



Provisioning Access to Customer Interface for Resource Adequacy (CIRA)

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Customer Readiness

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Agenda



- Provisioning access to CIRA with new LSE IDs

Definitions

Abbreviation/Term	Definition
AIM	Access and Identity Management
CIRA	Customer Interface for Resource Adequacy
EIM	Energy Imbalance Market
LRA	Local Regulatory Authority
LRA ID	Local Regulatory Authority Identifier
LSE	Load Serving Entity
LSE ID	Load Serving Entity Identifier
MPP	Market Participant Portal
POC	Point of Contact
RC	Reliability Coordinator
UAA	User Access Administrator



PROVISIONING ACCESS TO CIRA

Who Should Attend This Training?

- 3 Phases Energy Services
- APX
- Arizona Electric Power Cooperative
- BP Energy
- Calpine Energy
- California Department of Water Resources
- City of Anaheim
- City of Azusa
- City of Banning
- City of Cerritos
- City of Corona
- City of Lancaster
- City of Pasadena
- City of Riverside
- City of Vernon
- Colton Public Utility
- Commercial Energy of Montana
- Constellation New Energy
- Direct Energy
- Eastside Power Authority
- EDF Industrial Power Services
- EDMS
- Liberty Power Holdings
- NCPA
- PALMCo Power CA
- PG&E
- Pilot Power
- Rancho Cucamonga Municipal Utility
- SDG&E
- Shell Energy
- Silicon Valley Power
- SCE
- Tenaska
- The Energy Authority
- WAPA
- Valley Electric Association
- ZGlobal

What is Resource Adequacy?



Forward planning and procurement process to ensure sufficient capacity is made available to the ISO markets in the right places and at the right times.

- The ISO ensures sufficient resources are available to the balancing authority to provide safe and reliable operation of the grid in real-time

Procurement by Load Serving Entities

- Load serving entities (LSEs) have procurement targets:

Annual

Monthly

- LSEs “contract” for supply
 - *Some market participants are both the LSE and Supplier*
- Each month, the ISO determines if LSEs have met their:
 - Overall System Requirement
 - Local Requirement in each local area it serves load
 - Flexible Requirement

Overview of LSE ID changes in the CIRA application

- CIRA will begin to source its list of LSE IDs from Master File
- This update requires changes to access provisioning to prevent the loss of access to upload resource adequacy (RA) plans in CIRA
- UAAs should provision your LSE ID (NOT SCID or LRA ID) for one of the following roles:
 - EXTERNAL RA READ-ONLY
 - EXTERNAL RA READ-WRITE
- *The ISO will:*
 - Contact and assist UAAs in impacted organizations to reprovision users to the new LSE IDs
 - Assist in validating that organizations have been reprovisioned prior to go-live to prevent loss of access to data within CIRA

In a Nutshell...

Individuals who submit resource adequacy (RA) plans in CIRA for a load serving entity (LSE) will need to have the correct role and “entity” (LSE ID) assigned in AIM or they will not be able to access and/or upload RA plans in CIRA.



What Are Your Changes?

NCPA - Alameda Municipal Power	Anaheim, City of	PALMco Power CA, LLC	3 Phases Renewables LSE
APX - Bear Valley Electric Services	Arizona Electric Power Cooperative, Inc.	Shell - Port of Stockton	Shell - City of Cerritos LSE
WAPA - Bureau of Reclamation LWPUL	California Department of Water Resources	Rancho Cucamonga Municipal Utility	City of Corona LSEA
WAPA - Bureau of Reclamation-LWSLW	Calpine Energy Services	Direct Energy - Rancho Mirage Energy Authority	City of Vernon LSE
APX - CCSF (Power Enterprise of the S F Pub Util)	City of Azusa	Riverside, City of	Constellation NewEnergy, Inc. LSE
BP Energy - Clean Power SF	City of Banning	Silicon Valley Power (SVP) City of Santa Clara	Direct Energy Business LSE
EDF Industrial Power Services (CA), LLC	Direct Energy - City of Industry	Arizona Electric Power Cooperative- The Metropolitan Water District of Southern Ca	LSE Eastside Power Authority LSE
WAPA - Lassen Municipal Utility District	City of Lancaster	Shell - Town of Apple Valley LSE	Pacific Gas & Electric LSE
Tenaska - Moreno Valley Utility	City of Pasadena	Valley Electric Association, Inc.	Pilot Power Group, Inc. LSE
WAPA - NASA	Clean Power of Southern California	Zglobal - Victorville Municipal Utilities Services	San Diego Gas & Electric LSE
Calpine - Noble Americas Energy Solutions LLC	Colton Public Utilities		Shell Energy North America LSE
Direct Energy - Pico Rivera Innovative Municipal Energy	Commercial Energy of Montana		Southern California Edison Company LSE1
EDMS - Tiger Natural Gas, Inc.	Pilot Power - King City Community Power		
WAPA - US Department of Energy	Liberty Power Holdings, LLC		

