



California ISO

# Settlement User Group



March 17, 2021

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

Web Conference Information	Conference Call Information
<p>Web Address: <a href="https://caiso.webex.com/meet/settlementuser">https://caiso.webex.com/meet/settlementuser</a></p> <p>Meeting Number: 961 854 046</p> <p>Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter your phone number you will use during the call.</p>	<p>US Toll Free: 1-844-517-1271</p> <p>US Toll : +1- 682-268-6591</p> <p>Access Code: 961 854 046</p>

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 March 31, 2021.

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.



mute

ISO Public



# Settlement User Group Agenda



Wednesday, March 17, 2020

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

Time	Topic	Presenter
▪ 10:00 – 10:02	▪ Welcome and Introduction	▪ Tyler DuBeshter
▪ 10:02 – 11:00	▪ Settlements <ul style="list-style-type: none"><li data-bbox="455 622 1406 658">▪ Spring/Q1 2021 – Settlement Release Milestones</li><li data-bbox="455 694 900 729">▪ PRR and BPM update</li><li data-bbox="455 765 1228 801">▪ Market Simulation Spring 2021 Update</li><li data-bbox="455 836 1164 872">▪ Customer Readiness 2021 Training</li><li data-bbox="455 908 778 943">▪ Dispute Topics</li></ul>	▪ Elizabeth Caldwell ▪ Brenda Corona ▪ Assad Al- Baijat ▪ Cynthia Hinman ▪ Uma Ramanathan

# Spring/Q1 2021 Settlement Release

- Release scope:
  - Projects:
    - Hybrid Resources Phase 1b Settlements
    - Real Time Settlement Review:
      - BCR transfer amount calculation change aligned with EIM Base Schedule Submission Deadline initiative
  - Production defects detailed in release component summary
    - **Two additions resulting from UAT/market sim**
- 1st draft tech docs + config output file + release component summary posted – **1/19**
- 2nd draft config output file + updated release component summary posted – **2/24**
- 3rd draft config output file + updated release component summary to post - 3/17
- Market sim in progress
  - Conference calls are bi-weekly, Monday + Thursday
  - Stay current thru [Release User Group](#) (RUG), every other Tuesday 10-11am
  - Next web conference on 3/23
- Pre-prod configuration output file + release artifacts to post – **4/21**
- Anticipated prod deployment – **4/28**

# PRR and BPM Updates

The BPM has also changed to reflect this correction and the emergency PRR is already available via the [ISO BPM Change Management application](#)

PRR	Title	Status
1320	Update MSS Deviation Penalty Quantity Precalculation BPM to resolve Excess Behind the Meter Production (EBTMP) issue for load following metered subsystems	<ul style="list-style-type: none"> <li>Published in the <a href="#">BPM Library</a></li> </ul>
1322	Configuration adjustment for DA Nodal defect in charge code 4515 GMC Bid Transaction fee to re-enable the bid segment count formulas	<ul style="list-style-type: none"> <li>Initial comment period expired on 3/16</li> </ul>
1323	Configuration changes to consider bid option flag for resources that switch between 15 minute and hourly bid option within the same trade date	<ul style="list-style-type: none"> <li>Recommendation comment will be posted 3/26</li> <li>PRRs will be discussed during the March and April BPM meetings</li> <li>Published in the <a href="#">BPM change management website</a></li> </ul>

# PRR and BPM Updates (con't)

PRR	Title	Status for all
<b>1328</b>	To support the Hybrid Resource Phase 1b project extension, configuration revision to retroactively charge Hybrid Resources a forecasting fee.*	<ul style="list-style-type: none"> <li>Initial comment period expired on 3/16</li> <li>Recommendation comment will be posted 3/26</li> <li>Market Notice <a href="#">Posted</a></li> <li>PRRs will be discussed during the March and April BPM meetings</li> </ul>
<b>1329</b>	To support the Real Time Settlement Review - Phase 1 project, configuration revisions to allow for BCR Transfer adjustments, settling the base ETSR at unique pricing location LMP, and the elimination of the option for EIM entities to not settle Base ETSRs schedule deviations. *	
1330	Configuration change to spilt allocation of any unallocated RAAIM funds leftover at year-end between generic and flexible RA and CPM types.	
1331	Configuration change to enhance dynamic resources logical meter calculation (LMC) to use hourly-integrated tag values for the trade hour to derive the logical meter value.	
1332	Configuration change adjusting the intertie attribute under Day Ahead Energy, Congestion and Loss charge code 6011 to enable unique price on Hourly Day Ahead Nodal MCL Price.	
1333	Documentation only change to clarify mapping rules for Resource Channel 4 Generator Meter Quantity for 'DDR' and 'LESR' to net the Gen measurement type with Load measurement type.	

