Cluster 16 interconnection request intake process training on LSE Commercial Interest scoring process

July, 28 2026

Housekeeping

REMAIN MUTED

Keep yourself muted to minimize background noise

ASKING QUESTIONS

Unmute to ask verbal questions or write in the chat pod

RAISING HAND

Raise your hand using WebEx interactivity tools

Agenda

- Review LSE TPD capacity allotments for Cluster 16
- Review requirements for opting in
- Review LSE scoring process and training on use of Opt In form and LSE Scoring form

LSE Transmission Plan Delivery (TPD) capacity allotments for Cluster 16

Overview and Q&A on the TPD capacity allotments made to LSEs for the Cluster 16 commercial interest scoring process

Determining the TPD & EO capacity to allocate to each LSE for use in the commercial interest scoring process

- The CAISO takes the aggregate available MW of deliverability capacity and Energy Only (EO) capacity in each transmission zone and multiplies it by a scaling factor of 0.5.

- The CAISO then allocates shares of TPD and EO capacity to each LSE based upon on their relative load ratio shares in the most recent Coincident Peak Demand Forecast from the CEC.

- Full Allocation Election: If a Load Serving Entity lacks sufficient points to match the capacity of one project, or otherwise elects, it may indicate a full allocation to a single project. A Load Serving Entity exercising this option can select one Interconnection Request only in the Cluster Application Window. A project is ineligible to receive a full allocation election if their Interconnection Service Capacity exceeds the capacity of the election.
    - Allocating an amount of capacity to the project to the lesser of 500 MW or 50% of the Load Serving Entity's load according to the California Energy Commission's most recent coincident peak demand forecasts of Resource Adequacy load share.
    (per the IPE 5.0 tariff modifications filed with FERC on June 5, 2026)

Determining the TPD & EO capacity to allocate to each LSE for use in the commercial interest scoring process (continued)

- LSE may allocate capacity/points to a maximum of 3 interconnection requests from an Affiliate and can only allocate a combined total that cannot exceed 25% of its capacity to Affiliate projects.
    - This option is available for both TPD commercial interest allocations and EO commercial interest allocations
- LSEs are not required to allocate all of their allocated capacity, and the CAISO will not redistribute forgone or otherwise unused capacity to other LSEs or carry unused capacity over for use in a future cluster.
- TPD and EO capacity may not be used interchangeably or combined.

LSE TPD capacity allotments for Cluster 16

Load Serving Entity	TPD Allocation (MW)	EO Allocation (MW)	Max Single Project TPD Capacity (MW)[1]	Max points to an Affiliate. The limit applies to both TPD and EO individually: Greater of 3 IRs, or no more than 25% of allocated capacity points.	
				Max TPD to Affiliate Project IRs	Max to Affiliate EO Project IRs
LSE-1	**1,000**	**500**	500 (N/A)	250	125
LSE-2	**300**	**200**	471	75	50

- The TPD capacity allocations for each LSE has been emailed to each LSE. Please contact the CAISO (IRInfo@caiso.com) if you have not received that email.

What Questions Do You Have?

Unmute yourself or Raise your hand

Requirements for LSEs to opt into the commercial interest scoring process

Overview and Q&A of the LSE requirements to participate in the commercial interest scoring process within the cluster interconnection request intake process

LSE scoring process: CAISO Tariff Appendix KK Section 4.1.1.1 – Load Serving Entity Points

- To be eligible to participate in the allocation of commercial interest points to interconnection customers, an LSE must do the following at least 2 months prior to the opening of the Cluster Application Window:

1. Provide the CAISO written, electronic notice of intent to participate in the points allocation via the LSE Commercial Interest Opt in Form. The notice must include:
   a) the publicly accessible website used by LSE; and
   b) the contact information for the person or department conducting the points allocation for the LSE.
2. Publish on the publicly accessible website:
   a) the selection criteria or consideration factors for awarding points; and
   b) the contact information for the person or department conducting the points allocation for the LSE. Public websites requiring registration are permissible.
3. Please have all required information posted prior to submitting the Opt in form to IRInfo.

