

# TRAINING: EDAM Intertie Scheduling Readiness

2/11/26, 1pm-3pm, Webinar

Presenter:

Beau Beljean, Lead Bulk Power System Trainer



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# AGENDA



# Agenda

1. Learning Objectives
2. Scheduling at non-CAISO EDAM BAA Interties
3. Scheduling at CAISO BAA Interties with non-EDAM BAAs
4. Scheduling at CAISO BAA Interties with an EDAM BAA
5. Scheduling RA Imports at CAISO BAA Interties
6. Scheduling Exports from the CAISO BAA
7. Additional Resources & Materials

# 1. LEARNING OBJECTIVES



## Learning Objectives

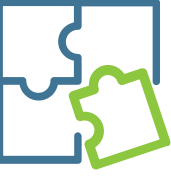
- **Identify** inertia schedule modeling changes with the introduction of EDAM
- **Identify** inertia schedule modeling differences for CAISO inertias vs Non-CAISO EDAM inertias
- **Identify** implementation design adopted for the Transitional Period
- **Identify** requirements for RA and RPS imports at identified CAISO transfer locations
- **Identify** RA import reassignment requirements at identified CAISO transfer locations
- **Identify** registration requirements for inertia resources

## 2. SCHEDULING AT NON-CAISO EDAM BAA INTERTIES





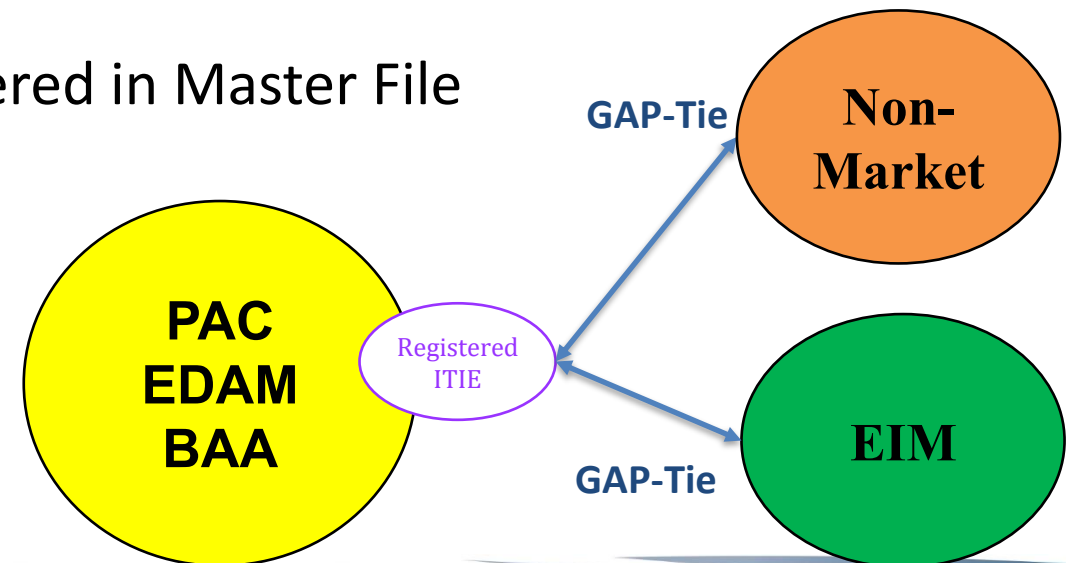
# Scheduling at non-CAISO EDAM Interties with non-EDAM areas (e.g. for PAC EDAM BAA)



## In the Day-Ahead:

- Schedules will be modeled under GAP-Tie design
  - (same modeling as for WEIM intertie schedules)
- Based on the aggregate generation in the neighboring Non-EDAM BAA
  - Energy exchanges modeled as if sourcing/sinking from/to a Non-EDAM BAA
  - Settled at GAP-Tie LMP
- External EDAM Intertie Resources are to be registered in Master File

*Note: Transaction IDs for these exchanges would be defined per EDAM Entity's OATT*



