

 <b>California ISO</b> <small>Shaping a Renewed Future</small>	<b>Operations</b>	<b>Process No.</b>	
<b>Procedure: Station Power Portfolio Application</b>	<b>Version No.</b>	2.0	
	<b>Effective Date</b>	4/1/2006	
	<b>Distribution Restriction:</b>	None	

**Overview**

**Introduction**

FERC has established a policy that allows a single corporate entity that owns one or more Generating Units to self-supply Station Power over a monthly netting period using Energy generated on-site or remotely. Through the CAISO Station Power Protocol, Generators can convert their Station Power from retail service to wholesale service.

Station Power under the Station Power Protocol may be supplied in three ways:

- § On-Site Self-Supply: Energy from a Generating Unit that is deemed to have self-supplied all or a portion of its associated Station Power load without use of the ISO Controlled Grid during the Netting Period.
- § Remote Self Supply: Positive Net Output from generating resources in the Station Power Portfolio that is deemed to have self-supplied Station Power load of other Generating Units in the Station Power Portfolio during the Netting Period, where such self-supply requires use of the ISO Controlled Grid.
- § Third Party Supply: Energy that is deemed to have been purchased from third parties to supply Station Power load during the Netting Period.

To be eligible to self-supply Station Power, a generator owner must apply for a Station Power Portfolio and the configuration of the Station Power Portfolio must be approved by the CAISO. This document describes the Station Power Portfolio Application process. More information on the Station Power program is provided in the Station Power Program Overview document located on the CAISO website.

**In this Procedure**

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**Roles and Responsibilities**

<b>Implementer</b>	<b>Role and Responsibility</b>
Owner-Applicant	<ul style="list-style-type: none"> <li>§ Submit Station Power application for new or updates to existing Portfolios, including all required documentation.</li> <li>§ Notify the CAISO Station Power Coordinator of any changes to the application in a timely manner.</li> <li>§ Promptly respond to inquiries from the CAISO Station Power Coordinator or Technical Review Team.</li> <li>§ Coordinate with the current provider of standby service to change the terms of that service as needed when the Station Power Portfolio is approved.</li> </ul>
CAISO Station Power Coordinator	<ul style="list-style-type: none"> <li>§ Promptly review all Station Power applications for completeness.</li> <li>§ Take necessary steps to move the application through the CAISO Station Power process in a timely manner.</li> <li>§ Promptly respond to inquiries from the Owner-Applicant.</li> <li>§ Notify the Owner-Applicant of the progress of their application at appropriate times during the CAISO Station Power process.</li> </ul>
CAISO Technical Review Team	<ul style="list-style-type: none"> <li>§ Promptly review all completed Station Power applications</li> <li>§ Promptly notify the Owner-Applicant of any questions/ concerns with the application that could be solved during the review process.</li> </ul>
CAISO Contract Implementation Team	<ul style="list-style-type: none"> <li>§ Begin coordination of CAISO system implementation of the approved Station Power Portfolio in a timely manner.</li> <li>§ Notify the CAISO Station Power Coordinator of implementation progress at appropriate times during the process.</li> </ul>

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Terminology

Term	Definition
Station Power	Energy for operating electric equipment, or portions thereof, located on the Generating Unit site owned by the same entity that owns the Generating Unit, which electrical equipment is used exclusively for the production of Energy and any useful thermal energy associated with the production of Energy by the Generating Unit; and for the incidental heating, lighting, air conditioning and office equipment needs of buildings, or portions thereof, that are owned by the same entity that owns the Generating Unit; located on the Generating Unit site; and used exclusively in connection with the production of Energy and any useful thermal energy associated with the production of Energy by the Generating Unit. Station Power includes the Energy associated with motoring a hydroelectric Generating Unit to keep the unit synchronized at zero real power output to provide Regulation or Spinning Reserve. Station Power does not include any Energy used to power synchronous condensers; used for pumping at a pumped storage facility; or provided during a Black Start procedure. Station Power does not include Energy to serve loads outside the ISO Control Area.
Station Power Portfolio	One or more generating resources eligible to self-supply Station Power, including Generating Units in the ISO Control Area, and generating facilities outside the ISO Control Area, all of which are owned by the same entity.

