



California ISO

# Reliability Coordinator West Oversight Committee

Public Session

May 21, 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 – 12:50	<b>Briefing:</b> Regulatory liaison role and general matters of interests to the Western Interconnection Regional Advisory Body (WIRAB) regarding RC services	Jordan White - WIRAB
12:50 – 1:05	<b>Update:</b> RC Operations <ul style="list-style-type: none"> <li>• Lessons learned from July customer shadow ops to help transition Nov customers</li> <li>• RTWG update on region-specific operating guides</li> <li>• Status of July 1 certification</li> <li>• Electric Industry Registry (EIR) transition</li> </ul>	Tim Beach – RC West Dede Subakti - CAISO
1:05 – 1:20	<b>Update:</b> Technology <ul style="list-style-type: none"> <li>• Network model</li> </ul>	Janet Morris - CAISO
1:20 – 1:30	<b>Update:</b> Customer onboarding	Ginger Quintavalla - CAISO
1:30 – 1:40	<b>Briefing:</b> Billing estimates for 2020	April Gordon - CAISO
1:40 – 1:50	<b>Briefing:</b> Executive statement of readiness of July customers	Phil Pettingill - CAISO
1:50 – 2:05	<b>Discussion:</b> Possible rejuvenation by WECC of its RC operating committee	All
2:05 – 2:15	Future agenda items	Michelle Cathcart - Chair
2:15 – 2:25	Public comment	
	Public session adjourns	

# Briefing: Regulatory liaison role and general matters of interests to the Western Interconnection Regional Advisory Body (WIRAB) regarding RC services

Jordan White, WIRAB

# Update: RC Operations

Tim Beach  
Director, RC West Operations

Dede Subakti  
Director, Operations Engineering Services

# Shadow Operations- Lesson Learned

- Good communications with Peak, included in a majority of calls
- RTCA results are good, with some minor differences
- EEA 2 Events
- COI- Potential Open Loop Event
- IROL Monitoring- results are consistent
- GMS Messaging System is seeing fair amount of use by BA/TOPs
- ICCP minor data issues
- Moving to second phase of Shadow Ops on June 1st

# RTWG Update- Region Specific Guides

- Surveyed North and South Area BA/TOPS Guide Identification
- Developed IROL and Stability Guides for July 1<sup>st</sup>
- Developing / Revising IROL and Stability Guides for Nov 1<sup>st</sup>
- RTWG developing- criteria which would signal the need for an SOL Operating Guide
- Inter-Area Oscillation Operating Guide- Synchro-Phasor

# Certification Status

July 1, 2019

- Final Certification Report and WECC Certification Letter received on April 23, 2019
  - All bucket 2 items completed
  - Certification Team recommendation of approval and WECC has approved
  - WECC request that NERC approve

November 1, 2019

- Certification package received on May 1, 2019
- Documentation Due on June 28
- Certification on-site visit July 30 – August 1



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# EIR Update

## Changes Needed for Multiple RCs

# NAESB EIR Today

- Web-based industry tool managed by North American Energy Standards Board (NAESB) for which Open Access Technology International, Inc. (OATI) serves as the NAESB chosen system administrator and manages the tool under the webRegistry platform
- Currently the Western Interconnection has one RC registered – Peak
  - Peak uses the “WECC” acronym for RC
  - AESO BA still uses Peak RC in NAESB EIR
- All e-Tags have RC association based on the relationship of BA to RC in the NAESB EIR
  - Static association made at time of e-Tag creation

# NAESB EIR Changes

- RCs creating NAESB EIR transition guide for industry
- Three objectives in evaluating transition:
  1. Determine future structure of RCs in EIR system.
  2. Minimize impacts to ECC, WIT, and other downstream systems from NAESB EIR changes.
  3. Minimize impacts to scheduling for each RC transition.

