





Western Energy Imbalanced Market (WEIM) Procedure to set up new Non- Participating Resources and Participating Resources or End Date / Remove Resources

Revision 2.2
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 California ISO	SC Certification/Maintenance	Template Version No.	2.2
Western Energy Imbalanced Market (WEIM) Procedure to set up new Non-Participating Resources and Participating Resources or End Date / Remove Resources		Revision Date	March 14, 2022
		Distribution - External	WEIM Entity / WEIM SCs / ISO

Version	Date	Updated By	Description
2.2	3/10/2021	L. Collins	Change order of one step to have WEIM Entity approval notification to be sent AFTER all the prerequisites are completed in order to not have a CID case open more than 30 days. And updating EIM to WEIM
2.1	9/28/2021	L. Collins	Adding links for full network model process and steps for SQMD/SLD submittal Adding process steps to remove resources
2	6/23/21	N Hines	Updating formatting, added additional information to clarify process
1		L. Collins	Initial Publication

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1. Purpose

This document describes the processes to complete implementation/onboarding of new Western Energy Imbalance Market (WEIM) resources. The first two sections cover new non-participating resources (NPRs) and new participating resources (PRs) that have been added to the Full Network Model (FNM). The third section reviews steps for converting existing non-participating resource into WEIM participating resources.

- New non-participating resource setup
- New participating resource setup
- Convert non-participating resource to participating resource setup
- End dating/removing of a resource

All WEIM resources must complete the model submission and new resource implementation process as outlined in the Modeling Submission checklist. This includes obtaining a project code and completion of the Settlements Quality Meter Data (SQMD), Single Line Drawing (SLD), and Generator Resource Data Template (GRDT) requirements. This document reviews steps required once those requirements from the Modeling Submission checklist have been met.

When onboarding a new resource or transitioning a non-participating resource to a participating resource, the following will be required:


- 1) Model requirements met (for both reliability and market purposes), including SQMD Plans and GRDT requirements
- 2) Contract requirements: Schedule 1 update or initial submission provided. This is for WEIM Participating Resources only.
- 3) Scheduling Coordinator (SC) letters – provided via the Customer Inquiry Dispute and Information (CIDI) system, and will be used to coordinate association to resource by the Customer Readiness onboarding team

The document linked below outlines the process to submit the ongoing obligations, including documents for WEIM new resource setup and WEIM resource transfers via CIDI: <http://www.caiso.com/Documents/How-to-Submit-Documents-for-Applications-and-Ongoing-Obligations.pdf>.

The information in the following sections is to provide step-by-step instructions and links to the various documents along with who is to perform and complete each step (owner).

First, determine which implementation to process.

- New WEIM Resource Setup
 - Non Participating Resource (section 2)
 - Participating Resource (section 3)
- Conversion of Non Participating Resource to Participating Resource (section 4)
- Removal of WEIM Resource (section 5)

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2. New Non-Participating Resource setup


Audience: WEIM Entity SC

Assumptions/Prerequisites *:

- The resource and WEIM entity has submitted for and completed requirements as outlined in the Model Submission Checklist (items 3-9). This includes:
 - [Modeling Submission Checklist](#)
 - The resource submission and identified model implementation to CAISO Full Network Model per Full Network Model Process.
 - Project code created per SCME requirements, and
 - SQMD and SLD need to have been accepted by the ISO
 - Note: If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and WEIM Entity

Non Participating Resource Steps:

Step	Owner	Action
1.	WEIM Entity SC	See Assumptions and Prerequisites * The WEIM Entity SC must submit a Settlement Quality Meter Data (SQMD) Plan at least 40 calendar days <i>before</i> the transfer letters are due to the ISO. The resource setup process cannot be started until the SQMD plan is approved by the ISO.
2.	WEIM Entity SC	Once the SQMD, SLD have been accepted, the WEIM Entity SC submits a request via CIDI ** requesting the next possible effective date to setup a new non-participating resource in master file <i>Note, the next possible effective date should be at least 10 business days from current date but not more than 30 days.</i>
3.	ISO SC Requests Group	The ISO SC Requests group notifies the WEIM Entity SC of the earliest effective date. The New SC Acceptance letter should be submitted, along with the GRDT and RCA Disclosure form, via the CIDI application at least 10 business days prior and no more than 30 days in advance of the effective date provided by SC Requests.
4.	WEIM Entity SC	The New SC Acceptance letter should be submitted, along with the GRDT and RCA Disclosure form, via the CIDI application at least 10 business days prior and no more than 30 days in advance of the effective date provided by SC Requests. Via the CIDI case opened in step 2.
5.	ISO SC Requests Group	The ISO SC Requests group will review and submit approval, after completing processing which includes validation the resource is in the model and all appropriate documents have been submitted correctly.