**\*Market Simulation for these projects only**

[Business Practice Manual Proposed Revision Request Tracking Log](#)

# PRR and BPM Updates (con't)

PRR	Title	Status
1335	Update CC 7020 RMR Capacity Payment BPM to clawback excess revenue when RMR designation is for System TAC Area	<ul style="list-style-type: none"><li>• Initial comment period expires on 4/13</li><li>• PRRs will be discussed during the April and May BPM meetings</li></ul>

# Market Simulation Spring 2021 Updates

- Settlement Trade dates are Tuesdays and Thursdays
- Any issues related to the Market Participant Portal, please submit a CIDI ticket with the field "functional environment" = "Market Simulation Spring 2021"
- [Market Simulation Settlements Calendar](#)
- [Market Simulation Plan](#)

March						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

April						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

## Web Conference Information

Web address: <https://caiso.webex.com/meet/MarketSim>,

Meeting number: 962 067 710

## Conference Call Information

- Dial-in Number: 844-517-1271 (Toll Free)
- International Dial-in: 682-268-6591
- Access Code: 962 067 710

# Market Simulation Settlements Updates



## Spring 2021 Release Calendar (MAP STAGE)

Mar 8, 2021 through April 09, 2021

Calendar Day	Day	CMRI T+1B	Submit Meter Data by T+3B 10:00 AM for Initial	Publish Initial Statement T+6B	Submit Meter Data by T+6B 18:00 for Recalc	Publish Recalc Statement T+9B	Publish Market Invoice
				T+9B		T+70B	
08-Mar-21	Monday						
09-Mar-21	Tuesday						
10-Mar-21	Wednesday	9-Mar					
11-Mar-21	Thursday						
12-Mar-21	Friday	11-Mar	9-Mar				
13-Mar-21	Saturday						
14-Mar-21	Sunday						
15-Mar-21	Monday						
16-Mar-21	Tuesday		11-Mar				
17-Mar-21	Wednesday	16-Mar		9-Mar	9-Mar		
18-Mar-21	Thursday						
19-Mar-21	Friday	18-Mar	16-Mar	11-Mar	11-Mar		
20-Mar-21	Saturday						
21-Mar-21	Sunday						
22-Mar-21	Monday			Monthly Initial 09-Mar - 11-Mar		9-Mar	
23-Mar-21	Tuesday		18-Mar				Daily Initial 09-Mar; 11-Mar Monthly Initial 09-Mar - 11-Mar
24-Mar-21	Wednesday	23-Mar		16-Mar	16-Mar	11-Mar	
25-Mar-21	Thursday					Monthly Recalc 09-Mar - 11-	
26-Mar-21	Friday	25-Mar	23-Mar	18-Mar	18-Mar		
27-Mar-21	Saturday						
28-Mar-21	Sunday						

# Market Simulation Settlements Updates (con't)

Calendar Day	Day	CMRI T+1B	Submit Meter Data by T+3B 10:00 AM for Initial	Publish Initial Statement T+6B	Submit Meter Data by T+6B 18:00 for Recalc	Publish Recalc Statement T+9B	Publish Market Invoice
				T+9B		T+70B	
27-Mar-21	Saturday						
28-Mar-21	Sunday						
29-Mar-21	Monday			Monthly Initial 16-Mar - 18-Mar		16-Mar	Daily Initial 16-Mar; 18-Mar Monthly Initial 16-Mar - 18-Mar  Daily Recalc 09-Mar; 11-Mar Monthly Recalc 09-Mar - 11-Mar
30-Mar-21	Tuesday		25-Mar				
31-Mar-21	Wednesday			23-Mar	23-Mar	18-Mar	
01-Apr-21	Thursday					Monthly Recalc 16-Mar - 18-	
02-Apr-21	Friday			25-Mar	25-Mar		
03-Apr-21	Saturday						
04-Apr-21	Sunday						
05-Apr-21	Monday			Monthly Initial 23-Mar - 25-Mar		23-Mar	Daily Initial 23-Mar; 25-Mar Monthly Initial 23-Mar - 25-Mar  Daily Recalc 16-Mar; 18-Mar Monthly Recalc 16-Mar - 18-Mar
06-Apr-21	Tuesday						
07-Apr-21	Wednesday					25-Mar	
08-Apr-21	Thursday					Monthly Recalc 23-Mar - 25-Mar	Daily Recalc 23-Mar; 25-Mar Monthly Recalc 23-Mar - 25-Mar
09-Apr-21	Friday						
10-Apr-21	Saturday						
11-Apr-21	Sunday						

