
	© ISO New England Inc. 2024	Procedure: Coordinate Operations Change Impact Assessment and Integration
	Process Name: Perform Operations Administrative Tasks	
	Procedure Number: RTMKTS.0125.0120	Revision Number: 2.1
	Procedure Owner: Manager, Operations Analysis and Integration	Effective Date: May 1, 2024
	Approved By: Director, Operational Performance, Training and Integration	Review Due Date: May 1, 2026

SOP-RTMKTS.0125.0120 - Coordinate Operations Change Impact Assessment and Integration

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1. Objective

1. The objective of this procedure is to define the Operations Change Impact Assessment and Integration (OCIA) process by which ISO New England (ISO) Operational Performance, Training, and Integration (OPTI) staff, including Operations Analysis and Integration (OAI) and Operations Training and Procedures (OTP), assess the impact of changes to System Operations & Market Administration and integrate those changes in a consistent manner. System Operations & Market Administration includes the software, tools, procedures, and processes that are necessary for Operations, Operations Support Services (OSS) and Market & Resource Administration (MRA) to perform their duties.
2. The goal of the process is to identify critical tasks and interdependencies with the intent of integrating changes to System Operations & Market Administration in a thorough, consistent manner. Consistent integration of changes will provide a reasonable level of assurance that System Operations & Market Administration maintains a high level of situational awareness that promotes the continued reliable operation of the Bulk Electric System (BES), precise execution of hourly and monthly markets, timely and accurate registration and auditing, and detailed analysis of the BES.
3. A System Operations & Market Administration change can result from any of the following:

NOTE

The below listing is **not** intended to be an all-inclusive list of possibilities.

- Any new or modified external requirement applicable to ISO Operations, such as a change to any North American Electric Reliability Corporation (NERC) or Northeast Power Coordinating Council Inc. (NPCC) requirement.
- Any new or modified internal requirement applicable to ISO Operations, such as a change to the ISO New England Inc. Transmission, Markets, and Services Tariff (Tariff) or any Transmission Operating Agreement (TOA).
- A change to any of the following at ISO:
 - Software used by System Operations & Market Administration
 - Tools used by System Operations & Market Administration
 - Procedure changes
 - Process changes

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- Manual changes
- ISO New England Reliability Coordinator Area (RCA)/Balancing Authority Area (BAA) system/topology
- Transmission system topology

2. Background


2.1 General Information

NOTE

Changes to existing Interconnection Reliability Operating Limits (IROLs) or creation of new IROLs are of critical importance and require additional preparatory measures as noted within this procedure¹.

1. Frequent changes to business processes and software occur that have varying levels of impact on System Operations & Market Administration. This procedure provides guidance for performance of OCIA steps in five distinct phases. These phases are:
 - A. Queued
 - B. Awareness
 - C. Assessment
 - D. Preparation
 - E. Implementation
2. OPTI may be notified of a change based on, but not limited to, the following triggers:
 - Tariff Change Coordination (TCC) meetings
 - Program Management Office (PMO) Project meetings
 - Performance & Risk Management (PRM) Meetings
 - Major New Equipment Checklist meetings
 - NERC Board of Trustee (BOT) Approval meetings


¹ Portions of this OCIA procedure specific to maintaining awareness of new or updated IROLs are in response to a recommendation from a causal analysis report completed in September, 2017. See OPTI Management for details.

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- Notification of submitted Excellence through Quality (EtQ) Corrective Actions/Preventive Actions (CAPAs)/Issues
 - Project meetings
 - Management directives
3. **Queued Phase** The objective is to identify future changes that will impact System Operations & Market Administration but are not currently actively being addressed.
 4. **Awareness Phase** The objective is to obtain and document an initial understanding of the change and its potential impact on System Operations & Market Administration.
 5. **Assessment Phase** The objective is to identify impacts of the change that require significant efforts or coordination prior to the planned effective date/implementation date, and detail those changes in a formal manner when appropriate. Assessment consists of the steps necessary to ensure there is a thorough understanding of the potential impacts of a change. Assessments performed for changes that impact existing IROLs, or create new IROLs, have additional assessment criteria.
 6. **Preparation Phase** The objective is to complete all necessary steps prior to the effective date/implementation date of the change. Preparation consists of the work necessary to ensure that the required software, tools, procedures and processes are in place for a successful implementation. This includes completion of required software testing and creation or revision of Operating Procedures and documents. Additionally, during this phase, prior to implementation, any identified training requirements shall be completed.
 7. **Implementation Phase** The objective is to integrate the change into the impacted systems such as the Real-Time control room operating environment, as well as any follow-up support and analysis performed to ensure that systems, software, tools, procedures, and processes are working as expected.

