



Market Simulation

Extended Day Ahead Market (EDAM) Enhancements 2026

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Revision History

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1. Introduction

The primary goal of market simulation testing is to ensure that CAISO and external participants are prepared for live market conditions and can operate effectively within the CAISO markets. These simulations are crucial when there are new market features, rule changes, system upgrades, and/or new participants joining the market.

1. **Enhanced Efficiency and Stability:** Simulations contribute to efficient and stable market operations by allowing CAISO and entities' systems to work in unison.
2. **New Rule and Feature validation:** CAISO may introduce new market rules, protocols, or features in order to adhere to architecture roadmaps, compliance standards, operational enhancements, and/or policy and stakeholder processes. Simulation testing allows for early detection and correction of issues, ensuring new rules and functionalities do not inadvertently impact market operations.
3. **Increased Operational Readiness:** For market participants, simulations provide a hands-on environment to practice new functionality being implemented to ensure systems are compatible and ready for CAISO's operational protocols.
4. **Effective Risk Mitigation:** By identifying and addressing issues in a controlled environment, both CAISO and market participants can reduce risks associated with software malfunctions, data errors, or misunderstanding of market rules and implementation impacts.

The objectives of Market Simulation are to:


- Confirm successful connectivity and system interface functionality
- Validate end-to-end transaction processing across systems where applicable
- Execute defined scenarios to confirm expected system behavior
- Ensure that customer system changes interact correctly with ISO systems
- Produce simulated results to verify data accuracy and settlement logic alignment


EDAM Enhancements 2026:

The EDAM Enhancements 2026 initiative builds on the existing Extended Day Ahead Market (EDAM) and Day Ahead Market Enhancement (DAME) implementations by:

1. Addressing high priority gaps in trading and scheduling market capabilities
2. Providing equitable EDAM Entity visibility to data and reporting
3. Adding automation to Day-Ahead processes that will reduce manual work and facilitate collaboration with EDAM Entities, and

The benefits to this project will be increased satisfaction of EDAM Entities and the ability to continue growing market participation without overtaxing operations teams. Specifically, this project will prepare the ISO for the 2026 EDAM go live of Portland General Electric (PGE), running in parallel to PGE's onboarding and leveraging the same market simulation and parallel operations to the extent needed.


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2. Market Simulation Schedule

Market Simulation Scope and Schedule:

Priority	Scope Item	System(s)	Connectivity Testing	MSIM Schedule	Activation
1	Inter-SC trade for EDAM/WEIM BAA	SIBR, CMRI, Settlements	07/06/26 - 07/10/26	07/13/26-07/31/26	TBD
2	EDAM and WEIM Entities can view all resource dispatches within their BAA on ADS	ADS	TBD	TBD	TBD
3	EDAM entity access DAM results in BAAOP	BAAOP	TBD	TBD	TBD
4	Submit GHG bids for multi-area GHG	SIBR MPP MRI-S CMRI	TBD	TBD	TBD
5	EDAM entities access external MVT	MVT	TBD	TBD	TBD
6	New DACA Functionality in DAAS	DAAS	TBD	TBD	TBD
7	EDAM entities activate CCMC and RAS in webOMS, pass to DACA/DAAS	webOMS, DAAS	TBD	TBD	TBD

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3. Connectivity Testing

3.1 Connectivity Testing Overview

- Covers network testing and certificate provisioning
- Participants without certificates are expected to reach out to their User Access Administrator (UAA) for proper provisioning.
- Participants must attain STAGE provisioning for relevant applications (see Application Overview section for more information)
- Participants must update their firewall settings to ensure proper connections to applications ahead of Market Simulation.

