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		Version No.	7.1
		Effective Date	9/11/23
Manual Dispatch on Interties		Distribution Restriction: None	

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Purpose


Provides guidelines to manually Dispatch and Schedule Energy on the interties in the event of a HASP Market failure, critical application failures that affect HASP results, forecasting errors, and other reliability reasons that require a correction of Imbalance Energy for the next operating hour.

Additionally this procedure outlines the necessary communication, processes, and documentation for Manual Dispatch (Energy or Capacity) of Intertie resources.

1. Responsibilities

Scheduling Coordinator (SC)	Submits Bids for RT Energy imports/export Bids before the HASP deadline, which is 75 minutes prior to the start of the Operating Hour and monitor ADS.
CAISO Market Operator	Determines the requirement for RT Energy and dispatches the associated RT and Capacity Energy Bids through ADS.

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CAISO Generation Dispatcher	Approves the Dispatch from RTM and communicates any changes to the Transmission Dispatcher.
CAISO Transmission Dispatcher	Confirms availability of Transfer Capability on the specific Intertie, manually dispatches Energy by calling the responsible SC and ensures that Market Awards are entered into the Interchange transaction scheduler, automatically or manually.
CAISO Manager, Real-Time Operations	If the resources needed to maintain system reliability in a timely manner are not available through normal CAISO market procedures, the Manager of Real-Time Operations is authorized and required to direct CAISO Real-Time (RT) personnel to arrange Manual Dispatch through CAISO Bid List (SIBR/FIT).

2. Scope/Applicability

2.1. Background

The **California ISO (CAISO)** has the responsibility to maintain System Reliability and take immediate action to maintain or re-establish required or necessary Operating Reserves. A Manual Dispatch on an Interconnection is used for procuring additional Energy or reducing excess Energy that was not awarded by the CAISO market. A Manual Dispatch can be used either in the event of a Supply deficiency event, an Overgeneration event, or in response to a HASP/RTM failure or other critical application failure that causes Imbalance Energy to affect reliability. The CAISO can buy from or sell to entities other than CAISO Market Participants during periods when the CAISO determines that it may not be able to maintain the Reserve Margin in future hours or resources in the CAISO Bid List (SIBR/FIT) are insufficient. Any such purchases or sales must be settled consistent with procedures specified in the CAISO Tariff and the BPMs.


In order to reduce disputes, the CAISO Real-Time Operations personnel are responsible for clear communications of Manual Dispatch with SCs.

Note: *Entering manually dispatched interties into the RTN application satisfies logging requirements. A log entry will only be required if the requisite Resource ID, Transaction ID, is not in RTN and said resource is manually dispatched.*

2.2. Scope/ Applicability

This procedure applies to the responsible Scheduling Coordinator, the **Market Operator**, the CAISO Generation **Dispatcher**, the Transmission **Dispatcher**, and the CAISO **Manager of**

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Real-Time Operations. If the Intertie resource has submitted a bid in the RTM market for the operating hour then it will be settled at 'bid or better' price, however the determination of whether the transaction is settled at the bid price or a better price is not determined by Real-Time operations. This process occurs as part of the settlements process.

3. Procedure Detail

3.1. Manual Dispatch of Interchange Transactions

The following describes the Manual Dispatch of Transactions utilizing Bids submitted in HASP that were not awarded in the HASP process and sent to ADS, in coordination with the responsible SC. This could be due to Market Disruption, Software Limitation, Transmission Outage, System Emergency (or prevention thereof), Overgeneration or Conditions beyond the control of the CAISO.

RTM Commodities Bid List


The Transmission Dispatcher secures the HASP/RTM commodities Bid list from FIT. At a minimum, the display includes the following information:

- Price
- Tie point at which the Bid was submitted
- Responsible SC which submitted the RT Energy Bid
- Market ID for the Interchange transaction
- Stack Type (Increment or Decrement)
- MW value

Note: Typically, ADS Interchange Dispatch Instructions are automatically dispatched to SCs with awarded Energy Bids. However, in the event of a HASP Market Failure, it may be necessary to manually Dispatch HASP/RTM Market Bids from the commodities Bid list, if available in FIT, and then enter the associated market awards into Interchange transaction scheduler.

Take the following actions to issue a manual dispatch:

CAISO Generation Dispatcher, CAISO Manager of Real-Time Operations
<ol style="list-style-type: none"> 1. Determine the need for a manual dispatch on the CAISO Interties per CAISO Operating Procedures 2210 Real-Time Market Activities and 4420 System Emergency. 2. Inform the Transmission Dispatcher of the amount, Inc or Dec, and location.

