



California ISO

Reliability Coordinator West Oversight Committee

Public Session

July 18, 2019

12:30 – 2:30 p.m. PDT

Agenda

Time:	Topic:	Presenter:
12:30 – 12:35	Welcome/agenda	Kristina Osborne – CAISO
12:35 – 12:40	Roll call	Michelle Cathcart - Chair
12:40 – 1:00	Updates: Customer Onboarding & Technology <ul style="list-style-type: none"> • Lessons learned; transition plan • DB 91 model update 	Joanne Alai – CAISO
1:00 – 1:20	Update: RC Operations <ul style="list-style-type: none"> • Transition to RC of record • Procedures update • Certification update • RC Metric Development 	Tim Beach – RC West
1:20 – 1:35	Update: Settlements <ul style="list-style-type: none"> • Access and testing • Billing schedule 	Heather Kelley - CAISO
1:35 – 1:55	Update: Hosted Advanced Network Applications (HANA) <ul style="list-style-type: none"> • August training • September access and billing 	Gina Wansor - CAISO
1:55 – 2:15	Update: Legal <ul style="list-style-type: none"> • Non-conforming RC services agreement for Los Angeles Department of Water and Power (LADWP) 	John Anders - CAISO
2:15 – 2:20	Future agenda items	Michelle Cathcart - Chair
2:20 – 2:30	Public comment	
	Public session adjourns	
	Executive session	

Updates: Customer Onboarding and Technology

Joanne Alai
RC Project Manager

Topics

- **Onboarding Phase 1 - Lesson's Learned**
 - RC West Process and Communication
What can RC West do to improve processes and communications with customers?
 - Customer's Processes and Communication
What can customers do to ensure a successful RC Transition?
- **Onboarding Phase 2 - Major Milestones and Progress**
- **Technology Update**

Lesson's Learned – RC West Processes/Communication

What can RC West do to improve processes and communications with customers?

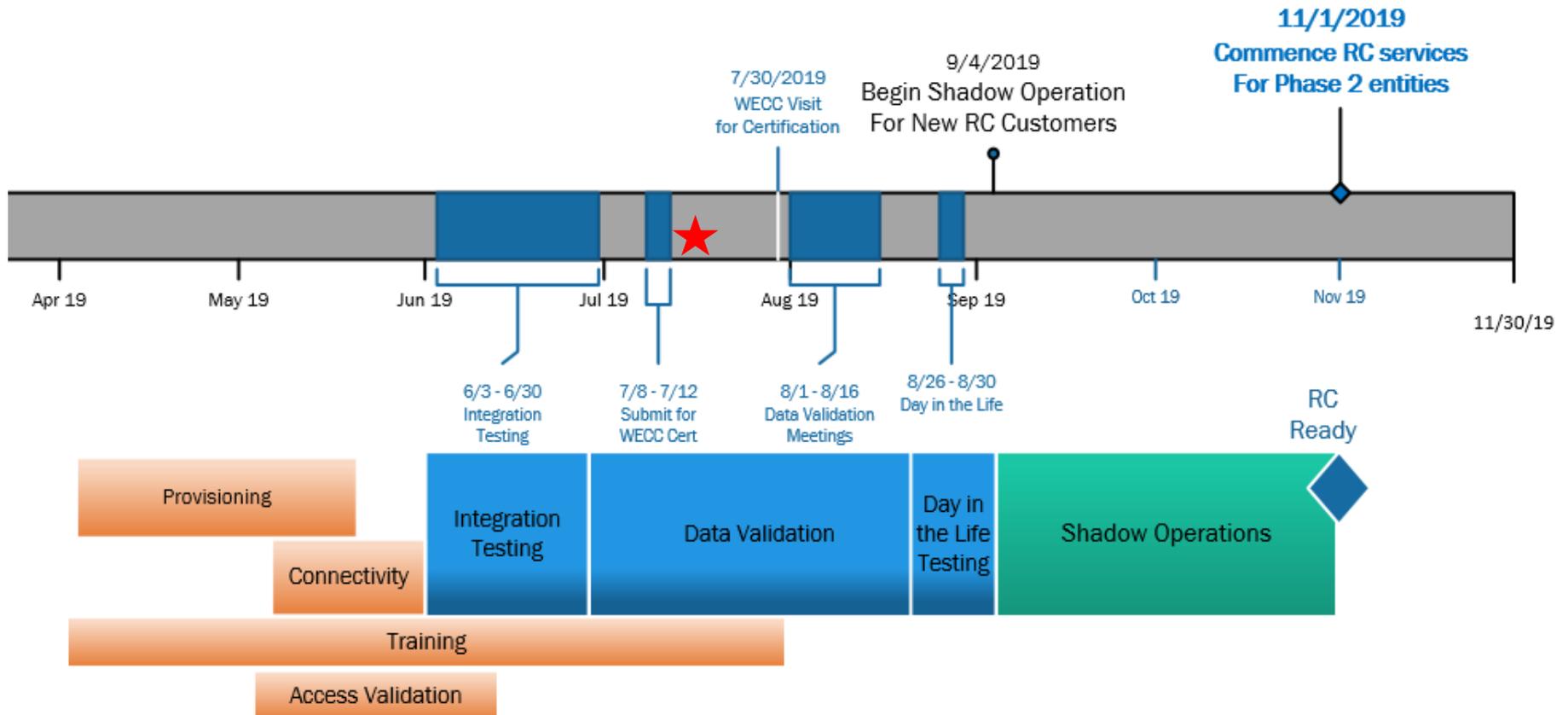
- Onboarding checklist modifications were identified and implemented before phase 2:
 - *Added IRO-010 deliverables, PI Vision integration, and Executive Statement, included timing, responsible party, helpful comments and links.*
- Clearly communicate the expectations for Day in the Life Testing.
 - *Day in the Life testing is 1 week dry run prior to Shadow Operations in MAP Stage*
 - *Customer SMEs should execute processes and data submissions daily for 1 week in the MAP Stage environment*
 - *Complete preparation for normal business process in Shadow Ops, and in Prod*
- Clearly communicate environment transitions and the need to ensure user access for each
- Include URLs and hyper links for website locations in our presentations/webinar materials
- Taking roll call on weekly onboarding webinars so we can reach out to anyone who is not in attendance

