
Business Practice Manual for Candidate CRR Holder Registration

Version ~~87~~

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7	12/16/2020	1301	Updating minor formatting, links and CRR application fee
6	2/26/20	1231	Update to CRR Application and corrected formatting
5	10/4/17	1001	Update terminology and URLs and provide minor language edits and adding option for pdf application and wire of registration fee
4	04-04-2014	728	Updated to correct broken links, update for EFT form and added more information for FERC Order 741 in addition to new AIM system
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1. Introduction

In this Introduction you will find the following information:

- The purpose of CAISO BPMs
- What you can expect from this CAISO BPM
- Other CAISO BPMs or documents that provide related or additional information

1.1 Purpose of California ISO Business Practice Manuals

The Business Practice Manuals (BPMs) developed by CAISO are intended to contain implementation detail, consistent with and supported by the CAISO Tariff, including: instructions, rules, procedures, examples, and guidelines for the administration, operation, planning, and accounting requirements of CAISO and the markets. Each Business Practice Manual is posted in the BPM Library at: <http://bpmcm.caiso.com/Pages/BPMLibrary.aspx>. Updates to all BPMs are managed in accordance with the change management procedures included in the [Business Practice Manual for BPM Change Management](#).

1.2 Purpose of this Business Practice Manual

The *BPM for Candidate CRR Holder Registration* covers the process that an applicant must complete in order to become a Candidate CRR Holder eligible to participate in the CAISO CRR Allocation, CRR Auction or Secondary Registration System.

In this BPM you will find:

- A description of the application & certification process for a Candidate CRR Holder.
- A listing of obligations & responsibilities for a Candidate CRR Holder.
- General information of use to a Candidate CRR Holder.

The provisions of this BPM are intended to be consistent with the CAISO Tariff. If the provisions of this BPM nevertheless conflict with the CAISO Tariff, the CAISO is bound to operate in accordance with the CAISO Tariff. Any provision of the CAISO Tariff that may have been summarized or repeated in this BPM is only to aid understanding. Even though every effort will be made by CAISO to update the information contained in this BPM and to notify Market



Participants of changes, it is the responsibility of each Market Participant to ensure that he or she is using the most recent version of this BPM and to comply with all applicable provision of the CAISO Tariff.

A reference in this BPM to the CAISO Tariff, a given agreement, any other BPM or instrument, is intended to refer to the CAISO Tariff, that agreement, BPM or instrument as modified, amended, supplemented or restated.

The captions and headings in this BPM are intended solely to facilitate reference and not to have any bearing on the meaning of any of the terms and conditions of this BPM.

1.3 References

Note to Reader: The definition of acronyms and words beginning with capitalized letters are provided in the *BPM for Definitions & Acronyms*.

In addition to the CAISO FERC Electric Tariff and other CAISO BPMs, the following references are related to this BPM:

- Other CAISO BPMs
- CAISO [FERC Electric Tariff](#), Amended and Restated Second Replacement
- CAISO Credit Policy & Procedures Guide

Current versions of these documents are posted on the CAISO Website.

2. Candidate CRR Holder Registration Process

In this section you will find the following information:

- A high-level timeline for the Candidate CRR Holder registration process.
- How to apply to become a Candidate CRR Holder.
- What registration requirements the Candidate CRR Holder applicant must fulfill to become a Candidate CRR Holder.

2.1 Application Timeline

At least sixty (60) calendar days prior to the proposed commencement of the CRR Allocation or CRR Auction, or the effective date of the CRR Transfer through the Secondary Registration System, the Candidate CRR Holder applicant must submit a completed application form to the CAISO. (CAISO Tariff § 4.10.1.3)

Within three (3) Business Days of receiving the application (including the Information Request Form in Attachment B), CAISO sends a written notification to the Candidate CRR Holder applicant stating that it has received the application. (CAISO Tariff § 4.10.1.3) The CAISO assigns to each applicant a Customer Services Client Representative, who assists the applicant throughout the certification process.

