

# Transmission Service and Market Scheduling Priorities – Phase 2 (TSMSP 2)

## *Track 2 – Daily Process*

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### Today's Trainer

**Dottie Vance**  
**Customer Readiness**  
**Trainer**

Rev 4/9/2024

- Fixed OASIS Tech Specs location link (slide 53)
- Updated total to webWheel capacity release examples (starting slide 36)

# Housekeeping



## REMAIN MUTED

Keep yourself muted to minimize background noise



## ASKING QUESTIONS

Unmute to ask verbal questions or write in the chat pod



## RAISING HAND

Raise your hand using WebEx interactivity tools

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# Our Meeting Agenda

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## Today we will cover...

- Recap TSMSP2 Track 1 – *Monthly Process*
- Understand and walkthrough the application-specific details for daily process
- Prepare for market simulation and readiness activities

# Acronyms

Abbreviation	Term
ATC	Available Transfer Capability
CIRA	Customer Interface for Resource Adequacy
DAM	Day-Ahead Market
IRDT	Intertie Resource Data Template
NLN	Native Load Needs
OASIS	Open Access Same-time Information System
PWT	Priority-Wheeling-Through
SC	Scheduling Coordinator
SIBR	Scheduling Infrastructure and Business Rules
TRM	Transmission Reliability Margin
TTC	Total Transfer Capability
UI	User Interface
WAC	Wheeling Access Charge



[PRR: 1560](#)

## NEW PROCESS FOR ESTABLISHING WHEELING THROUGH PRIORITY

- **Available Transfer Capability (ATC)** is secured in advance on the ISO interties to establish wheeling through priority equal to ISO load.
  - ATC can be reserved in
    - Monthly increments (13-month horizon)
    - Daily increments (7-day horizon).
- Wheeling through transactions without secured ATC in advance will have a lower market clearing priority.



# Implementation Timeline



For additional details, refer to the [Policy Initiative Page for Transmission Service and Market Scheduling Priorities](#) [link!](#)

## Refresher from TSMSP2 Track 1 – Monthly Process

# GAINING ACCESS to webWheel



### Master File

- ✓ Already Registered
- Need to Register
  - 11 BD in advance

[New Intertie Resource Request template](#)

# New Intertie Resource Request: Register a high-priority wheel

- Submit **New Intertie Resource Request** form a via CIDI ticket
- Navigation: caiso.com > Market & Operations > Network and Resource Modeling
  - Scroll down to the **Resource data submission** section to locate the form

## **Resource data submission**

The Generator Resource Data Template and the Intertie Resource Data Template are used to submit requests to add or change specific operating parameters that reside in the Master File. For updates to existing data, scheduling coordinators must make any changes on the templates downloaded from the Master File user interface or application programming interface. Scheduling coordinators then submit updated templates using the user interface UPLOAD function or the programming interface SUBMIT services. Requests for new system resources should be sent to [RDT@caiso.com](mailto:RDT@caiso.com) in the New Intertie Resource Request template.

 **15-min Self-Scheduled Variable Energy Resource Request** 12/05/2017 16:03

 **Intertie Resource Data Template Version 6.0** 6/11/2021 09:44

 **GRDT and IRDT Definitions** 1/28/2022 10:29

This spreadsheet contains the data field names, descriptions, and related validation rules that apply to the Generator Reference Data Template (GRDT) and Intertie Reference Data Template (IRDT).

 **New Intertie Resource Request** 7/15/2021 09:08

 **Generator Resource Data Template Version 16.0** 10/28/2021 08:34

 **Group Constraints Request Form Version 2** 4/27/2016 10:46





# Refresher from TSMSP2 Track 1 – Monthly Process

## GAINING ACCESS to webWheel

### Master File

- ✓ Already Registered
- Need to Register
  - 11 BD in advance

[New Intertie Resource Request template](#)

### AIM

#### Existing SC Contract Types

- Scheduling Coordinator Agreement + MSA/SC
- SCT – Scheduling Coordinator Agreement Only

**UAA to provision webWheel access**

# Recap from Monthly Process Training

## Scheduling Infrastructure and Business Rules (SIBR)

Validate Import/Export for power contracts and review [SIBR User Guide Section 3.2.8](#)

## Customer Interface for Resource Adequacy (CIRA)

CAISO BAA LSEs

New screen: Native Load Needs (NLN)

[CIRA User Guide Section 3.13](#)

## Open Access Same Time Information System (OASIS)

New report: ATC for PWT Requests



## webWheel

High level overview

How to submit a power contract, request PWT, and view PWT awards.

## Settlements

Wheeling Access Charge (WAC) examples and walkthrough

[TSMSP2 Track 1 – Monthly Process Training Presentation](#)

# What Questions Do You Have?



Unmute yourself

or



Raise your hand

# Review Application Specific Details



# webWheel

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## Section Focus

- Walk through requesting priority-wheeling-through (PWT) for the daily process
- Understand the Capacity Release functionality
- Review the PWT Position & Contract Utilization reports.



Specifically for the Daily Process

# SUBMITTING PWT REQUESTS & VIEWING AWARDS



# Participant Dashboard Refresher



The screenshot shows the Participant Dashboard interface. At the top, there is a navigation bar with 'Data', 'Operations', 'Reports', 'Administration', 'My Settings', and 'System'. The main content area is divided into several sections:

- Submission Window Status:** A section with four icons: 'Open' (Completed 6 days ago), 'Lock' (Completed 6 days ago), 'Award' (16 days ago), and 'Publish'. A callout box explains: "Submission Window Status provides summary of where the submission process is at".
- News and Announcements & Activity Log:** A section with two sub-sections. 'News and Announcements' shows 'No News and Announcement have been found'. 'Activity Log' is empty. A callout box explains: "News and Announcements & Activity Log Provides updates on what is happening in the app."
- Records:** A table with columns: ID, Participant, Contract, Product, Pro-Rata, Partial, Period Start, Period End, Request MW, Status. The table is empty, showing 'No Records Have Been Found'. A callout box explains: "Records Summary of user's information. Remember, users are restricted to only see their information."
- PWT Request Counts:** A section with three rows of buttons: 'Contracts', 'Accepted', 'Rejected'; 'Import Interties', 'Accepted', 'Rejected'; and 'Export Interties', 'Accepted', 'Rejected'. A callout box explains: "PWT Request Counts This area shows participant's requests that have been submitted into the system."

