

Conservative System Operations

SO-P-NOP-00-449 Rev: 0

ROLE			ROLE	
BAO	<input checked="" type="checkbox"/>		SM	<input checked="" type="checkbox"/>
IRAC	<input checked="" type="checkbox"/>		RC	<input checked="" type="checkbox"/>
UDS			RGD	<input checked="" type="checkbox"/>
GOP	<input checked="" type="checkbox"/>		TOP	<input checked="" type="checkbox"/>
LBA	<input checked="" type="checkbox"/>		MP	<input checked="" type="checkbox"/>

Rev History	Reason for Issue	Revised By	Issue Date	Effective Date
0	Annual Review. Enhance RTO-OP-018 to meet new formatting and writing standards as part of PREP. Operating Procedure Owner approval on file.	Chris Hoffman/ Eric Young	10/28/2016	10/28/2016
RTO-OP-018-r15.1	Removed GOPs from Step 3.2.3.3. Operating Procedure Owner approval on file.	Terry Wright	02/16/2016	02/16/2016

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1.0 Purpose

Provide instructions for identifying and coordinating Conservative System Operations to maximize MISO's ability to operate the Bulk Electric System (BES) reliably during periods of extreme weather conditions and other abnormal circumstances that pose an imminent threat to the Bulk Electric System.

Provide instructions for identifying and coordinating severe weather/environmental conditions to provide an early indication to operating personnel that system conditions may require the use of MISO Emergency Procedures or Conservative System Operations process.

2.0 Roles and Responsibilities

1. Generator Operator (GOP)
 - Reviews and prepares to implement applicable portions of this procedure when notified of Alert conditions.
 - Follows internal procedures and communication protocols including notification to all stations and key personnel of declaration.
2. Local Balancing Authority (LBA)
 - Reviews and prepares to implement applicable portions of this procedure when notified of Alert conditions.
 - Follows internal procedures and communication protocols including notification to all stations and key personnel of declaration.
3. Market Participant (MP)
 - Reviews and prepares to implement applicable portions of this procedure when notified of Alert conditions.
 - Follows internal procedures and communication protocols including notification to all stations and key personnel of declaration.
4. Transmission Operator (TOP)
 - Reviews and prepares to implement applicable portions of this procedure when notified of Alert conditions.
 - Follows internal procedures and communication protocols including notification to all stations and key personnel of declaration.
5. MISO Shift Manager (SM)
 - Coordinates actions necessary to alleviate Alert conditions.
 - Ensures all necessary notifications are performed throughout the duration of Alert conditions.

6. MISO Operations Personnel
 - Performs actions to alleviate Alert Conditions as outlined in this procedure.

3.0 Precautions and Limitations

1. Alerts issued within this procedure may be implemented for the entire MISO Reliability Footprint, MISO Balancing Authority (BA) Area, or a sub-area of the two areas. A sub-area may consist of a single BA or Local Balancing Authority (LBA), a group of LBAs or BAs, or portions of LBAs and BAs. []
2. During conservative system operations, real-time system conditions may reflect conservative transfers, double contingencies activation, and additional reactive reserves. []
3. MISO will restrict communications of sensitive information related to reliability to market participants and to the public in order to protect the integrity of the BES. []
4. Attachment 1 — MISO Declaration Template provides a generic example of the declaration submitted via MCS. Message content and information may be adjusted based on system conditions. []
5. Attachment 2 — Additional Information provides supporting information that may be used in the performance of this procedure. []

4.0 Prerequisites

None

5.0 Instructions

5.1 Conservative System Operations

5.1.1 MISO Conservative System Operations Actions

- | | |
|-------------------|---|
| SM/
RC/
BAO | 1. WHEN conditions warrant the need for Conservative Operations THEN DECLARE Conservative System Operations as follows: [] |
| SM | A. DEFINE boundaries of Conservative System Operations Area. [] |
| SM | B. DEFINE start and end time of Conservative System Operations. [] |



SM C. **SEND** Conservative System Operations Declaration to affected members via MCS including the following:

- MSS
- RT Ops Website (public-only)
- Operator Log
- Management Text List
- Email Notifications per SO-I-NOP-00-448

SM D. **SEND** Conservative System Operations Declaration summary information via Reliability Coordinator Information System (RCIS).