Group A - Red

Organization	LSE ID	Scheduling Coordinator
Alameda Municipal Power	LNCPA	Scheduled by: NCPA
Bear Valley Electric Services	LBVES	Scheduled by: APX
Bureau of Reclamation-LWPUL	LWPUL	Scheduled by: WAPA
Bureau of Reclamation-LWSLW	LWSLW	Scheduled by: WAPA
CCSF (Power Enterprise of the S F Pub Util)	LCCSF	Scheduled by: APX
Clean Power SF LSE	LCPSF	Scheduled by: APX
EDF Industrial Power Services (CA), LLC	LEDF	Scheduled by: EDF
Lassen Municipal Utility District	LWFLS	Scheduled by: WAPA
Moreno Valley Utility	LSEMV	Scheduled by: Tenaska
NASA	LWNAS	Scheduled by: WAPA
Noble Americas Energy Solutions LLC	LSEES	Scheduled by: Calpine
Pico Rivera Innovative Municipal Energy	LPICO	Scheduled by: Direct Energy
Tiger Natural Gas, Inc.	LTNGI	Scheduled by: EDMS, LLC
US Department of Energy	LWDOE	Scheduled by: WAPA

Group A - Red

- **Your LSE organization is not currently located in the CAISO AIM (Access and Identity Management) tool**
- **Your actions:**
 1. LSE/SC Organization must determine who they would like to designate as UAA (can be from LSE or SC)
 2. Identified UAA (either from LSE or SC) submits UAA form to add UAA AND add correct LSE ID
 3. SC UAA endorses users over to LSE organization in AIM (*after UAA form processing*)
 4. LSE UAA (whoever identified in step 1) provisions CIRA RA read/write access for those submitting RA plans (*after UAA form processing*)

Note: Although not likely, if the LSE organization plans on submitting their own RA plan moving forward, step 3 does not apply.

Group B - Yellow

Organization	LSE ID	Scheduling Coordinator
Anaheim, City of	LANHM	Scheduled by: City of Anaheim
Arizona Electric Power Cooperative, Inc.	LAZCO	Scheduled by: Arizona Electric Power Cooperative, Inc.
California Department of Water Resources	LCDWR	Scheduled by: California Department of Water Resources
Calpine Energy Services	LCALP	Scheduled by: Calpine
City of Azua	LAZUA	Scheduled by: City of Azusa
City of Banning	LBAN1	Scheduled by: City of Banning
City of Lancaster LSE	LANC	Scheduled by: Direct Energy
City of Pasadena	LPASA	Scheduled by: City of Pasadena
Clean Power of Southern California	LLACC	Scheduled by: Clean Power of Southern California
Colton Public Utilities	LCLTN	Scheduled by: Shell
Commercial Energy of Montana	LCEM1	Scheduled by: Commercial Energy of Montana Inc.
King City Community Power	LKING	Scheduled by: Pilot Power
Liberty Power Holdings, LLC	LLPH	Scheduled by: Liberty Power Holdings, LLC

Organization	LSE ID	Scheduling Coordinator
		Scheduled by: PALMco Power CA, LLC
PALMco Power CA, LLC	LPALM	
Port of Stockton	LPSTN	Scheduled by: Shell
Rancho Cucamonga Municiple Utility	LRCMU	Scheduled by: City of Rancho Cucamonga
Rancho Mirage Energy Authority (LSE)	LRMEA	Scheduled by: Direct Energy
		Scheduled by: City of Riverside
Riverside, City of	LRVSD	
		Scheduled by: City of Santa Clara, dba Silicon Valley Power
Silicon Valley Power (SVP) City of Santa Clara	LSNCL	
		Scheduled by: Arizona Electric Power Cooperative, Inc. - AMWD
The Metropolitan Water District of Southern Ca LSE	LMWSC	
		Scheduled by: Shell
Town of Apple Valley LSE	LTOAV	Scheduled by: Valley Electric Association, Inc.
Valley Electric Association, Inc.	LVBOB	
Victorville Municipal Utilities Services	LVICT	Scheduled by: ZGlobal

