BPM Change Management Meeting

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July 28, 2026

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Please keep all comments professional and respectful.

Instructions for raising your hand to ask a question

- If you joined audio through your computer or used the “Call Me” option, please use the **Raise Hand** icon located at the bottom center of the Webex screen to join the question queue.
- If you are not logged into Webex and joined by phone only, please dial ***3** to enter the queue.
- When it is your turn to speak, please state your name and affiliation before making your comment.
- For technical assistance during the meeting, please send a chat message to the event producer.

Agenda: BPM Change Management Meeting – July 28, 2026

Topic	Presenter
Introduction / Meeting Overview	Joseph Williamson-Duffney
Direct Telemetry	Priyanka Namburi
Generator Management	Jill Jordan
Market Instruments	Michael Martin
Market Operations	Michael Martin
Outage Management	Licheng Jin
Reliability Requirements	Melanie Bogen
Scheduling Coordinator Certification and Termination	Ryan Ayer
Settlements and Billing	Massih Ahmadi
Wrap-Up and Next Steps	Joseph Williamson-Duffney

BPM Change Management Process
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California ISO Stakeholder Initiative Process

- Business Practice Manuals
  - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
  - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
    - Policy changes submitted though the PRR process will be referred to the policy initiative road map process.
  - Each subject area in a BPM is based on enabling language in the ISO tariff.
    - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

BPM for Direct Telemetry

PRR	PRR Title	Stage
1679	Updates to battery point definitions	Recommendation

PRR 1679 – Updates to battery point definitions

- Reason for revision:
  - Updates to battery point definitions to add clarity to the Instantaneous State Of Charge (SOC) and Maximum Continuous Energy limit.
  - A new Telemetry point added – Minimum Continuous Energy Limit.
- Recommendation comments received:
  - 7/16/2026, By Alan Meck (Pacific Gas & Electric)
- Recommendation comment period expired: July 15, 2026
- Next step: Post ISO Final Decision

BPM for Generator Management

PRR	PRR Title	Stage
1683	Commercial operation for markets and other clarification, and general document cleanup	Initial

PRR 1683 – Commercial operation for markets and other clarification, and general document cleanup

- Reason for revision:
  - Clarification regarding the applicability of commercial operation for markets, clarification regarding facilities reassessments, and other general document cleanup.
- Initial comments received:
  - 7/10/2026, By Susan R. Schneider (LSA)
  - 7/15/2026, By Bonnie Blair (Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA)
- Initial comment period expired: July 15, 2026
- Next step: Post ISO Recommendation

BPM for Market Instruments

PRR	PRR Title	Stage
1685	Addition of extended day ahead market balancing authority area aggregated transfers open access same time information system report	Initial
1686	Shift factor report updated to reflect the new deployment scenario column / attribute added by the extended day-ahead market	Initial
1691	Adding references back to market ops BPM on circular scheduling	Initial

PRR 1685 – Addition of extended day ahead market balancing authority area aggregated transfers open access same time information system report

- Reason for revision:
  - This new report displays Extended Day Ahead Market (EDAM) aggregated transfer quantities by Balancing Authority Area (BAA), categorized by commodity type (Energy, Reliability Capacity Up (RCU), and Reliability Capacity Down (RCD).

- Initial comments received: None

- Initial comment period expired: July 15, 2026

- Next step: Post ISO Recommendation

PRR 1686 – Shift factor report updated to reflect the new deployment scenario column / attribute added by the extended day-ahead market

- Reason for revision:
  - Clarifies Deployment Scenario report column
    - A: is for base case
    - U: is for deployment scenario up
    - D: is for deployment scenario down

- Initial comments received: None

- Initial comment period expired: July 15, 2026

- Next step: Post ISO Recommendation

PRR 1691 – Adding references back to market ops BPM on circular scheduling

- Reason for revision:
  - Adds references back to the Market Ops BPM sections 8.4.4 and Appendix Attachment H
  - This PRR was submitted July 24, 2026. However, the PRR will align with the comment periods for the August/September series of meetings.
- Initial comments received: None
- Initial comment period expires: August 18, 2026
- Next step: Initial Stakeholder Meeting