Lesson's Learned - Customer's Processes/Communication

What can customers do to ensure a successful RC Transition?

- Ensure representation at weekly webinar/meetings
- Communicate topics/updates to your internal teams
- Review the Contact List on RC Portal and ensure you have representation at all working groups
- Review and understand the Transition Plans when they are provided
 - *Shadow Ops and Production plans will be provided*
- Be prepared to add/modify user access as the systems move from testing to production environments
 - *MAP Stage – June through August for integration testing and data validation*
 - *Stage – September and October for Shadow Operations*
 - *Production – beginning mid October for submissions, but required by November 1*
- Participate in Day in the Life Testing
 - *Day in the Life testing is 1 week dry run prior to Shadow Ops in MAP Stage.*
 - *Customer SMEs should execute processes and data submissions daily for 1 week in the MAP Stage environment.*
 - *Complete preparation for normal business process in Shadow Ops, and in Prod*

RC Participant Onboarding Timeline – Phase 2



Major Milestones and Progress – Phase 2

Dates	Milestone	Status
7/8/19 – 7/26/19	Data Submission for WECC	82% complete <i>(as of 7/16)</i>
7/30/19 – 8/1/19	WECC Visit	RC West preparing
7/22/19 – 8/16/19	Data Validation Meetings	Being scheduled
8/1/19	Post draft Shadow Ops Transition Plan	On Target
8/1/19	Begin provisioning access in Stage for Shadow Ops	
	Begin submitting in Stage for Shadow Ops	
	Day in the Life Testing-Shadow Ops dry run	
9/4/19	Shadow Operations Begins	
9/30/19	Executive Statements Due	

Technology Update

- Network Model – DB91 in production 7/11/19 as planned
 - Includes SRP, SCL, and BPA models
- MRI-S available in MAP Stage for validation, includes:
 - Net Energy Load test submission; due 7/16 using TD 1/1/2020
 - View, download and verify RC and HANA example invoices
 - September 2 – RC West publish HANA services statement for October 1 customers
 - September 30 – Submit production NEL data

