Resource Interconnection Management System (RIMS) Enhancements Training

January 12, 2022

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Customer Readiness

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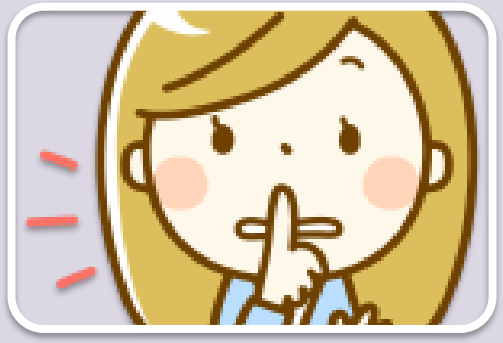
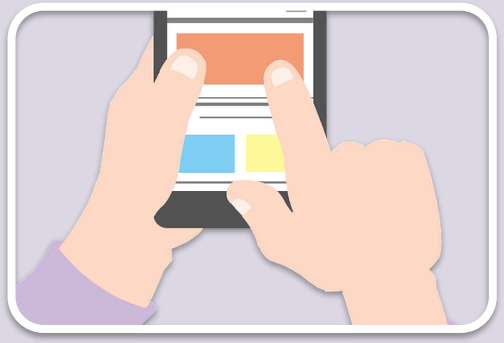
Housekeeping



Keep yourself muted to minimize background noise



Unmute to ask verbal questions or write questions in the chat pod

Raise your hand using WebEx interactivity tools

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Objective: RIMS Enhancements

- Changes being made to RIMS are to align the documentation due dates with the Full Network Model build cycle
- Goal is to ensure that firm deadlines are understood and met in order to facilitate a smooth implementation process
- Changes will be implemented the week of January 24, 2022
  - Go-live date will be provided via notice posted to caiso.com and Customer Service Notice email to RIMS users

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Agenda

- This training will cover the following topics:
  - What we do today
  - What is changing
  - Questions
  - Wrap up

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Acronyms

Abbreviation	Term
DB	Database
FNM	Full Network Model
NRI	New Resource Implementation
PDF	Project Details Form
RIMS	Resource Interconnection Management System

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WHAT WE DO TODAY

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New Resource Implementation: Starting a project at the ISO

Getting started

1 Determine how to start a project at the ISO.
Using the resource list below, determine how you will submit your project request to the ISO.

Resource project types to be created through NRI:	**Use:**
- Distributed Energy Resource (DERP) - SCME EIM onboarding - SCME EIM Updates - Existing resources converting from ISOME to SCME	➡ **New Resource Implementation Quick Start Guide** ➡ **Project Details Form**

All other project types to be created through RIMS:	**Use:**
	➡ **RIMS Quick Start Guide** ➡ **RIMS Project Details Form** ➡ **Create RIMS Project**

Focus of today's session

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Creating projects in RIMS: Today's process

- Customer completes Project Details Form (PDF)
- Customer uploads PDF to RIMS
- RIMS creates a project using the following criteria:
  - RIMS validates project creation based on >= 84 days from implementation date
  - Documentation buckets 1 & 2 due no less than 84 days from implementation

