



Coordinated Transaction Scheduling

Reliability Committee review of changes to ISO-NE/NYISO Coordination Agreement for the anticipated 2015 implementation of Coordinated Transaction Scheduling with NYISO

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Agenda

- Background
- Coordination Agreement Changes
- Next Steps



Background - References

- *Coordinated Transaction Scheduling (CTS)* core changes:
 - Result of joint New York and New England stakeholder process
 - Filed February 24, 2012 ([ER12-1155-000](#))
 - Accepted by the FERC April 19, 2012
- Design options leading to the filing are described in:
 - ISO-NE and NYISO White Paper on [Inter-Regional Interchange Scheduling: Analysis and Options](#)
 - [Design Basis Document](#) for NY/NE Inter-Regional Interchange Scheduling (IRIS)



Coordination Agreement Changes - Drivers

- CTS is currently scheduled for implementation in Q4 2015
- CTS implementation details (MR-1, OATT, Coordination Agreement) are being discussed at the various stakeholder committees
- Conforming Coordination Agreement revisions are required to:
 - Implement and administer the Coordinated Transaction Scheduling provisions under ER12-1155
 - As filed by ISO-NE and NEPOOL, and
 - As accepted by the FERC
 - Facilitate the coordinated, reliable operation of the New York-New England interfaces and the interconnected systems by incorporating interrelated CTS criteria within a common document that the Parties execute and file with the FERC

Coordination Agreement Changes - Summary

- Revisions affect all sections of the Coordination Agreement Between ISO New England Inc. and the New York Independent System Operator, Inc.
 - Revisions:
 - Main body (Articles 1-22)
 - Schedule A, Schedule B and Schedule C
 - Addition of a new Schedule D - CTS
 - Discussed in a separate presentation

Coordination Agreement Changes, cont

- Article 1 -Definitions
 - Add/revise definitions to reflect new Schedule D – CTS terms
- Section 2.2 of Article 2 - Scope of Agreement
 - Recognize the structure and framework for:
 - Administering CTS , and
 - Implementing other arrangements for the coordination of the two systems (e.g., Operating Instructions)
- Section 4.10 of Article 4 - Interconnected Operation
 - As Article 6 contains an in-depth discussion on the exchange of information and confidentiality, revise the “confidentiality/ISO-NE Information Policy/NYISO Code of Conduct” language to simply point to Article 6

Coordination Agreement Changes, cont

- Article 6 - Exchange of Information and Confidentiality
 - Streamline language related to data exchange, Confidential Information and CEII treatment
 - Add CTS data exchange references
 - Clarify that alternate data exchange contacts are to be available 24/7
 - Clarify Confidential Information and Critical Energy Infrastructure Information treatment to ensure that the protections afforded under the Coordination Agreement are consistent with the protections under the ISO-NE Information Policy
 - Add “transfer of 3rd-party intellectual property” protections to state that such transfers should not occur and, if they do occur, what steps shall be taken
- Article 7 - Coordination Committee
 - General cleanup

Coordination Agreement Changes, cont

- Article 9 - Operational Information
 - Delete Section 9.2, as it is already covered under Article 6
- Article 11 - Joint Checkout Procedures
 - Added a description of the current day-ahead and real-time checkout processes, which facilitates the verification of net interchange totals and individual transaction schedules
- Article 12 - Coordinated Transaction Scheduling
 - Added a pointer to the new Schedule D – CTS
- Article 13.0: Liability
 - Add language that the liability provisions do not limit the amounts required to be paid for Emergency Energy
 - General cleanup

Coordination Agreement Changes, cont

- Article 19 - Dispute Resolution
 - Clarify the dispute resolution process by allowing for use of FERC Dispute Resolution Service mediation
- Article 22 - Miscellaneous
 - Add a notification process between the Parties to communicate a potential violation self-report by a Party
 - General cleanup
- Schedule A - Description of Interconnection Facilities
 - Recognize E205W Intertie substation rename
- Schedule B - Procedures for Development and Authorization of Operating Instructions
 - General cleanup

Coordination Agreement Changes, cont

- Article 6 of Schedule C - Emergency Energy Transactions Schedule
 - Align the invoicing and payment provisions with current billing practices
 - Require the prompt development of an Pool-to-Pool EE invoice (rather than at the turn of the month)
 - Require payment within 5 days following the receipt of the Pool-to-Pool EE invoice
- Schedule D - CTS
 - Add a new Schedule covering the CTS details that describe the interrelated CTS criteria within a common document that the Parties execute and file with the FERC
 - Discussed in a separate presentation

Next Steps

The table below shows the expected path of the various documents at the ISO-NE stakeholder committees

Document	Market Rule 1	Section II of OATT	Coordination Agreement	Coord Agrmnt Schedule D
Committees	Markets	Transmission	Reliability	Both RC and MC
February	Overview (2/11/2015)			
March		Overview	Overview	Overview
April	Proposal and review Tariff	Proposal and review Tariff	Proposal and review of Coordination Agreement	Proposal and review of Schedule D
May			Review of Coordination Agreement	Review of Schedule D

Technical Committee votes expected no later than June