# 3. SCHEDULING AT CAISO BAA INTERTIES WITH NON-EDAM BAAs

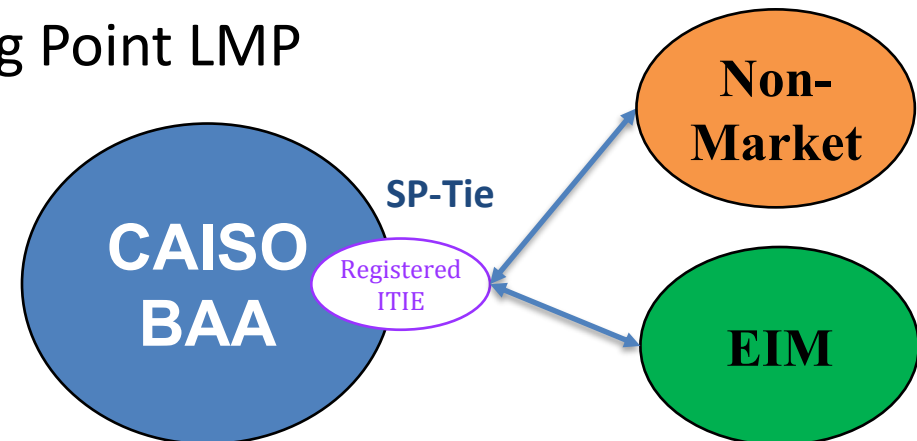


## Scheduling at CAISO BAA Interties with non-EDAM areas

**Note:** Scheduling Point intertie (SP-Tie) modeling for intertie schedules will remain in place at the CAISO BAA Interties with non-EDAM BAAs

### In the Day-Ahead:

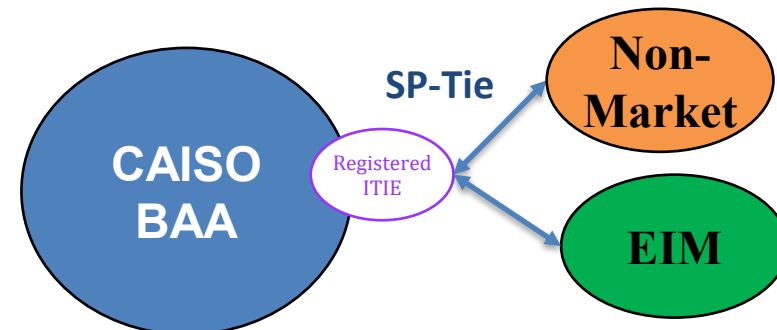
- Intertie scheduling and modeling practices remain as today
- Intertie schedules modeled as energy injections (i.e. import) directly at the SP-Tie location based on the modeling of a generator at that location
- Settlements will continue to be at the Scheduling Point LMP



# Scheduling at CAISO BAA Interties with non-EDAM areas

## In Real-Time:

- For intertie schedules with non-EDAM areas at the CAISO BAA interties
  - At interties with **Non-Market** areas, Optimization in the HASP (as today):
    - Schedules continue to be re-optimized through the Fifteen-Minute Market (FMM).
  - At interties with **EIM** areas, Optimization is at the HASP **ONLY** :
    - Schedules **NOT** re-optimized in the Fifteen-Minute Market (FMM).
    - **Except for Dynamics:**
      - Continue to be re-optimized in the FMM and RTD at their intertie locations



## 4. SCHEDULING AT CAISO BAA INTERTIES WITH EDAM BAA (i.e. Transfer Locations)



# Scheduling at Scheduling at CAISO BAA Interties with EDAM BAA

(i.e. CAISO/PAC Transfer Locations)

In general, Scheduling Coordinators will use Transfer System Resources (TSRs), as intertie schedules will no longer be supported at these locations with the introduction of EDAM

**However**, during the Transitional Period, the ISO will continue to accept bids and associated intertie schedules at EDAM Internal interties between CAISO and PAC:

- **MONA** (MONA\_3\_N501)
- **CRAG VIEW** (CRAGVIEW\_1\_GN001)
- This is ONLY for
  - **RA Imports** syncing to the CAISO BAA
  - **RPS Contracts** importing to the CAISO BAA