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WHAT IS CHANGING

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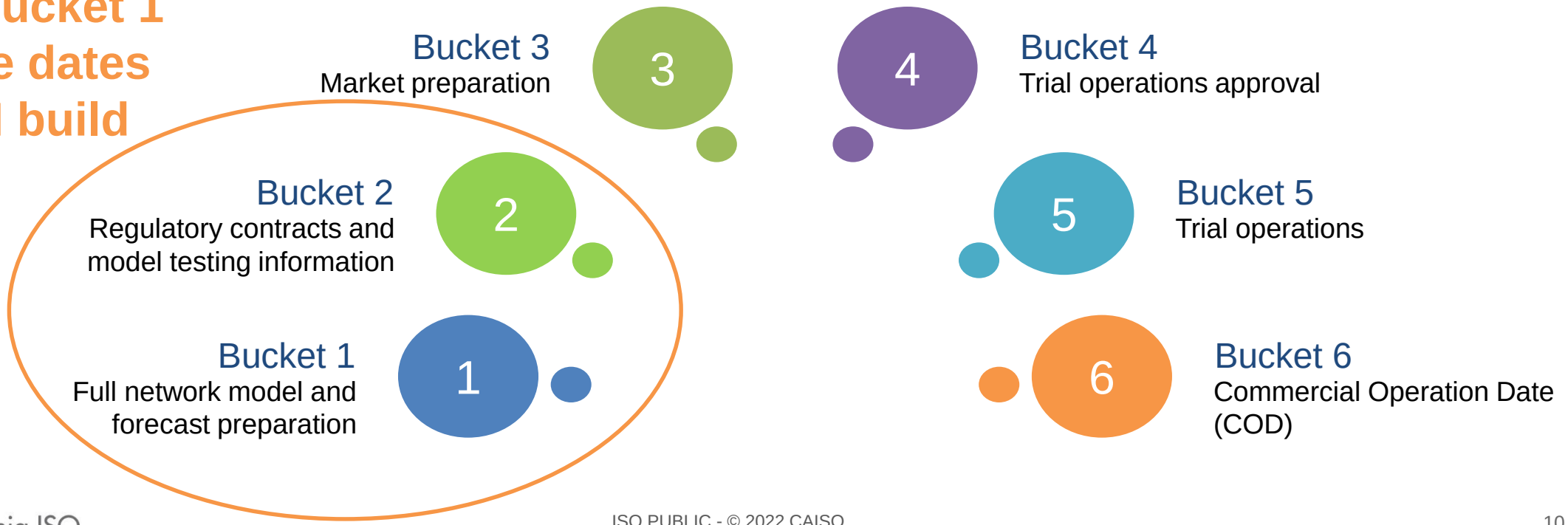
NRI Bucket System and FNM Release Schedule

- The ISO “bucket" system is derived from the Full Network Model database release schedule based on a generation project's estimated implementation date
- These due dates specify the **acceptance** deadline in order to be considered for the desired FNM model build

RIMS changes align Bucket 1 & 2 due dates to FNM build cycle



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How does project creation align with FNM build schedule?

Bucket 1 & 2 documentation must be **accepted** by this date

Project implementation date must be at least 15 days past this date

FNM Label	Customer Model Document Submission Deadline	ISO Publishes Final Scope	Production Deployment
22M1_DB110	10/14/2021	11/4/2021	Week of 1/10/2022
22M3_DB111	12/15/2021	1/5/2022	Week of 3/14/2022
22M4_DB112	2/2/2022	2/23/2022	Week of 4/25/2022
22M6_DB113	3/17/2022	4/7/2022	Week of 6/13/2022
22M7_DB114	5/5/2022	5/26/2022	Week of 7/25/2022
22M8_DB115	6/16/2022	7/7/2022	Week of 8/29/2022
22M10_DB116	7/21/2022	8/11/2022	Week of 10/3/2022
22M11_DB117	8/25/2022	9/15/2022	Week of 11/14/2022

* (Accurate as of June 21, 2021. Refer to FNM schedule on caiso.com for latest dates)

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How do these date changes affect you, the RIMS customer?

- Updated version of PDF (version 12a) must be used going forward
- If you upload PDFs to RIMS using the old timelines, your projects may not be created
- Instead, you'll receive an email indicating that there was an error with the submission
- You will need to select a new implementation date and re-upload the PDF

