

Seasonal Ratings Autoloader Template Instructions

Background

In alignment with FERC Order No. 881, new Spring and Fall seasonal ratings are being introduced. These additional seasons will adhere to the same data requirements currently applied to the existing Summer and Winter ratings within the Transmission Registry (TR) application. Each Participating Transmission Owner (PTO) will define their seasonal timeframes using the webLineR application. As part of this update, existing month-based season definitions will be removed from the TR rating type descriptions.

The TR is being updated to include four new rating types. This covers both Spring and Fall and the necessary component-level data for each. All other aspects of the TR will remain unchanged. To streamline the approval process, an autoapprove feature is being implemented. This functionality will evaluate the new seasonal ratings against predefined qualifying criteria and automatically approve them where applicable. Specifically, Spring and Fall ratings must fall within the range defined by the corresponding Summer and Winter ratings.

The new seasonal ratings added to the TR include:

- Spring Normal, SPN (N)
- Spring Emergency, SPE (M)
- Fall Normal, FN (L)
- Fall Emergency, FE (O)

Each rating type will have four data columns, identical to the existing Summer and Winter seasons:

- High Rating
- Low Rating
- Duration
- Note #

The process to export the autoloader file, enter data, and upload the file remains the same. This tutorial will demonstrate how to add the new columns for the four new rating types to the autoloader template.

Autoloader template instructions

Step 1: Autoloader export

- Following existing process, export the “autoloader export” file for the components where you wish to add Spring and Fall ratings.
- A blank autoloader template file is provided for your convenience. You can copy and paste the data from the exported file into the template file, then populate the Spring and Fall ratings columns.
- If you use the blank autoloader template file provided, skip Steps 2 and 3 below and go to Step 4.

Step 2: Prepare Autoloader file for new data

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W			
1	Type of Change	Change Request Reason	OID	Org	Own	Stati	Com	Com	High	Low	F	Tertic	Length	ISO	C	Units	Additional	Line	Nur	Rating Typ	High Ratin	Low Ratin	Duration	Note #	Rating Typ	High Rati
2	Update	FERC-881							115	60	13.2	Y	MVA							SN (N)	76.2		0		SE (A)	91.5
3	Update	FERC-881							115			Y	AMPE954 MCM AL - INTERI	SN (N)						SN (N)	752		0		SE (A)	88
4	Update	FERC-881							115			Y	AMPE800/5A	SN (N)						SN (N)	800		0		SE (A)	800
5	Update	FERC-881							115			Y	AMPE500-37 MCM Copper	SN (N)						SN (N)	636		0		SE (A)	744
6	Update	FERC-881							60			Y	AMPS	SN (N)						SN (N)	636		0	26	SE (A)	744
7	Update	FERC-881							60			Y	AMPE500 MCM CU (kcmil)	SN (N)						SN (N)	636		0		SE (A)	744
8	Update	FERC-881							60			Y	AMPE2-1/2" IPS Sch 40 Alur	SN (N)						SN (N)	1590		0		SE (A)	196
9	Update	FERC-881							60			Y	AMPE2-1/2" IPS Sch 40 Alur	SN (N)						SN (N)	1590		0		SE (A)	196
10	Update	FERC-881							115			Y	AMPE2-1/2" AL SCH 40 - IN'	SN (N)						SN (N)	1590		0		SE (A)	196
11	Update	FERC-881							115			Y	AMPS	SN (N)						SN (N)	416		0	26	SE (A)	48
12	Update	FERC-881							115			Y	AMPE400/800 set at 800*1.	SN (N)						SN (N)	800		0		SE (A)	800
13	Update	FERC-881							115			Y	AMPE2000/5 set at 800*1.0	SN (N)						SN (N)	800		0		SE (A)	800
14	Update	FERC-881							115			Y	AMPE250-19 kcmil CU - IN'	SN (N)						SN (N)	416		0		SE (A)	48
15	Update	FERC-881							115			Y	AMPS	SN (N)						SN (N)	636		0	26	SE (A)	744
16	Update	FERC-881							115			Y	AMPE2000/5A set at 800*1	SN (N)						SN (N)	800		0		SE (A)	800
17	Update	FERC-881							115			Y	AMPS	SN (N)						SN (N)	1200		0		SE (A)	1200
18	Update	FERC-881							115			Y	AMPS	SN (N)						SN (N)	1200		0		SE (A)	1200
19	Update	FERC-881							115			Y	AMPS	SN (N)						SN (N)	1200		0		SE (A)	1200
20	Update	FERC-881							115			Y	AMPS	SN (N)						SN (N)	1200		0		SE (A)	1200

