



California ISO

BPM Change Management Meeting

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October 22, 2024

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Agenda – BPM Change Management Meeting

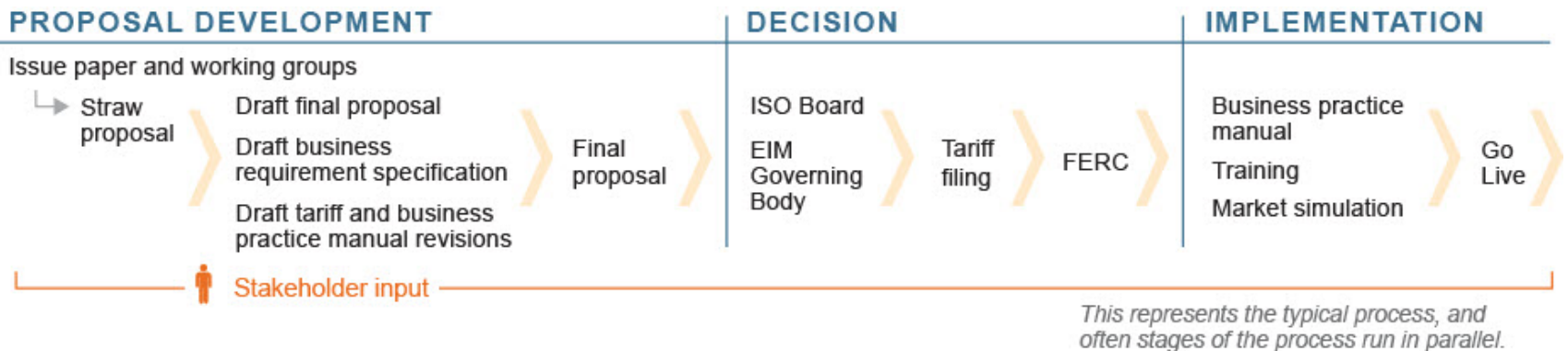
October 22, 2024

Topic	Presenter
Introduction	Nicole Hines
Meeting Overview and Updates	Nicole Hines
Demand Response	Hewayda Ahmed
Reliability Requirements	Melanie Bogen
Market Instruments	Michael Martin
Market Operations	Michael Martin
Energy Imbalance Market	Michael Martin
Settlements and Billing	Massih Ahmadi
Scheduling Coordinator Certification and Termination	Nicole Hines
Wrap-Up and Next Steps	Nicole Hines

BPM Change Management Process

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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.*

Demand Response

PRR	PRR Title	Stage
1588	Updates related to FERC Order 2222	Recommendation

PRR 1588 – Updates related to FERC Order 2222

- Reason for revision
 - Adding language related to the changes found in FERC order 2222 once implemented.
- Recommendation comments: None
- Recommendation comment period expired: October 15, 2024
- Next step: Post Final Decision

Reliability Requirements

PRR	PRR Title	Stage
1582	Clarifications and clean-up for resource adequacy and supply plan uploads	Recommendation

PRR 1582 – Clarifications and clean-up for resource adequacy and supply plan uploads

- Reason for revision
 - To provide clarifications around RA/Supply plan uploads, fix broken links, and to reflect tariff changes that eliminate the \$0/MW RUC availability bid for NGR resources.
- Recommendation comments: None
- Recommendation comment period expired: October 15, 2024
- Next step: Post Final Decision

Energy Imbalance Market

PRR	PRR Title	Stage
1594	Change the load base schedule calculation used in the settlement of WEIM resource sufficiency evaluations	Initial

PRR 1594 – Change the load base schedule calculation used in the settlement of WEIM resource sufficiency evaluations

- Reason for revision
 - The load base schedule calculation is used in the settlement of WEIM non-participating load to compare against the load meter so that load imbalance energy can be determined. Load base schedule is currently calculated considering generator base schedules adjusted for outages and manual dispatches, net scheduled interchange base schedules and losses.
 - The proposed change will calculate the load base schedule using generator base schedules as submitted without any adjustments for outages or manual dispatches and interchange base schedules as submitted without any adjustments for e-tagging. This change to the load base schedule calculation does not change how outages, manual dispatches and e-tagging impacts the Resource Sufficiency Test including the Balancing Test, Bid Range Capacity Test and Flex Ramp Sufficiency Test.
- Initial comments: None
- Initial comment period expired: October 15, 2024
- Next step: Post Recommendation

Market Instruments

PRR	PRR Title	Stage
1586	Addition of two new fields to GRDT to support FERC Order 2222	Recommendation
1591	Updates to the hourly energy shaping factor from the price formation enhancements phase 2 initiative	Initial
1592	Addition of new price correction summary report on OASIS	Initial

PRR 1586 – Addition of two new fields to GRDT to support FERC Order 2222

- Reason for revision
 - Details two new fields on the GRDT that specify if the resource is a Distributed Energy Resource Aggregate (DERA) and the numerous valid baseline methods
- Recommendation comments: None
- Recommendation comment period expired: October 15, 2024
- Next step: Post Final Decision

PRR 1591 – Emergency PRR, Updates to the hourly energy shaping factor from the price formation enhancements phase 2 initiative

- Reason for revision
 - Updates to Attachment P.2 Maximum Import Bid Price Calculation and specifically how the Hourly Energy Price Shaping Factor is calculated.
 - These changes are anticipated to be implemented 11/14/2024.
- Initial comments: None
- Initial comment period expired: October 15, 2024
- Next step: Post Recommendation