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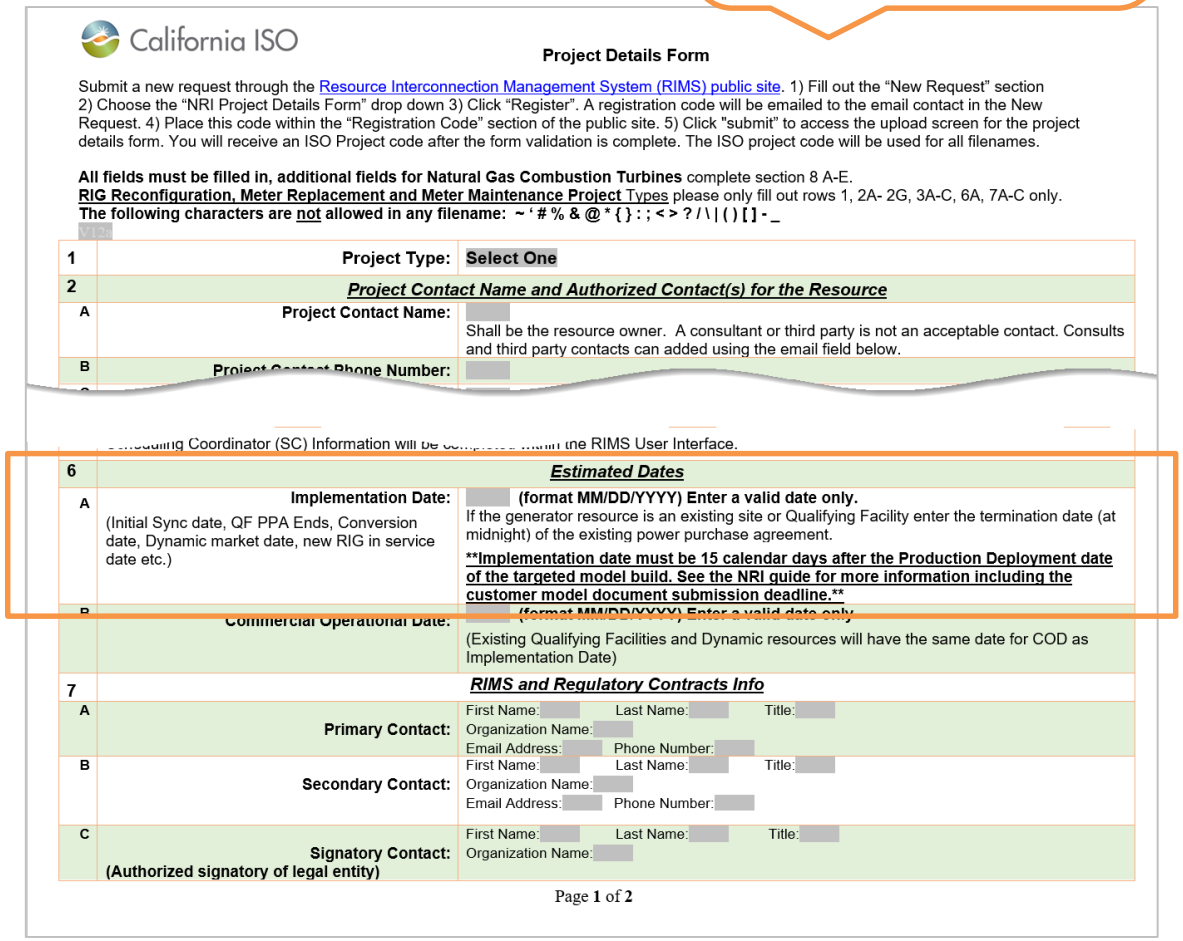
Creating projects in RIMS: New process

- Complete PDF (only new version 12a will be accepted)
- Upload to RIMS
- Project is created based on new criteria that checks:
  - Scope cut-off date (Customer Model Document Submission Deadline field), and
  - Implementation date is at least 15 calendar days past FNM build's production deployment effective date

PDF has been updated with new instructions



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Project Details Form

Submit a new request through the Resource Interconnection Management System (RIMS) public site. 1) Fill out the "New Request" section 2) Choose the "NRI Project Details Form" drop down 3) Click "Register". A registration code will be emailed to the email contact in the New Request. 4) Place this code within the "Registration Code" section of the public site. 5) Click "submit" to access the upload screen for the project details form. You will receive an ISO Project code after the form validation is complete. The ISO project code will be used for all filenames.

All fields must be filled in, additional fields for Natural Gas Combustion Turbines complete section 8 A-E.
RIG Reconfiguration, Meter Replacement and Meter Maintenance Project Types please only fill out rows 1, 2A- 2G, 3A-C, 6A, 7A-C only.
The following characters are not allowed in any filename: ~ ' # % & @ * { } : ; < > ? / \ | ( ) [ ] - _

1	**Project Type:**	**Select One**
2	***Project Contact Name and Authorized Contact(s) for the Resource***	
A	**Project Contact Name:**	Shall be the resource owner. A consultant or third party is not an acceptable contact. Consults and third party contacts can added using the email field below.
B	**Project Contact Phone Number:**	

Scheduling Coordinator (SC) Information will be completed within the RIMS User Interface.