- In column A, enter “Update”
- In column B, enter “FERC-881”
- Select cells Q1 through U1(rating type column headings) and copy the contents

AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA	BB	BC	BD	BE
High Ratin	Low Ratin	Duration	Note #	Rating Typ	High Ratin	Low Ratin	Duration	Note #	Rating Typ	High Ratin	Low Ratin	Duration	Note #	Rating Typ	High Ratin	Low Ratin	Duration	Note #	Rating Typ	High Ratin	Low Ratin	Duration	Note #	
91.5		4																						
1249		4																						
800																								
1036		4																						
1036		4	26																					
2470		4																						
2470		4																						
2470		4																						
666		4	26																					
800		0																						
800		0																						

- Scroll the worksheet to the very last column of data to the right and paste the column headings in the first row four times. These 20 columns will be your new columns for the four new rating types and data.

Step 3: Enter new ratings data in the new columns

AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA	BB	BC	BD
Rating Type	High Rating	Low Rating	Duration	Note #	Rating Type	High Rating	Low Rating	Duration	Note #	Rating Type	High Rating	Low Rating	Duration	Note #	Rating Type	High Rating	Low Rating	Duration	Note #
SPN (N)	76.2		0		SPE (M)	91.5		4		FN (L)	76.2		0		FE (O)	91.5		4	
SPN (N)	752		0		SPE (M)	887		4		FN (L)	1167		0		FE (O)	1249		4	
SPN (N)	800		0		SPE (M)	800		0		FN (L)	800		0		FE (O)	800		0	
SPN (N)	636		0		SPE (M)	745		4		FN (L)	970		0		FE (O)	1036		4	
SPN (N)	636		0	26	SPE (M)	745		4	26	FN (L)	970		0	26	FE (O)	1036		4	26
SPN (N)	636		0		SPE (M)	745		4		FN (L)	970		0		FE (O)	1036		4	
SPN (N)	1590		0		SPE (M)	1960		4		FN (L)	2215		0		FE (O)	2470		4	
SPN (N)	1590		0		SPE (M)	1960		4		FN (L)	2215		0		FE (O)	2470		4	
SPN (N)	1590		0		SPE (M)	1960		4		FN (L)	2215		0		FE (O)	2470		4	
SPN (N)	416		0	26	SPE (M)	484		4	26	FN (L)	623		0	26	FE (O)	666		4	26
SPN (N)	800		0		SPE (M)	800		0		FN (L)	800		0		FE (O)	800		0	
SPN (N)	800		0		SPE (M)	800		0		FN (L)	800		0		FE (O)	800		0	
SPN (N)	416		0		SPE (M)	484		4		FN (L)	623		0		FE (O)	666		4	
SPN (N)	636		0	26	SPE (M)	745		4	26	FN (L)	800		0	26	FE (O)	800		0	23
SPN (N)	800		0		SPE (M)	800		0		FN (L)	800		0		FE (O)	800		0	
SPN (N)	1200		0		SPE (M)	1200		0		FN (L)	1200		0		FE (O)	1200		0	
SPN (N)	1200		0		SPE (M)	1200		0		FN (L)	1200		0		FE (O)	1200		0	
SPN (N)	1200		0		SPE (M)	1200		0		FN (L)	1200		0		FE (O)	1200		0	

- Use the following short names for the new season ratings. (Ensure proper spacing between parentheses. Do not enter the quotes "")
 - o Spring Normal = "SPN (N)"
 - o Spring Emergency = "SPE (M)"
 - o Fall Normal = "FN (L)"
 - o Fall Emergency = "FE (O)"
- Enter values for all other columns as needed, like Summer and Winter rating values, duration and notes codes

Step 4: Check, Save and Upload autoloader template file

- Double check the entered values and ensure the data within the columns are the correct data type.
- Ensure the new Spring and Fall ratings are equal to or between the Summer and Winter ratings
- Save the autoloader template file
- Ensure no other columns of data have changed. Data modified in other columns will not be saved in the TR. Only new data for the new seasons will be saved in the TR using the autoapprove functionality
- Data corrections or updates to Summer and Winter ratings must follow the normal update and manual approval process
- Upload the autoloader template file into the TR

AutoApprove functionality

The autoapprove functionality follows certain criteria to validate data being uploaded and approved fall within expected ranges and are appropriate data type. At a high level, all new season rating data and types should be like Summer and Winter data and types. The autoapprove functionality runs every 30 minutes to allow quick processing and notifications of the uploaded data. For each row or component where type of change is "Update" AND change reason is "FERC-881", the code processes the Spring Normal, Spring Emergency, Fall Normal and Fall Emergency ratings through the data validation steps. The code will "Approve" the row or component if all checks succeed. If validation checks don't succeed, the row is "Declined", and the code moves to the next row or component.

