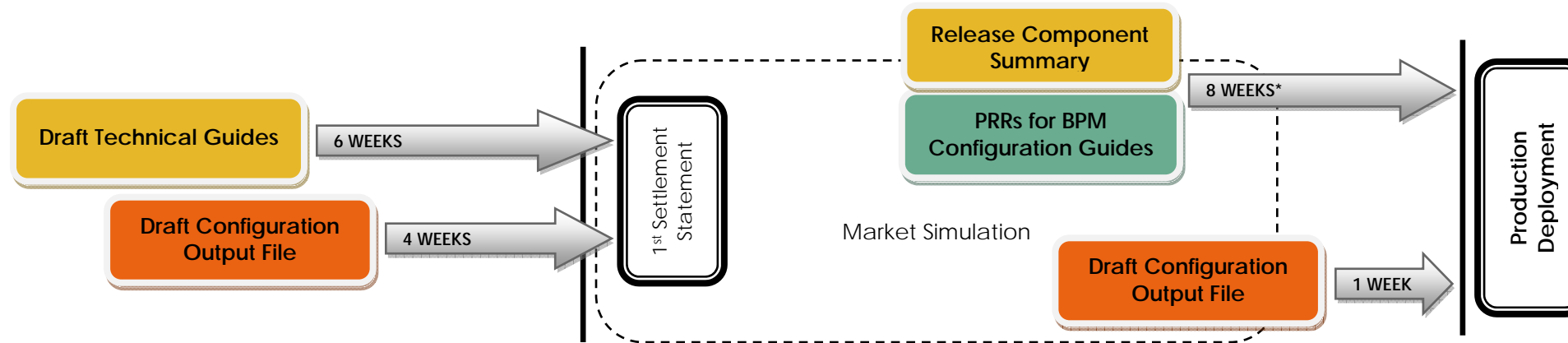


## Settlement Artifact Delivery Milestones & Market Simulation by Release Path

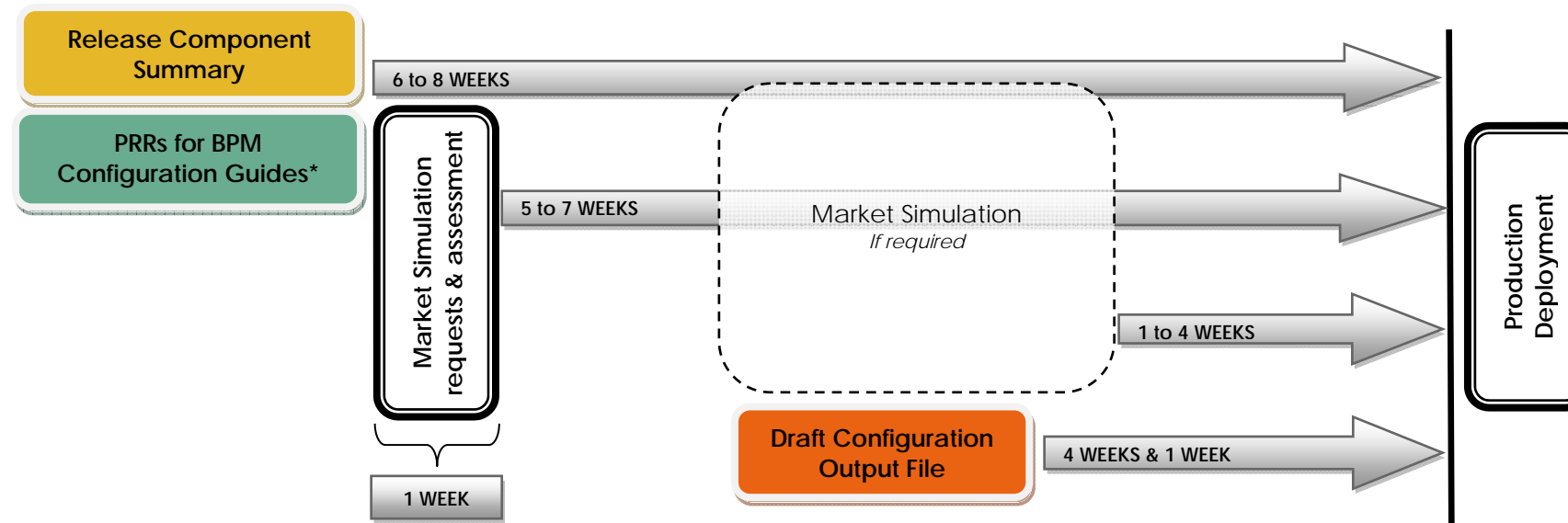
Settlement releases can follow three distinct release paths: a **project path**, a **production path**, and an **emergency path**. Project and production path releases have different artifact delivery milestones, but both types generally target an end-of-quarter production deployment.

**Project path:** For releases which address corporate-wide project initiatives, as well as enhancements and/or defects, the settlement artifact delivery and market simulation activities adhere to published corporate schedules and follow the milestone timelines as indicated below.



- Draft technical guides are provided 6 weeks prior to the 1<sup>st</sup> statement published during market simulation.
- The first draft of the Configuration Output File is provided 4 weeks prior to the 1<sup>st</sup> statement published during market simulation.
- Configuration Output File revisions are provided as needed throughout market simulation and the final draft is provided 1 week before deployment.
- A summary of release components and the PRRs detailing the BPM impacts are provided no later than 8 weeks before production deployment\*.

**Production path:** For releases which address only enhancements and/or defects, artifact delivery and market simulation (if required) occurs as indicated below.



- A summary of release components and the PRRs detailing the BPM impacts are provided at least 6 weeks before production deployment.
- For the 1 week period which follows that communication, stakeholders can request a market simulation through [MarketSim@caiso.com](mailto:MarketSim@caiso.com).
- During that time, the ISO and stakeholders will collaboratively assess the need for a simulation and if required, define simulation scope and timing.
- If simulation is warranted, it will occur 1 to 4 weeks before production deployment.
- Draft Configuration Output Files are provided at 4 weeks and 1 week prior to production deployment.

**Emergency path:** For un-planned releases, settlement artifact delivery occurs as soon as possible. Market simulation is not available as an implementation option and any required BPM content changes will complete the 8 week BPM Change Management cycle as 'emergency' PRRs\*.

\*If the BPM Change Management cycle cannot complete its full 8 week duration before the associated BPM content change becomes effective (which occurs at production deployment), then the associated PRR is categorized as an 'emergency'. An 'emergency' PRR for a BPM Configuration Guide does not mean the release is on the emergency path. An 'emergency' PRR can occur as part of **any** settlement release path: project, production or emergency.