Group B - Yellow

- Your LSE organization is in AIM but a UAA and/or the correct LSE ID needs to be added to your LSE organization's profile
- Your actions:
 1. LSE/SC organization must select UAA for LSE **if not already done** (whether from their own organization or from SC)
 2. Identified UAA (either from LSE or SC) submit UAA form to either: identify UAA **AND/OR** add correct LSE ID. Signatory must be from the LSE.
 3. SC UAA endorses users over to LSE organization in AIM (after UAA form processing)
 4. LSE UAA should provision CIRA RA read/write access for those submitting RA plans (after UAA form processing)

Note: If your organization is your own SC and submits your own RA plans, step 3 does not apply to you.

Submitting a UAA Form

California ISO

ABOUT US PARTICIPATE STAY INFORMED PLANNING MARKET & TRANSMISSION

Resource Interconnection Guide
Scheduling Coordinator
Energy Imbalance Market
Generation
Demand Response and Load
Distributed Energy Resource Provider
Dynamic Transfers
Storage
Metered Subsystem

Transmission
Utility Distribution Company
Metering and Telemetry
Market Products
Application Access
Learning Center

Home > Participate > Application access

Application access

Confidential information and data communicated between the ISO and its participants during the course of planning and market activities are protected through robust system and application security. Find access requirements as well as application technical specifications and user information here.

Featured documents

- ISO Production Maintenance and Outage Schedule 1/12/2021 13:14
- Daylight Saving Time Long Day Information 10/23/2020 16:09
- Daylight Saving Time Short Day Information 2/28/2020 14:05
- ISO Secure File Transfer Protocol (SFTP) Provisioning and Setup Procedure 7/09/2018 10:45
- Application Access Request Form Reference Guide 10/24/2018 10:01
Instructions on which request form to use, and how to complete and submit.
- Digital certificates Digital certificates and instructions.
- Application access request forms

User access administrator guide

Customers must designate one or more user access administrators (*formerly points of contact*) to manage the process of requesting user access to ISO applications. Please use the web-based agreement form below to submit a designation. Refer to the [User access administrator guide](#) for step-by-step process and forms. Questions? Contact UAARquests@caiso.com.

- User Access Administrator Agreement Online form to designate a user access administrator.
- ISO User Access Administrator Establishment and Requirements 12/07/2020 10:24

Submitting a UAA Form

User Access Administrator Agreement

Online form to designate a user access administrator. IMPORTANT: For UAA submissions for Non-Disclosure Agreements, the NDA MUST be in place prior to submission of this form.

Please enter company full legal name and email address of person completing this form.

Your Role:
Company Full Legal Name *

Your Name:

Your Email:

Please provide the name and email address of the individual authorized to sign this Agreement on behalf of the legal company above. Once you have completed this Agreement they will receive an email invitation to sign. If you are authorized to sign, enter your name and email address below.

Role
Company Authorized Signer *

Name:

Email:

[Begin Signing](#)

Email of UAA request submitter

Name of LSE Organization

Email of LSE or SC Signatory (*whoever is currently provisioning access to submit RA plans in CIRA*)

Name of LSE or SC Signatory (*whoever is currently provisioning access to submit RA plans in CIRA*)

Submitting a UAA Form

Please Review & Act on These Documents



CAISO UAA Requests
California ISO UAA Requests

PRIVATE MESSAGE: Please complete the User Access Administrator Agreement and hit FINISH to send to the Authorized Signer you identified. Note that the FINISH button will not be available until you have properly completed all required fields.

[View More](#)

Please review the documents below.

CONTINUE **FINISH LATER**

Any business changes that impact the scope, areas of responsibility, or individuals assigned as UAAs must be communicated to ISO by one of the existing UAAs or another authorized company representative.

Submitter Contact Information

Full Name: Phone Number:

Email Address:

Company Information

Full Legal Name: Main Phone Num:

Address, City, State, Zip Code:

Please check box, if your company has not yet established an agreement with the I...
Please indicate if you are in the application process for any of these business type(s) to establish your UAAs and gain AIM access.

Click "Continue"

Submitting a UAA Form

DocuSign Envelope ID: C39061FD-C5D5-4174-8822-AABF3A70D592



User Access Administrator Agreement

Instructions

This form is to establish external User Access Administrators (UAAs) that will be responsible for provisioning access to ISO applications and systems. **A company representative with an appropriate level of authority per the company's risk management must complete this form.** Ensure that all new UAAs review the [ISO User Access Administrator \(UAA\) Requirements](#) document posted on the ISO website to understand specific responsibilities associated with this function. Once the form is completed, it is their responsibility to coordinate and validate the user's identity and access requirements.