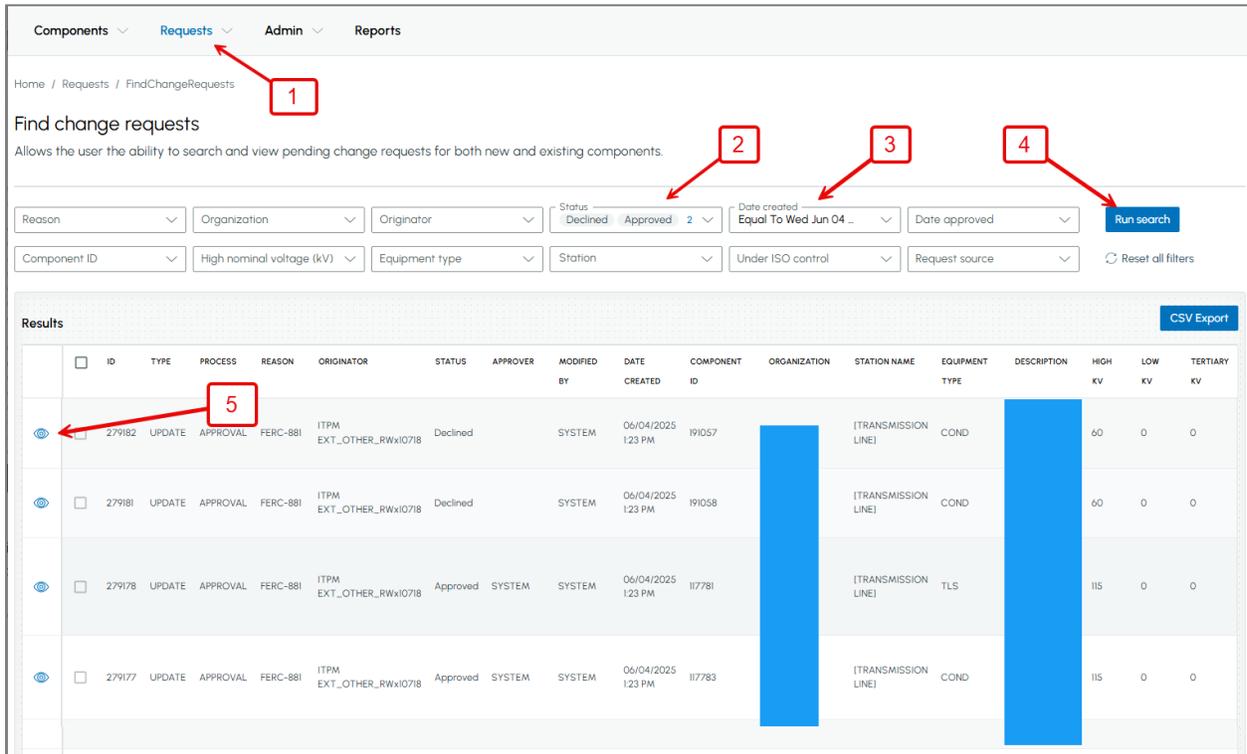
A user can have other change reasons, including "Create" for new components within the same autoloader file. These other request types will follow the normal manual approval process, which may take longer. ISO requests that all other change reasons be delayed until new seasonal ratings have been uploaded. If PTO needs priority processing of other change reasons, let Grid Assets team know via email which components need priority manual processing.

The autoapprove code performs the following data validation:

- Type of Change = "Update" AND Change Reason = "FERC-881"
- Spring Normal rating EQUAL TO OR BETWEEN Summer Normal AND Winter Normal ratings
- Spring Emergency rating EQUAL TO OR BETWEEN Summer Emergency AND Winter Emergency ratings
- Fall Normal rating EQUAL TO OR BETWEEN Summer Normal AND Winter Normal ratings
- Fall Emergency rating EQUAL TO OR BETWEEN Summer Emergency AND Winter Emergency ratings
- All new data is checked for appropriate data type and character count
- If all checks pass, row or component data update is "Approved" ELSE "Declined"

Check status of Uploaded autoloader file

After uploading the autoloader file, allow at least 30 minutes for the system to process the file. To check the status of your uploaded file, follow the steps below.



