BPM Change Management Meeting

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Housekeeping reminders



This call is being recorded for informational and convenience purposes only. Any related transcripts may not be shared or reprinted without ISO's permission.



The meeting is designed to encourage open, honest dialogue and the exchange of diverse perspectives.



Please keep all comments professional and respectful.

Instructions for raising your hand to ask a question

- If you joined audio through your computer or used the “Call Me” option, please use the **Raise Hand**  icon located at the bottom center of the Webex screen to join the question queue.
- If you are not logged into Webex and joined by phone only, please dial ***3** to enter the queue.
- When it is your turn to speak, please state your name and affiliation before making your comment.
- For technical assistance during the meeting, please send a chat message to the event producer.



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 though 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.*

Agenda: BPM Change Management Meeting – November 17, 2026

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

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BPM for Market Operations

PRR	PRR Title	Stage
1706	Clean up of BPM due to minimum state of charge constraint retirement	Recommendation

PRR 1706 – Clean up of BPM due to minimum state of charge constraint retirement

- Reason for revision:
  - The CAISO retired minimum state of charge constraint in September 2023. This section is removed and replaced with "Not Used"
- Recommendation comments received from: None
- Recommendation comment period expired: November 16, 2026
- Next step: Post ISO final decision

BPM for Market Instruments

PRR	PRR Title	Stage
1707	Two new customer market results interface reports as part of the EDAM enhancements 2026 project	Recommendation
1711	Enhancements to the open access same time information system transmission interface usage report	Initial

PRR 1707 – Two new customer market results interface reports as part of the EDAM enhancements 2026 project

- Reason for revision:
  - This PRR introduces two CMRI changes. 1) An enhancement to the existing Real-Time Unit Commitment (RTUC) Advisory Schedules Report to provide it to EDAM/WEIM Entities and 2) A new Capacity Range Report that allows SC's to see IRU/IRD and RUC/RCD capacities.
- Recommendation comments received from: None
- Recommendation comment period expired: November 16, 2026
- Next step: Post ISO final decision

PRR 1711 – Enhancements to the open access same time information system transmission interface usage report

- Reason for revision:
  - As part of the 2026 EDAM Enhancements project, the Transmission Interface Usage report provides two new Transaction Types (IR and RC contributions from imports and exports) as well as updated logic to the existing Scheduled Net Energy from Imports/Exports Transaction Type.
- Initial comments received from: None
- Initial comment period expired: November 16, 2026
- Next step: Post ISO recommendations

BPM for Reliability Requirements

PRR	PRR Title	Stage
1708	Clarification on the existing net qualifying capacity deliverability study process for full capacity deliverability status and interim deliverability status resources	Recommendation
1710	Maximum import capability allocation and monthly transfer procedure due to CAISO branch group/scheduling point retirement	Initial

PRR 1708 – Clarification on the existing net qualifying capacity deliverability study process for full capacity deliverability status and interim deliverability status resources

- Reason for revision:
  - Provide clarity and describe the existing NQC deliverability study process and curtailment rules for FCDS and IDS resources, currently hosted by the superseded GIDAP BPM.
- Recommendation comments received from: None
- Recommendation comment period expired: November 16, 2026
- Next step: Post ISO final decision

PRR 1710 – Maximum import capability allocation and monthly transfer procedure due to CAISO branch group/scheduling point retirement

- Reason for revision:
  - To describe the Maximum Import Capability allocation and the new monthly transfer procedure that must be followed when a CAISO Branch group/Scheduling point retires.
  - Emergency PRR:
    - This PRR has an effective date of October 8, 2026. This PRR will be brought to the October BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the November/December series of meetings.
- Initial comments received from: None
- Initial comment period expires: November 16, 2026
- Next step: Post ISO recommendations

BPM for Resource Interconnection Standards

PRR	PRR Title	Stage
1695	New BPM for resource interconnection standards	On hold

PRR 1695 – New BPM for resource interconnection standards

- Reason for revision:
  - BPM for ISO Tariff Appendix KK
- New BPM for resource interconnection standards
  - PRR submitted 8/10/26. As this proposal introduces a new BPM, the ISO will hold additional stakeholder sessions and provide an extended comment period to review the proposed language.
- Initial comments received from:
  - Caitlin Liotiris and Molly Croll on behalf of American Clean Power – California
  - Susan Schneider on behalf of the Large-scale Solar Association (LSA)
  - Raeann Quadro on behalf of EDF Power Solutions
- Initial comment period expired: September 16, 2026
- Next steps:
  - PRR is on hold pending additional BPM stakeholder sessions.
  - Session details will be communicated via market notice.
  - PRR will return to the initial comment phase following BPM stakeholder sessions.

BPM for Settlements and Billing

PRR	PRR Title	Stage
1709	Emergency settlement release to fix high priority settlement variances and projects	Recommendation

PRR 1709 – 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 September BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the October/November series of meetings.
    - These changes were implemented on 10/1/2026
- Recommendation comments received from:
    - None
- Recommendation comment period expired:
    - November 16, 2026
- Next step: Post ISO final decision

Impacted Charge Codes *(details here)*
CG CC 5811 DAAS Charges_5.0
CG CC 6460 FMM Instructed Imbalance Energy Settlement_6.0.1
CG CC 6636 IFM Bid Cost Recovery Tier1 Allocation_6.0.1
CG CC 8011 Day Ahead Imbalance Reserve Transfer Revenue Settlement_6.0.2
CG CC 8076 Day Ahead Imbalance Reserve Up Tier 1 Allocation_6.0.3
CG CC 8086 Day Ahead Imbalance Reserve Down Tier 1 Allocation_6.0.3
CG CC 64600 FMM Instructed Imbalance Energy EIM Settlement_6.0.3
CG CC 64700 Real Time Instructed Imbalance Energy EIM Settlement_6.0.2
CG CC 64770 Real Time Imbalance Energy Offset EIM_6.0.1a
CG PC Day Ahead Congestion_6.0.3
CG PC RTM Net Amount_5.38.1
CG PC RTM Net Amount_5.38.5
CG PC RTM Net Amount_6.0.3
CG PC RTM Net Amount_6.1.1

Next BPM Change Management Meeting: Dec. 15, 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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