# Scheduling at Scheduling at CAISO BAA Interties with EDAM BAA

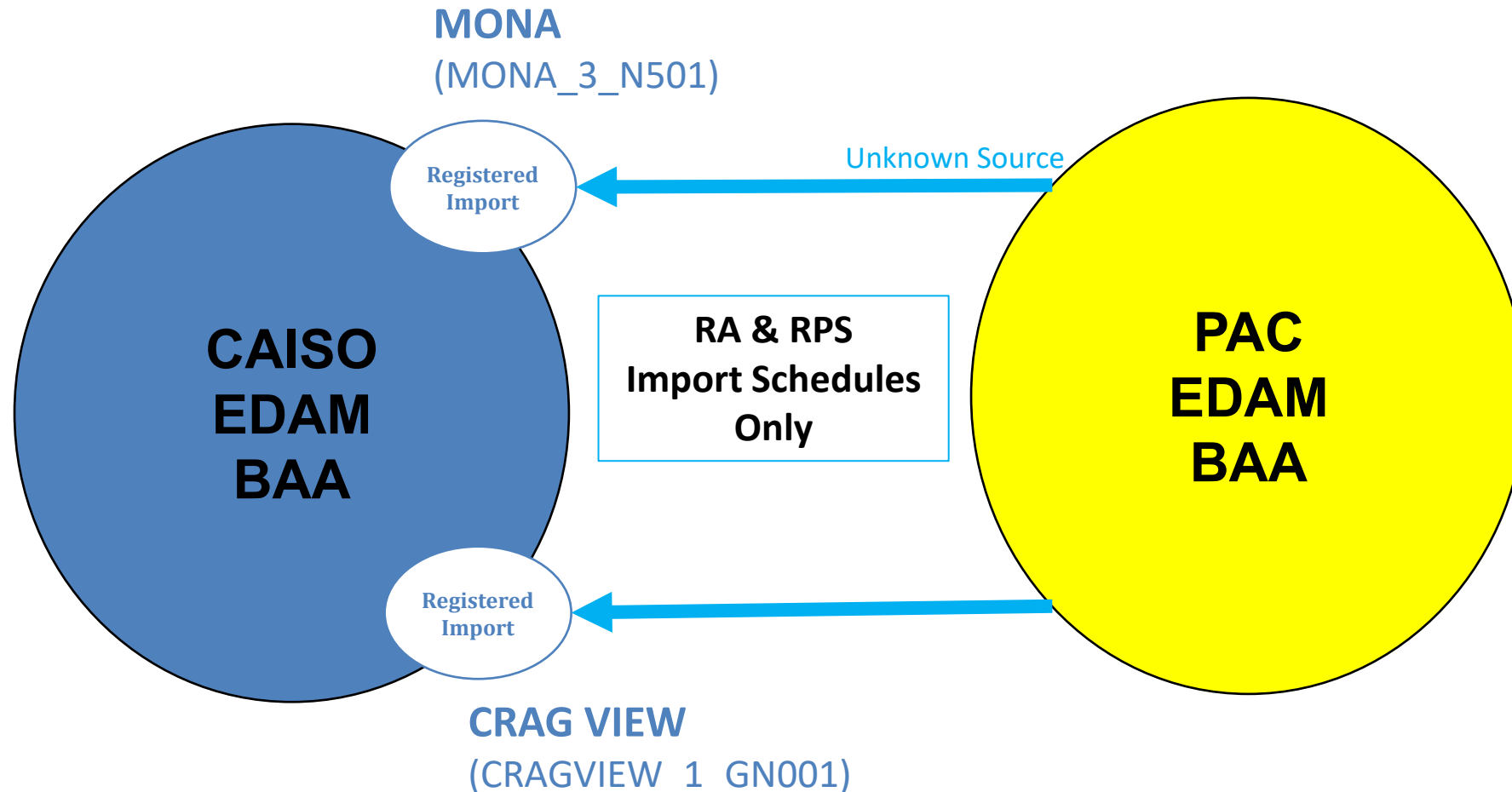
(i.e. PAC/CAISO Transfer Locations)

**Note:** MasterFile registration will be required to bid at these two locations (MONA & CRAG VIEW). These intertie locations will not support other types of intertie bids.

