



# BPM Change Management Meeting

Nicole Hines

BPM Change Management Process Administrator

[BPM\\_CM@caiso.com](mailto:BPM_CM@caiso.com)

May 26, 2020

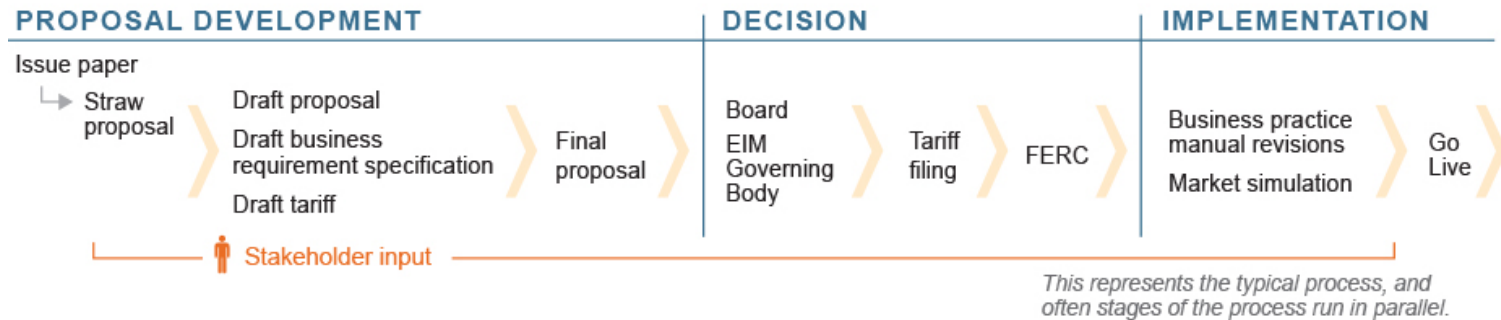
# Agenda – BPM Change Management Meeting

## May 26, 2020

Topic	Presenter
Introduction / Meeting Overview	Nicole Hines
<b>Discussion of active proposed changes:</b>	
Metering BPM	Priyanka Namburi
Outage Management BPM	Kalyani Abhyankar
Generator Management BPM	Debi Le Vine
Generator Interconnection Procedures BPM	Debi Le Vine
Generator Interconnection and Deliverability Allocation Procedures BPM	Debi Le Vine
Demand Response BPM	Pia Sok
Market Operations BPM	Jamal Batakji
Market Instruments BPM	Jamal Batakji
Settlements and Billing BPM	Brenda Corona
Reliability Requirements BPM	Kyle Woody, Melanie Schimschal
Transmission Planning Process BPM	Jeff Billinton
Congestion Revenue Rights BPM	Jim McClain
Wrap-Up and Next Steps	Nicole Hines

BPM Change Management Process  
 916-608-5862 [BPM\\_CM@caiso.com](mailto: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.*

# Metering BPM

PRR	PRR Title	Stage
1253	Energy storage and distributed energy resources 3B Updates	Initial

# PRR 1253 – Energy storage and distributed energy resources 3B Updates

- Reason for revision
  - Energy storage and distributed energy resources (ESDER) 3B initiative updates added PDR Load Shift Resource information
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# Outage Management BPM

PRR	PRR Title	Stage
1252	Language to clarify 24 hour outage rule	Initial
1248	Updates for energy storage and distributed energy resources 3B to sections 3.4 and 4.1	Initial
1236	Removal of section 4.5 as an implementation of 1122 appeals decision	Recommendation

# PRR 1252 – Language to clarify 24 hour outage rule

- Reason for revision
  - This is resubmission of the originally withdrawn PRR 1137.
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# PRR 1248 – Updates for energy storage and distributed energy resources 3B to sections 3.4 and 4.1

- Reason for revision
  - Updates for energy storage and distributed energy resources (ESDER) 3B initiative.
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation



# PRR 1236 – Removal of section 4.5 as an implementation of 1122 appeals decision

- Reason for revision
  - This emergency implementation is due to PRR 1122 Appeal Committee Decision.
- Recommendation comments:
  - No comments submitted
- Recommendation comment period expired:
  - May 19, 2020
- Next step:
  - Post final decision