SM **Note**

The following steps provide a list of potential actions that MISO may implement based on reasons that warranted Conservative System Operations.

2. **REVIEW** the following Control Center staffing levels:

- Carmel
- Eagan
- Little Rock
- Sheridan

SM 3. **DETERMINE** the need for additional staffing to manage the conditions identified.

RC/IRAC 4. **REVIEW** System Adequacy Requirements.

SM/RC **Note**

Maintenance includes non-essential planned maintenance, tree trimming, Remote Terminal Unit (RTU) work, protection and control testing, etc., unless such maintenance will result in improved BES monitoring, control and security. Such maintenance will be coordinated between MISO and the applicable entity.

5. **COORDINATE** with affected entities to identify at risk generation or transmission equipment maintenance as follows:

SM/RC A. **REVIEW** outage plans to determine if any maintenance or testing, scheduled or being performed on any monitoring, control, generation or transmission equipment can be deferred or canceled.

SM/ RC B. IF scheduled maintenance will **NOT** adversely affect BES and improve BES monitoring, control, and reliability, THEN **COORDINATE** with TOP or GOP to identify maintenance for potential completion.

SM **Note**
 Critical computer systems can be within MISO or MISO member system impacted by Conservative System Operations, including EMS and Inter-Control Center Communications Protocol (ICCP) maintenance and telecommunication equipment.

6. **IDENTIFY** at risk critical computer systems maintenance due to Conservative Operations declaration as follows:

SM A. **REVIEW** outage plans to determine if any critical computer systems maintenance or testing, scheduled or being performed, can be deferred or canceled.

SM B. IF critical computer system maintenance will result in improved BES monitoring, control and reliability, and **NOT** adversely affect BES, THEN **IDENTIFY** maintenance for potential completion.

SM C. **SUSPEND** all critical computer maintenance **NOT** identified for completion.

5.1.2 MISO Member Conservative System Operations Actions

GOP/ TOP 1. **COORDINATE** with MISO and BA/LBA to perform the following:

GOP/ TOP A. **REVIEW** outage plans to determine if any maintenance or testing, scheduled or being performed on any monitoring, control, generation or transmission equipment can be deferred or canceled.

GOP/ TOP B. IF scheduled maintenance will result in improved BES monitoring, control and reliability, and **NOT** adversely affect BES, THEN **COORDINATE** with MISO and LBA to identify maintenance for potential completion.

5.2 Severe Weather Alert

5.2.1 MISO Severe Weather Alert Actions

SM 1. WHEN forecasted extreme weather conditions are projected to impact the BES, THEN **DECLARE** Severe Weather Alert as follows:

SM A. **DEFINE** boundaries of Severe Weather Alert Area.

SM B. **DEFINE** start and end time of Severe Weather Alert.



SM	<p style="text-align: center;">Note [□]</p> <p>Declaration updates should be provided on a regular basis as the weather system moves across the MISO footprint.</p>
	<p>C. SEND Severe Weather Alert Declaration, including nature of Alert, to affected members via MCS including the following: [□]</p> <ul style="list-style-type: none"> • MSS • RT Ops Website (public-only) • Operator Log • Management Text List • Email Notifications per SO-I-NOP-00-448
SM	<p>D. SEND Severe Weather Alert Declaration summary information via RCIS. [□]</p>
SM/ RC	<p style="text-align: center;">Note [□]</p> <p>Maintenance includes non-essential planned maintenance, tree trimming, Remote Terminal Unit (RTU) work, protection and control testing, etc., unless such maintenance will result in improved BES monitoring, control and security. Such maintenance will be coordinated between MISO and the applicable entity.</p>
	<p>2. COORDINATE with affected entities to identify at risk maintenance as follows: [□]</p>
SM/ RC	<p>A. REVIEW outage plans to determine if any maintenance or testing, scheduled or being performed on any monitoring, control, generation or transmission equipment can be deferred or canceled. [□]</p>
SM/ RC	<p>B. IF scheduled maintenance will result in improved BES monitoring, control and reliability, and NOT adversely affect BES, THEN COORDINATE with TOP or GOP to identify maintenance for potential completion. [□]</p>
TOP GOP/ TOP GOP/ TOP	<p>5.2.2 MISO Member Severe Weather Alert Actions</p> <p>1. REPORT severe weather conditions in area to MISO RC. [□]</p> <p>2. COORDINATE with affected entities to perform the following: [□]</p> <p>A. REVIEW outage plans to determine if any maintenance or testing, scheduled or being performed on any monitoring, control, generation or transmission equipment can be deferred or canceled. [□]</p>



