
	Reliability Coordinator Procedure	Procedure No.	RC0540A
		Version No.	1.3
		Effective Date	5/01/25
RC West WIT Schedule Change Process		Distribution Restriction: None	

Table of Contents

Background.....	2
Step 1: Confirm access to submit request.....	2
Step 2: Request access to the application.....	2
Step 3: Submit request in WIT Schedule Change via CIDI Ticket.....	3
Step 4: Submit request in WIT Schedule Change via email.....	7
Step 5: WIT Schedule Change is Completed.....	7
Supporting Information.....	7
Operationally Affected Parties.....	7
Version History.....	7
Periodic Review Procedure.....	8
Review Criteria & Incorporation of Changes.....	8
Frequency.....	8

	Reliability Coordinator Procedure	Procedure No. RC0540A
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Background

This Procedure Attachment provides the steps for entities to submit a Western Interchange Tool (WIT) Schedule Change Request. As the primary means to confirm Net Schedule Interchange (NSI) for Preschedule, next-hour, current-hour, past-hour and past-day checkout, WIT may require a change when editing the E-Tag is not possible. Following the WECC After-the-Fact (ATF) Guideline: WECC Interchange Tool (WIT) Checkout Guidelines, the BA requesting change receives approval from all **Balancing Authorities (BAs)** and **Transmission Service Providers (TSPs)** and the WIT Schedule Change Request form is signed by all parties.

WIT Schedule Change Request Form link:

[wecc-interchange-tool-schedule-change-request-form.xlsx](#)

The requesting BA (sink or source) shall follow the request process outlined below. The WIT Admin communicates back to all approving entities that the schedule change has been made in the WIT.

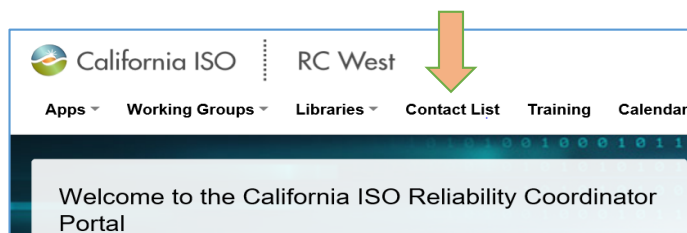
Step 1: Confirm access to submit request

In order to submit the WIT Schedule Change request, RC West customers must have access to the Customer Inquiry Dispute Information (CIDI) application. For entities that are not RC West customers, please skip to [Step 4](#).


Step 2: Request access to the application

Access to this application shall be provisioned in the Access Identity Management (AIM) application by the User Access Administrator (UAA). If you do not know who your UAA contacts are, you can:

- a) Go to RC Portal at <https://rc.caiso.com>, pull up the Contact list here, or:



- b) Contact the CAISO Service Desk at (888) 889-0450 or ServiceDesk@caiso.com and provide your organization's name and they can pull up the UAA information for you.

	Reliability Coordinator Procedure	Procedure No. RC0540A
		Version No. 1.3
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- c) Request for the UAA to provision their user(s) to the following role for access within 24-48 hrs.: **EXTERNAL IMS READ-WRITE** If you do not have access to the RC Portal, please work with your UAA to provision access to **RCSFE** in the Access Identify Management (AIM) tool.
- d) If the user has an existing CAISO CMA certificate, the CIDI application will be automatically added to the user's profile.
- e) If the user requires a new certificate, the user will receive an email notification with instructions on how to register and install their certificate.

