



California ISO

# Business Practice Manual (BPM) Change Management: Getting Started

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Customer Readiness

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# What is a Business Practice Manual (BPM)?

- **Business Practice Manuals (BPMs)** provide detailed implementation guidance of requirements listed in the CAISO Tariff.
- BPMs describe **how CAISO business processes are carried out**, from market operations to settlements, planning, and stakeholder engagement.
- **A Proposed Revision Request (PRR)** is the formal mechanism used to request a change, clarification, or update to a BPM.
  - PRRs move through a **structured lifecycle** that includes submission, stakeholder review, recommendations, and final decisions before changes are implemented.
  - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

# What is the BPM for BPM Change Management?

- The BPM change management stakeholder process and the Business Practice Manual for BPM Change Management were created through a stakeholder initiative and received ISO Board approval and FERC approval for implementation in 2009.
- The [BPM for BPM Change Management](#) defines the formal process used to propose, review, and approve changes to all CAISO BPMs.
  - It establishes roles, timelines, stakeholder engagement requirements, and decision-making steps to ensure changes are **transparent, consistent, and well-vetted**.
- [Tariff Section 22.11](#) explains the stakeholder process established to ensure that all affected parties have an opportunity to comment on and shape the proposed nature of any proposed changes to any BPM.

# California ISO Business Practice Manual Change Management: ISO Stakeholder Initiative Process



- Reasons for BPM Revisions:
  - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
  - PRRs are submitted to update BPMs that are impacted by updates or changes that are introduced through policy initiatives.
  - Policy changes submitted through the PRR process, that are not the result of a stakeholder initiative, will be referred to the policy initiative road map process.
- Changes that may occur outside of the Stakeholder Initiative Process include: 1) dispute resolutions, 2) settlements corrections, 3) operations issues, and 4) the need for language clarification.
- Emergency BPM Revisions:
  - When a BPM change effective date occurs retroactively or prior to the completion of the PRR process, the PRR is submitted as an Emergency PRR.

# ISO Business Practice Manual Web Page

Found on

[www.caiso.com](http://www.caiso.com)

Menu navigation:  
Legal and regulatory  
> Business practice  
manuals

Direct Link:

[BPM Change  
Management](#)

## Business Practice Manuals

Business Practice Manuals (BPMs) provide detailed rules, procedures and examples for the administration, operation, planning and accounting requirements of the California ISO and the market that are consistent with the ISO tariff.

Adherence to the manuals is important for orderly operation of the ISO market. And our systematic and publicly transparent change management process ensures the consideration of all relevant information when modifying these manuals.



### BPM document library

View all Business Practice Manuals.



### BPM change management application

Access the ISO's change management application. The application contains a built-in user guide, for help, click the question mark icon on any page.

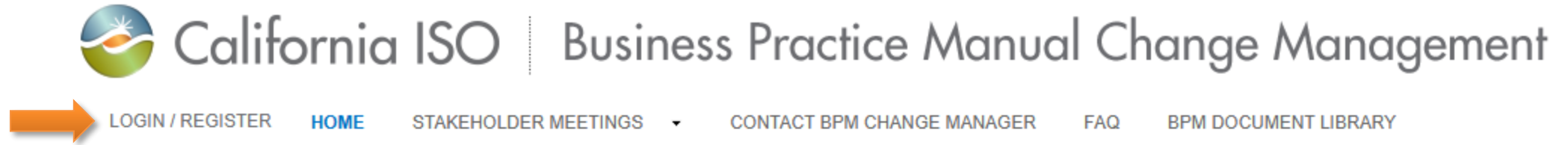
#### On this page

[References](#)

[BPM change management process](#)

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# BPM Change Management Application: Stakeholder Registration



Link: [BPM Change Management Application](#)

- **First-time registration:** Click **Login/Register** to view the registration page.
  - Click on the link titled **New User? Please register** and complete the form.
- **Returning users:** Enter your email address and password to access the tool.

**New User? Please Register** ←

Existing User Login

Email

Password

Sign me in automatically

Login

[Forgot Password?](#)

# Registration Form

Registering gives stakeholders the ability to submit comments or create a new PRR.

California ISO BPM - Registration Form

\* - Indicates Mandatory Field [? User guide](#)

Display Name \*

Email \*

Password \*   
(Password must have at least 1 upper case letter, 1 lower case letter and 1 non-alpha character. Password should contain minimum of 8 characters and a maximum of 16 characters.)

