

Customer Interface for Resource Adequacy (CIRA) Enhancements

February 18, 2021

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Agenda

In this training, you will learn:

- How to upload flexible capacity survey files
- Where to view RA plan reports
- Where to view acquired resources
- Where to view third-party SC contact info
- How LSE IDs will be sourced from Master File
- Which reports are being relocated to OASIS





Definitions

Abbreviation/Term	Definition
AIM	Access and Identity Management
CIDI	Customer Inquiry Dispute & Information
CIRA	Customer Interface for Resource Adequacy
CPM	Capacity Procurement Mechanism
EIM	Energy Imbalance Market
FNM	Full Network Model
LRA	Local Regulatory Authority
LSE	Load Serving Entity
NQC	Net Qualifying Capacity
OASIS	Open Access Same-time Information System
RA	Resource Adequacy
SC	Scheduling Coordinator
UAA	User Access Administrator



Implementation Timeline

- Tune in to the following meetings for updates on the deployment to Market Sim and Production environments:
 - February 22, 2021: Reliability Requirements
 Customer Partnership Group
 - February 23, 2021: Release User Group



Readiness Activities

- The ISO will make sure that users are ready (have been provisioned to the appropriate LSE IDs) in time for implementation
- Prior to changes going into effect, make best effort to resolve any outstanding cross validation errors for April compliance month
- Ensure LSE RA plan, Admin Info tab reflects new LSE ID for May compliance month
- Ensure corresponding suppliers that have been contracted with have updated their supply plans to reflect the newly created LSE ID on the RA Capacity tab (Column I)





CIRA ENHANCEMENTS



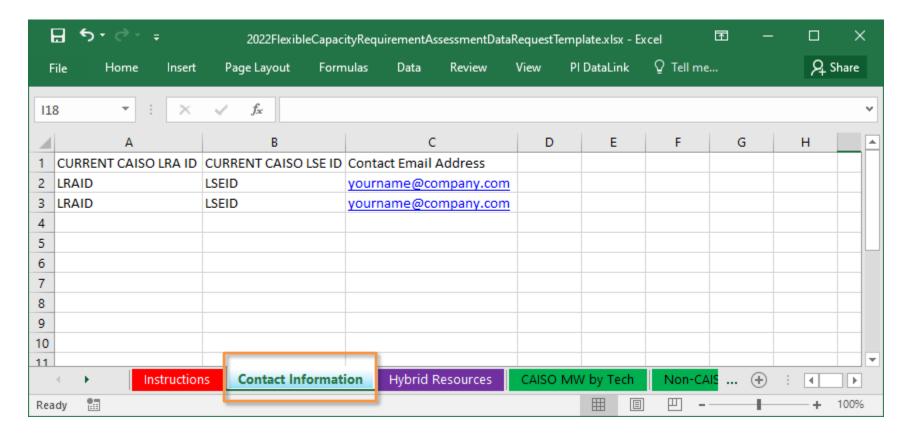
Process Change: Flexible Capacity Needs Assessment

- SCs of LSEs submit flexible capacity survey files to the ISO as part of the flexible capacity needs assessment process
- The ISO determines the quantity of flexible capacity needed for the upcoming resource adequacy year and how this quantity is allocated to local regulatory authorities (LRAs)
- Previously, these survey files were submitted using the Customer Inquiry Dispute & Information (CIDI) application
- This activity will now take place within CIRA



Flexible Capacity Requirement Assessment Data Request Template (called survey files in CIRA)

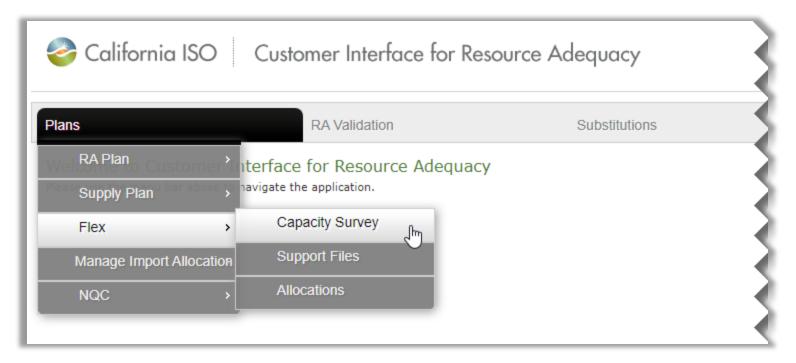
 Contact Information Tab - ensure that the LRA ID and LSE ID fields are not blank