BPM for Market Operations

PRR	PRR Title	Stage
1678	Clarification on how storage resources are subject to ancillary service state of charge constraints and envelope constraints	Recommendation
1682	Updates to the admin pricing process for the market separation or isolation of the western energy imbalance market or extended day-ahead market	Initial
1690	Clarification on tagging MWs back into CAISO BA from a non-contiguous portion of CAISO BA	Initial

PRR 1678 – Clarification on how storage resources are subject to ancillary service state of charge constraints and envelope constraints

- Reason for revision:
  - This update details how State of Charge (SOC) constraints in Day Ahead ensure adequate SOC to cover all energy, ancillary services, and capacity products in each hour and how in Real Time SOC constraints ensure sufficient SOC to cover all energy, ancillary services, and flexible ramping awards in each interval.

- Recommendation comments received: None

- Recommendation comment period expired: July 15, 2026

- Next step: Post ISO Final Decision

PRR 1682 – Updates to the admin pricing process for the market separation or isolation of the western energy imbalance market or extended day-ahead market

- Reason for revision:
  - This PRR clarifies actions that must be taken by entities affected by a market disruption to ensure timely and proper settlement.
- Emergency PRR:
  - This PRR has an effective date of June 15, 2026. However, the PRR will align with the comment periods for the July/August series of meetings.
- Initial comments received:
  - 7/15/2026, By Bonnie Blair (Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA)
- Initial comment period expired: July 15, 2026
- Next step: Post ISO Recommendation

PRR 1690 – Clarification on tagging MWs back into CAISO BA from a non-contiguous portion of CAISO BA

- Reason for revision:
  - Clarification that separate tags are required for importing MWs back into CAISO BA from a non-contiguous portion of CAISO BA.
  - This PRR was submitted July 24, 2026. However, the PRR will align with the comment periods for the August/September series of meetings.
- Initial comments received: None
- Initial comment period expires: August 18, 2026
- Next step: Initial Stakeholder Meeting

BPM for Outage Management

PRR	PRR Title	Stage
1677	Clarify outage reporting requirements for non-generator resources and add storage-related cause descriptions to the plant trouble nature of work category	Recommendation

PRR 1677 – Clarify outage reporting requirements for non-generator resources and add storage-related cause descriptions to the plant trouble nature of work category

- Reason for revision:
  - The present PRR includes two revisions to the Outage Management BPM. The first of these revisions seeks to clearly establish reporting requirements for availability changes non-generator resources may experience, ensuring accurate and timely availability information. The second revision seeks to add storage-related causes to the nature of work table in the Outage Management BPM so as to ease outage reporting in an adequate fashion.
- Recommendation comments received: None
- Recommendation comment period expired: July 15, 2026
- Next step: Post ISO Final Decision

BPM for Reliability Requirements

PRR	PRR Title	Stage
1684	Resource transitions from inside to outside the ISO balancing authority area	Initial

PRR 1684 – Resource transitions from inside to outside the ISO balancing authority area

- Reason for revision:
  - Continuation in accreditation for existing Resource Adequacy (RA) contracts with Full Capacity Deliverability Status (FCDS) or Partial Capacity Deliverability Status (PCDS) resources moved out of the ISO Balancing Authority Area (BAA) by a change in ISO BAA boundary.
- Emergency PRR:
  - This PRR has an effective date of June 29, 2026. However, the PRR will align with the comment periods for the July/August series of meetings.
- Initial comments received:
  - 7/15/2026, By Bonnie Blair (Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA)
- Initial comment period expired: July 15, 2026
- Next step: Post ISO Recommendation

BPM for Scheduling Coordinator Certification and Termination

PRR	PRR Title	Stage
1675	Clarifying 24/7 real time phone number and testing requirements	Recommendation

PRR 1675 – Clarifying 24/7 real time phone number and testing requirements

- Reason for revision:
  - Updating and adding clarifications around the 24/7 real time phone number.

- Emergency PRR:
  - This PRR has an effective date of May 25, 2026. However, the PRR will align with the comment periods for the June/July series of meetings.