3.2 Connectivity Testing Success Criteria

Certificate	Success Criteria
YES	<ul style="list-style-type: none"> • Successful upon completion of following criteria: <ul style="list-style-type: none"> ○ Access application via User Interface (UI) and login
NO	<ul style="list-style-type: none"> • Successful upon completion of following criteria: <ul style="list-style-type: none"> ○ Access network via UI and receive error message about incorrect provisioning
NO	<ul style="list-style-type: none"> • Not successful if: <ul style="list-style-type: none"> ○ Attempt to access network via UI and receive error message other than request for provisioning

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4. Integration Testing

4.1 Integration Testing Overview

- Participants have successfully attained certificate provisioning and have successfully completed Connectivity Testing to proceed to Integration Testing
- Participants are to test retrieval of data
- For the purposes of Integration Testing ISO shall ensure the following:
 - STAGE code is completed
 - Availability of STAGE environment applications externally
 - Data for testing of submissions and retrievals

4.2 Integration Testing Success Criteria

Certificate	Success Criteria
YES	<ul style="list-style-type: none"> • Successful upon completion of connectivity testing • Successful retrieval via UI
YES	<ul style="list-style-type: none"> • Not successful if: • Receiving submission or retrieval error messages. Submit CIDI and email marketsim@caiso.com for support.
NO	<ul style="list-style-type: none"> • Not successful as participant cannot proceed to Integration Testing without first attaining proper provisioning

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5. Access Provisioning


5.1 Getting Access to CAISO Applications

- Participants new to testing must complete network connectivity testing and certificate provisioning before proceeding (see steps above).
- Prior EDAM testers with established connectivity and active application provisioning generally do not need to repeat these steps, but should verify their access and certificates remain valid ahead of Market Simulation.
- If you're a user at an external market participant company and you need access to a CAISO application, your first step is to contact your company's User Access Administrator (UAA). Individual users do not request application access directly from the CAISO — all access requests, removals, and certificate actions must be submitted on your behalf by your company's authorized UAA. The one exception is OASIS, which is a public application and doesn't require UAA-managed access.
- Your UAA provisions access through the Access and Identity Management (AIM) application, selecting the specific applications, roles, and environments you need. Once submitted, provisioning typically takes about 1 to 1½ hours, though certain applications that require additional verification can take 24–48 hours to complete.
- If you don't know who your company's UAA is, email UAARRequests@caiso.com. If your company doesn't yet have a UAA, one will need to be established before access can be granted.

5.2 Reference Links for UAAs

For the UAAs handling these requests, the following CAISO resources cover the provisioning process:

- User Access Administrator (UAA) main page — overview, forms, and guides: <https://www.caiso.com/systems-applications/user-access-administrator-uaa>
- Access and Identity Management (AIM) User Guide — step-by-step provisioning in AIM: <https://www.caiso.com/documents/accessandidentitymanagement-aim-userguide.pdf>
- AIM application page — overview and training resources: <https://www.caiso.com/systems-applications/portals-applications/access-and-identity-management-aim>
- UAA Establishment and Requirements — defines UAA responsibilities and identity-validation duties: <https://www.caiso.com/documents/iso-user-access-administrator-uaa-establishment-and-requirements.pdf>
- AARF & SFTP Form Reference Guide — completing the Application Access Request Form: <https://www.caiso.com/documents/applicationaccessrequestformreferenceguide.pdf>

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- Requesting access and certificates — general user-facing guidance:
<https://www.caiso.com/systems-applications/requesting-access-certificates>


6. Market Simulation

6.1 Market Simulation Overview

- Covers testing in the STAGE environment
- STAGE is an integrated Production-like environment that is available to customers with provisioned access
- Allows customers to experience ISO release/project implementations prior to Production implementation
- Market Simulation will allow customers and the CAISO to conduct specific market scenarios in a test environment prior to the Production activation to ensure that all system interfaces are functioning as expected and to produce simulated market results
- Customers may use STAGE to validate the interaction of customer-driven changes with the ISO systems

6.2 Market Simulation Success Criteria

Criteria	Success Criteria
YES	<ul style="list-style-type: none"> • Successful upon execution of Market Simulation Scenarios <ul style="list-style-type: none"> ○ End to end flow of data ○ Systems are running as expected ○ No major issues with system integrations ○ No major showstoppers before activation
NO	<ul style="list-style-type: none"> • Not successful if major showstoppers present before entering activation which significantly impeded sufficient execution and completion of Scenarios. E.g., Major system functionality failures preventing data submissions and data being received in downstream applications. Key functionality not delivered as outlined in Business Requirements Specifications impacting submissions, market functions, and downstream data receives.


