



# **SMD2 Readiness**

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**Management Committee**

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# SMD2 Deployment

- **Scheduled Deployment Date of December 1**
- **Detailed Readiness Plan Developed**
  - *Checklists of Major Activities*
  - *Additional Market Trial Exercise Included*

# SMD2 Readiness

- **Testing**
- **Training**
- **Departmental Procedures**
- **Detailed Cut-over Planning**
  - *Fall-back Contingency*
  - *Implementation Requirements*
    - ◆ **Parallel Operations**
    - ◆ **Price Reservations**

# SMD2 Testing Objectives

- **Validate functional operation / performance**
- **Demonstrate integrated Bid-to-Bill capabilities**
- **Ensure Marketplace interfaces are operational**
- **Confirm accuracy of market results**

# Market Trial Exercise Status

## ➤ Market Trial Exercise 6

- *Review results on October 15*

## ➤ Market Trial Exercise 7

- *October 13 and 14*
- *Success driven by full participation of the Marketplace*
- *LECG analysis by end of October*

# Market Readiness

- **Detailed Fall-back Plan**
- **Satisfactory Assessment of Market Trials/Simulation**
- **Departmental Readiness in the Following Functional Areas:**
  - *Market Operations*
  - *Market Monitoring & Performance*
  - *Power System Operations*
  - *Customer Settlements*
- **Consultation with MPs prior to FERC Notification**
- **LECG/Patton Assessment**
- **Final Signoff**

# Market Operations

- ✓ **Testing - SCUC/ RTS**
  - ✓ *Unit Commitment*
  - ✓ *Network Security Analysis*
  - ✓ *SCUC Multi-Pass Operations*
  - ✓ *Automated Mitigation Procedures*
  - ✓ *Data Interfaces/Processing*
  - ✓ *Special Market Functions*
- ✓ **Procedures**
  - ✓ *DAM Administration Procedures*
  - ✓ *Network Model Maintenance Procedures*
- ✓ **Network Model Database Verification**
  - ✓ *Validation of legacy conversion to SMD*
  - ✓ *Operational review of SMD network model*
- ✓ **State Estimator Commissioning**
- ✓ **DAM/RTM Load Forecaster Operations**
- ✓ **Transmission Outage Reporting**
- ✓ **Special Operations Monitoring Programs**

# Market Monitoring & Performance

## ✓ Testing

- ✓ *Mitigation Functions*
- ✓ *Screening Tools*
- ✓ *SCUC/RTS Market Analysis (Study Mode, Save Case) and Associated Tools*
- ✓ *Price Corrections*

## ✓ Procedures

- ✓ *Market Analysis*
- ✓ *Price Validation*
- ✓ *Market Monitoring*
- ✓ *Mitigation*

## ✓ Training

- ✓ *Running SCUC/RTS*
- ✓ *Extracting data*

## ✓ Data Interfaces

- ✓ *Price Correction Data to and from LECG*
- ✓ *Reference Price Information to and from Potomac*
- ✓ *Data flow between MIS and MM&P Reports*



# Power System Operations

## ✓ Testing

- ✓ *Validate Program Results, such as Contingency Analysis, RTC/RTD/CAM functions, etc.*
- ✓ *Verify Applications: Metering/One-line, Displays, Big Board, Alarms*
- ✓ *Verify Identified Problems Corrected*
- ✓ *Ensure Overall System Performance*

## ✓ Procedures

## ✓ Training

- ✓ *Bid-to-Dispatch Basepoints*
- ✓ *Interaction with MIS and Ranger*
- ✓ *Two Weeks Training on Simulator for each Operator,*
- ✓ *Detailed Cut-Over Plan from SCD to SMD2*

# Customer Settlements

## ✓ **Testing**

- ✓ *Over 100 Scenario Tests to Ensure SMD2 Settlement Rule Logic is Tested*
- ✓ *Testing to Support Re-Design for Legacy Settlements (e.g. Group Unit Logic Changes)*
- ✓ *Market Applications: Consolidated Invoice, Cash & Transmission Service Reconciliations, Data Warehouse, Advisory Settlement Statements*

## ✓ **Procedures**

- ✓ *Audit Processes*

## ✓ **Training**

- ✓ *SMD2 and Legacy Changes*

## ✓ **Audit Tool and Process Checks**

- ✓ *SMD2 and Legacy Changes*

## ✓ **Accounting & Billing Manual**

# Next Steps

## ✦ Committees

- *MSWG*
  - ◆ Finalize Fallback Plans & Criteria for Cut-over Day
  - ◆ Address MP issues list items
  - ◆ Review of LECG Market Trial and Simulation Analysis
- *BAWG*
  - ◆ Finalize Fallback Plans & Criteria for Cut-over Day
  - ◆ Monitor Market Trial Billing Results
  - ◆ Discuss SMD2 Billing Readiness
- *CDAS*
  - ◆ Review ICCP data transfer and accuracy
  - ◆ Review State Estimator output
- *SOAS*
  - ◆ Monitor NYISO / TO Operator training completion
- *MC*
  - ◆ Discussion to review status of overall readiness and intent to “go-live”

## ✦ NYISO

- *Continue NYISO Testing & Training*
- *Departmental Readiness “Sign-off”*
- *Complete Market Trial Exercise 7*
- *Complete LECG Market Trials Analysis*
- *Confirmation from Independent Market Advisor*