



Settlement User Group

August 19, 2020

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

Web Conference Information	Conference Call Information
<p>Web Address: https://caiso.webex.com/meet/settlementuser</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 the phone number you will use during the call. You will be called by the conference shortly.</p>	<p>Dial-in Number: (866) 528-2256</p> <p>International Dial-in: (216) 706-7052</p> <p>Access Code: 673 78 64</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 copy.

The recording will be posted on our website and be available for a short period of time until Sept 2, 2020.

Please mute your phone and do not put it on hold while the discussion is going on in order to eliminate background noise. There will be an opportunity to ask questions after each topic, but before asking your question, please state your name and affiliation. Thank you.



Settlement User Group Agenda

Wednesday, August 19, 2020

10:00 a.m. – 11:00 a.m. Pacific Time

Time	Topic	Presenter
▪ 10:00 – 10:05	▪ Welcome and Introduction	▪ Tyler DuBeshter
▪ 10:05 – 11:00	▪ Settlements <ul style="list-style-type: none">– Draft - MSTT Payment Calendar– PRR and BPM Updates– Fall 2020 - Settlement Release Milestones– Fall Release Market Simulation Settlements Calendar– Q4 2020 - Settlement Release Milestones and Scope– CRR 1b Post Implementation Deployment Date	▪ Karen Voong
	▪ Settlement Corner <ul style="list-style-type: none">– EV and Micro Grids	▪ Brenda Corona
	▪ Customer Readiness Spotlight on Training <ul style="list-style-type: none">– Excess Behind the Meter Production	▪ Elizabeth Caldwell
		▪ Assad Al-Baijat
		▪ Elizabeth Caldwell
		▪ Jeremy Malekos
		▪ Peter Klauer
		▪ Rashele Wiltzius

Draft - MSTT Payment Calendar

- In support of Market Settlement Timeline Initiative, an excel version of the draft 2021 CAISO Payments Calendar has been posted to the ISO website.
- The Calendar is available under Fall 2020 > Market settlement timeline transformation heading at:
<http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx>
- Please submit any questions or comments as an “Inquiry Ticket” through CIDI.

PRR and BPM Updates

PRR	Title	BPM	Status for all
1275	Updated BPM for PC RUC No Pay Quantity and PC Spin Non-Spin No Pay Quantity to accommodate incorporating proxy demand resource – load-shifting resource (PDR-LSR) Curtailment resources into Residual Unit Commitment (RUC) and Spin/Non-Spin processes.	CG PC RUC No Pay Quantity CG PC Spin Non-Spin No Pay Quantity	 Initial comments expired on 8/18/20,  Market notice was sent 8/4/20, <input type="checkbox"/> Expect a market notice on 9/1/20
1276	To support the FERC 841 Requested Adjustments, configuration changes to exempt negative energy for storage resources settlement in cases where the associated UDC or retail utility is unable/ unwilling to separate wholesale and retail charges.	21 CGs are listed for this project	<input type="checkbox"/> Recommendation comments due 9/16/20
1277	Updated BPM Configuration guide for PC RA Availability Incentive Mechanism to accommodate Commitment Cost Enhancement Tariff Clarifications	CG PC RA Availability Incentive Mechanism	

Next BPM PRR review monthly web conference meeting is on Tuesday, August 25 at 11 AM

Fall 2020 - Settlement Release Milestones

Initial Release Milestones as follows:

- 1st draft technical documentation posted = **5/29**
- 1st draft configuration output file + initial release component summary posted = **6/15**
 - All fall projects except FERC 841
- 2nd draft technical documentation updates posted = **6/26**
 - To include FERC 841 + MSTT
- **Scope change:** IDS project moving to Q4 release with 1/1/2021 effective date
 - IDS Tech Docs have been removed from posted Fall Tech Docs
 - Revised posting will follow Q4 release milestones
- 2nd draft config output file + updated release component summary posted = **7/24**
- **Fall release market sim:** please stay informed by participating in both:
 - [Market Simulation web conferences](#) each Monday & Thursday 2-3pm
 - [Release User Group](#) (RUG) web conference, every other Tuesday 10-11am
- Pre-production draft configuration output file + release artifacts planned = **9/22**
- Production deployment planned = **9/29**