GOP/
TOP B. IF scheduled maintenance will result in improved BES monitoring, control and reliability, and **NOT** adversely affect BES, THEN **COORDINATE** with affected entities to identify maintenance for potential completion. [□]

5.3 Hot Weather Alert

5.3.1 MISO Hot Weather Alert Actions

- SM 1. WHEN projected temperatures are to exceed Table 1: Hot Weather Alert Temperature Criteria along with high humidity and concerns about Capacity and Operating Reserve requirements, THEN **DECLARE** Hot Weather Alert as follows: [□]
- SM A. **DEFINE** boundaries of Hot Weather Alert Area. [□]
- SM B. **DEFINE** start and end time of Hot Weather Alert. [□]
- SM C. **SEND** Hot Weather Alert Declaration to affected members via MCS including the following: [□]
- MSS
 - RT Ops Website (public-only)
 - Operator Log
 - Management Text List
 - Email Notifications per SO-I-NOP-00-448
- SM D. **SEND** Hot Weather Alert Declaration summary information via RCIS. [□]
- SM/
IRAC 2. **REVIEW** System Adequacy Requirements. [□]



RGD 3. **CONTACT** MPs to determine fuel/environmental limitations and unit availability for the projected Alert period.

RC/
RGD **Note**
 Maintenance includes non-essential planned maintenance, tree trimming, Remote Terminal Unit (RTU) work, protection and control testing, etc., unless such maintenance will result in improved BES monitoring, control and security. Such maintenance will be coordinated between MISO and the applicable entity.

4. **COORDINATE** with affected entities to identify at risk maintenance as follows:

SM/
RC A. **REVIEW** outage plans to determine if any maintenance or testing, scheduled or being performed on any monitoring, control, generation or transmission equipment can be deferred or canceled.

SM/
RC B. IF scheduled maintenance will result in improved BES monitoring, control and reliability, and **NOT** adversely affect BES, THEN **COORDINATE** with TOP or GOP to identify maintenance for potential completion.

5.3.2 MISO Member Hot Weather Alert Actions

GOP 1. **NOTIFY** and **UPDATE** MISO Regional Generation Dispatcher (RGD) concerning all fuel/environmental limited resources for the duration of Alert.

GOP/
TOP 2. **COORDINATE** with affected entities to perform the following:

GOP/
TOP A. **REVIEW** outage plans to determine if maintenance or testing, scheduled or being performed on monitoring, control, generation or transmission equipment can be deferred or canceled.

GOP/
TOP B. IF scheduled maintenance will result in improved BES monitoring, control and reliability, and **NOT** adversely affect BES, THEN **COORDINATE** with affected entities to identify maintenance for potential completion.