Confirm Password\*

Phone\*   
(Valid Format - XXX-XXX-XXXX)

Employer\*

Organization Representing\*

29030

Click the question mark to view helpful tips.

# BPM Change Management Application

Click the PRR number to open the PRR Form



PRR	PRR Title	BPM	Status	Category	Submitted By	Priority	Last Action	Comments
<a href="#">1096</a>	Capacity test enhancement for energy imbalance market 2018	Energy Imbalance Market	Initial Comment	B	Batakji, Jamal (CAISO)	Emergency	10/24/2018	IC: 0 RC: 0
<a href="#">1095</a>	Pay for performance regulation recertification process change	Market Operations	Pending Recommendation	C	Batakji, Jamal (CAISO)	Normal	10/23/2018	IC: 1 RC: 0
<a href="#">1094</a>	Update the pre-calculation metered sub-system deviation penalty quantity configuration to properly account for metered sub-system Load following instructed imbalance energy for an metered sub-system load following resource	Settlements and Billing	Pending Recommendation	B	Peacock, Bonnie (CAISO)	Emergency	10/23/2018	IC: 0 RC: 0
<a href="#">1093</a>	Enhancement for calculating fifteen-minute schedules from hourly resource	Energy Imbalance Market	Pending Recommendation	C	Batakji, Jamal (CAISO)	Emergency	10/24/2018	IC: 0 RC: 0

## Proposed Revision Request Detail



PRR Life Cycle \* \* \* Pending Recommendation \* \* \* \* \* \*

### PRR Details

<b>PRR #</b>	1095
<b>Title</b>	Pay for performance regulation recertification process change
<b>Date Submitted</b>	10/3/2018 3:30 PM
<b>PRR Category</b>	C
<b>Priority</b>	Normal
<b>Owner</b>	Batakji, Jamal (CAISO)
<b>Status</b>	Pending Recommendation
<b>Status End Date</b>	10/23/2018 11:55 PM
<b>Related BPM</b>	Market Operations
<b>BPM Section</b>	4.6.1
<a href="#">Subscribe</a>	

### Existing Language

See attached

### Announcements

No Announcements has been posted for this PRR.

### Impact Analysis

Impact Analysis not available.

### Initial Comments


<a href="#">SCE Initial Comments PRR 1095.pdf</a>	10/19/2018 7:35 AM Logged By - aditya.chauhan@sce.com (CAISO)
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# Second half of the PRR Form

Registered users will have access to the green plus sign to submit a comment during an open comment period.

<b>Existing Language</b> See attached
<b>Proposed Language</b> See attached
<b>Reason For Revision</b> This is to clarify the changes in the methodology for resource re-certification. Effective date: January 1, 2019

**Attachments**  
[Regulation Certification and Testing Requirements.docx](#)

<b>Initial Comments</b> 	
<a href="#">SCE Initial Comments PRR 1095.pdf</a>	10/19/2018 7:35 AM Logged By - aditya.chauhan@sce.com (CAISO)
<b>Recommendation Comments</b>	
No Recommendation Comments available for this PRR.	



# BPM Change Management Process: Proposed Revision Request (PRR) Timeline

## BPM change management process

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The ISO systematic and publicly transparent BPM Change Management process ensures the consideration of all relevant information when modifying BPMs. The change management process uses a system available through the ISO public website that provides a way to propose BPM changes, comment on open change requests, and track proposed change requests. The change management process begins when the ISO or a stakeholder submits a web-based Proposed Revision Request (PRR). After an ISO review for completeness, PRRs are posted to the website, triggering a stakeholder review and comment period.

**1. Submit Proposed Revision Request (PRR)**

**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

**7. Final decision\***

BPM updated or not updated

\*Stakeholders have the right to appeal the final decision of a proposed revision request (PRR)

# Questions?



For clarification on anything presented in these slides, send an email to: [BPM\\_CM@caiso.com](mailto:BPM_CM@caiso.com)

For other questions or stakeholder specific questions or concerns use one of these methods:

- Submit a [CIDI ticket](#)
- Contact your Scheduling Coordinator
- Use the [“Contact us”](#) page on caiso.com to submit questions