Fall Release Market Simulation Settlements Updates

- Connectivity is scheduled to run from week of 7/27 to 8/7
- Phase 1 Structured scenarios will run week of 8/10 – 8/21; Unstructured from week of 8/24 to 9/4
- Phase 2 Structured scenarios will run week of 8/24 – 9/4; Unstructured from week of 9/7 to 9/18
- [Market Simulation Plan](#)
- [Market Simulation Settlements Calendar](#)



MarketSim@caiso.com

Week of	Market Participants	Settlement	Initial Settlement	Recalc
8/3/2020 Mrkt Sim Readiness Testing	Connectivity	✓	✓	
8/10/2020	Phase 1 Structured Scenarios – On Track	Current Timeline		Current Timeline + New MSTT timeline
8/17/2020	Phase 1 Structured Scenarios – On Track	Current Timeline		
8/24/2020	Phase 1 Unstructured Simulation MSTT cutover TD 8/24/20 (Prod TD 1/1/2021) Phase 2 (MSTT, EBTMP) Structured Scenarios- settling on TD 8/25/20	Current Timeline		
8/31/2020	Unstructured Simulation	Current Timeline		Current Timeline + New MSTT timeline

Upcoming Market Simulation conference call is on Thursday, August 20 at 2PM

Fall Release Market Simulation Settlements Calendar

Market Simulation Calendar - Fall 2020 Release Jul 27, 2020 through Sep 4, 2020

Calendar Day	Day	CMRI T+1B	Submit Meter Data by T+3B 18:00 for T+9B Initial	Publish Initial Statement T+4B T+3B Initial. Estimated by DReAMS. No Meter Data submission	Meter Data Due T+4B Statement Submit Meter Data by T+4B 18:00 for Recalc	Publish Initial statement T+6B T+9B Initial. Includes Estimation	Publish Recalc Statement T+8B	Meter data due for T+70B statement Submit Meter Data by T+6B 18:00 for Recalc	Publish Recalc Statement T+9B T+70B Recalculation	Publish Market Invoice
				INITIAL (Current MSTT)	Current MSTT	INITIAL (New MSTT)	RECALC1 (Current MSTT)	New MSTT	RECALC (New MSTT)	
10-Aug-20	Monday			4-Aug	4-Aug		29-Jul			
11-Aug-20	Tuesday			5-Aug	5-Aug		Monthly Recalc 28-Jul - 29-Jul			
12-Aug-20	Wednesday			Monthly Initial 4-Aug - 5-Aug						Daily Recalc 28-Jul, 29-Jul Monthly Recalc 28-Jul - 29-Jul Daily Initial 4-Aug, 5-Aug Monthly Initial 4-Aug - 5-Aug
			11-Aug							
13-Aug-20	Thursday	12-Aug								
14-Aug-20	Friday						4-Aug			
15-Aug-20	Saturday									
16-Aug-20	Sunday									
17-Aug-20	Monday			11-Aug	11-Aug		5-Aug			
18-Aug-20	Tuesday			12-Aug	12-Aug		Monthly Recalc 4-Aug - 5-Aug			
19-Aug-20	Wednesday			Monthly Initial 11-Aug - 12-Aug						Daily Recalc 4-Aug, 5-Aug Monthly Recalc 4-Aug - 5-Aug Daily Initial 11-Aug, 12-Aug Monthly Initial 11-Aug - 12-Aug
			18-Aug							
20-Aug-20	Thursday	19-Aug								
21-Aug-20	Friday						11-Aug			
22-Aug-20	Saturday									
23-Aug-20	Sunday									
24-Aug-20	Monday			18-Aug	18-Aug		12-Aug			
25-Aug-20	Tuesday			19-Aug	19-Aug		Monthly Recalc 11-Aug - 12-Aug			
26-Aug-20	Wednesday			Monthly Initial 18-Aug - 19-Aug						Daily Recalc 11-Aug, 12-Aug Monthly Recalc 11-Aug - 12-Aug Daily Initial 18-Aug, 19-Aug Monthly Initial 18-Aug - 19-Aug
			25-Aug							
27-Aug-20	Thursday	26-Aug								
28-Aug-20	Friday		25-Aug				18-Aug			
29-Aug-20	Saturday									
30-Aug-20	Sunday									
31-Aug-20	Monday		26-Aug				19-Aug			
01-Sep-20	Tuesday						Monthly Recalc 18-Aug - 19-Aug			
02-Sep-20	Wednesday	1-Sep				25-Aug		25-Aug		
03-Sep-20	Thursday	2-Sep				26-Aug		26-Aug		
04-Sep-20	Friday		1-Sep			Monthly Initial 25-Aug - 26-Aug				
05-Sep-20	Saturday									
06-Sep-20	Sunday									
07-Sep-20	Monday									ISO Holiday