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Before you begin

Step	Action	If Not...
1	<b>Complete</b> Application and submit hardcopy to: California ISO Model & Contract Implementation 250 Outcropping Way Folsom, CA 95630	
2	<b>Send</b> the non-refundable \$500 application fee (per Portfolio) to the CAISO in one of two ways: Ø Wire or Ø Check with Application Form  <b>Note:</b> If an invoice is required, please submit your request to the Station Power Coordinator via the Station Power mailbox.  For wiring instructions, contact the Station Power Coordinator at <a href="mailto:stationpower@caiso.com">stationpower@caiso.com</a>	The application will be put on hold until the application fee is received & verified.
3	<b>Ensure</b> one-line diagrams are completed in PDF format, and ready to attach to the Station Power application.	The application will be put on hold.
4	<b>Gather</b> other necessary Generating and Load Resource information for completing the Station Power application: <ul style="list-style-type: none"> <li>• Resource IDs and Resource Names.</li> <li>• Meter Device ID associated with each Resource.</li> <li>• Local UDC associated with each Generating Facility</li> <li>• Identify current standby service provider as third party supplier.</li> <li>• Identification of Local Regulatory Authority</li> </ul>	The application will be put on hold until all required information is received.
5	<b>Complete</b> the checklist at the end of the Station Power application prior to submitting to the CAISO.	Any missing information will delay processing.

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**Station Power Application**

**Station Power Portfolio Criteria**

Station Power Portfolios are subject to the following:

	Criteria
<b>1</b>	Only Station Power loads associated with Generating Resources within the CAISO Control Area may provide Self-Supply in accordance with the Station Power Protocol in the CAISO Tariff.
<b>2</b>	Each Generating Resource must be a part of a PG/MSA, QF PGA, or MSS agreement. Likewise, each Station Power meter must be subject to a Meter Service Agreement ("MSA") for CAISO Metered Entities.
<b>3</b>	Any Generating facility outside the CAISO Control Area owned by the same Corporate Entity is eligible to provide Remote Self-Supply to Station Power loads, with the following conditions: § Imports must be scheduled using an Interchange ID specified by the CAISO. § Import schedules using such Interchange ID do not exceed the available output of such Generating facilities in any given hour. § Firm Transmission service to a Tie Point within the CAISO Control Area is secured. § Meter data for these Generating facilities shall be subject to CAISO audit to verify performance in accordance with the above requirements.
<b>4</b>	Station Power may be self-supplied by a single corporate entity, joint powers agency, or other legal entity organized under the laws of the State of California. <b>Note:</b> A Station Power Portfolio must <u>not</u> include any facilities owned by the Owner's corporate affiliates. The Owner-Applicant must be the sole owner of the Generating Units, or must be able to demonstrate the right to call on Energy for its own use for jointly owned units.
<b>5</b>	Each Station Power meter must be certified in accordance with the CAISO Tariff and all end uses served must meet the definition of Station Power.

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Station Power Application, Continued

Station Power Portfolio Criteria continued

	Criteria
<b>6</b>	<p>All load served by each Station Power meter must be consistent with the definition of Station Power, and any ineligible load must have appropriate retail metering in place.</p> <p><b>Note:</b> Under no circumstances may ineligible loads be served through a Station Power meter.</p>
<b>7</b>	<p>Each Station Power meter must be installed per the CAISO Metering Guidelines located at: <a href="http://www.caiso.com/Documents/G001-NewMeterInstallations.pdf">http://www.caiso.com/Documents/G001-NewMeterInstallations.pdf</a></p> <p><b>Note:</b> This criterion can be in progress or completed at the time of application submittal. If installation is in progress and the application is complete the application will be put on-hold until the meter installation is complete and certified by a CAISO meter engineer. Once the meter installation is certified, the application will be reviewed for approval and implementation into CAISO systems.</p>
<b>8</b>	<p>The Owner-Applicant must have arranged terms of service with the responsible UDC for the use of any distribution facilities required to self-supply Station Power.</p>
<b>9</b>	<p>A single Scheduling Coordinator must be assigned to both the On-Site Self-Supply and Remote Self-Supply Load ID associated with each Station Power meter.</p>

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**Required Application Documentation**

A completed Station Power Application Form includes:

Step	Documentation
1	Name and address of the corporate entity that owns the Generating Facility.
2	The name and address of the Generating Facility.
3	Scheduling Coordinator (SC) for the Owner-Applicant. <b>Note:</b> A single Scheduling Coordinator must represent the unique load identifier assigned by the CAISO for On-Site self-supply and Remote Self-Supply associated with each Station Power meter. Generation sources in a Station Power Portfolio may have different Scheduling Coordinators, but all generation and load resources in a Station Power Portfolio must be owned by the same corporate entity.
4	Contact information for owner-applicant representative and a contact for technical questions regarding the contents of the application.
5	Resource ID and Resource Name of each Generating and Load Resource included in the Station Power Portfolio. <b>Note:</b> The CAISO Master Control Area Generating Capability List is located at: <a href="http://www.caiso.com/14d4/14d4c4ff59780.html">http://www.caiso.com/14d4/14d4c4ff59780.html</a> and can be used to determine the appropriate CAISO Resource ID for Generating Units.
6	ISO Meter Device ID for all existing meters.
7	Description of what is metered at that location (ex. generation or station power load). Please also indicate which Generating Units will be a source of Remote supply.
8	In the Description, also identify any generating facilities outside the ISO Control Area to be used to provide Remote Self-Supply of Station Power within the Station Power Portfolio. No loads associated with generating facilities outside the control area may be self-supplied under this Station Power Program.
9	Identification of the current UDC, Energy Service Provider, or MSS Operator of standby service. This provider will represent the Third Party Supply.

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**Station Power Application, Continued**

**Required Application Documentation continued**

Step	Documentation
10	Identification of the Local Regulatory Authority.
11	One-line diagrams of all Generating Units and Station Power meters for the

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	<p>Portfolio over which Station Power is proposed to be self-supplied.</p> <p><b>Requirement:</b> The one-line diagram(s) must be clear and in <u>pdf format</u>. They must clearly show the location and ownership of all Generating Units and Station Power meters, their connection to the CAISO-Controlled Grid and/or distribution system, and the status of breakers and switchgears for normal system operation.</p> <p>Also, the one-line diagrams should include:</p> <ul style="list-style-type: none"> <li>§ A legend describing all figures used in the diagram</li> <li>§ Date and current drawing revision number</li> <li>§ All wiring, connections, and devices in the circuits</li> <li>§ The point of delivery of energy to the ISO and all relevant information about current transformers and voltage transformers that include line and transformer loss compensation</li> <li>§ The operation of the ISO meters input and output circuits</li> </ul> <p><b>Note: The ISO shall retain copies of these input/output circuits for future audit activities.</b></p>
<b>12</b>	<p>Station Power Portfolio Overview – A narrative describing the proposed configuration of the Station Power Portfolio along with a description overview of the facility. This overview should include a brief description of the operation of the site such as the meters installed, description of communication circuit, the size of generation and station power load, and identify load connection with distribution or transmission grid.</p> <p>Additionally, list any other information that requires special consideration and that would introduce the site and operation to an outsider.</p>

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Timeline

Timeline	Actions
<b>Important – Effective Dates</b>	Station Power applications <u>must be implemented and or updated</u> with an effective date beginning on the <u>1<sup>st</sup> of the month</u> .
Application is Received	When a new application is received the Station Power Coordinator reviews the application for completeness and communicates to the applicant/owner that the application has been received. The 10-day timeline begins.
The First 10 Business Days	<p>The following actions will take place within the first 10 business days following a submitted Station Power Portfolio Application:</p> <ul style="list-style-type: none"> <li>§ The CAISO Station Power Coordinator will determine if all required information, including the application fee, has been received by the CAISO.</li> <li>§ The CAISO Station Power Coordinator will provide the contents of the application to the Local Regulatory Authority.</li> <li>§ The CAISO Station Power Coordinator will provide the contents of the application to the applicable UDC, MSS Operator, or Energy Service Provider.</li> <li>§ The CAISO Station Power Coordinator will verify if CAISO contract documentation is complete or in progress.</li> <li>§ The CAISO Technical Review Team will perform an initial review to determine if the application contains the appropriate documentation to support the proposed Station Power Portfolio.</li> </ul>

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Timeline continued

Station Power Portfolio Approval and Systems Implementation: 20 Business Days	<p>Following a completed application where all additional work related to meter installation, contract revisions, or coordination with other entities is completed, the following actions will take place:</p> <ul style="list-style-type: none"> <li>§ The CAISO Technical Review Team will approve or reject a Station Power Portfolio configuration.</li> <li>§ The CAISO Contract Implementation Team will determine the earliest effective Trade Date for the Station Power Portfolio implementation into the CAISO systems.</li> <li>§ The CAISO Station Power Coordinator will notify the owner-applicant of the proposed effective Trade Date.</li> <li>§ The owner-applicant must approve the proposed Trade Date or suggest a later date.</li> <li>§ The CAISO Contract Implementation Team will coordinate the implementation of the approved Station Power Portfolio into CAISO systems.</li> <li>§ The CAISO Station Power Coordinator will notify the owner-applicant of the new Station Power load resource IDs once they are created.</li> </ul>
<u><b>Important Note:</b></u>	<p>If all documentation is complete for the Station Power application, but meter installation and certification, contract revisions, or coordination with the relevant utility or energy service provider are still needed, the application status will be deemed complete, but on-hold. In this case, the time clock stops until the unresolved issues are completed. The Station Power Portfolio approval and changes to the CAISO systems will <u>not</u> begin until such items are completed. Once these items are resolved and the application is approved, the CAISO will resume implementation and has 20 business days in which to implement a Station Power Portfolio and make the necessary changes to the CAISO systems.</p>

