



California ISO

BPM Change Management Meeting

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Customer Readiness

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August 25, 2026

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Agenda: BPM Change Management Meeting – August 25, 2026

Topic	Presenter
Introduction / Meeting Overview	Joseph Williamson-Duffney
Energy Imbalance Market	Michael Martin
Generator Management	Jill Jordan
Market Instruments	Michael Martin
Market Operations	Michael Martin
Reliability Requirements	Melanie Bogen
Resource Interconnection Standards	Daune Wilson
Settlements and Billing	Massih Ahmadi
Wrap-Up and Next Steps	Joseph Williamson-Duffney

BPM Change Management Process
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California ISO Stakeholder Initiative Process



- Business Practice Manuals
 - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
 - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
 - Policy changes submitted through the PRR process will be referred to the policy initiative road map process.
 - Each subject area in a BPM is based on enabling language in the ISO tariff.
 - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

BPM for Energy Imbalance Market

PRR	PRR Title	Stage
1694	Clarification on the net intertie transmission constraint design and flexible ramping product	Initial

PRR 1694 – Clarification on the net intertie transmission constraint design and flexible ramping product

- Reason for revision:
 - Clarification on the net intertie transmission constraint design and flexible ramping product
- Initial comments received: 8/18/2026, Bonnie Blair (Six Cities)
- Initial comment period expired: August 18, 2026
- Next step: Post ISO Recommendation

BPM for Generator Management

PRR	PRR Title	Stage
1683	Commercial operation for markets and other clarification, and general document cleanup	Recommendation

PRR 1683 – Commercial operation for markets and other clarification, and general document cleanup

- Reason for revision:
 - Clarification regarding the applicability of commercial operation for markets, clarification regarding facilities reassessments, and other general document cleanup.
- Recommendation comments received: 8/18/2026, Bonnie Blair (Six Cities)
- Recommendation comment period expired: August 18, 2026
- Next step: Post ISO Final Decision

BPM for Market Instruments

PRR	PRR Title	Stage
1685	Addition of extended day ahead market balancing authority area aggregated transfers open access same time information system report	Recommendation
1686	Shift factor report updated to reflect the new deployment scenario column / attribute added by the extended day-ahead market	Recommendation
1691	Adding references back to market ops BPM on circular scheduling	Initial

PRR 1685 – Addition of extended day ahead market balancing authority area aggregated transfers open access same time information system report

- Reason for revision:
 - This new report displays Extended Day Ahead Market (EDAM) aggregated transfer quantities by Balancing Authority Area (BAA), categorized by commodity type (Energy, Reliability Capacity Up (RCU), and Reliability Capacity Down (RCD).
- Recommendation comments received: None
- Recommendation comment period expired: August 18, 2026
- Next step: Post ISO Final Decision

PRR 1686 – Shift factor report updated to reflect the new deployment scenario column / attribute added by the extended day-ahead market

- Reason for revision:
 - Clarifies Deployment Scenario report column
 - A: is for base case
 - U: is for deployment scenario up
 - D: is for deployment scenario down
- Recommendation comments received: None
- Recommendation comment period expired: August 18, 2026
- Next step: Post ISO Final Decision

PRR 1691 – Adding references back to market ops BPM on circular scheduling

- Reason for revision:
 - Adds references back to the Market Ops BPM sections 8.4.4 and Appendix Attachment H
 - This PRR was submitted July 24, 2026. However, the PRR will align with the comment periods for the August/September series of meetings.
- Initial comments received:
 - 8/5/2026, Vijay Singh (PacifiCorp)
 - 8/18/2026, Bonnie Blair (Six Cities)
- Initial comment period expired: August 18, 2026
- Next step: Post ISO Recommendation

BPM for Market Operations

PRR	PRR Title	Stage
1682	Updates to the admin pricing process for the market separation or isolation of the western energy imbalance market or extended day-ahead market	Recommendation
1688	Formula details on fifteen-minute market (FMM) ex-post capacity calculations	Initial
1690	Clarification on tagging MWs back into CAISO BA from a non-contiguous portion of CAISO BA	Initial