# Submission Window for Daily Process

- Open for 5 Hours (*between 7am-noon PST each day*)
- Will be defined in the Market Operations BPM

## Monday 3/25/2024

- Participant can request between 3/27 - 4/1/2024
- ✓ Assume daily request for 3/27 is accepted and awarded
- Results published on 3/25 @ 1pm

## Tuesday 3/26/2024

- Day-Ahead Market for Operating Date 3/27/2024 closes at 10AM

Example located in Appendix

# When the Submission Window Opens....

The screenshot shows the top navigation bar of the DATI web application. The 'Operations' menu is expanded, showing the following items: PWT Requests, PWT Awards, Participant Dashboard, Action Log, and LT PWT Awards. A green arrow points from a callout box to the 'PWT Requests' item. The callout box contains the text: **PWT Requests**  
Once the submission window opens, participants will be allowed to enter requests.

# Adding a New PWT Request



Data Operations Reports Administration My Settings System

Participant Dashb... x PWT Requests x

PWT Requests Summary

ID	Participant	Contract	Import Intertie	Export Intertie	Product	Accept Pro-Rata	Accept Partial	Period Type	Annual Hours	Status	Submission Window	1/2024	2/2024	3/2024
No Records Have Been Found														

Click the "new" icon to add a PWT Request

# Creating PWT Request – *Period Type*

1

Period Type: \*

Participant: \*

Contract: \*

Import Intertie:

Export Intertie:

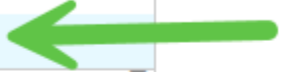
Product: \*

Periods:   -

Profile Type: \*

Accept Pro-Rata:

Accept Partial:



**Period Type** allows users to choose a Monthly or Daily request.

# Creating PWT Request – *Participant, Contract, Import & Export, Product*



2

Period Type:

Participant:

Contract:

Import Intertie:

Export Intertie:

Product:

Periods:   -

Profile Type:

Accept Pro-Rata:

Accept Partial:

By picking the desired **Participant** and **Contract**, the system will populate the **Import/Export Interties** and the defaulted **Product Type**.



# Creating PWT Request – *Periods*

Data Operations Reports Administration My Settings System

Participant Dashb... PWT Requests PWT Request

## PWT Request

The 03/27/2024 submission window is for 03/26/2024 at 07:00 AM

Period Type: **Single Day**  
Today  
Yesterday  
Tomorrow

Submission Window: **Daily**

Participant: **Date Range**  
Date Range

Contract: **Weekly**  
This Week  
Last Week  
Next Week

Import Intertie:  
Export Intertie:

Product: **Bal-Week**

3 **Periods:** **Date Range** 03/27/2024 - 04/02/2024

Profile Type:

Accept Pro-Rata:

Accept Partial:

**Periods:** There are a number of options available for the daily process (up to 7 day range period).  
*Suggested period to use for Market Sim is "Date Range"*

# Creating PWT Request – Profile Type (Flat)

## PWT Request

Period Type:

Submission Window:

Participant:

Contract:

Import Intertie:

Export Intertie:

Product:

Periods:   -

4

Profile Type:

Remaining Capacity MW:

Request MW:

Accept Pro-Rata:

Accept Partial:

**This Profile Type is Flat.**

Users will be shown their remaining MW and can request the desired amount of MWs to use.

# Creating PWT Request – Profile Type (Variable)

## PWT Request

Period Type:

Submission Window:

Participant:

Contract:

Import Intertie:

Export Intertie:

Product:

Periods:   -

**5** Profile Type:

Accept Pro-Rata:

Accept Partial:

Dates	Remaining Capacity MW	Request MW
03/28/2024	0	
03/29/2024	0	
03/30/2024	0	
03/31/2024	0	
04/01/2024	0	
04/02/2024	0	
04/03/2024	0	

**This Profile Type is Variable.**

Users will be prompted to enter their requested MW as it correlates with the desired month

# Creating PWT Request – *Pro-Rata and Accept Partial*

## PWT Request

Period Type:

Submission Window:

Participant:

Contract:

Import Intertie:

Export Intertie:

Product:

Periods:   -

Profile Type:

Users have the option to request **Accept Pro-Rata** and/or **Accept Partial.**

6

Accept Pro-Rata:

Accept Partial:

# Submitting the PWT Request – Status Column



Data Operations Reports Administration My Settings System

Participant Dashb... PWT Awards PWT Requests

PWT Requests Summary

PWT Request ID	Participant	Contract	Import Intertie	Export Intertie	Product	Accept Pro-Rata	Accept Partial	Period Type	Period Start	Period End	Total Hours	Status	Submission Window
Status													
✓ Proces...													
! Rejected													
✓ Awarded													
✓ Awarded													
✓ Awarded													
✓ Proces...													



# Reviewing PWT Awards

Navigation menu: Data, Operations, Reports, Administration, My Settings, System

Dropdown menu (under Operations):

- PWT Requests
- PWT Awards ←
- Participant Dashboard
- Action Log

Bottom icons: Home, Lock, Settings, Up Arrow

Navigation menu: Data, Operations, Reports, Administration, My Settings, System

Tabbed interface: Participant Dashb... (closed), PWT Awards (active)

## PWT Awards

Participant	Contract	Import Intertie	Export Intertie	PWT Request ID	Submission Window	Product	Accept Pro-Rata	Accept Partial	Profile	2/2024
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No Records Have Been Found