By registering a resource associated with these transfer locations to support bidding of RA imports and RPS contract imports, the Scheduling Coordinator attests that they meet the requirements to submit bids and receive schedules at those locations consistent with the terms of the CAISO Tariff.

During the Transitional Period, at MONA & CRAG VIEW:

In the Day-Ahead:



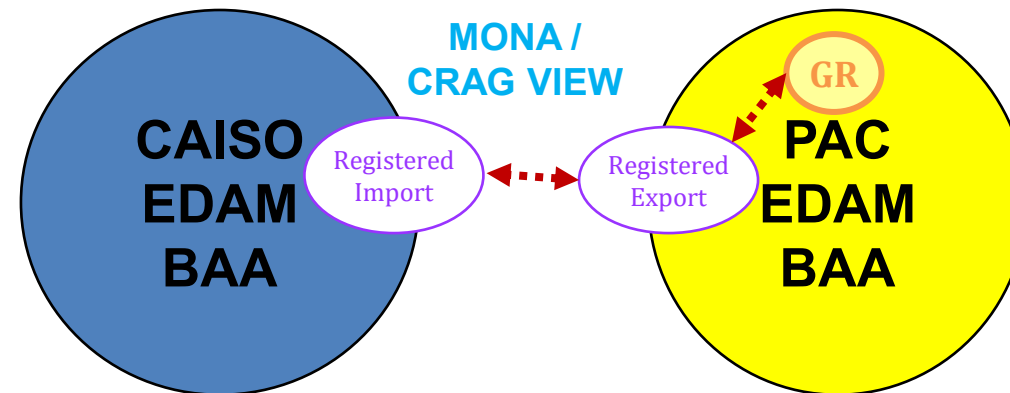


# Real-Time Market Expectations for bids at Mona & Crag View



Note: This is for Transactions where the Source Generator is not known in the Day Ahead

1. If bid and awarded in the Day Ahead Market (DAM) , the Scheduling Coordinator (SC) may continue to bid in Real Time (RT) at MONA and CRAG VIEW (*optimization in HASP only*)
2. Market Schedules should reflect the submitted e-tags for the transactions (as today)
3. In Real Time, if the source Generator is located in the PAC BAA, the SC is expected to submit an export Self-Schedules from PAC BAA to CAISO BAA