Flexible Capacity Survey Files

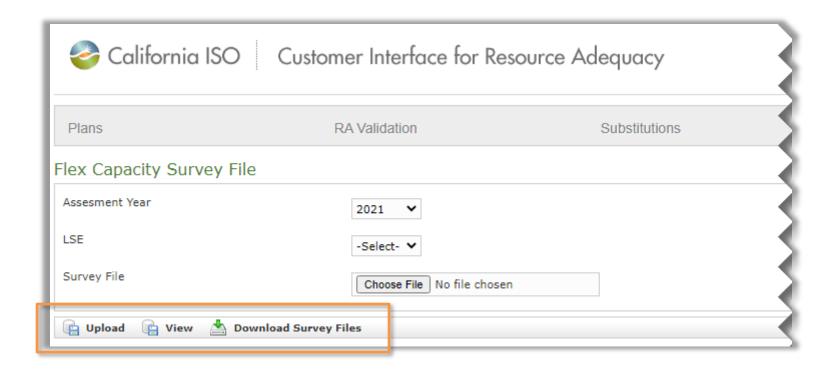
- Upload your flexible capacity survey file into CIRA using the following navigation path:
 - Plans > Flex > Capacity Survey





Flexible Capacity Survey Files

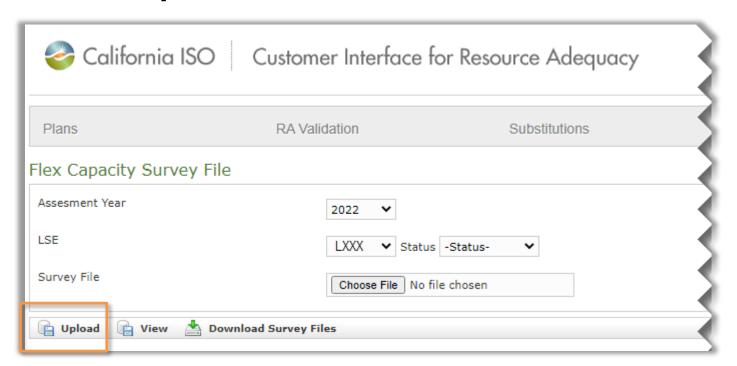
 This screen gives you the option to upload, view, or download the survey files





Steps to Upload Flexible Capacity Survey Files

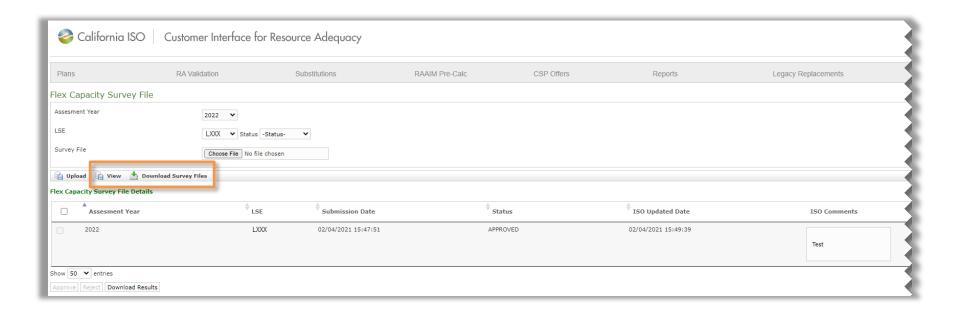
- Choose the appropriate LSE ID from the drop-down menu
- Click the Choose File button to browse for your file
- Click the **Upload** button





Flexible Capacity Survey File (View/Download)

