

# Settlement User Group



December 9, 2020

10:00 a.m. – 11:00 a.m. (Pacific Time)

Web Conference Information	Conference Call Information
Web Address: https://caiso.webex.com/meet/settlementuser	Dial-in Number: (866) 528-2256
Meeting Number: 961 854 046 Audio connection instructions will be available after	International Dial-in: (216) 706-7052
connecting to the web conference. When prompted, select "Call me" and enter your phone number you will use during the call. You will be called by the conference shortly.	Access Code: 673 78 64

Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publically available on the ISO web page for a limited time following the meeting. The recording, and any related transcriptions, should not be reprinted without the ISO's permission. Hyperlinks in blue in PDF copy.

The recording will be posted on our website and be available for a short period of time until Dec 23, 2020.

Please mute your phone and do not put it on hold while the discussion is going on in order to eliminate background

noise. There will be an opportunity to ask questions after each topic, but before asking your question,

please state your name and affiliation. Thank you.



ISO Public



## Settlement User Group Agenda

Wednesday, December 9, 2020

10:00 a.m. – 11:00 a.m. (Pacific Time)

Time	Торіс	Presenter
<ul> <li>10:00 – 10:05</li> </ul>	<ul> <li>Welcome and Introduction</li> </ul>	Tyler DuBeshter
■ 10:05 – 11:00	<ul> <li>Settlements</li> </ul>	
	<ul> <li>RC Services</li> </ul>	
	Q4 2020 - Settlement Release Milestones	
	<ul> <li>Winter Market Simulation Settlement Updates</li> </ul>	Assad Al- Baijat
	PRR and BPM Update	Brenda Corona
	<ul> <li>Customer Readiness 2021 Training</li> </ul>	<ul> <li>Cindy Hinman</li> </ul>



## RC Services update

#### RC Services

- Informational Statement timeline:
  - COMPLETED: Customers external to CAISO BAA submit 2019 NEL/NG data in MRI-S between
    - 9/3/2020 9/30/2020
  - COMPLETED: Informational Statement will publish 10/30/2020
  - COMPLETED: Customer review and re-submit 2019 data (if needed) by 11/30/2020
- Statement and Invoice published on 01/04/2021
  - Payment is due by 02/03/2021
    - Note: there are some due date exceptions per contract
- RC West Payment Calendar: <a href="http://www.caiso.com/Documents/RCWestAnnualPaymentsCalendar.pdf">http://www.caiso.com/Documents/RCWestAnnualPaymentsCalendar.pdf</a>

#### HANA Services

• No updates



## Winter/Q4 2020 – Settlement Release Milestones

- Release Scope:
  - Day Ahead Nodal (NPM project)
  - Intertie Deviation Settlement (IDS)
  - EIM Enhancement: Symmetrical Wheeling
  - Production defects detailed in release component summary
- 3<sup>rd</sup> draft configuration output file (pre market sim) posted 10/9
- 4<sup>th</sup> draft configuration output file posted 10/29
  - IDS calc granularity change from MW to MWh
- Additional unplanned draft configuration output files posted 11/19 + 11/23
  - 11/19 change for IDS: re-activate a previously terminated energy flag and adjust two formulas in CC 6456:
    - the 15 min deviation quantity to ensure 0 output when transmission profile > HASP and
    - the final accept quantity to consider auto acceptance, which defaults to HASP award
  - 11/23 change for Sym Wheeling: defect correction impacting CCs 6985 & 69850 to ensure accurate settlement of base ETSR marginal loss amounts
- **Market sim in progress:** please stay informed by participating in both:
  - <u>Market Simulation web conferences</u> each Monday & Thursday 2-3pm
  - <u>Release User Group (RUG)</u> web conference, every other Tuesday 10-11am
- Pre-prod configuration output file + release artifacts to post **one day delay to 12/10**
- Production deployment one day delay to 12/17



## Independent Market Simulation

- Visit CAISO.com at Stay Informed>Release Planning>Independent 2020
- Upcoming meeting will be on Thursday, December 10 at 2pm.

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#### Web Conference Information

Web address: <u>https://caiso.webex.com/meet/MarketSim</u> Meeting number: 962 067 710

#### Conference Call Information (Will change on December 18)

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

**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





California ISO

ISO Internal Use

## Winter Market Simulation Settlements Updates

Market Sim Calendar Link

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			T+9B	T+9B	T+70B	T+70B	
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## Winter Market Simulation Settlements Updates (cont.) Market Sim Calendar Link

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## Winter Market Simulation Settlements Updates (cont.)

