



California ISO

BPM Change Management Getting Started

Julia Payton

BPM Change Management Administrator

December 11, 2019

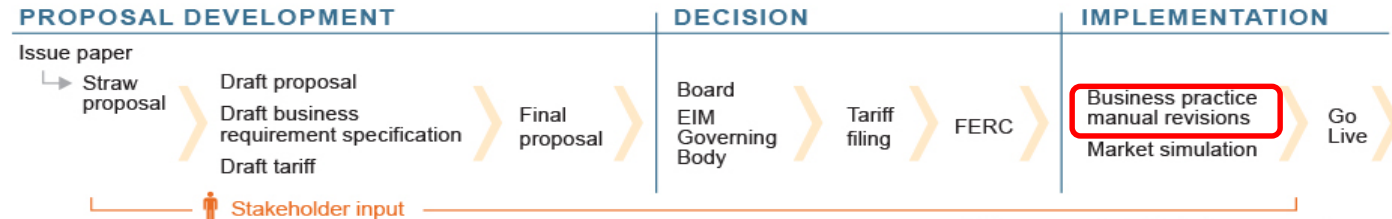
California ISO Business Practice Manuals

BPM Change Management Process

- The BPM change management stakeholder process and the Business Practice Manual for BPM Change Management were created through a stakeholder initiative and received ISO Board approval and FERC approval for implementation in 2009.
- [Business Practice Manual for BPM Change Management](#)
- [Tariff Section 22.11](#)
- Business Practice Manuals (BPMs) provide detailed rules, procedures and examples for administration, operation, planning and accounting requirements of the California ISO and the market that are consistent with the ISO tariff.
- Each subject area in a BPM is based on enabling language in the ISO tariff.
 - *The Proposed Revision Request (PRR) process cannot be used to introduce changes that are not supported by existing tariff authority.*

California ISO Business Practice Manual Change Management

ISO Stakeholder Initiative Process



Reasons for BPM Revisions:

- The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
 - PRRs are submitted prior to the start of market simulation in order for BPMs to be posted to the library by the implementation date.
 - *Policy changes submitted through the PRR process, that are not the result of a stakeholder initiative, will be referred to the policy initiative road map process.*

Changes that may occur outside of a Stakeholder Initiative Process:

- Dispute resolutions
- Settlements corrections
- Operations Issues
- The need for language clarification

Emergency BPM Revisions:

- When a BPM change effective date occurs retroactively or prior to the completion of the PRR process, the PRR is submitted as an Emergency PRR.


ISO Business Practice Manual Web Page





Found on www.caiso.com

- Rules > Business practice manuals
- Direct Link: [BPM Change Management](#)

Please [click here](#) to view the BPM Library

Please [click here](#) to access the BPM Change Management application

The BPM Change Management application contains a built-in user guide. For help on a page, click the  icon.

	Business Practice Manual for BPM Change Management	
	Business Practice Manual Change Management - Getting Started	12/10/2019 10:54
	Business Practice Manuals Posted to Library	11/08/2019 14:07
	Business Practice Manual Proposed Revision Request Submittal 2019 Calendar	10/29/2019 11:26

Meetings

- ⊖ [Business practice manuals change management meetings](#) 
Monthly meeting to discuss proposed revision requests on Business Practice Manuals (BPMs) that are in the initial and recommendation stages of the BPM change management stakeholder process.
 - ⊕ [Stakeholder meetings - 2019](#) 
- ⊖ [Appeal committee meetings](#) 
Stakeholders have the right to appeal the final decision of a proposed revision request (PRR). Upon appeal, an ISO executive appeals committee conducts a public session to hear stakeholder positions and has 21 days to post a decision.
 - ⊕ [Appeal process and template](#) 

Stakeholder Registration

Go to the [BPM Change Management Application](#) page.