5.4 Cold Weather Alert

5.4.1 MISO Cold Weather Alert Actions

- | | |
|-------------|---|
| SM | 1. WHEN projected temperatures are to fall below Table 2: Cold Weather Alert Temperature Criteria along with severe wind chill factors and concerns about Capacity and Operating Reserve requirements, THEN DECLARE Cold Weather Alert as follows: [□] |
| SM | A. DEFINE boundaries of Cold Weather Alert Area. [□] |
| SM | B. DEFINE start and end time of Cold Weather Alert. [□] |
| SM | C. SEND Cold Weather Alert Declaration to affected members via MCS including the following: [□] |
| | <ul style="list-style-type: none"> • MSS • RT Ops Website (public-only) • Operator Log • Management Text List • Email Notifications per SO-I-NOP-00-448 |
| SM | D. SEND Cold Weather Alert Declaration summary information via RCIS. [□] |
| SM/
IRAC | 2. REVIEW System Adequacy Requirements. [□] |
| RGD | 3. CONTACT MPs to determine fuel/environmental limitations and unit availability for the projected Alert period. [□] |
| RC/
RGD | <p>Note [□]</p> <p>Maintenance includes non-essential planned maintenance, tree trimming, Remote Terminal Unit (RTU) work, protection and control testing, etc., unless such maintenance will result in improved BES monitoring, control and security. Such maintenance will be coordinated between MISO and the applicable entity.</p> |
| | 4. COORDINATE with affected entities to identify at risk maintenance as follows: [□] |
| SM/
RC | A. REVIEW outage plans to determine if any maintenance or testing, scheduled or being performed on any monitoring, control, generation or transmission equipment can be deferred or canceled. [□] |
| SM/
RC | B. IF scheduled maintenance will result in improved BES monitoring, control and reliability, and NOT adversely affect BES, THEN COORDINATE with TOP or GOP to identify maintenance for potential completion. [□] |



5.4.2 MISO Member Cold Weather Alert Actions

- | | | | |
|-------------|--|---|------------------------------|
| GOP | | 1. IMPLEMENT plans to winterize units and plants to ensure availability during emergency conditions. | [<input type="checkbox"/>] |
| GOP | | 2. COORDINATE personnel staffing to ensure all scheduled combustion turbines and diesel generators are available for loading during load pick up period. | [<input type="checkbox"/>] |
| GOP | | 3. REVIEW fuel supply/delivery schedules. | [<input type="checkbox"/>] |
| GOP | | 4. NOTIFY <u>and</u> UPDATE MISO RGD concerning all fuel/environmental limited resources for the duration of Alert. | [<input type="checkbox"/>] |
| GOP/
TOP | | 5. COORDINATE with affected entities to perform the following: | [<input type="checkbox"/>] |
| GOP/
TOP | | A. REVIEW outage plans to determine if maintenance or testing, scheduled or being performed on monitoring, control, generation or transmission equipment can be deferred or canceled. | [<input type="checkbox"/>] |
| GOP/
TOP | | B. IF scheduled maintenance will result in improved BES monitoring, control and reliability, and NOT adversely affect BES, THEN COORDINATE with affected entities to identify maintenance for potential completion. | [<input type="checkbox"/>] |

5.5 Geo-Magnetic Disturbance (GMD) Alert of Warning (K-8 or higher)

5.5.1 MISO GMD Alert of Warning (K-8 or higher) Actions

- | | | | |
|----|--|--|------------------------------|
| SM | | 1. IF Space and Weather Prediction Center (SWPC) issues a GMD Warning or Alert of K-8 or higher, THEN DECLARE Conservative Operations due to GMD Alert as follows: | [<input type="checkbox"/>] |
| SM | | A. DEFINE boundaries of GMD Alert Area. | [<input type="checkbox"/>] |
| SM | | B. DEFINE start and end time of GMD Alert. | [<input type="checkbox"/>] |
| SM | | C. SEND GMD Alert Declaration to affected members via MCS including the following: | [<input type="checkbox"/>] |
| | | <ul style="list-style-type: none"> • MSS • RT Ops Website (public-only) • Operator Log • Management Text List • Email Notifications per SO-I-NOP-00-448 | |
| SM | | D. SEND GMD Alert Declaration summary information via RCIS. | [<input type="checkbox"/>] |

5.5.2 MISO Member GMD Alert of Warning (K-8 or higher) Actions

- GOP/MP 1. **COMMUNICATE** condition of GMD monitoring to MISO RC.
- GOP/MP 2. **ENSURE** mitigation actions are performed per SO-P-AOP-01 Geomagnetic Disturbance Operating Plan.
- LBA/TOP 3. **COMMUNICATE** condition of GMD monitoring to MISO RC.
- LBA/TOP 4. **ENSURE** mitigation actions are performed per SO-P-AOP-01 Geomagnetic Disturbance Operating Plan.

