



Western Energy Imbalance Market - Scheduling Coordinator Meter Entity (WEIM SCME)

Welcome

Our presentation will begin shortly.

Today's Presenter: Priyanka Namburi

Step 1: Provisioning to be a User Access Administrator (UAA)

Needs RIMS Contract Action: EIM Contracts Not Completed

Summary

A RIMS contract is required to create new projects in RIMS.

Action

Reach out to your organization's onboarding specialist for instructions on how to submit a User Access Agreement form.

Resource

[UAA webpage](#)



Has RIMS Contract Requirement: EIM Contracts Signed

Summary

The RIMS contract and associated project number is already on your organization's profile.

Action

Reach out to your UAA and have them provide RIMS access.

Resource

[AIM User Guide](#)

Scenarios to Consider



1

Unfinalized Contract

Until your organization's contract is finalized, you will need to wait before you see the EIM contracts for provisioning.

2

UAA Cert Expired

Please reach out the UAARRequests@caiso.com to see eligibility of reactivating certificate or if a new certificate is required to be created.

3

No Active UAA/ UAA Left

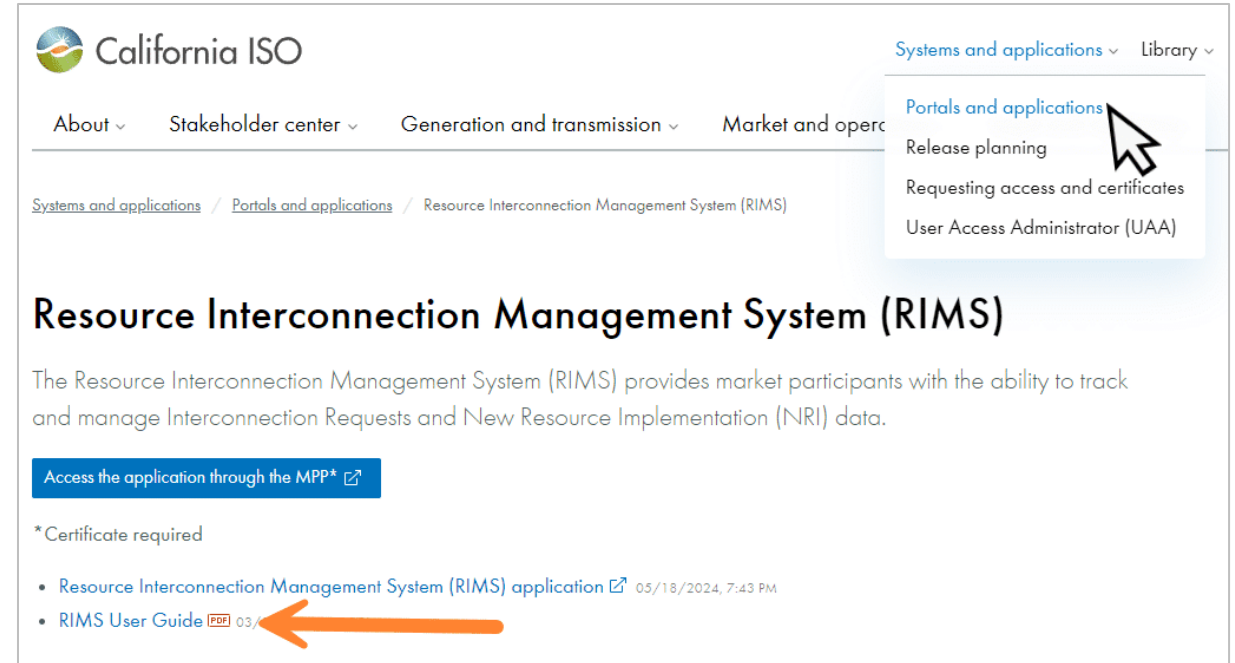
If the contracts are finalized and there is no active UAA/Previous UAA left, please contact UAARRequests@caiso.com for assistance

Resource Interconnection Management System (RIMS) Resources

The [RIMS User Guide](#) is a great resource for reviewing the system's features and best practices.