# Generator Management BPM

PRR	PRR Title	Stage
1251	Implementation of FERC Order 845 changes to the Generator Interconnection Procedures	Initial

# PRR 1251 – Implementation of FERC Order 845 changes to the Generator Interconnection Procedures

- Reason for revision
  - Implement changes required by FERC Order 845 including requirements for control equipment, expanding modifications allowed after the studies, adding the ability to transfer surplus interconnection service and introducing permissible technological advancements. In addition the CAISO is clarifying the facilities reassessment process.
- Initial comments:
  - SDG&E; submitted 5/19/2020
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# Generator Interconnection Procedures BPM

PRR	PRR Title	Stage
1250	Implementation of FERC Order 845 for Generator Interconnection Procedure and Agreements	Initial

# PRR 1250 – Implementation of FERC Order 845 for Generator Interconnection Procedure and Agreements

- Reason for revision
  - Implement the changes order by FERC to revise the Generator Interconnection Procedure and associated Generator Interconnection Agreements. The changes include the requirement for control equipment on generators, allowing transfer of surplus interconnection service and adding permissible technological advances for a fee instead of a modification assessment deposit.
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# Generator Interconnection and Deliverability Allocation Procedures BPM

PRR	PRR Title	Stage
1249	Implementation of FERC Order 845	Initial

# PRR 1249 – Implementation of FERC Order 845

- Reason for revision
  - Implementation of FERC Order 845 which amended the Generator Interconnection Process and Agreements. Specifically for GIDAP clarifying text; and adding additional functionality including expanding the scope of studies; expanding the changes allowed after the Phase I results; transfer of surplus interconnection service and permissible technological advancements.
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# Demand Response BPM

PRR	PRR Title	Stage
1247	Updates for energy storage and distributed energy resources 3B initiative	Initial



# PRR 1247 – Updates for energy storage and distributed energy resources 3B initiative

- Reason for revision
  - Updates for ESDER 3B initiative, and minor clarification on existing process in Sections: 2.6, and 3.
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# Market Operations BPM

PRR	PRR Title	Stage
1246	Changes to market operations related to energy storage and distributed energy resource initiative	Initial
1235	Manual dispatch codes	Recommendation

# PRR 1246 – Changes to market operations related to energy storage and distributed energy resource initiative

- Reason for revision
  - This update is related to part 3B of energy storage and distributed energy resource (ESDER) multi-phased initiative that allows the renewable resources to participate more efficiently in the market. In particular, the ISO developed a load shift product to allow behind the meter storage devices to assist in load curtailment, as well as load consumption, under the proxy demand response (PDR) participation model.
  - Effective date:10/1/2020
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

## PRR 1235 – Manual dispatch codes

- Reason for revision
  - This is an update to the listing of expected energy types to include some manual dispatch codes. This is already in effect.
- Recommendation comments:
  - No comments submitted
- Recommendation comment period expired:
  - May 19, 2020
- Next step:
  - Post final decision

# Market Instruments BPM

PRR	PRR Title	Stage
1245	Changes to market instruments related to energy storage and distributed energy resource initiative	Initial
1242	Changes to hydro default energy bid formulation	Initial

# PRR 1245 – Changes to market instruments related to energy storage and distributed energy resource initiative

- Reason for revision
  - This update is related to part 3B of energy storage and distributed energy resource (ESDER) multi-phased initiative that allows the renewable resources to participate more efficiently in the market. In particular, the ISO developed a load shift product to allow behind the meter storage devices to assist in load curtailment, as well as load consumption, under the proxy demand response (PDR) participation model.
  - Effective date:10/1/2020
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# PRR 1242 – Changes to hydro default energy bid formulation

- Reason for revision
  - CAISO is changing the formulation of the weighting factor that applies to the long-term component of the Hydro Default Energy Bid to a dynamic weighting factor that considers index prices in highest to lowest ranking order. The ISO also clarifies fallback logic when power prices are missing and the liquidity criteria for considering additional pricing hubs.
  - Effective Date: 05/01/2020
- Initial comments:
  - SCE; submitted 5/19/2020
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# Settlements and Billing BPM

