




California ISO

Parallel Operations Plan Spring 2026 Release

**Day Ahead Market Enhancements (DAME)
Extended Day-Ahead Market (EDAM)
Implementation and Onboarding
Extended Day-Ahead Market CISO BAA
Participation Rules**

**Version: 1.2
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Revision History

Date	Version	Description
12/14/2023	1.0	Initial draft
11/06/2025	1.1	Updated language in document, remove links that are no longer active
01/21/2026	1.2	ISO team updated PO Plan with additional descriptions and clarifications for visibility



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1. Introduction

The objective of this document is to provide the information needed by the onboarding EDAM entity enabling the successful transition from Market Simulation to Parallel Operations as the final testing stage in preparation for cutover to production.

1.1 Scope of Initiatives


The scope of this document is the EDAM Parallel Operations. ISO release planning sites for the [Spring 2026 Release initiatives](#):

- Day Ahead Market Enhancements (DAME)
- Extended Day-Ahead Market (EDAM) Implementation and Onboarding
- Extended Day-Ahead Market CISO BAA Participation Rules

1.2 Parallel operation

The ISO conducts parallel operations on a regular basis as part of its bringing new capabilities to its markets. This provides market participants an opportunity to test their systems and procedures in advance of the market implementation. The parallel operation process facilitates an effective market operations “dress rehearsal” and helps expedite a smooth production launch. The benefits of parallel operation may include but are not limited to:

- Allowing system or procedural problem identification and mitigation before the market is operationally or financially binding.
- Enabling market participants to observe the behavior of ISO systems and markets in a simulated production environment, particularly regarding new functions and features introduced through the addition of the modifications included in the Spring 2026 Release initiatives.
- Establishing confidence in the operational processes and systems associated with the new market functionality implementation.
- Providing a hands-on environment to allow participants to interact with new and unique features and functionality.
- Providing an environment where market participants can scrutinize and tailor their own tools, applications, and business practices to participate in new market functionality.


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- Providing a means of capturing additional market participant input and feedback regarding the implementation of the new market features and functionality, beyond what might have been received earlier in the policy and implementation processes.
- Providing market participants the tools to help determine:
 - Proper exchange of market-related data and validation of new timelines.
 - Common understanding of data submittal requirements and timelines.
 - Familiarity with market rules and timelines.
- An opportunity to verify the ISO bid-to-bill process in a pre-production environment that includes simulated market and operational data inputs. Allowing the market participants to verify systems, processes, and procedures which may need modifying due to the functional changes tied to the release.

1.3 Schedule Summary

Spring Release 2026 parallel operations high-level timeline is the following.

Initiative	Connectivity Testing	Integration Testing	Structured Market Sim	Unstructured Market Sim	Parallel Operations	Activation
<u>Day-Ahead Market Enhancements</u>	06/02/25 – 09/01/25	06/02/25 – 09/01/25	09/02/25 – 12/01/25	12/01/25 – 01/30/26	02/02/26 – 04/30/26	05/01/26
<u>Extended Day-Ahead Market</u>	06/02/25 – 09/01/25	06/02/25 – 09/01/25	09/02/25 – 12/01/25	12/01/25 – 01/30/26	02/02/26 – 04/30/26	05/01/26
<u>EDAM ISO BAA Participation Rules Track A</u>	06/02/25 – 09/01/25	06/02/25 – 09/01/25	09/02/25 – 12/01/25	12/01/25 – 01/30/26	02/02/26 – 04/30/26	05/01/26
<u>Extended Day-Ahead Market On-Boarding - Pacificorp</u>	05/01/25 – 05/31/25	06/02/25 – 09/01/25	09/02/25 – 12/01/25	12/01/25 – 01/30/26	02/02/26 – 04/30/26	05/01/26
<u>Extended Day-Ahead Market - PGE</u>	11/01/25 – 11/30/25	12/01/25 – 03/01/26	03/01/26 – 05/30/26	03/01/26 – 05/30/26	06/01/26 – 09/15/26	10/01/26

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Stage environment will be available for EDAM and WEIM onboarding entities after the parallel operations end date until go-live.

