



BPM Change Management Meeting

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December 27, 2022

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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

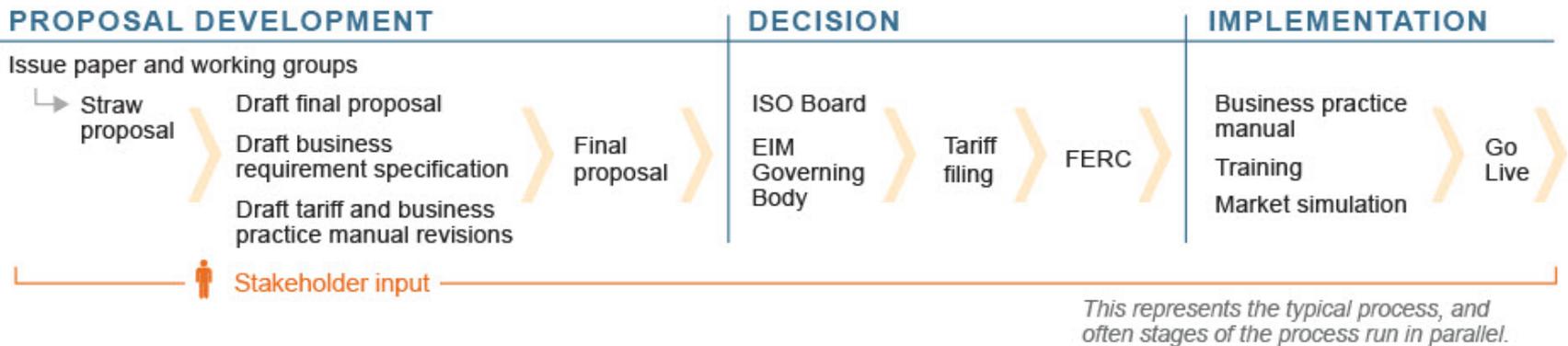
- If you are connected to audio through your computer or used the “call me” option, select the raise hand icon  above the chat window located on bottom right corner of the screen. **Note:** #2 only works if you dialed into the meeting.
- Please remember to state your name and affiliation before making your comment.
- If you need technical assistance during the meeting, please send a chat to the event producer.

Agenda – BPM Change Management Meeting December 27, 2022

Topic	Presenter
Introduction / Meeting Overview	Nicole Hines
Discussion of active proposed changes: Reliability Requirements Market Operations Market Instruments Settlements and Billing Transmission Planning Process	Abdulrahman Mohammed-Ali Michael Martin, Jacob Fox Michael Martin, Jacob Fox Massih Ahmadi Jeff Billinton
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.*

Transmission Planning Process BPM

PRR	PRR Title	Stage
1477	Transmission Planning Process Enhancements	Initial

PRR 1477: Transmission Planning Process Enhancements

- Reason for revision
 - The transmission planning process enhancement initiated identified the following changes:
 - Adjust the timeline for releasing the draft transmission plan each planning cycle from the end of January to the end of March, targeting approval of the final comprehensive annual transmission plan in each year's May Board of Governors meetings.
 - Coordinate with other planning processes and enable the ISO to approve major long lead time transmission projects needed beyond the current 10 year planning horizon.
- Initial Comments: None
- Initial comment period expired: December 20, 2022
- Next step: Post Recommendation

Reliability Requirements BPM

PRR	PRR Title	Stage
1475	Central Procurement Entity Project	Recommendation

PRR 1475: Central Procurement Entity Project

- Reason for revision
 - BPM changes due to the Central Procurement Entity (CPE) initiative changes
- Recommendation Comments: None
- Recommendation comment period expired: December 20, 2022
- Next step: Post Final Decision

Market Instruments BPM

PRR	PRR Title	Stage
1474	Flexible Ramping Product Deliverability	Put back into initial
1479	Added description of the residual unit commitment under supply infeasibility and enforced constraints report	Initial
1480	Updated section on hydro default energy bid submissions to provide more guidance WEIM entities	Initial