3. Responsibilities

1. The following responsibility assignment matrix assigns a role for members of OPTI to perform a specific task. The four roles are:
 - A. Responsible (R): Performs the work to complete the task
 - B. Accountable (A): Delegates work and reviews the task before it is complete
 - C. Consulted (C): Provides input on the task
 - D. Informed (I): Kept up-to-date on the task progress

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Task	Director, OPTI	Manager, OAI	Manager, OTP	Supervisor, OAI	OAI Lead	OTP designee
Provide oversight of the OCIA process	A/R	C	C	C		
Ensure that OCIAs are initiated upon becoming aware of an upcoming change that warrants further assessment	I	A		R		
Assign OAI Lead for OCIA		C		A/R	I	
Coordinate with OAI, OTP, and any other necessary staff, to perform an assessment of changes	I	C	C	A	R	R
Review and approve completed phases of the OCIA prior to moving to the next phase		R	R	I	A/R	
Coordinate OCIA review meetings with applicable ISO staff to review open OCIAs	-	R	I	A/R	I	-
Coordinate with the OSS staff and the Power System Modeling Management (PSMM) staff for integration of new or modified IROLs that would not be indicated or alarmed with existing EMS functionality (e.g. routine ILC changes would not require coordination through this process)		C	C	A/R	R	
Assign product tests to OPTI staff members		R		A/R	I	
Verify completion of testing prior to the effective date/implementation date of the change		I		A/R	R	
Collaborate with System Operations & Market Administration Management to determine needs related to follow-up support or analysis of change effectiveness		C	C	A	R	
Close out documentation associated with the OCIA process	I	C	C	A/R	R	R
Coordinate with Procedure Owners to ensure Operating Procedures and documents are updated prior to the effective date of the change			A/R			R
Coordinate with OPTI staff members to ensure training requirements are identified and training is delivered, as necessary, prior to the effective date/implementation date of the change			A/R			R


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2. System Operations Management is responsible for attending periodic OCIA review meetings and informing OPTI of upcoming changes that may impact System Operations.
3. OSS Management is responsible for attending periodic OCIA review meetings to discuss upcoming changes, some of which may have potential IROL impact.
4. PSMM Management is responsible for attending periodic OCIA review meetings to discuss changes related to IROLs or other changes requiring PSMM involvement.
5. MRA Management is responsible for attending periodic OCIA review meetings to discuss upcoming changes that may impact MRA.

4. Controls

1. Biennial review of this SOP shall be performed by the Procedure Owner (or designee).
2. The OCIA process, which includes a status summary and completed or in-progress OCIA Checklists, shall be maintained on the Operations Analysis & Integration space within Confluence.

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5. Instructions

5.1 Queued Phase

1. An OCIA shall be initiated when OPTI Management becomes aware of an upcoming change that warrants further assessment. If the OCIA is not actively being addressed, it will remain in the Queued Phase. An example of this would be an effective market change which is not to be implemented until several years in the future.
2. The Supervisor, OAI or OAI Lead shall document the following items, when available, within the Queued Phase of the OCIA Checklist:
 - A. An initial description of the change.
 - B. The source of the change (e.g. Federal Energy Regulatory Commission (FERC) - filed accepted Docket, TCC Meeting, EtQ CAPA/Issue, Project, etc.).
 - C. Estimated implementation date.

