



BPM Change Management Meeting

Isabella Nicosia

BPM Change Management Process Administrator

BPM_CM@caiso.com

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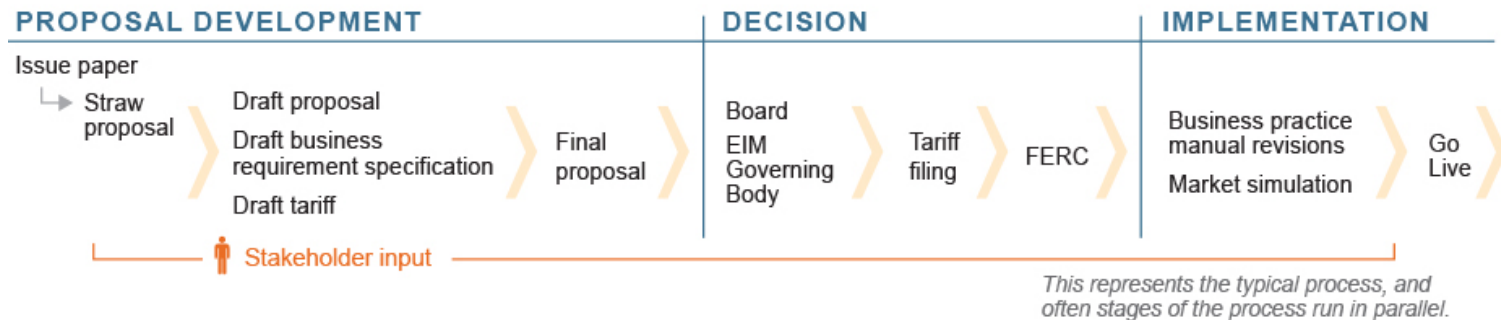
Agenda – BPM Change Management Meeting

December 17, 2019

Topic	Presenter
Introduction / Meeting Overview	Isabella Nicosia
Discussion of active proposed changes: Reliability Requirements BPM Generator Interconnection and Deliverability Allocation Procedures BPM Generator Management BPM Congestion Revenue Rights BPM Settlements and Billing BPM Outage Management BPM Market Instruments BPM Market Operations BPM	Preethi Rondla Jason Foster Debi Le Vine Jim McClain Brenda Corona Kalyani Abhyankar Jamal Batakji Jamal Batakji
Wrap-Up and Next Steps	Isabella Nicosia

BPM Change Management Process
 916-608-1133 BPM_CM@caiso.com

California ISO Stakeholder Initiative Process



- Business Practice Manuals
 - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
 - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
 - *Policy changes submitted through the PRR process will be referred to the policy initiative road map process.*
 - Each subject area in a BPM is based on enabling language in the ISO tariff.
 - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

Reliability Requirements BPM

PRR	PRR Title	Stage
1219	Clarifying process of rate of change sanctions for resource adequacy and supply plan when scheduling coordinator of record changes	Initial

PRR 1219 – Clarifying process of rate of change sanctions for resource adequacy and supply plan when scheduling coordinator of record changes

- Reason for revision
 - ISO is clarifying process of roc sanctions for resource adequacy and supply plan when scheduling coordinator of record changes
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - January 8, 2020
- Next step:
 - Post recommendation

Generator Interconnection and Deliverability Allocation Procedures BPM

PRR	PRR Title	Stage
1218	2018 interconnection process enhancements-affected systems clarifications, cost responsibility updates, and reliability network upgrades reimbursement cap updates	Recommendation

PRR 1218 – 2018 interconnection process enhancements-affected systems clarifications, cost responsibility updates, and reliability network upgrades reimbursement cap updates

- Reason for revision
 - Affected PTO repayment clarifications, network upgrade and cost responsibility updates, and RNU reimbursement cap updates
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 8, 2020
- Next step:
 - Post final decision

Generator Management BPM

PRR	PRR Title	Stage
1213	Termination of negotiated bids upon retirement	Recommendation
1211	Deliverability transfer modifications	Recommendation

PRR 1213 – Termination of negotiated bids upon retirement

- Reason for revision
 - At the request of DMM, the change is to adjust the BPM to explain that MQCRA/DMM will terminate negotiated values such as MMAs when a resource termination is effective.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 8, 2020
- Next step:
 - Post final decision

PRR 1211 – Deliverability transfer modifications

- Reason for revision
 - Revisions are due to the final FERC order for 2018 Interconnection Procedure Enhancements (IPE) implementation.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - SDG&E; submitted 1/7/2020
- Next step:
 - Post final decision

Congestion Revenue Rights BPM

PRR	PRR Title	Stage
1217	Clarification of congestion revenue rights processes 2019	Recommendation

PRR 1217 – Clarification of congestion revenue rights processes 2019

- Reason for revision
 - Updated sections to provide further clarification about the CRR process
- Recommendation comments:
 - PG&E; submitted 1/7/2020
 - DC Energy; submitted 1/7/2020
- Recommendation comment period expired:
 - January 8, 2020
- Next step:
 - Post final decision

Settlements and Billing BPM

PRR	PRR Title	Stage
1216	Update the settlement charge code to adjust the effective date of the shaping functionality for static and dynamic energy transfer system resources back to 4/4/2018	Recommendation
1215	Updated BPM configuration guides for charge code 6700 congestion revenue rights hourly settlement and charge code 6701 monthly congestion revenue rights true-up to resolve CRR notional amount processing issue for the CRR monthly true-up	Recommendation

