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Market Renewal Implementation Testing, Training and Participant Readiness

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Today's Purpose

- To provide a high-level overview of the solution development, testing, and training activities during the implementation phase
- To introduce and recruit volunteers to develop a working committee to assist on technical planning

Implementation Phase

Market Rules
and Manuals

Reference Levels
and Reference
Quantities

Solution
Development

Training

Testing and
Market Trials

IESO Readiness

Market Participant
Readiness

Principles for Tools, Testing, and Training

- Leverage current platforms as much as possible to minimize impact on participants
- Use stakeholder insights to consider the impact of a change, and provide time to manage the change
- Continue using the Market Renewal principles to guide this phase of activities

Market Participant Impacts

- Most changes fall upon dispatchable participants
- When reviewing Detailed design documentation:
 - Section 5 highlighted changes to market facing procedures
 - Section 6 described areas of change to external business processes and information flows
 - Appendix A highlighted tools changing through Market Renewal
- Broader education efforts across the sector, including non-participants
- Confirmation of participant readiness

What's Changing in the Renewed Market?

1. Market Participant Business Processes: Data collection and submission
2. New Participation Types: Virtual Transactions and Price-Responsive Loads
3. Tools: Energy Management Interface; Dispatch Workstation; Online IESO;
4. Reports: New data and reporting
5. Settlements: New charge types; Same format

Market Participant Business Processes

- Participants are already collecting information, and reviewing documentation
 - Reference Levels, new Hydroelectric parameters, Pseudo-Unit modelling
- New participation opportunities
- Offer strategy

New Participation Types

- New participation types with Virtual Transactions and Price-Responsive Loads; will require information to registered earlier to be ready for go-live
- Pseudo Unit model will also require a change in registration information
- Full detail on registration requirements will be available for training early in 2023

Tools and IT Changes

- Functional changes to Energy Management Interface, and Dispatch Service will require testing, market trials from all dispatchable participants
- Online IESO and Settlement changes are accommodating additional data into existing processes

Reports

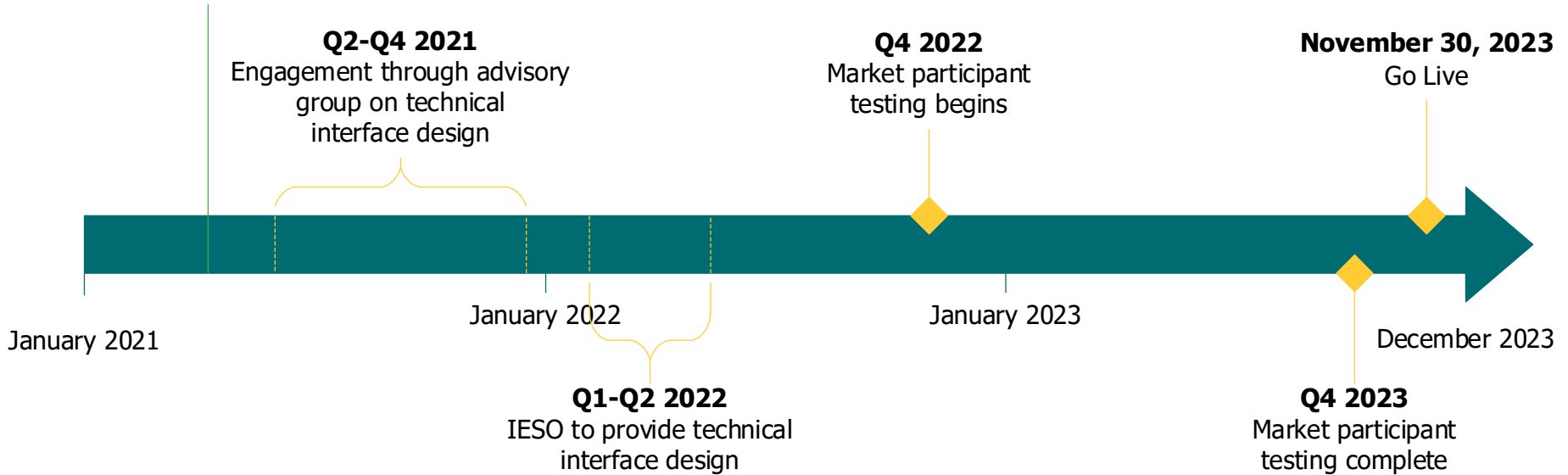
- Significant changes to reports and publishing new data as a result of the renewed market
- Using XML format, and will have schema files available for review
- Training, schemas, and sample files available throughout 2022, with reports available in the Sandbox throughout 2023

Settlement

- Settlement: New Charge Types; Same Format of Statements and Invoices
- Expanded processes for disagreements and expanded Notice of Disagreement (NOD) window
 - Changes within Online IESO workflow
- Timing for Charge Types and Equations documentation: Q4 2022
- Market Participant testing for modifications related to NOD process and recalculated settlement statements in 2022

Timelines

Today



Broader Education Efforts

- To complement the testing and training component, the IESO will also be working on a set of educational products
- To answer stakeholder questions, explain concepts in the new market, and walk through a “Day-in-the-Life’ of market participants

Technical Advisory Group – Request for Volunteers

- Want to engage MPs, and their agents, on further detail on the planning and execution of tool changes
- New body to provide that advice; looking for cross section of customers and technical expertise
- Advise on key issues for implementation: optimal timing for testing and trials; engagement strategy for training and tool testing

Technical Advisory Group – Request for Volunteers

- Interested stakeholders can e-mail engagement@ieso.ca by May 14
 - Please indicate which sector you represent, and key technical skills or relevant background
- First discussion to occur in June; all meeting materials will be posted
- Terms of Reference posted on www.ieso.ca

Next Steps

- **Technical Advisory Group: Volunteers** – engagement@ieso.ca due May 14
- **May Engagement Days: Independent Review Process for Market Power Mitigation**

Thank You

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