# What Questions Do You Have?



Unmute yourself

or



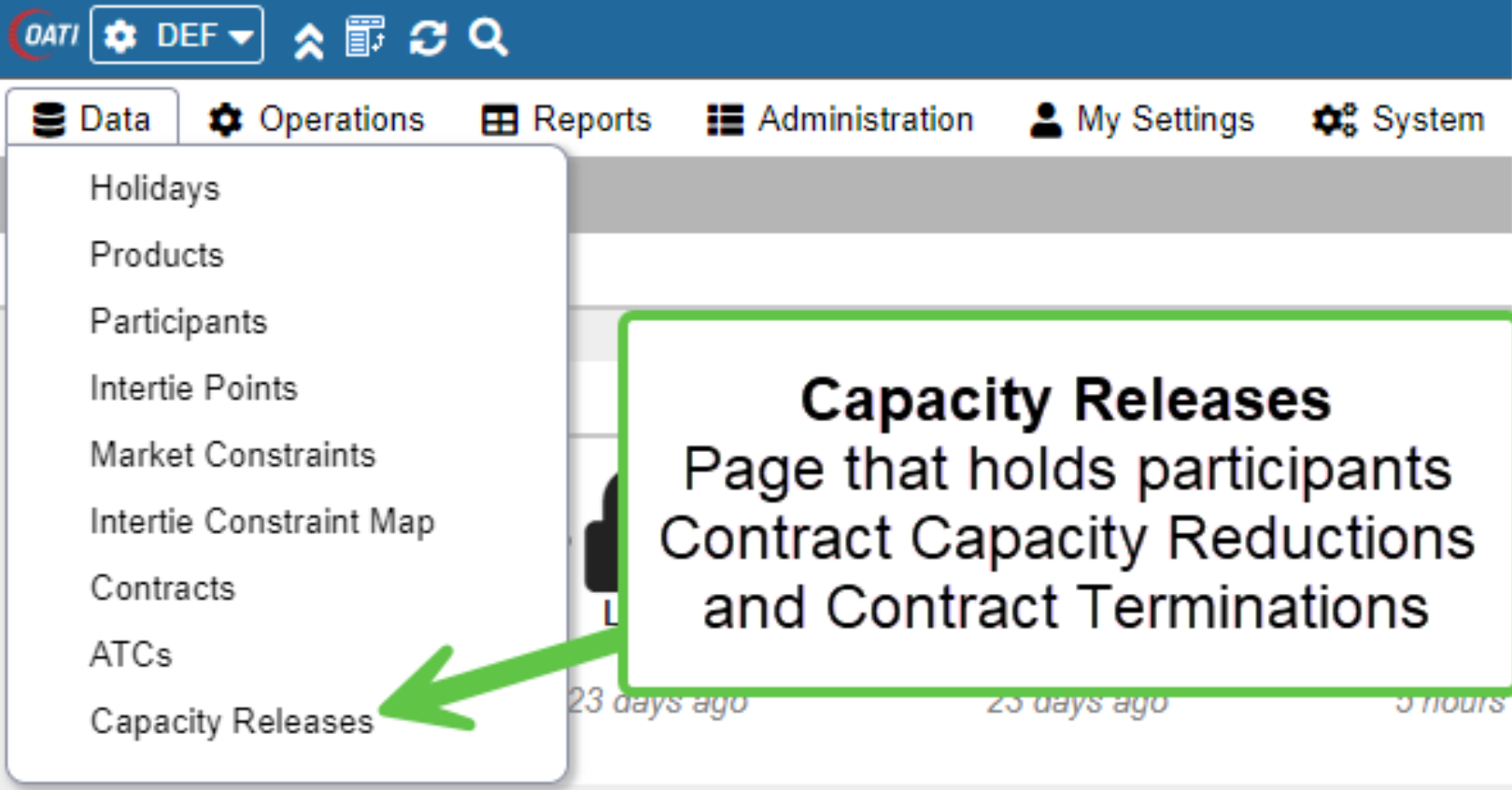
Raise your hand



Understanding where to locate and process

# CAPACITY RELEASES

# Location: Data tab > Capacity Releases

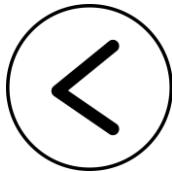


**Not tied to the daily process**

# Capacity Release

The act of releasing PWT ATC back to the market

1



## Contract MW < Awarded MW

Users must reduce the awarded PWT MW positions to the contracted MW.

2



## Service Hours Shorter

Users must cut short the PWT positions to fit the new contracted service hours.

3



## Shorter Contract Duration

Users must cut short the PWT positions to fit the new contract period.

Users must notify the ISO no later than 11 days before the start of the changed contract

# Capacity Release Summary Page



Participant Dashb... x Capacity Releases x

Capacity Release Summary

<input type="checkbox"/>	Capacity Release ID	Participant	Contract	Release Type	Period Start	Period End	New Contract End	Status	Total Released Capacity MW	Total Released ATC MW	MW by Limit Status
<input type="checkbox"/>											



**Capacity Release Summary**  
High-level overview of capacity reduction and termination requests.

# New Capacity Release Request – *Participant and Contract*

## New Capacity Release

Participant: \*

Contract: \*

Release Type: \*

Original Contract Period:  to

**Participant** and **Contract** are drop down menus from previous registered information.

Select the desired participant/contract that would like to be utilized.

# New Capacity Release Request – *Release Type*

**New Capacity Release**

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Participant:\*

Contract:\*

 Release Type:\*

Original Contract Period:

- Contract Termination
- Contract Capacity Reduction

**Release Type** will have two options for users to select from:

- Contract Termination
- Contract Capacity Reduction

**Important:** For both Contract Termination and Contract Capacity Reduction, users must notify the ISO no later than 11 days before the start of the changed contract

# New Capacity Release Request – *Contract Capacity Reduction*

## New Capacity Release

Participant:

Contract:

Release Type:

Original Contract Period:  to

Contract Capacity:	Month	Original Capacity MW	Modified Capacity MW	Awarded MW	Modified Award MW		Award MW Mismatch	Released ATC MW
					100368	Total		
	01/2024							
	02/2024							



# New Capacity Release Request – *Contract Capacity Reduction Cont.*



Month	Original Capacity MW	Modified Capacity MW	Awarded MW	Modified Award MW		Award MW Mismatch	Released ATC MW
				100368	Total		
01/2024							
02/2024							

**Original Capacity MW:** This is the MWs the ISO awards users

**Modified Capacity MW:** This is how many MWs participants wanted to change their amount to

**Awarded MW:** This is what participants end up receiving

**Modified Award MW:** The PWT awards that participants can modify to fit their contract

**Award MW Mismatch:** Will indicate to participants how many MWs need to be reduced

**Released ATC MW:** Will indicate the MWs reduced during the capacity reduction

# New Capacity Release Request – Contract Capacity Reduction Example

User is awarded 352 MW



Month	Original Capacity MW	Modified Capacity MW	Awarded MW	100238 (PWT Award)	100253 (PWT Award)	100254 (PWT Award)	Total	Award MW Mismatch	Released ATC MW
06/2024	500	300	352	176	90	86	352	-52	0