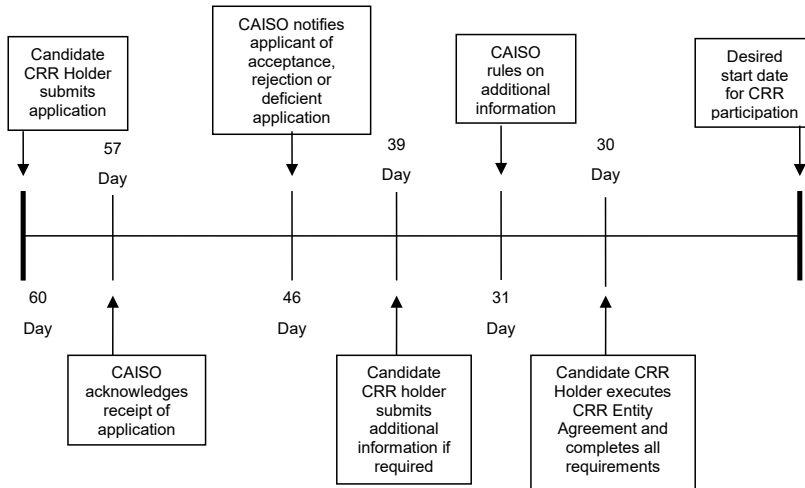
Within ten (10) Business Days after receiving an application, the CAISO notifies the Candidate CRR Holder applicant if the submittal includes all of the necessary information that is required by CAISO. (CAISO Tariff § 4.10.1.4) If the application is deemed to be deficient, the CAISO sends written notification of the deficiency to the Candidate CRR Holder applicant explaining the deficiency and requesting additional clarifying information. (CAISO Tariff § 4.10.1.6) The Candidate CRR Holder applicant has five (5) days (or longer if the CAISO agrees) to provide the additional material that is requested. (CAISO Tariff § 4.10.16.1) If the Candidate CRR Holder applicant does not submit the additional information that was requested by the CAISO within five (5) Business Days (or a longer agreed upon period) then the application may be rejected by the CAISO. (CAISO Tariff § 4.10.1.6.2)

The CAISO makes a decision whether to accept or reject an application within ten (10) Business Days of receipt of the complete application (including any additional or clarifying material that may have been requested). (CAISO Tariff § 4.10.1.7.2)

If the application is accepted, then all certification requirements and applicable contracts must be executed by the applicant and returned to the CAISO within approximately thirty (30)

calendar days prior to the commencement of the CRR Allocation, CRR Auction, or the effective date of the CRR transfer through the Secondary Registration System. The timeline for the Candidate CRR Holder application process is shown in graphical form in Exhibit 2-1.

Exhibit 2-1: Candidate CRR Holder Application Timeline



2.1.1 Application Sunset Provision

The Candidate CRR Holder applicant has one (1) calendar year in which to complete and pass the requirements for final approval. If an application is not completed within one (1) calendar year from the initial submittal date, CAISO can close the application. At a later date, if the Candidate CRR Holder applicant wishes to again pursue certification, a new application and fee is required (See CAISO Tariff § 4.10.1.5).

2.2 Submit Candidate CRR Holder Application Form

To commence the Candidate CRR Holder application process, a Candidate CRR Holder applicant must complete and return the Candidate CRR Holder Application Form that is located in Attachment A and the CRR Entity Agreement Information Request Form that is located in Attachment B of this document.

Once the Candidate CRR Holder applicant completes the Candidate CRR Holder Application Form and the CRR Entity Agreement Information Sheet, the Candidate CRR Holder applicant must then:

- 1) Send a signed electronic copy of the application form to SCRequests@caiso.com
- 2) Please wire transfer the \$5,000.00 application fee to:

Bank ABA#: 121000248
Account #: 4122041783
Bank Name: WELLS FARGO BANK
Account Name: CONCENTRATION

~~Note: \$5,000.00 fee is only applicable to new market participants. If entity is currently a certified SC with the ISO, no fee is required.~~

- 3) Otherwise, send a hardcopy of the application form, including the \$5,000.00 non-refundable application fee to:

California ISO
Customer Service and Stakeholder Affairs
ATTN: Congestion Revenue Rights Application Processing Office
250 Outcropping Way
Folsom, CA 95630

Please make check or money order payable to: The California Independent System Operator Corporation

An application is considered submitted once the completed application and fee are received by the CAISO.

If there are any questions regarding the application or certification process, please contact CAISO at SCRequests@caiso.com.

2.3 Certification Requirements

The Candidate CRR Holder applicant's Client Representative contacts the Candidate CRR Holder applicant to begin the certification requirements once the application has been accepted. This section outlines the certification requirements that a Candidate CRR Holder applicant needs to fulfill to become certified to participate in the CRR Processes.

