

Attachment A – Clean Tariff Language
Tariff Amendment – WEIM Assistance Energy Transfer
California Independent System Operator Corporation
September 23, 2025

29.11 Settlements and Billing for EIM Market Participants.

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(t) **Revenue and Surcharges for the Assistance Energy Transfer Product.**

The revenue from assistance Energy transfers paid by a participating Balancing Authority Area in the EIM Area that has elected to receive assistance Energy in accordance with Section 29.34(n)(3), *i.e.*, the EIM Assistance Energy Transfer Surcharge, will be calculated, allocated and distributed as follows—

(1) Assistance Energy Transfer Surcharge.

(A) Calculation. Other than amounts directly attributable to actions taken in coordination with the Reliability Coordinator, if a Balancing Authority Area in the EIM Area receives an assistance Energy transfer, then the EIM Assistance Energy Transfer Surcharge will apply to the lower of the quantities specified in Section 29.11(t)(1)(A)(i) or (ii):

- (i) the higher of the quantity of the failure of the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m), or
- (ii) the quantity of net EIM Transfers excluding base scheduled transfers as identified on all after-the-fact E-Tags associated with EIM Transfers into the participating Balancing Authority Area.
 - (a) If the EIM Assistance Energy Transfer Surcharge is applied to the assistance Energy transfers received by an EIM Entity pursuant to Section 29.11(t)(1)(A)(ii), then the quantity of EIM Transfers subject to the EIM Assistance

Energy Transfer Surcharge will be adjusted to reflect the EIM Upward Available Balancing Capacity as a credit.

- (b) If the EIM Assistance Energy Transfer Surcharge is applied to the assistance Energy transfers received by the CAISO pursuant to Section 29.11(t)(1)(A)(ii), then the quantity of EIM Transfers subject to the EIM Assistance Energy Transfer Surcharge will be adjusted to reflect the sum of all Regulation Up (adjusted for Regulation non-compliance quantities) within the CAISO Balancing Authority Area as a credit.

(B) Allocation. The revenue collected through the EIM Assistance Energy Transfer Surcharge from participating Balancing Authority Areas in the EIM Area that fail the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m) will be allocated, pro rata, to all other Balancing Authority Areas in the EIM Area with net EIM Transfers, excluding base scheduled transfers, in the export direction if such Balancing Authority Areas passed the upward capacity test in Section 29.34(l) and the upward flexibility test in Section 29.34(m). A Balancing Authority Area is eligible for a revenue allocation even if it has not elected to receive assistance Energy transfers.

(C) Distribution. The revenue collected through the EIM Assistance Energy Transfer Surcharge will be allocated to the net exporting Balancing Authority Areas in the EIM Area that pass the upward capacity test in Section 29.34(l) and the upward flexibility test in

Section 29.34(m) in accordance with Section 29.11(t)(2) will be distributed as follows:

- (1) to the EIM Entity Scheduling Coordinators for sub-allocation according to its OATT, or
- (2) to the CAISO for sub-allocation to Scheduling Coordinators that provide incremental Energy net of FMM Instructed Imbalance Energy, RTD Instructed Imbalance Energy, and Uninstructed Imbalance Energy excluding non-Participating Load.

(2) Assistance Energy Transfer Surcharges.

- (A)** Any assistance Energy transfer surcharges allocated to the net importing Balancing Authority Areas in the EIM Area that fail the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m) will be allocated to the EIM Entity Scheduling Coordinator for sub-allocation according to its OATT. Any assistance Energy transfer charges allocated to the CAISO Balancing Authority Area will be sub-allocated based on Measured Demand, excluding Demand associated with ETC or TOR Self-Schedules for which a RTM Congestion Credit was provided as specified in Section 11.5.7, and excluding Demand associated with ETC, Converted Right, or TOR Self-Schedules for which an IFM Congestion Credit was provided as specified in Section 11.2.1.5; regardless of whether an MSS Operator has elected gross or net Settlement, Scheduling Coordinators for MSS Operators will receive their allocation based on the MSS Aggregation Net Non-ETC/TOR Measured Demand.

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29.34 EIM Operations

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(n) **Effect of EIM Resource Capacity or Flexibility Insufficiency.**

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(3) **Assistance Energy Transfers.**

(A) In General. A Balancing Authority Area in the EIM Area may obtain assistance Energy transfers into its Balancing Authority Area if its Scheduling Coordinator has elected to accept automatically incremental EIM Transfer imports and pay the associated EIM Assistance Energy Transfer Surcharge following the failure of the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m) in accordance with the timelines and procedures included in the Business Practice Manual for the Energy Imbalance Market. Consistent with the requirements in the Business Practice Manual, the CAISO will send a market notification prior to the CAISO Balancing Authority Area accepting assistance Energy transfers as provided in this section.

(B) Assistance Energy Transfer Product. If a participating Balancing Authority Area in the EIM Area has opted-in to receive assistance Energy transfers consistent with the process requirements set forth in the Business Practice Manuals and the participating Balancing Authority Area fails the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m) then—

- (i) the Balancing Authority Area will not be subject to the capacity test or flexibility test failure consequences for EIM Transfers in

Section 29.34(n);

- (ii) the Balancing Authority Area will pay the EIM Assistance Energy Transfer Surcharge according to Section 29.11(t).

