



# Spp Integrated Marketplace Onboarding CHECKLIST

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## Revision History

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Version Number	Date	Author	Comments
1.0	2/16/2018	Amy Casavechia	Published 2018 version with keywords and course IDs for quick searching.
2.0	3/26/2020	Kim Burnside	Course info changes

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## Introduction

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This document provides the details around training courses to complete to ensure readiness to participate in the Integrated Marketplace. This list may also be helpful for onboarding new staff, or staff looking for a refresher on Marketplace topics.

### **What Courses Do I Need to Take?**

Each checklist contains training recommended for new Asset-Owning Market Participants (MPs) or Financial Only MPs, respectively.

Asset-Owning (AO) entities will use the “AO” column of the checklist.

Financial Only (FO) registered entities will use the “FO” column of the checklist.

Subject areas provide a way to target training based on the activities and roles performed by those taking the training. The subject areas available include:

- Getting Started
- Registration and Modeling
- Credit & Risk
- Congestion Hedging
- Information Technology
- Interchange Scheduling
- Market Operations
- Market Monitoring
- Settlements

Completion of this recommended training will provide MPs with knowledge on the concepts and activities in the Marketplace, as well as prepare MPs for participation in Market Training Environment (MTE) testing.

Any questions regarding this content should be submitted via the [Request Management System](#) (RMS).

**NOTE: All training must be completed by one or more individuals within each organization.**

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## SPP Learning Center (LMS) Registration Information

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Learners will use the SPP Learning Center (LMS) to search and register for:

- Online Courses
- Curriculum
- Instructor-Led (Classroom) Training (ILT)
- Virtual (Net Conference) Instructor-Led Training (VILT)
- Reference Materials
- Videos

**NOTE:** First-time visitors to the LMS must create an account to gain access. Please refer to the **2020 SPP Integrated Marketplace Training Catalog** for information on setting up an LMS account and searching for content.

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*To download the latest version of the 2020 SPP Integrated Marketplace Training Catalog use this link on spp.org (<https://www.spp.org/stakeholder-center/customer-training/integrated-marketplace-training/>) and refer to the bottom right list of Related Documents.*

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# Market Participant Training Checklist

The “**Getting Started**” courses will provide all MPs, regardless of role, an overview and the foundational concepts of the Integrated Marketplace.

Completion of additional training on this list will vary, depending on the roles within each MP’s organization. However, we encourage at least one individual within each organization to complete all training listed.

**NOTE:** Asset Owning MPs use the “AO” column. Financial Only MPs use the “FO” column. Type a “keyword” (underlined) to search the LMS and return all courses for a specific subject area. Type a “course id” to search and return a specific course from the list.

Keyword / Course ID	Market Participant Onboarding Training	Course Length	AO	FO	Type
<u>IMP01</u>	<u>Getting Started</u>				
IMP01CUR002	Integrated Marketplace Overview (Self-Study)	2 hours	✓	✓	Course
IMP01REF001	Getting Started with Marketplace Portal	varies	✓	✓	Materials
<u>IMP07</u>	<u>Registration</u>				
IMP07CBT004	Network Model Overview	3 Minutes	✓	✓	Course
IMP07CBT001	Commercial Model Overview	6 Minutes	✓	✓	Course
IMP07CBT006	Relationship Between Commercial, Network and TCR Models	7 Minutes	✓	✓	Course
IMP07CBT003	Model Configuration Option Examples	24 Minutes	✓		Course
IMP07CBT005	Registration Configuration Effect on Asset Operations	3 Minutes	✓		Course
IMP07CBT008	Timelines and Requirements for Model Updates	6 Minutes	✓		Course
IMP07REF001	Integrated Marketplace JOU Reference Guide	<i>varies</i>	✓		Materials
<u>IMP04</u>	<u>Information Technology</u>				
IMP04CBT001	Using ICCP for Data Exchange	5 Minutes	✓		Course
IMP04CBT004	Key Systems and Security for Market Participants	6 Minutes	✓	✓	Course
<u>IMP06</u>	<u>Market Operations</u>				

