



# Market Simulation Call - Independent 2020 Release

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# Recordings

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# Agenda

- MAP Stage & Stage Availability
- Independent 2020 Releases Market Simulation Initiatives & Timelines
- Market Simulation Initiatives
- OMS Enhancements
- ADS Phase 3: Activation of New Features
- Next Steps

# MAP Stage Availability

- Refer to MAP Stage portal <https://portalmap.caiso.com> for system availability information
- Current MAP Stage Maintenance
  - 10/30-11/2: CMRI UI/API unavailable
- Upcoming MAP Stage Maintenance
  - 11/4: OMS UI/API brief interruption
- MAP Stage Weekly Maintenance Window
  - Friday

# Independent 2020 Releases Market Simulation Initiatives & Timelines

<b>Independent 2020 Release Initiatives</b>	<b>Start Date</b>	<b>End Date</b>	<b>Structured Simulation Start (Trade Date)</b>
<b>Independent 2020 Release Market Simulation</b>			
FRP Improvements - Buffer and Min	10/13/20	10/28/20	10/14/20 (Complete)
Energy Imbalance Market (EIM) Enhancements 2020 - CMRI	11/16/20	11/30/20	N/A
Hybrid Resources - Phase 1	10/26/20	11/13/20	N/A
Commitment Costs and Default Energy Bid Enhancements Phase 1	7/27/20 11/10/20	11/24/20	N/A
Nodal Pricing Model	10/6/20	11/13/20	10/20/20 -10/22/20 (Complete)
Intertie Deviation Settlement	12/1/20	12/18/20	<b>12/1/20</b>
Symmetrical Wheeling	11/12/20	11/30/20	
Settlements Q4/Winter Release	10/6/20	11/13/20	

## Market Simulation Settlements Calendar:

<http://www.caiso.com/Documents/MarketSimulationSettlementsCalendar-IndependentWinter2020Release.pdf>

# Market Simulation Initiatives

- **Intertie Deviation Settlement**

- **Timeline:** December 1 - December 18
- **Structured :** December 1
- Please use <https://demo.caiso.tag.oati.com/> to submit tags in MapStage environment
- Structured Scenarios document -  
<http://www.caiso.com/Documents/MarketSimulationScenariosIntertieDeviationSettlement.pdf>

- **Symmetrical Wheeling**

- **Timeline:** November 12 – November 30
- Business Requirements Specification -  
[http://www.caiso.com/Documents/BusinessRequirementsSpecification\\_SymmetricalSettlementForWheelingThroughEimBAAs.pdf](http://www.caiso.com/Documents/BusinessRequirementsSpecification_SymmetricalSettlementForWheelingThroughEimBAAs.pdf)
- Unstructured Scenarios document -  
<http://www.caiso.com/Documents/MarketSimulationScenariosSymmetricalSettlementForWheelingThroughEimBAAs.pdf>

# Market Simulation Initiatives

- Hybrid Resources - Phase 1
  - **Timeline:** October 26 – November 13
  - Business Requirements Specification - <http://www.aiso.com/Documents/BusinessRequirementsSpecification-HybridResourcesPhase1.pdf>
- Commitment Costs and Default Energy Bid Enhancements
  - **Timeline:** July 27 – November 24; November 10 - November for new SIBR rules
  - Training
    - <http://www.aiso.com/Documents/Presentation-CommitmentCosts-DefaultEnergyBidEnhancements.pdf>
  - SIBR business rules, release notes published 10/27
    - <http://www.aiso.com/Documents/SIBRBusinessRulesforBiddingv11042Post.xlsx>
    - <http://www.aiso.com/Documents/SIBRReleaseNotesRulesFall2020.pdf>

# Market Simulation Initiatives

- Nodal Pricing Model

- **Timeline:** October 6 – November 13
- **Structured:** October 20 - October 22
- Structured Scenarios document - [http://www.caiso.com/Documents/NPM\\_structured\\_mktsim-Reviewed.pdf](http://www.caiso.com/Documents/NPM_structured_mktsim-Reviewed.pdf)

