



California ISO

# Market Simulation 2024

Anshuman Vaidya

Mar 11, 2024

# Recordings

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# Agenda

- Market Simulation Initiatives & Timelines
- Initiatives
  - WEIM resource sufficiency evaluation redesign phase 2
  - Transmission service & market scheduling priorities phase 2 - Monthly
  - Transmission exchange agreement
  - Transmission service & market scheduling priorities phase 2 - Daily
  - ASSOC Flag enhanced Logic – Settlements Release
  - Highest Emergency Rating
- MAP Stage Availability
- Next Steps

# Market Simulation Initiatives & Timelines

<u>Independent 2024 Initiatives</u>	<u>Start Date</u>	<u>Start Date (Trade Date)</u>	<u>End Date</u>	<u>Structured Simulation Start (Trade Date)</u>
WEIM resource sufficiency evaluation redesign phase 2	TBD	TBD	TBD	TBD
Transmission service & market scheduling priorities phase 2- <i>Monthly</i>	03/04	03/05	03/22	03/05, 03/07
Transmission exchange agreement	04/08	04/08	05/17	N/A
Transmission service & market scheduling priorities phase 2 - <i>Daily</i>	04/08	04/09	05/03	04/09 , 04/11
ASSOC Flag enhanced Logic – Settlements Release	04/08	N/A	N/A	N/A
Highest Emergency Rating	TBD	TBD	TBD	TBD

# WEIM Resource Sufficiency Evaluation Redesign Phase 2

- **Timeline:** TBD
- **Structured:** TBD
- **Testing hours:** 3PM - 5PM
- **Implementation workshop:** 03/11
- **Pre Market Sim Refresher Training:** 03/14

Structured Scenarios document -

<https://www.caiso.com/Documents/MarketSimulationStructuredScenarios-ResourceSufficiencyEvaluationEnhancements-Phase2Track2.pdf>

# Transmission service & market scheduling priorities phase 2 - Monthly

- **Timeline:** 03/04 - 03/22
- **Scenario:** 03/05, 03/07
- **Access:**
  - Please work with your UAA to provision access to webWheel™

Scenario document –

[https://www.caiso.com/Documents/MarketSimulationStructure\\_dScenarios-Transmissionserviceandmarketschedulingpriorities-phase2.pdf](https://www.caiso.com/Documents/MarketSimulationStructure_dScenarios-Transmissionserviceandmarketschedulingpriorities-phase2.pdf)

# Transmission exchange agreement

- **Timeline: 04/08 – 05/17**
- UI: The current CMRI CRN report is not being changed.
- API: System external CRN Report API shall include the added “CRN Amount” data element to its payload. Add new CRN Amount data element (MW entitlements).
  - RetrieveContractUsage\_CMRIv2
  - RetrieveContractUsage\_CMRIv2\_DocAttach

# Transmission service & market scheduling priorities phase 2 - Daily

- **Timeline:** 04/08 - 05/03
- **Scenario:** Trade date 04/09 , 04/11

Scenario document – *updated scenario document will be available this week (by 03/18).*



# ASSOC Flag enhanced Logic – Settlements Release

- Timeline : 04/08
- Presented in SUG Jan 17, Jan 31, Feb 14, 2024
- Upstream systems are making an enhancement to indicate when the (potentially uneconomical) energy schedule of the storage resource in the financially-binding interval might be driven (in part) by binding AS SOC constraints in any advisory interval due to AS obligations. This information is communicated to Settlements for BCR Shortfall evaluation.
- Upstream systems will validate AS Awards driving AS SOC binding condition. Settlement configuration will no longer check whether AS Awards are present in the same interval as AS SOC flags in RTM\_NET\_AMT\_PC so ResourceASSOCConASRevenueAmount rmdhcif will be removed.
- Allow for corrections of AS SOC flags from 1 to 0, or 0 to 1.
- Retro-active corrections from TD 07/01/2023 onwards will require corrected AS SOC flags and Settlement to re-process them
- The “Market Operations” BPM has been updated to reflect this change. Please refer to PRR 1547. Comment period ended 2/13/24 11:59 PM & BPM meeting TODAY, 2/20/24 11AM PT

# Highest Emergency Rating

- **Timeline: TBD**

# CIDI tickets

CIDI's	
TSMSP Phase 2 - PWT for ATC Request Report in Map Stage OASIS (TD - 03/04)	Pending
CAISO TSMSP2 MAP Stage Market Simulation - [Resource ID Registration Missing]	Pending
AS SOC Retroactive Settlement	Pending
Unable to specify ISO environment when provision access to web wheel	Resolved
Transmission Services and Market Scheduling Priorities Phase 2 Track 2 - Questions	Resolved

# Market Simulation MAP Stage Availability

MAP Stage weekly maintenance window is Friday\* (Planned Outage 03/10 - 03/15)

System	UI	API	Comments
ADS			
ALFS	NA		
BAAOP			
BSAP			
CIRA			
CMRI			
CRR		NA	
DRRS			
MF			
OASIS			
OMS			
RCBSAP			
RIMS		NA	
SIBR			
MRIS			

AVAILABLE

MAINTENANCE

\*Maintenance may also occur after 1600 PT on other days and may deviate from the weekly maintenance window as necessary

# Next Steps

- The next teleconference is schedule for 03/14 at 2 PM.

