



California ISO

BPM Change Management Meeting

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Customer Readiness

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September 22, 2026

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



Please keep all comments professional and respectful.

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- When it is your turn to speak, please state your name and affiliation before making your comment.
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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.*

Agenda: BPM Change Management Meeting – September 22, 2026

Topic	Presenter
Introduction / Meeting Overview	Dottie Vance
Generator Management	Dottie Vance on behalf of Jill Jordan
Metering	Priyanka Namburi
Market Operations	Michael Martin
Market Instruments	Michael Martin
Energy Imbalance Market	Michael Martin
Reliability Requirements	Melanie Bogen
Resource Interconnection Standards	Daune Wilson
Settlements and Billing	Massih Ahmadi
Wrap-Up and Next Steps	Dottie Vance

BPM Change Management Process
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BPM for Generator Management

PRR	PRR Title	Stage
1703	Interconnection process enhancements 5.0 implementation for commercial viability criteria and contact requirements for agreements	Initial

PRR 1703 – Interconnection process enhancements 5.0 implementation for commercial viability criteria and contact requirements for agreements

- Reason for revision:
 - Implementation of IPE 5.0 tariff changes and clarification of requirement for contact changes in agreements.
- Initial comments received from:
 - Bonnie Blair on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA (Six Cities)
- Initial comment period expired: September 16, 2026
- Next step: Post ISO recommendation

BPM for Metering

PRR	PRR Title	Stage
1704	Update to meter inspection policy and market results interface-settlements access	Initial

PRR 1704 – Update to meter inspection policy and market results interface-settlements access

- Reason for revision:
 - Change in process for provisioning access to MRI-S
- Initial comments received from:
 - Alan Meck on behalf of Pacific Gas & Electric (PG&E)
- Initial comment period expired: September 16, 2026
- Next step: Post ISO Recommendation

BPM for Market Operations

PRR	PRR Title	Stage
1688	Formula details on fifteen-minute market (FMM) ex-post capacity calculations	Recommendation
1690	Clarification on tagging MWs back into CAISO BA from a non-contiguous portion of CAISO BA	Recommendation
1699	Clarifications on how intertie transmission corridor and intertie scheduling limits constraints are used for imbalance reserves	Initial
1700	Clarification on use for the automated dispatch system automatic generation control flag	Initial
1701	Removed three percent generation, three percent load from reserve requirement calculations	Initial

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

- Reason for revision:
 - This is an informational BPM update that outlines the formulas used in the FMM Ex-Post Capacity Calculations as well as graphed examples.
 - This PRR will go through a second round of recommendation comments.
- Recommendation comments received:
 - Bonnie Blair on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA (Six Cities)
- **Second** recommendation comment period expires: October 13, 2026
- Next steps:
 - 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.
- Recommendation comments received:
 - Bonnie Blair on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA (Six Cities)
- Recommendation comment period expired: September 16, 2026
- Next step: Post ISO Final Decision

PRR 1699 – Clarifications on how intertie transmission corridor and intertie scheduling limits constraints are used for imbalance reserves

- Reason for revision:
 - Imbalance Reserve awards from intertie resources are subject to applicable Intertie Transmission Corridor (ITC) and Intertie Scheduling Limit (ISL) constraints. These constraints ensure that sufficient intertie scheduling capability is available for Energy schedules, Ancillary Service awards, and Imbalance Reserve awards cleared in the IFM. This PRR details the design and includes formula-level detail
- Initial comments received from:
 - Alan Meck on behalf of Pacific Gas & Electric (PG&E)
- Initial comment period expired: September 16, 2026
- Next step: Post ISO Recommendation

PRR 1700 – Clarification on use for the automated dispatch system automatic generation control flag

- Reason for revision:
 - This PRR clarifies that the ADS AGC Flag should not be utilized as the sole indication that regulation has been awarded. It also outlines AGC expectations during a RTUC (HASP) market disruption.
- Initial comments received from:
 - John Diep on behalf of Southern California Edison (SCE)
- Initial comment period expired: September 16, 2026
- Next step: Post ISO Recommendation

PRR 1701 – Removed three percent generation, three percent load from reserve requirement calculations

- Reason for revision:
 - Updated BPM to match NERC's retirement of the 3+3 Operating Reserve requirement July 1, 2026.
- Initial comments received: None
- Initial comment period expired: September 16, 2026
- Next step: Post ISO Recommendation

BPM for Market Instruments

PRR	PRR Title	Stage
1691	Adding references back to market ops BPM on circular scheduling	Recommendation

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.
- Recommendation comments received from:
 - Bonnie Blair on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA (Six Cities)
- Recommendation comment period expired: September 16, 2026
- Next step: Post ISO Final Decision