Step 3: Submit request in WIT Schedule Change via CIDI Ticket

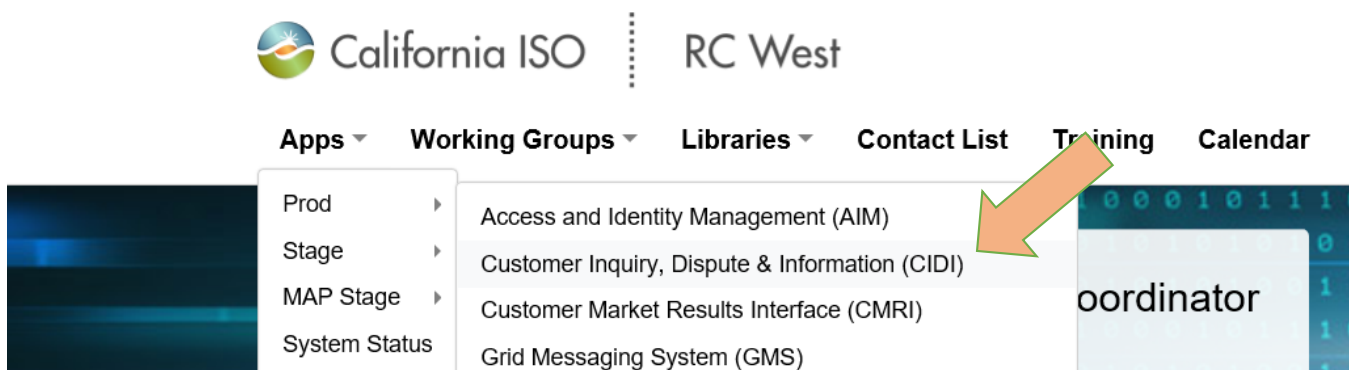
Before submitting a CIDI ticket for a WIT Schedule Change request, all signatures must be included and confirmed by the requesting BA in the **WIT Schedule Change Request Form**.


Follow the WECC Guideline: WECC Interchange Tool (WIT) Checkout Guidelines and the WECC ATF (After-the-Fact) Tagging Guideline to fill out the WIT Schedule Change Request Form.

Once the WIT Schedule Change Request Form is accurately completed and necessary signatures are included, please navigate to the RC Portal at <https://rc.aiso.com> and click on **Apps >> Prod >> CIDI**.

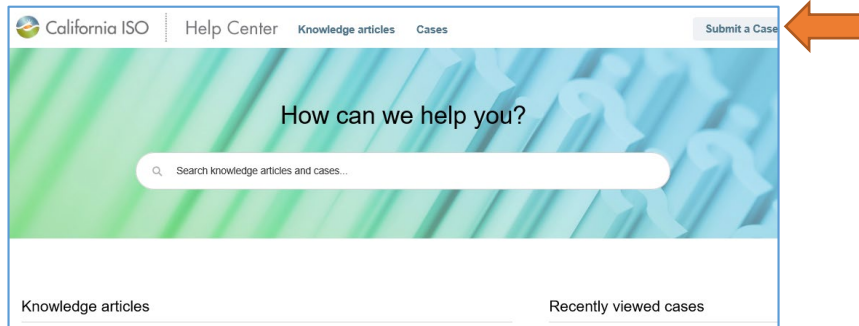
General instructions on how navigate through the application can found in the **CIDI User Guide**:

[customer-inquiry-dispute-and-information-cidi-user-guide.pdf](#)