6	***Estimated Dates***	
A	**Implementation Date:** (Initial Sync date, QF PPA Ends, Conversion date, Dynamic market date, new RIG in service date etc.)	**(format MM/DD/YYYY) Enter a valid date only.** If the generator resource is an existing site or Qualifying Facility enter the termination date (at midnight) of the existing power purchase agreement. ****Implementation date must be 15 calendar days after the Production Deployment date of the targeted model build. See the NRI guide for more information including the customer model document submission deadline.****
B	**Commercial Operational Date:**	**(format MM/DD/YYYY) Enter a valid date only** (Existing Qualifying Facilities and Dynamic resources will have the same date for COD as Implementation Date)
7	***RIMS and Regulatory Contracts Info***	
A	**Primary Contact:**	First Name: Last Name: Title: Organization Name: Email Address: Phone Number:
B	**Secondary Contact:**	First Name: Last Name: Title: Organization Name: Email Address: Phone Number:
C	**Signatory Contact:** **(Authorized signatory of legal entity)**	First Name: Last Name: Title: Organization Name:

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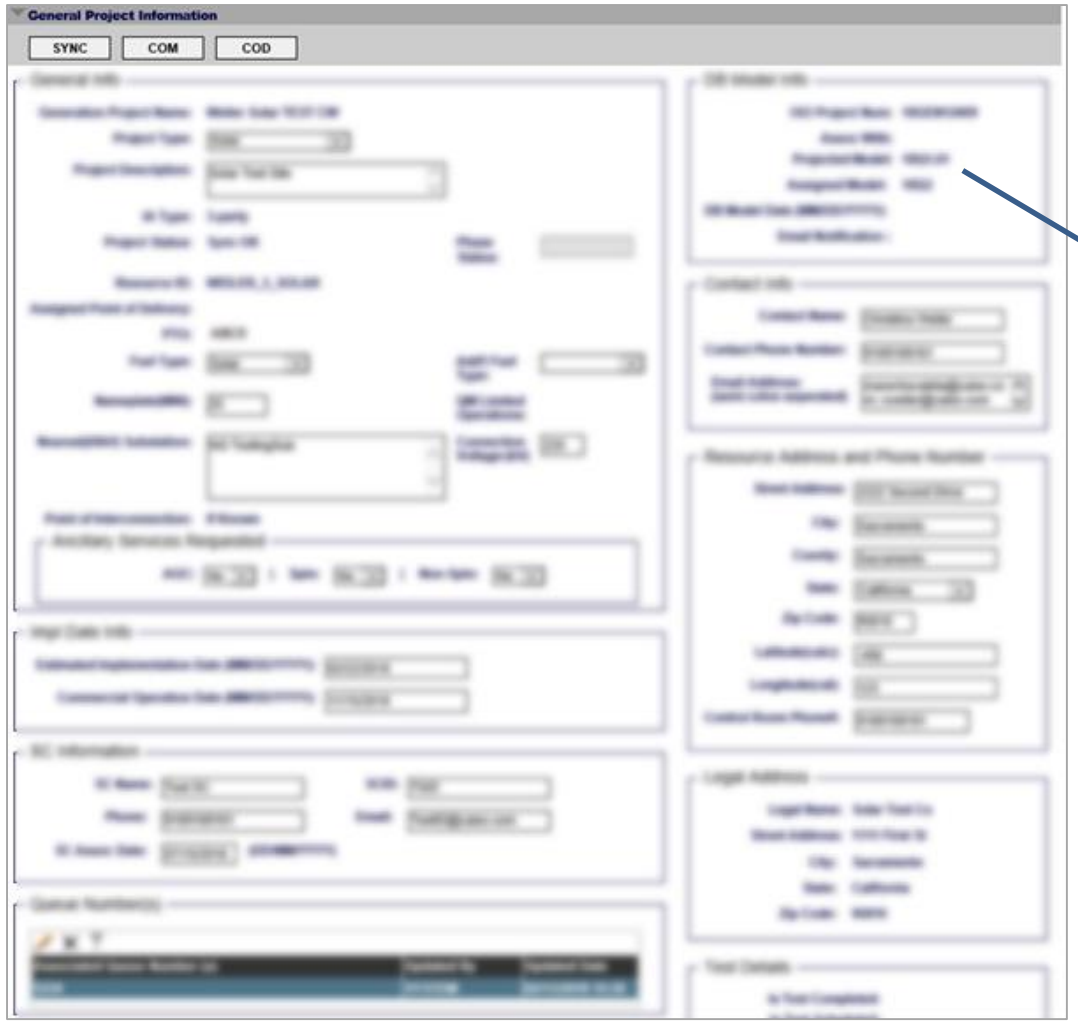
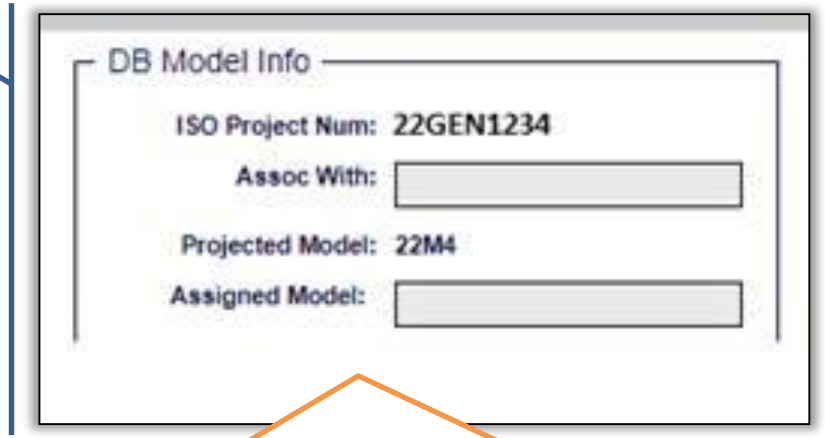
RIMS Project View: DB Model Info