5.2 Awareness Phase

1. An OCIA shall move to the Awareness Phase when work will actively start.
2. The Supervisor, OAI will assign an OAI Lead within the Awareness Phase.
3. The Supervisor, OAI or OAI Lead shall document the following items within the Awareness Phase of the OCIA Checklist if not already incorporated:
 - A. An initial description of the change.
 - B. Impacted System Operations & Market Administration Staff
 - C. The source of the change (e.g. FERC-filed accepted Docket, TCC Meeting, EtQ CAPA/Issue, Project, etc.).
 - D. If known, an estimated implementation date.
4. Upon completion of all portions of the OCIA Awareness Phase, the OAI Lead shall:
 - A. Sign-off on the OCIA Awareness Phase


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- B. E-mail the Manager, OAI, and Manager, OTP, requesting sign-off on the Awareness Phase of the OCIA. The request for sign-off must be identified in the e-mail subject line and a link to the OCIA Confluence page must be included in the body.

NOTE


An OCIA is ready to move to the Assessment Phase when all areas listed above have been entered and the OCIA is actively in progress.

5. Upon receipt of the Sign-off request the Manager, OAI and Manager, OTP will:
- A. Review the OCIA
 - B. Determine if the OCIA is ready to move to the Assessment Phase.

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5.3 Assessment Phase

1. The Supervisor, OAI, shall coordinate with OAI staff to assess the following areas for impact and the OAI Lead will document the results of the assessment in the OCIA Checklist:
 - A. System Operations software applications including, at a minimum:
 - Energy Management System (EMS),
 - Application Presentation Framework – Market Operator Interface (APF-MOI), and
 - Interchange Scheduling Software.
 - B. MRA software including, but not limited to:
 - eMarket,
 - APF-MOI,
 - Real-Time and Regulation Monitors,
 - Customer and Asset Management System (CAMS),
 - Forward Transmission Rights (FTR) software,
 - Forward Capacity Market (FCM) Reconfiguration Auction software,
 - Demand Response Audit and Testing Tool (DRATT), and
 - Claimed Capability Auditing Tool (CCAT)
 - C. OSS software applications including, but not limited to:
 - Control Room Operations Window (CROW) Outage software,
 - Long Term Operable Capacity Margin (LTOCM), and
 - Short Term Operable Capacity Margin (STOCM).
 - D. OPTI-supported tools including, at a minimum:
 - Opralog,
 - Emergency Notification System (ENS), and

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- Other tools designed or supported by OAI.

E. IROLs


- (1) The designated OAI staff member shall perform an initial assessment to determine if the change being assessed has an impact on existing IROLs or results in a new IROL. It is anticipated that a preliminary determination of IROL impact will have been made by OSS prior to the initiation of an OCIA, however, this step is designed to document OPTI awareness of the new or modified IROL. In general, IROLs will be located within the Interface Limits Calculator (ILC) of EMS, but may also be located in a Transmission Operating Guide (TOG). A new IROL or an update to an IROL would most likely be initiated by installation or retirement of a large generator or transmission line or by a change in the NERC definition of IROL.
 - (2) In the Assessment Phase, the OAI Lead shall, in collaboration with Operations Management, review and develop recommendations for proper IROL indicators, alarming, and notifications to provide proper situational awareness. IROLs will be further reviewed in the Preparation Phase.
2. The Manager, OTP, shall coordinate with OTP staff to assess the following areas for impact and document the results of the assessment in the OCIA Checklist:

A. Operating Procedures and documents

NOTE

Changes to ISO New England Operating Procedure (OP), Master/Local Control Center (M/LCC) procedure and System Operating Procedure (SOP) documents are processed using the guidance in SOP-RTMKTS.0210.0010 - Develop, Revise & Control SOP, OP, M/LCC Documents. Document change schedule timing requirements are contained in SVGPR.0210.0010 Administer NEPOOL Technical Committees, posted to the Enterprise Document Library (EDL) on Where Information Reaches Employees (WIRE). Changes to Control Room Operating Procedure (CROP) documents are processed using the guidance in SOP-RTMKTS.0125.0100 - Coordinate CROPs and JTL Administration.

- (1) The designated OTP staff member shall coordinate with the applicable procedure or document owners to determine and document if a change(s) is/are required. In all cases, consideration should be given to the resources and time it takes to complete the required processes to implement a change to the documents. This includes review of the following document types:
 - a. OPs

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b. M/LCCs

c. SOPs

d. CROPs

e. Manuals

f. Other documentation that requires NEPOOL Committee approval


- (2) The designated OTP staff member shall compile a list of potentially impacted procedure documents and the Procedure Owner(s) (or designee/s) required to support the procedure document change(s).