Project Info	Details/Date
Reference	<p>Reference – ISO market notice from Dec 18, 2019 – see: Stay Informed\Meetings and Events\Miscellaneous stakeholder meetings\Previous Meetings\2019 meetings\PacifiCorp nodal pricing model service informational call - Dec 18,2019 or <a href="http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=E8304346-54B9-4473-9E45-9C282AAD1340">http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=E8304346-54B9-4473-9E45-9C282AAD1340</a></p> <p>Reference - NPM FERC filing <a href="http://www.caiso.com/Documents/Dec20-2019_NodalPricingModelAgmt_CAISO-PacifiCorp_ER20-664.pdf#search=NPM">http://www.caiso.com/Documents/Dec20-2019_NodalPricingModelAgmt_CAISO-PacifiCorp_ER20-664.pdf#search=NPM</a></p>
Excerpt from the market notice:	<p>“The California ISO is hosting an informational stakeholder call on Dec. 18, 2019, to discuss an agreement that it intends to file with Federal Energy Regulatory Commission (FERC) that will provide PacifiCorp with an advisory nodal pricing model (NPM) service. Information related to this effort available on the ISO website at <a href="http://www.caiso.com/informed/Pages/MeetingsEvents/MiscellaneousStakeholderMeetings/Default.aspx">http://www.caiso.com/informed/Pages/MeetingsEvents/MiscellaneousStakeholderMeetings/Default.aspx</a>.</p> <p>This service will produce separate advisory day-ahead nodal pricing results for locations within PacifiCorp's balancing authority areas, without a financial settlement or impact to the ISO's day-ahead market. PacifiCorp will pay the ISO's estimated cost to provide the service. PacifiCorp plans to use the NPM solution results as the basis for its power cost allocation among the states within which it provides retail electric service, consistent with the recently filed inter-jurisdictional cost allocation agreement.”</p>

Milestone Type	Milestone Name	Dates	Status
Tariff	FERC Approval	Feb 28, 2020	✓
Config Guides	Publish Config Guide	Aug 10, 2020	✓
Market Sim	Market Sim Window	Oct 06, 2020 - Nov 13, 2020	
Production Activation	Day Ahead Nodal Pricing Model	Jan 15, 2021	



# Market Simulation Initiatives

- **FRP Improvement Buffer and Min**
  - **Timeline:** October 13 – October 28
  - Structured Scenarios document - <http://www.caiso.com/Documents/MarketSimulationScenarios-FRPImprovementsBufferandMin.pdf>
- **Energy Imbalance Market (EIM) Enhancements 2020**
  - **Timeline:** November 16 – November 30 (CMRI)
  - BAAOP & BSAP currently available in MAP-Stage
  - Unstructured Scenarios document <http://www.caiso.com/Documents/MarketSimulationScenariosEnergyImbalanceMarket2020Enhancements.pdf>

# Settlements Q4/Winter Release

## Release Scope:

- Day Ahead Nodal (NPM project)
- Intertie Deviation Settlement (IDS)
- EIM Enhancement: Symmetrical Wheeling
- Production defects as noted in release component SUG email

## Release Milestones as follows:

- 1st draft technical documentation posted = **8/10**
- 1st draft configuration output file + initial release component summary posted = **8/25**
- 2nd draft configuration output file + 2nd draft tech docs + updated release component summary posted = **9/14**
- 3rd draft configuration output file (pre market sim) posted = **10/8**
- Unplanned draft configuration output file posted - **10/29**
  - IDS calc granularity change from MW to MWh
- Deployed to MAP-Stage = **10/6**

## Winter 2020 settlements release draft settlements technical documentation:

<http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=EF90CE68-D8D0-43F7-8052-04FBE1D0825B>

# OMS Roadmap for 2020

Release	Major Changes	Participant	MAPStage	Production
October	<p>Remove defaulting discovery date</p> <ul style="list-style-type: none"> <li>- For retro-active outages submit discovery date.</li> <li>- Handle no discovery date if not previously submitted.</li> </ul>	All	11/04/2020	12/21/2020
	<p>Aggregate Resource Outage retrieve results changes</p> <ul style="list-style-type: none"> <li>- Handle receiving only parent and impacted children.</li> </ul>	All		
	<p>Transmission Retrieve Changes</p> <ul style="list-style-type: none"> <li>- If moving to new version (= 10012020), consume new XSD and handle receipt of multiple change requests.</li> </ul>	All		
	<p>Retrieve Resource/Transmission outage change request</p> <ul style="list-style-type: none"> <li>- Limiting to 50</li> <li>- Disable querying with participant ID &amp; Date Range.</li> <li>- Query by Outage ID, Change request ID and Equipment ID/Resource ID</li> </ul>	All		