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Step	Owner	Action
6.	ISO SC Request Group	<p>The Resource setup change request is processed. Via the CIDI case opened in step 2.</p> <ol style="list-style-type: none"> 1) Notification of the completed change request is sent to the WEIM Entity SC once the change request is closed. 2) If access is provisioned at the Scheduling Coordinator (SCID) or Access Control List (ACL) level, the resource will be visible in: <ol style="list-style-type: none"> a) Scheduling Infrastructure and Business Rules (SIBR), Base Schedule Aggregation Portal (BSAP), and Outage Management applications the day prior to the effective transfer date b) Automated Dispatch System (ADS) and Outage Management System (OMS) the day before the effective transfer date for if the access is provisioned at the Schedule Coordinator ID (SCID) level; if provisioned at the Access control list (ACL) level (sub-grouping), the request cannot be submitted until the effective date.
<p>**Important Note: The SQMD/ SLD plan must be accepted before the setup process can begin.</p> <p>Any questions regarding this process, please contact SCRequests@caiso.com or submit a CIDI inquiry ticket to Onboarding and Maintenance.</p>		

3. New Participating Resource setup

New resources that are being added (not converting from an existing non-participating resource)

Audience:


1. Participating Resource SC
2. WEIM Entity SC
3. Participating Resource Owner

Important note: The setup of the fuel region and the Major Maintenance Adder (MMA) are separate from this process. Refer to the Market Instruments Business Practice Manual (BPM) for Fuel Regions and MMA information. The BPM Library is found at:

<https://bpmcm.caiso.com/Pages/BPMLibrary.aspx>

Also see Additional Information page 20.

Assumptions/Prerequisites *:

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- The resource and WEIM entity has submitted and completed requirements as outlined in the Model Submission Checklist (items 3-9). This includes:
 - [Modeling Submission Checklist](#)
 - The resource submission and identified model implementation to CAISO Full Network Model per Full Network Model Process.
 - Project code created per SCME requirements, and
 - SQMD and SLD need to have been accepted by the ISO
 - Note: If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and WEIM Entity
- WEIM Entity will provide approved PR notification
 - Send approval email to SCRequests@caiso.com or add comment/email to CIDI case.
 - Here is a sample of the WEIM Entity approved participating resource notification

This is official notification to the WEIM Market Operator that the [BA Name] WEIM Entity has verified that the [BA Name] resources listed below have met all [BA Name] WEIM Entity requirements to participate in the Energy Imbalance Market. Please confirm that these resources have met all requirements of the WEIM Market Operator to become participants and that the ending date in the letter is approved. Thank you.

Resource Name	Resource ID	Project Number
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NOTE: For Hybrid / Co-located resources, add this information to the notification for each applicable resource

Hybrid / Co-located	Resource ID	Min MW at POI	Max MW limit at POI	Substation Name and Voltage Level at POI
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New Participating Resource Onboarding Steps:


Step	Owner	Action
1.	WEIM Participating Resource Owner	<p>The Resource Owner sends an email to RDT@caiso.com to verify the resource is already modeled in the ISO FNM</p> <ol style="list-style-type: none"> 1) Please cc: SCRequests@caiso.com and include WEIM in the subject line. 2) Please provide the resource name and the resource ID. 3) A validation of whether the resource(s) have been modeled in the ISO FNM will be sent back to the Resource Owner. 4) If the resource is not yet in the ISO FNM, please work with WEIM Entity to get the resource modeled in the ISO FNM
2.	WEIM Participating Resource SC	<p>The Scheduling Coordinator for the Participating Resource should consider whether they want to create a new SCID to separate their WEIM business from their CAISO-only business</p> <ol style="list-style-type: none"> 1) Every active SCID incurs a monthly Grid Management Charge (GMC). Please refer to GMC charges posted on the Settlements page of ISO website - http://www.caiso.com/market/Pages/Settlements/Default.aspx 2) Link to the Additional SCID procedure and form - http://www.caiso.com/Documents/ExistingSchedulingCoordinatorRequestsAdditionalSCID-LetterTemplate.doc 3) The GRDT for all resources for an WEIM Participating Resource SC is visible to the WEIM Entity. This means that any other units under that SCID that is not in that WEIM Entity's Balancing Authority (BA) is also visible to the WEIM Entity 4) Link to WEIM GRDT – http://www.caiso.com/Documents/EnergyImbalanceMarketGeneratorResourceDataTemplate.xls 5) GRDT definitions - http://www.caiso.com/Documents/GRDTandIRDTDefinitions.xls 6) Provisioning of access for ADS and OMS for participating resources is easiest when the Resource Owner is provisioned access at the SCID level. A sub-grouping called an Access Control Group (ACL) can be created to separate WEIM resources from other resources. If sub-groups are preferred, the ACL can be provisioned only <i>after</i> the resource becomes effective in the Master File system. Use of ACLs will require coordination with the User Access Administrator (UAA) - more information on use of ACLs can be found in the AIM User Guide

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Step	Action Owner	Action
3.	WEIM Participating Resource SC	If needed, create a new additional BSCID: For third party resources (resources in the WEIM BA that are not owned by the WEIM Entity) the WEIM Participating Resource SC should request an additional Base Schedule ID (BSCID)—if one doesn't already exist— via CIDI ticket. Make sure to provide the Resource Owner name. This needs to be requested and setup in advance at least 30 days before effective start date.
4.	WEIM Participating Resource SC	See Assumptions and Prerequisites * The WEIM Participating Resource SC must submit the SQMD Plan as described in Assumptions/Prerequisites and the Modeling Submission Checklist at least 40 calendar days <u>before</u> the transfer letters are due to the ISO. The resource setup process cannot be started until the SQMD plan is approved by the ISO.
5.	WEIM Participating Resource Owner	The Participating Resource Agreement Schedule 1 must list the resource that is being newly setup and associated to the SCID of the WEIM Participating Resource SC. If the resource is not listed on the Schedule 1, the WEIM Participating Resource Owner First, send an email to RegulatoryContracts@caiso.com , to request a copy of the Schedule 1 of the Participating Resource Agreement - Please cc: SCRequests@caiso.com and RDT@caiso.com .
6.	ISO Regulatory Contracts	The ISO Regulatory Contracts group sends the WEIM Participating Resource Owner the Schedule 1 to redline.
7.	WEIM Participating Resource Owner	The WEIM Participating Resource Owner emails the updated/redlined Schedule 1 back to RegulatoryContracts@caiso.com indicating the new resource/s. Please cc: SCRequests@caiso.com and RDT@caiso.com . The RDT group and the Regulatory Contracts group will validate the Schedule 1

