



Adding a Resource to the WEIM

October 7, 2025

Presenter: Andrew Brown, Operations Coordination

What is a WEIM Participating Resource?

- **WEIM Participating Resource**: An owner of, operator of, or seller of Energy from an WEIM Resource that elects to participate in the Real-Time Market and enters into the WEIM Participating Resource Agreement under which it is responsible for meeting the requirements specified in CAISO Tariff Section 29.



Eligibility: The owner or operator of an WEIM Resource is eligible to become an WEIM Participating Resource if the WEIM Resource

1. meets the eligibility requirements established by the WEIM Entity in whose Balancing Authority Area the resource is located or scheduled or to which it may be dynamically transferred; and
2. is capable of delivering Energy, Curtailable Demand, Demand Response Services, or similar services within the time specified by e CAISO Tariff Section 29 for the Real-Time Market in which its EIM Participating Resource Scheduling Coordinator will submit Bids.

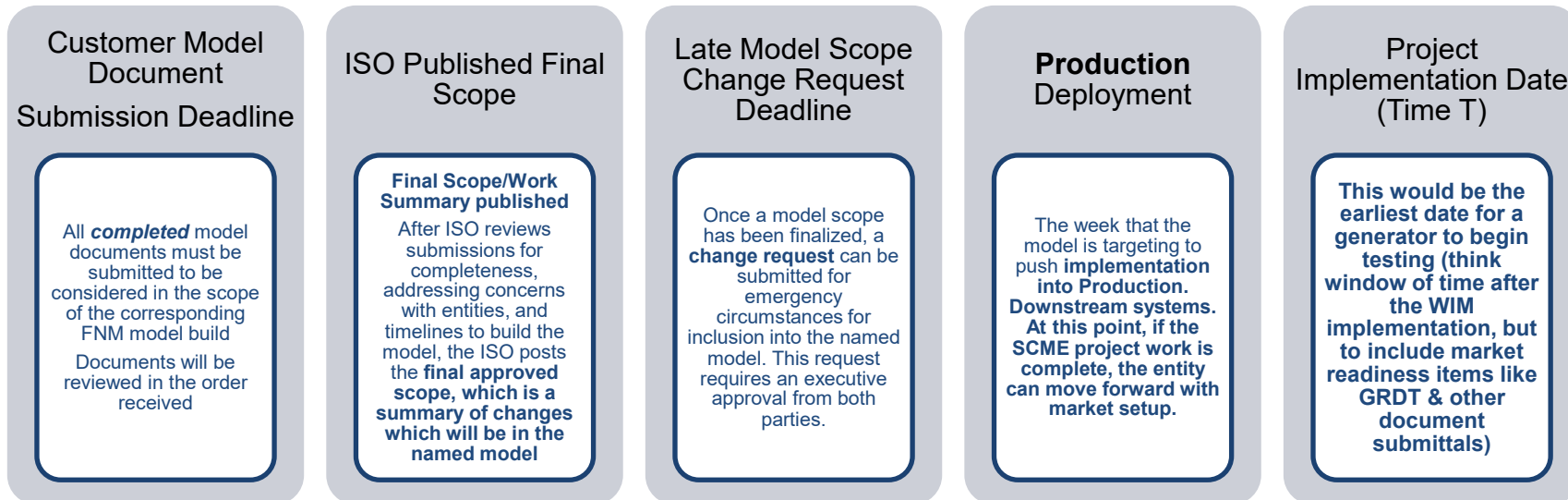
Process Overview

All WEIM resources must complete the model submission and new resource implementation process as outlined in the Modeling Submission checklist. This includes submitting modeling information, obtaining an SCME project code, and submitting required SCME and Market Set Up deliverables.



Determining the submission date using the Model Implementation Schedule

FNM Label	Customer Model Document Acceptance Deadline ¹	ISO Publishes Final Scope ²	Late Model Scope Change Request Deadline ³	Production Deployment ^{4 5}
26M2 DB139	11/19/2025	12/10/2025	12/24/2025	Week of 2/9/2026
26M4 DB140	1/21/2026	2/11/2026	3/4/2026	Week of 4/13/2026
26M6 DB141	3/25/2026	4/15/2026	4/29/2026	Week of 6/15/2026
26M8 DB142	5/20/2026	6/10/2026	7/1/2026	Week of 8/10/2026
26M10 DB143	7/22/2026	8/12/2026	9/2/2026	Week of 10/12/2026
26M12 DB144	9/23/2026	10/14/2026	10/28/2026	Week of 12/14/2026



Model Schedule can be found on:

- [Westerneim.com](https://www.westerneim.com) >> [Resources](#) >> Integrate with the ISO full network model