PRR 1682 – Updates to the admin pricing process for the market separation or isolation of the western energy imbalance market or extended day-ahead market

- Reason for revision:
 - This PRR clarifies actions that must be taken by entities affected by a market disruption to ensure timely and proper settlement.
- Emergency PRR:
 - This PRR has an effective date of June 15, 2026. However, the PRR will align with the comment periods for the July/August series of meetings.
- Recommendation comments received: None
- Recommendation comment period expired: August 18, 2026
- Next step: Post ISO Final Decision

PRR 1688 – Formula details on fifteen-minute market (FMM) ex-post capacity calculations

- Reason for revision:
 - This in an informational BPM update that outlines the formulas used in the FMM Ex-Post Capacity Calculations as well as graphed examples.
- Initial comments received: 8/19/2026, Alan Meck (PG&E)
- Initial comment period expired: August 18, 2026
- Next step: Post ISO Recommendation

PRR 1690 – Clarification on tagging MWs back into CAISO BA from a non-contiguous portion of CAISO BA

- Reason for revision:
 - Clarification that separate tags are required for importing MWs back into CAISO BA from a non-contiguous portion of CAISO BA.
 - This PRR was submitted July 24, 2026. However, the PRR will align with the comment periods for the August/September series of meetings.
- Initial comments received:
 - 8/18/2026, Bonnie Blair (Six Cities)
 - 8/18/2026, Alan Meck (PG&E)
- Initial comment period expired: August 18, 2026
- Next step: Post ISO Recommendation

BPM for Reliability Requirements

PRR	PRR Title	Stage
1684	Resource transitions from inside to outside the ISO balancing authority area	Recommendation
1693	2027 Availability assessment hours	Initial

PRR 1684 – Resource transitions from inside to outside the ISO balancing authority area

- Reason for revision:
 - Continuation in accreditation for existing Resource Adequacy (RA) contracts with Full Capacity Deliverability Status (FCDS) or Partial Capacity Deliverability Status (PCDS) resources moved out of the ISO Balancing Authority Area (BAA) by a change in ISO BAA boundary.
- Emergency PRR:
 - This PRR has an effective date of June 29, 2026. However, the PRR will align with the comment periods for the July/August series of meetings.
- Recommendation comments received: None
- Recommendation comment period expired: August 18, 2026
- Next step: Post ISO Final Decision

PRR 1693 – 2027 Availability assessment hours

- Reason for revision:
 - Every year CAISO updates the reliability requirements BPM to add the upcoming year's availability assessment hours. This revision provides these hours for 2027
- Initial comments received: None
- Initial comment period expired: August 18, 2026
- Next step: Post ISO Recommendation

BPM for Resource Interconnection Standards

PRR	PRR Title	Stage
1695	New BPM for resource interconnection standards	Initial

PRR 1695 – New BPM for resource interconnection standards

- Reason for revision:
 - BPM for ISO Tariff Appendix KK
- New BPM for resource interconnection standards
 - This New PRR related to the Resource Interconnection Standards are temporarily displayed under the Generator Interconnection and Deliverability Allocation Procedures BPM. The Resource Interconnection Standards BPM category is being added to the PRR tool and items will be recategorized accordingly.
 - This PRR was submitted August 10, 2026. However, the PRR will align with the comment periods for the September/October series of meetings.
- Initial comments received: None
- Initial comment period expires: September 16, 2026
- Next step: Initial Stakeholder Meeting

BPM for Settlements and Billing

PRR	PRR Title	Stage
1680	Emergency day-ahead market enhancement and extended day-ahead market fixes for high priority variances	Recommendation
1681	Emergency settlement release to fix congestion revenue allocation related congestion calculations	Recommendation
1687	Emergency settlement release to fix high priority settlement variances	Initial
1689	Emergency settlement release to fix high priority settlement variances	Initial
1692	Day-ahead contingency analysis as a service charge	Initial
1696	Emergency settlement release to fix high priority settlement variances and projects	Initial