Any business changes that impact the scope, areas of responsibility, or individuals assigned as UAAs must be communicated to ISO by one of the existing UAAs or another authorized company representative.

Submitter Contact Information

Full Name:

Phone Number:

Email Address:

Company Information

Full Legal Name:

Main Phone Number:

Address, City, State, Zip Code:

**Submitter
information**

**LSE
information**

Selecting a UAA

CRR Holder Energy Imbalance Market

Remove existing UAA / Name:

Add New UAA Information:

Name: Title:
Phone Number: Email Address:

Check the appropriate box(es) below for new access or new business types, matching the ISO agreements currently in place, and provide the IDs (SCID, Project ID, etc.). If you require additional space when entering IDs, please see page 3. If in doubt, contact UAARRequests@caiso.com before completing the form to avoid rejected submissions.

Basic UAA (Market Participant Portal only)
 Scheduling Coordinator Agreement (for SCs in the physical market)
 Commercial Bidder Agreement (for SCs in the financial market)

Enter UAA selection here
(this can be LSE or SC)

Selecting Access on UAA Form

Phone Number: _____ Email Address: _____

Check the appropriate box(es) below, and provide the IDs (SCID, PSCID, etc.) for each business type, matching the ISO agreements currently in place, and provide the IDs (SCID, PSCID, etc.) for each business type, matching the ISO agreements currently in place, and provide the IDs (SCID, PSCID, etc.) for each business type, matching the ISO agreements currently in place. If in doubt, contact [UAARequests@caiso.com](#). Use the additional space when entering IDs, please see page 3. Do not use the form to avoid rejected submissions.

Select "Basic UAA"

Select "CIRA only" to submit RA plans

- Basic UAA (Market Participant Resource Only)
- Scheduling Coordinator Agreement (for SCs in the physical market)
- Convergence Pricing Agreement (for SCs in the financial market only)
- Congestion Revenue Rights Entity Agreement
- CIRA only (for Load Serving Entities to submit RA plans) List LSE ID(s):
- CIRA only (for Local Regulatory Authorities)
- Demand Response
- EIM Entity Scheduling Coordinator
- EIM Participating Resource Scheduling Coordinator
- Adjacent Reliability Coordinator
- Reliability Coordinator (RC) Customer Transmission Operator
- Reliability Coordinator (RC) Customer Balancing Authority
- Transmission Owner
- RIMS for Interconnection Customers

(Enter only project codes. Do not enter resource IDs. Please attach project code confirmation email for new project if applicable.)

Enter LSE ID here

Signing the UAA Form

For In-connection Customers

(Enter only project codes. Do not enter resource IDs. Please attach project code confirmation email for new project if available. This will help to expedite the validation process.)

RIMS for PTOs (no project codes required)

Non-Disclosure Agreements:

Note: A Non-Disclosure Agreement is required for access to the following applications. Do not complete this section unless an NDA is confirmed by CAISONDA@caiso.com or this submitted UAA form will be rejected:

Transmission Planning Access CRR FNM Access Protected Data/Market Modeling Data only (i.e. transmission constraints)

Signing this form warrants that the above listed individuals is are authorized User Access Administrators to review, provision and remove user access to ISO applications and systems for their designated areas of responsibility per the company's risk management policies. Additionally, all associated requirements contained in the [ISO User Access Administrator \(UAA\) Requirements](#) document are understood by the signing representative, as well as the designated User Access Administrators.

LSE Company

Signed

Name
Date

**Name of LSE is
automatically populated
from "Company" field**

Submitting UAA Form

an NDA is confirmed by CAISONDA@caiso.com or this submitted UAA form will be rejected:

Transmission Planning Access CRR FNM Access Protected Data/Market Modeling Data only (i.e. transmission constraints)

Signing this form warrants that the above listed individuals is are authorized User Access Administrators, provision and remove user access to ISO applications and systems for their designated areas of management policies. Additionally, all associated requirements contained in the document are understood by the signing representative, as well as the designated

LSE Company

Signed _____ Name _____ Date _____

[\(UAA\) Requirements](#)

Click "Finish"