- Recommendation comments received: None

- Recommendation comment period expired: July 15, 2026

- Next step: Post ISO Final Decision

BPM for Settlements and Billing

PRR	PRR Title	Stage
1673	Emergency day-ahead market enhancement and extended day-ahead market incremental updates to PRR 1662	Recommendation
1674	Emergency settlement fixes for high priority variances	Recommendation
1680	Emergency day-ahead market enhancement and extended day-ahead market fixes for high priority variances	Initial
1681	Emergency settlement release to fix congestion revenue allocation related congestion calculations	Initial
1687	Emergency settlement release to fix high priority settlement variances	Initial
1689	Emergency settlement release to fix high priority settlement variances	Initial

PRR 1673 – Emergency day-ahead market enhancements and extended day-ahead market incremental updates

- Reason for revision:
  - This Emergency PRR captures Settlements incremental updates from PRR 1662 because of the day-ahead market enhancements and extended day-ahead market initiatives.
- Emergency PRR:
  - This PRR has an effective date of May 1, 2026. This PRR was brought to the May BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the June/July series of meetings.
- Recommendation comments received: None
- Recommendation comment period expired: July 15, 2026
- Next step: Post ISO Final Decision

Impacted Charge Codes *(details here)*		
374	284	491
495	4515-16	4567
6011	6013	6473
6476-79	6637	6700
6788	6985	7070
7081	7256	7266
8011	8071	8076
8080	8086	8088
8310	8315	8404
8411	8470	8704
8800	8806	8810-11
8816-17	64600	64740
64750	64770	6476 (retro)
Ten PCs	Attachment B	

PRR 1674 – Emergency settlement fixes for high priority variances

- Reason for revision:
  - This emergency PRR captures settlements changes associated with high priority variances from implementation of the day-ahead market enhancements and extended day-ahead market initiatives.

- Emergency PRR:
  - This PRR has an effective date of May 1, 2026. This PRR was brought to the May BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the June/July series of meetings.
- Recommendation comments received: None
- Recommendation comment period expired: July 15, 2026
- Next step: Post ISO Final Decision

Impacted Charge Codes
64600 FNM Instructed Imbalance Energy EIM Settlement
8080 Resource Sufficiency Evaluation Settlement
PC Real Time Price
PC Wheel Export Quantity

PRR 1680 – Emergency day-ahead market enhancement and extended day-ahead market fixes for high priority variances

- Reason for revision:
  - This Emergency PRR captures Settlements changes associated to high priority variances from implementation of Day-Ahead Market Enhancement (DAME) and Extended Day-Ahead Market (EDAM).
- Emergency PRR:
  - This PRR has an effective date of May 1, 2026. This PRR was brought to the June BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the July/August series of meetings.
- Initial comments received: None
- Initial comment period expired: July 15, 2026
- Next step: Post ISO Recommendation

Impacted Charge Codes
7088 Monthly Flexible Ramp Down Uncertainty Award Allocation
8077 Day Ahead Imbalance Reserve Up Tier 2 Allocation
PC Flexible Ramp Product
PC Real Time Energy Quantity
PC RTM Net Amount

PRR 1681 – Emergency settlement release to fix congestion revenue allocation related congestion calculations

- Reason for revision:
  - This Emergency PRR captures Settlements changes associated to fix Congestion Revenue Allocation (CRA) related congestion calculations.
- Emergency PRR:
  - This PRR has an effective date of May 1, 2026. This PRR was brought to the June BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the July/August series of meetings.
- Initial comments received: None
- Initial comment period expired: July 15, 2026
- Next step: Post ISO Recommendation

Impacted Charge Codes
8470 Real Time Energy Transfer Revenue Settlement
PC Day Ahead Congestion
PC Real Time Congestion

PRR 1687 – Emergency settlement release to fix high priority settlement variances

- Reason for revision:
  - This Emergency PRR captures Settlements changes associated to fixes for high priority variances.
  - Emergency PRR:
    - This PRR has an effective date of May 1, 2026. This PRR was brought to the July BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the August/September series of meetings.
    - These changes were implemented on 7/9/2026
- Initial comments received: None
- Initial comment period expires: August 18, 2026
- Next step: Initial Stakeholder Meeting