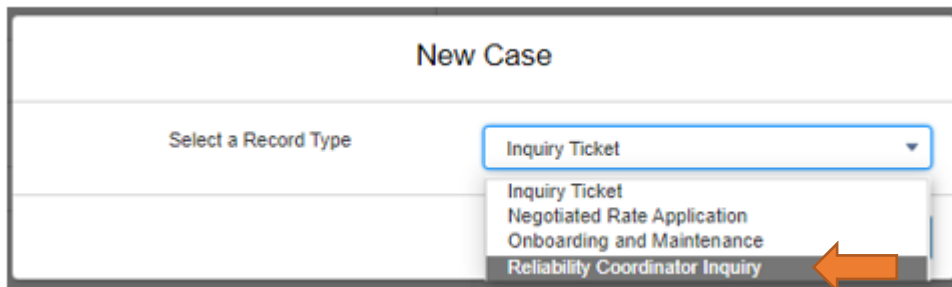



	Reliability Coordinator Procedure	Procedure No.	RC0540A
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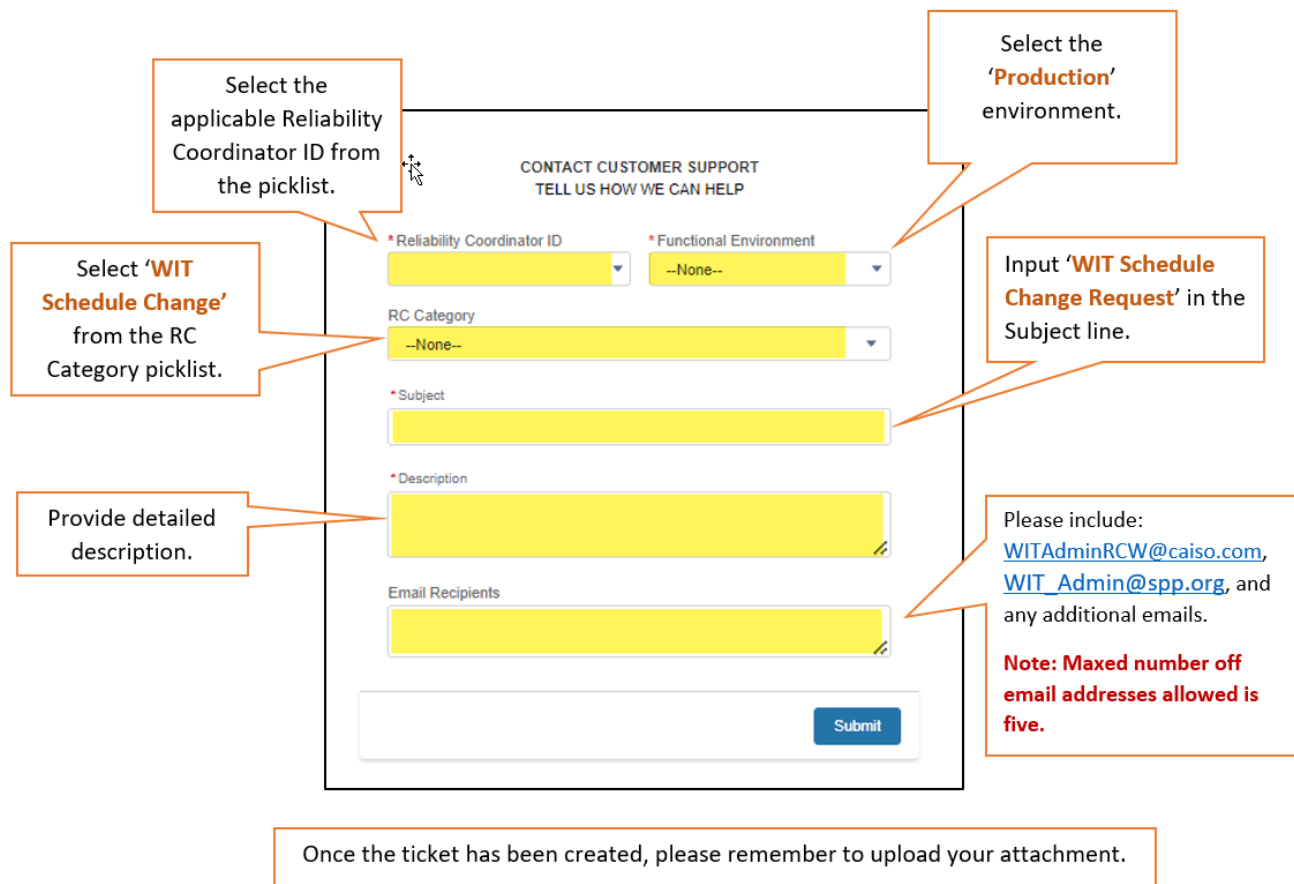
a) Log into CIDI and click on the **Submit a Case** button



b) Next, select the **Inquiry Ticket** record type.



