



BPM Change Management Meeting

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January 26, 2021

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Reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO permission.
 - Video recording will be posted to the initiative webpage within 3 business days
- To ask a question, press #2 on your telephone keypad.
- Calls are structured to stimulate an honest dialogue and engage different perspectives.
- Please keep comments friendly and respectful.

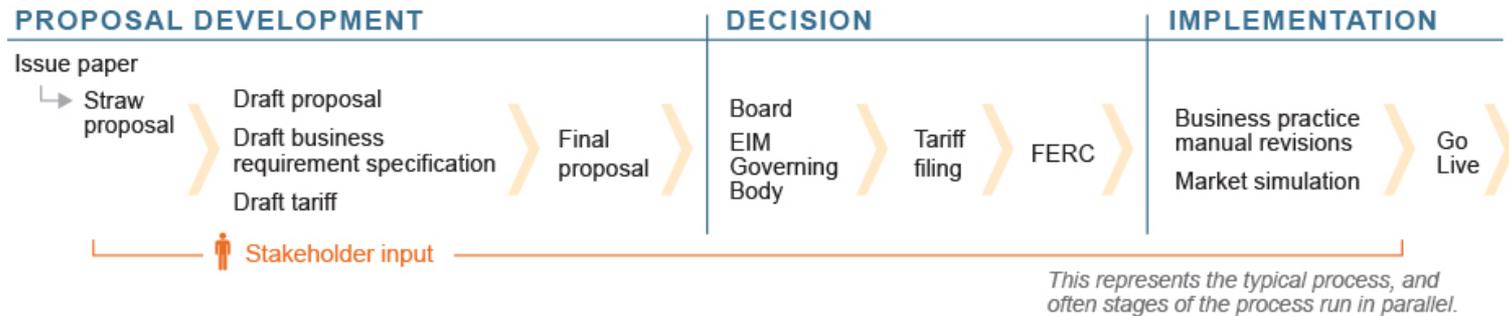
Agenda – BPM Change Management Meeting

January 26, 2021

Topic	Presenter
Introduction / Meeting Overview	Isabella Nicosia
Discussion of active proposed changes: Direct Telemetry BPM Market Operations BPM Energy Imbalance Market BPM Market Instruments BPM Generator Interconnection and Deliverability Allocation Procedures BPM Settlements and Billing BPM	Priyanka Namburi Jamal Batakji Jamal Batakji Jamal Batakji Phelim Tavares Brenda Corona
Wrap-Up and Next Steps	Isabella Nicosia

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.*

Direct Telemetry BPM

PRR	PRR Title	Stage
1310	New requirements for hybrid resources and transport layer security	Initial

PRR 1310 – New requirements for hybrid resources and transport layer security

- Reason for revision
 - New requirements for hybrid resources and transport layer security
 - This revision is effective 12/1/2020
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - January 5, 2021
- Next step:
 - Post recommendation

Market Operations BPM

PRR	PRR Title	Stage
1313	Clean-up language section 2.5.5 for PRR 1136	Initial
1312	Following trajectory between dispatch operating target	Initial
1303	Intertie deviation settlement	Recommendation

PRR 1313 – Clean-up language section 2.5.5 for PRR 1136

- Reason for revision
 - This is a clean up related to the language in section 2.5.5. This was missed being published during the implementation of PRR 1136. No additional changes were made at this time. Effective date 12/22/2020.
- Initial comments:
 - No comments submitted
- Initial comment period expired:
 - January 5, 2021
- Next step:
 - Post recommendation

PRR 1312 – Following trajectory between dispatch operating target

- Reason for revision
 - This Proposed Revision Request clarifies the expectation under existing tariff that all resources follow their Dispatch Operating Point (DOP). Effective Date: Upon completion of the PRR.
- Initial comments:
 - LSA; submitted 1/6/21
- Initial comment period expires:
 - February 16, 2021
- Next step:
 - Post recommendation

PRR 1303 – Intertie deviation settlement

- Reason for revision
 - This change is to incentivize the delivery of awarded energy on interties and to improve operational awareness and grid reliability. It also eliminate the decline charge and replace it with a new settlement mechanism known as the under/over delivery charge. Effective date: 1/1/21
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 5, 2021
- Next step:
 - Post final decision

Energy Imbalance Market BPM

PRR	PRR Title	Stage
1305	Negotiated rates new process changes for energy imbalance market BPM	Recommendation

PRR 1305 – Negotiated rates new process changes for energy imbalance market BPM

- Reason for revision
 - This is a new process related to requests for some negotiated rates (major maintenance adders, negotiated default energy bids, custom variable operations and maintenance adders, etc.) will now be submitted through a Customer Inquiry Dispute and Information (CIDI) ticket application rather than through the current email practice.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 5, 2021
- Next step:
 - Post final decision

Market Instruments BPM

PRR	PRR Title	Stage
1304	Negotiated rates new process changes for market instruments BPM	Recommendation

