California ISO

Settlement User Group

Sep 11, 2024 — 10:00 a.m. – 11:00 a.m. (Pacific Time)

Web Conference Information	Conference Call Information
Web Address: https://caiso.webex.com/meet/settlementuser Meeting Number: 961 854 046 Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter your phone number you will use during the call.	US Toll Free: 1-844-621-3956 US Toll : 1- 650-479-3208 Access Code: 961 854 046

Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publically available on the ISO web page for a limited time following the meeting. The recording, and any related transcriptions, should not be reprinted without the ISO's permission. Hyperlinks in blue in PDF version.

The recording will be posted on our website and be available for a short period of time until September 25th, 2024. Please mute your phone

while the discussion is going on in order to eliminate background noise, to unmute press and hold the spacebar to

temporarily unmute, double mute. Calls are structured to stimulate an honest dialogue and engage different perspectives.

To ask a question after each topic, unmute yourself before asking your question, or enter question on the chat

please state your name and affiliation. Thank you.

mute

Settlement User Group Agenda

Wednesday, Sep 11, 2024   10:00 a.m. – 11:00 a.m. (Pacific Time)

Time	Topic	Presenter
▪ 10:00 – 10:02	▪ Welcome and Introduction	▪ Massih Ahmadi
▪ 10:02 – 11:00	▪ Settlements	
	▪ 2024 Fall Release Milestones	▪ Massih Ahmadi
	▪ Market Sim Calendar	▪ Assad Al-Baijat
	▪ BPM/PRR Fall Release	▪ Massih Ahmadi
	▪ Symposium	▪ Massih Ahmadi
	▪ Training	▪ Massih Ahmadi

Presenters

Unmute

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2024 Fall Release Milestones

Release Milestones:

✓ 1st draft config output file + release component summary posted: **8/13/24 - Completed, notification sent**

✓ PRR/BPM have been posted: **8/27/24 - Completed, notification sent**

✓ 2nd draft config output file + revised release component summary posted: **9/4/24 – Completed, notification sent**

• Market sim/sample statement window: **9/16 – 10/14**

• Pre-prod configuration output file + release artifact revisions targeting: **10/23**

• Anticipated prod activation: **11/1**

Market Simulation Fall 2024 Calendar (MAP STAGE)

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Market Simulation Fall 2024 Calendar (MAP STAGE)
Sept 16, 2024 through Oct 14, 2024

Calendar Day	Day	CMRI T+1B	Submit Meter Data by T+2B 10:00 for Initial	Publish Initial Statement T+5B	Submit Meter Data by T+5B 18:00 for Recalc	Publish Recalc Statement T+8B	Publish Market Invoice
			T+9B	T+9B	T+70B	T+70B	
16-Sep-24	Monday						
17-Sep-24	Tuesday						
18-Sep-24	Wednesday	17-Sep					
19-Sep-24	Thursday		17-Sep				
20-Sep-24	Friday	19-Sep					
21-Sep-24	Saturday						
22-Sep-24	Sunday						
23-Sep-24	Monday		19-Sep				
24-Sep-24	Tuesday			17-Sep	17-Sep		
25-Sep-24	Wednesday	24-Sep					
26-Sep-24	Thursday		24-Sep	19-Sep	19-Sep		
27-Sep-24	Friday	26-Sep		Monthly Initial 17-Sep - 19-Sep		17-Sep	Daily Initial 17-Sep; Daily Initial 19-Sep; Monthly Initial 17-Sep - 19-Sep
28-Sep-24	Saturday						
29-Sep-24	Sunday						
30-Sep-24	Monday		26-Sep				
01-Oct-24	Tuesday			24-Sep	24-Sep	19-Sep	
02-Oct-24	Wednesday	1-Oct				Monthly Recalc 17-Sep - 19-Sep	Daily Recalc 17-Sep; Daily Recalc 19-Sep; Monthly Recalc 17-Sep - 19-Sep
03-Oct-24	Thursday		1-Oct	26-Sep	26-Sep		
04-Oct-24	Friday	3-Oct		Monthly Initial 24-Sep - 26-Sep		24-Sep	Daily Initial 24-Sep; Daily Initial 26-Sep; Monthly Initial 24-Sep - 26-Sep
05-Oct-24	Saturday						
06-Oct-24	Sunday						
07-Oct-24	Monday		3-Oct				
08-Oct-24	Tuesday			1-Oct	1-Oct	26-Sep	
09-Oct-24	Wednesday	8-Oct				Monthly Recalc 24-Sep - 26-Sep	Daily Recalc 24-Sep; Daily Recalc 26-Sep; Monthly Recalc 24-Sep - 26-Sep
10-Oct-24	Thursday		8-Oct	3-Oct	3-Oct		
11-Oct-24	Friday	10-Oct		Monthly Initial 01-Oct - 03-Oct		1-Oct	Daily Initial 01-Oct; Daily Initial 03-Oct; Monthly Initial 01-Oct - 03-Oct;
12-Oct-24	Saturday						
13-Oct-24	Sunday						
14-Oct-24	Monday		10-Oct				
15-Oct-24	Tuesday			8-Oct	8-Oct	3-Oct	
16-Oct-24	Wednesday					Monthly Recalc 01-Oct - 03-Oct	Daily Recalc 01-Oct; Daily Recalc 03-Oct; Monthly Recalc 01-Oct - 03-Oct;
17-Oct-24	Thursday			10-Oct	10-Oct		
18-Oct-24	Friday			Monthly Initial 08-Oct - 10-Oct		8-Oct	Daily Initial 08-Oct; Daily Initial 10-Oct; Monthly Initial 08-Oct - 10-Oct;