2.3.1 FERC Order 741

2.3.1.1 Establish CAISO minimum participation requirement

In order to participate in the CAISO Markets, each prospective Market Participant must satisfy all the minimum participation requirements set out in FERC Order 741 and are subject to the credit policy as documented in Section 12 of the CAISO Tariff.

The CAISO recommends that an CRR Applicant understand the minimum participation requirements prior to submitting the Congestion Revenue Rights application, to ensure the requirement can be completed in a reasonable timeframe. Estimated time to complete this process is approximately ten (10) Business Days.

Most entities will satisfy these requirements if they can attest to one or more of the following:

- A net worth of \$1 million;
- Total assets of \$10 million; or
- Credit support in the form of a guaranty or Letter of Credit from another entity that qualifies as an "appropriate person".

2.3.1.2 Officer Certification and Risk Policies

An officer of each prospective and existing Market Participant with a direct financial relationship with the CAISO shall complete and provide to the CAISO, on an annual basis, an executed certified statement that follows the standardized format of the Officer Certification Form available on the CAISO's website. The initial Officer Certification Form must be submitted to the ISO during the Candidate CRR Holder registration process for the prospective or existing Market Participant, as applicable.

Risk Management Policies, Procedures and Controls Applicable to CRR Trading Activities

Each prospective or existing Market Participant that is a CRR Holder or a Candidate CRR Holder is also required to provide additional summary information and attestations relating to their risk

management policies, procedures and controls as set forth in the Officer Certification Form. Each prospective or existing Market Participant that is a CRR Holder or a Candidate CRR Holder and that meets the net portfolio value criterion contained in the Officer Certification Form is additionally required to submit to the CAISO, at the time it submits its Officer Certification Form, a copy of its current governing risk management policies, procedures and controls applicable to its CRR trading activities.

All CAISO Credit Requirements can be found in the BPM for Credit Management. Refer to that specific BPM for further details.

2.3.2 Establish CAISO Portal Access

This requirement enables the Candidate CRR Holder applicant to have access to the CAISO CRR Allocation, CRR Auction and Secondary Registration System (CRR Processes). These applications are only accessed through the CAISO portal via the internet. If the internet carrier selected by a Candidate CRR Holder has an availability issue, it may affect the Candidate CRR Holder's ability to communicate with CAISO. Additionally, industry related news and links, and some content that is available on the CAISO website is also available through the portal. The process in which a Candidate CRR Holder gains access to the CAISO portal is described in Section 2.3.4 of this document.

2.3.3 User Access Administrator (UAA)

At a minimum, a primary and secondary User Access Administrator (UAA) must be established for each entity doing business with the CAISO. This allows the CAISO to continue communications with an entity regarding user access requests when one UAA is not available. The establishment of UAA must be made by an individual at the external entity that has an appropriate level of authority to designate points of contact. For Candidate CRR Holders, a UAA must be identified in the initial CRR registration process established with CAISO's Customer Services department. Any business changes that impact the scope, areas of responsibility, or individuals assigned as points of contact must be communicated to CAISO by one of the points of contact or another authorized company representative. The UAA will have access to the Access and Identity Management (AIM) tool once the entity has an effective ID in the master file. At that time the UAA is authorized to request access for users.

[Application Access](#)

2.3.4 Request Application Access

The designated UAA for the CRR Applicant will request access for the appropriate users through the Access and Identify Management (AIM) tool once the CRR applicant is fully registered with an effective date in the master file. For any system not provisioned through AIM, an Application Access Request Form (AARF) will need to be submitted.

All Candidate CRR Holder applicants should request application access to:

- Market Results Interface - Settlements (MRI-S) and,
- CRR Processes (CRR Allocation, CRR Auction and Secondary Registration System)
- Customer Inquiries and Settlements Dispute Interface (CIDI)

The estimated time to for a Candidate CRR Holder users to receive digital certificates is approximately six (6) Business Days. Additional information can be obtained at on the [Application Access](#) page on the CAISO website.

