



BPM Change Management Meeting

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June 22, 2021

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- Calls are structured to stimulate an honest dialogue and engage different perspectives.
- Please keep comments professional and respectful.

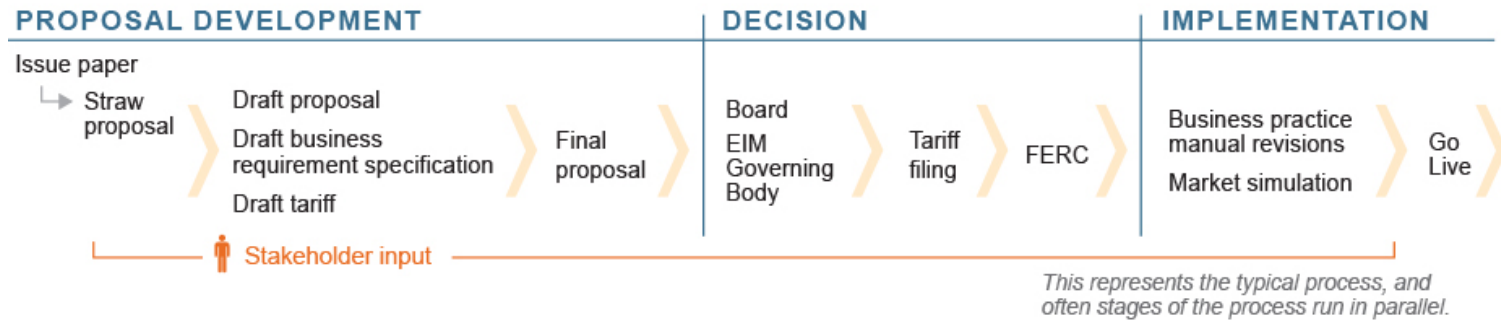
Agenda – BPM Change Management Meeting

June 22, 2021

Topic	Presenter
Introduction / Meeting Overview	Nicole Hines
Discussion of active proposed changes: Market Operations BPM Energy Imbalance Market BPM Market Instruments BPM Reliability Requirements BPM Candidate CRR Holder Registration BPM Metering BPM Direct Telemetry BPM Settlements and Billing BPM Outage Management BPM Demand Response BPM	Jamal Batakji Jamal Batakji Jamal Batakji Melanie Bogen Nicole Hines Priyanka Namburi Priyanka Namburi Brenda Corona Kalyani Abhyankar Hewayda Ahmed
Wrap-Up and Next Steps	Nicole Hines

BPM Change Management Process
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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.*

Market Operations BPM

PRR	PRR Title	Stage
1360	Summer Readiness 2021 as it relates to Market Operations BPM for effective July scheduling priorities for exports and load	Initial
1359	Summer Readiness 2021 as it relates to Market Operations BPM effective July penalty prices update	Initial
1348	Description of losses impact on POR energy LMPs	Initial
1345	Market Operations BPM changes as it relates to Scheduling Priorities	Initial
1344	Summer readiness 2021 as it relates to market operations BPM	Recommendation

PRR 1360 – Summer Readiness 2021 as it relates to Market Operations BPM for effective July scheduling priorities for exports and load

- Reason for revision
 - Added new sections in Market Operations BPM due to the Summer Readiness initiative related to Load, export, and wheeling priorities.
 - Effective date: July 15, 2021 (pending FERC approval)
- Initial comments:
 - PG&E; submitted 6/15/21
 - WPTF; submitted 6/15/21
 - APS; submitted 6/9/21
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

PRR 1359 – Summer Readiness 2021 as it relates to Market Operations BPM effective July penalty prices update

- Reason for revision
 - Changes to market Operations BPM section 6.6.5 due to Summer Readiness initiative related to Load, export, and wheeling priorities.
 - Effective date: July 15, 2021 (pending FERC approval)
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