2. Parallel operation Approach

2.1 Pre-Parallel Operations Activities – Access Provisioning


The Spring 2026 Release parallel operations will be conducted in the ISO’s Stage environment. Participants will need to obtain access to this environment if they do not already have access. The ISO envisions participants may wish to access Master File (MF), Market Participant Portal (MPP), Outage Management System (WebOMS), Demand Response Registration System (DRRS), Customer Interface for Resource Adequacy (CIRA), Scheduling Infrastructure and Business Rules (SIBR), Base Schedule Aggregation Portal (BSAP), Balancing Authority Area Operations Portal (BAAOP), CAISO Market Results Interface (CMRI), Automated Dispatch System (ADS), and Market Results Interface Settlements (MRIS). For those who do not already have access to the Stage systems, access can be requested by coordinating with your organization’s User Access Administrator (UAA).

2.2 Pre-Parallel Operations Activities – MasterFile Resources

Participants may utilize the same CIDI request to also specify any GRDT update in Masterfile by the ISO for STAGE environment Parallel Operations testing. Only SC associated with the resource will have access to retrieve the GRDT. EDAM Entity will not have access to any GRDT, since in EDAM the entity will no longer represent resources in the Market.

2.3 Pre-Parallel Operations and Parallel Operations Activities Calendar

Activity	Description	Timeframe
TDT Submission	For initial TDT	No later than 1/20/26 for effective date 2/3/26
Spring 2026 connectivity testing for Parallel operations	Stage open for interface -access validation	Connectivity Testing starting 1/20/26, Integration testing week of 1/26/26

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Spring 2026 Parallel Operation begins	Spring 2026 Releases parallel operation in the Stage environment	02/2/26 DA for effective TD 2/3/26	
IRDT	No Changes expected	Sync from production & MAPSTAGE before start of Parallel Operations. Additional requests to be submitted via CIDI and assessed case by case.	
GRDT	No Changes expected	Sync from production & MAPSTAGE before start of Parallel Operations. Additional requests to be submitted via CIDI and assessed case by case.	

3. General Information

3.1 Parallel Operations Phase


Parallel operations will be implemented in 3 phases:

- Phase 1 will focus on DA run, with no economic transfer.
- Phase 2 will focus on DA run, with economic transfer.
- Phase 3 will include both DA run, with results following RT.

Note: Phase 1 shall emphasize the results for validating economic transfers. Phase 1 and Phase 2 shall also be utilized for Real-Time related bid to bill validations. ISO to provide additional information for entry/exit criteria for these phases. Each phase shall be at least 2 weeks, timelines are being reviewed and in the meantime are being marked as tentative to allow for flexibility between phases.

3.2 Participant Observation and Inputs

During the Spring 2026 Release parallel operation, market participants will be able to observe market results in the same applications that are available in production: OASIS, CMRI, ADS, etc (see list above).

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During Parallel Operations, the EDAM entity will be the primary party responsible for coordinating with customers data submission into STAGE environment. The entity will review with the Market Operator the completeness of data submission into Stage.

EDAM Entity will coordinate data submissions with their customers into the STAGE environment. The onboarding EDAM Entity will review completeness of data submitted into STAGE with the Market Operator, as well as review potential Market Operator seeding of data on behalf of the EDAM Entity customers having temporary access issues.

Note: CAISO to see Ancillary Service (AS) and energy bids D+7 on behalf of participants, participants to review and override if needed, if participants don't submit then CAISO seeding persists.


Note: SCs within EDAM entity representing the specific resource shall submit the IR/RC bids for the purposes of Parallel Operations. If they do not, then CAISO to insert this data based on SIBR rules. If SCs do not submit IR/RC then this will impact data and pricing quality. CAISO to continue to evaluate this dynamic throughout Market Quality Performance Meetings and provide participants with Market Performance reporting for increased visibility.

