



BPM Change Management Meeting

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December 18, 2018

Agenda – BPM Change Management Meeting

December 18, 2018

Topic	Presenter
Introduction / Meeting Overview	Julia Payton
Discussion of active BPM proposed changes: Managing Full Network Model Outage Management Settlements and Billing Generator Interconnection and Deliverability Allocation Procedures Definitions and Acronyms Market Operations Market Instruments Congestion Revenue Rights	Vivian Liang Gautham Katta Bonnie Peacock Linda Wright Grace Clark Jamal Batakji Jamal Batakji Jim McClain
Wrap-Up and Next Steps	Julia Payton

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.*

Managing Full Network Model BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1097	Reliability coordinator services updates

PRR 1097 – Reliability coordinator services updates

- **Reason for revision**
 - This revision includes the following changes.
 - Update language to support Reliability Coordinator Services;
 - Introduce the monthly model update cycle;
 - Add the requirement for notification to CAISO of new and updated impedances for new or existing transmission asset.
 - The effective date of the change will be February 1, 2019.
- **Recommendation comments**
 - No recommendation comments submitted
- **Recommendation comment period expired**
 - December 14, 2018
- **Next step**
 - Post final decision

Settlements and Billing BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1099	Updates to the BPM for Settlements and Billing to support the implementation of reliability coordinator services

PRR 1099 – Updates to the BPM for Settlements and Billing to support the implementation of reliability coordinator services

- **Reason for revision**

- The attached BPM for Settlements and Billing contains updates for billing and settlements specific to RC Services and HANA charges. Additional BPMs for RC Charges and HANA charge codes will be published in future PRRs.
- These changes are effective July 1, 2019 to coincide with the CAISO Tariff amendment filed August 31, 2018.

- **Recommendation comments**

- No recommendation comments submitted

- **Recommendation comment period expired**

- December 14, 2018

- **Next step**

- Post final decision

Reliability Coordinator Services BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1104	Reliability Coordinator Services BPM

PRR 1104 – Reliability Coordinator Services BPM

- **Reason for revision**
 - This is a new BPM as CAISO will take on reliability coordinator services.
- **Recommendation comments**
 - PacifiCorp 12/10 and 12/14
- **Initial comment period expired**
 - December 14, 2018
- **Next step**
 - Post final decision

Outage Management BPM

Initial Phase PRRs for Discussion

PRR	PRR Title
1114	Outage coordination changes due to reliability coordinator service

PRR 1114 – Outage coordination changes due to reliability coordinator service

- **Reason for revision**

- The current outage coordination bpm points to peak RC outage coordination process. Since, CAISO will be the Reliability Coordinator starting next year and CAISO has developed a new RC outage coordination plan, it is necessary to update the outage management bpm in order to be consistent with the new RC outage coordination plan.

- **Initial comments**

- No initial comments submitted

- **Initial comment period expired**

- December 20, 2018

- **Next step**

- Post recommendation

Reliability Requirements BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1103	Reliability requirement update for consistency and cleanup

PRR 1103 – Reliability requirement update for consistency and cleanup

- **Reason for revision**
 - Removes footnote 8 consistent with the appeal of PRR 854 and updates the revisions to indicate 39 throughout the BPM.
- **Recommendation comments**
 - The ISO has accepted the edits and reposted the BPM to the library to include the edits.
- **Recommendation comment period expired**
 - December 20, 2018
- **Next step**
 - Post final decision. All edits are accepted.

Managing Full Network Model BPM

Initial Phase PRRs for Discussion

PRR	PRR Title
1112	Generator contingency and remedial action scheme modeling

PRR 1112 – Generator contingency and remedial action scheme modeling

- **Reason for revision**

- This revision includes the following changes:
 - update Sections 3.3.1.2 and 4.2.4.5 for Generator Contingency and RAS Modeling (GCARM) initiative, http://www.caiso.com/informed/Pages/StakeholderProcesses/GeneratorContingency_RemedialActionSchemeModeling.aspx;
 - remove voltage reference in Section 3.1.
- The effective date of the change will be February 1, 2019.

- **Initial comments**

- No initial comments submitted

- **Initial comment period expired**

- December 17, 2018

- **Next step**

- Post recommendation

Generator Interconnection and Deliverability Allocation Procedures BPM Initial Phase PRRs for Discussion

PRR	PRR Title
1113	2018 interconnection process enhancements deliverability changes

PRR 1113 – 2018 interconnection process enhancements deliverability changes

- **Reason for revision**
 - Reflects changes filed at FERC based on the 2018 Interconnection Process Enhancement (IPE) stakeholder process items 4.1, 4.2, 4.3, and 9.2 relative to deliverability and commercial viability. Effective date of November 27, 2018 is requested to reflect the requested effective date in the FERC filing.
- **Initial comments**
 - No initial comments submitted
- **Initial comment period expired**
 - December 14, 2018
- **Next step**
 - Post recommendation