Impacted Charge Codes *(details here)*
384 High Voltage Wheeling Revenue Payment
6473 Convergence Bidding Real Time Energy Congestion and Loss Settlement
8076 Day Ahead Imbalance Reserve Up Tier 1 Allocation
8086 Day Ahead Imbalance Reserve Down Tier 1 Allocation
64750 Real Time Uninstructed Imbalance Energy EIM Settlement
Pre-Calculation - Real Time Energy Quantity
Pre-Calculation - Wheel Export Quantity
Pre-Calculation - Wheel Export Quantity
8470 Real Time Energy Transfer Revenue Settlement
PC Day Ahead Congestion
PC Real Time Congestion

PRR 1689 – Emergency settlement release to fix high priority settlement variances

- Reason for revision:
  - Emergency settlement release to fix high priority settlement variances
- Emergency PRR:
  - This PRR has an effective date of May 1, 2026. However, the PRR will align with the comment periods for the August/September series of meetings.
  - These changes were implemented on 7/22/2026
- Initial comments received: None
- Initial comment period expires: August 18, 2026
- Next step: Initial Stakeholder Meeting

Impacted Charge Codes
64750 Real Time Uninstructed Imbalance Energy EIM Settlement

REGISTRATION IS OPEN

2026 STAKEHOLDER SYMPOSIUM

Welcome reception - Oct. 5
at Kimpton Sawyer Hotel, Sacramento, CA

Symposium program - Oct. 6
SAFE Credit Union Convention Center
Sacramento, CA

Visit: https://www.caiso.com/meetings-events/events/stakeholder-symposium

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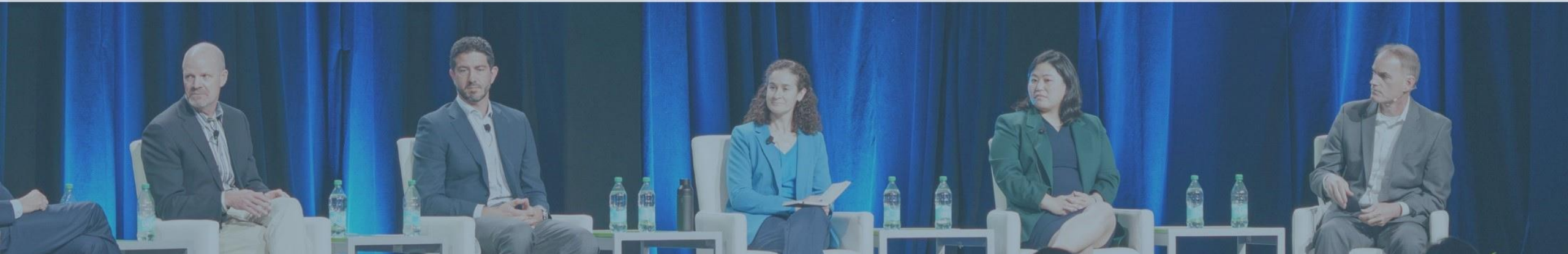

Next BPM Change Management Meeting: Aug. 25, 2026, 11:00 AM PT

BPM change management process

The ISO systematic and publicly transparent BPM Change Management process ensures the consideration of all relevant information when modifying BPMs. The change management process uses a system available through the ISO public website that provides a way to propose BPM changes, comment on open change requests, and track proposed change requests. The change management process begins when the ISO or a stakeholder submits a web-based Proposed Revision Request (PRR). After an ISO review for completeness, PRRs are posted to the website, triggering a stakeholder review and comment period.

1. **Submit Proposed Revision Request (PRR)**
2. **Comments period**
   Upon ISO acceptance, PRR becomes public and 10-business day comment period starts
3. **Stakeholder meeting**
   PRR details and comments reviewed and discussed
4. **Recommendation**
   ISO recommendation issued on PRR
5. **Comments on recommendation**
   10-business day comment period open on recommendation
6. **Stakeholder meeting on recommendation**
   PRR recommendation and comments reviewed
7. **Final decision***
   BPM updated or not updated

*Stakeholders have the right to appeal the final decision of a proposed revision request (PRR)

Direct BPM change management process questions to:
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