PRR 1348 – Description of losses impact on POR energy LMPs

- Reason for revision
 - For resources that are physically located away from its corresponding POR, describe the impact the different loss components, and thus LMP marginal cost of losses, between those two locations has on energy prices. Furthermore, note that the market model uses the bids at the physical location when determining which resource is economical to dispatch.
- Initial comments:
 - PG&E; submitted 5/13/21
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

PRR 1345 – Market Operations BPM changes as it relates to Scheduling Priorities

- Reason for revision
 - This PRR is to address removing the higher priority that RUC exports are given in the real-time market. We also provided additional descriptions of the import leg and export leg of wheel through self-schedules to provide additional clarity. These BPM changes will be effective immediately since they do not require tariff changes.
- Initial comments:
 - PGE; submitted 6/14/21
 - Idaho Power; submitted 6/4/21
 - SRP; submitted 5/18/21
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

PRR 1344 – Summer readiness 2021 as it relates to market operations BPM

- Reason for revision
 - This change is related to summer readiness initiative focus on reliability demand response dispatch and real-time price impact changes, management of storage resources during tight system conditions, real-time price during tight system conditions.
 - Effective date is 6/1/21
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

Energy Imbalance Market BPM

PRR	PRR Title	Stage
1358	Summer Readiness 2021 as it relates to EIM BPM Effective June Auto-Mirror changes	Initial
1349	Summer readiness 2021 as it relates to the energy imbalance market BPM	Recommendation

PRR 1358 – Summer Readiness 2021 as it relates to EIM BPM Effective June Auto-Mirror changes

- Reason for revision
 - This is part of the Summer Readiness initiative. This change is to update the mirror system resources to have auto-mirroring enabled for transactions between the ISO and other EIM balancing authority areas in accordance with the specific procedure detailed in this draft.
 - Effective Date: June 15, 2021
- Initial comments:
 - SRP; submitted 6/15/21
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

PRR 1349 – Summer readiness 2021 as it relates to the energy imbalance market BPM

- Reason for revision
 - This change is related to summer readiness initiative focus on changes related to bid range capacity test, and changes related to the last solved advisory dispatch results.
 - Effective Date: June 15, 2021
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

Market Instruments BPM

PRR	PRR Title	Stage
1357	Market instrument changes related to FERC Order 831 Phase 2	Initial
1354	Market Instrument BPM cleanup	Recommendation
1353	Clarification of DOT breakdown for EIRs	Initial
1346	Summer Readiness 2021 as it relates to market instruments	Recommendation
1340	Average costs in generator resource data template	Recommendation

PRR 1357 – Market instrument changes related to FERC Order 831 Phase 2

- Reason for revision
 - Changes related to FERC Order 831 Phase 2, adding Appendix P that details the Max Import Bid Price calculation, and other miscellaneous edits.
 - Effective Date: 6/15/2021
- Initial comments:
 - SRP; submitted 6/15/21
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

PRR 1354 – Market Instrument BPM cleanup

- Reason for revision
 - These changes are being made to further clarify the CAISO's practices around the processing Reference Level Change Requests. The CAISO is also clarifying the content of certain CMRI reports
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

PRR 1353 – Clarification of DOT breakdown for EIRs

- Reason for revision
 - Provide clarification that the negative SUPP component for EIRs is a result of market curtailment
- Initial comments:
 - Gridwell Consulting for WPTF; submitted 5/18/21
 - PG&E; submitted 5/5/21
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

PRR 1346 – Summer Readiness 2021 as it relates to market instruments

- Reason for revision
 - This change is related to summer readiness initiative focus on Master File changes.
 - Effective date is 7/1/21
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

PRR 1340 – Average costs in generator resource data template

- Reason for revision
 - This is to clarify the expectation of the types of costs that can be included in the Average Costs field the Generator Resource Data Template.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

Reliability Requirements BPM

PRR	PRR Title	Stage
1356	2022 availability assessment hours	Initial
1343	Resource adequacy enhancements phase 1	Recommendation
1341	Maximum import capability (MIC) multi-year import allocation reservations and revisions to the remaining import capability allocation as well as increased transparency regarding import allocations	Recommendation