As a RIMS user, you will have the ability to:

- View/Edit/Upload project documents
- View contact information for projects
- Receive Full Network Model (FNM) progress reports

A screenshot of the California ISO website's Resource Interconnection Management System (RIMS) page. The page features a header with the California ISO logo and navigation links: About, Stakeholder center, Generation and transmission, and Market and operations. A dropdown menu for 'Systems and applications' is open, showing 'Portals and applications' with sub-links for 'Release planning', 'Requesting access and certificates', and 'User Access Administrator (UAA)'. The main content area is titled 'Resource Interconnection Management System (RIMS)' and describes the system's purpose. A blue button labeled 'Access the application through the MPP*' is present. Below this, a note states '*Certificate required'. A list of links includes 'Resource Interconnection Management System (RIMS) application' and 'RIMS User Guide', with an orange arrow pointing to the latter. The page also shows a timestamp of 05/18/2024, 7:43 PM.

California ISO

Systems and applications ▾ Library ▾

Portals and applications ▾
Release planning
Requesting access and certificates
User Access Administrator (UAA)

About ▾ Stakeholder center ▾ Generation and transmission ▾ Market and operations ▾

[Systems and applications](#) / [Portals and applications](#) / Resource Interconnection Management System (RIMS)

Resource Interconnection Management System (RIMS)


The Resource Interconnection Management System (RIMS) provides market participants with the ability to track and manage Interconnection Requests and New Resource Implementation (NRI) data.

[Access the application through the MPP*](#)

*Certificate required

- [Resource Interconnection Management System \(RIMS\) application](#) 05/18/2024, 7:43 PM
- [RIMS User Guide](#)

Navigating in RIMS

 California ISO | Resource Interconnection Management System

Global DashboardApp & StudyMPAIToolsReporting

MPAI DashboardGenerationPTO Trans DashboardTransmissionInternal ProjectsReliabilityCoordinator

SCME Project Upload

SCME Bulk Upload

Uploaded Files

Document Type	File Name	Sharepoint Link	Uploaded Status	User	Upload Date
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Download Template

Template
Gen SCME Bulk Data Upload Template

Download

Reliability Coordinator DashboardSCME DashboardSCME Project Bulk Upload

SCME tabs are under Reliability Coordinator

Step 2: Download and Complete SCME Bulk Data Upload Template

Navigation: RIMS > MPAI > SCME Project Bulk Upload

SCME Project Upload

▶ SCME Bulk Upload

Uploaded Files

Document Type	File Name	Sharepoint Link	Uploaded Status	User	Uploaded Date
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▶ Download Template

Template	
Gen SCME Bulk Data Upload Template	<div>Download</div>

Navigate to the **SCME Project Upload** section in RIMS.

Download the *Bulk Data Upload Template*.

SCME Bulk Data Upload Template Spreadsheet High Level

What is it?

Downloadable spreadsheet that collects information on your organization's project and will be uploaded to RIMS:

- Project Information
- NRI Contact Information
- EMS Information

When do I complete this?

After gaining access to RIMS, users will be able to access this spreadsheet. Be sure to follow the important note below!

Template Version		1.2											
To add additional projects, copy row 7 and paste after last row that has data													
Project Information										NRI Contact Inform			
Project Number [ISO ONLY FIELD - Type NEW if New Project]	Project Status [Leave Blank if New Project]	Pr					Connection Voltage	Project Contact Name	Project Contact Phone Number	Authorized Con			

Important Note

The <Short Name> will need to match the SCID tied to a users certificate in order for the project to be created.