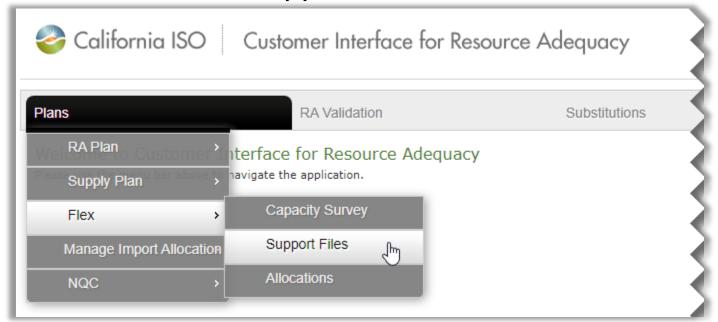
- Click the View button to see information about the survey file (e.g. assessment year, LSE, status)
- Click the **Download Survey Files** button to download the file that was submitted for the selected LSE ID





Flexible RA Obligation Support Files

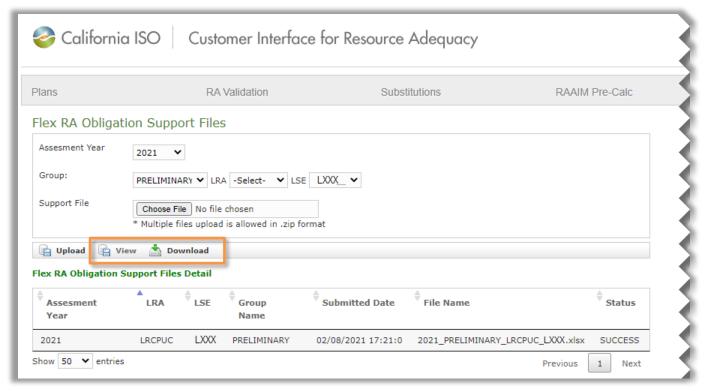
- Support files provided by the ISO contain a preview of the RA obligation allocation, including background data and calculations
- Download your flexible RA obligation support files from CIRA using the following navigation path:
 - Plans > Flex > Support Files





Flexible RA Obligation Support Files (View/Download)

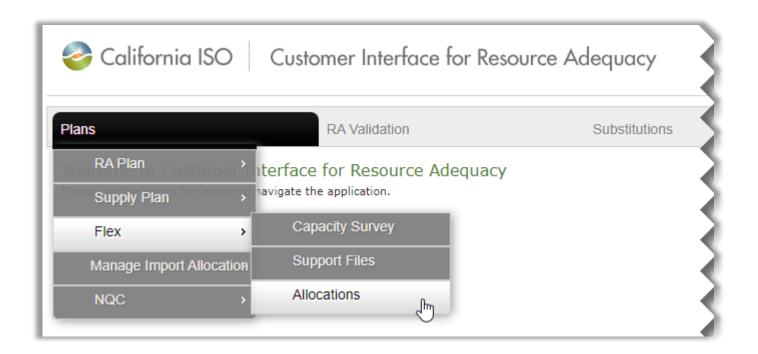
- Click the View button to see information about the support file (e.g. assessment year, LSE, status)
- Click the **Download** button to download the support file for the selected LSE ID





Flexible RA Obligation Allocation

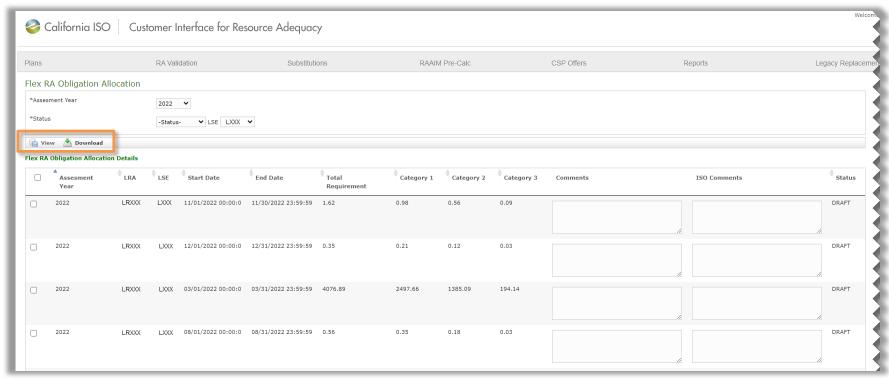
- View your flexible RA obligation allocation at the following navigation path:
 - Plans > Flex > Allocations