PRR 1474: Flexible Ramping Product Deliverability

- This PRR was put back in initial phase for additional time and commenting
- Reason for revision
 - Updating BPM to reflect calculation and report changes due to the Flexible Ramp Product Deliverability Policy Initiative
- Initial Comments: PG&E 11/15
- Initial comment period expired: November 15, 2022
- Second set of initial comments: SRP 12/20
- Second set of initial comments: December 20, 2022
- Next step: Post Recommendation

PRR 1479: Added description of the residual unit commitment under supply infeasibility and enforced constraints report

- Reason for revision
 - Added description of the existing OASIS report RUC Under Supply Infeasibility and Enforced Constraints already described in the Market Operations BPM. The Minimum State of Charge (MSOC) was developed to ensure that in the real-time market storage resources are charged to a level that will allow them to deliver their day-ahead discharge schedules.
- Initial Comments: None
- Initial comment period expired: December 20, 2022
- Next step: Post Recommendation

PRR 1480: Updated section on hydro default energy bid submissions to provide more guidance WEIM entities

- Reason for revision
 - Added to section D.8.1 on how an SC can request a new default electric pricing hub for the Hydro DEB. Also added a new hub to the existing list of hubs in section B.2.2
- Initial Comments: None
- Initial comment period expired: December 20, 2022
- Next step: Post Recommendation

Market Operations BPM

PRR	PRR Title	Stage
1471	Updates for hybrid resources phase 2b policy initiative	Put back into Initial
1473	Flexible Ramping Product Deliverability	Put back into Initial
1478	Removal of 50% spinning ancillary service procurement requirement	Initial

PRR 1471: Updates for hybrid resources phase 2b policy initiative

- This PRR was put back in initial phase for additional time and commenting
- Reason for revision
 - Updates that support the Hybrid Resource Phase 2b project including ACC Constraint structures, market processes, Dynamic limits, examples and diagrams.
- Initial Comments: None
- Initial comment period expired: November 15, 2022
- Second Set of Initial Comments: None
- Second Set of Initial comment period expired: December 20, 2022
- Next step: Post Recommendation

PRR 1473: Flexible Ramping Product Deliverability

- This PRR was put back in initial phase for additional time and commenting
- Reason for revision
 - Updating BPM to reflect calculation and report changes due to the Flexible Ramp Product Deliverability Policy Initiative
- Initial Comments: None
- Initial comment period expired: November 15, 2022
- Second Set of Initial Comments: None
- Second Set of Initial comment period expired: December 20, 2022
- Next step: Post Recommendation

PRR 1478: Removal of 50% spinning ancillary service procurement requirement

- Reason for revision
 - WECC has eliminated the requirement that a Balancing Authority maintain at least 50% of its contingency reserves as Spinning Reserve. The CAISO will continue to procure Spinning Reserve but its target procurement may be less than 50% of its contingency reserve requirement.
- Initial Comments: None
- Initial comment period expired: December 20, 2022
- Next step: Post Recommendation

Settlements and Billing BPM

PRR	PRR Title	Stage
1476	CG PC HVAC Metered Load_5.6, CG CC 374 High Voltage Access Charge Revenue Payment_5.3a, CG CC 372 High Voltage Access Charge Allocation_5.2a	Initial
1481	Settlement configuration changes from market sim review to support hybrid resources phase 2B initiative and ensure non-hybrid resources selecting CAISO forecast receive forecast fee.	Initial