5.6 Termination

5.6.1 MISO Termination Actions

- SM 1. WHEN Alert conditions are **NO** longer met, THEN **BACK OUT** of Alert as follows:
- SM A. **SEND** Termination update to affected members via MCS including the following:
 - MSS
 - RT Ops Website (public-only)
 - Operator Log
 - Management Text List
 - Email notifications per SO-I-NOP-00-448
- SM B. **SEND** Alert Update summary information via RCIS.

SM **Note**

Termination steps shall be exited in a controlled and deliberate manner so to **NOT** adversely affect system reliability while minimizing the impact of these actions on affected entities.

- C. **ISSUE** Operating Instructions necessary to return the system to normal.

6.0 Definitions

- 1. System Adequacy Requirements - The amount of Operating Reserves versus Operating Reserve Requirements.

7.0 References

7.1 MISO References

- 1. PSS-OP-001
- 2. SO-RA-NOP-00-429
- 3. RTO-AOP-001 System Status Levels Procedure



4. SO-I-NOP-00-448
5. SO-P-NOP-00-431 Communications Protocol For Operating Instructions
6. RTO-OP-009 Operational Performance Reliability Criteria Procedure
7. SO-P-AOP-01 Geomagnetic Disturbance Operating Plan
8. SO-P-EOP-00-002 MISO Market Capacity Emergency



Attachment 1 — MISO Declaration Template

Declaration Type: [Conservative System Operations Declaration or Severe/Cold/Hot Weather Alert]

MISO is declaring [Conservative System Operations or Severe/Cold/Hot Weather Alert] in effect from [MM/DD/YYYY] [HH:MM] EST and [MM/DD/YYYY] [HH:MM] EST for the following entities:

List affected entities for Area or sub-area affected by [Conservative System Operations or Severe/Cold/Hot Weather Alert] Declaration.

The reason for the declaration is:

(state the reason(s): Maximize MISO's ability to maintain reliable operation of the Bulk Electric System, prepare operating personnel and facilities for extreme weather conditions, etc.).

MISO declared [Conservative System Operations for the purpose of maximizing MISO's ability to maintain reliable operation of the Bulk Electric System] or [Severe/Cold/Hot Weather Alert to prepare operating personnel and facilities for extreme weather conditions].

Members are to prepare for a [Conservative System Operations Declaration or Severe/Cold/Hot Weather Alert] by reviewing the applicable MISO Member Actions of SO-P-NOP-00-449 Conservative System Operations.

Attachment 2 — Additional Information

1.0 Conservative System Operations

1. The decision to implement Conservative System Operations will be made by the MISO Shift Manager (SM), Balancing Authority Operator (BAO), or Reliability Coordinator (RC) and may be based on any condition, combination of conditions, or threat(s) to the transmission system that, in the opinion of the SM, BAO, or RC, could result in single contingencies or multiple simultaneous (or near-simultaneous) contingencies occurring on the BES.
2. Conditions or events that could warrant implementation may include, but are **NOT** limited to:
 - Geo-Magnetic Disturbances (GMDs) of a magnitude that may cause system disturbances.
 - Potential fuel delivery issues identified.
 - Environmental conditions.
 - Weather-related conditions such as severe thunderstorms, intense lightning storms, tornadoes, ice/snow accompanied with high winds, hurricanes and floods.
 - Contingency related or extreme cold or hot weather conditions that lead to sub-area or system-wide capacity shortages.
 - Suspected or confirmed terrorist activity aimed at causing instability on the transmission system.
 - If, at any time, MISO loses (or may lose) the ability to accurately monitor the BES or a portion of the BES as applicable. Refer to RTO-AOP-001 System Status Levels Procedure.
 - An event or condition that in the judgment of the SM, BAO, or RC poses an imminent threat to the interconnected transmission system.

2.0 Severe Weather Alert

1. A severe weather alert is to prepare operating personnel and facilities for extreme weather conditions that may impact the integrity of the BES.
2. Extreme weather conditions are weather-related conditions such as severe thunderstorms with high winds and/or intense lightning storms, tornadoes, ice/snow accompanied with high winds, hurricanes etc.
3. A severe weather alert should be issued when forecasted extreme weather conditions are projected and have the potential to impact the BES.