Flexible RA Obligation Allocation (View/Download)

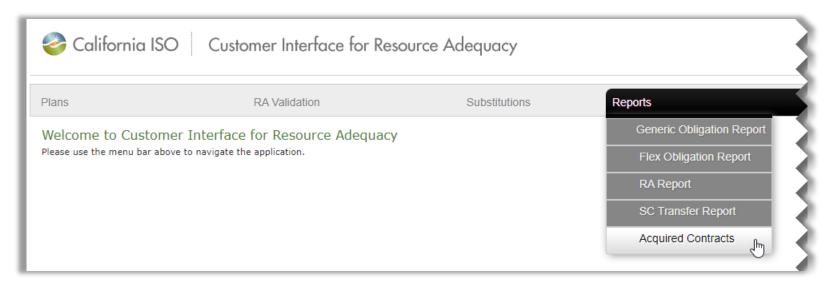
- Click the View button to see the flexible RA obligation allocation for the selected LSE ID
- Click the **Download** button to download the report in Excel format





Acquired Contracts Report (new report)

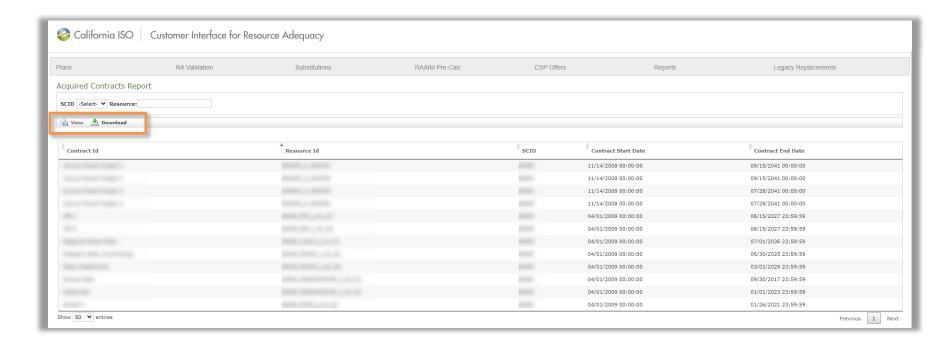
- Acquired contracts pre-date the RA program and have exemptions to some RA provisions
- These resources can be used to meet your RA obligation
- SCs can view the acquired contracts associated with their SCIDs at the following navigation path:
 - Reports > Acquired Contracts





Acquired Contracts Report (View/Download)

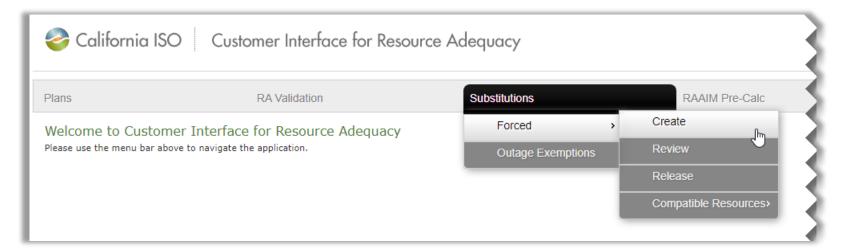
- Click the View button to see the acquired contracts associated with the selected SCID
- Click the **Download** button to download the report in Excel format





Contact info for third-party SCs now available when creating forced outage substitutions