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Station Power Application, Continued

Application Instructions

Implementer	Action
Owner-Applicant	Completes the Station Power application form located at: <a href="http://www.caiso.com/17c8/17c89da01e60.html">http://www.caiso.com/17c8/17c89da01e60.html</a>
	Mails the completed application form to the Station Power Coordinator and sends the \$500 application fee to CAISO as stated in the Before You Begin section of this document.
	Includes all required documentation as outlined in the Required Application Documentation section above and Section II of the Station Power application
	<p><b>Important Note: A separate application must be submitted for each request for a Station Power Portfolio.</b></p> <p><b>An Owner-Applicant can request modification(s) to an existing Station Power Portfolio but must file a new application and submit -refundable \$500 fee for each new update, per portfolio.</b></p>
CAISO Station Power Coordinator	Reviews application(s) and required documentation for completeness.
	If the application is <b>not complete</b> , contacts the Owner-Applicant via email or phone to request the missing information. If the initial application submitted is not complete, the timeline stated above restarts once all required documentation is received and the application is deemed complete.
	If the application is <b>complete</b> , sends the completed application to the: <ul style="list-style-type: none"> <li>• CAISO Technical Review Team for approval/denial.</li> <li>• Local Regulatory Authority</li> <li>• The applicable UDC, Energy Service Provider or MSS Operator</li> </ul>

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Station Power Application, Continued

Application Instructions continued

Implementer	Action
CAISO Technical Review Team	Reviews and approves or denies the application.
<b>If the application is approved...</b>	
CAISO Contract Implementation Team	Determines the earliest possible effective Trade Date for Station Power Portfolio implementation into CAISO systems. <b>Note: The effective Trade Date must begin on the first day of the month.</b>
CAISO Station Power Coordinator	Notifies the Owner-Applicant via email of the suggested effective Trade Date.
Owner-Applicant	Approves or offers another effective Trade Date by responding to the email received from the CAISO Station Power Coordinator. <b>Note: If a new effective Trade Date(s) is requested by the applicant it must be later than the one proposed by the CAISO and be on the first day of a month.</b>
CAISO Contract Implementation Team	Begins coordination of implementation of approved Station Power Portfolio into CAISO systems.
CAISO Station Power Coordinator	Updates the listing of Station Power Portfolios located on the CAISO website with the approved Station Power Portfolio, including: <ul style="list-style-type: none"> <li>• Specific Station Power meter and Generating Units located within the CAISO Control Area and</li> <li>• Any Generating facilities outside of the CAISO Control Area.</li> </ul>
CAISO Station Power Coordinator	Sends the one-line diagrams and narrative for each approved Station Power Portfolio to: <ul style="list-style-type: none"> <li>• The appropriate UDC or MSS Operator and</li> <li>• The Local Regulator Authority.</li> </ul>

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Station Power Application, Continued

Application Instructions continued

Implementer	Action
<b>If the application is denied...</b>	
CAISO Station Power Coordinator	Notifies the Owner-Applicant of the decision within two business days of receipt and asks the Owner-Applicant if they wish to terminate the request or resubmit a revised request.  <b>Note: The CAISO Technical Review Team may suggest alternative Portfolio configurations that it deems feasible and unlikely to adversely impact Grid reliability if it has adequate time and documentation.</b>
Owner-Applicant	Responds to the CAISO Station Power Coordinator with decision to resubmit or terminate request.  <b>Note: If the decision is made at a later date to submit a Station Power Portfolio application that includes any resources in a previously denied application,</b> <ul style="list-style-type: none"> <li>• It will be treated as a new application,</li> <li>• Must comply with the same requirements, and</li> <li>• Follow the same process flow described above.</li> </ul>

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**Version History**

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Version	Update description	Updater	Date
1.7	Add information for terminating a portfolio	Janelle Schultz	10/1/2010
2.0	Update contact information		5/1/2012