Update: RC Operations

Tim Beach
Director, RC West Operations

RC West Operations

- Transition to RC of Record on July 1st
- Daily Conference call with Peak, BCH, AESO
- Facilities forced out with no reliability impacts
- No USF events on Path 66
- No Operating Instructions issued to date
- Fire Reports
- RTCA
- Ridgecrest Earthquakes, no material affect to BES
 - Two non-BES 115kv lines relay
 - 230kV disconnects found unseated during inspection

Procedure Update

- Nov 1st
 - Procedures updated for Nov 1st
 - IROL Guides approved for Nov 1st
 - Stability Guides approved for Nov 1st
- Seams Operating Guides in development
- Inter-area Oscillation Guide
- Procedure reviews

RC West Phase 2 Certification Update

- Documentation submitted to WECC
- Site visit is scheduled for July 30-August 1
 - Expanded footprint in scope
 - RC West Alarms and Displays on new EMS platform
 - Configuration and Beautification work on-going coupled with On-boarding data
- Dry Runs with RC Operators to get ready for the site visit
- Post site visit schedule a DEWG call to discuss date need for shadow ops and go-live

RC West Metrics Development

- Metrics Principles

1. Provide enhanced reliability services to our customers and demonstrate that enhanced level of service

2. Provide feedback to our customers to help them assess the quality of data they are providing to the RC

3. Assess how our operators are performing the RC function

RC Metric Development

- Starting with Peak Metrics
- Enhanced and additional metrics will be developed over time
- Intention to provide metrics by the end of 2019

Update: Settlements for RC West Services

Heather Kelley
Director, Market Services

Settlement Terms

- MRI-S: System used to upload NEL/NG, download informational statement, RC statement, and invoice
- CIDI: Customer inquiry and dispute system is used by participants to submit inquires, and it provides the ISO with the ability to track inquires and provide responses
- Statement: output data file containing quantity, price, and amount calculation results for a specified date
- Invoice: the summation of one or more statements reflecting an invoice payment or charge and due date, published as an output file

Participate in the Data Validation Effort

- Provides RC customers the opportunity to confirm connectivity and become familiar with user interface and settlement files beginning July 9th
- Currently addressing customers questions and challenges encountered
- Help us help you
 - Submit inquiries through the CIDI tool
 - Contact customer service representative
 - Participate in data validation effort and join weekly RC working group conference call
- Additional resources to be available soon
 - Computer based training (CBT) – Ready 7/19
 - MRI-S user guide for RC customers
 - 10 year payment calendar published to website