# NAESB EIR Changes

- All RCs plan to register as RC in NAESB EIR
  - AESO, BCRC, Gridforce, RC West, SPP West
- All BAs will need to change their RC association from Peak to new RC
- Two options for each RC to consider and select
  1. Move RC association to coincide with prescheduling
    - WECC Prescheduling calendar influences two RC transitions
  2. Move RC association on date of record

# RC Transitions in NAESB EIR

	RC West 7/1/2019	BCRC 9/2/2019	RC West 11/1/2019	AESO 11/1/2019	Gridforce 12/3/2019	SPP West 12/3/2019
<b>Selected Option 1 (Prescheduling)</b>	X	X	X		X	
<b>Selected Option 2 (RC Date of Record)</b>				X		X
<b>NAESB EIR Effective Date</b>	6/28/2019	8/30/2019	10/31/2019	11/1/2019	12/2/2019	12/3/2019
<b>Time when new e-Tags are linked to new RC</b>	Jun 27 23:00 PDT	Aug 29 23:00 PDT	Oct 30 23:00 PDT	Nov 1 00:00 MDT	Dec 2 23:00 MST*	Dec 2 23:00 MST*

\*Note: 2019 Fall DST transition to MST/PST occurs on November 3rd

## BA Actions in NAESB EIR

- Each BA will need to change RC in their BA entity code-role record with effective date as shown in the previous slide
  - The actual change can be done ahead of time as long as the effective date matches as shown in the previous slide
- EIR Guide will detail steps BAs must take in NAESB EIR

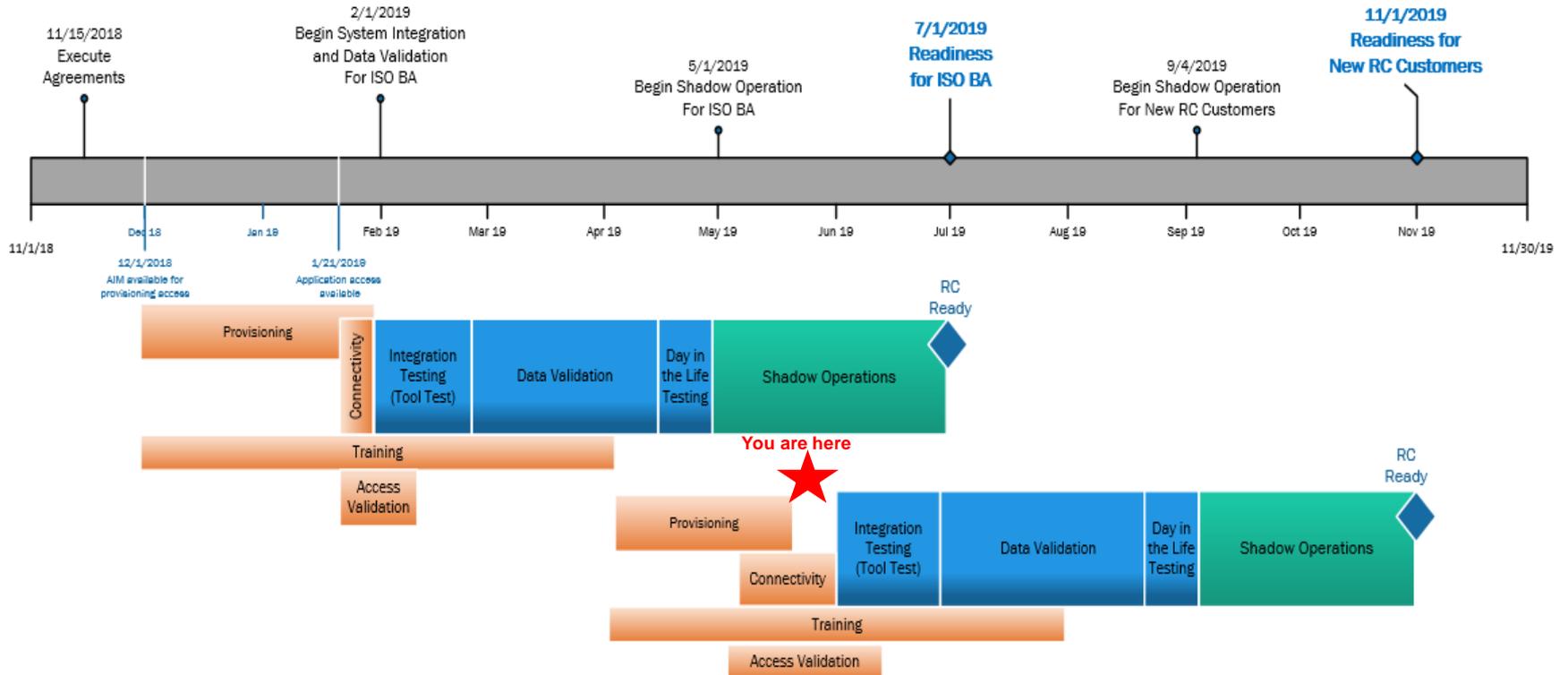
# Peak Deregistration in NAESB EIR

- Peak will either actively or passively allow its NAESB EIR record to cease
  - No BAs associated after Dec. 3, 2019
- Main goal is to ensure no disruption to UFMP process from terminating too early
  - Outstanding e-Tags linked to Peak RC will need replacement