**-52 MWs**

**Will need to be 0**

**Will need to be 52**

# New Capacity Release Request – Contract Capacity Reduction Example

Users will decide where to subtract the -52 MWs from the PWT Awards

**-52 MWs**

Month	Original Capacity MW	Modified Capacity MW	Awarded MW	100238 (PWT Award)	100253 (PWT Award)	100254 (PWT Award)	Total	Award MW Mismatch	Released ATC MW
06/2024	500	300	352	176	90	86	352	-52	0



**Let's make this a 40 to remove 50 MWs**

# New Capacity Release Request – Contract Capacity Reduction Example

Notice that the Award MW Mismatch decreases while the Released ATC MW increases

**-52 MWs**

Month	Original Capacity MW	Modified Capacity MW	Awarded MW	100238 (PWT Award)	100253 (PWT Award)	100254 (PWT Award)	Total	Award MW Mismatch	Released ATC MW
06/2024	500	300	352	176	40	86	302	-2	50

**Let's make this a 84 to remove the remaining 2 MWs**

# New Capacity Release Request – Contract Capacity Reduction Example

-52 MWs

Month	Original Capacity MW	Modified Capacity MW	Awarded MW	100238 (PWT Award)	100253 (PWT Award)	100254 (PWT Award)	Total	Award MW Mismatch	Released ATC MW
06/2024	500	300	352	176	40	84	300	0	52

**To know if you were successful**

- ✓ Award MW Mismatch will be 0
- ✓ Released ATC MW -52 (the amount indicated to be released)

# New Capacity Release Request – Contract Capacity Reduction No Impact Example



Month	Original Capacity MW	Modified Capacity MW	Awarded MW	100238 (PWT Award)	100253 (PWT Award)	100254 (PWT Award)	Total	Award MW Mismatch	Released ATC MW
06/2024	500	315	300	100	100	100	300	0	0

**15 MWs extra**

Since you the Modified Capacity MW is larger than the Awarded MW, there is no change needed


# New Capacity Release Request – *Release Type*

**New Capacity Release**

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Participant:\*

Contract:\*

 Release Type:\*

Original Contract Period:

- Contract Termination
- Contract Capacity Reduction

**Release Type** will have two options for users to select from:

- Contract Termination
- Contract Capacity Reduction

# New Capacity Release Request – *Contract Termination*

## New Capacity Release

Participant:

Contract:

Release Type:

Original Contract Period:  to

New Contract End:

Month	Original Capacity MW	Modified Capacity MW	Awarded MW	Modified Award MW			Released ATC MW
				100360	100361	100364	
03/2024							
04/2024							
05/2024							
06/2024							

The awards will need to be set as 0

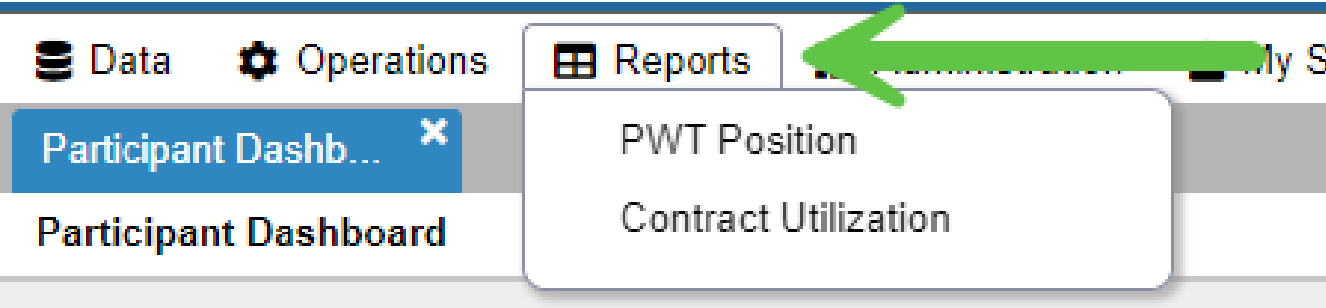
Once the contract is updated, webWheel will check PWT positions and re-adjust them for any violations.



Helpful reports to review

# PWT POSITION AND CONTRACT UTILIZATION REPORTS

# Location of PWT Position and Contract Utilization Reports



**PWT Position** and **Contract Utilization** are two reports that users can use to review their information/request details.

# PWT Utilization Report



PWT Positions

Filtered By: Compute Totals: None x

Participant	Direction	Intertie	Profile	1/2024	2/2024	3/2024	4/2024	5/2024	6/2024	7/2024	8/2024	9/2024	10/2024	11/2024	12/2024	
	Export		Contract Capacity (MW)													
			Requested (MW)													
			Awarded (MW)													
			Remaining (MW)													
			Released (MW)													
	Export		Contract Capacity (MW)													
			Requested (MW)													
			Awarded (MW)													
			Remaining (MW)													
			Released (MW)													
	Import		Contract Capacity (MW)													
			Requested (MW)													
			Awarded (MW)													
			Remaining (MW)													
			Released (MW)													

Report provides information on PWT Positions at a glance.

# Contract Utilization Report



## Contract Utilization

Name	Participant	Product	Period Start	Period End	Profile Type	Submission Window	PWT Request ID	Status	Profile	3/2024	4/2024
		1*24	03/01/2024	01/01/2025	Variable	06/2024		Awarded	Requested (MW)		
									Awarded (MW)		
									Released (MW)		
									Net Awarded (MW)		
								Awarded	Requested (MW)		
									Awarded (MW)		
									Released (MW)		
									Net Awarded (MW)		
		Contract Totals	Contract Capacity (MW)								
			Total Requested (MW)								
			Total Awarded (MW)								
			Capacity Released (MW)								
			Remaining (MW)								
1*16	01/01/2024	01/01/2025	Variable	Contract Totals	Contract Capacity (MW)						
					Total Requested (MW)						
					Total Awarded (MW)						
					Capacity Released (MW)						
					Remaining (MW)						
1*24	03/01/2025	04/01/2025	Flat	Contract Totals	Contract Capacity (MW)						
					Total Requested (MW)						
					Total Awarded (MW)						
					Capacity Released (MW)						
					Remaining (MW)						