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6.3 Market Simulation Scenarios

Market participants shall test seven separate scenarios based on the relevant EDAM Enhancements for 2026. This document shall continue to be updated as each scenario is prepared for testing by CAISO.

6.3.1 MSS – 001 Inter SC Trade


Scenario Number	Scenario	
MSS-001	Description	Inter-SC trade for EDAM/WEIM BAA
	WEIM/EDAM Market Participant Actions	<ul style="list-style-type: none"> Two registered Scheduling Coordinators (a selling SC and a buying SC) submit matching inter-SC trades for energy in a non-CISO BAA. <p>Note: EDAM and/or WEIM BAA SCs can participate in this scenario.</p>
	ISO Actions	<ul style="list-style-type: none"> CAISO systems to allow registered SCs to submit the inter-SC trade, and allow inter-SC trading for Energy (IST) for the EDAM and WEIM BAA outside of CISO <ul style="list-style-type: none"> Existing: SIBR validates matching inter-SC trade submissions from both SCs and confirms both legs reference the same non-CISO EDAM/WEIM BAA. Existing: Day-ahead market process runs; SIBR processes and awards day-ahead inter-SC trades for the EDAM entity. Existing: Real-time / FMM market process runs; SIBR processes and awards FMM inter-SC trades for the EDAM entity. <p>Note: unmatched or mismatched inter-SC trades are invalidated per existing business rules</p>
	Expected Outcome (SIBR, CMRI)	<p>SIBR</p> <ul style="list-style-type: none"> EDAM and WEIM SCs can submit and retrieve in SIBR UI and webservice API, validate the following for DAM and FMM (RTM): <ul style="list-style-type: none"> IST Physical Energy IST Aggregate Pricing Node (APN) IST Converted Physical Trade (CPT)

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		CMRI <ul style="list-style-type: none"> • Trades are processed in the Day-Ahead Market, and the hourly RTM (FMM), settled, and reflected in the new CMRI IST report for the EDAM entity SCs only, accessible via UI and B2B API. <ul style="list-style-type: none"> ○ CMRI Report: CMRI UI > External DAM > EDAM Final Trade Set Report: New CMRI Report IST trades by BAA, with access available via UI and B2B API ○ Validate all three energy types for DAM and FMM (RTM)
Anticipated Settlement Outcome		<ul style="list-style-type: none"> • Settlement calculation and posting: <ul style="list-style-type: none"> ○ Existing: Settlement calculates day-ahead inter-SC trade settlement (charge/payment determinants) for the BAA. ○ Existing: Settlement calculates FMM inter-SC trade settlement determinants for the BAA. ○ Existing process: MRI-S publishes inter-SC trade settlement determinants to both SCs. • Inter-SC trade settlement <ul style="list-style-type: none"> ○ Settle Inter-SC trade ○ Day-ahead Inter-SC Trade Settlement ○ FMM Inter-SC Trade Settlement
Expected Settlement Outcome		CC 6301 (DAM), 6371 (FMM)


6.4 Settlements Calendar for Market Simulation

- Refer to the posted [Settlements calendar](#) for more information.

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7. Activation

- Complete successful Connectivity, Integration, Market Simulation, ahead of expected Activation
- Participants to confirm to Market Simulation team and Customer Readiness team their readiness for activation via submission of CIDI and emailing MarketSim@Caiso.com
- ISO to support participants throughout testing and thereafter for participant readiness

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8. ISO Market Simulation Contact

Please contact MarketSim@caiso.com if you have any questions, feedback, and/or concerns about the testing and/or scenarios disclosed in this document. The ISO appreciates your partnership and participation in the Extended Day Ahead Market (EDAM).