



California ISO

Settlement User Group

Jan 15, 2025

10:00 a.m. – 11:00 a.m. (Pacific Time)

Web Conference Information	Conference Call Information
<p>Web Address: https://caiso.webex.com/meet/settlementuser</p> <p>Meeting Number: 961 854 046</p> <p>Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter your phone number you will use during the call.</p>	<p>US Toll Free: 1-844-621-3956</p> <p>US Toll : 1- 650-479-3208</p> <p>Access Code: 961 854 046</p>
<p>Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publically available on the ISO web page for a limited time following the meeting. The recording, and any related transcriptions, should not be reprinted without the ISO's permission. Hyperlinks in blue in PDF version.</p> <p>The recording will be posted on our website and be available for a short period of time until January 29th, 2025. Please mute your phone while the discussion is going on in order to eliminate background noise, to unmute press and hold the spacebar to temporarily unmute, double mute. Calls are structured to stimulate an honest dialogue and engage different perspectives.</p> <p>To ask a question after each topic, unmute yourself before asking your question, or enter question on the chat</p> <p>please state your name and affiliation. Thank you.</p>	



[mute](#)

Settlement User Group Agenda

Wednesday, Jan 15, 2025

10:00 a.m. – 11:00 a.m. (Pacific Time)

Time	Topic	Presenter
▪ 10:00 – 10:02	▪ Welcome and Introduction	▪ Massih Ahmadi
▪ 10:02 – 11:00	▪ Settlements	
	▪ Follow-up Item	▪ Massih Ahmadi
	▪ Update to Jan 2025 Emergency Release	▪ Massih Ahmadi
	▪ DAME/EDAM Tech Doc Update	▪ Massih Ahmadi
	▪ RC Services	▪ Elise Yohpe
	▪ Upcoming Change: BA_ID List Expansion	▪ Nathaniel Brown

Follow-up from previous SUG call

- Request for a separate meeting for Advisory Shutdown
 - After further internal discussion, Policy Roadmap is right forum for policy changes
 - Please place your comment regarding Advisory Shutdown on Policy Roadmap at stakeholdercenter.caiso.com

Update to Jan 2025 Emergency Settlement Release

- Removed AET (PRR 1607) defects from this release and currently this is in process of internal discussion with other teams, not clear this will be a defect at this point.
 - ~~Assistance Energy Transfer (AET)~~ — ~~Retroactive Effective Date: 7/1/2023~~
 - Advisory Shutdown MLC Disqualification - *Retroactive Effective Date: 8/1/2024*
 - Negative Generic Availability for LESR RA – *Retroactive Effective Date: 3/1/2023*
- BPMs/PRRs:
 - PRR 1606 - Advisory Shutdown
 - PRR 1608 - RAAIM
- Deployed to Production: 1/8/2025

RAAIM Impacts

- Effective Date: **3/1/2023 (retro to T+24M)**
- Deployment Date : **1/8/2025 (Jan 2025 Emergency release)**

Settlement Statements	Tentative Start Trade Date
T+9B	12/27/2024
T+70B	10/7/2024
T+11M	2/21/2024
T+21M	4/17/2023
T+24M	3/1/2023 (to be done weeks later)

- Note also that since RAAIM is a monthly Charge Code, in order to get fully accurate monthly values, all dailies should have been run using new code.

DAME/EDAM – Tech Doc Update

- We are on schedule to post updates to Tech Docs (tiers 1-3) by **1/30/25**
 - Most previous Tech Docs will be updated
 - This update will include new Tech Docs which were not part of tiers 1-3
 - This update includes a Doc format change per CAISO website posting requirement, all posted tech doc files will be in docx format (previously it's doc format). We will provide a list with only doc format changes, all the others have content changes for Tech Docs.
- 1st DAME/EDAM Config Output File is scheduled for **4/29/25**, together with another round of updated Tech Doc posting.

RC Services

RC Services Assessment Year 2025:

- External RC West Informational Submittal Window – 09/01/24 – 09/30/24
- RC West Informational Statement:
 - Publishes: 10/30/24
 - RC Customer Validation & External RC Customer Resubmittal Period Ends: 11/30/24
- RC West Initial/Recalculation Statement & Invoice
 - 2025 Initial & 2024 Recalculation Publishes: 01/02/25
 - Payment Due: 02/03/24
- RC West Payment Calendar:
<http://www.caiso.com/Documents/RCWestAnnualPaymentsCalendar.pdf>

RC West Initial and Recalculation Statement and Invoice Published January 2, 2025

- RC West has published the Reliability Coordinator (RC) Services Initial and recalculation statements and invoices for the period provided below to the Market Results Interface-Settlements (MRI-S) and the Secure File Transfer Protocol (SFTP) server on **Jan. 2, 2025**.

Statement	Bill Period
RC Services Initial	1/1/2025 - 12/31/2025
RC Services Recalculation	1/1/2024 - 12/31/2024

- The above RC Services statement and invoice files can be retrieved in MRI-S under the Reliability Coordination tab by selecting RC Services Initial, RC Services Recalc, or RC Services Invoices as the file types and setting the post date to Jan. 2, 2025.
- Statement and invoice file sets are available on MRI-S and SFTP for 45 calendar days after publication. RC Customers are advised to download the files for validation purposes and future reference.
- Payments for the invoices are due no later than 10 a.m. (Pacific Time) on **Feb. 3, 2025**.



Upcoming Change: BA_ID List Expansion

Nathaniel “Nat” Brown *Customer Readiness, CAISO*
Hewayda Ahmed *Resource Management, CAISO*

1/15/25

Upcoming Change: BA_ID Numeric Expansion

Business Associate Identifier (BA_ID) list is expanding from 4 digits to allow 5 digits

- This will only impact **new** BA_IDs
- Existing BA_IDs with four digits remain as-is
 - We are not adding a 0 to existing BA_IDs
 - Ex. 4444 would remain instead of being converted to 04444

Request for feedback by next SUG meeting 1/29/25

- If you use a third party program or other non-CAISO application to download settlement statements, bill determinant files, or other settlement files from MRI-S we request that you test this change to ensure your systems will accept 5-digit BA_ID values and alert us of any possible issues

Next SUG Meeting: January 29th, 2025 at 10:00 A.M



2025

Settlement User Group Meetings

Note: dates subject to change; for the latest information please visit the Calendar on www.caiso.com

January						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February						
Su	Mo	Tu	We	Th	Fr	Sa
						1
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March						
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30	31					

April						
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27	28	29	30			

May						
Su	Mo	Tu	We	Th	Fr	Sa
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18	19	20	21	22	23	24
25	26	27	28	29	30	31

June						
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29	30					

July						
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27	28	29	30	31		

August						
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31						

September						
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28	29	30				

October						
Su	Mo	Tu	We	Th	Fr	Sa
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26	27	28	29	30	31	

November						
Su	Mo	Tu	We	Th	Fr	Sa
						1
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30						

December						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

 Meeting

Settlement User Group

Thank you for participating in our call