# What Questions Do You Have?



Unmute yourself

or



Raise your hand

# Scheduling Infrastructure and Business Rules (SIBR)

## Section Focus

- Recapping user expectations in SIBR

# SCs Scheduling Wheeling Remains the Same

- Review: [SIBR User Guide Section 3.2.8 Wheeling Bid Walkthrough](#)
- No UI Changes

The screenshot displays the SIBR interface with the following components:

- Market:** Day Ahead, **Date:** 12/20/2022
- Bid summary table:**

Status	Resource type	Resource ID	State	Daily	Hourly	Energy	Energy Adj	STD	ETC	ETP	TOR
✓	Inter-Tie	_PITTBAY_E_WHL_1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A			N/A	
✓	Inter-Tie	_POTTBAY_J_WHL_1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A			N/A	
- Schedule table:**

Hour	Open tie indicator	NERC tag	Schedule coordinator	Schedule point	Primary tie	PSE id	Registered resource	Counter resource
01h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
02h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
03h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
04h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
05h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
06h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
07h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
08h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
09h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1
10h	N						<input checked="" type="checkbox"/>	_POTTBAY_J_WHL_1

# SCs Scheduling Wheeling Remains the Same

## What Happens

When it is time to be awarded PWT, the results are sent from webWheel to SIBR to be stored and validated

## User's Responsibilities

- Participants must validate
1. Resources **Import** and **Export** belong to the same contract
  2. It is scheduled for the wheel transaction

There can only be one counter resource per Wheeling Transaction for the trading hour.



# Open Access Same-Time Information System (OASIS)

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## Section Focus

- Review new report “ATC for PWT Requests” for the daily process

- Current Transmission Usage
- Transmission Outages
- Transmission Interface Usage
- Market Available Transmission Capacity
- ATC for PWT Requests

Welcome to the California ISO Open Access site. On OASIS you will find real-time data and its Market, such as system demand status, market prices and market results.

**New Report** on OASIS, under the Transmission tab called "ATC for PWT Requests"



### Standards Information

- North American Energy Standards Board (NAESB)
- ISO Business Practice Manuals
- Available Transfer Capability Information

### Transmission Information

- Base Case Data
- Interconnection Study Statistics

### System Help

- All technical specifications and artifacts for OASIS are available on the [ISO Developer site](#). Self-registration is required to access the site.
- To download data without using the OASIS interface, see [How to use report URLs to download OASIS data](#) on the ISO Developer site.
- Access non-technical OASIS reference documents on [www.caiso.com](http://www.caiso.com)

[PRR 1558 for the Market Operations BPM](#)

# New Report ATC for PWT Requests – *Daily Process*

California ISO OASIS

ATLAS REFERENCE REPORT DEFINITION PRICES TRANSMISSION SYSTEM DEMAND ENERGY ANCILLARY SERVICES CONGESTION REVENUE RIGHTS PUBLIC BIDS RESOURCE ADEQUACY

Opr Date: 03/14/2024 Horizon: **Daily** Monthly Market Constraint: [ALL] Apply Reset

Download XML

### ATC for PWT Requests

1 - 20 of 108

Opr Date ↑ Horizon ↑ Constraint Name ↑ Direction ↑ PWT ATC Priority-Wheeling-Through Awards Available Transfer Capability (ATC) Total Transfer Capability (TTC) Native Load Needs (NLN) Transmission Reliability Margin (TRM)

## This report displays (*Current Day + Rolling Window*):

- Calculated initial PWT ATC values
- Priority-Wheeling-Through Awards (PWT)
- Available Transfer Capability (ATC)\* *Includes ETC*
- Total Transfer Capability (TTC)
- Native Load Needs (NLN)
- Transmission Reliability Margin (TRM)

Located on [Developer Portal](#) >> Tech Specs >> OASIS API URL 7.5.1 Examples & OASIS Interface Specification v7.5.1.pdf

# Downloading the Report – *Daily Process*

Opr Date: 03/14/2024  31 Horizon: **Daily** Market Constraint: [ALL]

### ATC for PWT Requests

1 - 20 of 108

Opr Date	Horizon	Constraint Name	Direction	PWT ATC Priority-Wheeling-Through Awards Available Transfer Capability (ATC) Total Transfer Capability (TTC) Native Load Needs (NLN) Transmission Reliability Margin (TRM)
03/14/2024	Daily		Export	
03/14/2024	Daily		Import	
03/14/2024	Daily		Export	
03/14/2024	Daily		Import	
03/14/2024	Daily		Export	

The **DAILY** group zip will contain the data for the selected day (1 Day)