Keyword / Course ID	Market Participant Onboarding Training	Course Length	AO	FO	Type
IMP06CBT007	Integrated Marketplace Demand Bids	9 Minutes	✓	✓	Course
IMP07CBT008	Integrated Marketplace Supply Offers	13 Minutes	✓	✓	Course
IMP07CBT003	Day-Ahead and Real-Time Markets: A Conceptual View	13 Minutes	✓	✓	Course
IMP06CBT009	Introduction to Market Co-Optimization	16 Minutes	✓	✓	Course
IMP06CBT012	Market Clearing Algorithms	18 Minutes	✓	✓	Course
IMP06CBT010	Learning Burst: Time-Related Commitment Parameters	8 Minutes	✓		Course
IMP06REF003	SPP Marketplace Timelines Quick Reference Card	varies	✓	✓	Materials
IMP06REF009	Daylight Savings Time Quick Reference Card	varies	✓	✓	Materials
IMP06CBT004	Day-Ahead Market Timeline and Activities	15 Minutes	✓	✓	Course
IMP06CBT022	Reliability Unit Commitment Process	21 Minutes	✓	✓	Course
IMP06CBT020	Ramp Rate Interactions	23 Minutes	✓		Course
IMP06CBT021	Real-Time Balancing Market Timeline and Activities	24 Minutes	✓	✓	Course
IMP06REF011	Control Status Reference Guide	<i>Varies</i>	✓		Materials
IMP06REF006	How to Clear Operating Reserve Products: A Checklist	<i>Varies</i>	✓		Materials
IMP06CBT016	Overview of Reserve Zones	23 Minutes	✓		Course
<b>IMP03</b>	<b><u>Credit and Risk Management</u></b>				
IMP03CBT005	Credit Policy Overview	17 Minutes	✓	✓	Course
IMP03CBT006	Credit Scoring Methodology	16 Minutes	✓	✓	Course
IMP03CBT004	Credit Events/ Credit Defaults	3 Minutes	✓	✓	Course
IMP03CBT003	Communication Mechanisms for Credit	6 Minutes	✓	✓	Course
IMP03CBT007	Determinants Used for Credit Exposure Calculations	11 Minutes	✓	✓	Course
IMP03CBT008	Reference Prices Used for Credit Exposure Calculations	11 Minutes	✓	✓	Course
IMP03CBT002	Calculating Total Potential Exposure	10 Minutes	✓	✓	Course

Keyword / Course ID	Market Participant Onboarding Training	Course Length	AO	FO	Type
<b><u>IMP05</u></b>	<b><u>Market Monitoring</u></b>				
IMP05CBT004	Market Monitoring Overview	10 Minutes	✓	✓	Course
IMP05CBT005	Market Power and Market Manipulation	11 Minutes	✓	✓	Course
IMP05CBT003	Market Mitigation Overview	4 Minutes	✓	✓	Course
IMP05CBT001	Automatic Mitigations	13 Minutes	✓	✓	Course
IMP05CBT006	Non-Automatic Mitigations	8 Minutes	✓	✓	Course
IMP05CBT002	Learning Burst: Market Mitigation	7 Minutes	✓	✓	Course
IMP05CBT007	Learning Burst: Must Offer Requirement	11 Minutes	✓		Course
IMP05REF002	Overview of Opportunity Cost Calculator	<i>Varies</i>	✓		Materials
<b><u>IMP08</u></b>	<b><u>Settlements</u></b>				
IMP08CBT101	Market Settlement: Overview	5 Minutes	✓	✓	Course
IMP08CBT105	Market Settlement: Disputes	7 Minutes	✓	✓	Course
IMP08CBT015	Regulation Compensation Overview	12 Minutes	✓		Course
IMP08CBT008	Make-Whole Payment Charge Types	14 Minutes	✓		Course
IMP08CBT001	ARR and TCR Charge Types	4 Minutes	✓	✓	Course
IMP08CBT006	Energy Charge Types	14 Minutes	✓		Course
IMP08CBT005	Demand Response Charge Types	2 Minutes	✓		Course
IMP08CBT012	Operating Reserve Charge Types	4 Minutes	✓		Course
IMP08CBT014	Over-Collected Losses Charge Types	4 Minutes	✓		Course
IMP08CBT013	Other Charge Types	5 Minutes	✓	✓	Course
IMP08CBT016	Revenue Neutrality Uplift Charge Types	2 Minutes	✓		Course
<b><u>IMP02</u></b>	<b><u>Congestion Hedging (If participating in TCR Market)</u></b>				
IMP02CBT009	Understanding Congestion	4 Minutes	✓	✓	Course