PRR 1356 – 2022 availability assessment hours

- Reason for revision
 - Added availability assessment hours for 2022.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

PRR 1343 – Resource adequacy enhancements phase 1

- Reason for revision
 - To include the new Resource Adequacy Enhancement (RAE) Phase 1 Tariff updates as well as some changes related to 2021 summer readiness.
 - Effective date is 6/1/21
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

PRR 1341 – Maximum import capability (MIC) multi-year import allocation reservations and revisions to the remaining import capability allocation as well as increased transparency regarding import allocations

- Reason for revision
 - As a result of the Maximum Import Capability (MIC) stabilization and multi-year allocation stakeholder process, the California Independent System Operator Corporation (CAISO) is revising its available import capability allocation process in order to allow load serving entities to reserve import capability at the intertie level on a multi-year basis, consistent with their long-term import contracts, during each annual import capability allocation process. In addition, the CAISO proposes to revise its existing import allocation process to allocate Remaining Import Capability consistent with Load Share Quantity and to increase transparency by publishing information regarding import capability allocations at each Intertie.
 - Effective date is 6/1/21
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

Candidate CRR Holder Registration BPM

PRR	PRR Title	Stage
1355	CRR holder minor revision to correct typographical errors	Initial

PRR 1355 – CRR holder minor revision to correct typographical errors

- Reason for revision
 - The reason for this revision is to correct errors found in the BPM document related to duplicate section in Attachment A and removal of erroneous information about the CRR Application fee.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - June 15, 2021
- Next step:
 - Post recommendation

Metering BPM

PRR	PRR Title	Stage
1352	Distribution credit factor requirement and energy imbalance market load aggregation point description	Recommendation

PRR 1352 – Distribution credit factor requirement and energy imbalance market load aggregation point description

- Reason for revision
 - New Section 6.1.5
 - Added information for ELAP calculation
 - Updated Section 5.1.1 to include DCF requirement
 - Effective date is 7/1/21
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

Direct Telemetry BPM

PRR	PRR Title	Stage
1351	Distribution credit factor requirement	Recommendation

PRR 1351 – Distribution credit factor requirement

- Reason for revision
 - Adding a requirement that DCF should also be included in the Telemetry. Effective Date 7/1/2021.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

Settlements and Billing BPM

PRR	PRR Title	Stage
1350	Created 6483 hour-ahead scheduling process uplift settlement, and 6484 hour-ahead scheduling process uplift settlement allocation to accommodate the changes as per the real time market import & export market incentives during tight system conditions	Recommendation
1339	To exempt internal pseudo-tie resources from intertie deviation settlement (IDS) penalty and to exempt resources	Recommendation
1338	Update measured demand precalc to fix pro-ration for load aggregation point neutrality and CC 8835 allocations	Recommendation

PRR 1350 – Created 6483 hour-ahead scheduling process uplift settlement, and 6484 hour-ahead scheduling process uplift settlement allocation to accommodate the changes as per the real time market import & export market incentives during tight system conditions

- Reason for revision
 - CAISO believes that under normal operating conditions it continues to be appropriate to clear hourly block imports and exports in the Hour-Ahead Scheduling Process Uplift and settle them at FMM prices without provisions for a make-whole payment to bid price. During very tight system conditions, the benefits of provisions for an import bid make-whole payment likely exceed the drawbacks. Consequently, the CAISO proposes provisions for bid cost make-whole payments for real-time market hourly block economic imports during tight system conditions.
 - The CAISO proposes that the imports eligible for a bid make-whole payment include:
 - Real-time market incremental energy that are incremental to any import amount scheduled in the day-ahead market.
 - Real-time market incremental energy that are the result of an export scheduled in the day-ahead market and reduced by the real-time market.
 - The effective date of the changes is 6/1/2021 and the anticipated implementation date is 6/29/2021
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

PRR 1339 – To exempt internal pseudo-tie resources from intertie deviation settlement (IDS) penalty and to exempt resources