Annual RC Billing Schedule

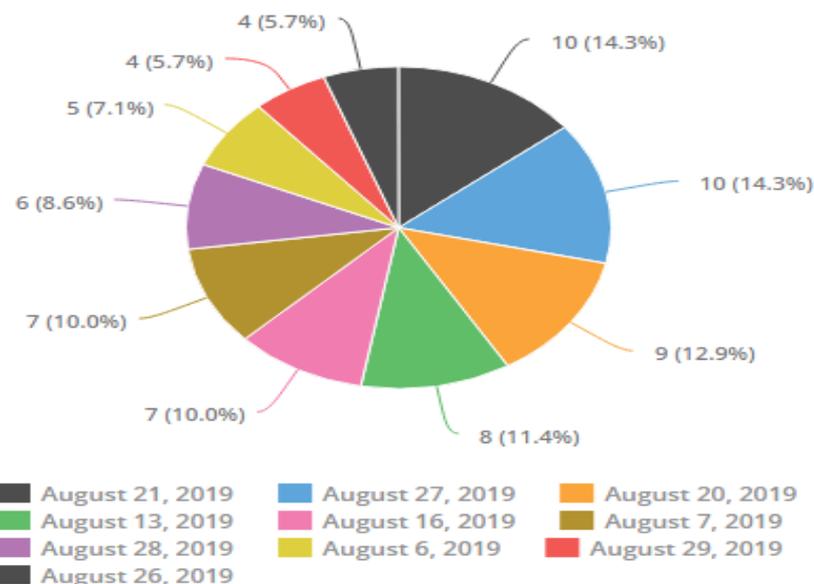
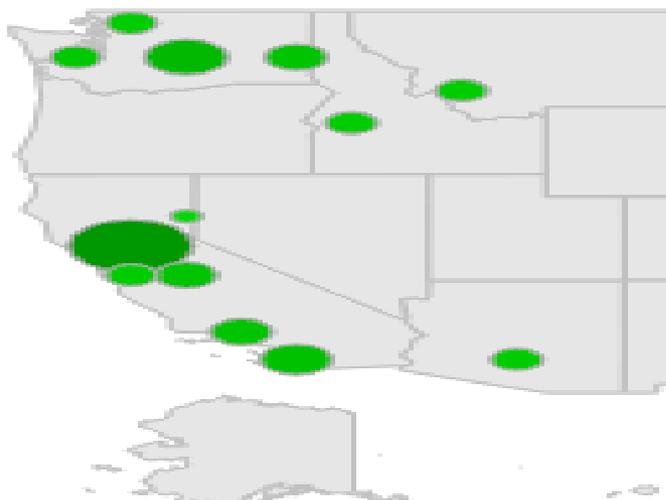
- 9/30/19: **RC Customer** deadline to submit 2018 NEL/NG MWh in MRI-S
- 10/30/19: **RC West** publishes informational statement containing the volumes submitted in MRI-S for review (review period begins)
- 12/2/19: **RC Customer** deadline to validate volumes and re-submit if necessary (review period ends)
- 1/2/20/20: **RC West** publishes a single statement and invoice reflecting 2019 and 2020 RC charges to MRI-S
- 1/31/20: **RC Customer** invoice payment submittal due date

Update: Hosted Advanced Network Applications (HANA)

Gina Wansor
Sr. Client Trainer

HANA – Hands on Training

- HANA Onsite Training in August
 - Target Audience: Train the trainer/Super User
 - Registration is released – 70 participants registered (across 20 organizations)
 - 10 dates across August (2x a week for weeks of August 5th- 23rd, 4x the last week Aug 26th)



Training Update

- HANA WG Webinar
 - July 24, 2019, 11:00 a.m. - Noon PDT
 - Quick update, touch base before training, walkthrough of some of the HANA Visualization features
- Online training
 - CBT ETA is 7/26/19
 - How to Videos – development in progress
 - Animation - development in progress
 - Review fundamental process

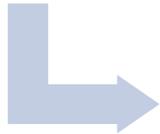
HANA Timeline Review

Now Available

- HANA Base (Read Only RTCA)
- July Customers are in Production
- November Customers in Mapstage

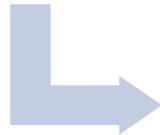
8/6-8/29/19

- HANA Hands On Training



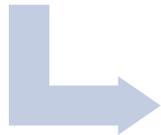
9/1/19

- HANA Visualization and Study available for testing



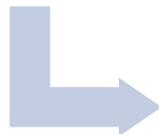
10/1/19

- Customer Validation/Production data in RC West Shadow Operations



11/1/19

- RC West Phase 2 Go-Live!



12/3/19

- Peak HAA terminated

Update: Legal

John Anders
Assistant General Counsel

Non-Conforming RC services agreement with LADWP: FERC Docket No. ER19-2288-000

- Section 3.1 of the *pro forma* RCSA provides for automatic renewal after expiration of the initial term
 - requires authorization by the LA City Council
 - City Council process remains underway
- CAISO and LADWP entered into a non-confirming RCSA with a fixed term of 30 months
 - equal to the minimum term of all other RC customers
- CAISO filed the non-confirming RCSA and requested an effective date of July 1, 2019
 - LADWP filed comments in support (matter pending)

Future Agenda Items

- Determine agenda topics for next public session on August 22, 2019 (webinar only).

Note: Stakeholders can submit agenda topic suggestions for upcoming meetings. Submit to <https://www.surveymonkey.com/r/RCWOCagenda> at least two weeks prior to the next public meeting. Topics may or may not be discussed.

Public Comment