# References

# Market Simulation Communication Plan

- **Schedule**

<b><i>Monday</i></b>	<b><i>Thursday</i></b>
Feb 26 March 4, 11, 18, 25	Feb 22, 29 March 7, 14, 21, 28

- **Connection Information**

- **Web Conference Information**

- Web Address: <https://caiso.webex.com/meet/MarketSim>
- Meeting Number: 962 067 710
- Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter the phone number you will use during the call. You will be called by the conference shortly.

- **Conference Call Information**

- Dial-in Number:
  - 1-844-517-1271 (Toll Free)
  - 1-682-268-6591
- Access Code: 962 067 710

# Market Simulation Issue Management

- Submit all issues to the CIDI case management system
- CIDI tickets must have “**Functional Environment**” = “**Market Simulation**” to be reviewed by ISO SMEs



# ISO Market Simulation Support

- **Hours:** Monday thru Friday 0900-1800 PDT
- **ISO's 24x7 Service Desk:** (916) 351-2309 (Connectivity – UI or API)
- **Email:** [MarketSim@caiso.com](mailto:MarketSim@caiso.com)

# Transmission service & market scheduling priorities phase 1

Scenario Number	Unstructured scenario	
1	Description	Facilitate submission and retrieval of PWT requests and awards.
	ISO Actions	<ol style="list-style-type: none"> <li>1. Define submission windows for monthly PWT requests.</li> <li>2. Verify PWT requests and prepare PWT awards.</li> <li>3. ISO will publish market sim wheeling through priority request due date.</li> </ol>
	WEIM Market Participant Actions	<ol style="list-style-type: none"> <li>1. Provision certificate access for the new role applicable for webWheel™.</li> <li>2. Register PWT resource id's in CAISO master file.</li> <li>3. Verify scheduling coordinators have access to PWTA rule.</li> <li>4. Register contract related information in PWTA.</li> <li>5. Submit PWT requests and verify received awards for monthly process.</li> <li>6. Review PWT ATC awards for monthly process.</li> </ol>
	ISO Market Participant Actions	<ol style="list-style-type: none"> <li>1. Provision certificate access for the new role applicable for webWheel™.</li> <li>2. Register PWT resource id's in CAISO master file.</li> <li>3. Verify scheduling coordinators have access to PWTA rule.</li> <li>4. Register contract related information in PWTA.</li> <li>5. Submit PWT requests and verify received awards for monthly process.</li> <li>6. Review PWT ATC awards for monthly process.</li> <li>7. Submit non RA contracts in CIRA 'Historic and new' for LSE's.</li> </ol>
	Expected Outcome	Participants to verify: <ol style="list-style-type: none"> <li>1) Contract information in PWTA .</li> <li>2) PWT request submission.</li> <li>3) PWT awards review.</li> <li>4) Review non RA contracts in CIRA: Plan--&gt; NLN Submission .</li> <li>5) Review results in OASIS.</li> </ol>
	Anticipated Settlement Outcome	N/A

# WEIM Resource Sufficiency Evaluation Redesign

## Phase2

Scenario Number	Unstructured scenario (RSEE2 Track -2)	
1	Description	Facilitate submission for <b>Auto Approval</b> of Export e-Tags with Product Code and CAISO_PRIORITY_TYPE.
	ISO Actions	N/A
	WEIM Market Participant Actions	<p>a) <b>After the DA or HASP market results are published</b>, Market Participants should e-tag several export resources as “Firm Provisional Energy (G-FP)” (via the Market Path product field) and mark “CAISO_PRIORITY_TYPE” in “Misc Info” as RTECON, RTLPT or DALPT</p> <p>b) <b>Before or after the DA or HASP market results are published</b> Market Participants should e-tag several export resources as product type other than G-FP (via Market Path product field) and mark “CAISO_PRIORITY_TYPE” in “Misc Info” as DAPT or RTPT</p>
	ISO Market Participant Actions	<p>a) <b>After the DA or HASP market results are published</b>, Market Participants should e-tag several export resources as “Firm Provisional Energy (G-FP)” (via the Market Path product field) and mark “CAISO_PRIORITY_TYPE” in “Misc Info” as RTECON, RTLPT or DALPT</p> <p>b) <b>Before or after the DA or HASP market results are published</b> Market Participants should e-tag several export resources as product type other than G-FP (via Market Path product field) and mark “CAISO_PRIORITY_TYPE” in “Misc Info” as DAPT or RTPT</p>
	Expected Outcome	Market Participants verify CISO approval of G-FP and other export resources e-tags in their own Web Smart Tag system. CAISO Operators will verify ITS for G-FP e-tags.
	Anticipated Settlement Outcome	N/A
	Expected Settlement Outcome	N/A