Important Terms Related to dates

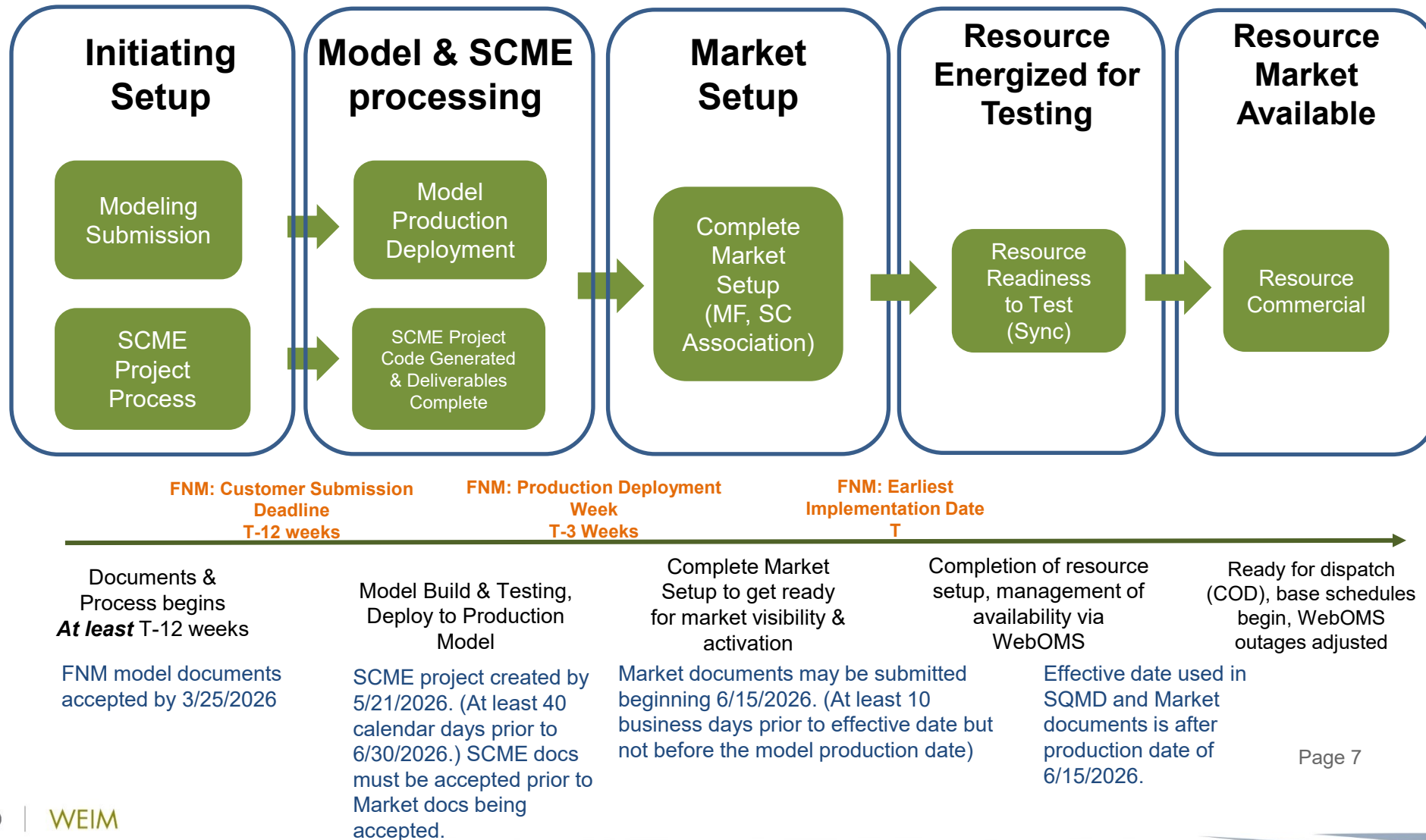
- **Customer Model Document Acceptance Deadline** – The date FNM modeling information must be accepted in RIMS to be included in a specific model build.
- **Late Model Scope Change Request Deadline** – The deadline for any late scope requests.
- **Production Deployment Date** – The date the FNM model deploys, normally a Wednesday.
- **Master File data freeze** – Master File data changes should not have an effective date for the date of the production deployment and the two days preceding the model's deployment date. A market notice will be sent one week prior to the Production deployment date.
- **Network Model Scope Template Effective Date of Change** – The date the change will be live in the field.
- **Network Scope Template Requested Model Build for Change to be Included in** – The requested model build the change should be in.
- **SCME Effective Date** – The date the meter will be available in the market.
- **Scheduling Coordinator (SC) Effective Date** – The date the resource will be active in MF and the market. This date will need to avoid the Master File data freeze dates.
- **Implementation/Sync/Test Date** – The earliest date the project will inject energy onto the grid. (Not the backfeed date)

Example 1 – identify target production date based on new project

- For new equipment, a user should submit an update in advance to ensure model includes new equipment on the targeted *first in service date* (*energization*).
- Example (more project oriented approach):** TOP AAA is adding a new generator to the system. The earliest date the equipment will be energized will be **6/30/2026**.
 - Which production deployment is the latest possible? **Week of June 15th**
 - Model documentation needs to be in by what date? **By 3/25/2026**
 - SCME project can be created when? **Once the modeling project is created.**
 - Market documents can be submitted when? **Once SCME documents are accepted and model has deployed. No earlier than 6/15/2026.**