# 2020 - System Interface Changes - OMS

OMS					
Project	Service	Summary	Tech Spec	MAP Stage	Production
N/A	RetrieveResourceOutageChangeRequest_OMSv2_AP & DocAttach RetrieveResourceOutageChangeRequest_OMSv2_DocAttach_AP RetrieveResourceOutageChangeRequest_OMSv3_AP RetrieveResourceOutageChangeRequest_OMSv3_DocAttach_AP RetrieveTransmissionOutageChangeRequest_OMSv2_AP RetrieveTransmissionOutageChangeRequest_OMSv2_DocAttach_AP RetrieveTransmissionOutageChangeRequest_OMSv3_AP RetrieveTransmissionOutageChangeRequest_OMSv3_DocAttach_AP	<ul style="list-style-type: none"> <li>Performance Improvements:                             <ul style="list-style-type: none"> <li>Retrieve up to 50 outages by querying on outage ID)</li> <li>Retrieve based on Change Request ID</li> <li>Retrieve based on Equipment ID</li> <li>Removed capability of querying by participant ID</li> <li>Recommended use to sync data</li> </ul> </li> </ul>	✓ 8/11/20, v2.1	11/4/2020	12/21/2020
N/A		<ul style="list-style-type: none"> <li>WebOMS system will not default the discovery date</li> </ul>	✓ 8/11/20, v2.1	11/4/2020	12/21/2020
N/A	SubmitResourceOutage_OMSv2_AP SubmitResourceOutage_OMSv2_DocAttach_AP SubmitResourceOutage_OMSv3_AP SubmitResourceOutage_OMSv3_DocAttach_AP	<ul style="list-style-type: none"> <li>Changes to aggregate resource outage submission for performance improvement                             <ul style="list-style-type: none"> <li>Submit de-rate for parent resource (required) and only the impacted child resources</li> <li>Retrieve results will not be include (for both v2 and v3 services) child resources that have no curtailment</li> <li>Parent resource availability points need not match with child resources' but will remain within the overall outage start and end date span</li> <li>Child resource outages can be added to existing outage if the outage has not commenced</li> <li>UI display and retrieve results for historical outages will be modified to support this model</li> <li>Changes are being done to enhance webOMS performance</li> </ul> </li> </ul>	✓ 8/11/20, v2.1	11/4/2020	12/21/2020

<https://developer.caiso.com>

# ADS Phase 3: Activation of New Features

- ✓ 10/20: ADS Phase 1: Network
- ✓ 10/20: ADS Phase 2: New ADS UI, API v8 available
- **10/30: Close Stage, End Parallel Operations**
  - MAP-Stage remains available with active features from now on
- **12/16: Activation of New Features**
  - Only available on New ADS UI, API v8
    - DOTT
    - Unannounced AS Test
    - RTCD Commitment
    - Follow DOT Flag
    - Operating Instructions
- 2/1/21: ADS Phase 4: Decommission of Old ADS client, API v6

# ADS Phase 3: Activation of New Features

## ➤ 12/16: Activation of New Features

- Only available on New ADS UI, API v8
- ISO invites customers to leverage ISO Assisted Customer Cutover lines
  - To transition to new ADS UI, API v8
  - To report transition plans, progress, issues
  - By phone: call 1-866-528-2256, access code: 1465216
  - Dates: 11/4, 11/11, 11/18, skip 11/26 due to holiday, 12/2, 12/9 and 12/16
  - Time: 1300-1400 PT
- Recommendation
  - Run ADS Client and new ADS UI in parallel for validation
  - Cutover to API v8 now, as it provides same functionality as v7

# Next Steps

- The next teleconference is scheduled on Thursday, November 5<sup>th</sup> at 1400 PDT

# Reference Slides



# Independent 2020 Releases Communication Plan

- **Schedule**

<b><i>Monday</i></b> Sep 28, Oct 5,12,19, 26 Nov 2, 9, 16, 23, 30	<b><i>Thursday</i></b> Oct 1,8,15, 22, 29 Nov 5, 12, 19
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- **Connection Information**

- **Web Conference Information**

- Web Address: <https://caiso.webex.com/meet/MarketSim>
    - Meeting Number: 962 067 710
    - Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter the phone number you will use during the call. You will be called by the conference shortly.

- **Conference Call Information**

- Dial-in Number: 866-528-2256
    - International Dial-in: 216-706-7052
    - Access Code: 202 249 0

# Independent 2020 Releases Structured Scenario Registration Details

MP's will need to register their request with the ISO to participate in this simulation via the [MarketSim@caiso.com](mailto:MarketSim@caiso.com) mailbox.

Date of registration October 9, 2020.

We will do our best to accommodate for late registration

# Market Simulation Issue Management

- Submit all issues to the CIDI case management system
- CIDI tickets must have “**Functional Environment**” = “**Market Simulation Independent 2020**” to be reviewed by ISO SMEs

# ISO Market Simulation Support

- **Hours:** Monday thru Friday 0900-1800 PDT
- **ISO's 24x7 Service Desk:** (916) 351-2309 (Connectivity – UI or API)
  - Issues called in after hours will be worked on during the next business day
- **Email:** [MarketSim@caiso.com](mailto:MarketSim@caiso.com)

# Known Issues - ADS

#	System	Summary	Status	Estimated Fix Date
1	ADS	Support to share/port over the profiles across environment	Will help manually porting over one profile per user upon request. Please submit CIDI ticket with the details ( Profile Name, User ID & Environment To & From)	N/A