LSE scoring process: CAISO Tariff Appendix KK Section 4.1.1.1 – Load Serving Entity Points (continued)

- By **July 31, 2026**, LSEs must formally opt in to the Commercial Interest Scoring Process

- The *LSE Commercial Interest Opt in Form* is posted on the CAISO *Interconnection request and study* webpage under the *Commercial interest* section : https://www.caiso.com/generation-transmission/generation/generator-interconnection/interconnection-request-study
- All fields on the *LSE Commercial Interest Opt in Form* are required
- The URL for Website should be the direct link to the LSE's selection criteria and contact information regarding Commercial Interest
- Submit completed form in original format (.docx) to IRInfo@caiso.com

LSE scoring process: CAISO Tariff Appendix KK Section 4.1.1.1 – Load Serving Entity Points (continued)

Cluster intake scoring and commercial interest

- Summary of Cluster 15 Intake Scoring Results PDF 06/26/2025, 1:28 PM
- Cluster Intake Scoring Commercial Interest Requirements PDF 06/12/2025, 8:48 AM
- Cluster 15 Interconnection Request Intake Process Training on LSE Commercial Interest Scoring Process PDF 09/11/2024, 12:09 PM
- C16 Commercial Interest Information PDF 07/28/2026, 9:40 AM
- Affidavit Non-LSE Commercial Interest DOC 07/21/2026, 11:32 AM
- LSE Commercial Interest Opt In Form DOC 06/02/2026, 3:58 PM

What Questions Do You Have?

Unmute yourself <u>or</u> Raise your hand

LSE scoring process and LSE Scoring form

Overview and Q&A of the LSE commercial interest scoring process within the cluster interconnection request intake process

LSE scoring process: CAISO Tariff Appendix KK Section 4.1.1.1 – Load Serving Entity Points (continued)

- By **August 7, 2026**, the CAISO will publish on the CAISO website the contact information, website, and capacity allocation for each participating LSE who opted in.
- Upon publishing of the final LSE list, CAISO (IRInfo) will email the *LSE Commercial Interest Point Allocation* form template to LSEs to complete.
- One form is required per Project. Project Name and Project Number must match exactly what is reflected on the published list of Interconnection Requests

California ISO

LSE scoring process: CAISO Tariff Appendix KK Section 4.1.1.1 – Load Serving Entity Points (continued)

- All fields on form are required to be completed
- Select Yes or No if the project is affiliated with the LSE
- MW Allocation is the amount of MW capacity you wish to allocate to a project
- Points are determined based on the amount of MWs an LSE allocates to a Project and the Project's Interconnection Service Capacity.
  - Example: Project ABC is 100 MW POI. An LSE Allocates 100 MW to Project ABC which yields 100 sub-points and translates to 30 weighted points

LSE scoring process: CAISO Tariff Appendix KK Section 3.5.4 – Scoring Process

- Submit completed *LSE Commercial Interest Point Allocation* form in original format (.docx) to IRInfo@caiso.com
- LSEs submitting commercial interest points must do so no later than 10 days after the list of Interconnection Requests is provided.
- Target date **October 26, 2026**.
- The CAISO will score interconnection requests to determine their eligibility for the cluster study (interconnection requests in merchant zones and non-reimbursable EO interconnection requests are not scored).
- The CAISO will combine any Commercial Interest project points with the project's Project Viability and System Need scores for the project's total intake score.

What Questions Do You Have?

Unmute yourself <u>or</u> Raise your hand

Wrap Up

Summary

- What’s happening next

Resources

Review the [Interconnection request and study | California ISO (caiso.com)]() page

- Commercial Interest Forms

  https://www.caiso.com/documents/lse-commercial-interest-opt-in-form.docx

  https://www.caiso.com/documents/affidavit-non-lse-commercial-interest.docx

- Related CAISO Tariff and Business Practice Manuals
  - Tariff Appendix KK (Sections 4.1.1.1 and 4.3.1)
  - Tariff Amendment – Interconnection Process Enhancements

California ISO

2026 RESOURCE INTERCONNECTION STANDARDS FAIR

The objective of this educational forum is to provide stakeholders with an opportunity to learn more about the ISO's interconnection process and recent changes affecting Cluster 16. Attendees can participate in-person or virtually.

Date:	Aug. 11, 2026 from 09:00 – 16:00 PPT
Location:	California ISO, 250 Outcropping Way, Folsom, CA
Registration:	https://caiso.regfox.com/resource-interconnection-standards-fair-aug-11-2026

If you plan to attend in-person, please register by end of day Aug. 6, 2026

Thank you for your participation!

For clarification on anything presented in this training, send an email to: IRInfo@caiso.com

For any other questions or stakeholder specific questions or concerns, please submit a CIDI ticket or Contact Us Submission.