

# Settlement User Group

June 4, 2025

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

Web Conference Information	Conference Call Information
Web Address: <u>https://caiso.webex.com/meet/settlementuser</u> Meeting Number: 961 854 046 Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and	US Toll Free: 1-844-621-3956 US Toll : 1- 650-479-3208
enter your phone number you will use during the call.	Access Code: 961 854 046
Calls and webinars are recorded for stakeholder convenience, allowing those after the meetings. The recordings will be publically available on the ISO we recording, and any related transcriptions, should not be reprinted without the	b page for a limited time following the meeting. The
The recording will be posted on our website and be available for a short period	od of time until June 18 <sup>th</sup> , 2025. Please mute your phone
while the discussion is going on in order to eliminate background noise, to u	nmute press and hold the spacebar to
temporarily unmute, double mute. Calls are structured to stimulate an hones	st dialogue and engage different perspectives.
To ask a question after each topic, unmute yourself before asking your question	stion, or enter question on the chat
please state your name and affilia	tion. Thank you.



## Settlement User Group Agenda

Wednesday, June 4, 2025

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

Presenters

Time	Торіс	Presenter
<ul> <li>10:00 – 10:02</li> </ul>	<ul> <li>Welcome and Introduction</li> </ul>	Massih Ahmadi
<ul> <li>10:02 – 11:00</li> </ul>	<ul> <li>Settlements</li> <li>Follow-up from last call - Training Schedule for DAME, EDAM and EDAM ISO BAA</li> <li>Next round of Draft Tech Docs update</li> <li>NERC/WECC Information Statement</li> </ul>	<ul> <li>Heidi Carder</li> <li>Massih Ahmadi</li> <li>Derek Lee</li> </ul>



## 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)	<ul> <li>EDAM Onboarding: Train-the-Trainer Sessions</li> <li>June 23 – 26, 2025</li> </ul>	EDAM entity designated trainers (closed sessions for onboarding entities only)
August 18, 2025 (tentative date – target is 1-2 weeks before market sim)	<ul> <li>Day-Ahead Market: Enhancements and Extension</li> <li>This training covers the market-related changes for DAME, EDAM, and EDAM ISO BAA Participation Rules</li> </ul>	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)	<ul> <li>Settlements Impacts of Day-Ahead Market Enhancements and Extension</li> <li>This training covers the settlements-related impacts for DAME, EDAM, and EDAM ISO BAA Participation Rules</li> </ul>	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)	<ul> <li>Refresher Training: Day-Ahead Market: Enhancements and Extension</li> <li>This training covers the market-related changes for DAME, EDAM, and EDAM ISO BAA Participation Rules</li> </ul>	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)	<ul> <li>Refresher Training: Settlements Impacts of Day-Ahead Market</li> <li>Enhancements and Extension</li> <li>This training covers the settlements-related impacts for DAME, EDAM, and EDAM ISO BAA Participation Rules</li> </ul>	ISO BA customers that participate in the Day-Ahead Market; EDAM Scheduling Coordinators
	May 1, 2026: DAME, EDAM, EDAM ISO BAA Participation Rules – Production	on 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 <u>8/29/25</u>:
  - 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	<mark>8/29/2025</mark> – on schedule
Second Draft Configuration Output File	<mark>8/29/2025</mark> – 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.



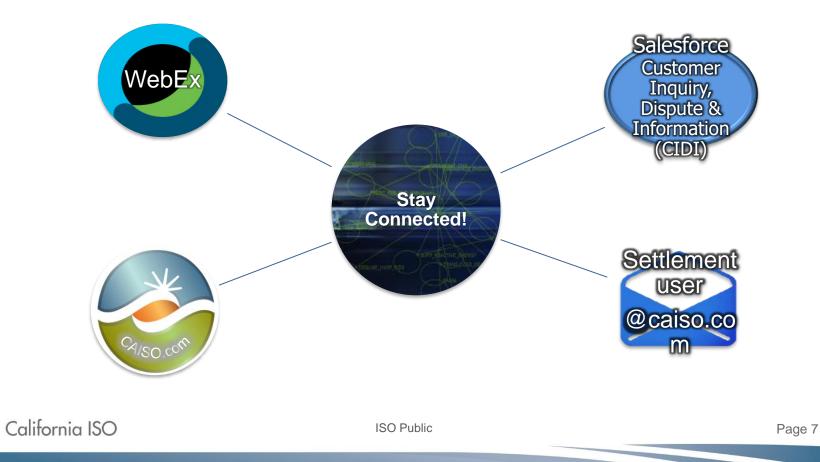
### **NERC/WECC** Information Statement

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 18<sup>th</sup>, 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						
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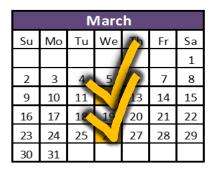
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July							
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December						
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21	22	23	24	25	26	27
28	29	30	31			

Meeting

# Settlement User Group

## Thank you for participating in our call