FNM Label	Customer Model Document Acceptance Deadline ¹	ISO Publishes Final Scope ²	Late Model Scope Change Request Deadline ³	Production Deployment ^{4 5}
26M2 DB139	11/19/2025	12/10/2025	12/24/2025	Week of 2/9/2026
26M4 DB140	1/21/2026	2/11/2026	3/4/2026	Week of 4/13/2026
26M6 DB141	3/25/2026	4/15/2026	4/29/2026	Week of 6/15/2026
26M8 DB142	5/20/2026	6/10/2026	7/1/2026	Week of 8/10/2026
26M10 DB143	7/22/2026	8/12/2026	9/2/2026	Week of 10/12/2026
26M12 DB144	9/23/2026	10/14/2026	10/28/2026	Week of 12/14/2026

Target Energization on 6/30/2026





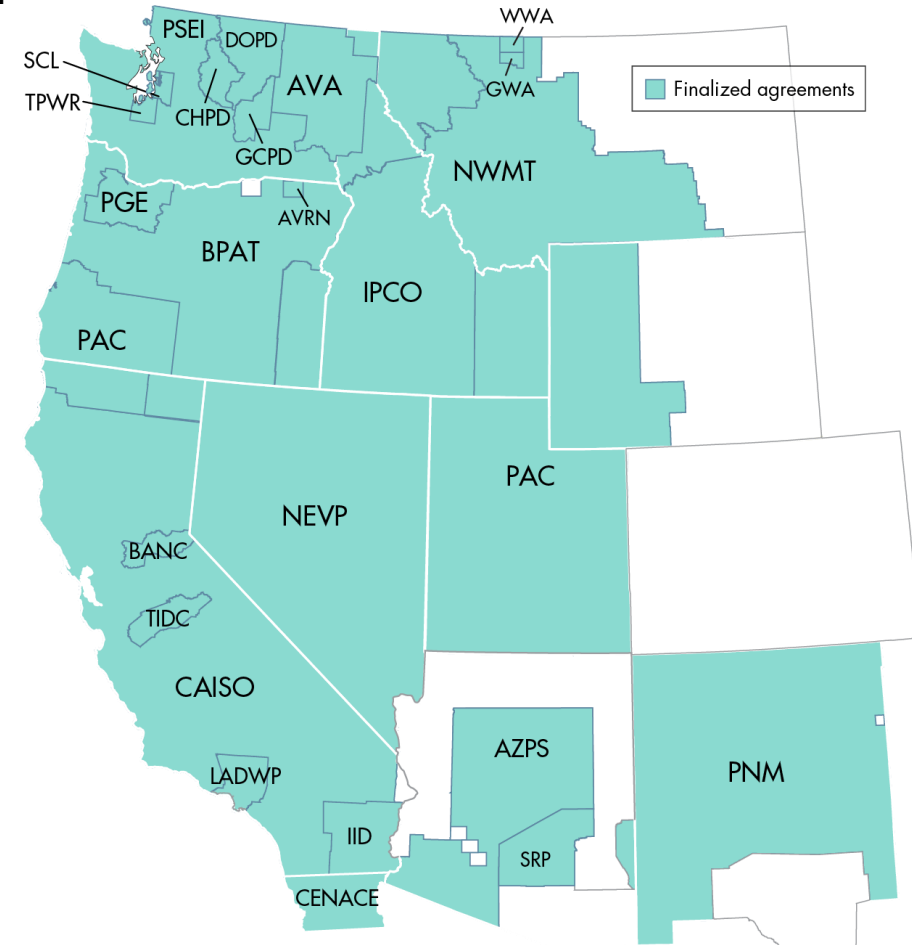
Step 1:

ADD NEW RESOURCE TO THE FULL NETWORK MODEL

Who can submit Full Network Model Updates?

WEIM Entity: A Balancing Authority that represents one or more WEIM Transmission Service Providers and that enters into an WEIM Entity Agreement with CAISO to enable the operation of the Real-Time Market in its Balancing Authority Area (BAA).

- Balancing Authority Areas participating in the WEIM will maintain their own Network Model processes with resources within their BAA, and will export that information to CAISO on a regular basis for promotion into CAISO's Full Network Model and subsequent use by the EIM.
- WEIM Entities are responsible for coordinating their network model updates with other impacted parties, including neighboring Balancing Authorities and WECC as appropriate.
- All resources within an WEIM Entity must be included in the CAISO's Full Network Model.



BA boundaries are approximate and for illustrative purposes only.

Submitting Full Network Model Updates

When can FNM modeling updates be submitted?

- The full network model schedule is posted on WEIM website under the resources tab.
<https://www.westerneim.com/Pages/Resources.aspx>
- New resources must complete the interconnection processes of their host Balancing Authority Area (BAA) prior to being included in a Full Network Model build and participating in the EIM.

Where are Full Network Modeling updates submitted?

- WEIM Entities (Balancing Authority or TOP) will need to upload their incremental updates for the Network Model through the RIMS Reliability Coordinator Dashboard.
- The link to RIMS can be found on the Market Participant Portal or RC Portal -> Apps -> Prod -> Resource Interconnection Management System (RIMS)



Step 2:

COMPLETE AN SCME PROJECT

Completing an SCME Project

Please see the WEIM Scheduling Coordinator Metered Entity presentation.