Group C - Orange

Organization	LSE ID	Scheduling Coordinator
3 Phases Renewables LSE	LTPES	Scheduled by: 3Phases Energy Services
City of Cerritos LSE	LCER	Scheduled by: Shell
City of Corona LSE	LCOR	Scheduled by: City of Corona, CA
City of Vernon LSE	LVERN	Scheduled by: City of Vernon
Constellation NewEnergy, Inc. LSE	LNEI1	Scheduled by: Constellation NewEnergy, Inc.
Direct Energy Business LSE	LSEL1	Scheduled by: Direct Energy
Eastside Power Authority LSE	LEPA	Scheduled by: Eastside Power Authority
Pacific Gas & Electric LSE	LPGE	Scheduled by: PG&E
Pilot Power Group, Inc. LSE	LPIPO	Scheduled by: Pilot Power
San Diego Gas & Electric LSE	LSDGE	Scheduled by: SDG&E
Shell Energy North America LSE	LCRLL	Scheduled by: Shell
Southern California Edison Company LSE1	LSCE	Scheduled by: Southern California Edison Company

Group C - Orange

- **Your LSE ID is already attached to your organization in AIM but CIRA users may be using the incorrect ID when uploading RA plans in CIRA**
- Your actions:
 1. LSE UAA should go into AIM to verify if staff who are submitting RA plans in CIRA have the correct RA read/write role with the correct LSE ID
 2. Change old CIRA access provisioned IDs to “Read ONLY” role
 - UAA **should not** remove incorrect ID from CIRA provisioning otherwise previously submitted plans will not be viewable
 - “Read ONLY” role will allow users to see previous RA plans submitted without accidentally submitting new RA plans through the wrong ID

LSE Plan Submittal Clarifications

- Clarification on expectations for the new Load Serving Entity IDs (LSE IDs) for LSE Plans:
 - All LSE RA plans going forward are to be represented under the new LSE ID
 - Supply plans should also reference the new LSE ID's in the RA Capacity tab, Column I in the CIRA application.
 - Anyone submitting a supply plan will now need to reflect the new LSE ID on their plan or it will be rejected by CIRA

LSE Plan Submittal Clarifications

Please note that if you also represent generation as a Supplier, you will need to make sure that your users are also provisioned for the “External RA Read-Write” role for the applicable SCID. Having this role allows your users to upload supply plans and submit forced substitutions. In addition, we recently posted a knowledge article in CIDI “Access Role Definitions in CIRA”, which contains an explanation for each role type for further clarification.



LSE ID vs. LRA ID

- **LSE ID = Lxxxx**

- Should be provisioned to this role in order to submitted RA plans

EXTERNAL RA READ-WRITE

- **LRA ID = LRxxxx**

- Should be provisioned to this role in order for the Local Regulatory Authority (LRA) to upload credits and view deficiencies for their LSEs
- NOTE: This is used when the LRA is not the CPUC

EXTERNAL LRA WRITE

Checking ID Access to CIRA in AIM

https://portal.caiso.com/aim/logon.do

California ISO Access and Administration

Users Applications Point of Contacts Certification Renewal Access Request Administration RIMS Agreement Approval

Application: CIRA Customer Interface for Resource Adequacy
Role: [ALL] Environment: [ALL]
Organization: [] Entity: [] Account Type: [ALL]

Users: [Endorsed]

Applications

Application	Environment	Entity	Role	Organization	First Name	Last Name	User Id	Email
CIRA	PROD	TPES	EXTERNAL OFFER READ-WRITE					
CIRA	MAP-STAGE	TPES	EXTERNAL OFFER READ-WRITE					
CIRA	PROD	LTPES	EXTERNAL RA READ-WRITE					
CIRA	PROD	TPES	EXTERNAL RA READ-WRITE					
CIRA	PROD	TPES	EXTERNAL RA READ-WRITE					
CIRA	PROD	TPES	EXTERNAL SUPPLIER WRITE					

Next Steps

- Submit any needed UAA forms (Group A – Red and Group B – Yellow)
- Attend the “group” training that will be set up to assist with this process
 - Your customer rep will follow up with date and time
- Tentative go live date: ***mid-February***

**Group A – Red
CIRA Provisioning
Walkthrough**

Date: TBD

**Group B – Yellow
CIRA Provisioning
Walkthrough**

Date: TBD

**Group C – Orange
CIRA Provisioning
Walkthrough**

Date: TBD

Questions?



Thank you for your participation!

For more detailed information on anything presented, please
visit our website at:

www.caiso.com

Or send an email to:
CustomerReadiness@caiso.com