< short name >

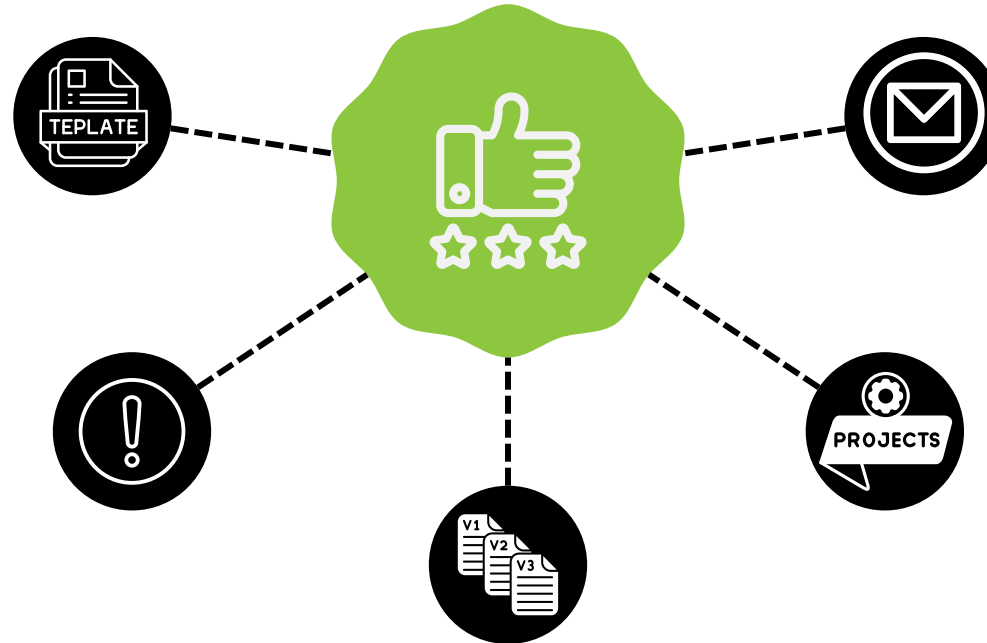
Helpful Tips for SCME Bulk Data Upload Template

Check Template Version

Always check the RIMS RC Templates to verify you are using the latest Bulk Loader Spreadsheet.

Required Fields

All fields for columns C-K must be completed (e.g., *Project Information* and *NRI Contract Information*). The form will not be processed if there is data missing.



Submissions

Version each new submittal to RIMS.

Questions

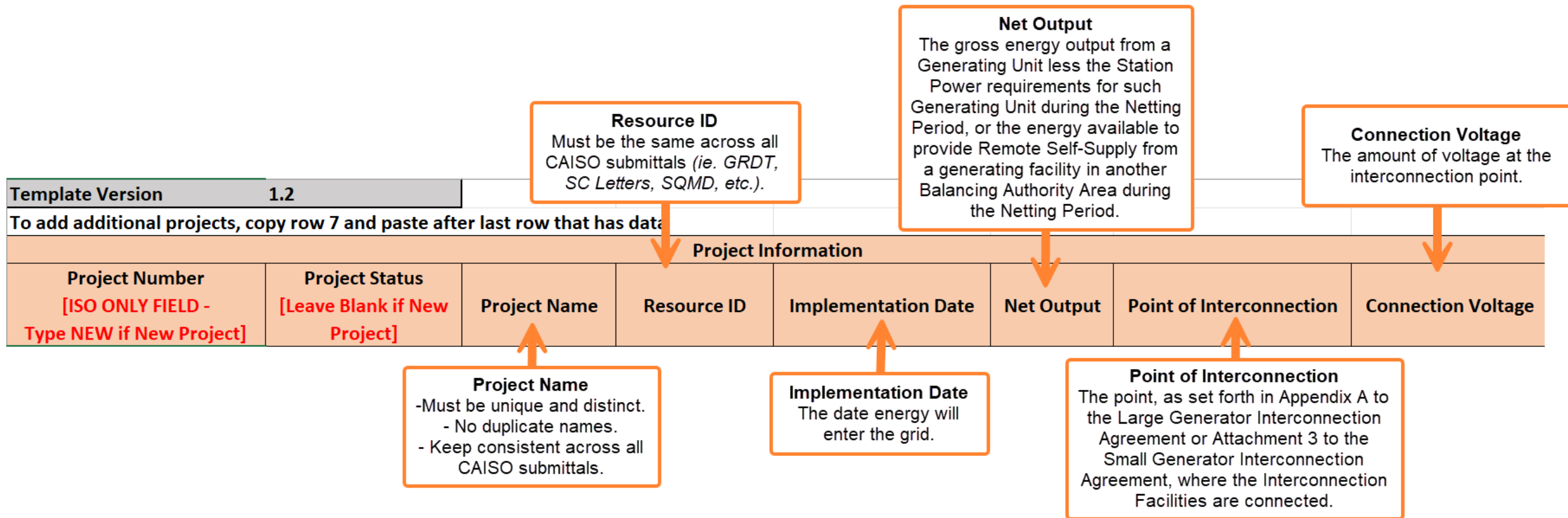
Email NRI@CAISO.com if you have any questions on how to complete or update the form.