PRR 1680 – Emergency day-ahead market enhancement and extended day-ahead market fixes for high priority variances

- Reason for revision:
 - This Emergency PRR captures Settlements changes associated to high priority variances from implementation of Day-Ahead Market Enhancement (DAME) and Extended Day-Ahead Market (EDAM).
- Emergency PRR:
 - This PRR has an effective date of May 1, 2026. This PRR was brought to the June BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the July/August series of meetings.
- Recommendation comments received: None
- Recommendation comment period expired:
 - August 18, 2026
- Next step: Post ISO Final Decision

Impacted Charge Codes
7088 Monthly Flexible Ramp Down Uncertainty Award Allocation
8077 Day Ahead Imbalance Reserve Up Tier 2 Allocation
PC Flexible Ramp Product
PC Real Time Energy Quantity
PC RTM Net Amount

PRR 1681 – Emergency settlement release to fix congestion revenue allocation related congestion calculations

- Reason for revision:
 - This Emergency PRR captures Settlements changes associated to fix Congestion Revenue Allocation (CRA) related congestion calculations.
- Emergency PRR:
 - This PRR has an effective date of May 1, 2026. This PRR was brought to the June BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the July/August series of meetings.
- Recommendation comments received: None
- Recommendation comment period expired:
 - August 18, 2026
- Next step: Post ISO Final Decision

Impacted Charge Codes
8470 Real Time Energy Transfer Revenue Settlement
PC Day Ahead Congestion
PC Real Time Congestion

PRR 1687 – Emergency settlement release to fix high priority settlement variances

- Reason for revision:
 - This Emergency PRR captures Settlements changes associated to fixes for high priority variances.
 - Emergency PRR:
 - This PRR has an effective date of May 1, 2026. This PRR was brought to the July BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the August/September series of meetings.
 - These changes were implemented on 7/9/2026
- Initial comments received: 8/18/2026, Bonnie Blair (Six Cities)
- Initial comment period expired: August 18, 2026
- Next step: Post ISO Recommendation

Impacted Charge Codes (<i>details here</i>)
384 High Voltage Wheeling Revenue Payment
6473 Convergence Bidding Real Time Energy Congestion and Loss Settlement
8076 Day Ahead Imbalance Reserve Up Tier 1 Allocation
8086 Day Ahead Imbalance Reserve Down Tier 1 Allocation
64750 Real Time Uninstructed Imbalance Energy EIM Settlement
Pre-Calculation - Real Time Energy Quantity
Pre-Calculation - Wheel Export Quantity
Pre-Calculation - Wheel Export Quantity
8470 Real Time Energy Transfer Revenue Settlement
PC Day Ahead Congestion
PC Real Time Congestion

PRR 1689 – Emergency settlement release to fix high priority settlement variances

- Reason for revision:
 - Emergency settlement release to fix high priority settlement variances
- Emergency PRR:
 - This PRR has an effective date of May 1, 2026. However, the PRR will align with the comment periods for the August/September series of meetings.
 - These changes were implemented on 7/22/2026
- Initial comments received: None
- Initial comment period expired: August 18, 2026
- Next step: Post ISO Recommendation

Impacted Charge Codes
64750 Real Time Uninstructed Imbalance Energy EIM Settlement

PRR 1692 – Day-ahead contingency analysis as a service charge

- Reason for revision:
 - After deployment of DAME and EDAM, CISO is offering this new service for Market Participants
- Initial comments received: 8/18/2026, Bonnie Blair (Six Cities)
- Initial comment period expired: August 18, 2026
- Next step: Post ISO Recommendation

PRR 1696 – Emergency settlement release to fix high priority settlement variances and projects

- Reason for revision:
 - This Emergency PRR captures Settlements changes associated to fixes for high priority variances and projects.
 - Emergency PRR:
 - This PRR has an effective date of May 1, 2026. This PRR was brought to the August BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the September/October series of meetings.
 - These changes were implemented on 8/13/2026
- Initial comments received: None
- Initial comment period expires: September 16, 2026
- Next step: Initial Stakeholder Meeting