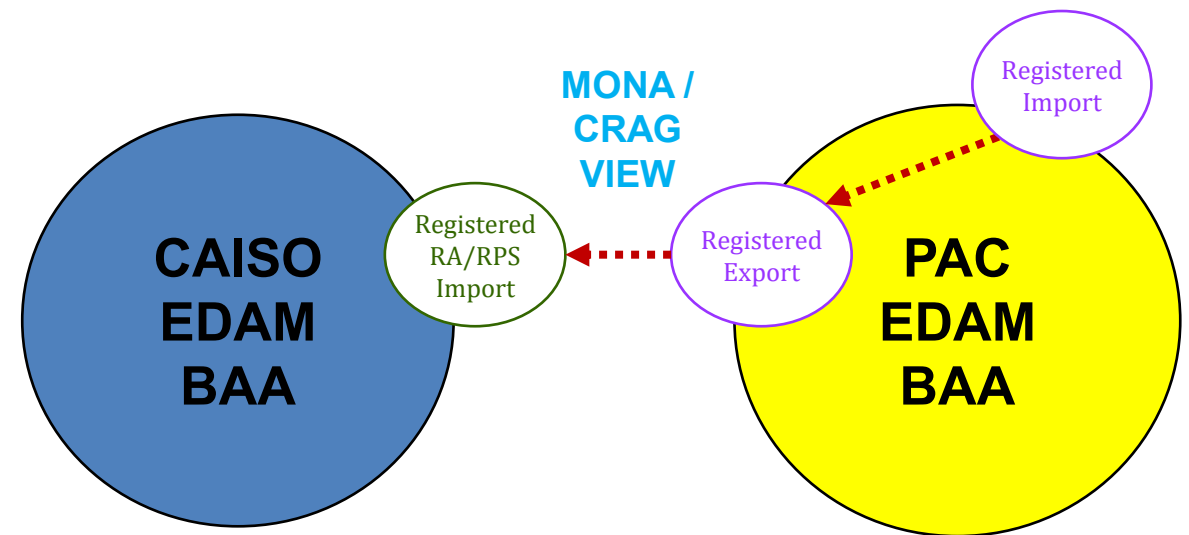


*Note: LMP's can vary at associated transaction points based on congestion and losses*

# Real-Time Market Expectations for bids at MONA & CRAG VIEW: Sourced outside of PAC BAA

Note: This is for Transactions where the Source Generator is not known in the Day Ahead

1. If awarded in the DAM, the SC may continue to bid in RT at MONA and CRAG VIEW (Optimization in HASP only)
2. Market Schedules should reflect the submitted e-tags for the transactions (as today)
3. In Real Time, if the source Generator is located outside of and wheeling through the PAC BAA, the SC is expected to submit both:
  1. An import SS to the PAC BAA
  2. An export SS from PAC BAA to CAISO BAA



*Note: LMP's can vary at associated transaction points based on congestion and losses*

## 5. RA IMPORTS AT CAISO BAA INTERTIES



## RA Imports at CAISO BAA Interties with Non-EDAM Areas

### No changes:

- RA Import continue to be shown as today on Annual and Monthly Showings
- Bids, both in DA and RT, at the import interties continue to supported with existing Must Offer Obligations (MOO)
- No changes with how Pseudo-Ties, Dynamically scheduled and Non-Resource Specific imports are shown at the interties

## RA Imports at CAISO BAA Interties with EDAM Areas

### For MONA and CRAG VIEW interties:

- Continue to support RA import Showings at these locations
  - Need Maximum Import Capability (MIC) to support Showings at the locations
- Bidding:
  - If the Source Generator of the RA import is known prior to 08:00am PPT of the DAM run, the SC is expected to reassign to that specific Generator located in the PAC BAA.
  - If reassigned, no bid expected at shown ITIE registered ID
  - If the Source of the RA import is **NOT** known prior to 08:00am PPT of the DAM run, or is otherwise located outside of the EDAM footprint, the SC can bid at MONA and CRAG VIEW
    - Reassignment is not expected

## When is the Scheduling Coordinator expected to “reassign” the RA obligation for a RA import?

- Source Generator supporting the RA obligation is located in an EDAM BAA
- Reassignment must be completed prior to 08:00 am PPT of the DAM run
- SC of reassigned resource must also accept reassignment by 08:00 am PPT of the DAM run
- The physical resource then has the RA Must Offer Obligation (MOO) associated with it for the duration of the reassignment (*similar to the RA substitution rules in place today*).
- Reassignments are processed and managed in CIRA

## For RA Imports shown as Registered Dynamic Resources (TG):



- Registered EDAM Dynamic Resource ID's are shown on a Supply Plan
- Those shown Dynamics Resources MUST reassign to physical resource for the month (using a Resource ID).
- These MasterFile registered Dynamic Resource IDs that reside within an EDAM BAA will participate in the market with the physical registered Resource ID
- If bid in, will need to be bid at their physical location in the EDAM BAA using the registered Resource ID.



## For Non-Resource Specific Import Interties (ITIES) schedules

- ITIEs with RA Obligation but with **no** Reassignment will have schedules optimized in HASP
- ITIEs with RA Obligation with Reassignment will:
  - Reassign the RA obligation to a Physical Resources within the EDAM BAA  
Participate in the DAM (prior to 8:00am PPT) & RTM at physical resource sourced in EDAM
  - E-tags to reflect source of supply
  - Financial Inter-SC Trade (IST) is available to effectuate financial true-ups
- ITIEs with **no** RA Obligation or RPS contracted imports are not supported under EDAM Market Rules at EDAM Internal Interties (i.e. Transfer Locations: MONA & CRAG VIEW)





## 6. ESTABLISHING EXPORTS RESOURCES



## Exports from the CAISO BAA to non-EDAM interties



**NOTE:** At CAISO BAA interties with non-EDAM areas, Low priority and High priority exports constructs will continue to be support as today.