# Update: Technology

Janet Morris  
Executive Director, Project Management Office

# RC Participant Onboarding Timeline has not changed.



# RC Onboarding is on track.

Readiness Criteria	Readiness Category	Timeframe	July Customers		November Customers		Comment
			Status	% complete	Status	% complete	
1	Agreements / Approvals	1 Contract Readiness	Complete	100%	Complete	100%	
2	Network Model Integration	2 Testing Preparation	Complete	100%	On Track	52%	Nov customers encouraged to submit final changes by 5/30 to ensure Shadow Ops readiness
3	Operating Procedures	2 Testing Preparation	Complete	100%	On Track	90%	
4	Operating Guides	2 Testing Preparation	Complete	100%	On Track	50%	
5	Messaging	3 Customer Testing	Complete	100%	On Track		Testing begins for Nov customers on 6/1
6	RC Customer Integration	3 Customer Testing	Complete	100%	On Track		
7	Shadow Operations	4 Shadow Operations	In Progress	35%	On Track		Shadow Operations began 5/1/19 and completes on 6/30
8	Executive Statement	4 Shadow Operations	In Progress	8%	On Track		CAISO letter submitted and 3 July customer letters received.

# RC Services implementation team continues to work diligently to meet critical milestones.

- Technology on Track for 7/1/19
  - RC successfully completed all the critical milestones to start RC shadow Operations on 5/1/19.
  - The RC changes to RIMS targeted to be deployed in Production by 5/20/19.
  - Remaining functional and performance testing for 7/1/19 Go-Live is on track to be completed by 6/14/19.
- Technology on Track for 11/1/19
  - Functionality needed for the end of July RC re-certification is in progress and on track for to be completed by 6/28/19.
  - Settlements changes are in progress and on track.
  - RC to RC integration activities are underway.
- The full network model schedule remains the same as discussed in April.

# Update: Customer Onboarding

Ginger Quintavalla  
Manager, Customer Experience

# Transition to long-term support model

Move communication to steady state while in shadow operations

## **Urgent (reliability)**

- Phone Call
  - RC West Operations Desk
  - Operations Engineer
  - Service Desk
    - Customized phone number

