



# BPM Change Management Meeting

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- Please keep comments professional and respectful.

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# Agenda – BPM Change Management Meeting September 27, 2022

Topic	Presenter
Introduction / Meeting Overview	Christina Costa
<b>Discussion of active proposed changes:</b> Demand Response Generator Interconnection and Deliverability Allocation Procedures Market Operations Reliability Requirements Generator Management Settlements and Billing	Elaine Siegel Daune Wilson Michael Martin Melanie Bogen Jill Jordan Massih Ahmadi
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

PRR	PRR Title	Stage
1465	2.1 Product Overview & Generation Data Template (GRDT) Submission and Processing Appendix H	Initial

# PRR 1465: 2.1 Product Overview & 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
- Initial Comments: Southern California Edison
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# Generator Interconnection and Deliverability Allocation Procedures

PRR	PRR Title	Stage
1450	Portion of 2021 interconnection process enhancements initiative phase one changes	Recommendation
1464	Remainder of 2021 interconnection process enhancements initiative phase one changes	Initial



# PRR 1450: Portion of 2021 interconnection process enhancements initiative phase one changes

- Reason for revision
  - Incorporate some anticipated tariff changes resulting from the 2021 Interconnection Process Enhancement initiative Phase I changes.
- Recommendation Comments: None
- Recommendation comment period expired: September 14, 2022
- Next step: Post 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.
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# Market Operations

PRR	PRR Title	Stage
1462	Change to loss sensitivity calculation	Initial
1463	Clarification on reference buses used in the market power mitigation	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.
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# 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.
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# Reliability Requirements

PRR	PRR Title	Stage
1451	Clarification for price taking exports	Initial

# 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.
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# Generator Management

PRR	PRR Title	Stage
1449	2021 Interconnection process enhancements phase one implementation	Recommendation



# PRR 1449: 2021 Interconnection process enhancements phase one implementation

- Reason for revision
  - Changes for 2021 Interconnection Process Enhancements (IPE) Phase 1 Implementation, and an edit to Footnote 21 regarding Partial Capacity Deliverability Status (PCDS) for hybrid/co-located resources (not related to 2021 IPE).
- Recommendation Comments: None
- Recommendation comment period expired: September 14, 2022
- Next step: Post Final Decision

# Settlements and Billing BPM

PRR	PRR Title	Stage
1452	RUC No Pay Quantity Pre-Calculation	Initial
1453	Updated BPM Configuration guide for CC 8831 Monthly Resource Adequacy Availability Incentive Mechanism Allocation to accommodate documentation updates	Initial
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	Initial

# Settlements and Billing BPM

PRR	PRR Title	Stage
1455	Update configuration guide documentation only to reflect Central Procurement Entity initiative settlement	Initial
1456	Update BPM for CC 4515 to correct input description for bid segment attribute value for self-schedules to match as configured	Initial
1457	Update configuration guides for Real-Time Ancillary Services Imports Congestion to resolve quantity issue for retroactive trade dates	Initial
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	Initial

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

# 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
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# 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
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# 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
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# 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.
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation



# 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.
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# 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.
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

**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
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# 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.
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

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

- Reason for revision

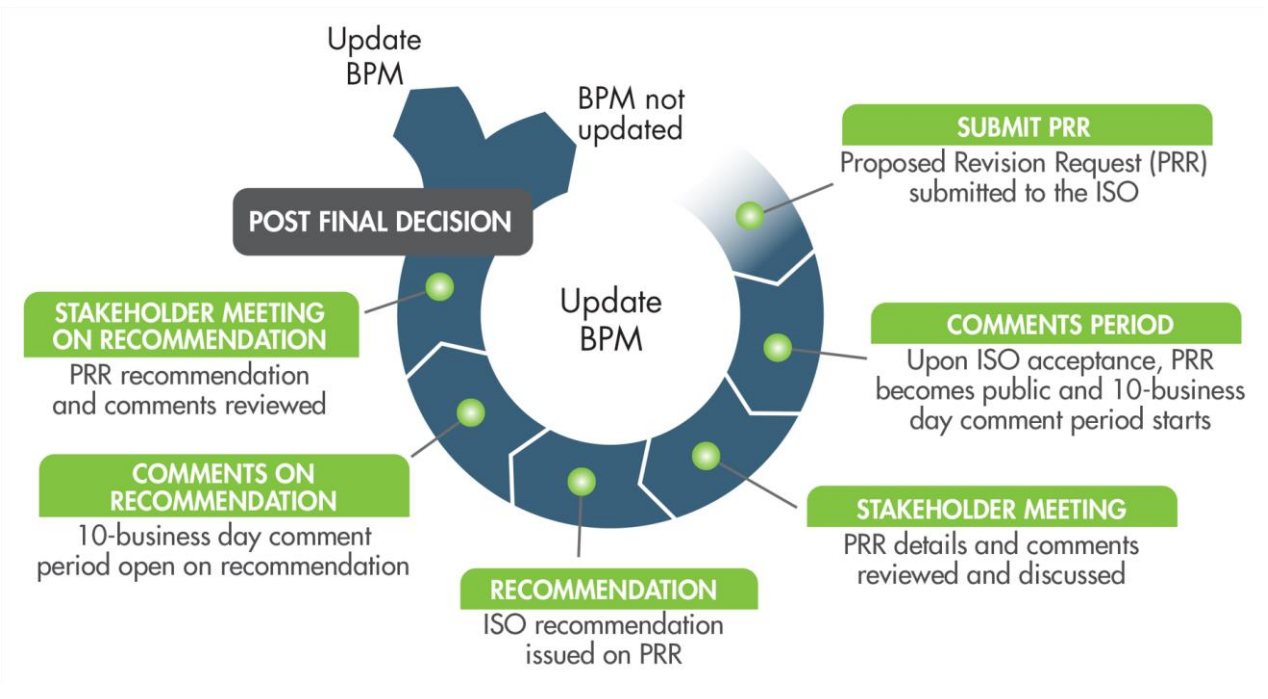
The Flexible Ramping product (FRP) is designed to ensure that there is sufficient ramping capability available in the financially binding five-minute interval to meet the forecasted net load for interval  $t+5$  and cover upwards and downwards forecast error uncertainty.

- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

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
- Initial Comments: None
- Initial comment period expired: September 14, 2022
- Next step: Post Recommendation

# Next BPM PRR Review Monthly Meeting: October 25, 2022 @ 11 a.m.



BPM change management  
process questions:  
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