- Projected Model is determined when project is created
- Assigned Model is determined when required documentation is accepted

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EXAMPLES

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Scenario 1 – Successful Creation

FNM Label	Customer Model Document Submission Deadline	ISO Publishes Final Scope	Production Deployment
22M1_DB110	10/14/2021	11/4/2021	**Week of 1/10/2022**
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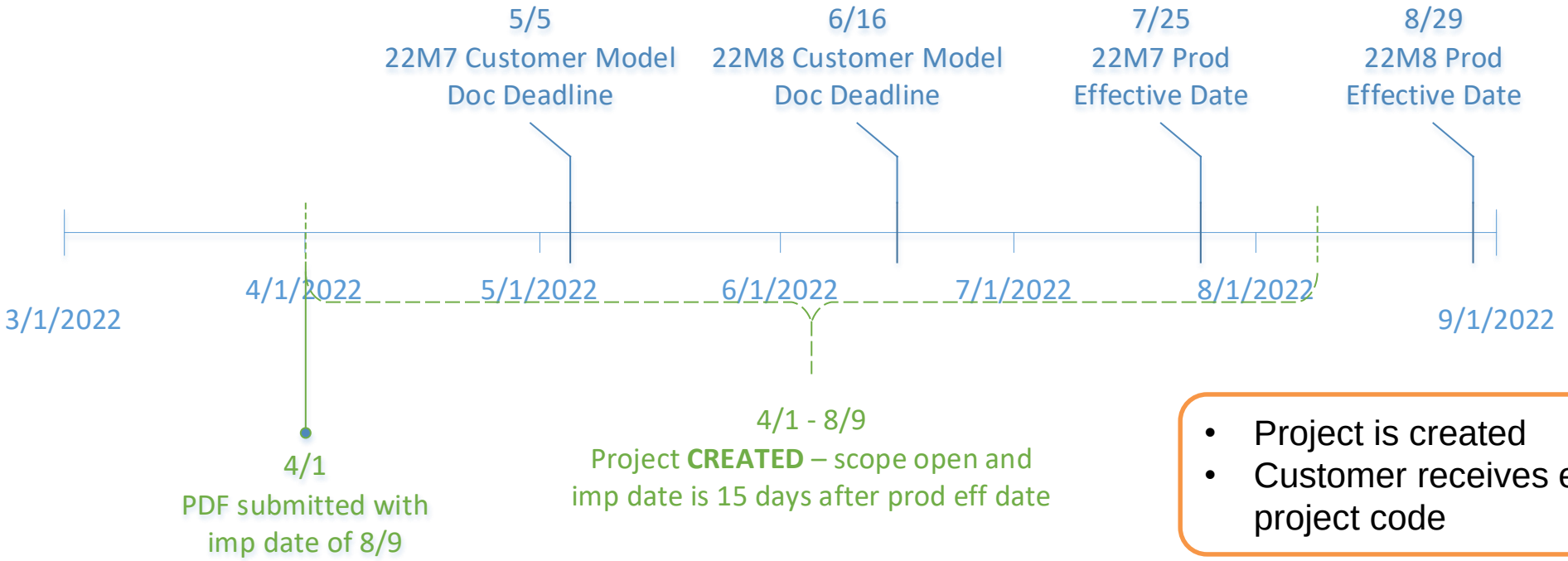
22M8_DB115	6/16/2022	7/7/2022	**Week of 8/29/2022**
22M10_DB116	7/21/2022	8/11/2022	**Week of 10/3/2022**
22M11_DB117	8/25/2022	9/15/2022	**Week of 11/14/2022**