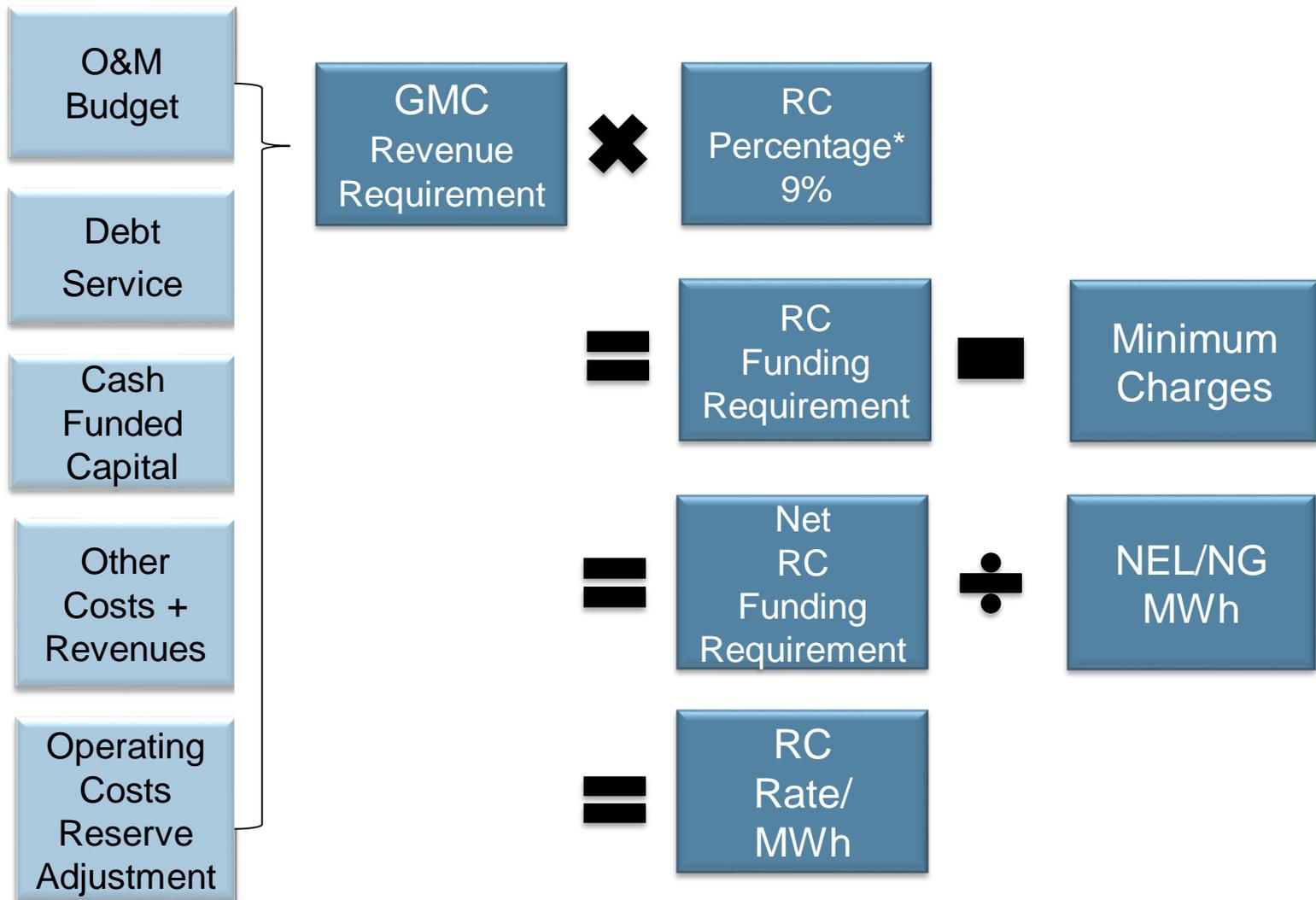
## **Non-Urgent (help or questions)**

- Ticketing System CIDI
  - Auto Routing
  - Access to knowledge articles
  - Updates and tracking

# Briefing: Billing Estimates for 2020

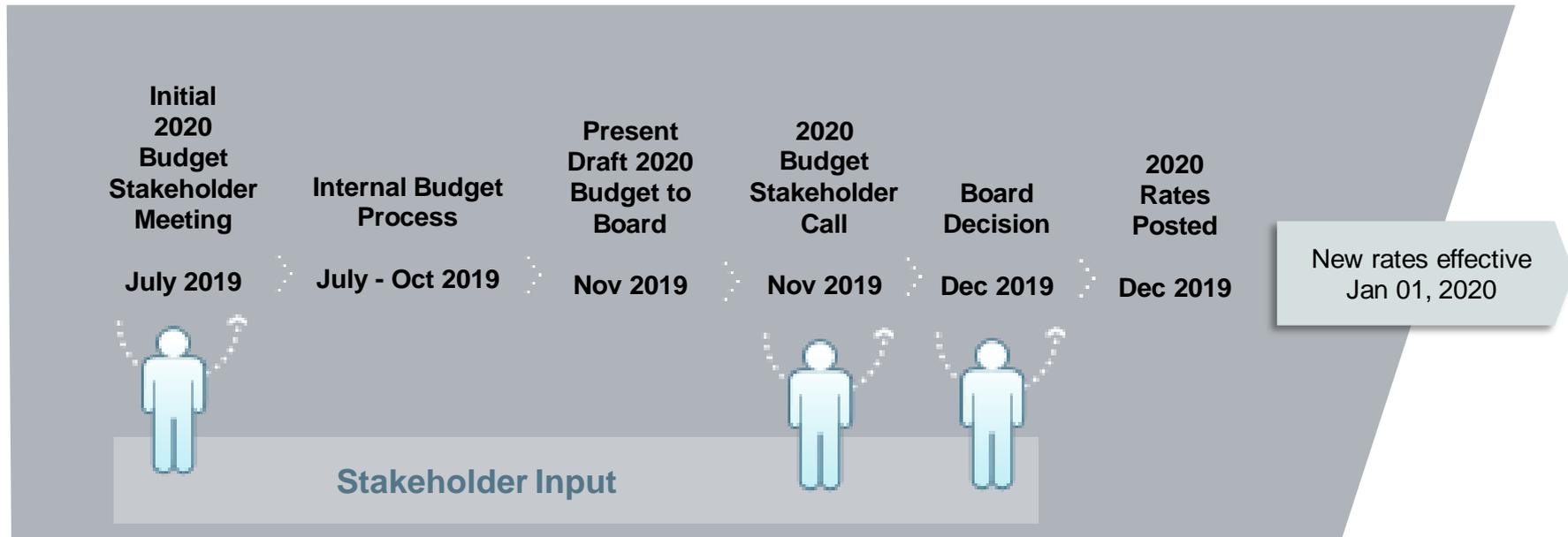
April Gordon  
Director, Financial Planning and Procurement