For purposes of Parallel Operations, similar to production, the EDAM Participants and Entity will be able to submit 7 days worth of data to represent similar Production business processes. These can be submitted for each consecutive day or one day for all seven days. It is encouraged that the entity and the participant use similar business process as they would in production.

CAISO Market Operator shall not overwrite any EDAM bids in STAGE.

The participants are encouraged to input any change in data into the ISO bid-to-bill using all systems available in Stage environment: MRI-S, SIBR/BSAP, ADS and OMS etc., as needed for their testing and validation purposes.

Day Ahead Market (DAM) bids are submitted for any open market for DA and RTM for up to seven days.

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DAM bids are

revalidated beginning at 3:10AM and again at 9:10AM for future dates based on the latest MasterFile for the active trade date and commitment cost data received. This also means that D2 forward won't be validated until 3:10AM with conditional validation and acceptance only until 3:10AM of the D+1. All bids validated for up to seven days.

EDAM BAA participants to continue to submit RTM related bids into STAGE.

SIBR RTM functionality for validating submitted bids or generating submitted bid based on DA market results will still apply, typically Stage market results are not published until after 12pm.

All RTM bids are revalidated between 22:10 and 23:00 for the next day based on the latest commitment cost data received.


All DAM bids are revalidated beginning at 03:10AM and again at 09:10AM for future dates based on the latest Master File and commitment cost data received.

All base schedules are revalidated beginning at 08:25AM for the next day only based on the latest Master File data received.


Participants wanting to validate functionality in SIBR or downstream applications regarding project expectations must submit Bids and Self-Schedules into STAGE consistent with existing PROD timelines.

Any time native is being mentioned in this document it is referring to submissions directly in the STAGE environment that are consistent with existing PROD timelines.


Data	Approach	Submission Process	Notes
MF - GRDT	Copy: CAISO Market Operator: CAISO will copy the MAP Stage Master File to Parallel Ops; SCs can submit updates via CIDI	Submit by CIDI, processing time typically takes 5-11 business days	Update via CIDI

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MF - TransmissioRDT	Copy: CAISO Market Operator: Based on MAP Stage with identified adjustments in Market Sim.	Submit by CIDI on January 20 th for effective TD of Feb 3 rd .	Update via CIDI and email to Jie with 10 days lead time.
BAA Demand Forecast	Native: CAISO Market Operator: DA Demand: Hourly forecast - 7DA, 6D, 5DA, 4DA, 3DA, 2DA, and DA. RTM Demand: produced with the run. DA forecast for RSE: produced native every 30 minutes starting at 6am for DA only RT forecast for RSE: will be produced native.	CAISO – All Tasks EDAM Entity – None	
DA VER Forecast	Native: EDAM Entity: submit VER Forecast into <u>MAPSTAGE</u> , ISO team to update internally into STAGE	Rolling automated submission through API 24x7.	

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Data	Approach	Submission Process	Notes
BAA Imbalance Reserves/ Flex Ramp	Native: CAISO Market Operator: BARC/ALFS will generate caliber hourly obligations. Updated and pushed to CAISO applications DA for RSE on production timelines.	CAISO currently has one year of historical for demand, CAISO team to work with EDAM entities for full one year of data for solar and wind.	
LSE Demand Forecast	Native: EDAM Entity: calculate LSE demand forecast based on CAISO forecast and post for retrieval by LSEs.		
LSE Imbalance Reserve Obligation	Native: EDAM Entity: calculate LSE Imbalance Reserve obligation based on BAA obligation and post for retrieval by LSEs.		
Outages CAISO	Stream: CAISO Market Operator: Production outages will be streamed to Parallel Ops.		
Reserve Obligations	Native: EDAM Entity SC: submit AS requirements in STAGE.		

