



California ISO

Settlement User Group

June 4, 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 June 18th, 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, June 4, 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 from last call - Training Schedule for DAME, EDAM and EDAM ISO BAA | ▪ Heidi Carder |
| | ▪ Next round of Draft Tech Docs update | ▪ Massih Ahmadi |
| | ▪ NERC/WECC Information Statement | ▪ Derek Lee |

Spring 2026 – ISO Led Training Schedule for DAME, EDAM and EDAM ISO BAA Participation Rules

| Date | Activity | Target Audience |
|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| June 2025 (Rescheduled from April by EDAM entity request) | EDAM Onboarding: Train-the-Trainer Sessions <ul style="list-style-type: none"> June 23 – 26, 2025 | EDAM entity designated trainers (closed sessions for onboarding entities only) |
| August 18, 2025 (tentative date – target is 1-2 weeks before market sim) | Day-Ahead Market: Enhancements and Extension <ul style="list-style-type: none"> This training covers the market-related changes for DAME, EDAM, and EDAM ISO BAA Participation Rules | ISO BA customers that participate in the Day-Ahead Market; EDAM Scheduling Coordinators |
| August 20, 2025 (tentative date – target is 1-2 weeks before market sim) | Settlements Impacts of Day-Ahead Market Enhancements and Extension <ul style="list-style-type: none"> This training covers the settlements-related impacts for DAME, EDAM, and EDAM ISO BAA Participation Rules | ISO BA customers that participate in the Day-Ahead Market; EDAM Scheduling Coordinators |
| [Market Simulation Activity] | | |
| April 2026 (date TBD – target is 1-2 weeks before go-live) | Refresher Training: Day-Ahead Market: Enhancements and Extension <ul style="list-style-type: none"> This training covers the market-related changes for DAME, EDAM, and EDAM ISO BAA Participation Rules | ISO BA customers that participate in the Day-Ahead Market; EDAM Scheduling Coordinators |
| April 2026 (date TBD – target is 1-2 weeks before go-live) | Refresher Training: Settlements Impacts of Day-Ahead Market Enhancements and Extension <ul style="list-style-type: none"> This training covers the settlements-related impacts for DAME, EDAM, and EDAM ISO BAA Participation Rules | ISO BA customers that participate in the Day-Ahead Market; EDAM Scheduling Coordinators |
| May 1, 2026: DAME, EDAM, EDAM ISO BAA Participation Rules – Production Activation | | Rev. 5/29/2025 |

Spring 2026 – DAME/EDAM/EDAM ISO BAA PR – Settlements Draft Tech Docs update

- We are on track to provide the following by COB **8/29/25**:
 - ***Fourth round of updates to Draft Tech Docs &***
 - ***Second Draft Configuration Output File***

| Release Artifact | Schedule |
|-----------------------------------------------------------------------|-------------------------|
| First Draft Technical Documents | 8/26/2024 - Completed |
| Second Draft Technical Documents | 1/30/2025 - Completed |
| Draft of DAME and EDAM Charge Code Change Summary with Tariff Mapping | 3/19/2025 - Completed |
| Third Draft Technical Documents | 4/29/2025 - Completed |
| First Draft Configuration Output File + Draft Release Artifacts | 4/29/2025 - Completed |
| Fourth Draft Technical Documents | 8/29/2025 – on schedule |
| Second Draft Configuration Output File | 8/29/2025 – on schedule |
| Pre-Production Configuration Output File + Final Release Artifacts | 1/12/2026 |
| Production Deployment | 2/1/2026 |
| Production Activation | 5/1/2026 |

NERC/WECC Information Statement

- The California ISO will post North American Electric Reliability Corporation/Western Electricity Coordinating Council (NERC/WECC) information files to the Market Results Interface - Settlements (MRI-S) and the Secure File Transfer Protocol (SFTP) server on June 5, 2025. The files contain the 2024 NERC/WECC metered demand for assessment year 2026 for scheduling coordinator (SC) review, pursuant to ISO tariff section 11.20.4(a).
- Information files can be retrieved in MRI-S by selecting NERC WECC INFO as the run type and setting the post date to 06/05/2025. The files are available on MRI-S and SFTP for 45 calendar days after publication.

NERC/WECC Information Statement

| Item | Value | Unit |
|----------------------------------------------------------------------|----------------|--------|
| Total NERC/WECC Metered Demand for Calendar Year 2024 | 210,313,928.16 | MWh |
| Estimated Preliminary NERC/WECC Charge Rate for Assessment Year 2026 | 0.066628042 | \$/MWh |

- 2024 NERC/WECC metered demand is the summation of monthly NERC/WECC metered demand quantities published previously in the T+11M recalculation statements for January 2024 through June 2024, and T+70B recalculation statements for July 2024 through December 2024. Details regarding assessment of Charge Code 6490 NERC/WECC Charge are provided in the Settlements and Billing Business Practice Manual (BPM) configuration guide
- Beginning June 5, 2025, each SC will have 60 calendar days to raise any disputes concerning the data calculation.

Next SUG Meeting: June 18th, 2025 at 10:00 A.M





California ISO

2025

Settlement User Group Meetings

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

| January | | | | | | |
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| February | | | | | | |
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| June | | | | | | |
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| November | | | | | | |
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| December | | | | | | |
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| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

 Meeting

Settlement User Group

Thank you for participating in our call