Fall Release Market Simulation Settlements Calendar (cont.)

Market Simulation Calendar - Fall 2020 Release Jul 27, 2020 through Sep 4, 2020

Calendar Day	Day	CMRI T+1B		Publish Initial Statement T+4B	Meter Data Due T+4B Statement	Publish Initial statement T+6B	Publish Recalc Statement T+8B	Meter data due for T+70B statement	Publish Recalc Statement T+9B	Publish Market Invoice
			Submit Meter Data by T+3B 18:00 for T+9B Initial	T+3B Initial. Estimated by DReAMS. No Meter Data submission	Submit Meter Data by T+4B 18:00 for Recalc	T+9B Initial. Includes Estimation		Submit Meter Data by T+6B 18:00 for Recalc	T+70B Recalculation	
				INITIAL (Current MSTT)	Current MSTT	INITIAL (New MSTT)	RECALC1 (Current MSTT)	New MSTT	RECALC (New MSTT)	
08-Sep-20	Tuesday		2-Sep						25-Aug	
09-Sep-20	Wednesday									Daily Initial 25-Aug, 26-Aug Monthly Initial 25-Aug - 26-Aug Daily Recalc 18-Aug, 19-Aug Monthly Recalc 18-Aug - 19-Aug
10-Sep-20	Thursday					1-Sep		1-Sep	Monthly Recalc 25-Aug - 26-Aug	
11-Sep-20	Friday					2-Sep		2-Sep		
12-Sep-20	Saturday									
13-Sep-20	Sunday									
14-Sep-20	Monday					Monthly Initial 01-Sep - 02-Sep				
15-Sep-20	Tuesday									
16-Sep-20	Wednesday									Daily Initial 01-Sep, 02-Sep Monthly Initial 01-Sep - 02-Sep Daily Recalc 25-Aug, 26-Aug Monthly Recalc 25-Aug - 26-Aug
17-Sep-20	Thursday								1-Sep 2-Sep	
18-Sep-20	Friday								Monthly Recalc 01-Sep - 02-Sep	Daily Recalc 01-Sep, 02-Sep Monthly Recalc 01-Sep - 02-Sep
19-Sep-20	Saturday									
20-Sep-20	Sunday									

Upcoming Market Simulation conference call is on Thursday, August 20 at 2PM

Winter 2020 – Q4 Settlement Release Milestones

Initial Release Milestones as follows:

- 1st draft technical documentation posted = **8/10**
 - Posted IDS and Day Ahead Nodal (NPM project)
- 1st draft configuration output file + initial release component summary to post = **8/24**
 - Will include current project scope -> IDS, Day Ahead Nodal & Symmetrical Wheeling
 - Also 1st draft tech doc for Symmetrical Wheeling
- 2nd draft configuration output file + 2nd draft tech docs + updated release component summary to post = **9/14**
- 3rd draft configuration output file (pre market sim) to post = **10/2**

Draft settlement technical documents

These are available under the Independent 2020 > Draft settlements technical documents heading at: <http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx>

Intertie Deviation Settlement

CG CC 6455 Intertie Schedules Decline Charges v5.9
CG CC 6456 Intertie Deviation Settlement v5.0
CG CC 6457 Intertie Schedules Decline Charges Allocation v5.1a
CG CC 6458 Intertie Deviation Settlement Allocation v5.0
CG PC System Resource Deemed Delivered Energy Quantity v5.4