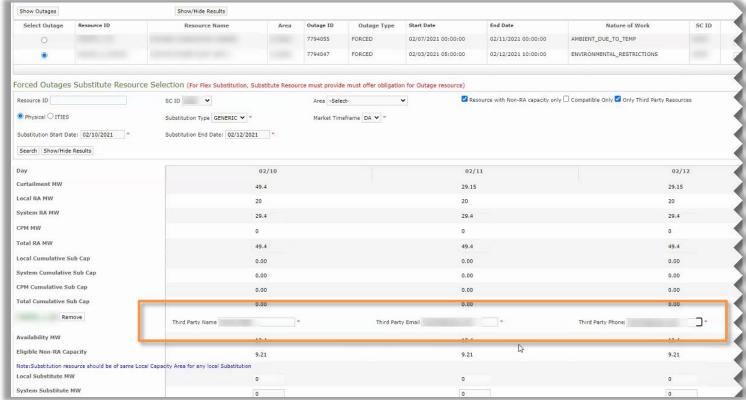
- When an RA resource has a forced outage, consistent with section 9.3.3 of the Reliability Requirements BPM, a substitution may be required for the RA impacted portion
- Forced outage substitutions are created at the following navigation path:
 - Substitutions > Forced > Create





Contact info for third-party SCs now available when creating forced outage substitutions

 When creating third-party substitutions, the name, email, and phone number of the SC will be populated using data provided from the Admin Info tab in the supply plan





LSE IDs will be sourced from Master File

- CIRA will begin to source its list of LSE IDs from Master File
- This update requires changes to access provisioning to prevent the loss of access to upload resource adequacy (RA) plans in CIRA
- UAAs should provision your LSE ID (NOT SCID or LRA ID) for one of the following roles:
 - EXTERNAL RA READ-ONLY
 - EXTERNAL RA READ-WRITE
- The ISO will:
 - Contact and assist UAAs in impacted organizations to reprovision users to the new LSE IDs
 - Assist in validating that organizations have been reprovisioned prior to go-live to prevent loss of access to data within CIRA



Questions?





Net Qualifying Capacities

CPM Designations

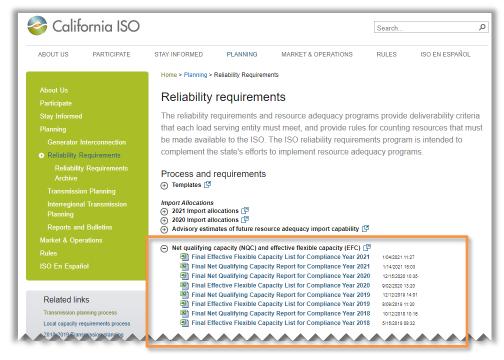
Full Network Model Mapping Data

OASIS REPORTS



Net Qualifying Capacities Report (current location)

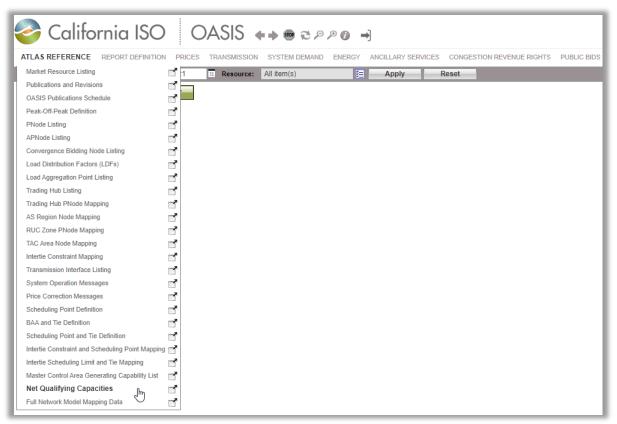
- The ISO provides reports on a resource's net qualifying capacity (the amount of RA capacity that an RA resource may be eligible to provide)
- Today, this report is posted to the Reliability Requirements webpage





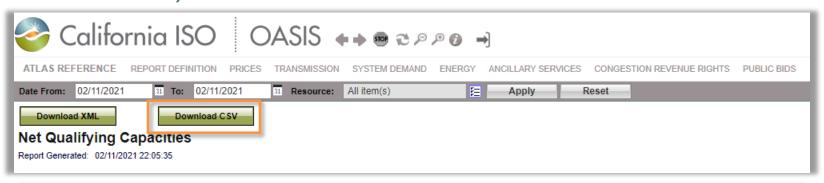
Net Qualifying Capacities Report (moving to OASIS)