- Project is created
- Customer receives email with project code

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Scenario 2 – Unsuccessful

FNM Label	Customer Model Document Submission Deadline	ISO Publishes Final Scope	Production Deployment
22M1_DB110	10/14/2021	11/4/2021	**Week of 1/10/2022**
22M3_DB111	12/15/2021	1/5/2022	**Week of 3/14/2022**
22M4_DB112	2/2/2022	2/23/2022	**Week of 4/25/2022**
22M6_DB113	3/17/2022	4/7/2022	**Week of 6/13/2022**
22M7_DB114	5/5/2022	5/26/2022	**Week of 7/25/2022**
22M8_DB115	6/16/2022	7/7/2022	**Week of 8/29/2022**
22M10_DB116	7/21/2022	8/11/2022	**Week of 10/3/2022**
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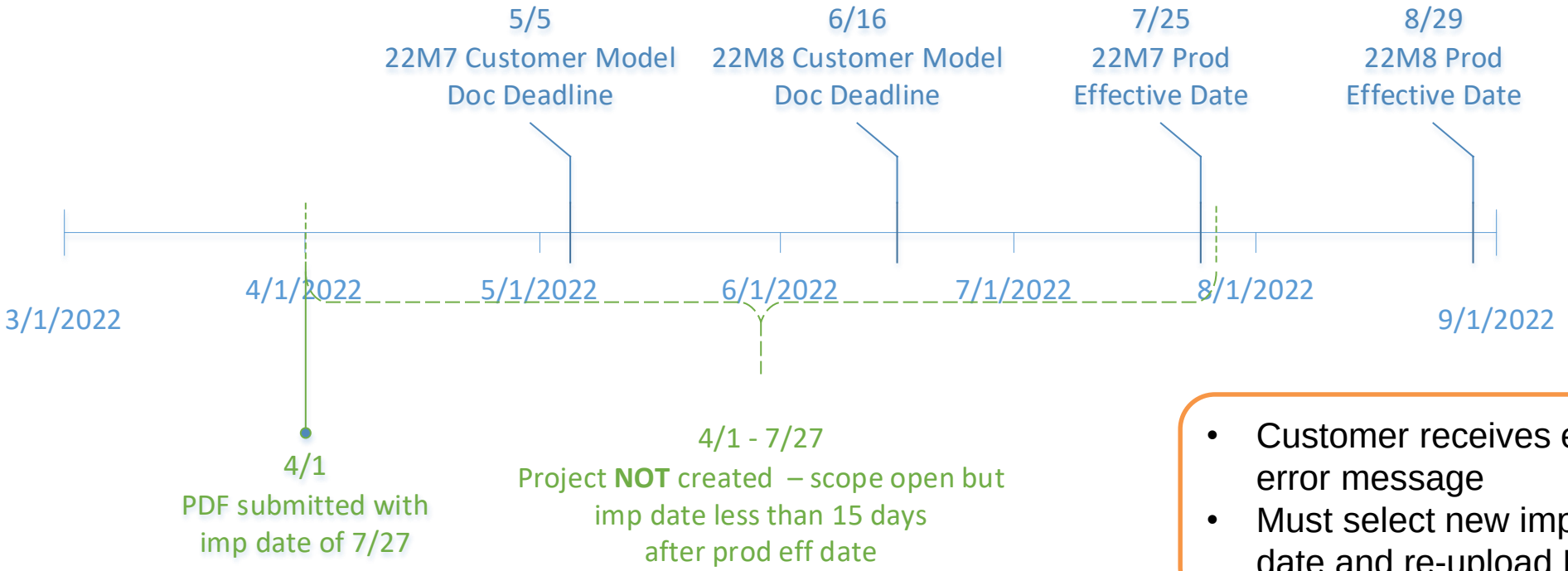

- Customer receives email with error message
- Must select new implementation date and re-upload PDF