Day Ahead Nodal Project

CG CC 6011 Day Ahead Energy, Congestion, Loss Settlement v5.5
CG CC 6790 CRR Balancing Account v5.5
CG CC 6947 IFM Marginal Losses Surplus Credit Allocation v5.2
CG CC 6630 IFM Bid Cost Recovery Settlement v5.2
CG CC 6636 IFM Bid Cost Recovery Tier1 Allocation v5.4a
CG CC 6637 IFM Bid Cost Recovery Tier2 Allocation v5.2
CG CC 4515 GMC Bid Transaction Fee v5.6
CG CC 4560 GMC Market Services Charge v5.5
CG CC 4575 GMC Scheduling Coordinator ID Charge v5.0d
CG PC NPM Precalculation v5.0



Winter 2020 - Q4 Settlement Release Scope

Project	Charge Codes/Impacts
<p>Intertie deviation settlement – implementation (IDS)</p> <p>Effective date: 1/1/2021</p>	<p>6455 (Terminated) 6457 (Terminated) 6456 (New) 6458 (New)</p> <p>System Resource Deemed Delivered Energy Quantity PC</p>
<p>Day Ahead Nodal Pricing Model (NPM) Project</p> <p>Effective Date: 1/1/2021 for listed Charge Codes (PacifiCorp data will start to flow on 1/15/2021)</p>	<p>6011 6790 6947 6630 6636 6637 4515 4560 4575 NPM PC</p>
<p>Asymmetrical Wheeling</p> <p>Effective Date: 12/1/2020</p>	<p>RT Energy Quantity PC Real Time Congestion PC</p>

CRR 1b Post Implementation

Summary of change:

- **Issue:** CRR options are not receiving adequate payment for their CRR. This issues is due to the netting of notional values across time intervals when the option is in the counter flow vs. flow direction. The CRR option should receive a payment in the flow direction and not receive a payment when the sink exceeds the source.
- **Solution:** This enhancement will run prior to the CRR1B calculation process. The source and sink MCCs shall be compared for each option CRR and each hour. If the value of sink MCC -source MCC is positive, then the CRR shall be included in the CRR1B calculations for that hour. If the value is zero or negative, then the CRR shall not be included. This shall be an hour by hour comparison. A possible outcome is that an option CRR is considered in CRR1B for some hours but not all hours.

–This change will be effective **1/1/2019**, **Production deployment 10/1/2020**



California ISO

Settlement corner: EV and micro grids

Peter Klauer

Senior Advisor, Smart Grid Technology

State Level EV Efforts Involving ISO

California Adopted SB350 in 2015: Clean Energy and Pollution Reduction Act ordering the CPUC to direct the IOUs to file applications for programs to accelerate widespread transportation electrification

