* Ancillary Services Bids
* RUC Availability Bids
* Self-Schedules
* Ancillary Services self-provision
* Virtual Energy Bids (Virtual Supply, and Virtual Demand)

Further details are given in the *BPM for Market Instruments*, Sections 5, 6 and 7

### Interchange Transactions & E-Tagging

Consistent with NERC standards, SCs should submit E-Tags for DAM Schedules, which are due in DAM scheduling timeline, consistent with the WECC business practice and NERC standards.

The following types of DAM interchange transactions at Scheduling Points must be E-Tagged:

* Ancillary Services Bids – For the capacity E-Tag, the Energy profile equals zero. However, the transmission allocation profile is equal to the awarded Bid. If the Ancillary Services capacity is converted to Energy, the tag’s Energy profile is adjusted to the dispatched quantity.
* Supply and Demand Bids and Self-Schedules
* Consistent with WECC Regional Criterion, for CAISO Day Ahead awards of market priority type DALPT or DAECON for which the CAISO is responsible for the contingency reserves, the corresponding E-Tag Energy Product Type shall equal Firm Provisional (G-FP[[1]](#footnote-1)[1]).  This properly communicates to the sink BA that if in the event of a contingency to recover contingency reserves or in the event the CAISO is reducing these awards in HASP due to scheduling priorities in the CAISO BA, the E-Tag may be subject to adjustment based on the HASP award, or curtailment based on need following a contingency or resource deficiency in the CAISO when the CAISO is operating in an EEA condition. In addition, the MISC field shall include the relevant

market priority type DAPT, DALPT, DAECON, RTPT, RTLPT, RTECON...).

* **Provisions for G-FP Use In E-Tag Market Path “Product” field:**
* To restore contingency reserves following a contingency and deployment of existing contingency resources, in the case where the re-procurement of contingency reserves is deficient.
* In an EEA3 condition, where armed load is utilized to restore deficient contingency reserves in conjunction with E-Tag curtailments, in order to maintain required contingency reserves. In addition, curtailment of lower priority exports may be utilized to replace armed load..
* TOR, ETC and CVR Self-Schedules
* RUC capacity is not tagged. Energy associated with a RUC Schedule dispatched on at an Intertie is to be tagged as Energy and not capacity consistent with the NERC standards.

To enable CAISO to match and validate the E-Tags with the corresponding market reservations, the following market information must be included on each E-Tag in the Misc. Information field of the Physical Path:

* Energy Type: ENGY,SPIN or NSPN
* Transmission Right Identifier, i.e., Contract Reference Number (CRN), applicable to ETC/TOR/CVR self-schedules.
* Resource ID/ Transaction ID
* Market Priority Type (DAPT, DALPT, DAECON, RTPT, RTLPT, RTECON...)

In addition, Scheduling coordinators shall be required to enter in the E-Tag Market Path G-FP (Generation-Firm Provisional) in “Product” field for all CAISO low Market Priority Types (i.e DALPT, DAECON, RTLPT, RTECON)

**Notes**

An export resource ID can be associated with more than one market priority types with a MW corresponding to each market priority type. However, only one E-Tag can be used per Market Priority Type.

## [SECTION 8.3] E-Tag Tools

The Western Interchange Tool (WIT) or successor electronic confirmation tool serves as the E-Tag authority in the WECC. The WIT is treated as the final record of Net Scheduled Interchange (NSI) and Net Actual Interchange (NAI) under normal operating conditions. In accordance with NERC standards, WIT receives requests for interchange (RFIs) via E-Tags from various entities and distributes these requests to reliability entities (balancing authorities and transmission service providers) and market entities for reliability and market assessments. WIT also confirms requests for interchange based on criteria set forth in NERC and WECC standards.

The ISO validates interchange transactions and confirms them with adjacent balancing authorities prior to implementing them as scheduled interchange. Additionally, the ISO assesses interchange transactions for reliability purposes, adequacy of transmission rights, and ensures market awards are not exceeded prior to E-Tag implementation. The ISO uses the interchange transaction scheduling software to process E-Tags, and when necessary, curtails/adjusts or denies E-Tags that do meet requirements.