	Reliability Coordinator Procedure	Procedure No.	RC0540A
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***Reliability Coordinator ID** (dropdown menu) — Select the applicable Reliability Coordinator ID from the picklist.

***Functional Environment** (dropdown menu) — Select the 'Production' environment.

RC Category (dropdown menu) — Select 'WIT Schedule Change' from the RC Category picklist.

***Subject** (text field) — Input 'WIT Schedule Change Request' in the Subject line.

***Description** (text area) — Provide detailed description.


Email Recipients (text area) — Please include: WITAdminRCW@caiso.com, WIT_Admin@spp.org, and any additional emails. **Note: Maxed number off email addresses allowed is five.**

Submit

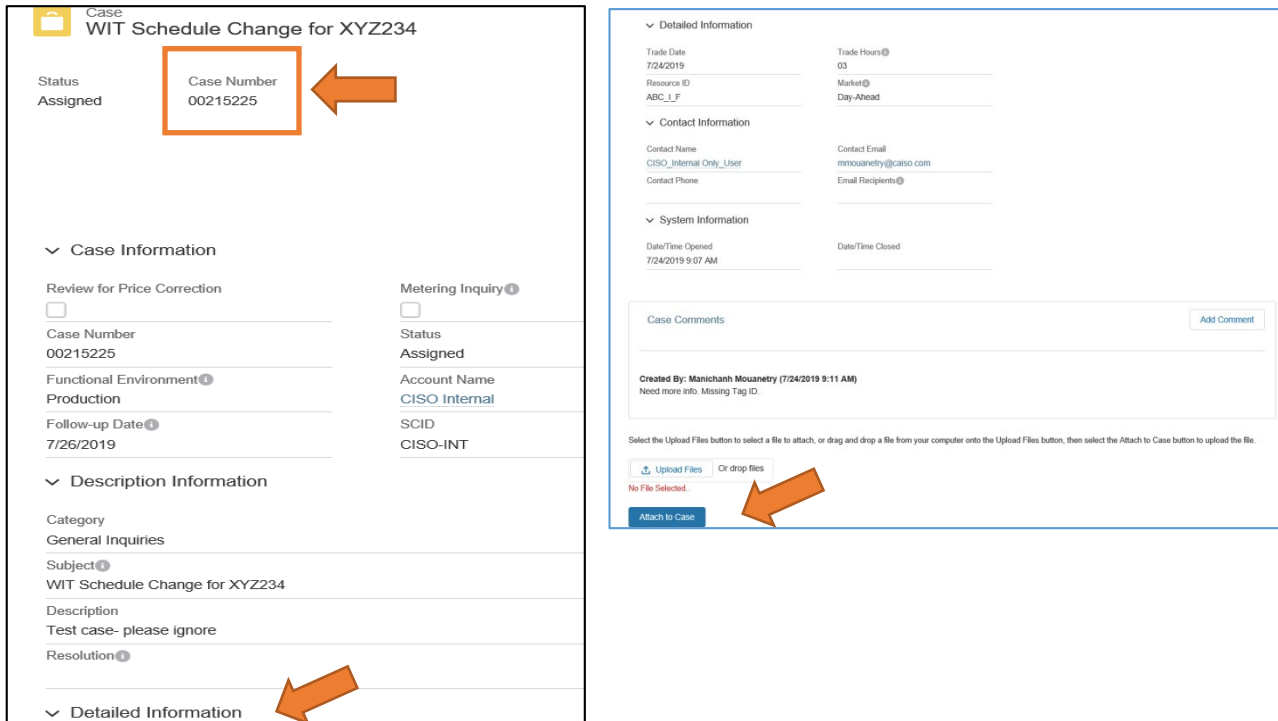
Once the ticket has been created, please remember to upload your attachment.