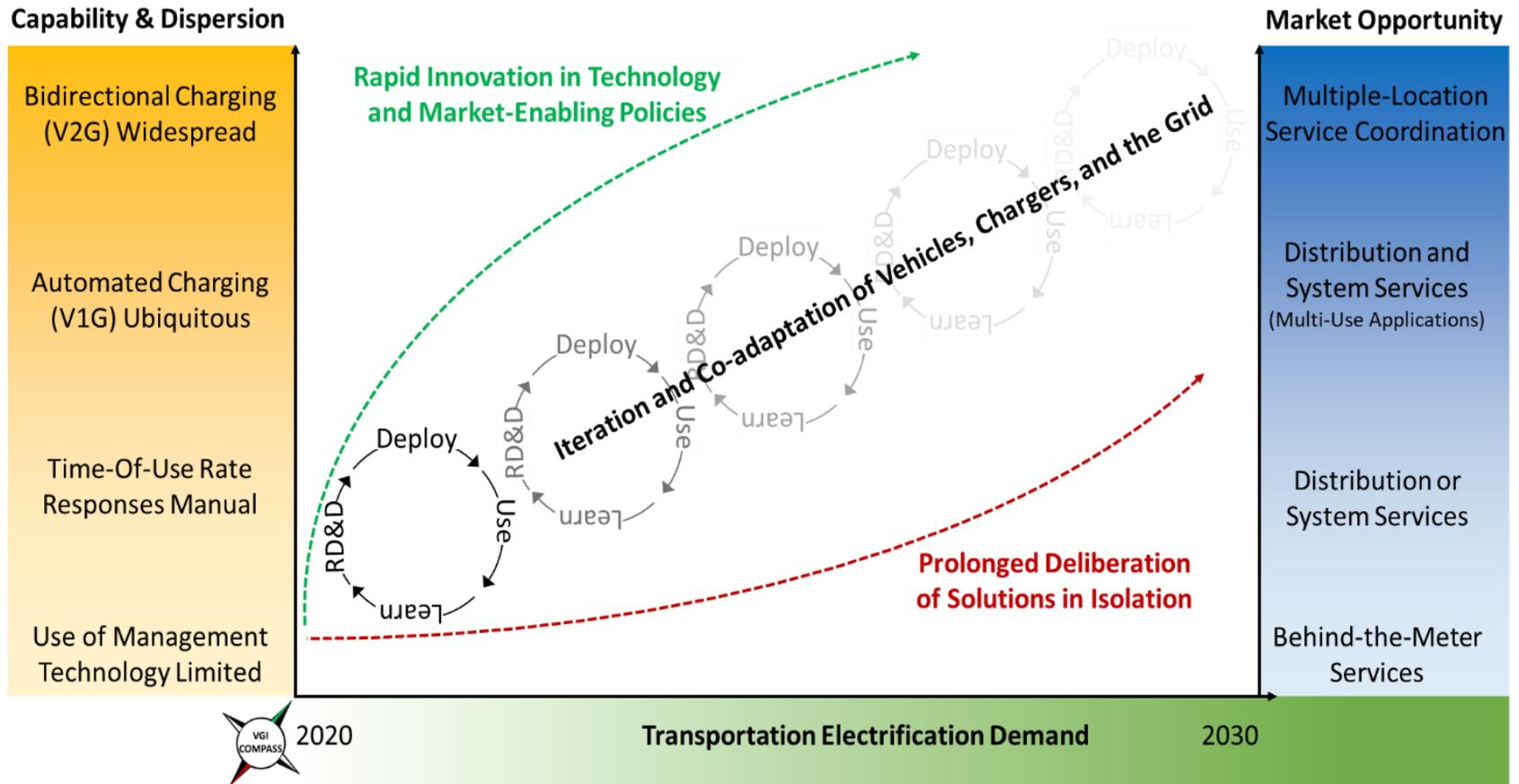
- 5 million ZEV by 2030
- 250,000 EVSE by 2025

CPUC DRIVE OIR R. [18-12-006](#) (2018)

- Transportation Electrification Framework (TEF)
- VGI Roadmap Update
- VGI Working Group Efforts
- Sub-metering and other Pilot Projects

State Level EV Efforts Involving ISO

CEC VGI Roadmap Update



State Level EV Efforts Involving ISO

Go-Biz 2020 ZEV Market Development Framework

- Scaling the EV market to reach climate and air quality goals

	ZEV Action Plan	Market Develop Plan
What?	<ul style="list-style-type: none">• 200+ Actions	<ul style="list-style-type: none">• Smaller #, clear ^{Principles} Objectives
Key Q?	<ul style="list-style-type: none">• Can Mkt. Work?	<ul style="list-style-type: none">• Can Mkt. Scale in time?
Who?	<ul style="list-style-type: none">• Agency Only	<ul style="list-style-type: none">• Multi Stakeholder
State example	<ul style="list-style-type: none">• Lead by Example = LD	<ul style="list-style-type: none">• Lead By Example = LD+MD+HD
Organization	<ul style="list-style-type: none">• Issue area approach	<ul style="list-style-type: none">• Systems Approach
Key additions		<ul style="list-style-type: none">• High level Roles & Responsibilities• Learning Feedback loops• Key document, process identification

Key ISO messaging for VGI

- Importance and value of proper rate design
- Differentiating EV value opportunity and market access opportunities by vehicle type
 - Light Duty vs Medium and Heavy Duty
- Complexities of BTM EV resources
 - Mixing of retail and wholesale activity
 - Forecasting available capacity
 - Capacity differentiation between services (MUA)
- Striking a balance between what can EVs do for the ISO and what ISO can do for EVs

