requested regarding ETSR resources not being included in the Current Quantity and Current Price bill determinants of both FMM and RTD IIE Charge Codes. Although this does not have any financial implications since the Amounts are calculated correctly, this is a valid concern and affects the accuracy of relevant data for analysis.
  - To fix this issue, we updated equations in both charge codes to include ETSR resources in both bill determinants.
  - The effective date of the changes is 12/1/2022
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# PRR 1459: Update configuration guide documentation only to reflect reliability demand response resource bidding enhancements phase 2 initiative settlement

- Reason for revision
  - To promote feasible dispatches, ISO can adjust a Discrete RDRR (Reliability Demand Response Resource) real-time minimum load cost to be nonzero. This is a feature included with the RDRR Bidding Enhancements Phase 2 initiative.
  - While Discrete RDRR resources are not allowed to bid nonzero minimum load cost, CAISO will reflect nonzero (positive) cost in the market to promote feasible dispatches. This adjustment, if any, will be reflected in the minimum load cost used in the bid cost recovery settlement.
  - The changes are to be deployed around 10/26/2022. The effective date will be Trade Date 1/1/2023.
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

## PRR 1460: Implemented changes to the flexible ramp product charge codes in accordance with the flexible ramping product deliverability initiative

- Reason for revision

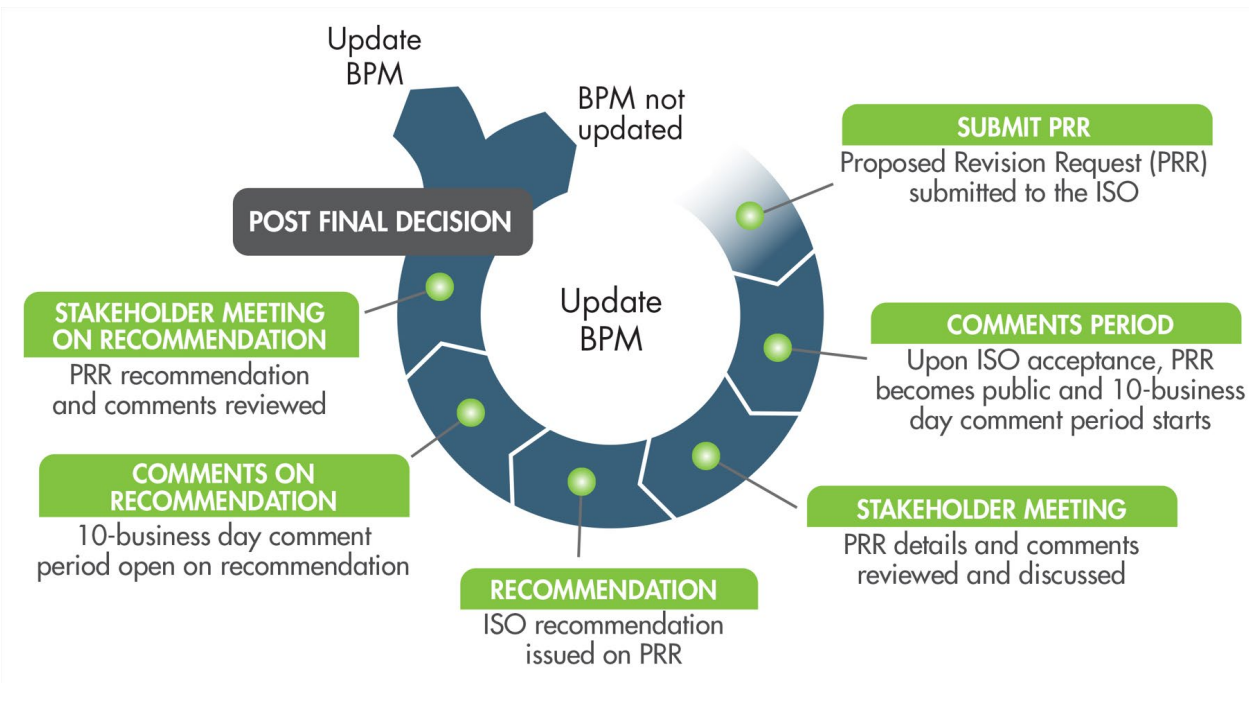
The Flexible Ramping product (FRP) is designed to ensure that there is sufficient ramping capability available in the financially binding five-minute interval to meet the forecasted net load for interval  $t+5$  and cover upwards and downwards forecast error uncertainty.

- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

PRR 1461: Settlement configuration changes to unaccounted for energy charge code 64740 to support western energy imbalance market enhancements to ensure correct settlement of generation only balancing authority area western energy imbalance market entities.

- Reason for revision
  - The configuration changes are needed to support settlement of WEIM Gen-Only BAAs. In the absence of metered demand, this update will allow settlements to allocate to an entity by using a new Gen-Only BAA Flag.
  - The effective Trade Date for this change is 12/1/2022 and the anticipated implementation date is 10/26/2022
- Recommendation Comments: None
- Recommendation comment period expired: October 18, 2022
- Next step: Post Final Decision

# Next BPM PRR Review Monthly Meeting: November 29, 2022 @ 11 a.m.



BPM change management  
process questions:

Nicole Hines

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