



California ISO

Settlement User Group

July 8, 2026

10:00 a.m. – 11:30 a.m. (Pacific Time)

Web Conference Information	Conference Call Information
Web Address: https://caiso.webex.com/meet/settlementuser Meeting Number: 961 854 046 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.	US Toll Free: 1-844-621-3956 US Toll : 1- 650-479-3208 Access Code: 961 854 046
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. The recording will be posted on our website and be available for a short period of time until July 8th, 2026. 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. To ask a question after each topic, unmute yourself before asking your question, or enter question on the chat please state your name and affiliation. Thank you.	



[mute](#)

Settlement User Group Agenda

Wednesday, July 8, 2026

10:00 a.m. – 11:30 a.m. (Pacific Time)

Time	Topic	Presenter
▪ 10:00 – 10:02	▪ Welcome and Introduction	▪ Tyler DuBeshter
▪ 10:02 – 11:30	▪ Settlements	
	▪ Meeting Duration and Extra SUG	▪ Tyler DuBeshter
	▪ Planned Production Release Update	▪ Tyler DuBeshter
	▪ Follow-up - Dispute Deadline Extension	▪ Mike Turner
	▪ Follow-up – Consolidated Settlement Issues List	▪ David Luk
	▪ Settlement BPM Update	▪ Tyler DuBeshter
	▪ ISO Training Schedule	

Follow-up – Increase Meeting Duration

- **Recent requests to increase meeting duration**
 - In response to recent requests for additional meeting time:
 - We have extended the duration of the July 1 and July 15 Settlement User Group (SUG) calls to 10:00 – 11:30 am PDT.
 - Additionally, we have scheduled an off-cycle SUG call on July 8 from 10:00–11:30 am PDT.
 - ISO calendar has been updated
 - External notification was sent on 6/30/26 at 10:48AM PDT.

Planned Settlement Releases

Planned Stage Settlement Releases:

- Stage Promotion on **July 7th, 2026**
- Settled TD's with new configuration starting 6/30 Initial and Recalc

Planned Production Settlement Releases:

- We have moved end of June release to **July 8th, 2026**.
 - This release will include defect fixes and/or enhancement in Production (*discussed on 6/17 & 7/1 SUG calls*).
 - An emergency PRR will be created once the release is in Production.

July 8th Planned Production Settlement Release

Additional Inclusion for 7/8 Production Settlement Release:

- CC 384 Non-subscriber generation quantity not calculating for SPTO, and null BA_ID attribute created incorrectly for CC 384 and 374
 - **Issue:**
 - CC 384 Non-subscriber generation quantity not calculating for SPTO, and null BA_ID attribute incorrectly created for CC 384 and 374 settlement due to SPTO intertie allocation amount
 - **Impact (CC):**
 - Currently, no financial impact due to zero rates for SPTO, but the values reported are incorrect. Direct impact to Wheel Export PC, and CC 384 both of which will have BPM change, and indirect impact to CC 374 with no BPM change.
 - **Resolution:**
 - Update mapping for generation subscriber quantity to link resource to the SPTO, update existing and create new formulas to fix SPTO generation and intertie allocation amount.
 - Trade dates impacted: Retro to TD 10/1/2025
 - CISO only

Dispute Deadline Extension

- **Dispute Deadline Extension**

- CAISO to file a Tariff Waiver
 - Section 11.29.8.2(v) = A dispute must be submitted no later than 22 business days after date of issuance.
- Will cover May **and June** 2026 Trade Dates
 - Both Daily and Monthly
- Waiver End = ~~TBD~~ **12/24/26**
 - CIDI to be updated to allow disputes through the waiver period.

Consolidated EDAM Issues List

Purpose	During the last SUG, market participants requested a consolidated list of Settlement issues in an Excel format to facilitate analysis and testing.
Creation	CAISO has captured settlement issues from prior SUG from 6/17, 6/10, 6/3, 5/20, and 5/6 into a consolidated list.
Forum	Leverage existing forum to present this information: • SUG - focus on Settlements / Disputes • Market Issues Forum - focus on issues that impact Settlements for upstream systems
Fields	• Title, Description • CC Impact, Status, Resolution • Impacted TD, Impacted BAA • Production Deployment Date, PRR • Status & Next steps notes
Next steps	• Populate Impacted BAA, Impacted TD, Production Date, PRR • Provide a sample and seek feedback from Market Participants on additional information needs

BPM Update

- **PRR 1673:** Go-live release - Incremental update to PRR 1662 (DAME + EDAM framework)
 - May/June/July monthly BPM calls
 - We are finalizing our response to comments
- **PRR 1674:** 5/22 release - Fixes for high priority variances
 - May/June/July monthly BPM calls
 - Our response to comments was provided on 6/18/26 at 8:55am
- **PRR 1680:** 6/3 release - fixes for high priority variances
 - June/July/August monthly BPM calls
- **PRR 1681:** 6/8 release - fix congestion revenue allocation related congestion calculations
 - June/July/August monthly BPM calls
- Link to BPM Change Management where you can obtain latest BPMs associated to each PRR
 - <https://bpmcm.caiso.com/>

ISO Training Schedule

Training Course	Date and time
Pre Market-Simulation Training: Inter-SC Trades (EDAM Enhancements 2026)	July 7th, 2026 9:00 am - 10:00 am PDT

Use our [Pre-Training Release Survey](#) to submit topics that you would like to see covered in the upcoming training.

Are you looking for more training?

The ISO Training Center has computer based training available for lots of topics. Check out the Learning Center: <https://www.caiso.com/stakeholder/training>



Next SUG Meeting: July 15th, 2026 at 10:00 A.M



2026

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
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February						
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March						
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April						
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May						
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31						

June						
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July						
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August						
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September						
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October						
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November						
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29	30					

December						
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20	21	22	23	24	25	26
27	28	29	30	31		

 **SUG Meeting**

Settlement User Group

Thank you for participating in our call