Microgrid Key Characteristics

- An interconnected system of loads and energy resources
- Exists within a clearly defined electrical boundary that can act as a single, controllable entity
- Sized to meet customer need
- Can connect to, disconnect from, or run in parallel with, larger portions of the electrical grid
- Can be managed and isolated to withstand larger disturbances and maintain reliable electrical supply to connected critical infrastructure

Microgrid Policy Development in California

Draft Roadmap for Commercializing Microgrids in California was developed 2016-2017

<https://efiling.energy.ca.gov/GetDocument.aspx?tn=221347&DocumentContentId=24205>

- CEC EPIC R&D funding opportunity for microgrids (2018)

Types:

- Academic
- Healthcare
- Military
- Industrial
- Community level
- Utility

Value Propositions

- Renewable Integration/Carbon reduction
- Resiliency
- Bill Savings/Demand Charge Mitigation
- Reliability
- Provision of Energy and AS

Microgrid Policy Development in California

California enacted SB1339 in late 2018 that added sections to the Public Utilities Code directing the CPUC to act in consultation with ISO and other state agencies to facilitate the development of and removal of barriers to the development and deployment of microgrids

In 2019 the CPUC initiated rulemaking R.19-009-009 (three tracks)

- Track 1 will focus on IOU resiliency planning in areas that are prone to outage events and wildfires
- Track 2 will help accomplish the state's broader policy goals of reducing green house gas emissions, adapting to a changing climate, and protecting health, safety, and lives of residents during catastrophic events
- Track 3 will facilitate the formation of a working group to codify standards and protocols needed to meet California ISO microgrid requirements

Reference Links

- Joint: Draft Roadmap for Commercializing Microgrids in California:
 - <https://efiling.energy.ca.gov/GetDocument.aspx?tn=221347&DocumentContentId=24205>
- SB 1339:
 - https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201720180SB1339
- CPUC Resiliency and Microgrid Events and Materials:
 - <https://www.cpuc.ca.gov/General.aspx?id=6442463482>
- CEC Microgrid Analysis and Case Studies Report:
 - <https://ww2.energy.ca.gov/2018publications/CEC-500-2018-022/CEC-500-2018-022.pdf>
- CPUC Microgrids: A regulatory Perspective (2014):
 - <https://www.cpuc.ca.gov/WorkArea/DownloadAsset.aspx?id=5118>

Here are our upcoming topics

Upcoming Topics	Previous Topics	Published Knowledge Articles
<ul style="list-style-type: none">• Real Time Storage• No Pay• Hybrid Policy• COVID-19 impacts to ISO load forecast	<ul style="list-style-type: none">• Storage- Link• Bid Cost Recovery - Link• FERC 841- requested adjustments – Link• Renewable and energy storage - Link• Fall Release Projects – Link• Transportation electrification and micro grids Link	<ul style="list-style-type: none">• RC Informational Statement• After-the-Fact EIM Manual Dispatches from ISO systems• Validate Mitigated prices in DA, RTPD (FMM) and RTD• Calculation of meter data for TG resources• Energy Transfer System Resource (ETSR)• Pricing node (Pnode) price used for CRR Settlement - <i>New</i>

⌘ Submit topics to us: twitter.com/isosettlements.com



ISO Computer Based Training Programs

Visit [caiso.com](http://www.caiso.com) **Learning Center** web page to access our training calendar, register for courses and find other informational resources: <http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>

Computer Based Training – Settlements	
There are more than 30 computer based training modules on the ISO website covering:	
RC Customer Settlements	http://www.caiso.com/CBT/RC-Settlements/index.html
Energy Settlements Validation Practice	http://www.caiso.com/CBT/EnergySettlementsValidation/story.html
Settlement Validation Practice	http://www.caiso.com/CBT/Settlements%20Validation%20Practice/story_html5.html
Commitment Costs	http://www.caiso.com/CBT/CommitmentCosts-CBT/story.html
Settlements foundational concepts (EIM)	https://www.westerneim.com/CBT/Settlements%20Foundational%20Concepts/Settlements-FoundationalConcepts.html
Metering Overview	http://www.caiso.com/CBT/MeteringOverview/MeteringOverview.html
Settlements Process	http://www.caiso.com/CBT/SettlementsProcess/story_html5.html

