**EXTERNAL DYNAMIC TRANSFER QUESTIONNAIRE CHECKLIST**

1. **Purpose of Coordination Meeting:** To get the details about the project, determine all parties affected, and instructions to move the process forward including timelines.
2. **Dynamic Schedule or Pseudo-Tie?**

|  |  |
| --- | --- |
| **Dynamic Schedule** | |
| Net to grid MW or % of total resource to ISO: |  |
| Resource type: |  |
| Resource name: |  |
| Implementation date: |  |
| Inter-tie / Point of Delivery/Receipt |  |
| Host BA: |  |
| Intermediary BAs: |  |
| Resource owner: |  |
| SC: |  |
| Transmission route/service: |  |
| Any need for curtailment by intermediary BAs? |  |
| Ancillary Service plans? |  |
| Reliability Coordinator for Resource: |  |
| Is Dynamic Resource in an EIM Balancing Authority Area? |  |
| Topics/Questions for the CAISO: |  |

|  |
| --- |
| 1. **New Resource Implementation:**     1. Create Dynamic project in RIMS and get UAA Access and provision users    2. Complete the Full Network Model and NRI Bucket requirements to complete the NRI Process    3. Interconnection Agreement with Host BA and proof of Transmission pathway to ISO control grid 2. **Agreements:**   🞎 Dynamic Scheduling Host Balancing Authority Operating Agreement (“DSHBAOA”)  🞎 Dynamic Transfer Balancing Authority Operating Agreement (“DTBAOA”)  🞎 Scheduling Coordinator Agreement (“SCA”)  🞎 Dynamic Scheduling Agreement for Scheduling Coordinators (“DSASC”)   1. **EMS Testing:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** 2. **Interchange for system operations:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** 3. **Please review the** [2500 Operating procedures](http://www.caiso.com/rules/Pages/OperatingProcedures/Default.aspx) |

|  |  |
| --- | --- |
| **Pseudo-Tie** | |
| Net to grid MW to ISO: |  |
| Resource type: |  |
| Resource name: |  |
| Sync/COD date: |  |
| Inter-tie / Point of Delivery |  |
| Native BA: |  |
| Intermediary BAs |  |
| Resource owner: |  |
| SC: |  |
| Transmission route/service: |  |
| Any need for curtailment by intermediary BAs? |  |
| Ancillary Service plans? |  |
| New Construction or Existing? |  |
| Agreement selection (DTBAOA, DSHBAOA)? |  |
| Reliability Coordinator for Resource: |  |
| Is Dynamic Resource in an EIM Balancing Authority Area? |  |
| Topic or Questions with the CAISO |  |

1. **New Resource Implementation:** 
   1. Create Pseudo Tie project in RIMS
   2. Complete the Full Network Model and NRI Bucket requirements to complete the NRI Process (IA with Native BA will be required)
   3. Trial Operations / Procedure 5320 *(if new construction)*
2. **Agreements:**

🞎 Dynamic Transfer Balancing Authority Operating Agreement (“DTBAOA”)

🞎 Pseudo-Tie Participating Generator Agreement (“PPGA”)

🞎 Meter Service Agreement for CAISO Metered Entities (“MSACAISOME”) or Meter Service Agreement for Scheduling Coordinators (MSASC), subject to approval by FERC for implementation in mid-April 2017.

🞎 Scheduling Coordinator Agreement (“SCA”)

1. **EMS Testing:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
2. **Interchange for system operations:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Please review the** [**2500 Operating procedures**](http://www.caiso.com/rules/Pages/OperatingProcedures/Default.aspx)