PRR 1592 – Addition of new price correction summary report on OASIS

- Reason for revision
 - In support of the Price Corrections Process Enhancements (PCPE) Phase 2 effort, a new Price Correction Summary report will be added to OASIS. This report contains brief descriptions, root cause, intervals affected, price locations and method of price corrective actions taken.
- Initial comments: None
- Initial comment period expired: October 15, 2024
- Next step: Post Recommendation

Market Operations

PRR	PRR Title	Stage
1587	Process for off grid charging indicator election	Recommendation
1590	Scheduling coordinator responsibilities for FERC 2222 distributed curtailed resources and distributed energy resource aggregation resources	Initial
1593	Change to price correction reporting	Initial

PRR 1587 – Process for off grid charging indicator election

- Reason for revision
 - Details the steps market participants, CAISO Regulatory Contracts and CAISO MasterFile teams execute to implement the Off Grid Charging Indicator constraint on a co-located resource.
- Recommendation comments: None
- Recommendation comment period expired: October 15, 2024
- Next step: Post Final Decision

PRR 1590 – Scheduling coordinator responsibilities for FERC 2222 distributed curtailed resources and distributed energy resource aggregation resources

- Reason for revision
 - Added items SCs must perform for Distributed Curtailed Resources (DCR) including SCs must obtain approval to use any Performance Evaluation Methodology (PEM) and, to calculate the Demand curtailment provided by the DCR within a Distributed Energy Resource Aggregation (DERA), the SC must calculate its Demand Response Energy measurement (DREM).
- Initial comments: None
- Initial comment period expired: October 15, 2024
- Next step: Post Recommendation

PRR 1593 – Change to price correction reporting

- Reason for revision
 - As part of the Price Correction Prive Enhancement Phase 2 effort, this PRR reflects changes to the Price Correction Reporting including an OASIS Price Correction Report.
- Initial comments: None
- Initial comment period expired: October 15, 2024
- Next step: Post Recommendation

Settlements and Billing

PRR	PRR Title	Stage
1583	Update configuration guide for CC 6976 to implement amended LOA for COTP losses pricing for WAPA and parties	Recommendation
1584	Update configuration guide for resource adequacy availability incentive mechanism pre-calc to fix limited energy storage resource adequacy generic availability and flexible obligation calculations issue	Recommendation
1585	Updated BPM configuration guide for pre-calc wheel export quantity to accommodate summing over attribute which is conflicting with existing business drivers	Recommendation

PRR 1583 – Update configuration guide for CC 6976 to implement amended LOA for COTP losses pricing for WAPA and parties

- Reason for revision
 - An Amendment to Letter of Agreement on California Oregon Transmission Project (COTP) Losses scheduled at TRCYCOTPIISO scheduling point requires an update to CC 6976.
 - The configuration changes will be deployed with Fall 2024 release with effective Trade Date 11/1/2024.
- Recommendation comments: None
- Recommendation comment period expired: October 15, 2024
- Next step: Post Final Decision

PRR 1584 – Update configuration guide for resource adequacy availability incentive mechanism pre-calc to fix limited energy storage resource adequacy generic availability and flexible obligation calculations issue

- Reason for revision
 - CAISO received disputes with respect to Limited Energy Storage Resources (LESR) generic and flexible Resource Adequacy Assessment Incentive (RAAIM) assessments on two separate occasions and as separate issues.
 - The successor charge codes CC 8830 (Monthly RAAIM Settlement) and CC 8831 (Monthly RAAIM Allocation) will be impacted.
 - To correct this Settlements configuration issue, a retrospective fix is to be deployed around calendar day 10/30/2024 and settle charge codes for Trade Dates starting 3/1/2023 for T+21M. In accordance with Settlements publishing timeline, various later trade dates can eventually be covered through earlier run cycles (T+11M, T+70B, and so on).
- Recommendation comments: None
- Recommendation comment period expired: October 15, 2024
- Next step: Post Final Decision

PRR 1585 – Updated BPM configuration guide for pre-calc wheel export quantity to accommodate summing over attribute which is conflicting with existing business drivers

- Reason for revision
 - When updates (with a 6/1/2024 Effective Date) associated with the TSMSP2 project were released to Production with the Summer 2024 Release a defect discovered that entities with ATC Reservations are seeing a doubling of the export quantities associated with that intertie. This occurred because the PriorityWheelThruPosition payload (which provides the ATC PWT Reservation Quantity derived in WebWheel) provides the CONTRACTRIGHT_MRID attribute and the DReAMS and MSDC team had believed this to be a renaming of the CONTRACT_REF_ID which we were expecting in existing configurations. In testing, the payload only presented future dated transactions so MSDC could not perform Settlement runs which would have discovered the issue proactively. This is causing conflicts with existing business drivers and leads to inaccurate calculations.
- Recommendation comments: None
- Recommendation comment period expired: October 15, 2024
- Next step: Post Final Decision

Scheduling Coordinator Certification and Termination

PRR	PRR Title	Stage
1589	Updating information to add the extended day ahead market to the application	Recommendation

PRR 1589 – Updating information to add the extended day ahead market to the application

- Reason for revision
 - This revision is to include application check box and information for the Extended Day Ahead Market (EDAM) for third party scheduling coordinator process that will be participating in the EDAM.
 - Effective date for this change was 8/27/2024.
- Recommendation comments: None
- Recommendation comment period expired: October 15, 2024
- Next step: Post Final Decision

Next BPM PRR Review Monthly Meeting: November 19, 2024 @ 11:00 a.m. PT



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process questions:
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