



California ISO

# Settlement User Group

June 5, 2024

10:00 a.m. – 11:00 a.m. (Pacific Time)

Web Conference Information	Conference Call Information
<p>Web Address: <a href="https://caiso.webex.com/meet/settlementuser">https://caiso.webex.com/meet/settlementuser</a></p> <p>Meeting Number: 961 854 046</p> <p>Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter your phone number you will use during the call.</p>	<p>US Toll Free: 1-844-621-3956</p> <p>US Toll : 1- 650-479-3208</p> <p>Access Code: 961 854 046</p>
<p>Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publically available on the ISO web page for a limited time following the meeting. The recording, and any related transcriptions, should not be reprinted without the ISO's permission. Hyperlinks in blue in PDF version.</p> <p>The recording will be posted on our website and be available for a short period of time until June 19<sup>th</sup>, 2024. Please mute your phone while the discussion is going on in order to eliminate background noise, to unmute press and hold the spacebar to temporarily unmute, double mute. Calls are structured to stimulate an honest dialogue and engage different perspectives.</p> <p>To ask a question after each topic, unmute yourself before asking your question, or enter question on the chat</p> <p>please state your name and affiliation. Thank you.</p>	



[mute](#)

# Settlement User Group Agenda

Wednesday, June 5, 2024

10:00 a.m. – 11:00 a.m. (Pacific Time)

Time	Topic	Presenter
▪ 10:00 – 10:02	▪ Welcome and Introduction	▪ Massih Ahmadi
▪ 10:02 – 11:00	▪ Settlements	
	▪ Summer 2024 Release	▪ Massih Ahmad
	▪ PRR/BPM	▪ Massih Ahmadi
	▪ NERC/WECC for AY 2025	▪ Derek Lee
	▪ Training	▪ Massih Ahmadi

# 2024 Summer Settlements Release

- Summer Release Completed with activation 6/01/24.
- Below are items in this release:
  - **PRR 1560 for TSMSP:**
    - BPM - PC\_Wheel\_Export\_Quantity\_5.6
  - **PRR 1561 for AS SOC Retro:**
    - BPM - PC RTM Net Amount 5.37.1
    - BPM - PC RTM Net Amount 5.38.1
  - **PRR 1562 for WEIM Pump Storage:**
    - BPM - PC Real Time Energy Quantity
  - **PRR 1563 for AET:**
    - BPM - CC 6476 Real Time Assistance Energy Transfer Surcharge 5.1
    - BPM - CC 6479 Real Time Assistance Energy Transfer Allocation 5.1

# 2024 Summer Settlements Release

- **PRR 1564 for RT Congestion:**
  - BPM - PC Real Time Congestion 5.8
  
- **PRR 1565 for Split Acquired Rights:**
  - BPM - CG PC RA Availability Incentive Mechanism\_5.11
  
- **PRR 1566 for Hybrid TG:**
  - BPM - CG CC 6475 Real Time Uninstructed Imbalance Energy Settlement\_5.7
  - BPM - CG CC 6636 IFM Bid Cost Recovery Tier1 Allocation\_5.5
  - BPM - CG CC 7077 Daily Flexible Ramp Up Uncertainty Award Allocation\_5.5
  - BPM - CG PC Spin Non-Spin No Pay Quantity\_5.24
  - BPM - CG PC Ancillary Services\_5.12
  - BPM - CG CC 7087 Daily Flexible Ramp Down Uncertainty Award Allocation\_5.5

# 2024 Independent Release

- Settlements impacted items in Independent Release:
- Project:
  - **PRR 1559 for TEA:**
    - BPM - CG PC ETC TOR CVR Quantity\_5.9.0a
  - **PRR 1571 for Advisory Shutdown:**
    - BPM - PC Start-Up and Minimum Load Cost\_5.22.0a
- Non-Project:
  - **PRR 1572 for GMC CC4575:**
    - BPM - CG CC 4575 GMC Scheduling Coordinator ID Charge\_5.0g

# PRR/BPM for Summer & Independent Releases

- BPM/PRR:
  - 8 PRRs - **Posted on 3/25**
    - Scheduled to be discussed in **4/23 & 5/21** BPM calls
    - External notification was sent on 3/25
  - 2 Newer PRRs (*PRRs 1571 and 1572*) - **Posted on 4/30**
    - Scheduled to be discussed in **5/21 & 6/25** BPM calls
    - External notification was sent on 4/30
- *Are there issues with us converting draft tech docs and BPM configuration file doc format (word 97-2003) to docx format?*

# NERC/WECC for AY 2025

- The California ISO has posted the North American Electric Reliability Corporation/Western Electricity Coordinating Council (NERC/WECC) information files to the Market Results Interface - Settlements (MRI-S) and the Secure File Transfer Protocol (SFTP) server on June 3, 2024. The files contain the 2023 NERC/WECC metered demand for assessment year 2025 for scheduling coordinator (SC) review, pursuant to ISO tariff section 11.20.4(a).

Item	Value	Unit
Total NERC/WECC Metered Demand for Calendar Year 2023	209,498,742.66	MWh
Estimated Preliminary NERC/WECC Charge Rate for Assessment Year 2025	0.048774698	\$/Mwh

- 2023 NERC/WECC metered demand is the summation of monthly NERC/WECC metered demand quantities published previously in the T+11M recalculation statements for January 2023 through June 2023, and T+70B recalculation statements for July 2023 through December 2023. Details regarding assessment of Charge Code 6490 NERC/WECC Charge are provided in the [Settlements and Billing Business Practice Manual](#) (BPM) configuration guide
- The NERC/WECC information files combined with the market notice published on June 3<sup>rd</sup> shall serve as written notification of each SC's NERC/WECC metered demand for 2023.

# ISO Training Schedule

Training Course	Date and time
Advisory Shutdown BCR Pre-Market Sim Training	June 11, 2024 9:00 am -10:00 am

**New!** Use our [Pre-Training Release Survey](#) to submit topics that you would like to see covered in the upcoming training.

Are you looking for more training?

The ISO Learning Center has computer based training available for lots of topics. Check out the Learning Center: <http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>





# Next SUG Meeting: June 19<sup>th</sup>, 2024 at 10:00 A.M

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# Settlement User Group Calendar 22024

January						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

February						
Su	Mo	Tu	We	Th	Fr	Sa
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March						
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31						

April						
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May						
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June						
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30						

July						
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August						
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September						
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October						
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27	28	29	30	31		

November						
Su	Mo	Tu	We	Th	Fr	Sa
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December						
Su	Mo	Tu	We	Th	Fr	Sa
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Meeting

Holiday

# Settlement User Group

Thank you for participating in our call

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