2.3.5 CRR Training

The Candidate CRR Holder applicant is required to complete CRR computer based training (CBT), which consists of:

- Congestion Revenue Rights Overview - CBT

- Congestion Revenue Rights MUI and SRS Overview – CBT
- Congestion Revenue Rights MUI Training – Allocation and/or
- Congestion Revenue Rights MUI Training – Auction

Entities that are considering application should access the training schedule so that they can obtain necessary training before they intend to operate. All training requirements must be completed before the Candidate CRR Holder applicant is registered and qualified as a Candidate CRR Holder. (See CAISO Tariff § 4.10.1.9.1)

Additional information from previous training courses can be obtained at:

[Training Material](#)

Candidate CRR Holders that have at least one person employed that has completed prior CRR training with the CAISO validate at least one person in their employ that submit the name of the person to be validated as the trained participant.

2.3.6 Electronic Funds Transfer (EFT) Test

This requirement ensures that a Candidate CRR Holder applicant can submit payments to, and receive payment from CAISO. The Candidate CRR Holder applicant is required to test its EFT functionality. The California ISO allows the use of the ACH payment services in addition to the Fed Wire payment system for all market transactions including settlement of invoices and collateral prepayments. Accordingly, market participants should select their preferred method of receiving payments **from** and remitting payments **to** the CAISO by completing the applicable sections of the Electronic Funds Transfer (EFT) form.

The EFT form needs to be completed by all CRR applicants:

[EFT Procedure: http://www.caiso.com/Documents/ElectronicFundsTransferProcedure.pdf](http://www.caiso.com/Documents/ElectronicFundsTransferProcedure.pdf)

[EFT Form: http://www.caiso.com/Documents/ElectronicFundsTransfer-BankAccountChangeForm.pdf](http://www.caiso.com/Documents/ElectronicFundsTransfer-BankAccountChangeForm.pdf)

2.3.7 Affiliate Registration Requirement

All entities participating in the CRR Processes must be fully registered and qualified as a Candidate CRR Holder with the CAISO and must notify the CAISO of all affiliates of the Candidate CRR Holder or CRR Holder, that are themselves Candidate CRR Holders, CRR Holders or Market Participants, any Affiliate that participates in an organized electricity market in North America, and any guarantor of any such Affiliate. (See CAISO Tariff § 36.7.3 and §39.9)

This is an on-going requirement for as long as the CRR Holder owns CRRs. A CRR Holder must notify the CAISO within five (5) business days of an Affiliate relationship change.

For more specific details, please refer to Section 36.7.3 and 39.9 of the CAISO Tariff. The CRR Holder/Affiliate Form can be found at the following URL:

[CRR Registration Forms](#)

2.3.8 Execute CRR Entity Agreement

The CRR Entity Agreement (CCREA) must be executed prior to becoming a Candidate CRR Holder. (See CAISO Tariff § 4.10.1.9.1) Based on the information provided in Attachment B, CAISO will generate a CRR Entity Agreement and send it to the Candidate CRR Holder applicant. A sample of the Pro forma agreement can be obtained on the CAISO website.

2.4 Tariff - Current Tariff Appendices (Rejection)

Procedures associated with rejection of an application and grounds for rejection of an application are specified in CAISO Tariff Section 4.10.1.7.1

2.5 Other Processes

There are other processes that affect a Candidate CRR Holder as described in the following section.

2.5.1 CRR Participation

Candidate CRR Holder's that wish to participate in the CRR Processes need to review the information provided in the *BPM for Congestion Revenue Rights*.

Please Note: This BPM covers only the registration process for Candidate CRR Holders; it does not detail the steps necessary to participate in the CRR Processes (CRR Allocation, CRR Auction and/or Secondary Registration System).

2.5.2 CRR Full Network Model

Market Participants and non-Market Participants may request access to the CRR FNM by meeting the criteria and following the process set forth in Tariff Section 6.5.1.4. In order to gain access to the CRR FNM, each Market Participant and non-Market Participant will need to execute a Non-Disclosure Agreement with the CAISO and may be required to provide other information as described in that tariff provision. Upon receiving the supporting documentation for the request, the CAISO will notify the requesting party whether the requirements in Tariff Section 6.5.1.4 have been met. If access is approved, then the CAISO will provide instructions on how to access the CRR FNM.

