



Energy Storage and Distributed Energy Resources Phase 2

Customer Partnership Group

July 2, 2018

11 a.m.– 12 p.m. (Pacific Standard Time)

Agenda

Item

Project Schedule Update

Market Simulation

External Training

Performance Evaluation Methodology

Control Group

Questions Received and ISO Answers

Next Steps

Fall 2018 – ESDER Phase 2 - Project Schedule

Milestone Type	Milestone Name	Dates	Status
Board Approval	Obtain Board of Governors Approval	Jul 26, 2017	✓
External BRS	Post External BRS	Oct 17, 2017	✓
	Post Revised External BRS	Mar 01, 2018	✓
Tariff	Post Draft Tariff	Nov 17, 2017	✓
	Post Updated Draft Tariff (based on feedback)	Apr 09, 2018	✓
	File Tariff with FERC	Aug 01, 2018	
Config Guides	Settlements Config Guides	May 18, 2018	✓
BPMs	Post Draft BPM changes	Aug 06, 2018	
Tech Spec	Publish ISO Interface Spec (Tech spec)	May 21, 2018	✓
External Training	Deliver external training	Aug 07, 2018	
Market Sim	Market Sim Window	Aug 20, 2018 - Sep 28, 2018	
Production Activation	ESDER Phase 2	Nov 01, 2018	

Market Simulation Preparation

- Structured Scenarios

- <http://www.caiso.com/Documents/StructuredScenarios-EnergyStorageandDistributedEnergyResourcesPhase2.pdf>

- Performance Evaluation Methodology Elections

- http://www.caiso.com/informed/Pages/StakeholderProcesses/EnergyStorage_DistributedEnergyResources.aspx
 - Energy Storage and distributed energy resources phase 2 implementation customer partnership group
 - Performance Evaluation Methodology Request Forms
- Submit to PDR@caiso.com

- Application Access

- DRRS
- MRIS

SubLAP & DLAP for Registrations with Control Group Baseline Method

- When creating a registration with Control Group as the baseline method, SubLAP is optional for the registration as the control group locations can be in multiple SubLAPs.
- An XSD change is being made to the DRRSRegistrationData XSD to make the SubLAP element optional at the registration level. It is currently mandatory.
- Since SubLAP is required to derive the DLAP and since registration with Control Group baseline would not have a SubLAP specified, it is not possible to derive the DLAP for such registrations. The DRP is **required** to submit the DLAP for such registrations.

External Training Overview

- Training Date: August 7, 2018
- Process Changes
 - New Baseline Approval Process and Timeline
 - SCs/DRPs Calculate Baselines & Performance (DREM)
 - Ancillary Service and Demand Response
- Application Changes
 - Decommissioning DRS, Parallel Operations, Transition Timeframe
 - Changes to DRRS, Selecting New Baselines
 - Submitting Baseline and DREM into MRIS
- Settlements Changes
 - Charge Code Configuration Changes
 - Net Benefits Test
- Business Process Manuals
 - Affected Business Process Manuals

Questions Received

Q: What determines the locations/sites that can be included in the same Control Group? For example, are they considered the same group based on their energy usage, similar or adjusted for climate area, similar on basis of magnitude or how they respond to that climate? Or are they simply based on meter type, i.e. residential meters, single family residential meters, etc.

A: Please refer to this document for a more comprehensive explanation for each of the Performance Evaluation Methodologies.

<http://www.caiso.com/Documents/2017BaselineAccuracyWorkGroupProposal-Nexant.pdf>

Q: What are the end-user permission requirements for the Control Group

A: CAISO's only requirement is that the DRP utilize customers that have been registered in the DRRS. Meaning the DRP has obtained authorization to utilize the customer in their DR programs. Therefore, the end-user cannot be registered by another DRP.

Questions Received

Q: Would these utility customers be required to sign a CISR Form or follow the Click Through Process?

A: Yes

Q: For Municipal utilities, as well as, IOU's?

A: They would need to obtain approval from the LSE/UDC that they are recognized as being assigned to that DRP for their effective date registered in the DRRS. The process to gain that approval is not defined by the ISO. The CAISO's understanding is that this may currently be undefined for CCAs.

Q: If a DRP has customer consumption data already through it's own equipment, will additional permission be necessary to become part of a control group?

A: Yes, the registration process requires identification of the customers Service Account Number (SAN) and LSE/UDC for that SAN. The LSE/UDC has review rights during that process to ensure the DRP has completed their processes to utilize the SAN in the PDR/RDRR



Questions?

Next Steps

- Please submit further questions or comments to:

Elaine Siegel at esiegel@caiso.com

or

initiativecomments@caiso.com

- Customer Partnership Groups webpage available at:
<http://www.caiso.com/informed/Pages/MeetingsEvents/CustomerPartnershipGroups/Default.aspx>