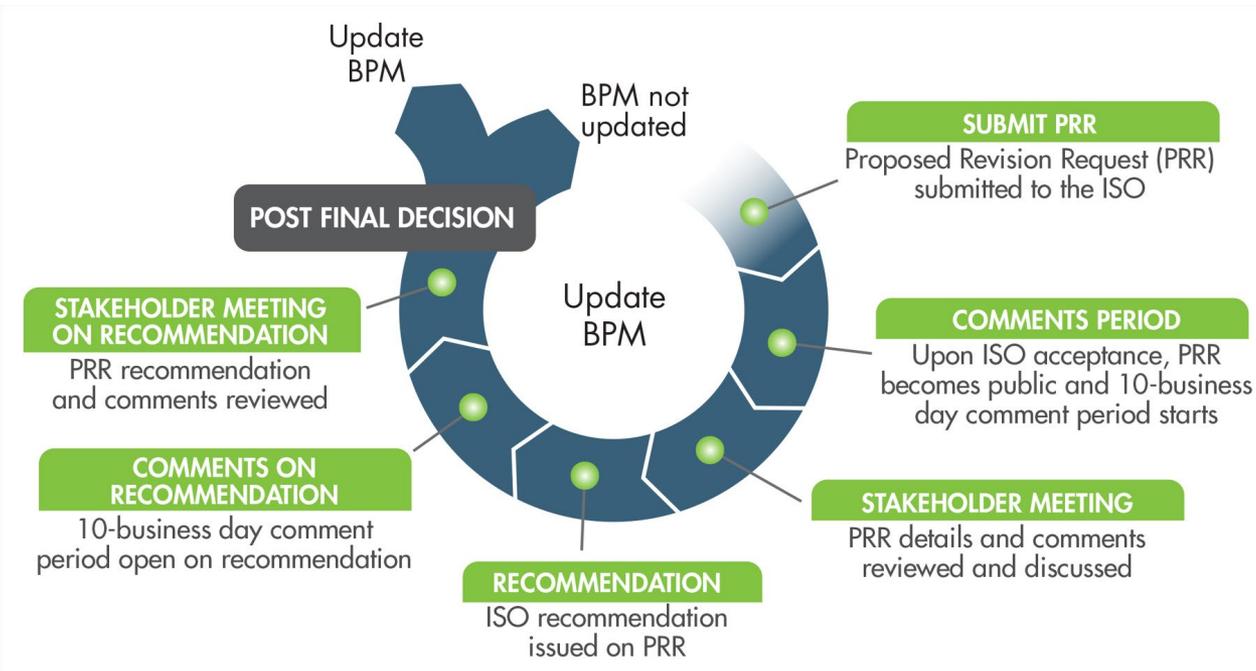
PRR 1476: CG PC HVAC Metered Load_5.6, CG CC 374 High Voltage Access Charge Revenue Payment_5.3a, CG CC 372 High Voltage Access Charge Allocation_5.2a

- Reason for revision
 - By leaving the CAISO Market mid-month, a PTO has exposed a configuration issue associated with Monthly Major Groups associated with daily or monthly charge types where those charge types have factors as input.
 - A configuration change is required so that calculations can accurately account for a PTO which elects to exit the CAISO Market mid-month so as to ensure accurate High Voltage Access Charge allocations.
 - Since the existing methodology in the HVAC Metered Load which allocates monthly PTB load exemptions to days within the month required charge types be associated with monthly major groups the configuration will be modified to allocate that value using a View and change specific daily charge type monthly major group associations to daily major group associations.
 - CC 372, CC 374, and HVAC Metered Load PC are impacted. The effective date of the change is 10/1/2022 and the anticipated implementation date is 12/28/2022. .
- Initial Comments: None
- Initial comment period expires: December 20, 2022
- Next step: Continue Comment Period

PRR 1481: Settlement configuration changes from market sim review to support hybrid resources phase 2B initiative and ensure non-hybrid resources selecting CAISO forecast receive forecast fee.

- Reason for revision
 - The Configuration changes are needed to support the new phase of Hybrid Resources Phase 2B. The change supports non-hybrid resources continuing to receive ISO forecast fee correctly.
 - The effective Trade Date for the change to Forecasting Service Fee charge code is 12/1/2022 and the anticipated implementation date is 11/30/2022.
- Initial Comments: None
- Initial comment period expired: December 20, 2022
- Next step: Post Recommendation

Next BPM PRR Review Monthly Meeting: January 24, 2023 @ 11 a.m.



BPM change management
process questions:

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