The screenshot shows the 'Find change requests' page in the California ISO system. The page includes a navigation menu at the top with 'Components', 'Requests', 'Admin', and 'Reports'. Below the navigation is a breadcrumb trail: 'Home / Requests / FindChangeRequests'. The main heading is 'Find change requests' with a sub-description: 'Allows the user the ability to search and view pending change requests for both new and existing components.' Below this is a search filter section with various dropdown menus: Reason, Organization, Originator, Status (set to 'Declined', 'Approved', and '2'), Date created (set to 'Equal To Wed Jun 04 ...'), Date approved, Component ID, High nominal voltage (kV), Equipment type, Station, Under ISO control, and Request source. A 'Run search' button is on the right, and a 'Reset all filters' link is at the bottom right of the filter section. Below the filters is a 'Results' section with a 'CSV Export' button. The results table has columns: ID, TYPE, PROCESS, REASON, ORIGINATOR, STATUS, APPROVER, MODIFIED BY, DATE CREATED, COMPONENT ID, ORGANIZATION, STATION NAME, EQUIPMENT TYPE, DESCRIPTION, HIGH KV, LOW KV, and TERTIARY KV. Five red callout boxes with numbers 1 through 5 point to specific elements: 1 points to the 'Requests' menu item, 2 points to the 'Status' dropdown, 3 points to the 'Date created' dropdown, 4 points to the 'Run search' button, and 5 points to the first row of the results table.

ID	TYPE	PROCESS	REASON	ORIGINATOR	STATUS	APPROVER	MODIFIED BY	DATE CREATED	COMPONENT ID	ORGANIZATION	STATION NAME	EQUIPMENT TYPE	DESCRIPTION	HIGH KV	LOW KV	TERTIARY KV
279182	UPDATE	APPROVAL	FERC-881	ITPM EXT_OTHER_RWx10718	Declined	SYSTEM	SYSTEM	06/04/2025 123 PM	191057		[TRANSMISSION LINE]	COND		60	0	0
279181	UPDATE	APPROVAL	FERC-881	ITPM EXT_OTHER_RWx10718	Declined	SYSTEM	SYSTEM	06/04/2025 123 PM	191058		[TRANSMISSION LINE]	COND		60	0	0
279178	UPDATE	APPROVAL	FERC-881	ITPM EXT_OTHER_RWx10718	Approved	SYSTEM	SYSTEM	06/04/2025 123 PM	117781		[TRANSMISSION LINE]	TLS		115	0	0
279177	UPDATE	APPROVAL	FERC-881	ITPM EXT_OTHER_RWx10718	Approved	SYSTEM	SYSTEM	06/04/2025 123 PM	117783		[TRANSMISSION LINE]	COND		115	0	0

Step 1: Check status of upload components

- Click "Request", then "Find Change Requests"
- In the "Status" box, select "Approved" and "Declined". Enter other criteria as needed
- In the "Date created" box, select the date when data was uploaded
- Click "Run Search"
- To view details of a "Declined" request, click the "View Details" eyeball

Change request: 279188 **DECLINED** Originator: ITPM_EXT_OTHER_RWx10718 Last modified by: SYSTEM on 06/04/2025 1:23 PM

Change type	Request reason	Process type	Process effective date
Modify	FERC-881	Upon Approval	

Approver: Approver notes
Auto Rejected for FERC-881 change request reason : One or more of the ratings are outside of the expected limit ← 5

Component ID: [190980](#)