# Settlement Corner

Upcoming Topics	Previous Topics	Published Knowledge Articles
<ul style="list-style-type: none"><li>• Summer Settlement Release Projects</li></ul>	<ul style="list-style-type: none"><li>• Storage- <a href="#">Link</a></li><li>• Bid Cost Recovery - <a href="#">Link</a></li><li>• FERC 841- requested adjustments – <a href="#">Link</a></li><li>• Renewable and energy storage - <a href="#">Link</a></li><li>• Fall Release Projects – <a href="#">Link</a></li><li>• Transportation electrification and micro grids <a href="#">Link</a></li><li>• Hybrid Resource Phase 1b - <a href="#">Link</a></li><li>• Real Time Settlement Review <a href="#">Link</a></li></ul>	<ul style="list-style-type: none"><li>• RC Informational Statement</li><li>• After-the-Fact EIM Manual Dispatches from ISO systems</li><li>• Validate Mitigated prices in DA, RTPD (FMM) and RTD</li><li>• Calculation of meter data for TG resources</li><li>• Energy Transfer System Resource (ETSR)</li><li>• Pricing node (Pnode) price used for CRR Settlement</li></ul>



topics to us at [twitter.com/isosettlements.com](https://twitter.com/isosettlements.com)

# ISO Computer Based Training Programs

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

## Computer Based Training – Settlements

There are more than [30](#) computer based training modules on the ISO website covering:

RC Settlements	<a href="http://www.caiso.com/CBT/RC-Settlements/rc-settlements.html#/">http://www.caiso.com/CBT/RC-Settlements/rc-settlements.html#/</a>
Energy Settlements Validation Practice	<a href="http://www.caiso.com/CBT/EnergySettlementsValidation/story.html">http://www.caiso.com/CBT/EnergySettlementsValidation/story.html</a>
Settlement Validation Practice	<a href="http://www.caiso.com/CBT/Settlements%20Validation%20Practice/story_html5.html">http://www.caiso.com/CBT/Settlements%20Validation%20Practice/story_html5.html</a>
Commitment Costs	<a href="http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html">http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html</a>
Settlements foundational concepts (EIM)	<a href="https://www.westerneim.com/CBT/Settlements%20Foundational%20Concepts/Settlements-FoundationalConcepts.html">https://www.westerneim.com/CBT/Settlements%20Foundational%20Concepts/Settlements-FoundationalConcepts.html</a>
Metering Overview	<a href="http://www.caiso.com/CBT/MeteringOverview/MeteringOverview.html">http://www.caiso.com/CBT/MeteringOverview/MeteringOverview.html</a>
Settlements Process	<a href="http://www.caiso.com/CBT/SettlementsProcess/story_html5.html">http://www.caiso.com/CBT/SettlementsProcess/story_html5.html</a>
Market Pricing	<a href="http://www.caiso.com/CBT/Market-Pricing/story.html">http://www.caiso.com/CBT/Market-Pricing/story.html</a>

New initiatives training course on the learning center web page and retooling Settlements trainings

## Training Courses and workshops

<b>Intro to ISO Workshop (Virtual workshop)</b>	June 8 - 9, 2021 (9am-12pm)
<b>Market Transactions (Virtual workshop)</b>	June 15 -16, 2021 (9am-12pm)
<b>ISO Settlements (Virtual workshop)</b>	June 22 - 23, 2021 (9am-12pm)



# Dispute Topics

## Market Services

# Intertie Deviation Settlement

CAISO has received disputes on the following issues regarding Intertie Deviation Settlement. We are sharing this information at this meeting since this affects all market participants

## **Issues:**

- 1) Delayed IDS activation of T-40 Tagging timeline for HB
- 2) Incorrect T-40 Tagging to Market for HB
- 3) Doubling of the Tag Quantity
- 4) Incorrect Final Tag Quantity between ITS-UI and Settlements
- 5) Reliability Curtailed MW
- 6) ADS Decline MW

# Intertie Deviation Settlement

## 1) Delayed IDS activation of T-40 Tagging timeline for HB:

T-40 tagging timeline functionality should have been changed in ITS effective from Trade Date 2/1/2021. It got delayed to 2/8/2021 due to internal miscommunication.