- Reason for revision
 - An issue was identified through a market participant dispute whereby the ADS penalty was incorrectly assessed against resources with valid ETC/TOR contracts. Configuration change to the formula for the Additional ADS Penalty Quantity has been applied to correct this settlement logic under CC 6456 impacting any market participant with a valid ETC/TOR contract.
 - Additional configuration changes have been made to create a new Factor Data. This new Factor Data applies only to market participants with internal pseudo-tie resources specifically contracted for IDS penalty exemption.
 - These change are being implemented as an emergency fix within the spring settlements release anticipated for deployment on 4/28/21 with a 2/1/21 effective date
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

PRR 1338 – Update measured demand precalc to fix pro-ration for load aggregation point neutrality and CC 8835 allocations

- Reason for revision
 - Configuration guide for PC Measured Demand Over Control Area has been updated to fix these two separate issues. Minor change to expose attributes u (UDC) and M' (MSS ID) were also made for input change from this pre-calculation into CC 6475, CC 6985, and PC Real Time Congestion.
 - The fix will be deployed on or about April 28, 2021.
 - The effective date will be TD 1/1/2021 for the CC 8835 measured demand fix which impacts RAAIM PC and eventually CC 8835. However, the LAP neutrality allocation fix will be effective TD 8/1/2018.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

Outage Management BPM

PRR	PRR Title	Stage
1347	Summer readiness 2021 as it relates to resource adequacy enhancements phase-1	Recommendation

PRR 1347 – Summer readiness 2021 as it relates to resource adequacy enhancements phase-1

- Reason for revision
 - Include updates related to the RA enhancements phase 1 and changes related to the summer readiness effective from 06/01/2021.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

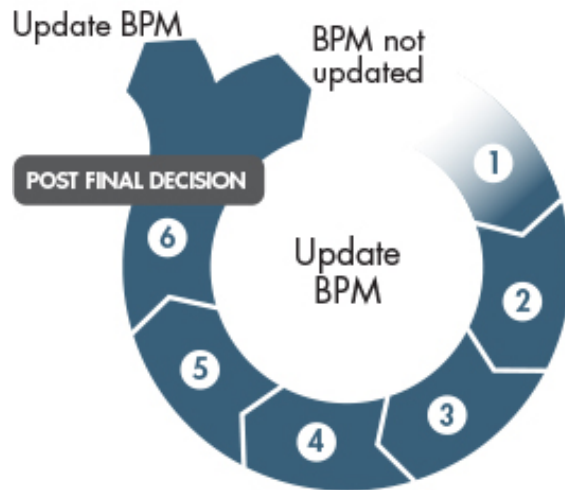
Demand Response BPM

PRR	PRR Title	Stage
1342	Updates to reliability demand response resource bid dispatch and addition of Appendix G to demand response BPM	Recommendation

PRR 1342 – Updates to reliability demand response resource bid dispatch and addition of Appendix G to demand response BPM

- Reason for revision
 - Updates to the RDRR Bid Dispatchable options are needed to align with Summer readiness. The addition of Appendix G is to provide additional information for the Load Cap Adjustment Request Form.
 - Effective date is 5/1/2021
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - June 15, 2021
- Next step:
 - Post final decision

Next BPM PRR Review Monthly Meeting: July 27, 2021 @ 11 a.m.



- 1 SUBMIT PRR**
Proposed Revision Request (PRR) submitted to the ISO
- 2 COMMENTS PERIOD**
Upon ISO acceptance, PRR becomes public and 10-business day comment period starts
- 3 STAKEHOLDER MEETING**
PRR details and comments reviewed and discussed
- 4 RECOMMENDATION**
ISO recommendation issued on PRR
- 5 COMMENTS ON RECOMMENDATION**
10-business day comment period open on recommendation
- 6 STAKEHOLDER MEETING ON RECOMMENDATION**
PRR recommendation and comments reviewed

BPM change management
process questions:
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