Market Sim Calendar Link

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## Winter Market Simulation Settlements Updates

- Day Ahead Nodal Pricing Model
- Timeline: October 6 November 13 (CMRI)
- **Structured**: October 20 -October 22
- Structured Scenarios document -<u>http://www.caiso.com/Documents/NPM\_structured\_mktsim-</u> <u>Reviewed.pdf</u>
- Intertie Deviation Settlement
- Timeline: December 1-December 18
- Structured: December 1 (8AM- 9AM and 3:30PM onwards)
- Please use <u>https://demo.caiso.tag.oati.com/</u> to submit tags in Map Stage environment
- Structured Scenarios document http://www.caiso.com/Documents/MarketSimulationScenariosIntertieDeviationSettlement.pdf

### Symmetrical Wheeling

- **Timeline:** November 17 December 18
- Unstructured Scenario <u>–</u> December 1
- <u>http://www.caiso.com/Documents/MarketSimulationScenariosSymmetricalSettlementForWheelingThroughEimBAAs.pdf</u>

## EIM Enhancements 2020

- Timeline December 15- December 29 (CMRI)
- BAAOP & BSAP currently available in MAP- Stage
- Unstructured Scenarios document

http://caiso.com/documents/marketsimulationscenariosenergyimbalancemarket2020enhancements.pdf



California ISO



## PRR and BPM Updates

Business Practice Manual Proposed Revision Request Tracking Log

PRR	Title		Status for all
1292	To support the Intertie Deviation Settlement initiative, configuration revisions to incentivize acceptance and delivery of intertie market awards to reduce adverse impact to grid stability and market pricing.	✓	Market notice was sent 10/30/20
1293	To support the anticipated changes stemming from the EIM Enhancements 2020 initiative, configuration revisions to provide symmetrical settlement for wheeling through EIM BAAs by settling all Base ETSR schedule deviations at an EIM BAA intertie at an SP-Tie LMP.	✓ ✓ ✓	Initial comments expired on 11/13/20 Recommendation comment period expires on 12/10/20 BPM Meeting on 12/15 at 11 a.m.
1294	To support the Day-ahead nodal pricing model (NPM) initiative, configuration revisions to provide advisory settlement for NPM resources and SCs that participate in the NPM which ensure no commingling with financially binding settlement.		



## PRR and BPM Updates (con't)

PRR	Title		Status for all
1295	To support the slow demand response enhancement, documentation changes to include business rule for comparing resource locational marginal price to day ahead bid price for slow demand response resources in cases where exceptional dispatch type of non TModel Exceptional Dispatch Type, which	✓	Market notice was sent 10/30/20
	result to a document only change and utilizing current active settlement configuration	✓	Initial comments expired on
1296	Retroactive configuration adjustment to RMR capacity payments to ensure that RUC commitment costs are considered in the calculation for the combined RUC and RTM excess revenues.	~	11/13/20 Recommendation comment period expires on
1297	To support the excess behind the meter production initiative, configuration enhancements to account for new energy measurement type excess behind the meter production and to settle charges to non-participating load.	✓	12/10/20 BPM Meeting on 12/15 at 11 a.m.
1298	Updated settlement and billing business practice manual for market settlements timeline transformation initiative		



## PRR and BPM Updates (con't)

PRR	Title		Status for all
1299	Retroactive configuration correction to the Spin/Non-Spin No Pay quantity calculation that ensures accurate accounting for fast start units deemed offline in real time.	<b>√</b>	Market notice was sent 10/30/20
1300	Updated charge code 6045 over and under scheduling energy imbalance market settlement in the business rules to align with incremental price is applied for under scheduling with current configuration	v √	Initial comments expired on 11/13/20 Recommendation comment period expires on
1306	Updated BPM configuration guides for enforcement protocol charge group charge code 1591, 1592, and 1593 to accommodate charge code 1593 associated with daily statements	✓	12/10/20 BPM Meeting on 12/15 at 11 a.m.
1307	Updated multiple BPM configuration guides to accommodate updating the procedure that documents the steps for submitting the transmission revenue requirement detail to the CAISO required for updating transmission access charge rates	~	<u>Market Notice for</u> <u>PRR 1306, 1307,</u> <u>1308</u> was sent 11/24
1308	To support energy imbalance market enhancements 2020, specifically symmetrical wheeling configuration changes to real time marginal losses offset energy imbalance market		



## **ISO Computer Based Training Programs**

Visit caiso.com **Learning Center** web page to access our training calendar, register for courses and find other informational resources: <u>http://www.caiso.com/participate/Pages/LearningCenter/default.aspx</u>