PRR	PRR Title	Stage
1244	Updated BPM configuration guide for CC 6045 over and under scheduling EIM settlement to align the documentation with current active settlement configuration	Initial



# PRR 1244 – Updated BPM configuration guide for CC 6045 over and under scheduling EIM settlement to align the documentation with current active settlement configuration

- Reason for revision
  - This change is in result of a pass through bill variable that was not included in the configuration guide but was present in Settlements configuration ( Effective date was 3/1/2017) .
  - CC 6045 Over and Under Scheduling EIM Settlement to include this variable in the documentation to maintain consistency with Settlements configuration.
  - The variable is already active in the system, and these are documentation only changes, which do not result in a configuration change
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# Reliability Requirements BPM

PRR	PRR Title	Stage
1243	Energy storage and distributed energy resources 3 proxy demand resource	Initial
1239	Stabilization of maximum import capability baseline calculation	Recommendation
1237	Removal of reference to outage management BPM section 4.5 for 1122 appeals decision	Recommendation

# PRR 1243 – Energy storage and distributed energy resources 3 proxy demand resource

- Reason for revision
  - The reason for the revision was to introduce a new a type of proxy demand resource (PDR) – Load shift resource load curtailment stemming from ESDR3B.
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

## PRR 1239 – Stabilization of maximum import capability baseline calculation

- Reason for revision
  - Changes are required in order to provide an enhanced level of MIC stabilization from one year to the next and the proposal is the final result of the Maximum Import Capability Stabilization and Multi-Year Allocation stakeholder initiative as available in the Revised Straw Proposal posted March 12, 2020.
- Recommendation comments:
  - No comments submitted
- Recommendation comment period expired:
  - May 19, 2020
- Next step:
  - Post final decision

## PRR 1237 – Removal of reference to outage management BPM section 4.5 for 1122 appeals decision

- Reason for revision
  - This emergency implementation is due to PRR 1122 Appeal Committee Decision.
- Recommendation comments:
  - No comments submitted
- Recommendation comment period expired:
  - May 19, 2020
- Next step:
  - Post final decision

# Transmission Planning Process BPM

PRR	PRR Title	Stage
1241	Revision to update electromagnetic transients modeling requirements in Section 10	Initial

# PRR 1241 – Revision to update electromagnetic transients modeling requirements in Section 10

- Reason for revision
  - Revision to update the EMT modeling requirements for generator models
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation

# Congestion Revenue Rights BPM

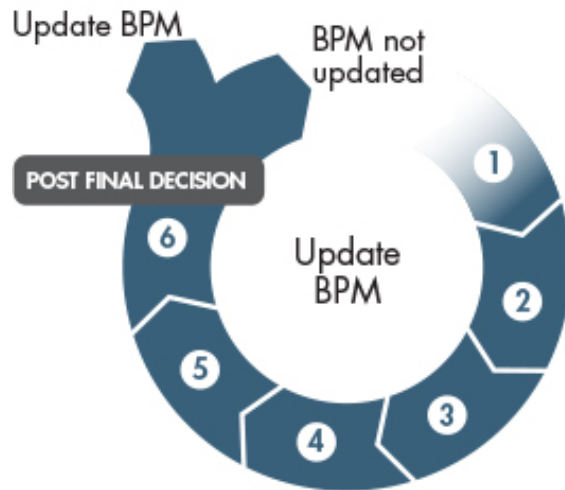
PRR	PRR Title	Stage
1240	Congestion revenue rights clarifications	Recommendation



# PRR 1240 – Congestion revenue rights clarifications

- Reason for revision
  - The purpose of this PRR submission is to add additional clarification to sections 7.2.2, 7.3.1, 7.3.2.2.5 and Attachment J
- Recommendation comments:
  - No comments submitted
- Recommendation comment period expired:
  - May 19, 2020
- Next step:
  - Post final decision

# Next BPM PRR Review Monthly Meeting: June 23, 2020 @ 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:

Nicole Hines

916-608-5862

[BPM\\_CM@caiso.com](mailto:BPM_CM@caiso.com)