# What Questions Do You Have?



Unmute yourself

or



Raise your hand

# Settlements

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## Section Focus

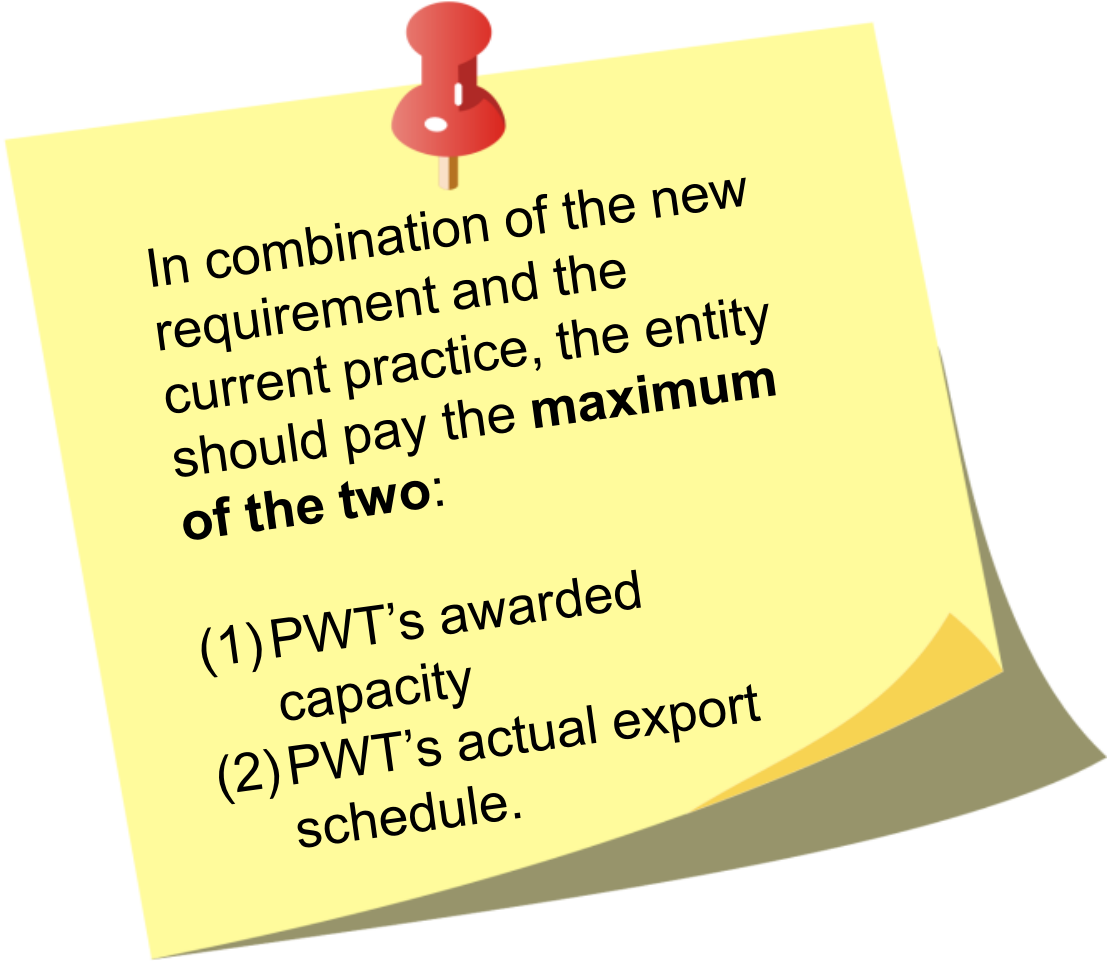
- Review settlement impacts for PWT

# Updates to the Wheel Export Quantity PC

- Wheel Export Quantity Pre-calculation modified
  - Resale calculation & original PWT transaction + existing export quantity calculations
- Indirectly impacts
  - High Voltage Wheeling Access Charge allocation (CC 382)
  - Low Voltage Wheeling Access Charge allocation (CC 383)
- Review WAC Charge for PWT ATC awards on settlement statement

[PRR 1560 for Settlements and Billing BPM](#)

# Recap from Previous WAC Examples



In combination of the new requirement and the current practice, the entity should pay the **maximum of the two**:

- (1) PWT's awarded capacity
- (2) PWT's actual export schedule.

[CG PC Wheel Export Quantity 5.6](#)



# What Questions Do You Have?



Unmute yourself

or



Raise your hand

A graphic featuring a line chart with data points and a bar chart in the background. The line chart has 11 data points with values: 6.8524, 9.2357, 2.9514, 7.3571, 5.357, 8.6739, 3.1958, 0.1738, 7.5739, and 4.7452. Each point is marked with an upward or downward arrow. The bar chart consists of 15 vertical bars of varying heights. The title 'Market Simulation Activities' is overlaid in large white text.

# Market Simulation Activities

## Section Focus

- Unstructured Guided Scenarios

# Market Simulation

TSMSP2 Daily Process  
 Unstructured Guided Market  
 Sim starts on: **April 15<sup>th</sup>**

- View the [CAISO public calendar](#) for full schedule
- View the Unstructured scenario on the [Release Planning](#) page

Scenario Number	Unstructured scenario	
2	Description	Facilitate submission and retrieval of Daily PWT requests and awards.
	ISO Actions	<ol style="list-style-type: none"> <li>1. Define submission windows for Daily PWT requests.</li> <li>2. Verify Daily PWT requests and prepare Daily PWT awards.</li> </ol>
	WEIM Market Participant Actions	N/A
	ISO Market Participant Actions	<ol style="list-style-type: none"> <li>1. Submit PWT requests and verify received awards for Daily process.</li> <li>2. Review PWT ATC awards for Daily process.</li> <li>3. Verify wheeling access charges (WAC) for periods PWT ATC is reserved.</li> </ol>
	Expected Outcome	Participants to verify: <ol style="list-style-type: none"> <li>1) PWT request submission.</li> <li>2) PWT awards review.</li> <li>3) Review results in OASIS.</li> <li>4) Review PWT awards in SIBR</li> <li>5) Review PWT awards in Settlements.</li> </ol>
	Anticipated Settlement Outcome	Verify wheeling access charge for PWT ATC awards
	Expected Settlement Outcome	Wheel export quantity pre-calc CC382- High voltage, CC383- low voltage

# Functional Environment Options for CIDI Cases

CONTACT CUSTOMER SUPPORT  
TELL US HOW WE CAN HELP

\* SCID

\* Functional Environment  
--None--  
--None--  
Production  
Market Simulation  
Release  
RC Integration  
RC Shadow Operations  
Parallel Operations  
Request

Review for Price Correction

Manual Reference Level Change Request

\* Subject

- Inquiries not directly related to Market Simulation issues & when there is no environment impact
  - Ex. Business Requirements Specifications (BRS) comments, implementation questions, feedback, etc.
- Contact: [release@caiso.com](mailto:release@caiso.com)

CONTACT CUSTOMER SUPPORT  
TELL US HOW WE CAN HELP

\* SCID

\* Functional Environment  
--None--  
--None--  
Production  
Market Simulation  
Release  
RC Integration  
RC Shadow Operations  
Parallel Operations  
Request

Review for Price Correction

Manual Reference Level Change Request

\* Subject

- Inquires that are related to the MAP-Stage Environments (non-production)
  - Ex. Connectivity, unanticipated simulation results, etc.
- Contact: [MarketSim@caiso.com](mailto:MarketSim@caiso.com)