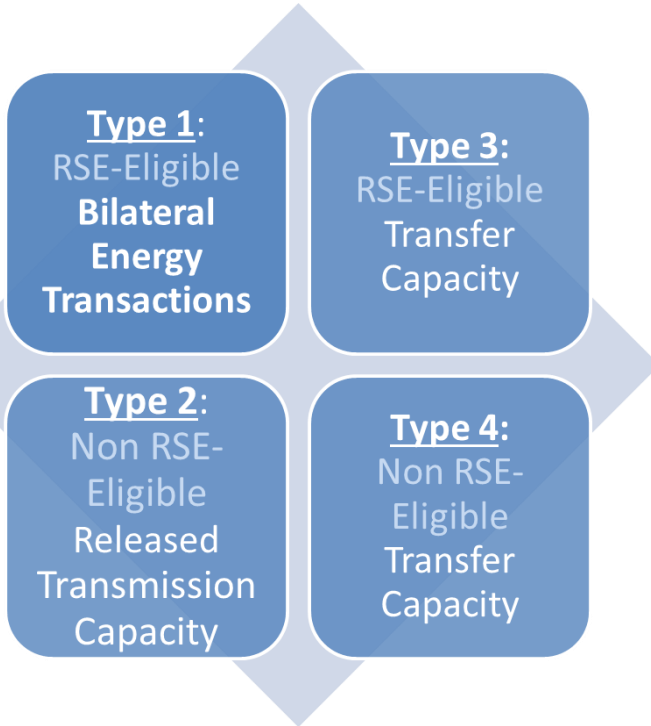
### **If the Sink BAA is a Non-EIM BAA:**

- No change to how currently done today

### **If the Sink BAA is a EIM BAA:**

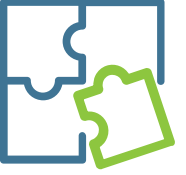
- Follow existing registration protocol of an “Export System Resource”
  - Via submission of an Intertie Resource Data Template (IRDT) in MasterFile
- Registration of the system resource will be associated with the specific mirror intertie
- Associated mirror IDs are to submit via export Self-Schedules at export locations to balance imports to the CAISO BAA for Day Ahead or HASP

# Exports from the CAISO BAA to EDAM interties (Transfer Locations)



- EDAM Internal Interties between CAISO BAA and an EDAM BAA are not directly biddable locations for export bids as these will now become Transfer Locations (i.e. currently MONA & CRAG VIEW)
- Exports of contracted generation to EDAM BAAs will be supported through Transfer System Resources (Type 1 or Type 3)
  - Imports/Exports Transfer System Resources (*high market clearing priority*)
  - No High/Low priority exports at Transfer Locations