Current		Proposed																																																											
About		About																																																											
Description	[REDACTED]	Description	[REDACTED]																																																										
Organization	[REDACTED]	Organization	[REDACTED]																																																										
Owners	[REDACTED]	Owners	[REDACTED]																																																										
Last Modified Date	5/28/2025	Last Modified Date	6/4/2025																																																										
Equipment		Equipment																																																											
Station	[TRANSMISSION LINE]	Station	[TRANSMISSION LINE]																																																										
Equipment type	COND	Equipment type	COND																																																										
Additional info	CONDUCTOR INFO: 715.5 KCMIL AAC - SINGLE - INTERIOR RATING	Additional info	CONDUCTOR INFO: 715.5 KCMIL AAC - SINGLE - INTERIOR RATING																																																										
Length(Miles)	0.08	Length(Miles)	0.08																																																										
Voltage		Voltage																																																											
High nominal voltage (kV)	115.0	High nominal voltage (kV)	115.0																																																										
Low nominal voltage (kV)		Low nominal voltage (kV)																																																											
Tertiary nominal voltage (kV)		Tertiary nominal voltage (kV)																																																											
Control		Control																																																											
ISO control	Yes	ISO control	Yes																																																										
ISO control start date	6/27/2023	ISO control start date	6/27/2023																																																										
ISO control end date		ISO control end date																																																											
Ratings		Ratings																																																											
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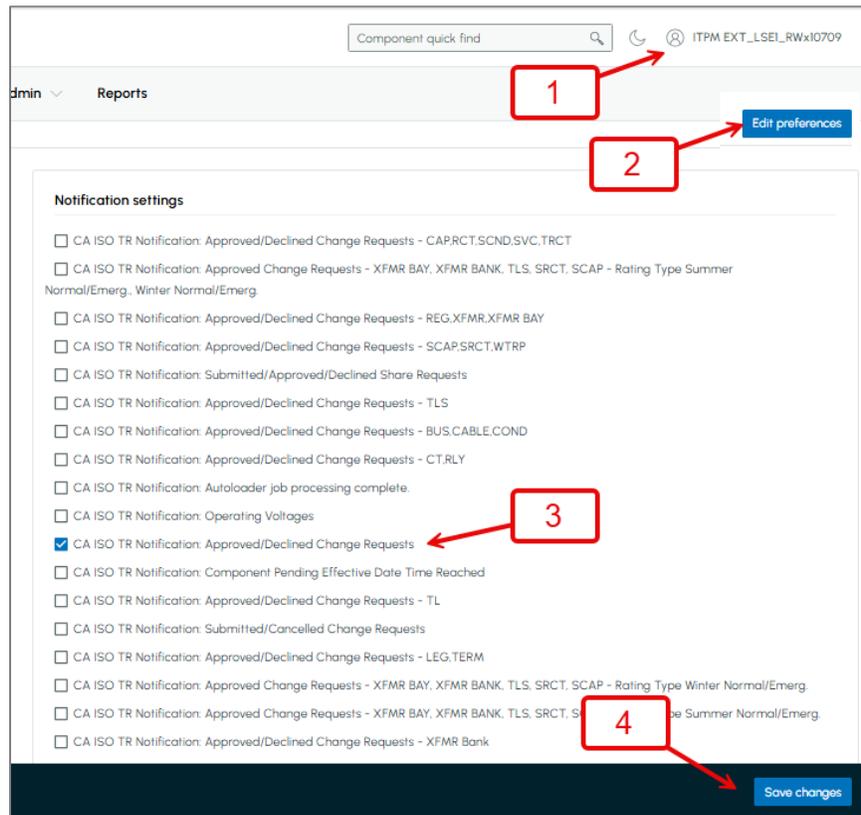
← 6

Step 2: Compare changed data

- Check “Approver Notes” section for reason why the system declined the change request. A change reason of “Auto Rejected for FERC-881 change request reason: One of more of the ratings are outside of the expected limit” indicates that one or more of the Spring or Fall ratings do not meet the validation criteria for auto approval.
- Check the values for Spring and Fall, correct any values that are outside the validation criteria and re-submit the corrected components. See **Autoapprove functionality** section above for the validation criteria.

Approved/Declined ratings message and notification

A user can choose to receive a notification email for Approved or Declined ratings. Follow the steps below prior to uploading your autoloader file if you wish to receive such notifications



The screenshot shows the 'Notification settings' section of a user's preferences. The interface includes a search bar at the top, a user profile icon labeled 'ITPM EXT_LSEL_RW:10709', and a navigation menu with 'Reports' selected. A list of notification options is displayed, each with a checkbox. The option 'CA ISO TR Notification: Approved/Declined Change Requests' is checked. A 'Save changes' button is located at the bottom right.

Step 1: Edit user preferences

- Click on User icon on top right corner of window
- Click “Edit preferences” box
- Check the box for “CA ISO TR Notification Approved/Declined Change Requests”
- Click “Save Changes” on bottom right of window

Support

If you encounter any issues when uploading the autoloader file, or have any questions, feel free to email Parikshat Pathak (ppathak@caiso.com) and Adalberto Baca-Chavez (abacachavez@caiso.com). In the email, please include as much detail as possible to ensure quick resolution.