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Data	Approach	Submission Process	Notes
BA Data	Native: EDAM Entity SC: submit BA Additional Margin, Confidence Factor, and Net Export Constraint in STAGE.		
CAISO Index Prices	Native. CAISO Market Operator: CAISO will publish production-caliber index prices for MPM and RSE Penalties to OASIS per Production timeline		
DA Transmission Bid	Native: EDAM Entity: Obtain production deals via internal EDAM process and submit to SIBR Participant SCs: Submit to Stage via SIBR		Transmission Customer Deals and bilateral trades translated to schedules and submitted to SIBR Transmission Customer using EDAM entity as their SC, will translate deals and bilateral trades and submit to EDAM entity related system

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Data	Approach	Submission Process	Notes
DA TSR 1	Native: EDAM Entity: Obtain production deals via internal EDAM process and submit to SIBR Participant SCs: Submit to Stage via SIBR	EDAM entity: Per Native timelines 3 rd Party SCs: Per Native timelines	Transmission Customer using EDAM entity as their SC, will translate deals and bilateral trades and submit to EDAM entity related system Transmission Customer Deals and bilateral trades translated to schedules and submitted to SIBR
DA TSR 2	Native Participant SCs: Submit to Stage via SIBR		
DA TSR 3	Native EDAM Entity SC: Submit to Stage via SIBR		
DA TSR 4	Native EDAM Entity SC: For EDAM BAA, based on production MCG limits, EDAM Entity SC		

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Data	Approach	Submission Process	Notes
	submissions to Stage SIBR, TC submissions to EDAM entity internal system		
DA Generation Bids	Native: EDAM Entity SC: Import production fuel and market price forecasts and submit next 4 days. Participant SCs: submit bids based on production data CAISO Market Operator: Generated based on must offer RA or VER certified for RCU.	CAISO: Close of the market EDAM entity: Submitted daily	
Tags for DA Created Resources	Native EDAM Entity SC: EDAM BA to determine if Production tags are updated, logic exists to not reject Prod tags without proper info.		
RT-Only Interchange Resources	Native: Participant SCs: submit updated interchange bid by T-75 based on any tag schedule change		

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Data	Approach	Submission Process	Notes
	<p>CAISO Market Operator: Generate a self-schedule bid for SC that do not submit updated RT bid, based on DA Award</p>		
RT Generation Bids	<p>Native</p> <p>EDAM Entity SC: Import production fuel and market price forecasts and submit next 4 days.</p> <p>Participant SCs: submit updated interchange bid by T-75 based on SC determined process</p> <p>CAISO Market Operator: Generate a self-schedule bid for SC that do not submit updated RT bid, based on DA Award; Generate economic bid for SC up to IR/RC awards</p>	<p>CAISO: Created by T+4</p> <p>Market Close</p> <p>EDAM entity: Submitted daily</p>	
Intertie Base Schedules – CAISO	<p>Stream:</p> <p>CAISO Market Operator: Stream production Base Schedules for WEIM Entities,</p>		

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Data	Approach	Submission Process	Notes
	exclude BASE ETSR between EDAM and WEIM Entities. WEIM Entities SC: Adjacent WEIM to submit base schedules on the mirrors for transactions with EDAM entity.		
Dynamic ETSR Limits	Stream: CAISO Market Operator: Production Dynamic ETSR Limits between WEIM Entities only. Native: EDAM Entity SC: submits ETSR capacity between EDAM entity and CISO, and between EDAM entity and other WEIM Entities WEIM Entities SC: submit EIM Dynamic Limit between EDAM entity and WEIM Entity		
Pre-Hour RTSI	Stream: CAISO Market Operator: Production RTSI for all WEIM Entities only. Native:	Every 5 minutes	Optional: Interchange resources that do not have an RTSI value will follow T-75 bid

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Data	Approach	Submission Process	Notes
	EDAM Entity SC: submissions from EDAM internal system		
RTM VER Forecast	Stream: CAISO Market Operator: Production VER forecast streamed from Prod for all WEIM Entities only. Native: EDAM Entity SC: EDAM BAA forecast streamed from prod for all EDAM VER	Every Minute for the required forward interval	
Telemetry	Stream: CAISO Market Operator: Production telemetry.	N/A	
RTSI – After the Fact –	Native CAISO Market Operator: Estimated using the FMM award in settlement statement. Entity can overwrite.	Daily on T+1D	
Meter Data –	Native	Daily on T+3BD before 18:00 PT	Only needed for settlement days.