Project Naming

Give distinctive names to each of your projects so they are easier to track.

Please note: There is a “Instructions and Revisions” tab on the template for additional details.

Filling out the SCME Bulk Data Upload Template – Project Information



Please note: These fields are required to be fill out prior to submittal.

SCME Bulk Data Upload Template – NRI Contact Information

NRI Contact Information		
Project Contact Name	Project Contact Phone Number	Authorized Contact Email Address (can be multiple - separate by semi colon)

Project Contact Name & Contact Number
Provide **one** main Project Contact and Project Contact Phone Number.

Authorized Contact Email Address
May provide **multiple** emails. Separate each email with an semi-colon ;

Please note: These fields are required to be fill out prior to submittal.

SCME Bulk Data Upload Template – EMS Information

EMS Information		
Latitude*Note: if a Load Resource Enter the number 0	Longitude*Note: if a Load Resource Enter the number 0	Nearest Substation





Latitude and Longitude
1. For Load Resource, enter the number 0 for the Latitude and Longitude.
2. Should be in Decimal Degrees format.

Step 4: Upload the SCME Bulk Data Upload Template

SCME Project Upload




▶ SCME Bulk Upload

Uploaded Files



Document Type	File Name	Sharepoint Link	Uploaded Status	User	Uploaded Date
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▶ Download Template



Template	
Gen SCME Bulk Data Upload Template	<div>Download</div>

After filling out the *SCME Bulk Data Upload Template*, you will be ready to upload.

Reviewing RIMS Functionalities – Submitting Project Documents

Navigation: RIMS > MPAI > SCME Dashboard > Select associated project

Bucket Items are all the documents that need to be submitted for your project. Review the [NRI checklist](#) for the list of bucket deliverables.

NRI Bucket File Names: Project code + Title of Deliverable + Version Number. Review the “[Quick Reference File Naming Conventions](#)” in the NRI guide for the appropriate file name for each submitted document.

1 Scroll down to **Documents** section

2 Click **Upload Project Files**

3 Click **Choose File** and find your Bucket Deliverable

4 Click **Upload**. Some files may take some time.

5 **Upload Status** will say "SUCCESS" when successfully uploaded. If other statuses like "ERROR" or "PENDING", please reach out to NewResourceImplementation@caiso.com

6 Scroll up to the **Bucket Notes** section. Approval status will appear here once CAISO reviews.

Document Group	Document Type	File Name	Sharepoint Link	Uploaded Status	User	Uploaded Date	Comment
PDF	Project Details Form	61514D PDF Test 2 Elm Street DERA C.docx		SUCCESS	CAWAGNER	12/23/2024	0 Comments

Bucket Item Name	Bucket Notes
SLD	File Received 24DERA39829 SLD Ver1.pdf

Reviewing RIMS Functionalities – Updating Project Documents

Updates Available in RIMS: Any section that is not grayed out will allow you to update the RIMS User Interface (UI). This will show either as free text or by selecting a pencil icon to make edits.