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Attachment B – Marked Tariff Language
Tariff Amendment – WEIM Assistance Energy Transfer
California Independent System Operator Corporation
September 23, 2025

29.11 Settlements and Billing for EIM Market Participants.

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(t) **Revenue and Surcharges for the Assistance Energy Transfer Product.**

The revenue from assistance Energy transfers paid by a participating Balancing Authority Area in the EIM Area that has elected to receive assistance Energy in accordance with Section 29.34(n)(3), *i.e.*, the EIM Assistance Energy Transfer Surcharge, will be calculated, allocated and distributed as follows—

(1) Assistance Energy Transfer Surcharge.

- (A) Calculation.** Other than amounts directly attributable to actions taken in coordination with the Reliability Coordinator, if a Balancing Authority Area in the EIM Area receives an assistance Energy transfer, then the EIM Assistance Energy Transfer Surcharge will apply to the lower of the quantities specified in Section 29.11(t)(1)(A)(i) or (ii):
- (i) the higher of the quantity of the failure of the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m), or
 - (ii) the quantity of net EIM Transfers excluding base scheduled transfers as identified on all after-the-fact E-Tags associated with EIM Transfers into the participating Balancing Authority Area.
 - (a) If the EIM Assistance Energy Transfer Surcharge is applied to the assistance Energy transfers received by an EIM Entity pursuant to Section 29.11(t)(1)(A)(ii), then the quantity of EIM Transfers subject to the EIM Assistance

Energy Transfer Surcharge will be adjusted to reflect the EIM Upward Available Balancing Capacity as a credit.

- (b) If the EIM Assistance Energy Transfer Surcharge is applied to the assistance Energy transfers received by the CAISO pursuant to Section 29.11(t)(1)(A)(ii), then the quantity of EIM Transfers subject to the EIM Assistance Energy Transfer Surcharge will be adjusted to reflect the sum of all Regulation Up (adjusted for Regulation non-compliance quantities) within the CAISO Balancing Authority Area as a credit.

(B) Allocation. The revenue collected through the EIM Assistance Energy Transfer Surcharge from participating Balancing Authority Areas in the EIM Area that fail the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m) will be allocated, pro rata, to all other Balancing Authority Areas in the EIM Area with net EIM Transfers, excluding base scheduled transfers, in the export direction if such Balancing Authority Areas passed the upward capacity test in Section 29.34(l) and the upward flexibility test in Section 29.34(m). A Balancing Authority Area is eligible for a revenue allocation even if it has not elected to receive assistance Energy transfers.

(C) Distribution. The revenue collected through the EIM Assistance Energy Transfer Surcharge will be allocated to the net exporting Balancing Authority Areas in the EIM Area that pass the upward capacity test in Section 29.34(l) and the upward flexibility test in

Section 29.34(m) in accordance with Section 29.11(t)(2) will be distributed as follows:

- (1) to the EIM Entity Scheduling Coordinators for sub-allocation according to its OATT, or
- (2) to the CAISO for sub-allocation to Scheduling Coordinators that provide incremental Energy net of FMM Instructed Imbalance Energy, RTD Instructed Imbalance Energy, and Uninstructed Imbalance Energy excluding non-Participating Load.

(2) Assistance Energy Transfer Surcharges.

- (A)** Any assistance Energy transfer surcharges allocated to the net importing Balancing Authority Areas in the EIM Area that fail the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m) will be allocated to the EIM Entity Scheduling Coordinator for sub-allocation according to its OATT. Any assistance Energy transfer charges allocated to the CAISO Balancing Authority Area will be sub-allocated based on Measured Demand, excluding Demand associated with ETC or TOR Self-Schedules for which a RTM Congestion Credit was provided as specified in Section 11.5.7, and excluding Demand associated with ETC, Converted Right, or TOR Self-Schedules for which an IFM Congestion Credit was provided as specified in Section 11.2.1.5; regardless of whether an MSS Operator has elected gross or net Settlement, Scheduling Coordinators for MSS Operators will receive their allocation based on the MSS Aggregation Net Non-ETC/TOR Measured Demand.

~~**(3) — Applicable Period for Assistance Energy Transfer Surcharges and Distribution of Collected Amounts. Upon termination of the assistance Energy**~~

~~transfer product as provided in Section 29.34(n)(3)(C), and final Settlement and Billing for the assistance Energy transfer product, this Section 29.11(t) will terminate.~~

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29.34 EIM Operations

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(n) Effect of EIM Resource Capacity or Flexibility Insufficiency.

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(3) Assistance Energy Transfers.

- (A) In General.** A Balancing Authority Area in the EIM Area may obtain assistance Energy transfers into its Balancing Authority Area ~~prior to December 31, 2025~~ if its Scheduling Coordinator has elected to accept automatically incremental EIM Transfer imports and pay the associated EIM Assistance Energy Transfer Surcharge following the failure of the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m) in accordance with the timelines and procedures included in the Business Practice Manual for the Energy Imbalance Market. Consistent with the requirements in the Business Practice Manual, the CAISO will send a market notification prior to the CAISO Balancing Authority Area accepting assistance Energy transfers as provided in this section.
- (B) Assistance Energy Transfer Product.** If a participating Balancing Authority Area in the EIM Area has opted-in to receive assistance Energy

transfers consistent with the process requirements set forth in the Business Practice Manuals and the participating Balancing Authority Area fails the upward capacity test in Section 29.34(l) or the upward flexibility test in Section 29.34(m) then—

- (i) the Balancing Authority Area will not be subject to the capacity test or flexibility test failure consequences for EIM Transfers in Section 29.34(n);
- (ii) the Balancing Authority Area will pay the EIM Assistance Energy Transfer Surcharge according to Section 29.11(t).

~~(C) —Sunset Period. This tariff Section 29.34(n), together with Section 29.11(t), will terminate on December 31, 2025.~~

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