Step 3:

COMPLETE MARKET SET UP PROCESS

Pre-requisites for WEIM Resource Market Set Up

Before you start the Market Set Up Process, you must have:

- ✓ Resource Modeled in the FNM build.
 - Model Submission Checklist items submitted and accepted before the Model Build Submission Deadline
 - Model Build Assigned
- ✓ SCME Process Completed
 - SQMD Plan accepted

Let's take a second to review where we are



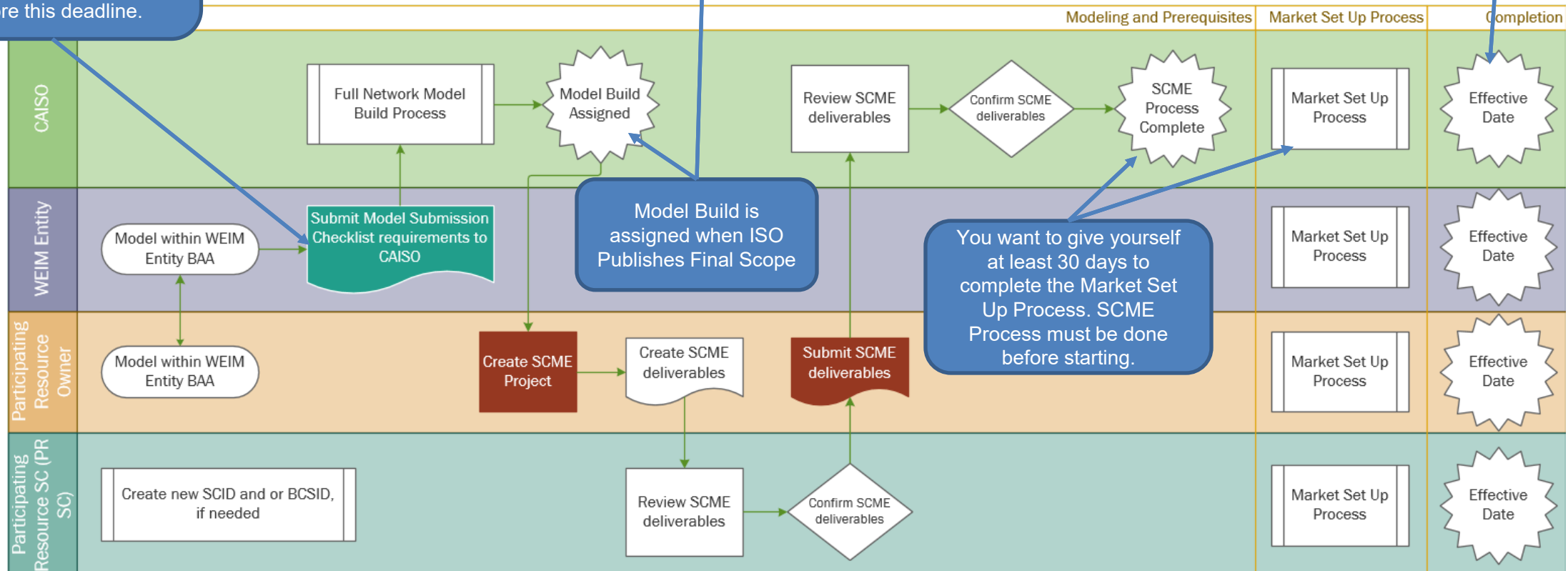
Schedule and Process Flow Touch-base

The Model Build you are assigned determines when your earliest Effective Date (Implementation Date) can be. You cannot have an effective date before this date.

FNM Label	Customer Model Document Acceptance Deadline ¹	ISO Publishes Final Scope ²	Late Model Scope Change Request Deadline ³	Production Deployment ^{4,5}
26M2 DB139	11/19/2025	12/10/2025	12/24/2025	Week of 2/9/2026
26M4 DB140	1/21/2026	2/11/2026	3/4/2026	Week of 4/13/2026
26M6 DB141	3/25/2026	4/15/2026	4/29/2026	Week of 6/15/2026
26M8 DB142	5/20/2026	6/10/2026	7/1/2026	Week of 8/10/2026
26M10 DB143	7/22/2026	8/12/2026	9/2/2026	Week of 10/12/2026
26M12 DB144	9/23/2026	10/4/2026	10/28/2026	Week of 12/14/2026

Model documents should be accepted by the Customer Submission Deadline. You should aim to submit documents at least 20 days before this deadline.