# WEIM Resource Sufficiency Evaluation Redesign

## Phase 2

Scenario Number	Unstructured scenario (RSEE2 Track -2)	
2	Description	Facilitate submission for <b>Auto Denial</b> of Export E-Tags without final market priority from DA or HASP market runs or with incorrect Product Code and CAISO_PRIORITY_TYPE.
	ISO Actions	N/A
	WEIM Market Participant Actions	<ul style="list-style-type: none"> <li>a) <b>(new scenario) Before the DA or HASP market results are published,</b> Market Participants should e-tag several export resources as "Firm Provisional Energy (G-FP)" (via the Market Path product field) and mark "CAISO_PRIORITY_TYPE" in "Misc Info" as RTECON, RTLPT or DALPT</li> <li>b) <b>After DA or HASP market publishes</b> Market Participants should e-tag several export resources as "Firm Provisional Energy (G-FP)" (via the Market Path product field) and mark "CAISO_PRIORITY_TYPE" in "Misc Info" as DAPT, RTPT</li> <li>c) <b>Before or after the DA or HASP market results are published</b> Market Participants should e-tag several export resources as product type other than G-FP (via Market Path product field) and mark "CAISO_PRIORITY_TYPE" in "Misc Info" as DALPT, RTLPT or RTECON</li> </ul>
	ISO Market Participant Actions	<ul style="list-style-type: none"> <li>a) <b>N(new scenario) Before the DA or HASP market results are published,</b> Market Participants should e-tag several export resources as "Firm Provisional Energy (G-FP)" (via the Market Path product field) and mark "CAISO_PRIORITY_TYPE" in "Misc Info" as RTECON, RTLPT or DALPT</li> <li>b) <b>After DA or HASP market publishes</b> Market Participants should e-tag several export resources as "Firm Provisional Energy (G-FP)" (via the Market Path product field) and mark "CAISO_PRIORITY_TYPE" in "Misc Info" as DAPT, RTPT</li> <li>c) <b>Before or after the DA or HASP market results are published</b> Market Participants should e-tag several export resources as product type other than G-FP (via Market Path product field) and mark "CAISO_PRIORITY_TYPE" in "Misc Info" as DALPT, RTLPT or RTECON</li> </ul>
	Expected Outcome	Market Participants verify e-Tags in their own Web Smart Tag system for denial. CAISO Operators will verify denial in ITS.

# WEIM Resource Sufficiency Evaluation Redesign Phase2

Scenario Number	Structured scenario (RSEE2 Track -2)	
3	Description	Verify Pro-Rata curtailment of low priority exports
	ISO Actions	a) CAISO initiates EEA3 level alert. b) CAISO initiates pro-rata curtailments of low priority exports of G-FP eTags with the following CAISO Priority types: <ul style="list-style-type: none"> <li>• RTECON</li> <li>• RTLPT</li> <li>• DALPT (non-high priority DA export)</li> </ul>
	WEIM Market Participant Actions	Market Participants should do the following before EEA3 alert is issued a) e-Tag several export resources as "Firm Provisional Energy (G-FP)" (via Market Path product field). b) Mark "CAISO Priority Type" in "Misc Info" as RTECON, RTLPT, DAECON and/or DALPT
	ISO Market Participant Actions	Market Participants should do the following before EEA3 alert is issued c) e-Tag several export resources as "Firm Provisional Energy (G-FP)" (via Market Path product field). d) Mark "CAISO Priority Type" in "Misc Info" as RTECON, RTLPT, DAECON and/or DALPT
	Expected Outcome	Market Participants verify curtailed G-FP e-tags in their own Web Smart Tag system. CAISO Operators will verify ITS for the curtailed G-FP e-tags.

# WEIM Resource Sufficiency Evaluation Redesign Phase2

Scenario Number	Unstructured scenario (RSEE2 Track -2)	
4	Description	Verify ADS instructions include Market Priority when HASP results broadcast to ADS: CRN_ID, DAPT, DALPT, RTPT, RTLPT, RTECON
	ISO Actions	N/A
	WEIM Market Participant Actions	Market Participants should submit bids for different priority types on the same Resource or Transaction ID in order for ADS to dispatch one resource with more than one priority type. (i.e. submit a DA SS LPT on a specific resource or transaction ID, then also submit a RT SS LPT and a RTECON bid on that same resource or transaction ID)
	ISO Market Participant Actions	Market Participants should submit bids for different priority types on the same Resource or Transaction ID in order for ADS to dispatch one resource with more than one priority type. (i.e. submit a DA SS LPT on a specific resource or transaction ID, then also submit a RT SS LPT and a RTECON bid on that same resource or transaction ID)
	Expected Outcome	Market Participants verify in ADS Market Priority CAISO Operators verify in ADS Market Priority
	Anticipated Settlement Outcome	N/A
	Expected Settlement Outcome	N/A