Please complete the required fields on the New Case: Inquiry Ticket window. Required fields are indicated by the asterik sign (*), in addition to the Email Recipients. Include everyone from the form in the Recipient field to receive emails regarding the status and description and resolution of the request. These recipients include:

- The RC West WIT administrators, WITAdminRCW@caiso.com
- The SPP WIT administrators, WIT_Admin@spp.org

	Reliability Coordinator Procedure	Procedure No.	RC0540A
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After all the required fields are updated, click **Next** to continue. This will generate a new Case Number request. You will need to attach/upload the WIT Schedule Change request template. A notification will be sent to the WIT Schedule Change team to review the new request.



The screenshot displays a web interface for a 'Case WIT Schedule Change for XYZ234'. The left sidebar contains sections for 'Case Information' and 'Description Information'. In the 'Case Information' section, the 'Case Number' field is highlighted with an orange box and an arrow pointing to it. The 'Detailed Information' section on the right shows various fields like 'Trade Date', 'Resource ID', and 'Contact Information'. At the bottom of the right pane, there is an 'Upload Files' button with an orange arrow pointing to it, and an 'Attach to Case' button below it.

Please attach the WIT Schedule Change Request form that includes all signatures. Ensure the WIT Schedule Change Request form includes the information below:

- Date
- HE
- Time Zone
- Tag Code
- Current MW Schedule
- Requested MW Schedule
- Reason

	Reliability Coordinator Procedure	Procedure No.	RC0540A
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Step 4: Submit request in WIT Schedule Change via email

Reliability Coordinators or participants who do not have access to the Customer Inquiry Dispute Information (CIDI) application should submit an email request to the CAISO Service Desk at ServiceDesk@caiso.com. The email must include these instructions below:

- Email subject line must contain these key words, 'WIT Schedule Change Request'.
- In the body of the email:
 - Add instructions to the Service Desk to update the ticket to include the verbiage, 'WIT Schedule Change Request' in the Subject line.
 - Provide a brief description of the changes.
 - Attach a copy of the WIT Schedule Change Request form with complete signatures. The form is linked in the Background section above.
 - Include everyone from the form in the Recipient field to receive emails regarding the resolution of the request. These recipients include:
 - The RC West WIT administrators, WITAdminRCW@caiso.com
 - The SPP WIT administrators, WIT_Admin@spp.org

Please contact ServiceDesk@caiso.com if there are any changes needed to follow up to this ticket.

Step 5: WIT Schedule Change is Completed

When the WIT Administrators have completed the change(s), an email will be sent confirming that the change has occurred to all the parties listed in the CIDI ticket.


Supporting Information

Operationally Affected Parties

Shared with the Public.

Version History

Version	Change	Date
1.0	Initial version. RCW BAs began using this process beginning 11/1/2019. Instructions were provided in Power Point form that was posted on the WECC website in the ISAS September meeting section.	12/20/19

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Version	Change	Date
1.1	Periodic Review: Updated procedure title for RC West and updated “Effective” date. Updated Inquiry Ticket type to Reliability Coordinator Inquiry and removed name specific detail to make the distribution more generic. Removed Appendix A diagram and included in main procedure RC0540. Minor format and grammar edits for consistency.	3/24/22
1.2	Removed the macro-enabled WIT Schedule Change Form link from Background Section. Corrected Step 2 title and slight rewording to Steps 3 and 4.	8/24/22
1.3	Periodic Review: Defined BAs and TSPs and updated the WIT Schedule Change Request Form link in Background section. Updated CIDI User Guide link under Step 3. Minor formatting and grammar edits.	5/01/25

Periodic Review Procedure

Review Criteria & Incorporation of Changes

There are no specific review criteria identified for this document.

Frequency

Review at least once every three years.