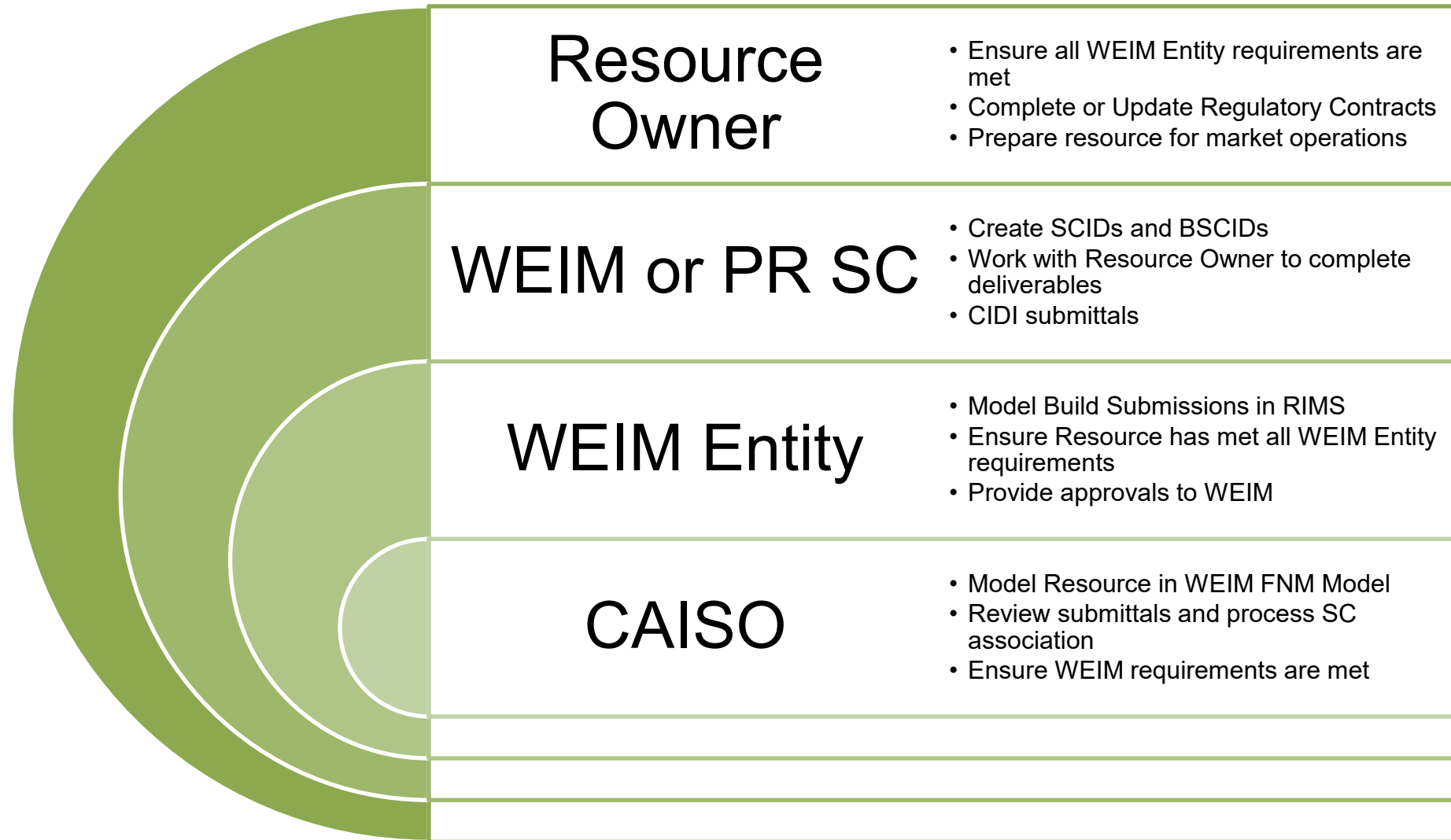
Submission Method Legend	
Email	
CIDI	
RIMS	



You want to give yourself at least 30 days to complete the Market Set Up Process. SCME Process must be done before starting.

General Roles

The four main roles of the Market Set Up Process and their responsibilities.



Helpful Abbreviations

CAISO Terms

Term	Abbreviation
California Independent Systems Operator	California ISO or CAISO
New Resource Implementation	NRI
Scheduling Coordinator Meter Entity	SCME
Scheduling Coordinator Requests	SC Requests
Scheduling Coordinator ID Code	SCID
Base Schedule ID Code	BSCID
Resource Data Template	RDT
Western Energy Imbalance Market Participating Resource Agreement	EIMPRA

CAISO Applications

Term	Abbreviation
Scheduling Infrastructure and Business Rules	SIBR
Base Schedule Aggregation Portal	BSAP
Automatic Dispatch System	ADS
Outage Management System	OMS
Resource Interconnection Management System	RIMS

Participant Terms

Term	Abbreviation
WEIM Entity	WE
Scheduling Coordinator	SC
WEIM Entity Scheduling Coordinator	WE SC
WEIM Participating Resource	PR
WEIM Non-Participating Resource	NPR

Market Set Up Process Requirement

Market Set Up Processes

- SCID/BSCID Creation
- Regulatory Contracts
- WEIM Entity Approvals
- SC Association
 - Market Documents
 - Change Request (CR)
- WEIM Effective Date

Market Set Up Documents

- Approved PR notification from WEIM Entity
- New Scheduling Coordinator Acceptance Letter
- New Scheduling Coordinator Selection Letter
- GRDT
- RCA Disclosure Form
- SCID and, if needed, BSCID
- EIMPRA Schedule 1 Update

Regulatory Contracts

- The Market Set Up Process starts with updating the regulatory contracts.
- PR Owner should confirm with the EIM Entity that all modeling requirements have been met and confirm with RDT and SC Requests that the resource has been modeled.
- Once modeling is confirmed, reach out to Regulatory Contracts at RegulatoryContracts@caiso.com to request an update to the schedule 1 with the new resource.
- Once the schedule 1 is updated, move on to the SC Association Process.