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CAISO Transmission Dispatcher
<ol style="list-style-type: none"> 1. Utilize, whenever possible, as times allows, resources in the CAISO Bid List (SIBR/FIT), and dispatch these Intertie resources in merit order. 2. Verify there is available room on the selected intertie to ensure the energy and any associated capacity can be delivered. 3. If the HASP/RTM fails or is not reliable for an hour: <ul style="list-style-type: none"> • Use the previous hour's bids. 4. If the HASP/RTM fails or is not reliable for multiple hours: <ul style="list-style-type: none"> • Use the last set of valid bids. 5. Establish with the entity clear verbal agreements with the following information: <ul style="list-style-type: none"> • Market ID • Accepted GOTO MWs • Hour-ending • Agreed up-on Price or state "Bid or Better"

3.2. Manual Dispatch Interchange Accounting

Take the following actions to create a market award in Interchange transaction scheduler and E-Tag the bi-lateral arrangements, as required by Manual Dispatch non-market Interchange accounting:

CAISO Transmission Dispatcher
<ol style="list-style-type: none"> 1. Request the Scheduling Coordinator/Purchasing Selling Entity (PSE) to create an E-Tag.


Scheduling Coordinator (SC), Purchasing-Selling Entity (PSE)

1. SC/PSE to submit NERC E-Tags to match the manual dispatch.

If a Resource ID was used for the manual dispatch: Include the following in the MISC field of the E-Tag Physical Path:


Token	Value
CAISO_CONTRACT	“NONE” for Market Transmission
CAISO_PRODUCT	“ENGY”
CAISO_RES_ID	Resource ID as registered in the CAISO Master File

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Scheduling Coordinator (SC), Purchasing-Selling Entity (PSE)			
2. If a Transaction ID was used for the manual dispatch: <ul style="list-style-type: none"> • Indicate the Transaction ID in the OASIS field of the E-Tag: • Include the following in the OASIS field: 			
Transmission Allocation			
TP	Owner	Product	OASIS
"-----"	"-----"	"-----"	"-----"
CISO	"-----"	"-----"	XXXX-XXXX_XXX-XXXX-XXXX-X-X-XXXX

CAISO Transmission Dispatcher
1. Create/Update Interchange transaction scheduler Market Award using information provided on the E-Tag or as agreed upon over the phone with the SC/PSE. 2. Confirm Market ID: Market ID. 3. Confirm SCID: Use valid SC ID if available, otherwise use ZISO. 4. Log the Manual Dispatch in the ED tool of market software. For more information on how to log in RTN, see CAISO Desktop Procedure INT-029 Manual Dispatch on the Interties . 5. If the Resource ID/Transaction ID does not exist in RTN, log in SLIC; refer to Section 3.4 for details on creating SLIC log entries.

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3.3. Manual Dispatch via an Intermediary Entity

When canvassing for Manual Dispatch Energy during a CAISO Supply deficiency event, if an entity is able to provide/receive Energy but is unwilling to do business directly with the CAISO, then perform the following steps:


CAISO Transmission Dispatcher
<ol style="list-style-type: none"> Contact/canvas third parties <u>and</u> inform the third party that an entity is able to provide/receive Energy, but is unwilling to do business with the CAISO directly and requests that another entity act as an intermediary, with the CAISO. If the third party entity accepts the request to act as an intermediary: <ul style="list-style-type: none"> Communicate, record, and document the agreement identical to a normal Manual Dispatch with the intermediary third party, per instruction in previous steps with two (2) additional considerations: <ul style="list-style-type: none"> The agreed upon price is between the third party intermediary and CAISO. Third party intermediary should include all costs (CAISO and provider/receiver) when determining the selling price to the CAISO. If the Resource ID/Transaction ID does not exist in RTN: <ul style="list-style-type: none"> The SLIC log entry <u>must include</u> explanation of the intermediary arrangement such as, <ul style="list-style-type: none"> Entity requiring an intermediary Contact person Name of any entities identified as acceptable Energy providers/receivers
<p>Note: The cost of the Manual Dispatch Energy/Capacity will be charged to CAISO Load and not to either of the entities involved.</p>

3.4. Manual Dispatch Transaction Records

Take the following actions to create a SLIC log entry:

CAISO Transmission Dispatcher
<ol style="list-style-type: none"> Complete a SLIC log entry if the Resource ID/Transaction ID does not exist in RTN, which includes the detailed transaction information from Section 3.1. <ul style="list-style-type: none"> Log the following required entries into SLIC: <ul style="list-style-type: none"> <u>Log Type</u> – RT Scheduling. <u>Title</u> – EDE Instructions for Interties/Corrections-96 Hour. <u>Event DTS Date</u> – The effective date of the ED. This is the date the energy is supplied and NOT the date the ED entities are contacted, which may be different for exceptional dispatches.