Definitions and Acronyms BPM

Initial Phase PRRs for Discussion

PRR	PRR Title
1107	Fall 2018 definitions and acronyms update

PRR 1107 – Fall 2018 definitions and acronyms update

- **Reason for revision**
 - Fall 2018 update to incorporate language in the current BPMs and CAISO Tariff Appendix A.
- **Initial comments**
 - No initial comments submitted
- **Initial comment period expired**
 - December 14, 2018
- **Next step**
 - Post recommendation

Market Operations BPM

Initial Phase PRRs for Discussion

PRR	PRR Title
1108	Load forecasting improvements- phase 1
1109	Transferring Attachment F to Congestion Revenue Rights BPM
1111	Aliso Canyon Tariff provisions

PRR 1108 – Load forecasting improvements- phase 1

- **Reason for revision**
 - To improve the current load zones to better align with local loads with more granularity.
 - Target date: 12/1
- **Initial comments**
 - No initial comments submitted
- **Initial comment period expired**
 - December 14, 2018
- **Next step**
 - Post recommendation

PRR 1109 – Transferring Attachment F to Congestion Revenue Rights BPM

- **Reason for revision**
 - Transferring the content of Attachment F to a new Attachment N Congestion Revenue Rights BPM. PRR changes effective 12/28/2018.
- **Initial comments**
 - Pacific Gas & Electric Company 12/14
- **Initial comment period expired**
 - December 14, 2018
- **Next step**
 - Post recommendation

PRR 1111 – Aliso Canyon Tariff provisions

- **Reason for revision**
 - Due to the extension of Aliso Canyon Tariff provisions. CAISO will extend the temporary measures beyond December 16, 2018.
 - Edits are effective 11/26/2018.
 - Also included miscellaneous correction
- **Initial comments**
 - Pacific Gas & Electric Company
- **Initial comment period expired**
 - December 14, 2018
- **Next step**
 - Post recommendation

Market Instruments BPM

Initial Phase PRRs for Discussion

PRR	PRR Title
1110	Aliso Canyon Tariff provisions plus new report definition

PRR 1110 – Aliso Canyon Tariff provisions plus new report definition

- **Reason for revision**
 - Due to the extension of Aliso Canyon Tariff provisions. CAISO will extend the temporary measures beyond December 16th, 2018.
 - Also included new report definition due to CRR 1B project. (Effective 12/28/2018)
- **Initial comments**
 - Pacific Gas & Electric Company
- **Initial comment period expired**
 - December 14, 2018
- **Next step**
 - Post recommendation

Congestion Revenue Rights BPM Recommendation Phase PRRs for Discussion

PRR	PRR Title
1105	Congestion Revenue Rights 1B changes and settlement rule attachment

PRR 1105 – Congestion Revenue Rights 1B changes and settlement rule attachment

- **Reason for revision**

- To describe changes to CRR settlement process associated with CRR 1B policy changes. In addition the Settlement Rule section from the BPM for Market Operations is being moved to the BPM for Congestion Revenue Rights as Attachment 'I'

- **Recommendation comments**

- No recommendation comments submitted

- **Recommendation comment period expired**

- December 14, 2018

- **Next step**

- Post final decision

Settlements and Billing BPM

Recommendation Phase PRRs for Discussion

PRR	PRR Title
1098	Updated BPM configuration guide for charge code 8835 annual resource adequacy availability incentive mechanism neutrality to accommodate the removal of the pass through bill hierarchy
1100	Settlement charge codes changes for congestion revenue rights auction efficiency phase 1B initiative
1101	Updates to BPM configuration guides for charge codes 8830 and 8831 to implement resource-level resource adequacy availability incentive mechanism exclusion flags
1102	Updated BPM configuration guide for pre-calculation system resource deemed delivered energy quantity to accommodate energy imbalance market BANC-SMUD initiative relocation of logical meter calculation code from an upstream calculation into settlements
1106	Update settlement input description for dynamic ancillary services obligation flag

PRR 1098 – Updated BPM configuration guide for charge code 8835 annual resource adequacy availability incentive mechanism neutrality to accommodate the removal of the pass through bill hierarchy

- **Reason for revision**

- The existing PTB 'PTB_RAAIM_NTRL_ALLOC_ADJ_AMT' which is part of the PTB hierarchy does not have its variable name listed in the BPM under 3.6 Inputs-External Systems. Further analysis of CC 8835 revealed a scenario where the hierarchy PTB and the PTB hierarchy would be required so the PTB hierarchy is being retained, this proposed changes are pertaining to document/language changes only.
- The ISO anticipates implementation on or about 12/19/2018, with an effective date of 11/1/2016.