WEIM Entity Notification

- After completing Regulatory Contracts, the WEIM Entity should confirm that the PR has met all requirements. If it has, send official PR Approval Notification through CIDI.
- Sample Wording:

This serves as the official notification to the CAISO, as the EIM Market Operator, that [EIM Entity] has verified that the resources listed below meet all of [EIM Entity] EIM Entity requirements to participate in the Energy Imbalance Market.

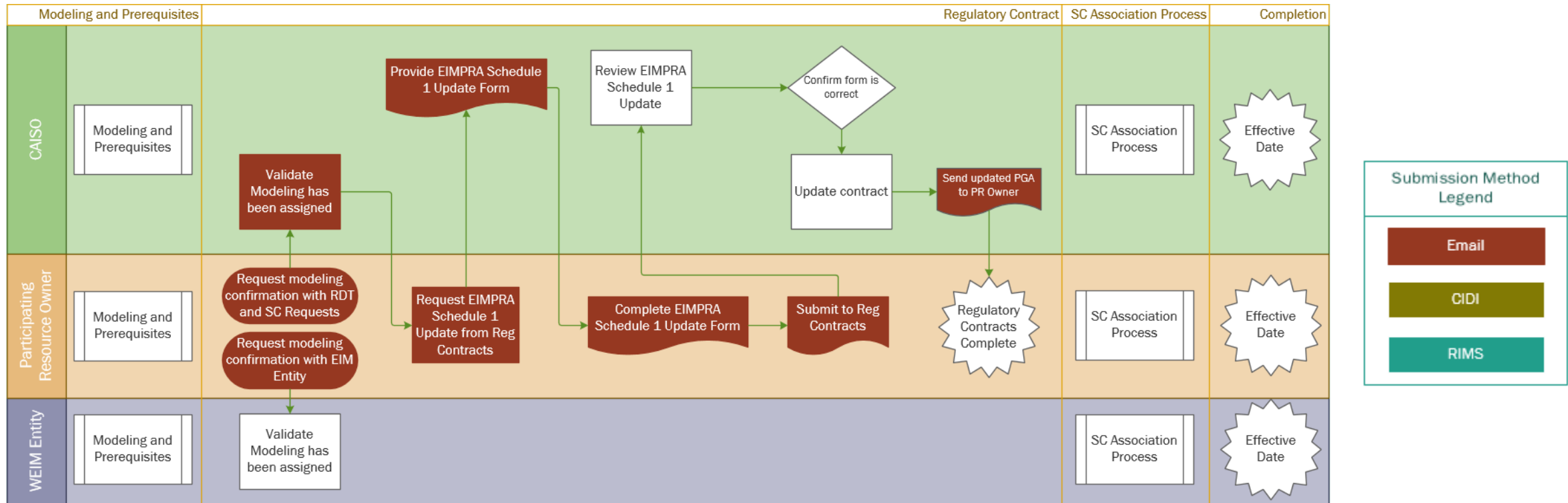
Generator Resource Data Template (GRDT)

- Improvements made to this process will be available on the WesternEIM Resources webpage in the Integrate with the ISO Full Network Model section
- A guidebook for assistance in preparing the Final GRDT.
 - Guidebook highlights the information required for submission
 - Includes a link to the GRDT definitions document.
- An example Bucket 3 GRDT with tips for how to populate each column.