Updates Not in RIMS: Some sections will be grayed out and will not allow changes through the RIMS UI. To request a change to a grayed-out field, please email NRI@caiso.com.

Examples of fields you can edit and ensure is up to date.

Use the Pencil Icon to edit.

Point of Interconnection:

Megawatt By Fuel Type

Configuration Type:

Fuel Type and Megawatt

Index	Fuel Type	Net MW	MWh	PMin	Forecast Election
1	Wind	25			
2	[None]	0			
3	[None]	0			
4	[None]	0			

Ancillary Services Requested

AGC: | Spin: | Non-Spin:

Impl Date Info

Estimated Implementation Date (MM/DD/YYYY):

Commercial Operation Date (MM/DD/YYYY):

SC Information

SCID: SC Name:

Regulatory Contracts Contacts

Type	First Name	Last Name	Title	Organization	Phone	Email	Address	City
NRI Primary	Sue	Sue	Project Manager	Test MA Corp	9169169161	test@abc.com		
NRI Secondary	Stan	Stan	CEO	TestMA Corp	9169169161	test@abc.com		

Resource Address and Phone Number

Street Address:

City:

County:

State:

Zip Code:

Latitude(calc):

Longitude(cal):

Control Room Phone#:

Legal Address

Legal Name:

Street Address:

City:

State:

Zip Code:

Example of fields you cannot edit - email NRI@caiso.com for help.

Reviewing RIMS Functionalities – Monitoring Project Documents

Your project team will receive updates and action items from the ISO and will be alerted via project memo emails, which are automatically sent at **10 a.m. PPT**.

Remember, RIMS will be where you can find things like bucket items, statuses, model build, resource ID, as well as comments from the NRI team.

Project Memo: Notes from the ISO such as details about why something was rejected or information requests or schedule updates

Bucket Items: What Deliverables required for what Bucket and approval status

Bucket Notes: Deliverable submittal and review updates

Phase Completion: Monitor completion and approval status

Ancillary Services Requested

AGC: ☐ No ☐ Spin: ☐ No ☐ Non-Spin: ☐ No

Impl Date Info

Estimated Implementation Date (MM/DD/YYYY): 12/27/2022
Commercial Operation Date (MM/DD/YYYY): 01/15/2023

SC Information

SCID: [None] SC Name:

Project Memo

Comments

Comments	Updated By	Updated Date
PROJECT HAS PASSED TARGETED IMPLEMENTATION DATE- PLEASE UPDATE THE ESTIMATED IMPLEMENTATION DATE AND COO DATE OR PROVIDE STATUS UPDATE TO NRI@CAISO.COM	NNASSER	01/10/2023 13:45
test doc	MARECHAVELETA	09/21/2021 09:41
Test File (MA)	MARECHAVELETA	06/23/2020 08:25
Test File (MA)	MARECHAVELETA	06/23/2020 08:21
Test File (MA)	MARECHAVELETA	06/23/2020 08:21
Test File (MA)	MARECHAVELETA	06/23/2020 08:18
Test File (MA)	MARECHAVELETA	06/23/2020 08:18
Test File (MA)	MARECHAVELETA	06/23/2020 08:17
Test File (MA)	MARECHAVELETA	06/23/2020 08:17
Test File (MA)	MARECHAVELETA	06/23/2020 08:16
Test File (MA)	MARECHAVELETA	06/23/2020 08:12
Test File (MA)	MARECHAVELETA	06/23/2020 08:11
Test File (MA)	MARECHAVELETA	06/23/2020 08:11