Computer Based Train	ing – Settlements	\	Webinars		
There are more than <u>30</u> comp covering:	outer based training modules on the ISO website		Welcome to the ISO (Webinar)	January 14, 2021	
RC Customer Settlements	http://www.caiso.com/CBT/RC-Settlements/index.html		Intro to ISO	March 2-3, 2021	
Energy Settlements Validation Practice	http://www.caiso.com/CBT/EnergySettlementsValidation/story.html	\	Workshop (Virtual workshop)	(9am-12pm)	
Settlement Validation Practice	http://www.caiso.com/CBT/Settlements%20Validation%20Practice /story_html5.html		Market	March 9-10, 2021	
Commitment Costs	http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html		Transactions (Virtual	(9am-12pm)	
Settlements foundational concepts (EIM)	https://www.westerneim.com/CBT/Settlements%20Foundational %20Concepts/Settlements-FoundationalConcepts.html		workshop)		
Metering Overview	http://www.caiso.com/CBT/MeteringOverview/MeteringOverview. html		ISO Settlements (Virtual	March 16-17, 2021 (9am-12pm)	
Settlements Process	http://www.caiso.com/CBT/SettlementsProcess/story_html5.html		workshop)		
Market Pricing - New	http://www.caiso.com/CBT/Market-Pricing/story.html				
New initiatives training course of Settlements trainings	n the learning center web page and retooling			The second second	

Settlements trainings



CustomerReadiness@caiso.com Page 14

Recent Tweets 🔰



@ISOSettlements @isosettlements · Dec 7 Initial comments for proposed revision requests 1306, 1307 and 1308 are due 12/10/20, for Business Practice Manuals Change Management review. bit.ly/32a1MWJ

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@ISOSettlements @isosettlements · Dec 7 • Recommendation comments for proposed revision requests 1292-1300 are due 12/10/20, for Business Practice Manuals Change Management review. bit.ly/32a1MWJ



@ISOSettlements @isosettlements · Dec 4

The Market simulation conference call has posted the presentations from the 11/30 and 12/3 meetings. bit.ly/3hXrPVU



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#### @ISOSettlements @isosettlements · Dec 4

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The @California\_ISO will perform maintenance on MAP Stage's Open Access Same-Time Information System User Interface/Application Programming Interface will be unavailable 12/7 through 12/8.



#### @ISOSettlements @isosettlements · Dec 2

1J

The 2021 Annual Congestion Revenue Rights auction awards the T+12B recalculation statement instead of the T+3B initial statement for trade day 11/11/20. If you have any questions, please send to crrdata@caiso.com or settlementuser@caiso.com. Learn more: buff.ly/2EuS0Vr







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## Upcoming WebEx Update

New dial-in phone numbers will be used at the December 23 meeting.



**No change** to WebEx URL: <u>https://caiso.webex.com/meet/settlementuser</u>

The updated web conference participation information for the 12/23/20 starting 12/18 you will need to use new audio dial-in number this includes access codes.

#### **New Dial In information**

Dial-in Number: (682)-268-6591

Toll- Free Dial-in Number: (844)-517-1271





#### Settlement User Group Calendar 2021 2021

Market Services

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on www.caiso.com and follow us on Twitter @ISOSettlements

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Meeting

Agenda posted

Holiday

**Follow** us on Twitter @ISOSettlements for our latest updates

## Settlement User Group Calendar

#### 2020

Market Services

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on www.caiso.com.

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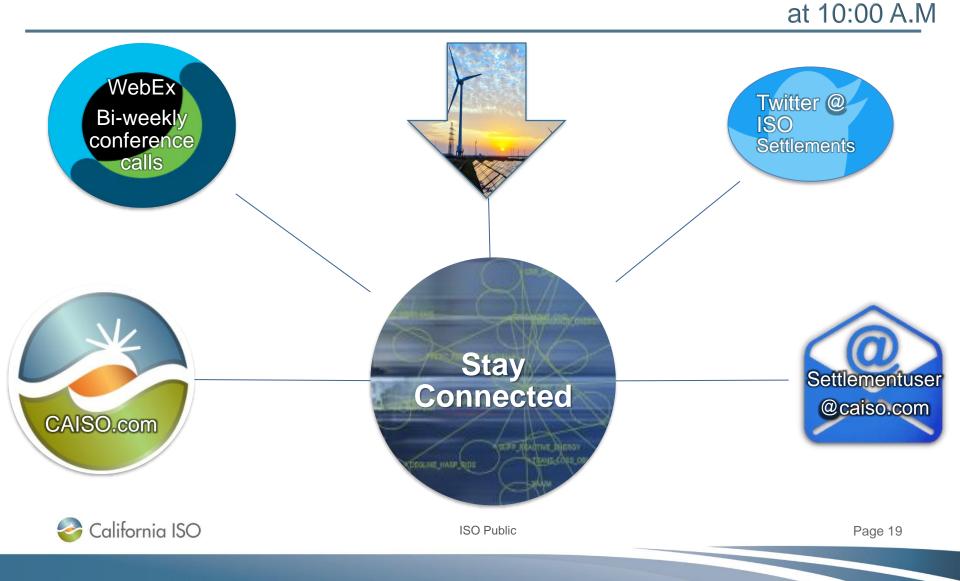