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Step	Owner	Action
8.	ISO Regulatory Contracts	The Regulatory Contracts group notifies the WEIM Entity of the updated Schedule 1 and proposed WEIM Participating Resource(s), and requests final approval from the WEIM Entity. <ul style="list-style-type: none"> 1. The WEIM Entity emails final approval that the resource(s) has met all their requirements – email to RegulatoryContracts@caiso.com and cc: SCRequests@caiso.com and RDT@caiso.com. 2. Regulatory Contracts updates the Schedule 1 and sends out the notification to the WEIM Participating Resource Owner.
9.	WEIM Entity	Sends an official notification request to SCRequets@caiso.com or via CIDI listing approved participating resources.
10	ISO SC Requests Group	The ISO SC Requests group notifies the WEIM Entity, the WEIM Participating Resource Owner, and the WEIM Participating Resource SC of the earliest effective transfer date. The Resource Owner SC Selection letter and the New SC Acceptance letters should be submitted at this time. The earliest effective start date is 10 business days from the date that the WEIM Entity sends the approval notification but not more than 30 days. ** See Important Note ** below.
11	WEIM Participating Resource Owner	The WEIM Participating Resource Owner submits the SC Selection letter with the effective start date as the date provided by the SC Requests group and submit via CIDI ticket. Start Date mm/dd/yyyy as the date provided by the SC Requests group, along with the GRDT (see step 10) The new SC can submit the Resource Owner letter along with the New SC Acceptance letter attaching to the CIDI ticket.
12	WEIM Participating Resource SC	The WEIM Participating Resource SC (new SC) submits an SC Acceptance letter with the effective Start Date mm/dd/yyyy as the date provided by the SC Requests group, along with the GRDT and RCA form (see step 10) and submits via CIDI ticket.
13	ISO SC Requests Group	The ISO SC Requests group approves of the resource submittals based on submission of the WEIM Entity notification and the letters, RCA form and GRDT are all correct.
14	ISO SC Requests Group	The ISO SC Requests group sends an update via CIDI notification to the WEIM Entity that the WEIM Participating Resource Owner, and the WEIM Participating Resource SC have met all the ISO transfer requirements and a change request is being submitted to transfer the resources from the WEIM Entity SC to the WEIM Participating Resource SC for the transfer effective date.
15	ISO SC Request Group	The Resource Setup change request is processed. <ul style="list-style-type: none"> 1) Notification of the completed change request is sent to all parties via CIDI ticket notification. 2) The resource will be visible the day before the effective transfer date for SIBR and BSAP applications and on the effective date for

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<p>ADS and OMS if the access is provisioned at the SCID level. If entity wants resource provisioned at the ACL level (sub-grouping), the request cannot be submitted until the effective date.</p>			
<p>**Important Note: The prerequisites must be completed before this setup process can begin. The letters must be submitted at least 10 business days, but no more than 30 days, prior to the earliest transfer date provided by the SC Requests group. If the transfer dates are not within the timeframe outlined, the transfer requests can be rejected and all new documentation will need to be submitted to fall within these timeframes.</p> <p>Letter templates are located on the ISO web site CAISO.com > Participate > Scheduling Coordinator > SC Changes > Resource Transfers: http://www.caiso.com/participate/Pages/SchedulingCoordinatorOngoingObligations.aspx</p> <ul style="list-style-type: none"> • Please do not modify the content of the letter templates • Each letter must be submitted on the company letter head of the entity submitting the letter (WEIM Entity SC vs WEIM Participating Resource Owner vs WEIM Participating Resource SC) <p>Any questions regarding this process, please contact SCRequests@caiso.com or submit a CIDI inquiry ticket to Onboarding and Maintenance.</p>			

4. Converting a non-participating resource to a participating resource steps

The process described in this section is for a resource which is already setup as a non-participating resource, but will be “transferred” to the WEIM Participating Resource SC to become a participating resource.

Audience:


1. Participating Resource SC
2. WEIM Entity SC
3. Participating Resource Owner

Important note: *The setup of the fuel region and the Major Maintenance Adder (MMA) are separate from this process.* Refer to the Market Instruments Business Practice Manual (BPM) for Fuel Regions and MMA information. The BPM Library is found at:

<https://bpmcm.caiso.com/Pages/BPMLibrary.aspx>

Also see Additional Information page 20

Assumptions/Prerequisites *:

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- The resource and WEIM entity has submitted for and completed requirements as outlined in the Model Submission Checklist (items 3-9). This includes:
 - [Modeling Submission Checklist](#)
 - The resource submission and identified model implementation to CAISO Full Network Model per Full Network Model Process.
 - Project code created per SCME requirements, and
 - SQMD and SLD need to have been accepted by the ISO
 - Note: If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and WEIM Entity
- WEIM Entity will provide a notification of approval. Here is a sample of the WEIM Entity approved participating resource notification

This is official notification to the WEIM Market Operator that the [BA Name] WEIM Entity has verified that the [BA Name] resources listed below have met all [BA Name] WEIM Entity requirements to participate in the Energy Imbalance Market. Please confirm that these resources have met all requirements of the WEIM Market Operator to become participants and that the ending date in the letter is approved. Thank you.