# GMC Revenue Requirement and RC Rate Overview



*\*Per RC Rate Design, Terms and Conditions FERC Tariff Filing*

# 2020 GMC Revenue Requirement and Rates Timeline



## 2020 RC Billing Cycle

- 9/30/19 **RC Customer** deadline to submit 2018 NEL/NG MWh in MRI-S
- 10/31/19 **RC West** releases Information Statement which lists volumes provided in MRI-S for review prior to invoicing
- 11/27/19 **RC Customer** deadline to validate volumes on Information Statement
- 1/2/20 **RC West** bills for 2019 and 2020 RC Charges
- » The 2019 RC charges will be prorated and based on 2017 NEL/NG MWh
  - » The 2020 RC charges will be based on 2018 NEL/NG MWh
  - » Charges will be on one invoice available in MRI-S
- 1/31/20 **RC Customer** payment due date
- » Federal entity payments are due monthly in 1/12 increments

# Estimated 2019 and 2020 RC Rates

## 2019 RC Rates\*

Period 1 (7/1/19 thru 10/31/19)

\$0.0134/MWh

Period 2 (11/1/19 – 12/31/19)

\$0.0273/MWh

\*2019 rates subject to change based on actual 2019 RC West footprint.

## 2020 RC Rate\*\*

Annual Charge (1/1/20 – 12/31/20)

\$0.028/MWh - \$0.029/MWh

\*\*2020 rate subject to change based on actual 2020 RC West footprint and final 2020 GMC revenue requirement.

# HANA Invoices

- HANA invoices go out 30-days prior to Customer's official HANA start date.
  - Annual recurring invoices will be sent out 30-days prior to Customer's anniversary date.
  - Invoices will be available in MRI-S
  - Payments are due 21 business days from invoice date.
- Supplemental invoices will go out during the year if Customer elects to purchase additional subscriptions.
  - Charges will be prorated to co-term to original anniversary date.

# Briefing: Executive statement of readiness of July customers

Phil Pettingill  
Director, Regional Integration

# Executive Statement and RC Readiness Criteria

- Per CAISO [tariff](#) and [Business Practice Manual](#) for RC Services, an **Executive Statement of Readiness** is to be provided by each onboarding customer and RC West, no later than 30 days prior to RC West becoming RC of Record (**no later than May 31, 2019**).
- Email request was sent to the Oversight Committee on 5/1/19. The executive statement [template](#) is available on the RC Portal - Go to the Oversight Committee webpage / Readiness Criteria and Evidence folder.
- CAISO anticipates submitting our executive statement mid-May.
- Letter confirms that the entities processes and systems have satisfied, or will have satisfied, the readiness criteria for RC Services.
- Scan and email signed letters to [RCWest-OC.com](#)\*

\*Note: A new email address has been created for the RC West Oversight Committee. Please use this email going forward to communicate to committee members.

Company Logo Address
An example of the executive statement for readiness related to RC Customer onboarding is included below.
Dear CAISO Representative,
This statement provides notice that [RC Customer]'s processes and systems have satisfied or will have satisfied the readiness criteria set forth in the Business Practice Manual for RC Services, [with or without] exception from the readiness criteria specified in the Business Practice Manual for RC Services [and that despite such exceptions the criteria will be met]. This statement is conditional on [the resolution of any known issues and] any unforeseen issues that undermine the satisfaction of the readiness criteria.
If, subsequent to this statement, [RC Customer] determines that it cannot proceed with implementation on the RC Services Date, [RC Customer] will notify the CAISO of the delay, the reason for the delay, and the proposed new RC Services Date, if it can be determined, and whether it will need to re-issue a portion or all of the readiness statement.
Sincerely, [RC Customer] Senior Executive

# Discussion: Possible rejuvenation by WECC of its RC operating committee

## Future Agenda Items

- Determine agenda topics for next public session on June 18, 2019 (webinar only)

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

# Public Comment