B. External Entities

- (1) The designated OTP staff member shall:
 - a. Identify potential impacts of the change on the following parties with regard to how the following entities interact with System Operations:
 - i. Market Participants
 - ii. Designated Entities(DEs)/Demand Designated Entities(DDEs)
 - iii. Local Control Centers (LCCs)
 - iv. Reliability Coordinators (RCs)
- (2) Compile a list of potentially impacted external entities.

C. Training Requirements


- (1) An assessment of potential training requirements in the form of a training needs analysis is essential to ensure that there is adequate time for the preparation and delivery of any training prior to the effective date/implementation date of the identified changes. Actual training program requirements are determined and documented in accordance with the processes described in the OPTI Training Manual.
- (2) The training needs analysis shall include an initial determination of the effect(s) of the identified change on each of the following individual training programs.
 - a. Initial Training for Control Room Operators
 - b. Continuing Training for Control Room Operators

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- c. Operating Support Personnel (as defined in accordance with NERC Reliability Standard PER-005 Operations Personnel Training Requirement 5)
 - d. Resource Operator OP-14 Training
- 3. The Manager, OAI, and the Manager, OTP, (or designees) shall collaborate to assess impacts to the Testing/Training Simulation Environment (TTSE) functionality, including TTSE versions of any OPTI supported tools which have been identified on the OAI space within Confluence.
- 4. Designated OPTI staff members shall:
 - A. Conduct assessments for areas of impact, and provide detailed results of the assessments to the Manager, OTP, Manager, OAI, or Supervisor, OAI, as assigned.
 - B. If the changes are not being covered within a Program Management Office (PMO) project or a normal software change process (i.e. Network Model Release), document any identified changes to existing software using the EtQ CAPA/Issues database.
- 5. Upon completion of all portions of the Assessment Phase, the OAI Lead shall:
 - A. Sign-off on the OCIA Awareness Phase
 - B. E-mail the Manager, OAI, and Manager, OTP, requesting sign-off on the Assessment Phase of the OCIA. The request for sign-off must be identified in the e-mail subject line and a link to the OCIA Confluence page must be included in the body.

NOTE An OCIA is ready to move to the Preparation Phase when all areas listed above have been assessed.
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- 6. The Manager, OAI and Manager, OTP will review the OCIA and determine if the OCIA is ready to move to the Preparation Phase.

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5.4 Preparation Phase

1. The Supervisor, OAI, shall coordinate with OAI staff to perform the following items, as necessary, based on the results of the Assessment Phase:
 - A. Write or review Business Requirements for applications impacted by the change by using the Business Requirements Job Aid maintained on the Operations Analysis & Integration space within Confluence as a guide. Business Requirements are also located on the Operations Analysis & Integration space within Confluence.
 - B. Perform Product Testing of applications impacted by the change by using the Software Testing Job Aid maintained on the Operations Analysis & Integration space within Confluence as a guide.
 - C. Update OPTI-supported tools impacted by the change and verify changes using completed or in-progress OCIA Checklists, maintained on the Operations Analysis & Integration space within Confluence as guides.
 - D. Ensure the OAI Lead collaborates with the Manager, OTP, to ensure the TTSE is prepared to support the change,
 - E. Ensure the OAI Lead updates the OCIA Checklist to reflect the progress of items above as necessary.
2. The Manager, OTP, shall coordinate with OTP staff to perform the following items, as necessary, based on the results of the Assessment Phase:
 - A. Coordinate with procedure owners and procedure administrators to implement changes to procedural guidance, including OPs, M/LCCs, SOPs, and CROPs.
 - B. Develop and deliver training in accordance with the OPTI Training Manual.
 - C. Ensure external entities have been made aware of the upcoming change,
 - D. Collaborate with the Supervisor, OAI, to ensure the TTSE is prepared to support the change.
 - E. Update the OCIA checklist to reflect the progress of items above as necessary.