Impact - Due to the activation delay, for Hourly Block (HB) resources, Real-Time market received the ADS Accepted value instead of the Minimum of ADS Accepted value and T-40 Tag Transmission profile value. Due to this, HB's First and Second FMM schedules may have been impacted in intervals where the Tag Transmission is less than the HASP schedule and ADS Accepted MW.

It will affect both Self-Schedule Hourly Block (SSHB) and Economic Bid Hourly Block (EBHB) import and export resources.

# Intertie Deviation Settlement

Illustrating the issue using an example for Issue 1 from **2/1/2021 to 2/7/2021**:

Unit A (SSHB)

DA Schedule = 0MW

Unit has RT Bids

HASP Schedule = 100MW

ADS Accepted MW = 100MW

**TP Tag = 0MW**

EP Tag = 0MW

Current Fifteen-Minute Binding Awards = 100, 100, 0, 0MW

**Correct** Fifteen-Minute Binding Awards = 0, 0, 0 and 0MW

Potential Impacted Charge Code = Imbalance Energy Settlement – a) FMM-IIE Settlement (CC6460) and RTD-IIE Settlement (CC6470).

# Intertie Deviation Settlement

## 2) Incorrect T-40 Tagging to Market for HB:

ITS sent out the higher of ADS accepted MW and T-40 Transmission Profile as the T-40 TP to market. Issue is fixed at noon on 3/15.

Impact - Due to the incorrect input, market actually used the following to determine fifteen-minute dispatches for Hourly Block (HB) resources.

- $\text{Min}(\text{HASP schedule}, \text{Max}(\text{ADS Accepted value}, \text{T-40 Tag TP}))$ .

### **Market should have been used**

- **Min (HASP schedule, ADS Accepted MW, T-40 Tag TP)**

When the Tag Transmission Profile is less than the HASP schedule and ADS Accepted MW, HB's First and Second FMM schedules may have been impacted in intervals.

It will affect both Self-Schedule Hourly Block (SSHB) and Economic Bid Hourly Block (EBHB) import and export resources.

# Intertie Deviation Settlement

Illustrating the issue using an example for Issue 2 from **2/8 through 3/15/2021**:

Unit A (SSHB)

DA Schedule = 125MW

Unit has RT Bids

HASP Schedule = 138MW

ADS Accepted MW = 138MW

Incorrect TP Tag to Market = 138MW

**Correct TP tag to Market = 125MW**

EP Tag = 125MW

Current Fifteen-Minute Binding Awards = 138, 138, 125 and 125MW

**Correct** Fifteen-Minute Binding Awards = 125, 125, 125 and 125MW

Potential Impacted Charge Code = Imbalance Energy Settlement – a) FMM-IIE Settlement (CC6460) and RTD-IIE Settlement (CC6470).

# Intertie Deviation Settlement

We have to deny the disputes since CAISO cannot make corrections for the FMM schedules. Since a re-run of the market after the fact would result in different economic resource awards/dispatches, re-running of the RTM solution is not feasible. Similarly, after the fact modification of Market results is also infeasible, because the Settlement of selectively modified market results would have unfavorable impacts on other Scheduling Coordinators.

This issue will not affect Intertie Deviation Settlement (CC6456) since, Intertie Deviation Settlement for SSHB and EEHB is calculated as follows:

# Intertie Deviation Settlement

## Hourly Block (HB) Tie Deviation Calculation

We take the absolute value of the resource HASP Schedule and subtract the Final Energy Tag and the Reliability Curtailed quantities.

- **Formula = Abs [HASP Schedule – (After-the-fact Tag of Energy Profile (EP) PLUS Reliability Curtailed MW)].**

## Undelivered ADS Accept Additional Penalty Calculation

We take the absolute value of the HASP Accepted MW (from ADS) and subtract the final energy tag and the reliability curtailed quantities.

