



# BPM Change Management Meeting

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February 25, 2025

# Housekeeping reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.
- Meeting is structured to stimulate honest dialogue and engage different perspectives.
- Please keep comments professional and respectful.

# Instructions for raising your hand to ask a question

- If you are connected to audio through your computer or used the “call me” option, please open the Participants panel and use the raised hand icon  located on the lower right corner of that panel to enter the question queue.
- If you are not logged into Webex and just dialed in on the phones - dial \*3 to enter the queue
- Please remember to state your name and affiliation before making your comment.
- If you need technical assistance during the meeting, please send a chat to the event producer.

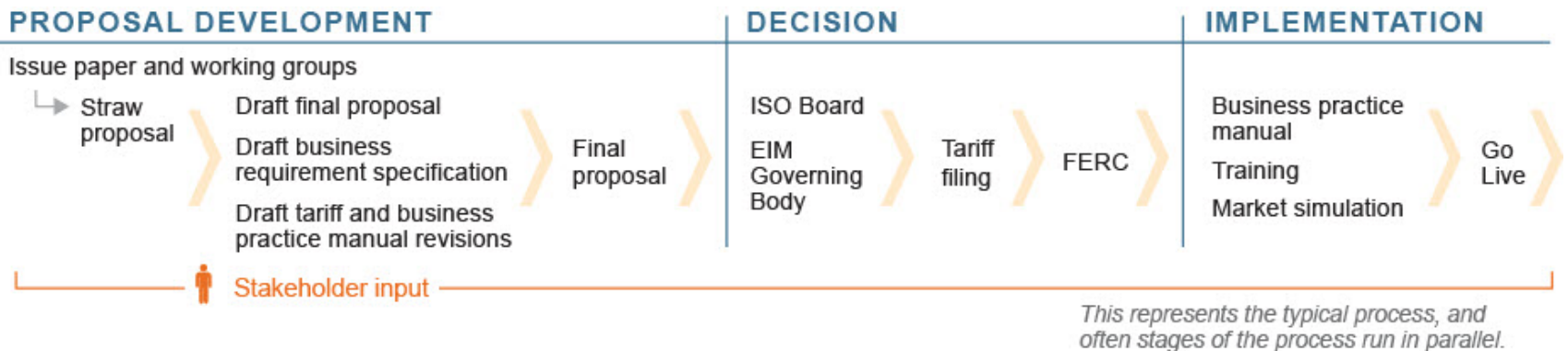
# Agenda – BPM Change Management Meeting

## February 25, 2025

Topic	Presenter
Introduction	Nicole Hines
Meeting Overview and Updates	Nicole Hines
Scheduling Coordinator Certification and Termination	Nicole Hines, Rashele Wiltzius
Reliability Requirements	Melanie Bogen
Candidate CRR Holder Registration	Rashele Wiltzius
Generator Management	Jill Jordan
Settlements and Billing	Massih Ahmadi
Market Instruments	Michael Martin
Market Operations	Michael Martin
Demand Response	Hewayda Ahmed
Wrap-Up and Next Steps	Nicole Hines

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# California ISO Stakeholder Initiative Process



- Business Practice Manuals
  - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
  - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
    - *Policy changes submitted through the PRR process will be referred to the policy initiative road map process.*
  - Each subject area in a BPM is based on enabling language in the ISO tariff.
    - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

# BPM Meeting Changes

- The CAISO is reviewing the date/time intervals for 2025 BPM meetings. At this time, the BPM meetings will continue as they have been previously scheduled and published on the BPM Calendar.
- At a future date, the timing of these meetings will be updated. Please check the BPM webpage for upcoming meetings.
- The CAISO will issue a notice when the BPM calendar is updated for 2025 when this change occurs.

# Demand Response

PRR	PRR Title	Stage
1614	Demand response related changes due to the penalty enhancements: demand response, investigation, tolling	Initial

# PRR 1614 – Demand response related changes due to the penalty enhancements: demand response, investigation, tolling

- Reason for revision
  - Adding the Monitoring Data due data and sanctions related to late or missing data as introduced in the Penalty Enhancements: Demand Response, Investigation, Tolling (PEDRIT) enhancement.
  - The effective date is 1/6/2025. (Emergency PRR)
- Initial comments: California Efficiency + Demand Management Council
- Initial comment period expired: February 19, 2025
- Next step: Post Recommendation



# Scheduling Coordinator Certification and Termination

PRR	PRR Title	Stage
1603	Updates to training requirements during scheduling coordinator certification process	Recommendation
1615	Updating application to include information for the extended day ahead market	Initial

# PRR 1603 – Updates to training requirements during scheduling coordinator certification process

- Reason for revision
  - This change provides additional clarification and outlines the requirements for who must complete training during the Scheduling Coordinator onboarding process. It also specifies what Scheduling Coordinators are required to submit to the CAISO in order to complete their training and emphasizes that Scheduling Coordinator applicants must verify the completion of all training requirements within their organization before finalizing their certification. Effective March 1, 2025.
- Recommendation comments: None
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision

# PRR 1615 – Updating application to include information for the extended day ahead market

- Reason for revision
  - This revision is to include more information required for the Extended Day Ahead Market (EDAM) entity applications. Attachment B was updated to include the additional information as well as clarify application. This is effective as of 1/31/2025.
- Initial comments: None
- Initial comment period expired: February 19, 2025
- Next step: Post Recommendation

# Reliability Requirements

PRR	PRR Title	Stage
1602	Clarification on outage reporting scenarios for non-resource-specific resource adequacy resources	Recommendation
1616	Capacity procurement mechanism track 1	Initial

# PRR 1602 – Clarification on outage reporting scenarios for non-resource-specific resource adequacy resources

- Reason for revision
  - The new update will require a TIGO submission when there is an open tie to get RAIM exemption under section 9.5. This ensures RA imports do not receive RAIM under open tie conditions, since they are not allowed to bid.
- Recommendation comments: None
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision

# PRR 1616 – Clarification on outage reporting scenarios for non-resource-specific resource adequacy resources

- Reason for revision
  - These changes will allow greater flexibility in how the CAISO administers the CPM and scheduling coordinators accept a CPM designation. These changes include:
    - 1) Adjust the MW volume of a significant event CPM designation based on pre-existing or new capacity obligations that arise during the term of the CPM designation;
    - (2) Permit a resource to elect a significant event CPM designation term of less than 30 days;
    - (3) Extend the existing deadline for the CAISO to publish a market notice when issuing a CPM designation from two business days to five business days; and
    - (4) Streamline the CPM designation report process by posting the report on OASIS and foregoing issuance of a market notice advising of the report's availability.
- Initial comments: None
- Initial comment period expired: February 19, 2025
- Next step: Post Recommendation

# Market Candidate CRR Holder Registration

PRR	PRR Title	Stage
1604	Updates to training requirements during congestion revenue rights holder registration process	Recommendation

# PRR 1604 – Updates to training requirements during congestion revenue rights holder registration process

- Reason for revision
  - This change provides additional clarification and outlines the requirements for who must complete training during Congestion Revenue Rights Holder registration process. It also specifies what Congestion Revenue Rights Holder applicants are required to submit to the CAISO in order to complete their training and emphasizes that Congestion Revenue Rights Holder applicants must verify the completion of all training requirements within their organization before finalizing their certification. Effective March 1, 2025.
- Recommendation comments: None
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision



# Generator Management

PRR	PRR Title	Stage
1605	Interconnection process enhancements 2023 updates and clarifications	Recommendation

# PRR 1605 – Interconnection process enhancements 2023 updates and clarifications

- Reason for revision
  - Interconnection Process Enhancements (IPE) 2023 Track 2 implementation and clarifications that were approved by FERC ER25-131-000.
- Recommendation comments: Phoenix Consulting
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision

# Settlements and Billing

PRR	PRR Title	Stage
1606	Updating start-up costs minimum load costs pre-calc BPM configuration for minimum load costs qualification from advisory shut	Recommendation
1608	Updating resource adequacy availability incentive mechanism pre-calc configuration to fix limited energy storage resources negative generic availability issue	Recommendation

## PRR 1606 – Updating start-up costs minimum load costs pre-calc BPM configuration for minimum load costs qualification from advisory shut

- Reason for revision
  - On 8/1/2024 the CAISO implemented the functionality defined in tariff section 11.17.2.1 whereby resources with deviations outside a tolerance band during the advisory shutdown horizon are disqualified from receiving minimum load costs (MLC). Since implementation, the CAISO received settlement disputes involving resources that were dispatched at Pmin when they had received an advisory shutdown and had their MLC disqualified even without any deviations outside the tolerance band. The CAISO has determined this outcome is inconsistent with the policy underlying tariff section 11.17.2.1 and is not a necessary outcome from that tariff section.
  - The configuration change will be deployed around 1/8/2025 and settle charge codes retroactive to Trade Date 8/1/2024 for the next run cycles. This change should resolve all the valid disputes and prevent similar disputes in the future.
- Recommendation comments: None
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision

## PRR 1608 – Updating resource adequacy availability incentive mechanism pre-calc configuration to fix limited energy storage resources negative generic availability issue

- Reason for revision
  - CAISO received disputes with respect to Limited Energy Storage Resources (LESR) negative valued generic availability in the Resource Adequacy Assessment Incentive (RAAIM) assessments. This is a defect to the recent release put in Fall 2024.
  - This will be a retrospective fix deployed around calendar day 1/8/2025 and settle charge codes for Trade Dates starting 3/1/2023. In accordance with Settlements publishing timeline, various later trade dates can eventually be covered through earlier run cycles (T+24M, T+21M, and so on).
- Recommendation comments: None
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision

# Market Instruments

PRR	PRR Title	Stage
1609	Update to OASIS report on nodal limits regarding Convergence bidding	Recommendation

# PRR 1609 – Update to OASIS report on nodal limits regarding Convergence bidding

- Reason for revision
  - OASIS report on nodal limits for Convergence bidding updated to reflect Convergence Bidding is not permitted on Intertie nodes, as described in the Market Operations BPM.
- Recommendation comments: None
- Recommendation comment period expired: December 12, 2024
- Next step: Post Final Decision

# Market Operations

PRR	PRR Title	Stage
1610	Stage 2 variable energy resource will be set to self-schedule only until the resource is a stage 3 variable energy resource	Initial
1611	Convergence bidding is not permitted on inertie nodes	Recommendation
1612	Stage 2 variable energy resource and aggregate capability constraints limits	Recommendation
1613	Market issue that resources providing regulation were going off automatic generation control early to ramp to new dispatch operating target	Recommendation



## PRR 1610 – Stage 2 variable energy resource will be set to self-schedule only until the resource is a Stage 3 variable energy resource

- Reason for revision
  - Once a VER becomes commercial, the CAISO must collect high quality production and meteorological data for a minimum of 30 consecutive days before the CAISO can produce a forecast. During this time and due to the lack a forecast, the Stage 2 VER must submit self-schedules and cannot economically bid. The CAISO will set a flag in the Master File to ensure the Stage 2 VER can only submit self-schedules during this time. Stage 2 VERs must self-schedule and not submit economic bids to ensure accurate dispatch and avoid unwarranted Bid Cost Recovery payments.
  - The ISO has extended the Initial Commenting Period
- Initial comments: Additional comments from Clearway Energy, Phoenix Consulting
- Initial comment period expired: February 19, 2025
- Next step: Post Recommendation

# PRR 1611 – Convergence bidding is not permitted on intertie nodes

- Reason for revision
  - Remove references that convergence bidding is permitted on intertie nodes. There is a reference in Market Operations BPM Section 2.5.2.5.1 that implies convergence bidding may be allowed on ties but it is not.
- Recommendation comments: None
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision

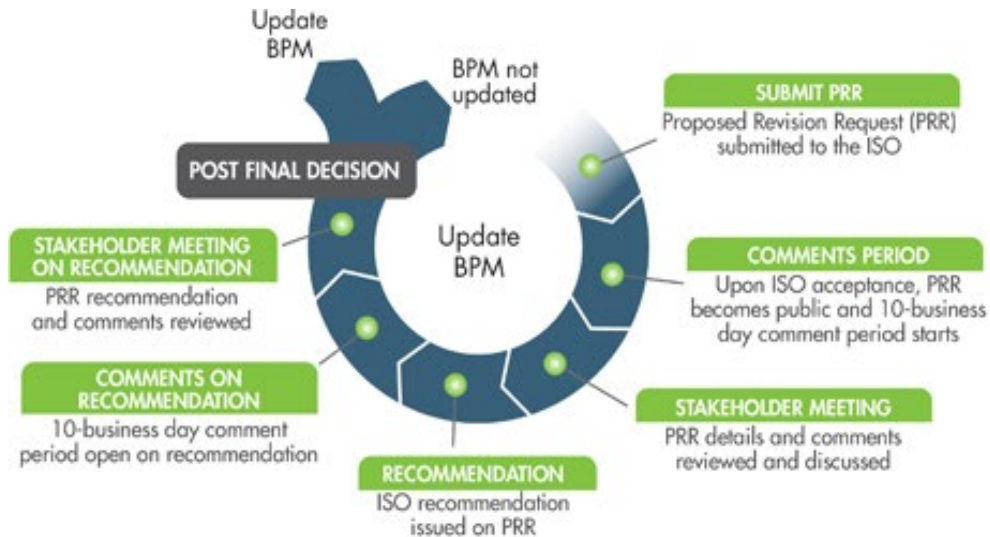
# PRR 1612 – Stage 2 variable energy resource and aggregate capability constraints limits

- Reason for revision
  - If a Stage 2 VER is in an ACC with another unit that schedules Energy and Ancillary Services, there are situations where the RTD dispatch may exceed the Aggregate Capability Constraint limit so the Scheduling Coordinators for these resources must manage the output during this time.
- Recommendation comments: None
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision

# PRR 1613 – Market issue that resources providing regulation were going off automatic generation control early to ramp to new dispatch operating target

- Reason for revision
  - Resources providing Regulation services are needed for reliability to maintain Area Control Error and frequency metrics. Resources providing regulation must stay on Automatic Generation Control through the end of the Fifteen-Minute interval in which there is a schedule or award and then ramp to the next DOT.
- Recommendation comments: None
- Recommendation comment period expired: February 19, 2025
- Next step: Post Final Decision

# Next BPM PRR Review Monthly Meeting: March 25, 2025 @ 11:00 a.m. PT



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process questions:  
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