# What Questions Do You Have?



Unmute yourself

or



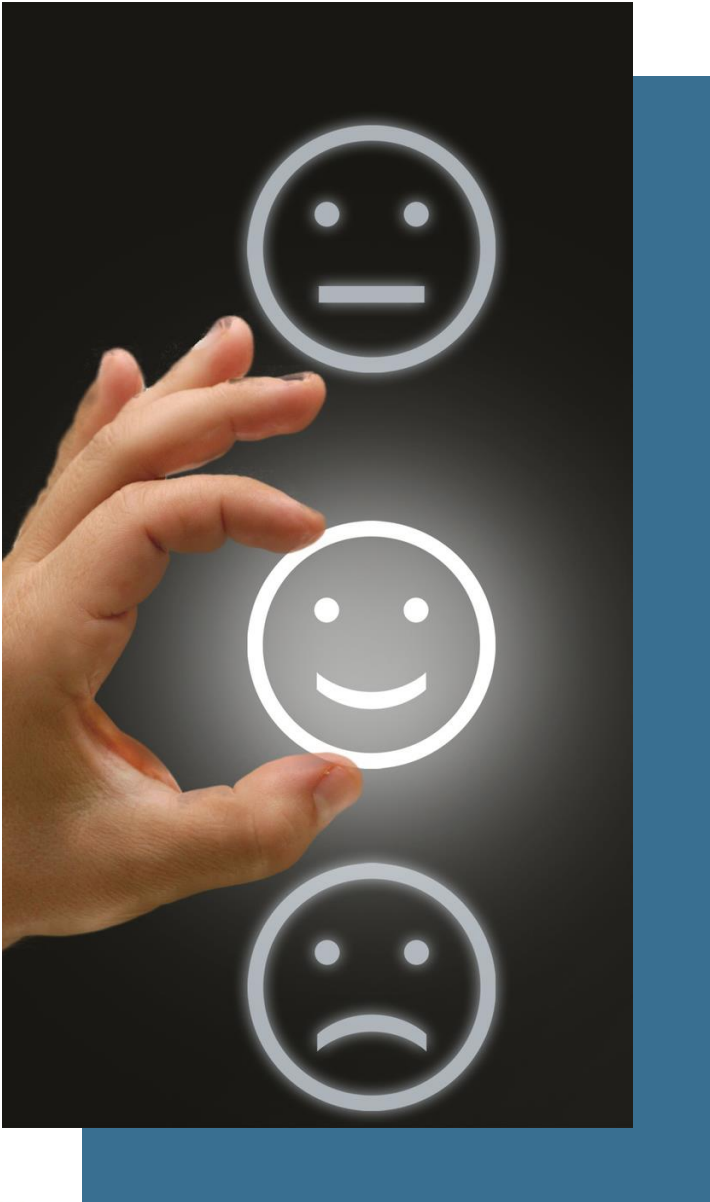
Raise your hand



# Wrap Up

## Summary, Q&A

- What's happening next.



## Tell us How we Did

Takes 3-5 minutes to complete

Helps us improve future training

Link: <https://www.surveymonkey.com/r/caisocoursesurvey>



# Thank you for your participation!

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For clarification on anything presented in this training, send an email to:  
[CustomerReadiness@caiso.com](mailto:CustomerReadiness@caiso.com)

For any other questions or stakeholder specific questions or concerns, please  
[submit a CIDI ticket.](#)



Additional Slides

# APPENDIX



# Reference Links

Business Practice Manual changes:  
[BPM Change Management](#)

Business Requirements Specification:  
<https://www.caiso.com/Documents/BusinessRequirementsSpecification-TransmissionServiceandMarketSchedulingPrioritiesPhase2.pdf>

Initiative webpage:  
<https://stakeholdercenter.caiso.com/StakeholderInitiatives/Transmission-service-and-market-scheduling-priorities>



# Reference Links

Market Simulation Structured Scenarios:

<https://www.caiso.com/Documents/MarketSimulationStructuredScenarios-Transmissionserviceandmarketschedulingpriorities-phase2.pdf>

Technical Specifications – located on the [ISO's Developer Site](#) which provides detailed descriptions of the API changes for:

- OASIS

Training Material: TSMSP1

<https://www.caiso.com/Documents/Presentation-Transmission-Service-Market-Scheduling-Priorities-Phase1-Training.pdf>

# Daily Submission Window Example

Calendar Date							
3/25/2024							
Daily Cycle	Published Period Start	Publish Period End	Request window open		Request window close		Daily results published
	2	7	7:00		12:00		13:00
3/25/2024	3/27/2024	4/1/2024	3/25/2024 7:00		3/25/2024 12:00		3/25/2024 13:00
3/26/2024	3/28/2024	4/2/2024	3/26/2024 7:00		3/26/2024 12:00		3/26/2024 13:00
3/27/2024	3/29/2024	4/3/2024	3/27/2024 7:00		3/27/2024 12:00		3/27/2024 13:00
3/28/2024	3/30/2024	4/4/2024	3/28/2024 7:00		3/28/2024 12:00		3/28/2024 13:00
3/29/2024	3/31/2024	4/5/2024	3/29/2024 7:00		3/29/2024 12:00		3/29/2024 13:00
3/30/2024	4/1/2024	4/6/2024	3/30/2024 7:00		3/30/2024 12:00		3/30/2024 13:00
3/31/2024	4/2/2024	4/7/2024	3/31/2024 7:00		3/31/2024 12:00		3/31/2024 13:00
4/1/2024	4/3/2024	4/8/2024	4/1/2024 7:00		4/1/2024 12:00		4/1/2024 13:00
4/2/2024	4/4/2024	4/9/2024	4/2/2024 7:00		4/2/2024 12:00		4/2/2024 13:00
4/3/2024	4/5/2024	4/10/2024	4/3/2024 7:00		4/3/2024 12:00		4/3/2024 13:00
4/4/2024	4/6/2024	4/11/2024	4/4/2024 7:00		4/4/2024 12:00		4/4/2024 13:00
4/5/2024	4/7/2024	4/12/2024	4/5/2024 7:00		4/5/2024 12:00		4/5/2024 13:00
4/6/2024	4/8/2024	4/13/2024	4/6/2024 7:00		4/6/2024 12:00		4/6/2024 13:00
4/7/2024	4/9/2024	4/14/2024	4/7/2024 7:00		4/7/2024 12:00		4/7/2024 13:00
4/8/2024	4/10/2024	4/15/2024	4/8/2024 7:00		4/8/2024 12:00		4/8/2024 13:00