3. Maintaining Candidate CRR Holder Status Obligations & Operations

Welcome to the *Maintaining Candidate CRR Holder Status Obligations & Operations* section of the *BPM for Candidate CRR Holder Registration*. In this section you will find the following information:

- The ongoing obligations for an Candidate CRR Holder
- The termination procedure for Candidate CRR Holder status

3.1 Ongoing Obligations

Each Candidate CRR Holder and CRR Holder has an ongoing obligation to inform the CAISO of any changes to any of the information that it has submitted to the CAISO as part of the application process. (See CAISO Tariff § 4.10.2.1.1) Such changes must be reported to the CAISO within seven (7) Business Days of the change unless it is a Material Change in Financial Condition. Any Material Change in Financial Condition must be reported within five (5) Business Days. (See CAISO Tariff § 4.10.2.1.2)

3.1.1 Failure to Inform

If a Candidate CRR Holder fails to inform the CAISO of a material change in the information, including but not limited to Material Change in Financial Condition, that it has supplied to the CAISO and the information in question may affect the Financial Security of the CAISO, then the CAISO may suspend or terminate the Candidate CRR Holder or CRR Holder's rights under the CAISO Tariff in accordance with the CAISO Tariff sections 12.3 and 4.10.4.2.

If the CAISO intends to terminate a Candidate CRR Holder or CRR Holder's status, then it must file a notice of termination with FERC and such termination is only effective upon acceptance of the notice of termination by FERC.

3.1.2 Training & Testing

Candidate CRR Holders and CRR Holders are required to maintain continued proficiency and compliance with the rules and regulations concerning participation in the CAISO CRR Processes.

New employees are expected to complete CRR computer based training (CBT) that is mentioned in section 2.3.5.as soon as practical given their other duties.

If a Candidate CRR Holder becomes 'inactive' in the CAISO CRR Processes for a period greater than two (2) years, they are expected to complete the CRR training program again.

Attachment A

CANDIDATE CRR HOLDER APPLICATION FORM

A. Candidate CRR Holder Application Form

This application is for certification of the applicant as a Candidate CRR Holder by the California Independent System Operator Corporation (“CAISO”) in accordance with the CAISO Tariff. The information provided for this application will be treated as confidential information.

3.2 Section I: Administrative Requirements			
Applicant's Legal Name <i>Note: This company name must be used on all documentation submitted to the CAISO. Use of an inconsistent name may result in the document being returned to you for correction thus delaying the registration process.</i>			
Street Address			
City, State, Zip Code	City:	State:	Zip Code:
State of Incorporation or Partnership (if applicable)			
Proposed Commencement Date for Service			
Entity Type (Municipal utility, power marketer, investor owned utility, federal or state entity or other)			
Is your company a registered certified Scheduling Coordinator with the CAISO?	<input type="checkbox"/> Yes If Yes, Please provide your SCID(s): _____ <input type="checkbox"/> No		
If your company is NOT registered as a certified Scheduling Coordinator, please complete this section Scheduling Coordinator ID (SCID) <i>Provide three options for your SCID. The SCID has to start with a letter and must be four characters. The SCID is a unique identifier used throughout the CAISO Market systems. The CRRH applicant is granted one SCID with its application.</i>	First Choice:	Second Choice:	Third Choice:
Select the CRR Markets your company wishes to participate in:	<input type="checkbox"/> CRR Allocation Enter LSE/ESP/CCA: _____ DUNS# _____ <input type="checkbox"/> CRR Auction <input type="checkbox"/> CRR Secondary Registration System (SRS)		
Has someone from your company completed the CAISO CRR Training Course?	<input type="checkbox"/> Yes If Yes, Please provide full name: _____ Dates Training completed: _____ <input type="checkbox"/> No		