- **Recommendation comments**

- No recommendation comments submitted

- **Recommendation comment period expired**

- December 14, 2018

- **Next step**

- Post final decision

PRR 1100 – Settlement charge codes changes for congestion revenue rights auction efficiency phase 1B initiative

- **Reason for revision**

- The charge code changes implement CRR Auction Efficiency Phase 1B initiative from Settlements perspective.
- The ISO anticipates implementation of the BPM changes on or about Dec 19, 2018, with effective date 1/1/2019 in time for Year 2019 CRR settlement.

- **Recommendation comments**

- No recommendation comments submitted

- **Recommendation comment period expired**

- December 14, 2018

- **Next step**

- Post final decision

PRR 1101 – Updates to BPM configuration guides for charge codes 8830 and 8831 to implement resource-level resource adequacy availability incentive mechanism exclusion flags

- **Reason for revision**

- To facilitate ad-hoc adjustments to RAIM settlements, we are implementing a flag to allow Settlements Production to manually exempt resources from monthly RAIM calculations without having to estimate the RAIM settlement amounts first. The flags are monthly and at the resource level.
- The planned production deployment date is 12/19/2018 with a 5/1/2018 effective date.

- **Recommendation comments**

- No recommendation comments submitted

- **Recommendation comment period expired**

- December 14, 2018

- **Next step**

- Post final decision

PRR 1102 – Updated BPM configuration guide for pre-calculation system resource deemed delivered energy quantity to accommodate energy imbalance market BANC-SMUD initiative relocation of logical meter calculation code from an upstream calculation into settlements

- **Reason for revision**

- The EIM BANC-SMUD Initiative requires that Logical Meter Calculation code be moved from an upstream calculation into Settlements. Settlements will now map PISOA five minute telemetry data, in order to derive an Allocation factor which will then be multiplied against a CISO dynamic system resources ‘Checkout’ quantity, so to derive the LMC which is itself currently derived by an upstream system. This impacts PC System Resource Deemed Delivered Energy Quantity.
- The effective trade date is 4/1/2019 and the anticipated implementation date is 12/19/2018. (Please note: Effective Date changed from 1/1/2019 to 4/1/2019)

- **Recommendation comments**

- No recommendation comments submitted

- **Recommendation comment period expired**

- December 14, 2018

- **Next step**

- Post final decision

PRR 1106 – Update settlement input description for dynamic ancillary services obligation flag

- **Reason for revision**

- This language only change clarifies the flag input for dynamic AS obligation, BAResourceDynamicASObligationFlag, which is associated with bill determinant name BA_DAY_RSRC_DYN_AS_OBLIG_FLG.
- A data error was found to have caused this factor data to not be properly created, the correction will happen for any trade date being resettled starting from Trade Date 3/1/2016.

- **Recommendation comments**

- No recommendation comments submitted

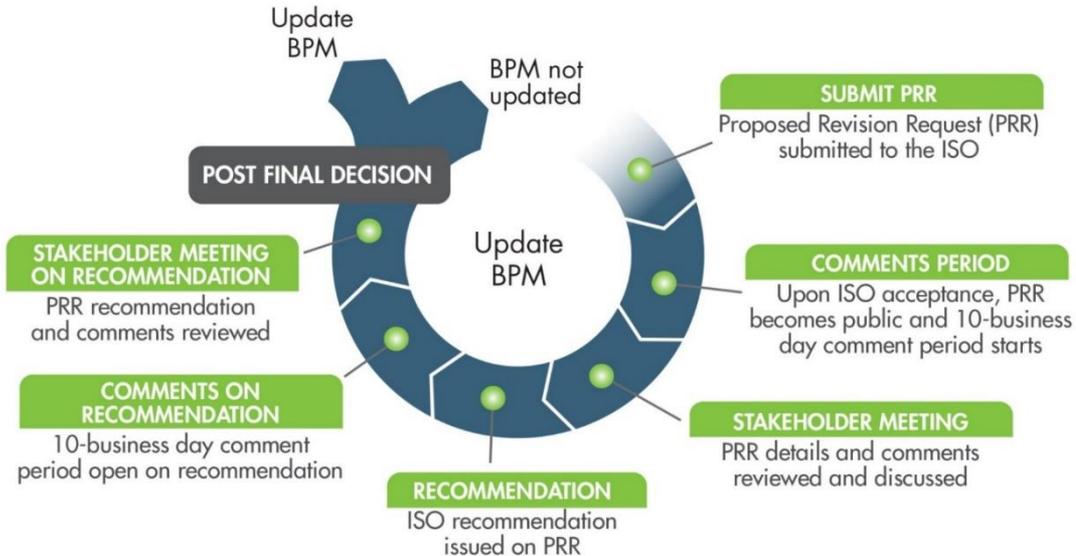
- **Recommendation comment period expired**

- December 14, 2018

- **Next step**

- Post final decision

Next BPM Monthly Meeting: Tues., January 22, 2019 @ 11 a.m.



BPM change management Process Questions:

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