Webinars	
ISO Customer Readiness trainers have cancelled in person trainings	
Welcome to the ISO Webinar	October 15, 2020
New initiatives training courses on the learning center web page	



CustomerReadiness@caiso.com

Release Training Information for Settlements

Project	Current Training Dates
Intertie Deviation Settlement	9/29/2020
Hybrid Resources Phase 1	3 rd quarter before Market Sim
Project Presentation Links	Past Training Dates
EIM Enhancements 2020	8/17/2020
Excess Behind the Meter Production	7/21/2020
Market Settlement Timeline Transformation	7/20/2020
FERC 841 – Requested Adjustments	7/15/2020
Energy Storage and Distributed Energy Resources 3B	6/22/2020
Commitment Costs and Default Energy Bid Enhancements <i>Updated</i>	10/8/2019
ADS UI Replacement Training Part 1	6/11/2020

*Access Video to trainings on <http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>

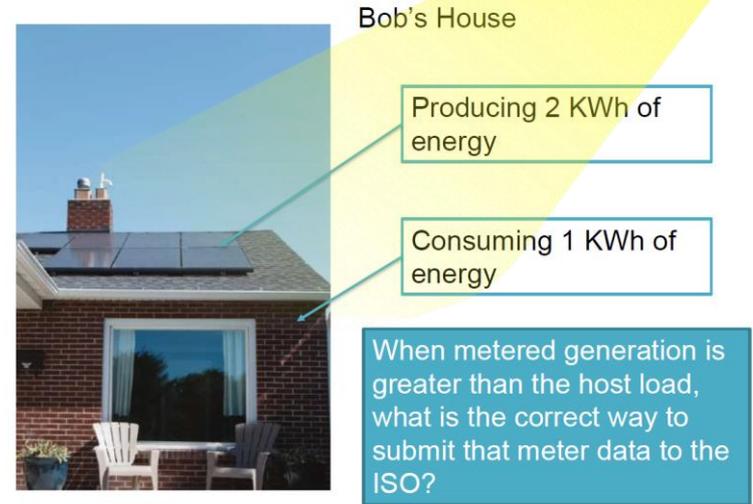
Customer Readiness Spotlight On...

Excess Behind the Meter Production

- Background
- Reporting Oasis
- Settlement Impacts

Settlement charge codes that are using the new "Gross Load" definition

Charge code #	Charge Code Description
372	High Voltage Access Charge Allocation
382	High Voltage Wheeling Allocation
383	Low Voltage Wheeling Allocation
1302	Long Term Voltage Support Allocation
1303	Supplemental Reactive Energy Allocation
6090	Ancillary Service Upward Neutrality Allocation
6194	Spinning Reserve Obligation Settlement
6196	Spinning Reserve Neutrality Allocation
6294	Non-Spinning Reserve Obligation Settlement
6296	Non-Spinning Reserve Neutrality Allocation
6594	Regulation Up Obligation Settlement
6596	Regulation Up Neutrality Allocation
6694	Regulation Down Obligation Settlement
6696	Regulation Down Neutrality Allocation
7256	Regulation Up Mileage Allocation
7266	Regulation Down Mileage Allocation
7896	Monthly CPM Allocation



Gross Load (with Gross Up) calculation for settlements

Hourly Meter Value (KWh)					MRI-S (KWh)	
(1)	(2)	(3)	(4)	(5)	(6)	(7)
Gross Load	EBTMP	DLF	Losses from Gross Load (1) * (3)	Avoided losses from EBTMP (2) * (3)	Gross Load (with Gross Up) (1) + (4) - (5)	EBTMP
35	10	.10	3.5	.1	38.4	10

More examples in FAQ

Recent Tweets



The screenshot displays four tweets from the account @ISOSettlements. Each tweet includes a profile picture of a stylized sun over a green field, the account name, a timestamp, the text of the tweet, and icons for replying, retweeting, liking, and sharing. The tweets are as follows:

- Tweet 1:** @ISOSettlements @isosettlements · 17h
Recalc for TD 8/12 includes FERC 841 Requested Adjustment Exceptional Dispatch scenario.
- Tweet 2:** @ISOSettlements @isosettlements · 20h
Peter Klauer, Senior Advisor, Smart Grid Technology will present at upcoming Settlement User Group for Settlement corner on transportation electrification and microgrids. buff.ly/3a0hllu
- Tweet 3:** @ISOSettlements @isosettlements · 20h
Market Simulation Phase 1 structured scenarios is running through 8/21; upcoming Market Simulation web conference call meeting 8/20 at 2p.m. bit.ly/3hXrPVU
- Tweet 4:** @ISOSettlements @isosettlements · Aug 11
In support of the Independent 2020 Settlement Release planning process, 15 draft technical documents have been posted to the ISO website. bit.ly/2XQQkNc

<https://twitter.com/ISOSettlements>

Next SUG: September 2, 2020

Contact for questions & agenda requests: settlementuser@caiso.com

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Settlement References

- Knowledge Articles
- ISO Settlements Twitter Page
- Ways to Participate in Settlements
- SUG meeting calendar for 2020

Knowledge Articles

CAISO has posted **Knowledge Articles** for FAQs in CIDI.

To access the articles in CIDI, you either:

Option 1: Type in the keyword “**Identify**” in the search field to pull up the article, or

Option 2: Click on the **Knowledge Articles** tab, and then click the **Settlements and Metering** category link to pull up a list of the Settlements related articles.

Posted Knowledge Articles to date:

- RC rate location
- RC Informational Statement
- RC services charge
- 2019 prorated RC charge
- Payment calendar
- ED-DPMIN
- After-the-Fact EIM Manual Dispatches from ISO systems
- Validate Mitigated prices in DA, RTPD (FMM) and RTD *-New*
- Calculation of meter data for TG resources *-New*
- Pricing node (Pnode) price used for CRR Settlement *-New*

California ISO Help Center Knowledge articles Cases Submit a

Search

Identifying

Search Results

All Knowledge Cases Collapse List

Knowledge
5+ Results - Sorted by Relevance View More

Identifying after-the-fact EIM manual dispatches from ISO systems
000001275 · Last Modified Oct 14, 2019 4:23 PM
An EIM organization can identify a manual dispatch after the fact using ADS, the ED and CMRI...How can an Energy Imbalance Market (EIM) organization identify, after-the-fact, whether there

ISO Settlements Twitter

- Settlement related updates
- Market sim updates
- Note: Will not replace any existing media communications
- Please take the opportunity to follow [@ISOSettlements on Twitter](https://twitter.com/ISOSettlements) by downloading the Twitter application to **any mobile device**
- Twitter feed can be accessed on **any web browser**
- **No account required** to view the Twitter feed and posts



Ways to participate in settlements

- ISO Settlements Twitter Page
 - <https://twitter.com/isosettlements>
- Visit the Settlements page
 - <http://www.caiso.com/market/Pages/Settlements/Default.aspx>
- Attend web conference meetings
 - Settlement User Group (SUG) bi-weekly meetings
 - Release User Group
 - Market Sim Conference Calls
 - Initiative status with settlement updates
 - <http://www.caiso.com/StakeholderProcesses/>
 - [System change with settlement updates on independent releases](#)
- BPM PRR Change Management monthly web meeting
 - Settlement and Billing BPM status updates
 - <http://bpmcm.caiso.com/Pages/default.aspx>
 - <http://www.caiso.com/rules/Pages/BusinessPracticeManuals/Default.aspx>
 - <http://www.caiso.com/Documents/ISO-AcronymList.pdf>

Settlement User Group Calendar

2020

Market Services

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on www.caiso.com.



California ISO

January						
S	M	T	W	T	F	S
			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	31	

February						
S	M	T	W	T	F	S
						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

March						
S	M	T	W	T	F	S
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	31				

April						
S	M	T	W	T	F	S
			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		

May						
S	M	T	W	T	F	S
					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
31						

June						
S	M	T	W	T	F	S
	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				

July						
S	M	T	W	T	F	S
			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	31	

August						
S	M	T	W	T	F	S
						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	31					

September						
S	M	T	W	T	F	S
		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			

October						
S	M	T	W	T	F	S
				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	31

November						
S	M	T	W	T	F	S
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					

December						
S	M	T	W	T	F	S
		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	31		

Meeting
 Agenda posted
 Holiday

Settlement User Group

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