PRR and BPM Updates

Posted on BPM site. These PRRs will be discussed in Sep/Oct BPM calls

PRR	PRR Title	Stage
1583	COTP Loss - Defect: Apply losses for the California Oregon Transmission Project (COTP) scheduled into the California Independent System Operator Corporation (CAISO) Balancing Authority Area using COTP capacity made available by Pacific Gas and Electric Company (PG&E) and the Transmission Agency of Northern California (TANC) consistent with the CAISO Tariff.	Initial
1584	RAAIM LESR - Defect: Revise the Generic Availability and Flexible Obligation calculations for Limited Energy Storage Resources (LESR) RA resources. Consistent with how generic obligation award is computed only for positive capacity, the generic availability will recognize only bids/availability for the capacity above zero.	Initial
1585	TSMSP2 - When updates (with a 6/1/2024 Effective Date) associated with the TSMSP2 project were released to Production with the Summer 2024 Release a defect discovered that entities with ATC Reservations are seeing a doubling of the export quantities associated with that intertie.	Initial

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REGISTRATION IS OPEN

2024 STAKEHOLDER SYMPOSIUM

Welcome reception - Oct. 29
at Kimpton Sawyer Hotel, Sacramento, CA

Symposium program - Oct. 30
SAFE Credit Union Convention Center
Sacramento, CA

Visit the event website: www.reg.eventmobi.com/2024stakeholdersymposium

SPONSORSHIP OPPORTUNITIES AVAILABLE

ISO Training Schedule

Training Course	Date and time
FERC 2222 Webinar	**Sept. 12th, 2024 9:00 am – 10:00am**
Pre-Market Simulation Webinar Training: Transmission Service and Market Scheduling Priorities-Phase 2 (TSMSP 2) Track 3	**Sept. 26th, 2024 9:00am-10:00am**

Use our Pre-Training Release Survey to submit topics that you would like to see covered in the upcoming training.

Are you looking for more training?

The ISO Training Center has computer based training available for lots of topics. Check out the Learning Center: https://www.caiso.com/stakeholder/training

California ISO

CustomerReadiness@caiso.com

Next SUG Meeting: September 25th, 2024 at 10:00 A.M

Stay Connected!

- WebEx
- CAISO.com
- Salesforce Customer Inquiry, Dispute & Information (CIDI)
- Settlement user @caiso.com

Settlement User Group Calendar 2024

January

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

July

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

August

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Legend: ■ Meeting ■ Holiday

Settlement User Group

Thank you for participating in our call

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