The Interchange Transaction Scheduler (ITS) manages interchange transactions, provides Net Scheduled Interchange (NSI) to the ISO’s energy management system (EMS) and real-time market. The ITS also facilitates hourly NSI and Net Actual Interchange (NAI) checkout with adjacent Balancing Authorities (BA). In plain terms, the ITS informs each balancing authority’s systems on the expected net energy transfers across the interties. The individual and aggregate NSIs for each hour is based upon validated E-Tags.

### Tag Adjustments and curtailments

ISO market-automated E-Tag adjustment applies to all E-Tags and is performed based on bid type. The ISO market does not adjust E-Tags when it is not the Transmission Service Provider (TSP) or the Market Operator (MO) on the E-Tag. The ISO notes that E-Tag curtailments are mostly performed during abnormal system conditions that may require operator action to bring the system to a reliable state.

* + - * For hourly block bids, the relevant E-Tags are adjusted down at T-40 when the MW value of the relevant market award from HASP is below the energy profile in the E-Tag.
			* For fifteen-minute bids, the relevant E-Tags are adjusted up or down at T-40 for all four fifteen minutes intervals to match the HASP market advisory awards. And at the publication of each binding fifteen minutes awards, these E-Tags are adjusted again if the binding award for the relevant FMM interval is different from the previously published advisory awards.
				+ System shall determine the 15-minute binding award for hourly intertie resources based on the E-Tag at T-40. The 15-minute market binding award for hourly interties shall equal the lower of the HASP schedule, HASP accepted award (ADS accepted value), or E-Tag transmission profile
				+ For 15-minutes bid opted intertie resources, E-Tag with valid transmission profile is due by T-40.
			* For dynamic bids that are *not* WEIM transfers (ETSRs), the relevant E-Tags are not currently adjusted by the ISO market systems. These E-Tags are adjusted by the PSE or the Scheduling Coordinator within sixty minutes of the end of the relevant hour, consistent with NERC standards.
			* For fifteen minute ETSRs for transactions between the ISO BAA and another WEIM BAA, the relevant E-Tags are adjusted:
				+ Near the top of the hour to match the average of the advisory awards from HASP.
				+ Up or down at T-40 for all four fifteen minutes intervals with the market advisory awards if the advisory is different from the previously published average MW.
				+ At the publication of each binding fifteen minutes award, if the binding award for the relevant FMM interval is different from the previously published advisory awards from HASP.
			* For five minute (dynamic) ETSRs for transactions between the ISO BAA and another WEIM BAA, the relevant E-Tags are adjusted:
				+ Near the top of the hour to match the average of the advisory awards from HASP. These E-Tags are adjusted again by the PSE or the Scheduling Coordinator within sixty minutes of the end of the relevant hour, consistent with NERC standards.
			* E-Tags are also adjusted or curtailed based on CAISO Market Priority Type DAPT, DALPT, DAECON, RTPT, RTLPT, RTECON. Scheduling coordinators are required to enter in the E-Tag Market Path G-FP (Generation-Firm Provisional) in “Product” field for all CAISO low Market Priority Types (i.e DALPT, DAECON, RTLPT, RTECON). In an EEA3 condition, where armed load is utilized to restore deficient contingency reserves, lower priority exports E-Tags curtailments may be used in order to maintain required contingency reserves
* **Notes**
* An export resource ID can be associated with more than one market priority types with a MW corresponding to each market priority type. However, only one E-Tag can be used per Market Priority Type.
1. [1] G-FP: Firm Provisional Energy. This product may be interrupted only if the interruption is within the recall time and for conditions allowed by applicable provisions governing interruption of service, as mutually agreed to by the parties. A G-FP product cannot be interrupted for economic reasons. [↑](#footnote-ref-1)