BPM for Energy Imbalance Market

PRR	PRR Title	Stage
1694	Clarification on the net intertie transmission constraint design and flexible ramping product	Recommendation
1705	Provides additional guidance on the steps required for a WEIM entity to terminate real-time market participation	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
- Recommendation comments received: None
- Recommendation comment period expired: September 16, 2026
- Next step: Post Final Decision

PRR 1705 – Provides additional guidance on the steps required for a WEIM entity to terminate real-time market participation

- Reason for revision:
 - Outlines the high-level activities and considerations that the CAISO and a terminating WEIM Entity must jointly undertake to support an orderly withdrawal from the Real-Time Market, including coordination of market and intertie changes, scheduling and testing of system updates, evaluation of reliability impacts, stakeholder communications, and completion of all required operational and administrative actions.
- Initial comments received from:
 - Sara Eaton on behalf of Bonneville Power Administration (BPA)
 - Marcie Martin on behalf of Salt River Project Agricultural Improvement and Power District (SRP)
- Initial comment period expired: September 16, 2026
- Next step: Post ISO Recommendation

BPM for Reliability Requirements

PRR	PRR Title	Stage
1693	2027 Availability assessment hours	Recommendation
1702	Clarifications and clean up	Initial

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
- Recommendation comments received: None
- Recommendation comment period expired: September 16, 2026
- Next step: Post ISO Final Decision

PRR 1702 – Clarifications and clean up

- Reason for revision:
 - This revision is being made to help clarify existing processes and clean up some sections of the BPM. Refer to specifics noted in the PRR.
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- Initial comments received from:
 - Melanie Bogen on behalf of the California ISO
- Initial comment period expired: September 16, 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
 - 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 will be placed 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
1687	Emergency settlement release to fix high priority settlement variances	Recommendation
1689	Emergency settlement release to fix high priority settlement variances	Recommendation
1692	Day-ahead contingency analysis as a service charge	Recommendation
1696	Emergency settlement release to fix high priority settlement variances and projects	Initial

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
- Recommendation comments received: None
- Recommendation comment period expired:
 - September 16, 2026
- Next step: Post ISO Final Decision

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
- Recommendation comments received: None
- Recommendation comment period expired:
 - September 16, 2026
- Next step: Post ISO Final Decision

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, CAISO is offering this new service for Market Participants
- Recommendation comments received from:
 - Bonnie Blair on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA (Six Cities)
- Recommendation comment period expired: September 16, 2026
- Next step: Post ISO Final Decision

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 from: Bonnie Blair on behalf of Cities of Anaheim, Azusa, Banning, Colton, Pasadena, and Riverside, CA (Six Cities)
- Initial comment period expired: September 16, 2026
- Next step: Post ISO Recommendation

Impacted Charge Codes (details here)
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

Courtesy Notice: Skipped PRR Numbers

PRR	PRR Title	Stage
1697	This PRR was used for maintenance and testing purposes	N/A
1698	This PRR was used for maintenance and testing purposes	N/A

The PRR numbers listed above were utilized by the IT team for system maintenance and testing purposes. These numbers have been retired and will not be used for future PRR submissions.

REGISTRATION IS OPEN

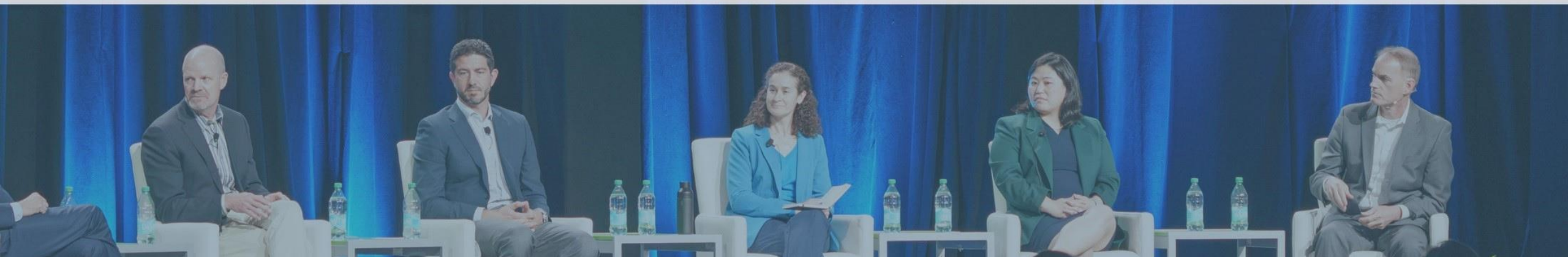
2026 STAKEHOLDER SYMPOSIUM

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: Oct. 27, 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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