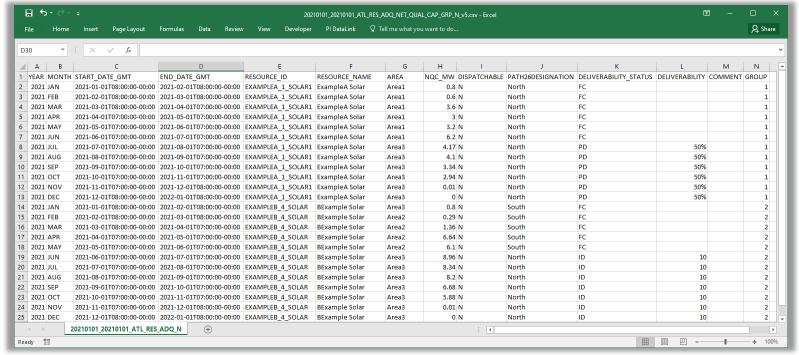
- The Net Qualifying Capacities report will now be posted to OASIS at the following navigation path:
 - Atlas Reference > Net Qualifying Capacities





Net Qualifying Capacities Report (sample download from OASIS)





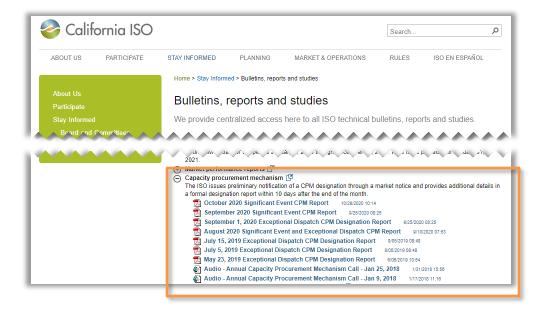


CPM Designations Report (current location)

- The ISO procures backstop RA capacity as part of the capacity procurement mechanism (CPM) process
- Part of the process includes posting a report with details of the CPM

Today, this report is posted to the Bulletins, Reports and

Studies webpage





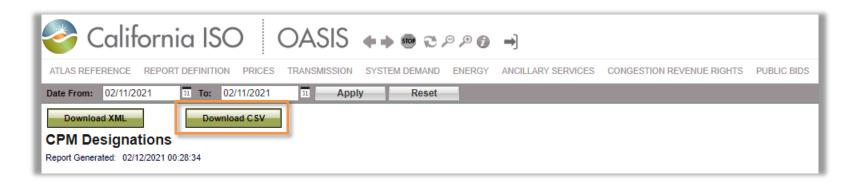
CPM Designations Report (moving to OASIS)

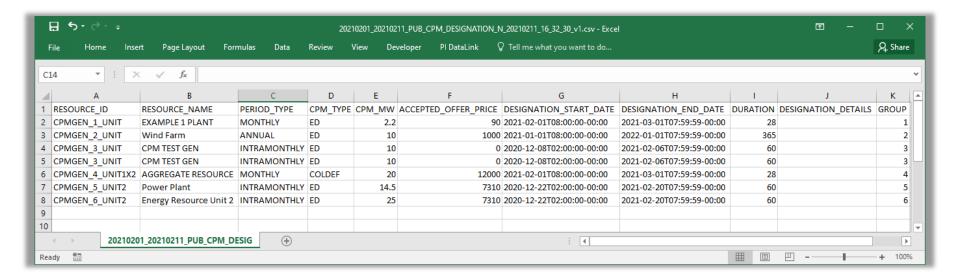
- The CPM Designations report will now be posted to OASIS at the following navigation path:
 - Public Bids > CPM Designations
- These reports are published when a CPM occurs
 - The report may show up in both places before we cut over to OASIS only





CPM Designations Report (sample download from OASIS)







Full Network Model Mapping Data (current location)