Resource Name	Resource ID	Project Number
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NOTE: For Hybrid / Co-located resources, add this information to the notification for each applicable resource


Hybrid / Co-located	Resource ID	Min MW at POI	Max MW limit at POI	Substation Name and Voltage Level at POI
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Converting a NPR to a PR Steps:

Step	Owner	Action
1.	WEIM Participating Resource Owner	<p>The Resource Owner sends an email to RDT@caiso.com to verify the resource is already modeled in the ISO FNM</p> <ol style="list-style-type: none"> 1) Please cc: SCRequests@caiso.com and include WEIM in the subject line. 2) Please provide the resource name and the resource ID. 3) A validation of whether the resource(s) have been modeled in the ISO FNM will be sent back to the Resource Owner. 4) If the resource is not yet in the ISO FNM, please work with WEIM Entity to get the resource modeled in the ISO FNM
2.	WEIM Participating Resource SC	<p>The Scheduling Coordinator for the Participating Resource should consider whether they want to create a new SCID to separate their WEIM business from their CAISO-only business</p> <ol style="list-style-type: none"> 1) Every active SCID incurs a monthly GMC. Please refer to GMC charges posted on the Settlements page of ISO website - http://www.caiso.com/market/Pages/Settlements/Default.aspx 2) Link to the Additional SCID procedure and form - http://www.caiso.com/Documents/ExistingSchedulingCoordinatorRequestsAdditionalSCID-LetterTemplate.doc 3) The GRDT for all resources for an WEIM Participating Resource SC is visible to the WEIM Entity. This means that any other units under that SCID that is not in that WEIM Entity's Balancing Authority (BA) is also visible to the WEIM Entity 4) Link to WEIM GRDT – http://www.caiso.com/Documents/EnergyImbalanceMarketGeneratorResourceDataTemplate.xls 5) GRDT definitions - http://www.caiso.com/Documents/GRDTandIRDTDefinitions.xls 6) Provisioning of access for ADS and OMS for participating resources is easiest when the Resource Owner is provisioned access at the SCID level. A sub-grouping called an Access Control Group (ACL) can be created to separate WEIM resources from other resources. If sub-groups are preferred, the ACL can be provisioned only <i>after</i> the resource becomes effective in the Master File system
3.	WEIM Participating Resource SC	<p>If needed, create a new additional BSCID:</p> <p>For third party resources (resources in the WEIM BA that are not owned by the WEIM Entity) the WEIM Participating Resource SC should request an additional Base Schedule ID (BSCID)—if one doesn't already exist— via CIDI ticket. Make sure to provide the Resource Owner name. . This needs to be requested and setup in advance at least 30 days before effective start date.</p>

