Transmission Service and Market Scheduling Priorities Phase 2 Track 1: Implementation Updates

Stakeholder call

January 9, 2024

Housekeeping reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.

- These collaborative working groups are intended to stimulate open dialogue and engage different perspectives.

- Please keep comments professional and respectful.

California ISO

Instructions for raising your hand to ask a question

- If you are connected to audio through your computer or used the "call me" option, select the raise hand icon located on the bottom of your screen.
  Note: #2 only works if you dialed into the meeting.
  - Please remember to state your name and affiliation before making your comment.

- You may also send your question via chat to Brenda Corona or to all panelists.

Agenda

Time	Topic	Presenter
9:00 – 9:05	Welcome & introductions	Brenda Corona
9:05 – 9:15	Background & implementation timeline overview	Milos Bosanac
9:15 – 10:00	Manual implementation activities	Abdul Mohammed-Ali
10:00 – 10:45	Automation supporting implementation plan and timeline	Robyn Ready
10:45 – 11:00	Next steps	Milos Bosanac

California ISO

New process for establishing wheeling through priority starting for June 2024 and beyond

- On October 30th, 2023, FERC approved a new process for establishing market clearing priority for wheeling through transactions.
  - Effective June 1, 2024.

- Under the new process, Available Transfer Capability (ATC) is secured in advance on the ISO interties to establish wheeling through priority equal to ISO load.
  - ATC can be reserved in Monthly increments (13-month horizon) or Daily increments (7-day horizon).

- Wheeling through transactions without secured ATC in advance will have a lower market clearing priority.

California ISO

Implementation plan and timelines overview

- Implementation of wheeling through priority process supports load service planning for Summer 2024.

- ISO will begin implementation through <u>manual</u> processes starting mid-January.
  - Publication of Monthly ATC values for June 2024 and beyond, and opening reservation window in January.

- New automation functionality will be available in April to support further reservation of Monthly and Daily ATC in June and beyond.

California ISO

Interim wheeling through priorities framework remains in effect through May 31st, 2024

- The "interim" process for establishing wheeling through priority can continue to be utilized when seeking to establish priority for periods ahead of May 31st.
  - Demonstration of the following requirements at least 45-days in advance of a month:
    - Firm power supply contract
    - Firm transmission deliverability to the ISO system

- New framework for establishing wheeling through priority based on ATC reservation in advance is effective on June 1st, 2024.

California ISO

January 2024 manual implementation activities

The ISO will manually calculate and post <u>Monthly</u> ATC values across a 13-month horizon

- The ISO is in the process of calculating Monthly ATC values for June 2024 to January 2025 (13-month horizon).

- To facilitate the manual calculation of ATC, the ISO has requested historical non-RA contracted import data from ISO load serving entities.
  - Data submitted by January 8th

- The ATC values for select interties will be posted by January 17th.
  - On the <u>reliability requirements webpage</u>.

California ISO

Manual ATC calculation on interties previously supporting requests for wheeling through priority

- During the period that the manual process is in effect, the ISO will calculate ATC on select interties:

  - *CFEROA* – La Rosita Tie
  - *CFETIJ* – Tijuana Tie
  - *CTW230* – Cottonwood 230
  - *MALIN500* – Malin 500kV
  - *MIR2* – Mirage/Coachella 230
  - *NOB* – Nevada/Oregon Border
  - *SYLMAR* – Sylmar AC
  - *TESLA230* – Tracey/Tesla 1 and 2
  - *TRCYCOTP* – Tracy 500 intertie with BANC
  - *TRCYPGAE* – Tracy 500 intertie with BANC

Request window opens on January 18 to support requests for Monthly wheeling through priority

- The ISO will open the request window consistent with section 23 of the tariff to support submission of requests for Monthly ATC.

- Request window opens **January 18th** through **January 31st**, 2024.

- Requests for Monthly ATC cover the following period:
  – June 2024 through January 2025

- Results will be communicated to scheduling coordinators submitting requests within three (3) business days of window closing.

California ISO

Requests for Monthly ATC will be submitted via the CIDI tool

- Requests for ATC will be submitted during the reservation window through the CIDI functionality with the following requested information:

    - MW quantity of the request
    - Intertie point of receipt and export point of delivery
    - Duration (start and stop date) in months
    - Underlying duration/hours of the supply contract supporting the request
    - Whether willing to accept partial service
    - Attestation to the accuracy of information submitted

- The ISO will post a template for submission of the information on the Reliability Requirements page ahead of the request window.

Requests will be manually processed until automated functionality becomes available in April 2024

- The ISO will manually process requests for Monthly ATC during several months leading up to availability of automation.

- Request windows open for the upcoming months:
  - January: 1/18 – 1/31
  - February: 2/18 – 3/2
  - March: 3/19 – 4/1

- The ISO will manually process requests for Monthly ATC, competing requests based on underlying duration of supply contract, consistent with section 23 of the tariff.