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CAISO Transmission Dispatcher
<ul style="list-style-type: none"> ○ <u>Event DTS Time</u> – The effective time of the ED. This is the time the energy/capacity is supplied and NOT the time the ED entities are contacted. ○ <u>Short Description</u> – Provide a short description of the event. ○ <u>Operating Date</u> – The effective date of the MD. This will be the same as the Event DTS Date. ○ <u>HE</u> – The effective time of the MD, in hour ending format. ○ <u>Reason</u> – Depending on the reason for the ED, choose either Market Disruption, System Energy, or Unit DE commitment of RAS Resource during TX Maintenance. ○ <u>Market ID</u> – Each Resource ID or Transaction ID that is manually dispatched should be listed only once. ○ <u>Resource available MW value</u> for the associated Market ID. This will reflect the SIBR/FIT market bid and what the Transmission Dispatcher has manually changed to the market award, to reflect the manual dispatch.

4. Supporting Information

Operationally Affected Parties


Shared with the Public.

References

Resources studied in the development of this procedure and that may have an effect upon some steps taken herein include but are not limited to:

CAISO Tariff	Sections 34.9.1 and 42.1.5
CAISO Operating Procedure	2210 Real-Time Market Activities
NERC Requirements	
WECC Criterion	
Other References	

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Definitions

Unless the context otherwise indicates, any word or expression defined in the Master Definitions Supplement to the CAISO Tariff shall have that meaning when capitalized in this Operating Procedure.


The following additional terms are capitalized in this Operating Procedure when used as defined below:

Automatic Dispatch System (ADS)	CAISO electronic automatic Dispatch system which issues automatic Dispatch Instructions to the Responsible SC, when a RT Market Energy Bid is awarded by RTM.
Non-Market Participants	Refers to Capacity or Energy transactions with entities other than SCs or entities represented by SCs, in the CAISO markets. These transactions are with entities with which the CAISO has no SC Agreement.
Interchange Transaction Scheduler	The Interchange transaction scheduler program manages Interchange transactions, provides Net Scheduled Interchange (NSI) to EMS and RTM, and Facilitates hourly NSI and Net Actual Interchange (NAI) check-out with adjacent Balancing Authorities (BA). NSI for each hour is based upon implemented Interchange Schedules (NERC E-Tags) requested and submitted by the Market Participant's SC/PSE.

Version History

Version	Change	Date
6.8	<p>Sections 1, 3.1, 3.2, 3.3, & 3.4: Changed all instances of Interchange Scheduling Desk/Interchange Scheduler to Transmission Desk/Transmission Dispatcher.</p> <p>Section 2.1: Removed the word ISO from supply deficiency and Overgeneration event in order to allow the procedure to cover a larger scope of work.</p> <p>Added the term Emergency Resource ID to the note, since we are incorporating Emergency Resources in Section 3.1 of the Procedure.</p> <p>Section 2.2: Added a sentence discussing this procedure's applicability to Balancing Authority (BA)-to-BA reliability related transactions.</p> <p>Section 3.1: Changed title of section Manual Dispatch of Interchange Transactions. Combined Steps 4 and 5 to have the procedure read better and more efficiently. Added the term Price</p>	7/03/19

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	to the list of terms. Added an additional set of steps for BA-to-BA reliability related manual dispatches. Revised Sections 3.1 and 3.2 to remove Emergency Assistance related verbiage. Clarified language throughout the procedure. Section 3.2: Deleted MRTU from the Resource ID Value box. Minor format and grammar updates.	
7.0	Periodic Review: Minor edits for consistency, format and grammar updates and removed history prior to 5-years.	11/24/20
7.1	Periodic Review: Updated all instances of ISO to CAISO and spelled out first instance. Updated from Real-Time Market Desk and RTM Operator to Market Operator. Updated from Generation and Transmission "Desk" to "Dispatcher" and updated from Shift Manager to Manager, Real-Time Operations and Manager of Real-Time Operations. Section 3.2: Minor edit to #5. Section 3.4: Minor edit to #1. Minor formatting and removed history prior to five years.	9/11/23

5. Periodic Review Procedure

Review Criteria & Incorporation of Changes

There are no specific criteria for reviewing or changing this document, follow instructions in CAISO Operating Procedure 5510.

Frequency

Every three (3) Years.

Appendix

No references at this time.

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