SC Association

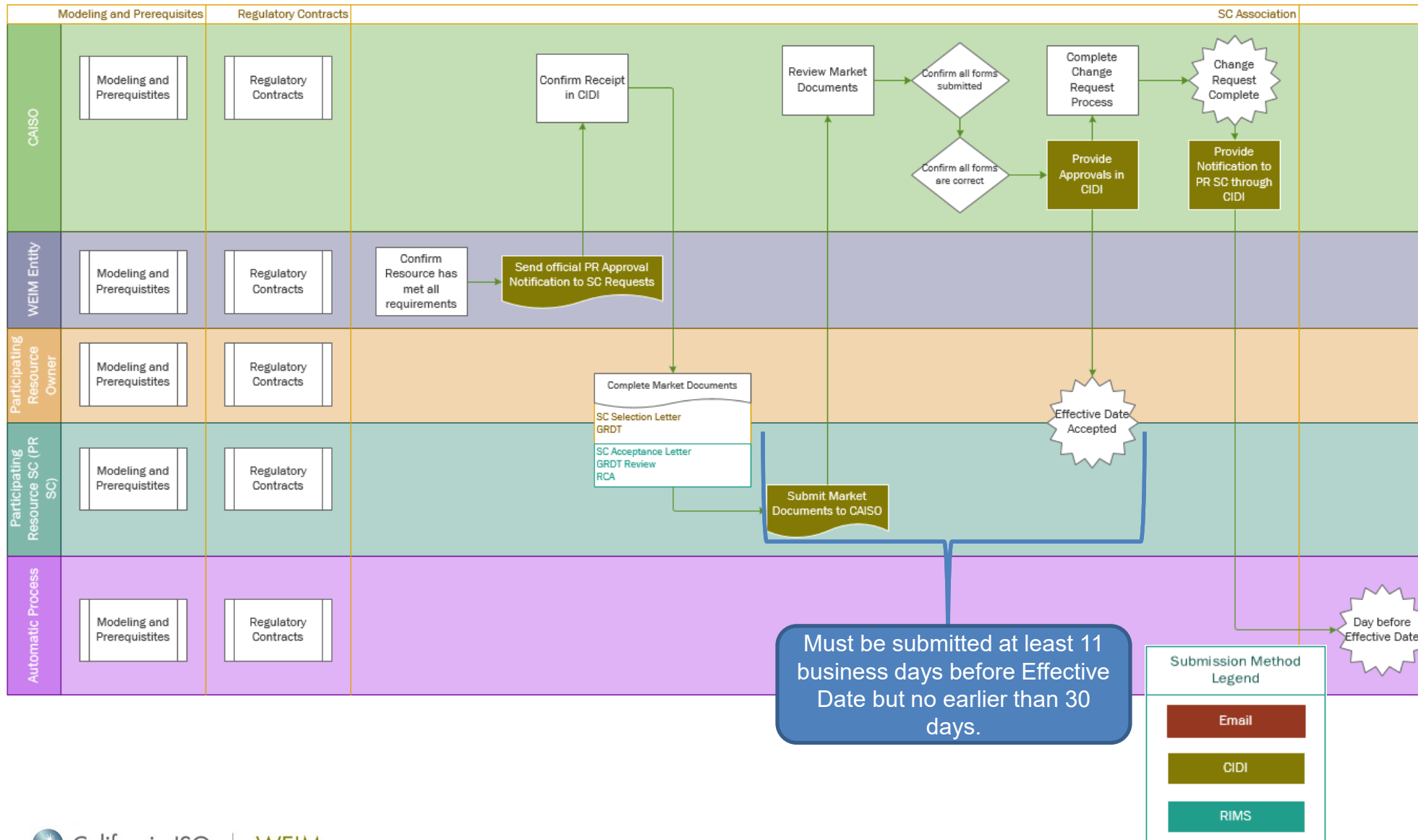
- The SC Association Process should be coordinated by the SC and CAISO's SC Request group through CIDI.
- The SC should submit the following documents through CIDI.
 - SC Selection Letter
 - SC Acceptance Letter
 - WEIM GRDT
 - Resource Control Agreement
 - WEIM Entity Notification
- SC Requests will review all documents and inform the SC of any deficiencies through CIDI. If there are any deficiencies, the SC will need to resubmit.

Process Flow – Regulatory Contracts



- The Market Set Up Process starts with updating your regulatory contracts.
- PR Owner should confirm with the EIM Entity that all modeling requirements have been met and confirm with RDT and SC Requests that the resource has been modeled.
- Once modeling is confirmed, reach out to Regulatory Contracts to get your contracts updated with the new resource.
- Once your Regulatory Contracts are complete, move on to the SC Association Process.

Process Flow – SC Association



- After completing Regulatory Contracts the WEIM Entity should confirm that the PR has met all requirements. If it has, send official PR Approval Notification through CIDI.
- The rest of the SC Association Process should be coordinated by the SC and CAISO's SC Request group through CIDI.
- The SC will work with the PR Owner to complete Market Documents. Then the SC should submit them.
- SC Requests will review all documents and inform the SC of any deficiencies through CIDI. If there are any deficiencies, SC will need to resubmit.
- Once documents have been accepted, SC Requests will complete the change request process.

Market Set Up Process Differences

This slide highlights the key differences with each type of project

New WEIM PR

Use this process for New WEIM Participating Resources

- The process for New WEIM PRs is outline in the process flows above.
- Submit Regulatory Contracts
- Work with a WEIM Participating Resource SC
- Provide WEIM Entity Final PR Approval

New NPR

Use this process for New Non-Participating Resources

- New NPRs follow a similar process to New WEIM PRs, with a few differences.
- Regulatory Contracts are not required
- NPRs work with a **WEIM Entity** SC instead of a WEIM Participating Resource SC
- WEIM Entity Final Approval not required because the WEIM Entity is the SC

NPR to PR Conversion

Use this process for an Existing Non-Participating Resource converting to a Participating Resource

- Existing NPRs follow the same process as New WEIM PRs with one key difference.
- WEIM Entity SCs must submit an SC Relinquishing Letter alongside the WEIM Participating Resource SC submitting new SC Acceptance and Selection Letters
- Relinquishing Letter transfer date should be minus one day from the effective date