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Data	Approach	Submission Process	Notes
	<p>CAISO Market Operator: Estimates generation based on Total Expected Energy.</p> <p>Load estimates based on RT Load Forecast. Interchange not applicable for EDAM area.</p>		

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3.3 Release Web Service Changes

ISO to provide all the necessary technical specifications for the web service changes in scope for Spring 2026 Release on the [developer](#) website.

Resource Data Template (RDT) submission and/or modifications for the Spring 2026 Release will take 10 business days to process. Prior to the start of parallel operations all modified RDT's for the Spring 2026 Release should be emailed to RDT@caiso.com please also Cc MarketSim@caiso.com. Once Parallel operations begins, RDT's should be submitted to the Stage Master File with an expected turnaround time of 10 business days, like Production.

ISO will be settling two trade dates per week and offering Settlements statements during the Spring 2026 Release parallel operations. Like the process is performed in our production environment, the ISO will be using estimated Meter data with our initial statements and market participant submitted meter data where applicable, for the re-calc statements.


3.4 Known Issue List

The ISO will create a known issues list which will be reviewed as part of weekly Parallel Operations meetings.

3.5 ISO's Approach for Configurable Parameter Testing in Parallel Operations

The ISO will set default values for the configurable parameters listed below. These default values will be published on the release planning site before the start of parallel operations. These default values for the configurable parameters would be fine-tuned and changed during the course of parallel operations.

- 1) *Set of transmission constraints enforced in the deployment scenarios during market simulation.*
 - Ongoing evaluation of transmission constraint parameter in parallel ops. EDAM onboarding entities can provide input for changing these values
- 2) *Tunable parameter for proportion of imbalance reserves that are "deployed" in deployment scenarios during market simulation.*

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- The parameter can be tuned weekly in Parallel ops to access various market outcomes for different parameter settings. Stakeholders will be able to provide input on value of the parameter chosen for production

3) *Energy storage “envelope constraint” multipliers*

- Parallel ops will introduce the initial multiplier values to be used in production. Stakeholders will be able to provide input on value of the parameter chosen for production

4) *Imbalance reserve demand curve cap*

- Parallel ops will run on a default value set as \$55 and assess if the imbalance reserve demand curve cap work as intended.

5) *Default availability bid prices for IRU/RCU mitigation*

- Parallel ops will run on a default value set as \$55 and assess LMPM functionality work as intended.


3.6 Configuration Guides and Payment Calendars

CAISO expects widespread participant commitment to MRI-S meter submittal during Parallel Operations; however, as a backup absent any MRI-S meter submittal for a GEN or LOAD resource CAISO will:

- For the INITIAL cycle
 - For GEN resources, create a substitute value
 - For LOAD resources, create a substitute value
- For the RECALC cycle
 - For GEN resources, create a substitute value
 - For LOAD resources, create a substitute value

ISO Settlements Calendar and Configuration guides Spring 2026 Release -

- [1st DAME and EDAM Draft Configuration Output File Published Apr 29, 2025](#)
- [2nd DAME and EDAM Draft Configuration Output File Published Aug 29, 2025](#)
- [3rd DAME and EDAM Draft Configuration Output File Published Oct 07, 2025](#)
- [4th DAME and EDAM Draft Configuration Output File Published Oct 29, 2025](#)
- [5th DAME and EDAM Draft Configuration Output File Published Nov 13, 2025](#)

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- [6th DAME and EDAM Draft Configuration Output File Published Dec 15, 2025](#)
- [7th DAME and EDAM Draft Configuration Output File Published Jan 08, 2026](#)
- [8th DAME and EDAM Draft Configuration Output File Published Jan 16, 2026](#)
- [Settlements Calendar](#)

3.7 Resource Adequacy Plan and Submissions

RA Plan shall be synced directly from PROD to STAGE; participants are able to submit updated RA Plan directly in STAGE.