[LOGIN](#) [HOME](#) [STAKEHOLDER MEETINGS](#) ▾ [CONTACT BPM CHANGE MANAGER](#) [FAQ](#) [BPM DOCUMENT LIBRARY](#)


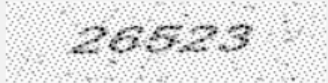


First time registration, click Login on the BPM Change Management application link and fill in the information, then click Register

The image shows a login and registration form. It includes two input fields: "Email" and "Password". Below the "Password" field is a checkbox labeled "Sign me in automatically". A "Login" button is positioned below the checkbox. At the bottom of the form, there are two links: "Forgot Password?" and "Register". A red arrow points to the "Register" link.

Registration Form

Registering allows stakeholders the ability to provide comments and/or Submit a new PRR

 California ISO	BPM - Registration Form
* - Indicates Mandatory Field ?	
Display Name *	<input type="text"/>
Email *	<input type="text"/>
Password *	<input type="password"/> <small>(Password must have at least 1 upper case letter, 1 lower case letter and 1 non-alpha character. Password should contain minimum of 8 characters and a maximum of 16 characters.)</small>
Confirm Password *	<input type="password"/>
Phone *	<input type="text"/> <small>(Valid Format - XXX-XXX-XXXX)</small>
Employer *	<input type="text"/>
Organization Representing *	<input type="text"/>
	 <input type="text"/> <input type="button" value="Generate New Code"/>
<input type="button" value="Register"/> <input type="button" value="Cancel"/>	

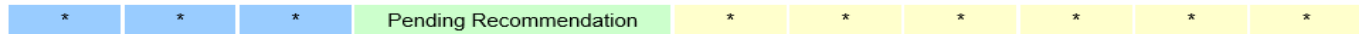
BPM Change Management Application

PRR	PRR Title	BPM	Status	Category	Submitted By	Priority	Last Action	Comments
1096	Capacity test enhancement for energy imbalance market 2018	Energy Imbalance Market	Initial Comment	B	Batakji, Jamal (CAISO)	Emergency	10/24/2018	IC: 0 RC: 0
1095	Pay for performance regulation recertification process change	Market Operations	Pending Recommendation	C	Batakji, Jamal (CAISO)	Normal	10/23/2018	IC: 1 RC: 0
1094	Update the pre-calculation metered sub-system deviation penalty quantity configuration to properly account for metered sub-system Load following instructed imbalance energy for an metered sub-system load following resource	Settlements and Billing	Pending Recommendation	B	Peacock, Bonnie (CAISO)	Emergency	10/23/2018	IC: 0 RC: 0
1093	Enhancement for calculating fifteen-minute schedules from hourly resource	Energy Imbalance Market	Pending Recommendation	C	Batakji, Jamal (CAISO)	Emergency	10/24/2018	IC: 0 RC: 0

Proposed Revision Request Detail



PRR Life Cycle



PRR Details

PRR #	1095
Title	Pay for performance regulation recertification process change
Date Submitted	10/3/2018 3:30 PM
PRR Category	C
Priority	Normal
Owner	Batakji, Jamal (CAISO)
Status	Pending Recommendation
Status End Date	10/23/2018 11:55 PM
Related BPM	Market Operations
BPM Section	4.6.1
Subscribe	

Existing Language

See attached

Announcements

No Announcements has been posted for this PRR.

Impact Analysis

Impact Analysis not available.

Initial Comments

SCE Initial Comments PRR 1095.pdf	10/19/2018 7:35 AM Logged By - aditya.chauhan@sce.com (CAISO)
---	--

Second half of the PRR Form

After Registration is approved, click green plus sign to submit a comment during an open comment period