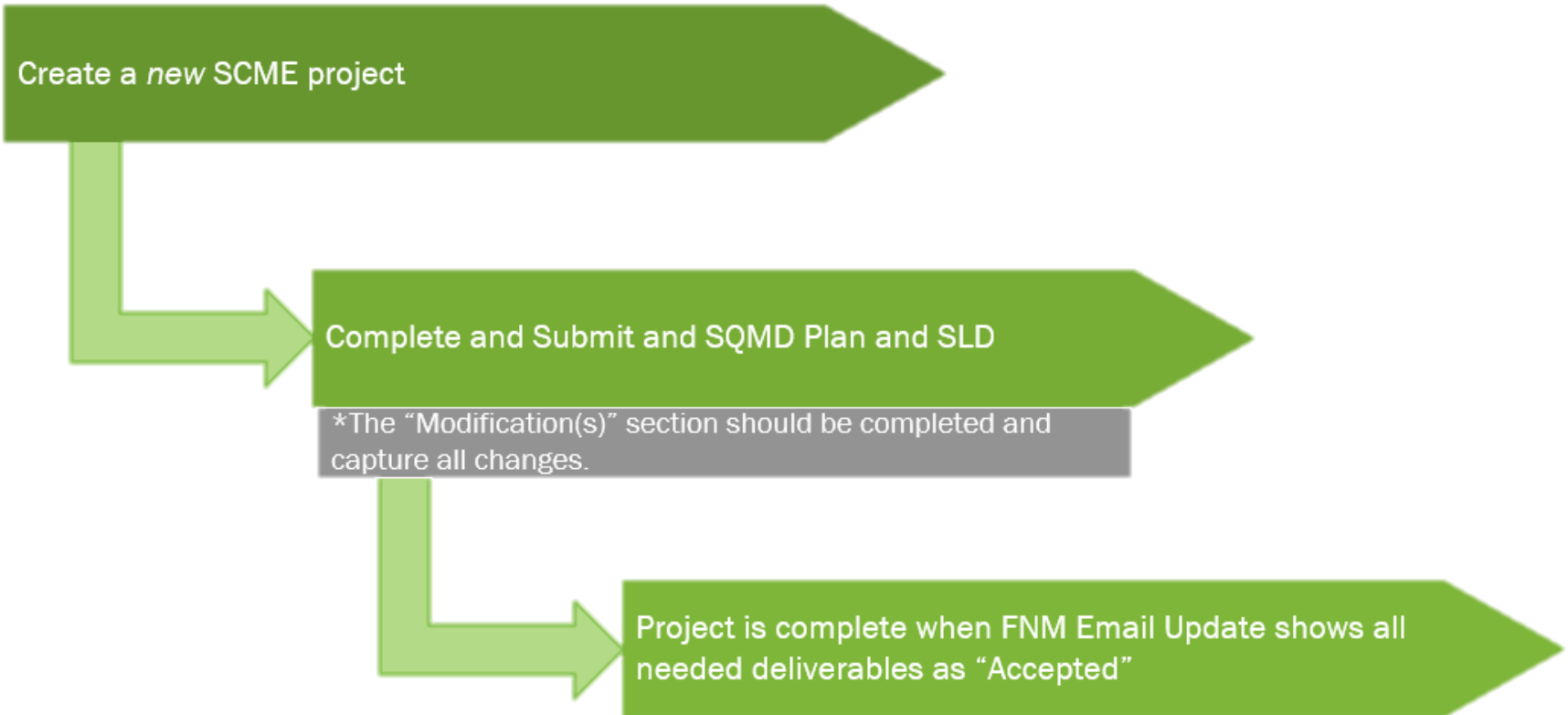


POST EFFECTIVE DATE

Making Changes Post Effective Date

SQMD Plan updates may be needed Post Effective Date. Some reasons a resource may need to update their SQMD plan are:

- Repower
- Modify meter data interval
- Add generating capacity



Resource Removal

If a Resource needs to be end dated/removed from WEIM, the following steps are needed depending on the project type.

Non-Participating Resource

1. WEIM Entity SC submits an SC Relinquishing letter via CIDI.
2. WEIM Entity removes the resource from the next ISO FNM model.



WEIM Participating Resource

1. WEIM PR SC submits an SC Relinquishing Letter and Resource Owner Letter with SC End Date via CIDI.
2. Participating Resource Owner requests EIMPRA Schedule 1 Update from Regulatory Contracts.
3. CAISO's SC Requests group will process a change request to apply the end date. CIDI notification will be sent out when change request is completed.

Resources

- [WEIM Procedure for Non-Participating and Participating Resources](#)
- [WEIM Resource Page](#)
- [Full Network Model Schedule](#)
- [Modeling Submission Checklist](#)
- [New Scheduling Coordinator and Resource Owner Reference Guide](#)
- [SC Ongoing Obligations](#)
- [Market Implementation Guide](#)
- Emails for submittals:

Group	Email	Submissions
Regulatory Contracts	RegulatoryContracts@caiso.com	Regulatory Contracts (EIMPRA)
SC Requests	SCRequests@caiso.com	Cc on emails to RDT and Reg Contracts. All submissions should be through CIDI
RDT	RDT@caiso.com	Modeling confirmation
New Resource Implementation	nri@caiso.com	SCME Project Submittals



Wrap Up and Q&A

Thank you!

For WEIM Onboarding specific questions or concerns, please submit a CIDI ticket, RE: WEIM Onboarding.