- The ISO's full network model defines system parameters, price node and market scheduling limit mappings, and planned network model updates
- Today, the full network model mapping data is posted to the Network and Resource Modeling webpage

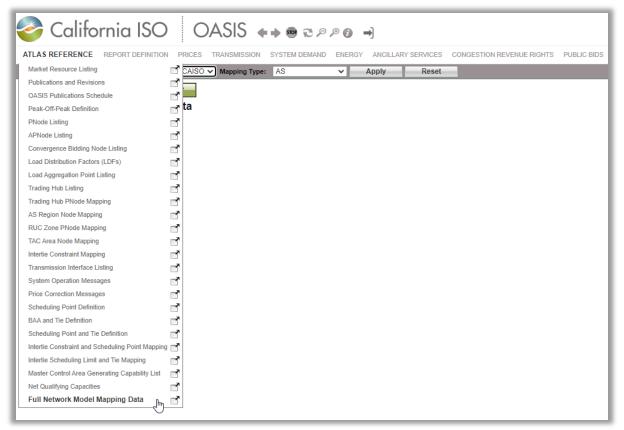
Note: This OASIS change is unrelated to CIRA Enhancements





Full Network Model Mapping Data (moving to OASIS)

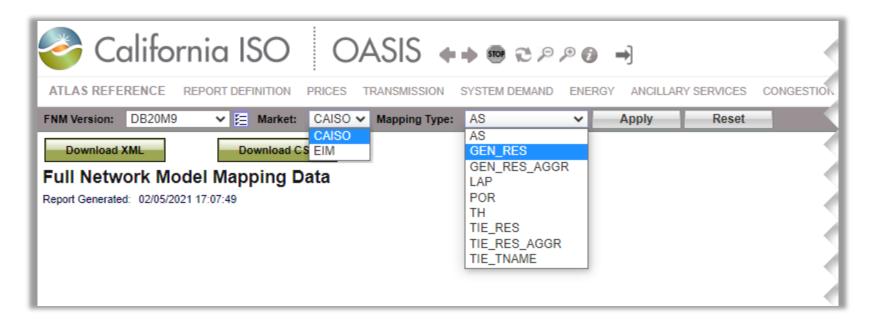
- The Full Network Model Mapping Data will now be posted to OASIS at the following navigation path:
 - Atlas Reference > Full Network Model Mapping Data





Full Network Model Mapping Data (Choose report parameters)

- Select the FNM Version
- Choose the Market (CAISO or EIM)
- Choose the Mapping Type





Full Network Model Mapping Data – Sample Report Mockup*

The data provided on each report will vary based on the Mapping Type selected. For example:

GEN_RES

RES	TYPE	UDC ID	RES ID	RES NAME	PNODE	BUS ID	FNM VERSION	RELEASE DATE	GROUP

LAP

UDC ID	LAP ID	RES TYPE	LAP APNODE ID	RES ID	CNODE ID	BUS ID	LDF ON PEAK	LDF OFF PEAK	FNM VERSION	RELEASE DATE	GROUP



^{*(}Sample field names adjusted for readability.)

Questions?



Evaluation Survey

- Please take a moment to complete the training survey
- Link is provided in the chat pod







Thank you for your participation!

For more detailed information on anything presented, please visit our website at:

www.caiso.com

Or send an email to: CustomerReadiness@caiso.com



REFERENCE MATERIAL



Reference Material

- 2022 Flexible Capacity Requirement Assessment Data Request Template:
 - http://www.caiso.com/Documents/2022FlexibleCapacityRequirementAssessment
 DataRequestTemplate.xlsx
- ISO Developer Site (for technical specs)
 - https://developer.caiso.com/
- Provisioning Access to CIRA (training slides)
 - http://www.caiso.com/Documents/Presentation-Customer-Interface-Resource-Adequacy-Provisioning.pdf
- Provisioning Access to CIRA (recorded presentation)
 - https://youtu.be/8vRoPT6OALg
- Reliability Requirements/Resource Adequacy page
 - http://www.caiso.com/planning/Pages/ReliabilityRequirements/Default.aspx