4. Parallel operation Support

4.1 Routine Functions


For system connectivity issues, system availability issues, user account and permissions issues, and other technical issues, please contact the ISO Service Desk 24x7, 365 days a year @ (916) 351-2309.

4.2 Parallel Operations - Customer Support

The ISO Customer Experience team has three dedicated Client Representatives who will review, triage, and respond to CIDI tickets Monday through Friday during business hours, from 7:00 AM to 5:00 PM (PPT). This support structure will remain in place throughout the entirety of Parallel Operations.

As in Production, contact information can be found in CIDI under the Account Details tab for your support team.

- **Mark Richardson** - Responsible for overseeing Parallel Operations support, including monitoring and managing all related tickets, and remaining available to address any urgent matters. Will also conduct recurring meetings to ensure alignment and progress.
- **Steve Cassinelli** - Will lead the management of EDAM Entity CIDI cases during Parallel Operations, working closely with Gio Arechavaleta and Steven Dainard to ensure EDAM Entity receives timely responses and comprehensive support.

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- **Steve Dainard** - Primary point of contact for case management related to the two new Onboarding WEIM Entities (PowerWatch and Black Hills). Will also provide support for all Parallel Operations cases as needed.
- **Gio Arechavaleta** - Primary point of contact for case management of all entities.

Issues will be tracked through the ISO’s Case Management System, CIDI through the market participant portal ([link](#)). Simple questions that can be answered in a single call can be asked without opening a CIDI case, but if the issue cannot be resolved on the call, then participants will need to open a CIDI case. Using the “Functional Environment” field please identify the CIDI case as “Parallel Operations” question and not a “Production” question.

4.3 Parallel Operation Meetings

Support Meetings


The ISO will schedule twice weekly support meetings. These will be public meetings and visible on the ISO Calendar. The purpose of these meetings is to review timelines and activities, communicate maintenance or environment outages, and discuss any open issues or questions related to the execution of Parallel Operations. Links to online conferences, dial in numbers, and call schedules to be posted on the [ISO Calendar](#).

Market Performance Reporting

Communications shall be sent out several times throughout the week related to any information apparent to participant testing. These communications will include any progress of market performance, testing, as well as planned environment and application outages.

4.4 Parallel Operation Environment Maintenance

Parallel operation maintenance will be conducted during the established Production maintenance windows to ensure there is no impact on downstream systems. All changes will be communicated through daily updates to the [Maintenance & Outage dashboard](#) outlining the associated impacts.

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5. Parallel Operation Execution and Exceptions

Stage has been setup with specific application characteristics and data flows to foster a successful Parallel operations, please note these changes are made to facilitate a Parallel operations and will not be implemented in Production:

- Data shall be native and exceptions to be called out.
- DAM close and publication will follow production timeline.
- RT close and publication will follow production timeline.
- Market participants are encouraged to bid and base schedule in the Real Time Markets (RTM) to foster a more realistic Parallel operations.
- Market participants will need to register for a tagging test bed user identification if they would like to simulate E-Tagging, if no E-Tag is submitted ISO will “auto tag” on your behalf, limit one registration per SCID.
- ISO has activated auto approval for all OMS submissions and changes in Stage.
- Please note the timeframes for each Settlements statement publication period are different.
- Settlement timelines are covered in section 3.6 above.

6. ISO Parallel Operation Plan Contact

Please contact MarketSim@caiso.com if you have any questions or concerns regarding this plan and its content.