# Exports from the CAISO BAA to PAC BAA interties (transfer locations)



## For Transfer System Resources between CAISO BAA and PAC BAA:

**Type 1:**  
RSE-Eligible  
**Bilateral  
Energy  
Transactions**

**Type 3:**  
RSE-Eligible  
Transfer  
Capacity

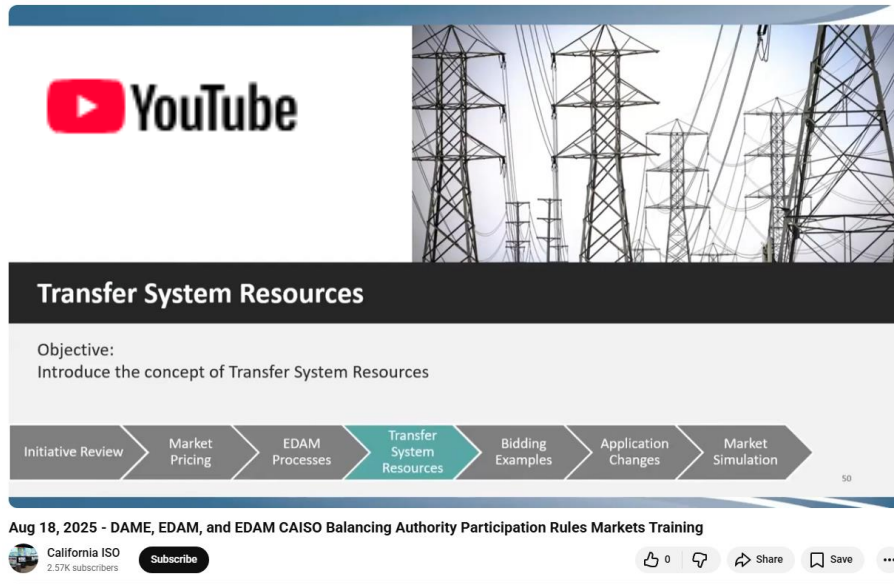
**Type 2:**  
Non RSE-  
Eligible  
Released  
Transmission  
Capacity

**Type 4:**  
Non RSE-  
Eligible  
Transfer  
Capacity

- Transfers System Resources for exports from CAISO BAA to PAC BAA, will contribute to PAC's Resource Sufficiency Evaluations (RSE)
- Transfers System Resources for exports from PAC BAA to CAISO BAA, will contribute to CAISO's Resource Sufficiency Evaluations (RSE)

# Need more details on Transfer System Resources?

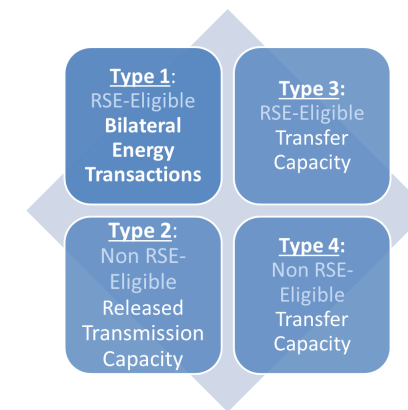
Recording of Aug 18, 2025 Training



[Market Training: DAME, EDAM, and EDAM CAISO BAA Participation Rules](#)

**Upcoming Mar 10, 2026 SIBR Training**  
(Tentative)

- Walk through of complex bid-submission scenarios—including TSR Types 1–4, transient TSRs, contract reference numbers, and transfer capacity limits—and show how to resolve common errors step-by-step



## Other resources



### EDAM FAQ Guide



### (NEW) EDAM Resource Guide



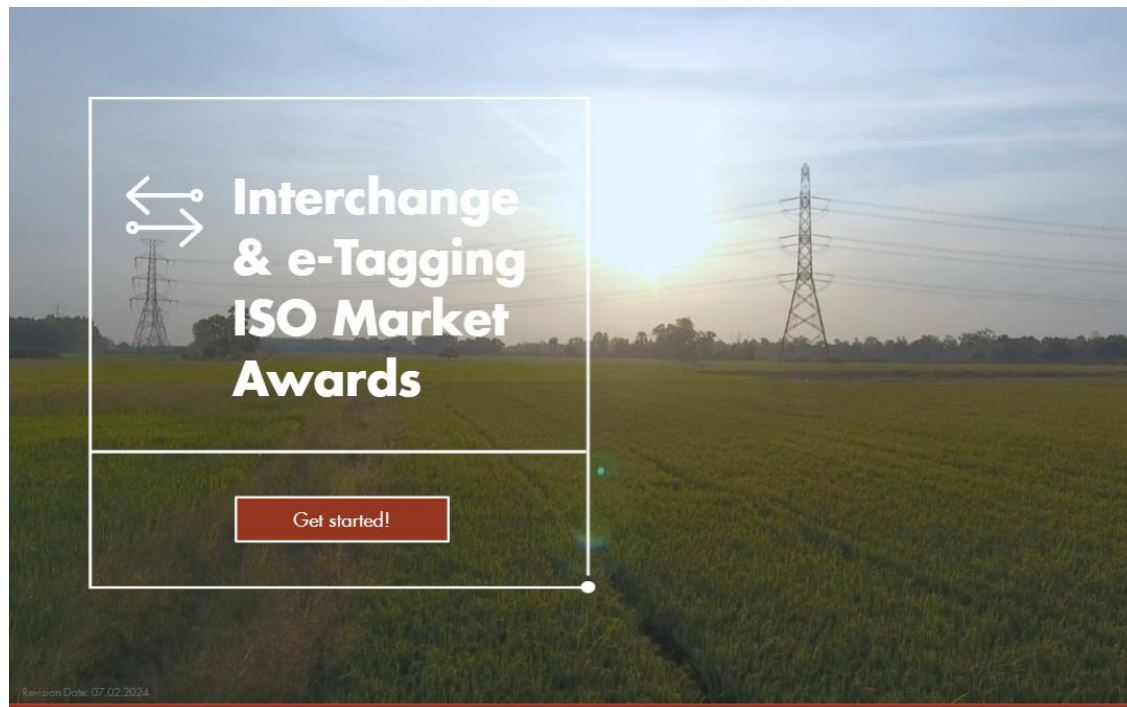
Questions? Please email  
[CustomerReadiness@caiso.com](mailto:CustomerReadiness@caiso.com)