Impacted Charge Codes (<i>details here</i>)
RUC_Net_Amount_6.1
RTM Net Amount_6.1
RTM Net Amount_6.0.2
Allocation of Transmission Losses Under Control Agreements_5.4
IFM Net Amount_6.1
64700 Real Time Instructed Imbalance Energy EIM Settlement_6.0.1
64600 FMM Instructed Imbalance Energy EIM Settlement_6.0.3
384 High Voltage Wheeling Revenue Payment_5.4.2
8080 Resource Sufficiency Evaluation Settlement_6.0.3
7071 Flexible Ramp Up Uncertainty Capacity Settlement_6.0.0b
6976 Trans Loss Obligation Charge for RT Schedules Under Control Agreement_5.3
6011 Day Ahead Energy Congestion Loss Settlement_6.0.2
495 Real Time GHG Offset_6.0.2
374 High Voltage Access Charge Revenue Payment_5.4.1

REGISTRATION IS OPEN

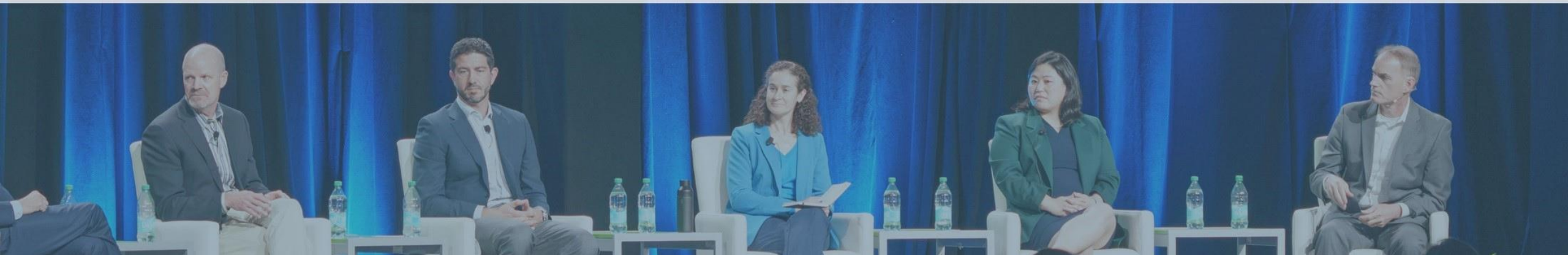
2026 STAKEHOLDER SYMPOSIUM

Welcome reception - Oct. 5
at Kimpton Sawyer Hotel, Sacramento, CA

Symposium program - Oct. 6
SAFE Credit Union Convention Center
Sacramento, CA

Visit: <https://www.caiso.com/meetings-events/events/stakeholder-symposium>

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Next BPM Change Management Meeting: Sep. 22, 2026, 11:00 AM PT

BPM change management process

The ISO systematic and publicly transparent BPM Change Management process ensures the consideration of all relevant information when modifying BPMs. The change management process uses a system available through the ISO public website that provides a way to propose BPM changes, comment on open change requests, and track proposed change requests. The change management process begins when the ISO or a stakeholder submits a web-based Proposed Revision Request (PRR). After an ISO review for completeness, PRRs are posted to the website, triggering a stakeholder review and comment period.

1. Submit Proposed Revision Request (PRR)

2. Comments period

Upon ISO acceptance, PRR becomes public and 10-business day comment period starts

3. Stakeholder meeting

PRR details and comments reviewed and discussed

4. Recommendation

ISO recommendation issued on PRR

5. Comments on recommendation

10-business day comment period open on recommendation

6. Stakeholder meeting on recommendation

PRR recommendation and comments reviewed

7. Final decision*

BPM updated or not updated

* Stakeholders have the right to appeal the final decision of a proposed revision request (PRR)

Direct BPM change management process questions to:
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