California ISO

BPM updates to reflect the manual process implementation

- The ISO will publish a revised draft version of the *Market Operations BPM* which will capture:
  - Description of processes associated with ATC calculation and submission of information
  - Submission process for requests for Monthly ATC during the request windows

- The BPM will be further revised and updated once the automated functionality becomes available to describe the associated processes.
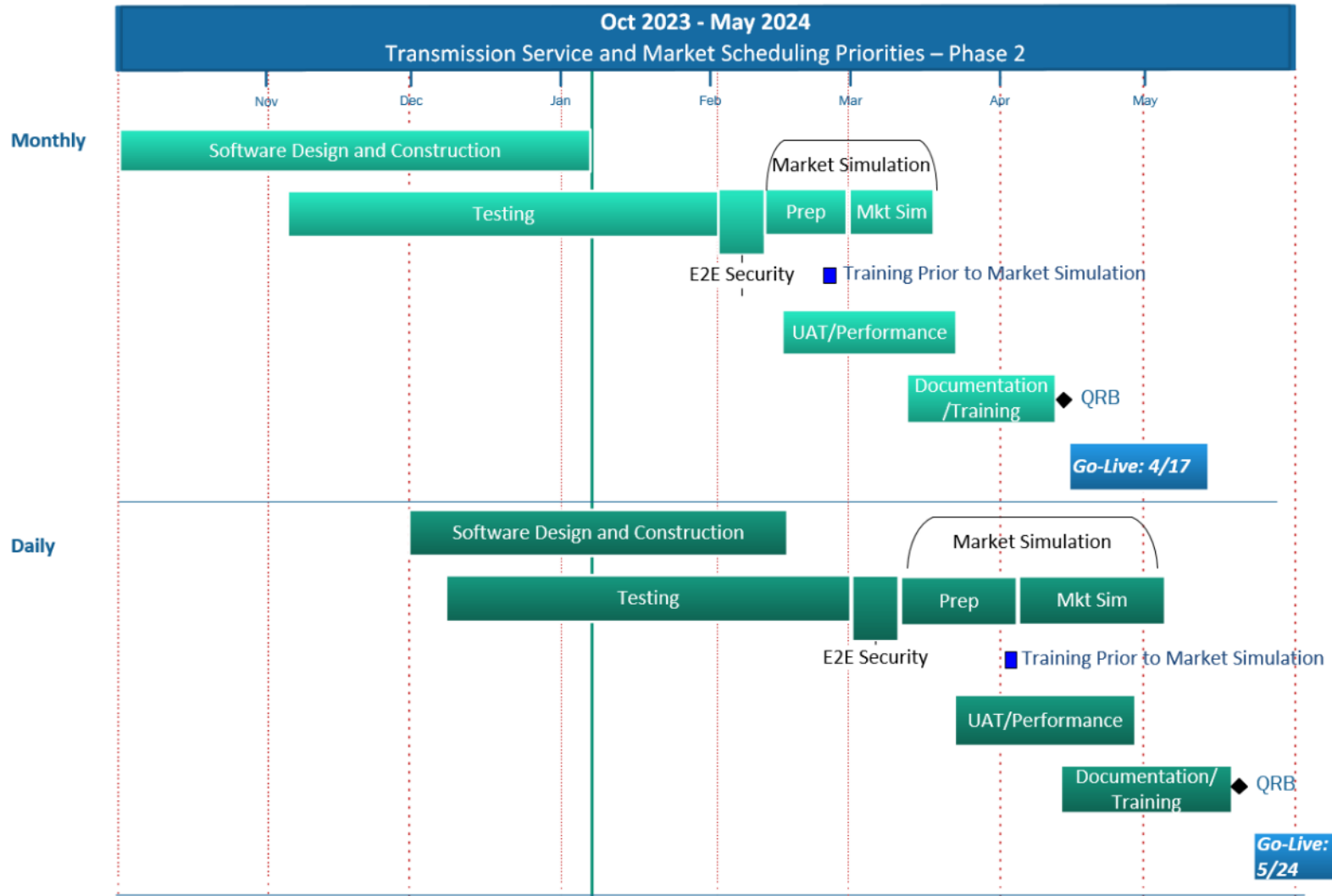
California ISO

Automated functionality implementation timeline

Implementation timeline

Transmission Service and Market Scheduling Priorities - Phase 2

Implementation: important dates

Item	Date
Monthly:	
Market Simulation prep	
Training prior to Market Sim	Week of February 26th
Market Simulation	March 1st to March 21st
Go-Live	April 17th
Daily:	
Market Simulation prep	
Training prior to Market Sim	Week of April 1st
Market Simulation	April 9th to May 7th
Go-Live	May 24th (earliest date)

California ISO

Next Steps

- Monthly ATC values for June 2024 to January 2025 posted by January 17th.

- The ISO will host a stakeholder meeting to review the ATC values on January 17th.

- January request window for Monthly ATC opens January 18 through January 31.

- The ISO will post the Market Operations BPM, ATC ID, and TRM ID document updates by January 17th.

California ISO