PRR 1216 – Update the settlement charge code to adjust the effective date of the shaping functionality for static and dynamic energy transfer system resources back to 4/4/2018

- Reason for revision
 - Due to a dispute, a portion of the changes for real time market neutrality that was previously released as part of 2019 Fall Release, specifically the shaping functionality for static and dynamic ETSRs will be updated to have an effective date of 4/4/18.
 - The ISO anticipates implementation of the BPM changes on or about December 11, 2019, with a retroactive effective date 4/4/2018.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 8, 2020
- Next step:
 - Post final decision

PRR 1215 – Updated BPM configuration guides for charge code 6700 congestion revenue rights hourly settlement and charge code 6701 monthly congestion revenue rights true-up to resolve CRR notional amount processing issue for the CRR monthly true-up

- Reason for revision
 - The current configuration is causing a mismatch between monthly and daily runs. A configuration issue has been raised where the monthly initial CRR Notional amount does not reflect the daily initial CRR Notional amount. Instead, the monthly initial CRR Notional amount reflected the latest data available when we initiated the monthly run.
 - The new configuration will address this issue. In particular, CC 6701 (monthly CRR) will rely on a new CC 6700 daily calculation. CC 6700 will be updated to capture the daily Notional inputs. In addition, similar formulas will be created for Clawback and Circular Schedule.
 - The effective trade date of the change is 12/1/2019, with a planned implementation date of 11/25/2019.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 8, 2020
- Next step:
 - Post final decision

Outage Management BPM

PRR	PRR Title	Stage
1214	Discovery date/time for forced outages	Recommendation

PRR 1214 – Discovery date/time for forced outages

- Reason for revision
 - The ISO is providing additional language to capture the existing process of submission of discovery date/time for forced outages.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 8, 2020
- Next step:
 - Post final decision

Market Instruments BPM

PRR	PRR Title	Stage
1212	Major maintenance adders during scheduling coordinator change	Recommendation

PRR 1212 – Major maintenance adders during scheduling coordinator change

- Reason for revision
 - This is to clarify the business processes surrounding the treatment of Major Maintenance Adders. In the situation of a scheduling coordinator change, the ISO proposes to provide the new scheduling coordinator a 30-day grace period during which they may be eligible to use a temporary MMA value. Effective date is after the PRR cycle ends
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 8, 2020
- Next step:
 - Post final decision

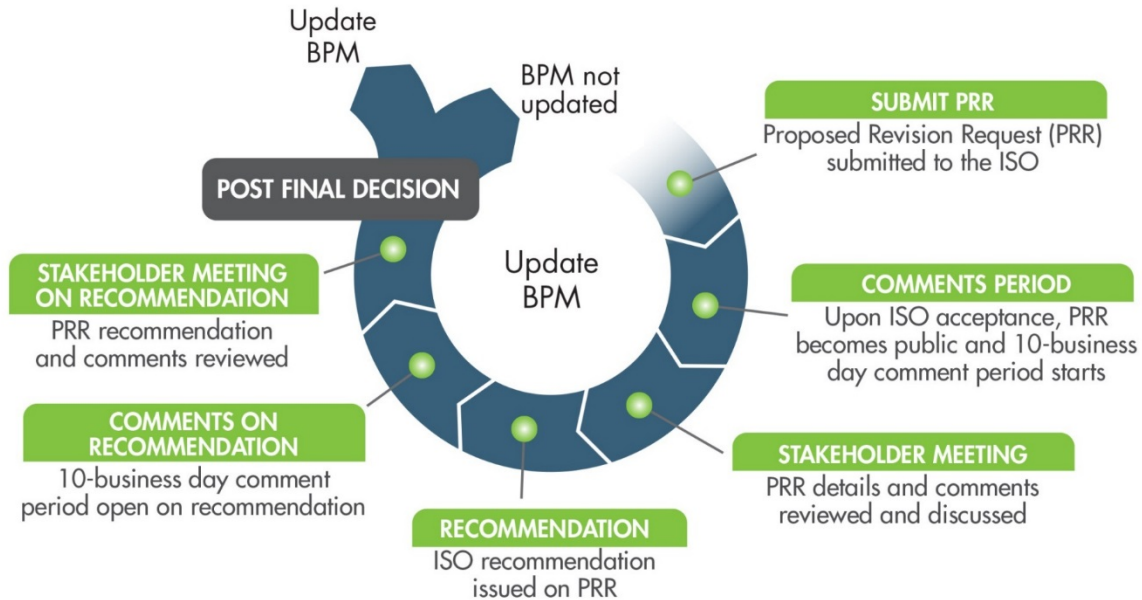
Market Operations BPM

PRR	PRR Title	Stage
1210	Methodology for satisfying non-performance of pay for performance regulation requirements	Recommendation

PRR 1210 – Methodology for satisfying non-performance of pay for performance regulation requirements

- Reason for revision
 - Provide an additional method for satisfying the Regulation recertification requirement in the event of a resource’s failure to meet the minimum performance threshold for one or more months of a calendar quarter. Effective date is as soon as the PRR process cycle is completed.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 8, 2020
- Next step:
 - Post final decision

Next BPM PRR Review Monthly Meeting: February 25, 2020 @ 11 a.m.



BPM change management
process questions:

Isabella Nicosia

916-608-5829

BPM_CM@caiso.com