PRR 1304 – Negotiated rates new process changes for market instruments BPM

- Reason for revision
 - This is a new process related to requests for some negotiated rates (major maintenance adders, negotiated default energy bids, custom variable operations and maintenance adders, etc.) will now be submitted through a Customer Inquiry Dispute and Information (CIDI) ticket application rather than through the current email practice.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 5, 2021
- Next step:
 - Post final decision

Generator Interconnections and Deliverability Allocation Procedures BPM

PRR	PRR Title	Stage
1309	Clarification on point of interconnection changes, independent study process eligibility, interconnection financial security refunds, and allowable actions when projects are parked	Recommendation

PRR 1309 – Clarification on point of interconnection changes, independent study process eligibility, interconnection financial security refunds, and allowable actions when projects are parked

- Reason for revision
 - Clarification on point of interconnection (POI) changes, independent study process eligibility, interconnection financial security (IFS) refunds, and allowable actions when projects are parked.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 5, 2021
- Next step:
 - Post final decision

Settlements and Billing BPM

PRR	PRR Title	Stage
1308	To support energy imbalance market enhancements 2020, specifically symmetrical wheeling. Configuration changes to the energy imbalance market real time marginal losses offset.	Recommendation
1307	Updated multiple BPM configuration guides to accommodate updating the procedure that documents the steps for submitting the transmission revenue requirement detail to the CAISO required for updating transmission access charge rates.	Recommendation
1306	Updated BPM configuration guides for enforcement protocol charge group charge code 1591, 1592, and 1593 to accommodate charge code 1593 associated with daily statements.	Recommendation

PRR 1308 – To support energy imbalance market enhancements 2020, specifically symmetrical wheeling. Configuration changes to the energy imbalance market real time marginal losses offset.

- Reason for revision
 - The proposed enhancement will settle all Base ETSR schedule deviations at an EIM BAA intertie at the same SP-Tie LMP that would have been used to settle TID schedule deviations with that EIM BAA at that intertie if the EIM BAA at the other end were a non-EIM BAA.
 - Updated EIM Real Time Marginal Losses Offset to accommodate settlements changes regarding new pricing locations.
 - The effective date of the changes is 2/1/2021.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 5, 2021
- Next step:
 - Post final decision

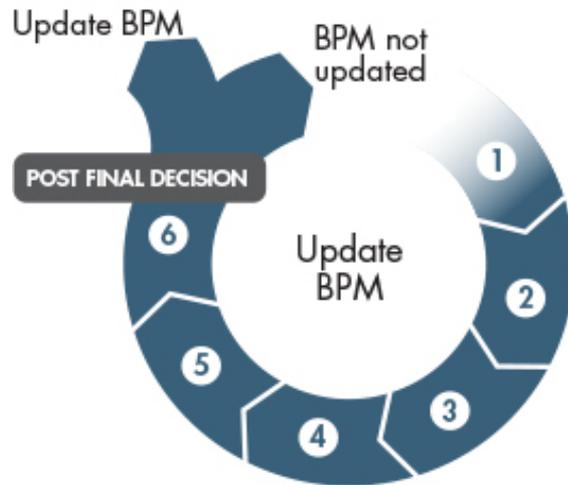
PRR 1307 – Updated multiple BPM configuration guides to accommodate updating the procedure that documents the steps for submitting the transmission revenue requirement detail to the CAISO required for updating transmission access charge rates.

- Reason for revision
 - Updating the procedure that documents the steps for submitting the TRR detail to the ISO required for updating Transmission Access Charge (TAC) rates triggered this change. This will result in a process document that can be posted to the web. The BPM configuration will be updated to reflect the new processing procedures for TAC Submission. CG CC 372 High Voltage Access Charge Allocation, CG CC 374 High Voltage Access Charge Revenue Payment, CG PC High Voltage Access Charge and Transition Charge, and CG PC Percent PTO Allocation are impacted. The effective trade date of the change is 1/1/2021 and the anticipated implementation date is 1/1/2021.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 5, 2021
- Next step:
 - Post final decision

PRR 1306 – Updated BPM configuration guides for enforcement protocol charge group charge code 1591, 1592, and 1593 to accommodate charge code 1593 associated with daily statements.

- Reason for revision
 - While validating the 10/21/2020 Invoice, it was discovered that CC 1593 showed up at the parent charge group total level for the monthly - TD 9/1/2020 T+12 statement.
 - This CC is not settled at the monthly but rather the daily level. Issue was corrected by reconfiguring the EP adjustment Charge Group such that is only associated with a Daily Parent Group. CG CC 1591 EP Penalty Charge, CG CC 1592 EP Penalty Allocation Payment, and CG CC 1593 EP Allocation for Under or Over Reported Load Generation are impacted.
 - The effective trade date of the change is 04/01/2009 and the anticipated implementation date is 11/16/2020.
- Recommendation comments:
 - No comments submitted
- Recommendation comment period expired:
 - January 5, 2021
- Next step:
 - Post final decision

Next BPM PRR Review Monthly Meeting: February 23, 2021 @ 11 a.m.



- 1 SUBMIT PRR**
Proposed Revision Request (PRR) submitted to the ISO
- 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

BPM change management
process questions:
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