California ISO

**1 MEETING LEFT THIS YEAR** 

# Next SUG: December 23, 2020



## Settlement References

- Settlement User Group Calendar 2021
- Release Training Information for Settlements
- Knowledge Articles
- ISO Settlements Twitter Page
- Ways to Participate in Settlements



## Settlement User Group Calendar

Market Services

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on www.caiso.com and follow us on Twitter @ISOSettlements

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Meeting

Agenda posted

Holiday

Follow us on Twitter @ISOSettlements for our latest updates



## Release Training Information for Settlements

Project Presentation Links
Hybrid Resources Phase 1
Intertie Deviation Settlement
Excess Behind the Meter Production
Market Settlement Timeline Transformation
<u>FERC 841 – Requested Adjustments</u>
Energy Storage and Distributed Energy Resources 3B
Commitment Costs and Default Energy Bid Enhancements

Access Video to trainings on <u>http://www.caiso.com/participate/Pages/LearningCenter/default.aspx</u>



Training calendar



## **Knowledge Articles**

CAISO has posted **Knowledge Articles** for FAQs in CIDI.

To access the articles in CIDI, you either:

**Option 1**: Type in the keyword "**Identify**" in the search field to pull up the article, or

**Option 2:** Click on the **Knowledge Articles** tab, and then click the **Settlements and Metering** category link to pull up a list of the Settlements related articles.

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	Q. Identifying		
Search Res	ults Knowledge		
Search Res	ults Knowledge 5+ Results - Sorted by Rel	levance 💌	View More
	5+ Results - Sorted by Rel	EIM manual dispatches from ISO systems	View More

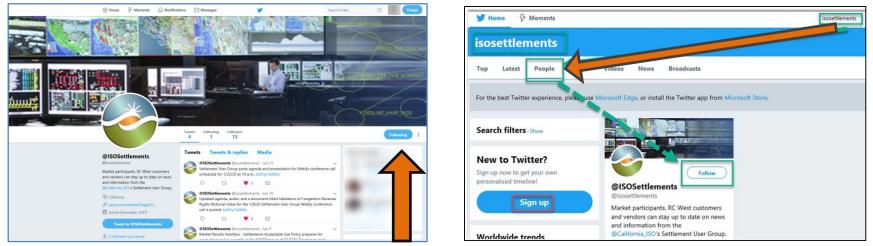
#### **Posted Knowledge Articles to date:**

- RC rate location
- RC Informational Statement
- RC services charge
- 2019 prorated RC charge
- Payment calendar
- ED-DPMIN
- After-the-Fact EIM Manual Dispatches from ISO systems
- Validate Mitigated prices in DA, RTPD (FMM) and RTD -New
- Calculation of meter data for TG resources –*New*
- Pricing node (Pnode) price used for CRR Settlement–*New*



## **ISO Settlements Twitter**

- Settlement related updates
- Market sim updates
- Note: Will not replace any existing media communications
- Please take the opportunity to follow <u>@ISOSettlements on Twitter</u> by downloading the Twitter application to **any mobile device**
- Twitter feed can be accessed on **any web browser**
- No account required to view the Twitter feed and posts
- Save twitter page as a Favorite on your tab



ISO Public

## Ways to participate in settlements

- ISO Settlements Twitter Page
  - <u>https://twitter.com/isosettlements</u>
- Visit the Settlements page
  - <u>http://www.caiso.com/market/Pages/Settlements/Default.aspx</u>
- Attend web conference meetings
  - Settlement User Group (SUG) bi-weekly meetings
    - Release User Group
    - Market Sim Conference Calls
    - Initiative status with settlement updates
    - <u>http://www.caiso.com/StakeholderProcesses/</u>
    - System change with settlement updates on independent releases
- BPM PRR Change Management monthly web meeting
  - Settlement and Billing BPM status updates
  - <u>http://bpmcm.caiso.com/Pages/default.aspx</u>
  - <u>http://www.caiso.com/rules/Pages/BusinessPracticeManuals/Default.aspx</u>
  - <u>http://www.caiso.com/Documents/ISO-AcronymList.pdf</u>



# Settlement User Group

## Thank you for participating in our call





**ISO** Public