

NYISO Procedure for Managing Documents

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NYISO Procedure for Managing Documentation

- ◆ NYISO Policy A-39 integrates development and maintenance of Manuals and Technical Bulletins.
- ◆ Balances the requirement for NYISO Manuals to be the primary source of information for Market Participants with the need for timely distribution of new information via Technical Bulletins.

Overview of Documents

- ◆ NYISO Manuals
 - *A set of approximately twenty-four documents that describe policies and procedures consistent with the NYISO Tariffs and Agreements used to operate the New York Control Area (NYCA) and conduct the New York Wholesale Electricity Market.*
- ◆ Technical Bulletins
 - *A set of approximately 100 (100 is the net of active and retired) documents supplementing NYISO manuals and guides and communicating in detail specific technical information generally relating to NYISO processes, procedures, and software.*

Document Revisions per NYISO Procedure

- ◆ At least once every two years:
 - *All NYISO documentation will be “recertified” for accuracy and tariff compliance by the appropriate NYISO departments, including NYISO Legal, absent any “trigger” that would result in a revision sooner than scheduled.*
 - *Revision triggers include, but are not limited to, new FERC rules, NYISO software deployments, operational changes, etc.*
 - *This procedure was initiated in late 2007 and first scheduled August 2008.*

- ◆ Technical Bulletins are subject to market participant comment when released and are incorporated within the appropriate Manual during the latter’s next scheduled recertification period or ad hoc revision, whichever occurs first.

Document Revisions per NYISO Procedure cont'd

- ◆ Changes to Manuals are subject to external review and approval.
- ◆ NYISO is **proposing** to make ministerial changes to manual attachments reviewable through working groups.
- ◆ NYISO is **proposing** to create “attached documents” to manuals.
 - *Attached documents would be reviewed and approved by committees.*

Alignment of TB to Manual

- ◆ Starting in 2009, TB's were "linked" to a respective manual or guide.
- ◆ This was not done before, which may have contributed to TB's not being regularly incorporated into manuals or guides.
- ◆ This linkage is partially responsible for the retirement of 37 TB's in 2009.
- ◆ Note that the bottom of the last page of a TB reflects the linkage.

Technical Bulletin Recertification

- ◆ Technical Bulletins are recertified and revised, similar to manuals.
- ◆ They are to be reviewed for accuracy and revised as needed on a stand-alone basis at least once every two years, in cases where incorporation in to the relevant Manual revision is delayed.

Questions ?



The New York Independent System Operator (NYISO) is a not-for-profit corporation that began operations in 1999. The NYISO operates New York's bulk electricity grid, administers the state's wholesale electricity markets, and provides comprehensive reliability planning for the state's bulk electricity system.

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