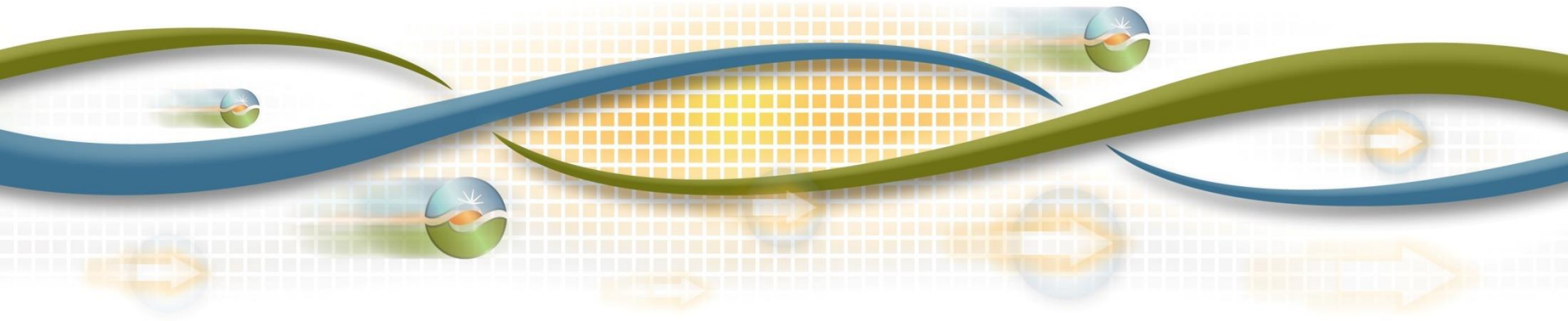


Convergence bidding

Participating in the markets

Registering as a convergence bidding entity



Module objectives

By the end of this section, you will be able to:

- Identify the location of the convergence bidding entity forms
- Identify the forms that are required for a convergence bidding entity agreement

Registering as a convergence bidding entity

- Must register with the ISO as a convergence bidding entity and submit the following with application:
 - Proposed date to start submitting virtual bids (no less than 60 business days after date application is filed)
 - Affiliate disclosure form
 - Name of scheduling coordinator and SCIDs that will be used for submission of virtual bids on behalf of the convergence bidding entity
 - If another SC is representing a convergence bidding entity other than themselves as an SC, then the SC must submit the SC acknowledging representation of CB entity

Registering as a convergence bidding entity

- If becoming a new scheduling coordinator, then submit the SC application indicating convergence bidding in section II, Financial Markets
- Forms located on the ISO website at www.CAISO.com
[▶ Participate ▶ Market Products ▶ Convergence Bidding](#)



ABOUT US PARTICIPATE

STAY INFORMED PLANNING MARKET & OPERATIONS RULES

- About Us
- Participate
 - New Participant Contact Form
 - Resource Interconnection Guide
 - Scheduling Coordinator
 - Generation
 - Load and Demand Response
 - Storage
 - Metered Subsystem
 - Transmission
 - Utility Distribution Company
 - Metering and Telemetry
 - Market Products
 - Ancillary Services
 - Convergence Bidding Rights
 - Convergence Bidding
 - Application Process
 - Training
- Stay Informed
- Planning
- Market & Operations
- Rules

Home > Participate > Market Products > Convergence bidding

Convergence bidding

This market feature allows a scheduling coordinator representing a registered convergence bidding entity to submit bids in the day-ahead market. Awards are paid or charged the day-ahead price and automatically liquidated at the relevant hour-ahead scheduling process or real-time price. Email questions about the registration process to SCApplication@caiso.com.

ISO Tariff
Reference Section 4.5.2 Eligible Customers and Convergence Bidding Entities

Process and requirements
To register as a convergence bidding entity, entities must complete and submit the convergence bidding registration forms and the ISO Affiliate forms.

List of Scheduling Coordinators, CRR Holders and Convergence Bidding Entities 11/20/2014 11:42

Registration documents to become a convergence bidding entity

- ISO Affiliate and Resource Control Agreement Disclosure Form 3/27/2014 11:22
- Scheduling Coordinator Acknowledging Representation of Convergence Bidding Entity 10/18/2013 15:18
- Convergence Bidding Entity Agreement Registration Form 10/18/2013 15:18

Registration documents to become a certified scheduling coordinator

Scheduling Coordinator Application Form 11/10/2012 09:10

Scheduling coordinator

Agreements and informational request sheets

- Convergence Bidding Entity Agreement Oct 22, 2010 11/12/2011 13:07
 - Current tariff appendices
- Please refer to Tariff Appendix B for all Pro Forma Agreements

Application access

Application access request forms and application installation instructions
Guidelines, forms, instructions and policies associated with certificates and related ISO application access.