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Step	Owner	Action		
4.	WEIM Participating Resource SC	<p>See Assumptions and Prerequisites *</p> <p>The WEIM Participating Resource SC must submit the SQMD Plan as described in Assumptions/Prerequisites and the Modeling Submission Checklist at least 40 calendar days <i>before</i> the transfer letters are due to the ISO. The resource transfer process from the WEIM Entity SC to the WEIM Participating Resource SC cannot be started until the SQMD plan is approved by the ISO.</p>		
5.	WEIM Participating Resource Owner	<p>The Participating Resource Agreement Schedule 1 must list the resource that is being newly setup and associated to the SCID of the WEIM Participating Resource SC.</p> <p>If the resource is not listed on the Schedule 1, the WEIM Participating Resource Owner First, send an email to RegulatoryContracts@caiso.com, to request a copy of the Schedule 1 of the Participating Resource Agreement - Please cc: SCRequests@caiso.com and RDT@caiso.com.</p>		
6.	ISO Regulatory Contracts	<p>The ISO Regulatory Contracts group sends the WEIM Participating Resource Owner the Schedule 1 to redline.</p>		
7.	WEIM Participating Resource Owner	<p>The WEIM Participating Resource Owner emails the updated/redlined Schedule 1 back to RegulatoryContracts@caiso.com indicating the new resource/s. Please cc: SCRequests@caiso.com and RDT@caiso.com.</p> <p>The RDT group and the Regulatory Contracts group will validate the Schedule 1</p>		
8.	ISO Regulatory Contracts	<p>The Regulatory Contracts group notifies the WEIM Entity of the updated Schedule 1 and proposed WEIM Participating Resource(s), and requests final approval from the WEIM Entity.</p> <ol style="list-style-type: none"> 1. The WEIM Entity emails final approval that the resource(s) has met all their requirements – email to RegulatoryContracts@caiso.com and cc: SCRequests@caiso.com and RDT@caiso.com. 2. Regulatory Contracts updates the Schedule 1 and sends out the notification to the WEIM Participating Resource Owner. 		
9.	WEIM Entity	<p>Sends an official notification request to SCRequests@caiso.com or via CIDI listing approved participating resources.</p>		
10.	ISO SC Requests Group	<p>The ISO SC Requests group notifies the WEIM Entity, the WEIM Participating Resource Owner, and the WEIM Participating Resource SC of the earliest effective transfer date. The Resource Owner SC Selection letter and the New SC Acceptance letters should be submitted at this time. The earliest effective start date is 10 business days from the date that the WEIM Entity sends the approval notification but not more than</p>		

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		30 days. See Important Note ** below.		
11.	WEIM Entity SC	The WEIM Entity SC submits an SC Relinquishing Letter via CIDI ticket with the transfer date minus 1 day for the effective end date.		
12.	WEIM Participating Resource Owner	<p>The WEIM Participating Resource Owner submits the SC Selection letter with the effective end date matching the transfer date minus 1 and the effective start date as the date provided by the SC Requests group and submit via CIDI ticket.</p> <p>Example: End date 6/1/2021 23:59:59 and Start Date 6/2/2021.</p> <p>The new SC can submit the Resource Owner letter along with the New SC Acceptance letter.</p>		
13.	WEIM Participating Resource SC	The WEIM Participating Resource SC (new SC) submits an SC Acceptance letter with the effective start date as the date provided by the SC Requests group (see step 10), along with the GRDT and RCA form via CIDI ticket.		
14.	ISO SC Requests Group	The ISO SC Requests group approves the resource transfer based on the submission and the transfer letters and GRDT are all correct		
15.	ISO SC Requests Group	The ISO SC Requests group sends an update via CIDI notification to the WEIM Entity that the WEIM Participating Resource Owner, and the WEIM Participating Resource SC have met all the ISO transfer requirements and a change request is being submitted to transfer the resources from the WEIM Entity SC to the WEIM Participating Resource SC for the transfer effective date.		
16.	ISO SC Request Group	<p>The Resource Transfer change request is processed.</p> <ol style="list-style-type: none"> 1) Notification of the completed change request is sent to all parties via CIDI ticket notification. 2) The resource will be visible the day before the effective transfer date for SIBR and BSAP applications and on the effective date for ADS and OMS if the access is provisioned at the SCID level. If entity wants resource provisioned at the ACL level (sub-grouping), the request cannot be submitted until the effective date 		
<p>**Important Note: The assumptions/prerequisites, including WEIM approval notification and SQMD requirements, must be completed before this setup process can begin. The letters (steps 10-12) must be submitted at least 10 business days but no more than 30 days prior to the earliest transfer date provided by the SC Requests group. If the transfer dates are not within the timeframe outlined, the transfer requests can be rejected and all new documentation will need to be submitted to fall within these timeframes.</p> <p>Letter templates are located on the ISO web site CAISO.com > Participate > Scheduling Coordinator > SC Changes > Resource Transfers: http://www.caiso.com/participate/Pages/SchedulingCoordinatorOngoingObligations.aspx</p> <ul style="list-style-type: none"> • Please do not modify the content of the letter templates • Each letter must be submitted on the company letter head of the entity submitting the 				

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<p>letter (WEIM Entity SC vs WEIM Participating Resource Owner vs WEIM Participating Resource SC)</p> <p>Any questions regarding this process, please contact SCRequests@caiso.com or submit a CIDI inquiry ticket to Onboarding and Maintenance.</p>			

5. End dating / removing a non-participating resource or a participating resource steps

This resource is being end dated in master file and removed from the model due to the resource being retired

Audience:


1. Participating Resource SC
2. WEIM Entity SC
3. Participating Resource Owner

Assumptions/Prerequisites:

- The WEIM entity will need to submit changes to remove the resource from ISO FNM following guidelines provided in the Modeling Submission Checklist.
- If a participating resource, this resource also needs to be removed from the Schedule 1 (steps outlined below).