- **Formula = Abs [ADS Accepted MW – (After-the-fact Tag of Energy Profile (EP) PLUS Reliability Curtailed MW)].**

As you can see above, TP Tag profile is not included in the Intertie Deviation Settlement in CC6456.

# Intertie Deviation Settlement

## Summary

Issue 1 and 2):

- a) ITS sent out incorrect information to Real-Time Market.
- b) If the T-40 TP Tag is lower than the HASP schedule and ADS Accepted MW, FMM schedules (only to the first 2 FMM Intervals) were higher than they should have been.
- c) Both issues impact Imbalance Energy Settlement- FMM-IIE Settlement (CC6460) and RTD-IIE Settlement (CC6470).

**Neither** issues impact IDS penalty charges (CC6456 and CC6458) since FMM schedules are not part of the settlement calculations for these two charge codes.

# Intertie Deviation Settlement

## 3) Doubling of the Tag Quantity:

Settlements received double tag quantity from ITS. The root cause was the contract usage MW quantity got doubled while creating the payload for Settlements.

Impacted Resources = Wheeling Intertie Resources with contracts  
Direct Impacted Charge Codes = RTD-IIE Settlement (CC6470)  
and Intertie Deviation Settlement (CC6456)

Status Update: CAISO has **fixed** this issue effective from Trade Date 2/12/2021.

Corrections for Trade Dates from 2/1/2021 through 2/11/2021 will be reflected on T+70B Settlement Statement. Please validate T+70B Settlement Statement and file SDS dispute to CAISO if you do not see the expected results.

# Intertie Deviation Settlement

## 4) Incorrect Final Tag Quantity:

Settlements received incorrect final tag quantity from ITS. The root cause was ITS-UI was reflected with correct tag quantity but a different value was getting generated for the payload to settlement.

Impacted Resources = Intertie Resources

Direct Impacted Charge Codes = RTD-IIE Settlement (CC6470) and Intertie Deviation Settlement (CC6456)

## Status Update:

CAISO has **fixed** this issue effective from Trade Date 2/16/2021. Corrections for Trade Dates from 2/1/2021 through 2/15/2021 will be reflected on T+70B Settlement Statement. Please validate T+70B Settlement Statement and file SDS dispute to CAISO if you do not see the expected results.

# Intertie Deviation Settlement

## 5) Reliability Curtailed MW

Tags that have been curtailed by a BAA's/TSP's for reliability reasons need to be excluded from the Intertie Deviation Settlement calculations. Settlements is receiving other BAA's/TSP's curtailment MW **partially** in the new ITS payload. Consequently, we are not capturing the Reliability Curtailments for the calculation of Hourly Block Intertie Deviation. We have seen this issue only for a few resources. A critical variance was created for this issue and our vendor is currently working on the fix.

Impacted Charge Code = CC6456.

Once we fix the variance, the fix should address the impacted resources when the resource e-Tag is curtailed by other BAA's/TSP's. We will provide updates in SUG call once the fix is in. Please validate T+9B Settlement Statement and file SDS dispute if you are not seeing the expected results for Curtailed MW.

# Intertie Deviation Settlement

## 6) Decline MW in ADS

When the SC “Declines” the dispatch in ADS and accept only 0MW, that 0MW is not getting processed correctly in Settlements to calculate the Intertie Deviation Penalty Amount. The root cause is, we are suppressing the 0MW in the calculations. As a result, settlement takes the HASP schedule as the ADS accepted MW for the undelivered deviation calculation. Note this only impacts the resources that declines the ADS dispatch (ADS Accepted MW of 0). We have created a variance to resolve the issue and we are working on the fix now.

Impacted Charge Code = CC6456

We will communicate in the SUG call once the fix is in.

# Intertie Deviation Settlement

Question) Is Intertie Deviation Settlement price impacted?

Answer) No. There are no issues with the price.

HB Intertie Deviation Settlement – Under/Over delivery charge will be calculated at a price equal to 50% of the greater of the real time dispatch or 15-minute locational marginal price. This charge shall be applied for each five interval in which an under/over delivery quantity is calculated.

Charged at 50% of MAX (FMM, RTD) LMP with \$10/MWh minimum.