Keyword / Course ID	Market Participant Onboarding Training	Course Length	AO	FO	Type
IMP02CBT007	Transmission Congestion Rights (TCR) Overview	16 Minutes	✓	✓	Course
IMP02CBT005	Long-Term Congestion Rights (LTCR) Overview	15 Minutes	✓	✓	Course
IMP02CBT004	Auction Revenue Rights (ARR) Overview	16 Minutes	✓	✓	Course
IMP02CBT001	Acquiring TCRs in the Annual TCR Auction	44 Minutes	✓	✓	Course
IMP02CBT002	Acquiring TCRs in the Monthly TCR Auction	13 Minutes	✓	✓	Course
IMP02CBT003	Acquiring TCRs in the Secondary Market	3 Minutes	✓	✓	Course
IMP02CBT008	ARRs and TCRs: Tying It All Together	7 Minutes	✓	✓	Course
IMP02CBT006	TCR Settlements	12 Minutes	✓	✓	Course
IMP02REF006	Transmission Congestion Rights (TCR) Market User Interface (MUI) Quick Reference Guide	<i>varies</i>	✓	✓	Materials
IMP02REF007	Transmission Congestion Rights (TCR) Process Quick Reference Guide	<i>varies</i>	✓	✓	Materials
<b><u>IMP06-SPECIAL</u></b>	<b><u>Special Resources (If Applicable)</u></b>				
IMP06CBT019	Quick-Start (QS) Qualified Resources	40 Minutes	✓		Course
IMP06CBT006	Dispatchable Variable Energy Resources (DVERs)	37 Minutes	✓		Course
IMP06CBT015	Non-Dispatchable Variable Energy Resources (NDVERs)	30 Minutes	✓		Course
IMP06CBT018	Pseudo-Tied Assets	31 Minutes	✓		Course
IMP06CBT005	Dispatchable Demand Response (DDR) Resources	35 Minutes	✓		Course
IMP06CBT001	Block Demand Response (BDR) Resources	37 Minutes	✓		Course
IMP06REF007	EDR Quick Reference Card	<i>varies</i>	✓		Materials
IMP06REF007	Dispatch Flags for Variable Energy Resources (VERs) Reference Card	<i>varies</i>	✓		Materials
<b><u>IMP06-VIRTUAL</u></b>	<b><u>Virtual Transactions (If Applicable)</u></b>				
IMP06CBT026	Virtual Transactions Overview	5 Minutes	✓	✓	Course
IMP06CBT025	Virtual Transaction Examples	10 Minutes	✓	✓	Course
IMP06CBT027	Virtuals as a Hedging Mechanism	12 Minutes	✓	✓	Course

Keyword / Course ID	Market Participant Onboarding Training	Course Length	AO	FO	Type
IMP06CBT017	Overview of Virtual Credit Requirements	5 Minutes	✓	✓	Course
IMP06CBT023	Virtual Credit Limits and Credit Exposure	5 Minutes	✓	✓	Course
IMP06CBT024	Virtual Reference Prices	6 Minutes	✓	✓	Course
IMP06CBT002	Calculating Credit Exposure for Virtuals	7 Minutes	✓	✓	Course
IMP06CBT013	Market Monitoring Implications for Virtuals	3 Minutes	✓	✓	Course