Removing a Non-Participating Resource Steps:

Step	Owner	Action
1.	WEIM Entity SC	Submits a Relinquishing SC letter - Via the CIDI case
2.	WEIM Entity	After resource is end dated in master file, removes the resource from the next model in the ISO FNM

 California ISO	SC Certification/Maintenance	Template Version No.	2.2
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Removing a Participating Resource Steps:

Step	Owner	Action
1.	WEIM Participating SC	Submits a Relinquishing SC letter to end date resource ID association with SCID. Via the CIDI case Example: End date 6/1/2021 23:59:59
2.	Resource Owner	Submits a Resource Owner Letter to end date resource ID association with SCID. Via the same CIDI case in step 1 Example: End date 6/1/2021 23:59:59 Start Date: N/A
3.	Resource Owner	The WEIM Participating Resource Owner should send an email to RegulatoryContracts@caiso.com , to request the Schedule 1 of the Participating Resource Agreement - Please cc: SCRequests@caiso.com and RDT@caiso.com .
4.	ISO Regulatory Contracts	The ISO Regulatory Contracts group sends the WEIM Participating Resource Owner the Schedule 1 to redline.
5.	WEIM Participating Resource Owner	The WEIM Participating Resource Owner emails the updated/redlined Schedule 1 removing the resource back to RegulatoryContracts@caiso.com . Please cc: SCRequests@caiso.com and RDT@caiso.com .
6.	ISO Regulatory Contracts	Regulatory Contracts updates the Schedule 1 and sends out the notification to the WEIM Participating Resource Owner.
7.	ISO SC Requests Group	The ISO SC Requests group approves the resource end date based on the submission of the Schedule 1 and the end date letters
8.	ISO SC Request Group	The Resource End Date change request is processed. Notification of the completed change request is sent to all parties via CIDI ticket notification.

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6. Additional Information and Resources

For Participating Resources

The setup of the fuel region and the Major Maintenance Adder (MMA) are separate from this process.

Refer to the Market Instruments Business Practice Manual (BPM) for Fuel Regions and MMA information. The BPM Library is found at: <https://bpmcm.caiso.com/Pages/BPMLibrary.aspx>

- **Requesting Fuel Region – Attachment C**
Scheduling Coordinators for WEIM Participating Resources can submit a request through the CIDI system to change the fuel region associated for the resource using the subject “Assign resource to fuel region”.
- **Requesting MMA – Attachment L**
The template should be submitted as an attachment to a CIDI ticket with Case Record Type “Negotiated Rate Application” and Application Type “MMA”.

Resource modeling information for both non-participating and participating

- If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and the WEIM Entity
- The resource has a project code for submittal of SQMD and SLD
- Project Details form - <http://www.caiso.com/Documents/ProjectDetailsForm.docx>
- Select Project Type - SC Metered Entity
- SQMD and SLD have been accepted by the ISO
 - 5750 Settlement Quality Meter Data (SQMD) Plan
 - Submission and Approval Process- <http://www.caiso.com/Documents/5750.pdf>
 - SQMD Plan Template tutorial - <http://www.caiso.com/Documents/SQMDResourceTemplateTutorial.pdf>
- SQMD Plan Template - <http://www.caiso.com/Documents/SQMDPlanTemplate.docx>
- Checklist – Single and Three Line Drawing (SLD) Requirements - <http://www.caiso.com/Documents/Checklist-MeteringAndRIGDrawingRequirements.pdf>
- WEIM GRDT
<http://www.caiso.com/Documents/EnergyImbalanceMarketGeneratorResourceDataTemplate.xls>