 California ISO	Operating Procedure	Procedure No.	5210A
		Version No.	9.0
		Effective Date	10/01/24
Transmission Desk Logging		Distribution Restriction: None	

1. Procedure Detail

1.1. Purpose

Provides guidelines for the different logging scenarios used by the CAISO Transmission Desk. For further guidance on the proper technique for creating clear and concise free-form content in SLIC logs, refer to CAISO Desktop Procedure [OP-SO-013 CAISO Writing Guide for Operations Logs and SLIC Reports](#).

Maintaining detailed and up-to-date operator logs is crucial for demonstrating compliance with NERC Reliability Standards. Accurate logs serve as a verifiable record that can be scrutinized during audits, providing clear evidence of a system operator's actions and decisions. This documentation is not only a regulatory requirement, but also a best practice that supports the integrity and transparency of operations. As such, operator logs are a key component in the audit process, aiding auditors in assessing compliance, identifying areas for improvement, and contributing to the overall resilience and security of the power grid.

Since Settlements reconciles or is supported by data from these entries, accurate and detailed log entries are critical. Discrepancies between log entries and the records of the other entities can result in disputed settlement data.


1.2. Transmission Logging Types

The following table represents Transmission Desk-specific log types and their descriptions for use. This table is separated into two sections for Transmission Desk log types and Real-Time (RT) Scheduling for logs specific to the Interchange Scheduling and Transmission (IS&T) desk.

See CAISO Operating Procedure [3110 Coordinated Operation for Reliability](#) and RC West Operating Procedure [RC0130 Notification Requirements for Real-Time Events](#) for additional information regarding required notifications, communication medium, and time requirements.


General notes for logging:

- For all unplanned outages, include the OMS number and Estimated Time to Return (ETR).
- For all communications, include the entity and contact name.


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Log Type: Transmission Desk	
Log Title	Purpose
Circulation on Intertie	Log request to circulate on PDCI for mitigation purposes. Circulation to maintain flow when schedules are below minimum power order is recorded in the market.
Environmental Issue	Log report of any environmental occurrence other than fire and RC notification if grid-impacting.
Fire	Log initial report of fires that affect the reliability of the grid and RC notification. <i>Include the following at a minimum (if known):</i> <ul style="list-style-type: none"> • Name of fire • Location • Distance of fire from any facilities • Estimated size (acres) • Direction the fire is burning • Wind conditions • Fuel source (grass, brush, timber, etc.) • Rate of spread • Agencies responding or already on scene • Facilities involved or threatened
Fire Update	Log any updates to ongoing fires that affect the reliability of the grid and RC notification.
Line Event	Log any line event that affects a line's normal performance and RC notification if BES line. <i>Some examples include (but are not limited to):</i> <ul style="list-style-type: none"> • Line forced out of service <ul style="list-style-type: none"> ◦ Include Urgent Outages (those which have not yet occurred but carry increased risk of being Forced) • Line opened/closed/paralleled (unplanned) • Any other unplanned performance-impacting event
Line Relay	Log incidents where a line relays, results of test if conducted, any facility interruptions, and RC notification if BES line (Note: momentary outages of equipment less than 300 kV lasting for less than 5 minutes do not require a phone call). <ul style="list-style-type: none"> • Ensure the end time is recorded in SLIC if the line RTS during either the same shift or the same operating day, whichever is later.
Path Transfer Capabilities	Log changes in intertie transfer capabilities and RC notification if unplanned.
RAS/SPS Maintenance	Log RC notification at commencement and conclusion of planned outage of a BES RAS when RAS functionality or definition is impacted and ICCP is not available.
RAS/SPS Operation	Log instances of any RAS/SPS activation and RC notification if BES RAS.


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Log Type: Transmission Desk	
Log Title	Purpose
RAS/SPS Trouble	Log trouble with any RAS/SPS which result in loss of visibility or renders it inoperable or with reduced capabilities and RC notification if BES RAS.
RTCA Failure	Log actions and notifications per CAISO OP 5410 Loss of Monitoring and Analysis Tool Functionality (see SE_RTCA tab).
Substation Event	<p>Log any event that affects a substation or the reliability of the grid and RC notification if BES equipment. <i>Some examples include (but are not limited to):</i></p> <ul style="list-style-type: none"> • Unplanned circuit breaker operation • Substation equipment (i.e., bus, transformer bank, reactive device, etc.) damaged, relayed, or forced out of service • Loss of visibility >30 minutes (telemetry outages)
Transmission Mitigation	<p>Log any thermal or voltage violation and RC notification per CAISO OP 3110 Coordinated Operation for Reliability.</p> <ul style="list-style-type: none"> • For voltage violations, utilize the Max Flow attribute for the maximum kV exceedance. • For Compliance, include time of RC notification.
Transmission Voltage Control	Log when a transmission line is de-energized for voltage control and RC notification if BES equipment.
Unique Transmission Communication	<p>Log any event that affects Grid transmission and applicable notifications, which cannot be recorded in any other Transmission desk log. <i>Examples include (but are not limited to):</i></p> <ul style="list-style-type: none"> • Area voltage control actions including <ul style="list-style-type: none"> ○ Generation Exceptional Dispatch (ED) ○ PG&E voltage orders ○ Voltage control actions coordinated between entities • Emergency notice (i.e., Transmission Emergency declaration) • Load shed for mitigation (pre- or post-contingent) • Coordination with PTO of RAS arming setting changes (i.e., Path 15 IRAS) • Special communication or requests between CAISO and PTO • Issues with tools, applications, or communications that impact reliability