# Clicking Pro-Rata and/or Partial

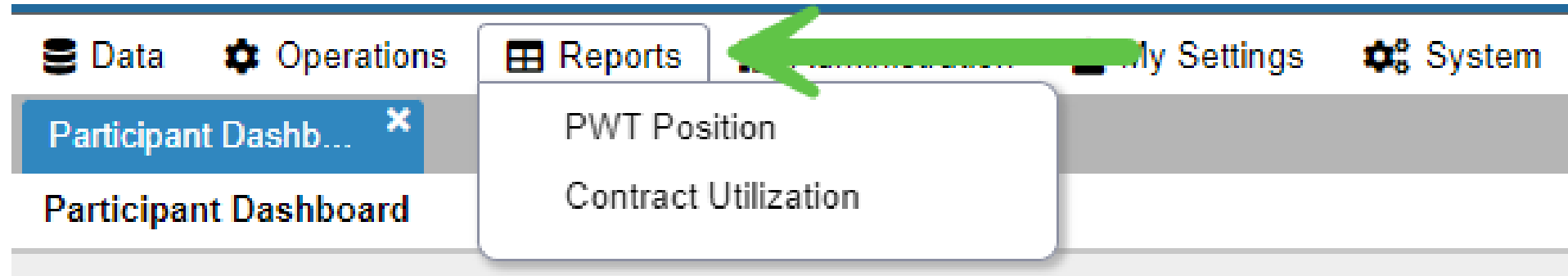
## PRO-RATA

- Yes: Requests can be awarded up to the requested amount for the evaluation period (subset of MWs)**
- No: Requests must be awarded for the full amount for the evaluation period**

## PARTIAL

- Yes: Requests can be awarded for each period included in the request duration (subset of months)**
- No: Requests must be awarded the same amount for all periods of the request**

# New webWheel Reports in Detail



**PWT Position** provides insight to PWT requests:

- Participant, Direction & Intertie
- Contract Capacity (MW)
- Requested (MW)
- Awarded (MW)
- Remaining (MW)
- Released (MW)

**Contract Utilization** provides insight on contracts:

- Contract name, Participant & Product
- Period Start/End
- Profile
- Submission Window
- PWT Request ID
- Status
- PWT Position MW details

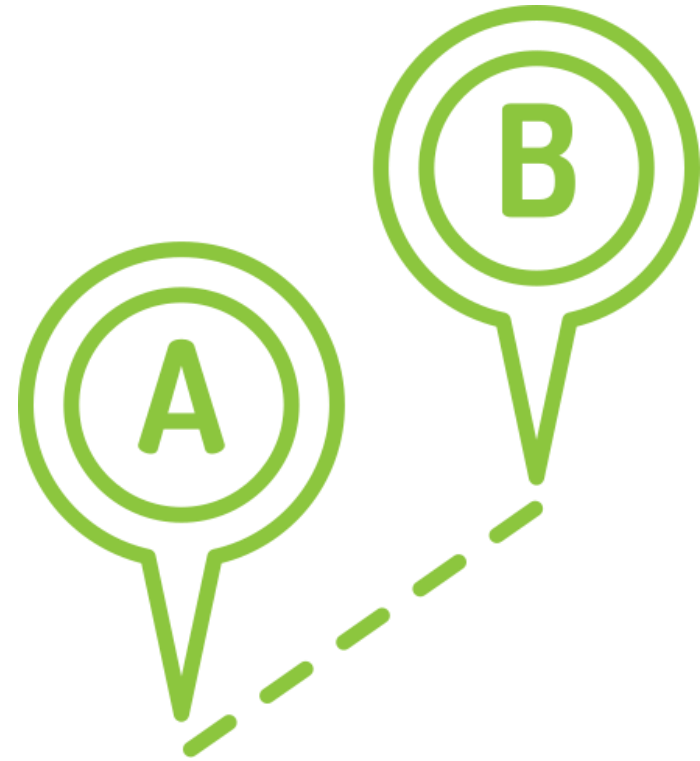
## SIBR Example of Export/Import

- There can be a one to many association for Export to Import with a PWT position MW. The Export and Import together per hour in the record are unique.
  - *ExportA* with *ImportB* for 45MW
  - *ExportA* with *ImportC* for 25MW
  - *ExportB* with *ImportA* for 30MW
  - *ExportC* with *ImportB* for 10MW
- There can only be one counter resource per Wheeling Transaction for the trading hour.
- *ExportA* can use either *ImportB* or *ImportC* but not both for a trade hour.

## Let's Walk Through Some Examples Together


An entity registers an **Importing** contract at Point A and an **Exporting** contract at Point B.

There are a few scenarios that could occur with their settlement statements.





# Example – Entity usage is less than the awarded PWT capacity



Monthly Awards: 100 MW  
Daily Awards: 20 MW  
Total Awarded MWs: 120 MW  
Schedule: 80 MWs  
*(did not need 40 of the awarded MWs)*


## WAC Charge

120 MW

**\*New requirement that WAC is charged against wheeling-through capacity, if its schedule is less**

WAC – Wheeling Access Charge

# Example – Entity usage is greater than the awarded PWT capacity



Monthly Awards: 100 MW  
Daily Awards: 20 MW  
Total Awarded MWs: 120 MW  
Schedule: 150 MW  
*(needed an additional 30MWs)*

## WAC Charge

150 MW

**\*It is a current practice that WAC is charged against wheeling-through schedules**

WAC – Wheeling Access Charge

# CGPCWHEELExportQuantity Document

- **Original ATC Transaction:** BAHourlyATCReservationIntertieQty
- **Resale:** BAHourlyATCReservationResaleIntertieQty
- WheelExportExcludingPWTResaleQuantity
  - This covers all original export transactions and calculations
  - The PWT transaction is nested within
  - This formula ensures that the resale quantity will not be included
- WheelExportPWTResaleQuantity
  - This is just for the resale

To review this document: [Release Planning](#) >> Summer 2024 settlements release technical documents >>  
Transmission service and market scheduling priorities phase 2

# Example of downloading ATC for PWT for the Day and Month

## DAY EXAMPLE

If a user wants to download a file for today at 11:30am, it would include

- Current Day
- Binding day
- Remaining 6 days (not binding)

Each day will have its own file that mirrors the UI report









## MONTH EXAMPLE

If a user wants to download a file for today at 11:30am, it would include

- Current Month
- Binding months
- Remaining 11 months (not binding)

Each month will have its own file that mirrors the UI report

## Getting to know webWheel table features

-  New contract
-  Filter results
-  Column configuration & resetting filters
-  Font display
-  Display views
-  Print
-  Download (xlsx or CSV)
-  Refresh