NOTE

An OCIA is ready to move to the Implementation Phase when all items listed above have been completed

3. Upon completion of all portions of the Preparation Phase:

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- A. The Manager, OTP will review the OCIA to determine if it is ready to move to the Implementation Phase,
 - B. The Manager, OAI will review the OCIA to determine if it is ready to move to the Implementation Phase, and
 - C. The Supervisor, OAI, will review the OCIA to determine if it is ready to move to the Implementation Phase
4. If step 3 determines that the OCIA is determined to be ready to move to the Implementation Phase
 - A. The Manager, OTP or Supervisor, OAI will notify the Director, OPTI that the OCIA is being moved into Implementation Phase.

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5.5 Implementation Phase

1. The Supervisor, OAI and OAI Lead shall coordinate with the applicable ISO staff to:
 - A. Provide successful implementation of the change(s).
 - B. Provide follow-up support, as needed.
 - C. Perform analysis to ensure that the change is working as expected.
 - D. Identify potential changes based on issues encountered for further enhancements.
 - (1) Issues may be entered within the EtQ CAPA/Issues database after a PMO project, if the issue was not addressed during the project or arose post-project.


NOTE

An OCIA is ready to be closed out when all of Step 5.5.1 have been completed

2. Upon completion of all portions of the OCIA Implementation Phase:
 - A. Manager, OTP will review the OCIA and determine if it is ready to be closed out,
 - B. Manager, OAI will review the OCIA and determine if it is ready to be closed out, and
 - C. Supervisor, OAI, will review the OCIA and determine if it is ready to be closed out.
3. If the OCIA is determined to be ready to be closed out in Step 2, the Manager, OTP or Supervisor, OAI will notify the Director, OPTI of the OCIA close out.


5.6 Periodic OCIA Updates

1. The Supervisor, OAI (or designee) will provide periodic updates to the business units listed below, as necessary.
 - A. Operations Management
 - B. Director, OPTI
 - C. MRA Management
 - D. OSS Management
 - E. Additional OPTI staff members
 - F. If the assessment indicates a change to an existing IROL, or creation of a new

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IROL, the following additional attendees shall be invited:

- (1) PSMM
2. The Supervisor, OAI (or designee) shall include, at a minimum, the following in a periodic OCIA review meeting agenda:
 - A. Discussion of the status of OCIA's that have:
 - (1) Been created since the previous meeting,
 - (2) Been closed since the previous meeting,
 - (3) Changed phases since the last meeting.
 - B. Review of any critical time dependencies that must be met prior to the effective date/ implementation date.
 - (1) Designated OPTI staff members will document critical time dependencies on the OCIA Checklist(s).
 - C. In the case where an IROL is created or modified by an upcoming change, the periodic OCIA review meeting discussion shall include implementation plans to provide adequate situational awareness for Control Room Operators, including recommendations for the IROL related to the following:
 - (1) Indicators
 - (2) Alarming
 - (3) Notification criteria
3. Upon completion of the OCIA review, the Supervisor, OAI shall document, and make available, all action items identified during the meeting.

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6. Performance Measures

This procedure is properly followed when the change and its potential impact on System Operations & Market Administration are determined and identified modifications are assessed and implemented prior to implementation of the change.

7. References

North American Electric Reliability Corporation (NERC) Reliability Standard PER-005 - Operations Personnel Training

SOP-RTMKTS.0125.0100 - Coordinate CROPs and JTL Administration

SOP-RTMKTS.0210.0010 - Develop, Revise & Control SOP, OP, M/LCC Documents

SVGPR.0210.0010 Administer NEPOOL Technical Committees


8. Revision History

Rev. No.	Date	Reason	Contact
0	05/25/18	Initial procedure	Stephen George
1	05/19/20	Biennial review and updated to reflect Supervisor, OTP role, use of Confluence, and addition of Attachments A and B (Business Requirements and Product Test Checklists)	Stephen George
2	05/06/22	Updated to include organizational changes. Moved Attachments A and B to Confluence	Jaren Lutenege
2.1	05/01/24	Biennial review performed by procedure owner requiring no changes.	Jaren Lutenege

9. Attachments

Attachment A – Business Requirements Checklist – Retired (05/06/2022)

Attachment B – Product Test Checklist – Retired (05/06/2022)

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