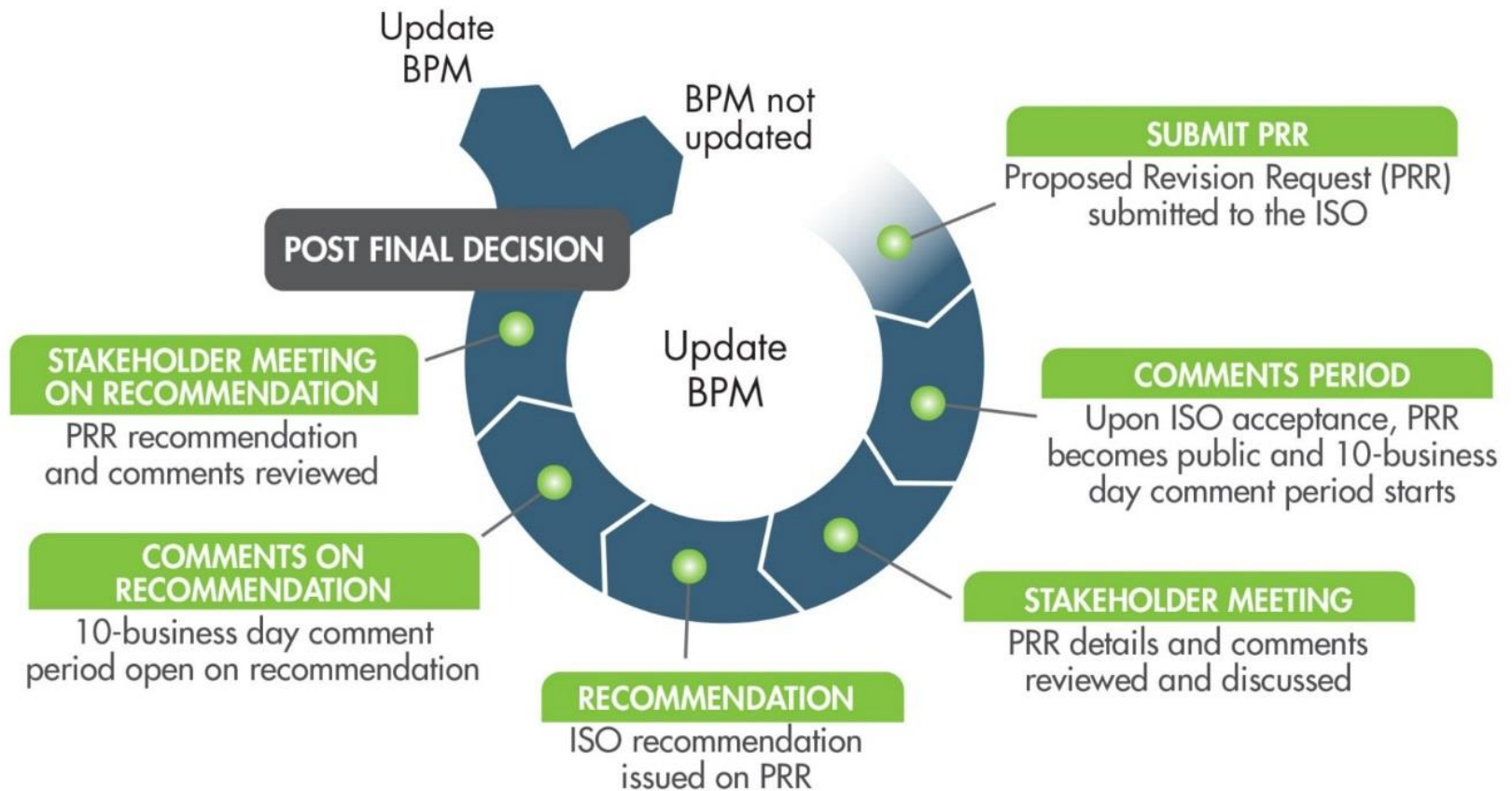
Existing Language
See attached
Proposed Language
See attached
Reason For Revision
This is to clarify the changes in the methodology for resource re-certification. Effective date: January 1, 2019

Initial Comments	
SCE Initial Comments PRR 1095.pdf	10/19/2018 7:35 AM Logged By - aditya.chauhan@sce.com (CAISO)
Recommendation Comments	
No Recommendation Comments available for this PRR.	

Attachments
[Regulation Certification and Testing Requirements.docx](#)

BPM Change Management Process

Proposed Revision Request (PRR) Timeline



BPM Change Management

QUESTIONS?

Julia Payton
BPM Change Management Administrator
(916) 608-1133
BPM_CM@caiso.com