Bucket Items

BUCKET 1 08/25/2022

Bucket Item Name	Required?	File Accepted?
SLD	Yes	Yes
Attestation	No	No
IA	Yes	Yes
SLD	Yes	Yes
CommBlock	Yes	Yes
RIGDetails	Yes	Yes
DYNGEN	Yes	Yes
PSLF	Yes	Yes
NetAppInfo	Yes	Yes
TopoMap	Yes	Yes
SiteInfo	Yes	Yes

BUCKET 2 08/25/2022

Bucket Item Name	Required?	File Accepted?
MeterConfig	Yes	Yes

BUCKET 3 11/27/2022

Bucket Item Name	Required?	File Accepted?
FinalGRDT	Yes	Yes
GRDT Explanation	No	No
PIRPLDI	Yes	No
CECPreCert	Yes	No
ControlProtection	No	No
ControlProtectionInverter	No	No
SCSelection	Yes	No
SCAcceptance	Yes	No
24HourContact	Yes	No
CPSAgreement	Yes	No
ECNAgreement	Yes	No

BUCKET 4 12/17/2022

Bucket Item Name	Required?	File Accepted?
PTO Sync Approval	Yes	No

BUCKET 5 12/26/2022

Bucket Item Name	Required?	File Accepted?
PORCalc	No	No
MSVS	Yes	No
Final Control Protection	No	No
UCP	No	No

Bucket Notes

Bucket Item Name	Bucket Notes	Updated By	Updated Date
SCAcceptance	File Not Accepted 180ENT182 SCAcceptance Ver1.pdf.xlsm	MARECHAVELETA	09/21/2021
SCAcceptance	File Received 180ENT182 SCAcceptance Ver1.pdf.xlsm	RPRODUCTIONX15466	09/21/2021
FinalGRDT	File Accepted 180ENT182 FinalGRDT Ver1.xlsx	MARECHAVELETA	06/23/2020
FinalGRDT	File Received 180ENT182 FinalGRDT Ver1.xlsx	RPRODUCTIONX15466	06/23/2020
MeterConfig	File Accepted 180ENT182 MeterConfig 000000 Ver1.docx	MARECHAVELETA	06/23/2020
MeterConfig	File Received 180ENT182 MeterConfig 000000 Ver1.docx	RPRODUCTIONX15466	06/23/2020
TopoMap	File Accepted 180ENT182 TopoMap Ver1.pdf	MARECHAVELETA	06/23/2020
SiteInfo	File Accepted 180ENT182 SiteInfo Ver1.xlsx	MARECHAVELETA	06/23/2020
TopoMap	File Received 180ENT182 TopoMap Ver1.pdf	RPRODUCTIONX15466	06/23/2020
SiteInfo	File Received 180ENT182 SiteInfo Ver1.xlsx	RPRODUCTIONX15466	06/23/2020

Phase Completion (COM/COD/Completion)

Phase Completion (COM/COD/Completion)

Phase Label	Project MW	Additional MW	COM MW	Phase Date	Phase Status
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Regulatory Contracts Contacts

Monitor Internal Sync/COD/COM/QF/Conversion Approval Process

Monitor Approval Process

Business Unit	Request Type	Approval Status	Approver	Approval Date
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Reference Links

New Resource Implementation (NRI) Guide:

- <https://www.caiso.com/documents/new-resource-implementation-guide.pdf>

NRI Checklist:

- <https://www.caiso.com/documents/newresourceimplementationchecklist.xlsx>

RIMS User Guide:

- <https://www.caiso.com/documents/rimsuserguide.pdf>

Settlement Quality Meter Data (SMD) Plan submission process:

- <https://www.caiso.com/documents/5750.pdf>

Western Energy Markets Resources:

- <https://www.westerneim.com/Pages/Resources.aspx>

WEIM Procedure to set up new Non-Participating Resources and Participating Resources or End Date/Remove Resources:

- <https://www.westerneim.com/Documents/Western-Energy-Imbalance-Market-Procedure-For-Non-Participating-And-Participating-Resources.pdf>