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Log Type: RT Scheduling	
Log Title	Purpose
EDE Instructions for Interties/Correction-96 Hour	Log Exceptional Dispatch Instructions for manual dispatch on the Interties if unable to enter in the market tool (see CAISO Desktop Procedure INT-029 Manual Dispatch and Emergency Assistance on the Interties for more information).
Intertie Emergency Assistance	Log Exceptional Dispatch Instructions for Intertie Emergency Assistance events with other BAs if unable to create in the market (see CAISO Desktop Procedure INT-029 Manual Dispatch and Emergency Assistance on the Interties for more information). Use the free text field to include the details described below in the Unique Scheduling Event log.
Unique Scheduling Event	<p>Log any event that affects Interchange, which cannot be recorded in any other RT Scheduling type log. <i>Examples include (but are not limited to):</i></p> <ul style="list-style-type: none"> • Emergency assistance (conversation only) <ul style="list-style-type: none"> ○ Requestor/grantor and entity ○ Amount of assistance (MW) ○ Timeframe ○ Resource (or transaction) ID ○ Tag code ○ Notifications • Reliability curtailments <ul style="list-style-type: none"> ○ Dispatcher ○ Impacted ITC/ISL ○ Curtail amount from (schedule) / to (constraint) ○ Timeframe ○ Reason (if known) <ul style="list-style-type: none"> ▪ Example: TD/Name curtailed XXXX_ITC from XXX MW to the export constraint of XXX MW for HEXX due to an under tagged import award. • Stranded load changes • Tag reload • Manual ramping of NSI • Issues with tools, applications, or communications that impact reliability
USF Mitigation	Log Unscheduled Flow mitigation events.

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1.3. Nightly Log Reviews

While it is every dispatcher's responsibility to ensure they create coherent and complete logs, it is expected that Lead Transmission Dispatchers will review all Transmission and RT Scheduling type logs created during the operating day on their night shift. These log reviews are meant to ensure that there is no missing or incomplete information in the day's logs prior to the IGOR publication at 0200.

Log reviewers should (at a minimum):

- Ensure entries are complete (i.e., no missing end times)
- Ensure entries are clear and concise
- Ensure entries contain sufficient information to be interpreted by non-operations personnel
- Ensure equipment is referenced correctly
- Ensure any jargon or abbreviations are contained in the CAISO [System Operations Dictionary SharePoint Site](#)
- Ensure entries use style and nomenclature as described in CAISO Desktop Procedure [OP-SO-013 CAISO Writing Guide for Operations Logs and SLIC Reports](#)
- Correct any spelling or grammar errors

2. 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	
CAISO Operating and Desktop Procedures	3110 Coordinated Operation for Reliability 5410 Loss of Monitoring and Analysis Tool Functionality OP-SO-013 CAISO Writing Guide for Operations Logs and SLIC Reports

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	<u>INT-029 Manual Dispatch and Emergency Assistance on the Interties</u>
RC West Operating Procedure(s)	<u>RC0130 Notification Requirements for Real-time Events</u>
NERC Requirements	
WECC Criterion	
Other References	<u>System Operations Dictionary SharePoint Site</u>

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:

None

Version History

Version	Change	Date
7.5	Added Interchange logging information that was contained within OP 5210C. Removed Section 1.4, Planned Transmission Outages, as it is no longer necessary and renumbered remaining Sections. Section 1.4, is now General Logging Criteria - additional changes: Removed line e), Changes in Transmission Biasing portion from the table, as it is no longer needed. Section 1.5, Specific Logging Criteria: Removed several requirements from the Logging table and added new requirements. Minor formatting and grammar improvements.	6/20/19
8.0	Periodic Review: Added Sections 1.6 & 1.7, which were taken from procedure 5210B, as they apply to Transmission Desk. Minor format and grammar updates.	8/28/20
8.1	Periodic Review: Replaced ISO with CAISO, replaced AWE Stage and AWE with EEA, and replaced terminated with ended. Removed history prior to five years. Updated task table title from CAISO Transmission "Desk" to "Dispatcher" in Section 1.3.	8/17/23

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Version	Change	Date
8.2	Section 1.7: Replaced Shift Manger with Manager of Real-Time Operations.	9/11/23
9.0	Major Update/Rewrite: Split logging Requirements table into the two desk log types. All active log types have been included with explanations and clarifications when each should be used. Added several log titles not previously included. Minor formatting and grammar edits and removed history prior to five years.	10/01/24