Section I: Administrative Requirements

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<p>Applicant's Legal Name <i>Note: This company name must be used on all documentation submitted to the CAISO. Use of an inconsistent name may result in the document being returned to you for correction thus delaying the registration process.</i></p>			
<p>Street Address</p>			
<p>City, State, Zip Code</p>		<p>City: _____</p>	<p>State: _____</p>
<p>State of Incorporation or Partnership (if applicable)</p>			
<p>Proposed Commencement Date for Service</p>			
<p>Entity Type (Municipal utility, power marketer, investor owned utility, federal or state entity or other)</p>			
<p>Is your company a registered certified Scheduling Coordinator with the CAISO?</p>		<p><input type="checkbox"/> Yes - If Yes, Please provide your SCID(s): _____ <input type="checkbox"/> No</p>	
<p>If your company is NOT registered as a certified Scheduling Coordinator, please complete this section</p>		<p>Scheduling Coordinator ID (SCID) <i>Provide three options for your SCID. The SCID has to start with a letter and must be four characters. The SCID is a unique identifier used throughout the CAISO Market systems. The CRRH applicant is granted one SCID with its application.</i></p>	
		<p>First Choice: _____</p>	<p>Second Choice: _____</p>
		<p>Third Choice: _____</p>	
<p>Select the CRR Markets your company wishes to participate in:</p>		<p><input type="checkbox"/> CRR Allocation — Enter LSE/ESP/CCA: _____ DUNS# _____ <input type="checkbox"/> CRR Auction <input type="checkbox"/> CRR Secondary Registration System (SRS)</p>	
<p>Has someone from your company completed the CAISO CRR Training Course?</p>		<p><input type="checkbox"/> Yes - If Yes, Please provide full name: _____ Dates Training completed: _____ <input type="checkbox"/> No</p>	

Section II: CRR Registration Process Contact Information

Authorized Primary Customer Services Contact (works with CAISO during/after the Candidate CRR Holder certification process)

Name			
Title			
Email Address			
Desk Phone Number			
Mobile Phone Number (optional)			
Fax Number			
Street Address <i>If different than the one listed under Section I-Administrative Requirements.</i>			
City, State, Zip Code	City:	State:	Zip Code:

Authorized Alternate Customer Services Contact (alternate person that can provide backup responsibilities if the CAISO is unable to contact the primary contact)

Name			
Title			
Email Address			
Desk Phone Number			
Mobile Phone Number (optional)			
Fax Number			
Street Address <i>If different than the one listed under Section I-Administrative Requirements.</i>			
City, State, Zip Code	City:	State:	Zip Code:

Section III: Signatory Page

The undersigned hereby represents and confirms that all information submitted herein is true and accurate to the best of his/her knowledge.

The undersigned hereby acknowledges that it is the responsibility of the undersigned to provide the CAISO with all confidential and/or proprietary information that is reasonably needed to determine the CRRH applicant's eligibility to become a CRRH.

The undersigned further hereby acknowledges that: (i) it is the responsibility of the undersigned to inform the CAISO of any change to any of the information submitted in this Candidate CRR Holder Application Form immediately upon learning of any such change; (ii) that this responsibility will continue to apply even after the Applicant becomes a certified CRRH; (iii) CAISO reserves the right to reevaluate the applicant in light of the new information; and that (iv) an CRRH applicant's failure to promptly notify the CAISO of a change in information may result in termination of the CRRH Application Process or revocation of CRRH Applicant.

Signatory Block	
Company Name:	
Authorized Representative Signature:	
Authorized Representative Name:	
Authorized Representative Title:	

Email a signed PDF copy of the CRR application to SCRequests@caiso.com and send the \$5,000.00 application fee via wire to:

Bank ABA#: 121000248
 Account #: 4122041783
 Bank Name: WELLS FARGO BANK
 Account Name: CONCENTRATION

Otherwise, send a hardcopy of the applicable applicant forms with the Signatory Page and \$5,000.00 registration fee to:

CAISO Customer Service and Stakeholder Affairs
 ATTN: CRR Application Processing Office
 250 Outcropping Way
 Folsom, CA 95630

Attachment B

**CRR ENTITY AGREEMENT
INFORMATION REQUEST SHEET**

B. CRR Entity Agreement Information Request Sheet

To initiate a CRR Entity Agreement (CRREA), please fill in the information requested below and email this form with the completed Candidate CRR Holder Application to SCRequests@caiso.com.

All information must be complete before the execution version of the agreement can be prepared.

Full legal name of company	(Please verify legal spelling of name including capitalization and punctuation)
Legal street address of company	
City/State/Zip code	
Name of primary representative	
Title	
Company	
Street address	(Street address is required with a P.O. Box only as additional information)
City/State/Zip code	
Email address	
Phone	
Fax	
Name of alternative representative	
Title	
Company	
Street address	(Street address is required with a P.O. Box only as additional information)
City/State/Zip code	
Email address	
Phone	
Fax	

REQUIRED FOR ELECTRONIC SIGNATURE PROCESS:

Name of signatory	
Email address	