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Scenario 3 – Unsuccessful

FNM Label	Customer Model Document Submission Deadline	ISO Publishes Final Scope	Production Deployment
22M1_DB110	10/14/2021	11/4/2021	**Week of 1/10/2022**
22M3_DB111	12/15/2021	1/5/2022	**Week of 3/14/2022**
22M4_DB112	2/2/2022	2/23/2022	**Week of 4/25/2022**
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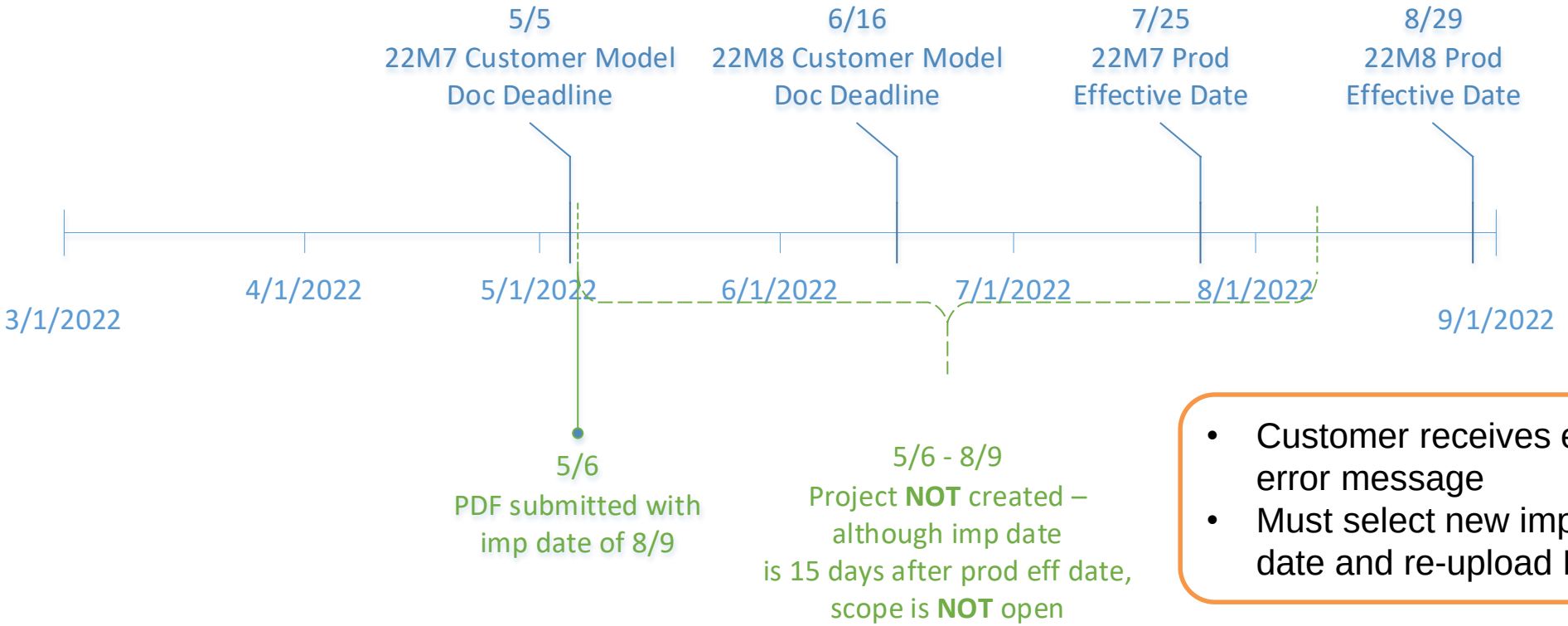

- Customer receives email with error message
- Must select new implementation date and re-upload PDF

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Key Points

- RIMS will be updated to align the documentation due dates with the Full Network Model build cycle

- When selecting project implementation date, ensure the following:
  1) FNM DB scope window is still open for targeted model build, and
  2) Implementation date is at least 15 days past the model build's production deployment effective date

- The following items will be updated:
  - NRI Guide
  - RIMS Project Details Form
  - RIMS Quick Start Guide

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Questions

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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

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REFERENCE MATERIAL

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Reference Material

- 2022 Full Network Model build schedule:
  - http://www.caiso.com/Documents/FullNetworkModelSchedule2022ISO.pdf
- Network and Resource Modeling webpage:
  - http://www.caiso.com/market/Pages/NetworkandResourceModeling/Default.aspx
- New Resource Implementation process and requirements webpage:
  - http://www.caiso.com/participate/Pages/NewResourceImplementation/Default.aspx
    - (contains the NRI Guide, RIMS Project Details Form, and RIMS Quick Start Guide)

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