California ISO Market Results Interface (CMRI)
Focuses on the basic functions of the CMRI application, providing an overview of how to log in, navigate, search, run, and download market data reports.

Open Access Same-time Information System (OASIS)
Overview of the OASIS application. Includes demonstrations on how to run the various reports within OASIS. Describes the differences between the old OASIS and the new one under the MRTU program and how to access the historical OASIS records.

Scheduling Infrastructure Business Rules (SIBR)
Overview of the SIBR application as well as interactive online training. Watch all of the modules consecutively, or use the drop-down menu at the top to navigate through them.

Technical information

SoMC Bill Determinant Matrix - Convergence Bidding 10/18/2010 16:03

QUICKLINKS

- Board
- Business Practice Manuals
- Careers
- Tariff

STAY INFORMED

- Alerts, Warnings and Emergency Notifications Market Notices
- Notification Signups
- Recent Documents

RELATED WEBSITES

- California's Clean Energy Future
- Market Participant Portal
- OASIS

STAY CONNECTED



Registration form for convergence bidding entity agreement

Company specific information requires:

- Full legal name of company and legal street address

Primary and alternate contact information

Authorized representative signature – equivalent to agreement signatory authority



Registration Form for Convergence Bidding Entity Agreement	
<p>To initiate a Convergence Bidding Entity Agreement (CBEA), please complete the information below, sign and email to SCRequests@caiso.com. All information must be complete and accurate before the execution version of the agreement can be prepared.</p>	
<input type="checkbox"/> Full legal name of company	(Please ensure legal spelling of name including capitalization and punctuation and attach a copy of the secretary of state document)
Certified SC with CAISO <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, enter name of Scheduling Coordinator or the date the SC application was submitted for the above company:
Initial SCIDs to be used for Convergence Bidding	
CRR Entity Agreement in place <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, indicate SCIDs to be used in CRR market: (even if no CRRs associated at this time)
Legal street address of company	
City/State/Zip code	
Name of primary representative	
Title	
Company	
Street address (Street address is required with a P.O. Box only as additional information)	
City/State/Zip code	
Email address	
Phone	
Fax	
Name of alternative representative	
Title	
Company	
Street address (Street address is required with a P.O. Box only as additional information)	
City/State/Zip code	
Email address	
Phone	
Fax	
Signature Required	
The undersigned hereby represents and confirms that all information submitted herein is true and accurate to the best of his/her knowledge.	
The undersigned hereby acknowledges that it is the responsibility of the undersigned to provide the CAISO with all confidential and/or proprietary information that is reasonably needed to determine the Convergence Bidding (CB) applicant's eligibility to become a Convergence Bidding Entity (CBE).	
The undersigned further hereby acknowledges that: (i) it is the responsibility of the undersigned to inform the CAISO of any change to any of the information submitted in this Convergence Bidding Registration Form immediately upon learning of any such change; (ii) that this responsibility will continue to apply even after the Applicant becomes a certified CBE; (iii) CASIO reserves the right to reevaluate the applicant in light of the new information; and that (iv) an CBE applicant's failure to promptly notify the CASIO of a change in information may result in termination of the CB Registration Process or revocation of CBE Applicant.	

Affiliate disclosure form

Company Information should match the information provided on the registration form for convergence bidding entity agreement

Company Information

Name	
DUNS#	
Date	
Primary Contact	
Address	
City	
State	
Zip	
Email	
Phone	
Fax	

No	Are you submitting this form to comply with the Scheduling Coordinator affiliate disclosure requirement? If Yes, please provide the information below. Refer to Instructions_SC_Affiliate_RCA tab. If no affiliates in California, then please leave below table blank.
No	Are you submitting this form to comply with the CRR Holder affiliate disclosure requirements? If Yes, please provide the information below. Refer to CRR_CB_Affiliate_Instruction tab. If no affiliates in California, then please leave below table blank.
No	Are you submitting this form to comply with the Convergence Bidding affiliate disclosure requirements? If Yes, please provide the information below. Refer to CRR_CB_Affiliate_Instruction tab. If no affiliates in California, then please leave below table blank.

An Affiliate is an entity, company, or person that directly or indirectly through one or more intermediaries, controls, or is controlled by, or is under common control with the subject entity, company, or person.

Affiliate Information

Affiliate / Remove (A / R) <input type="button" value="v"/>	Affiliate Name <input type="button" value="v"/>
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Registration module summary

- Existing SCs must complete a registration form for convergence bidding entity agreement
- Must submit a copy of the secretary of state document showing the full legal name and address of the company
- Must complete and submit an affiliate form
- Complete and submit a letter for the SC acknowledges the representation of the convergence bidding entity, only if the CB entity is other than the SC itself
- New convergence bidding entities who also want to become a new SCs must go through the existing SC certification process