# Summary of Issues

Issues	Name of the Issue	Impacted Trade Dates	FMM-IIE Settlement	RTD-IIE Settlement	Intertie Deviation Settlement
1	Delayed Activation on T-40 Tag TP	2/1 through 2/8/2021	YES	YES	NO
2	Incorrect Input of T-40 Tag TP to Real-Time	2/9 through 3/15/2021	YES	YES	NO
3	Doubling the Tag Quantity	2/1 through 2/11/2021	NO	YES	YES
4	Incorrect Tag Quantity	2/1 through 2/15/2021	NO	YES	YES
5	Curtailment MW	2/1 through ongoing	NO	NO	YES
6	ADS Decline MW	2/1 through ongoing	NO	NO	YES

# RMR Capacity Cost Allocation

CAISO had the first System RMR resource effective from Trade Date 2/1/2021. Based on the current rules, system RMR resource will get a capacity payment. Since CAISO is revenue neutral, we have to allocate the amount to all BAA's under CAISO based on the total system meter demand.

CAISO identified that there was an implementation issue in receiving the information from upstream application. The root cause was that the source payload was coming with four different TAC areas instead of **System**. Due to this, the RMR allocation amount got quadrupled.

Impacted Charge Code = RMR Capacity Cost Allocation (CC7026).

CAISO has fixed the issue effective from Trade Date 2/12/2021. Corrections for Trade Dates from 2/1/2021 through 2/11/2021 will be reflected on T+70B Settlement Statement.

# Recent Tweets



The screenshot displays four tweets from the account @ISOSettlements. Each tweet includes a profile picture of a sun rising over a green field, the account name and handle, a timestamp, the main text of the tweet, and a link. Below each tweet are icons for replying, retweeting, liking, and sharing.

- Tweet 1:** @ISOSettlements @isosettlements · 38m  
Market simulation Spring 2021 Release MAP Stage connectivity testing is 3/8/21 - 3/12/21. [bit.ly/3v9OHZN](https://bit.ly/3v9OHZN)  
1 like
- Tweet 2:** @ISOSettlements @isosettlements · Mar 10  
Any issues related to the Market Participant Portal, please submit a CIDI ticket with the subject line "functional environment and Market Simulation Spring 2021". [bit.ly/3v9OHZN](https://bit.ly/3v9OHZN)  
1 like
- Tweet 3:** @ISOSettlements @isosettlements · Mar 10  
To participate in the Spring 2021 Structured Scenario simulation market participants must submit a request to the @California\_ISO at [marketsim@caiso.com](mailto:marketsim@caiso.com) by 3/11/21.  
3 likes, 1 retweet
- Tweet 4:** @ISOSettlements @isosettlements · 6m  
The next Market Simulation conference calls are scheduled for 3/15/21 and 3/18/21. [bit.ly/3eisGSJ](https://bit.ly/3eisGSJ)  
1 like

# Next SUG Meeting: March 31, 2021

at 10:00 A.M



# Settlement References

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

# Settlement User Group Calendar 2021

Market Services

Settlement User Group Meetings

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



## California ISO

January						
Su	Mo	Tu	We	Th	Fr	Sa
						1
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

March						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

April						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

May						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

July						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

August						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

September						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

October						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

November						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

December						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Meeting
  Agenda posted
  Holiday

# 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.

California ISO Help Center Knowledge articles Cases Submit a

Search

Identifying

Search Results

All Knowledge Cases Collapse List

Knowledge  
5+ Results - Sorted by Relevance View More

Identifying after-the-fact EIM manual dispatches from ISO systems  
000001275 · Last Modified Oct 14, 2019 4:23 PM  
An EIM organization can identify a manual dispatch after the fact using ADS, the ED and CMRI...How can an Energy Imbalance Market (EIM) organization identify, after-the-fact, whether there

## 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
- Calculation of meter data for TG resources
- Pricing node (Pnode) price used for CRR Settlement
- In relation to the Day-Ahead Nodal Pricing Model, the California ISO has posted a Market Analysis report to its website for market participant review. [Nodal Pricing Model Report v1](#)

# ISO Settlements Twitter

- Settlement related updates
- Market sim updates
- Note: Will not replace any existing media communications
- Please take the opportunity to follow [@ISOSettlements on Twitter](https://twitter.com/ISOSettlements) 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



# Ways to participate in settlements

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

# Settlement User Group

Thank you for participating in our call

---

 Follow us on Twitter @ISO Settlements