3.0 Hot Weather Alert

1. A Hot Weather Alert is to prepare operating personnel and facilities for extreme hot or humid weather conditions which may cause capacity requirements to be higher than normal and unit unavailability to be greater than forecasted and these conditions are expected to persist for an extended period.
2. A Hot Weather Alert can be issued by MISO, on a market footprint or a sub-area basis, if projected temperatures are to exceed the temperatures defined in Table 1: Hot Weather Alert Temperature Criteria along with high humidity and there are concerns about Capacity and Operating Reserve requirements.

Table 1: Hot Weather Alert Temperature Criteria

Region	Weather Location	Temperatures (°F)
Central	Indianapolis, IN	95
Central	St. Louis, MO	95
Central	Detroit, MI	90
Central	Madison, WI	90
Central	Milwaukee, WI	90
North	Des Moines, IA	95
North	St. Paul, MN	90
South	New Orleans, LA	98
South	Little Rock, AR	98
South	Jackson, MS	98
South	Houston, TX	98
South	Baton Rouge, LA	98

4.0 Cold Weather Alert

1. A Cold Weather Alert is to prepare operating personnel and facilities for extreme cold weather conditions which may cause capacity requirements to be higher than normal and unit unavailability to be greater than forecasted and these conditions are expected to persist for an extended period.
2. A Cold Weather Alert can be issued by MISO, on a market footprint or a sub-area basis, if projected temperatures are to exceed fall below the temperatures defined in Table 2: Cold Weather Alert Temperature Criteria along with severe wind chill factors and concerns about Capacity and Operating Reserve requirements.

Table 2: Cold Weather Alert Temperature Criteria

Region	Weather Location	Temperatures (°F)
Central	Indianapolis, IN	-5
Central	St. Louis, MO	-5
Central	Detroit, MI	-5
Central	Madison, WI	-15
Central	Milwaukee, WI	-15
North	Des Moines, IA	-15
North	St. Paul, MN	-15
South	New Orleans, LA	28
South	Little Rock, AR	28
South	Jackson, MS	28
South	Houston, TX	28
South	Baton Rouge, LA	28

5.0 Geo-Magnetic Disturbance Alert of Warning (K-8 or higher)

1. A GMD Alert or Warning is to prepare RCs, TOPs, BAs, LBAs, and GOPs with advance notice of an upcoming GMD. Notice can range from a few hours to less than an hour depending on the notice given from the Space Weather Prediction Center (SWPC). Frequent communications between the TOPs, LBAs, BAs, and GOP with their RC in regards to GMD monitored equipment should occur.

2. The specific actions MISO will take to disseminate current and forecasted space weather information, including GMD Alerts or Warnings of K-7 or higher, is documented in SO-P-AOP-01 Geomagnetic Disturbance Operating Plan.
3. Specific actions that MISO, or TOPs, LBAs, BAs, or GOPs in the MISO Reliability Coordinator Footprint can take to mitigate the impacts of space weather on the transmission system is documented in SO-P-AOP-01 Geomagnetic Disturbance Operating Plan.

6.0 MISO Communications Protocols

6.1 General Notifications

1. MISO shall communicate conditions as appropriate to LBAs, BAs, MPs, GOPs, and TOPs, government agencies, and to Neighboring BAs, TOPs, and RCs via the appropriate communication tools.
2. MISO will restrict communications of sensitive information related to reliability to MPs and to the public in order to protect the integrity of the BES.
3. MISO Blast Calls
4. MISO will provide summary information to the following:
 - *MISO Alerts BA and TO
 - *MISO Alerts FERC, State Comm., RRO, Neighboring RCs and BAs
 - *RT Ops Notification
5. CMPL on-call representative will be contacted via phone and coordinate with the SM on any necessary notifications per SO-I-NOP-00-448 to make necessary notifications.
6. For potential physical or cyber security attack or threat, the following notifications are made by SM per PSS-OP-001:
 - A. Manager of Physical Security & Safety or Site Security
 - B. Operations Compliance (CMPL) On-Call