# Tagging CBTs on CAISO Website and WEIM Portal



## ISO Training Center



## WEIM Portal



# Upcoming EDAM Training Opportunities

## Training Courses

### **February 26 (TENT): SIBR Fundamentals**

- This training will explore the core interface, walk through submitting and validating Energy and AS bids, and review the resulting outputs.
- Target Audience: SIBR users

### **March 10 (TENT): SIBR Advanced Bid Submission & Validation**

- This training provides walk through complex bid-submission scenarios—including TSR Types 1–4, transient TSRs, contract reference numbers, and transfer capacity limits—and show how to resolve common errors step-by-step
- Target Audience: SIBR users

### **April 14: DAME, EDAM, and EDAM CAISO Balancing Authority Rules Markets Training (Refresher)**

- This refresher training covers the **market-related changes** for DAME, EDAM, and EDAM ISO BAA Participation Rules
- Target Audience: ISO BA and EDAM customers that participate in the Day-Ahead Market

### **April 16: DAME, EDAM, and EDAM CAISO Balancing Authority Rules Settlements Training**

- This refresher training covers the **settlements-related changes** for DAME, EDAM, and EDAM ISO BAA Participation Rules
- Target Audience: ISO BA and EDAM customers that participate in the Day-Ahead Market



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The California ISO is committed to providing our customers with a broad menu of high-quality training courses on the ISO market functionality, as well as individual market applications. These self-paced courses are organized into training topics that are designed to be an industry resource for market participants and the general public to learn about electric grids and markets, and the ISO's role in the electricity system.

**On this page**

- [Upcoming meetings](#)
- [Topics](#)
- [Recent materials](#)

#### Upcoming meetings

ONLINE

Session 2 - New CAISO Website Overview Webinar Training

05/29/2024 10:00 AM - 11:00 AM

#### Training topics

Click on a training topic to view the available courses. Our courses are intended for market participants and the general public. Please note, course content is subject to change based on the implementation of new market functionality, rules, or processes.

- Releases, initiatives and readiness notes
- Markets and operations
- Settlements and metering
- Computer-based training library
- Scheduling coordinator
- Western Energy Imbalance Market**
- Congestion revenue rights
- Reference

#### Recent materials

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## Computer-Based Training Courses:

- EDAM Overview Video
- EDAM Processes & Timelines
- EDAM Pricing Model
- EDAM GHG Regulation Obligations
- EDAM Bidding: Basic Concepts
- EDAM Integration with WEIM



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**Instructor:** Beau

**Training course:** EDAM Training for Intertie Scheduling Readiness

# Thank you for your participation!



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- Submit a [CIDI ticket](#)
- Contact your Scheduling Coordinator
- Use the “[Contact us](#)” page on caiso.com to submit questions

# Questions

