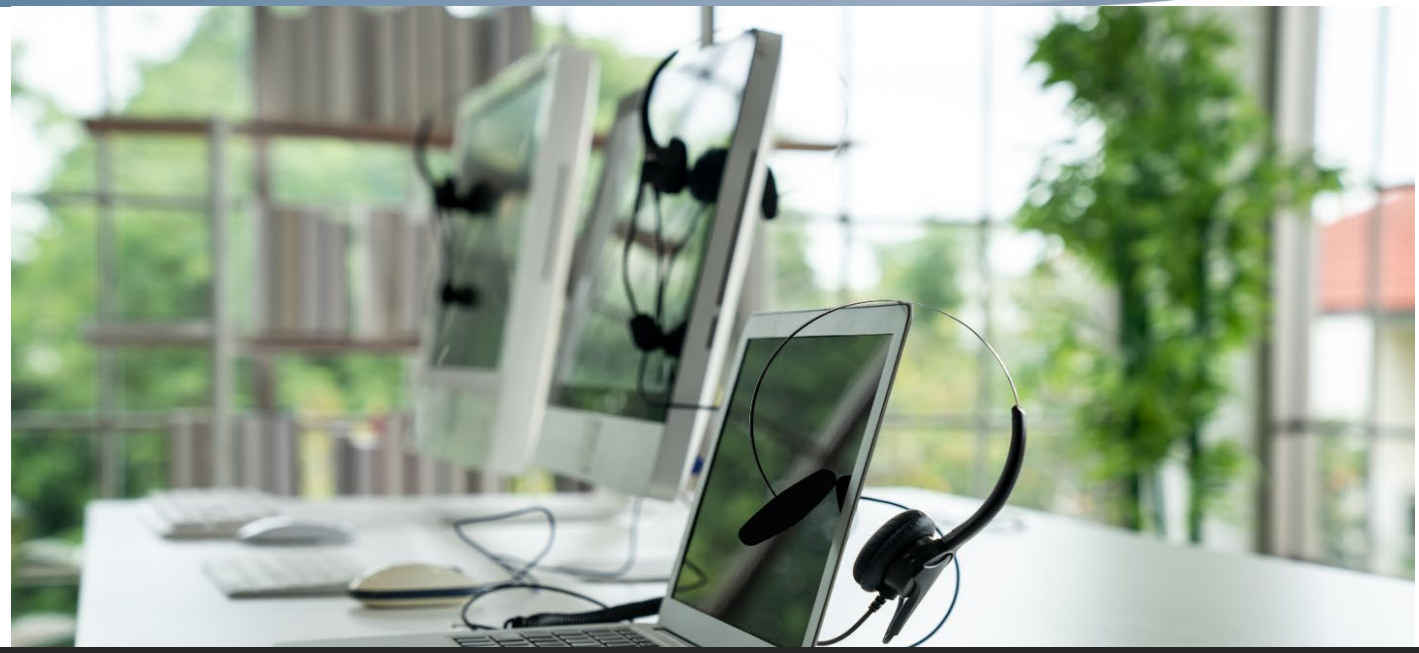
California ISO



New Resource Implementation Forum

Welcome

Our presentation will begin shortly.

Today's Presenters:
Kelsey Ajax, Manager - Model & Contract Implementation
Marissa Arechavaleta - Lead Resource Implementation Analyst
Beverly Cline – Sr Resource Implementation Analyst
Nura Nasser - Resource Implementation Analyst

3rd NRI Stakeholder Forum

Goals for this Forum:

- Share knowledge and best practices
- Preview upcoming improvements and requirements
- Increase awareness of available resources, training, and support channels.

We appreciate your collaboration as we strive to continuously improve for our customers and the reliability of the system.

Agenda

New Resource Implementation

- 2026 at a Glance
- NRI Process Goals
- Things to Have Before Starting
- Implementation Deposit
- MMA
- FNM Changes
- GO Registration

Control and Protection:

- Protection and Control Standard Requirements Revisions

Outage Card Operations

- Desktop procedure expectations

Metering and Telemetry:

- Overview
- BPM Updates
- Documents & Notifications
- Telemetry Validation
- Telemetry Non-Compliance/Exemptions

Forecasting

- VER Forecasting Documents in RIMS and Forecast Creation

RIMS Improvements

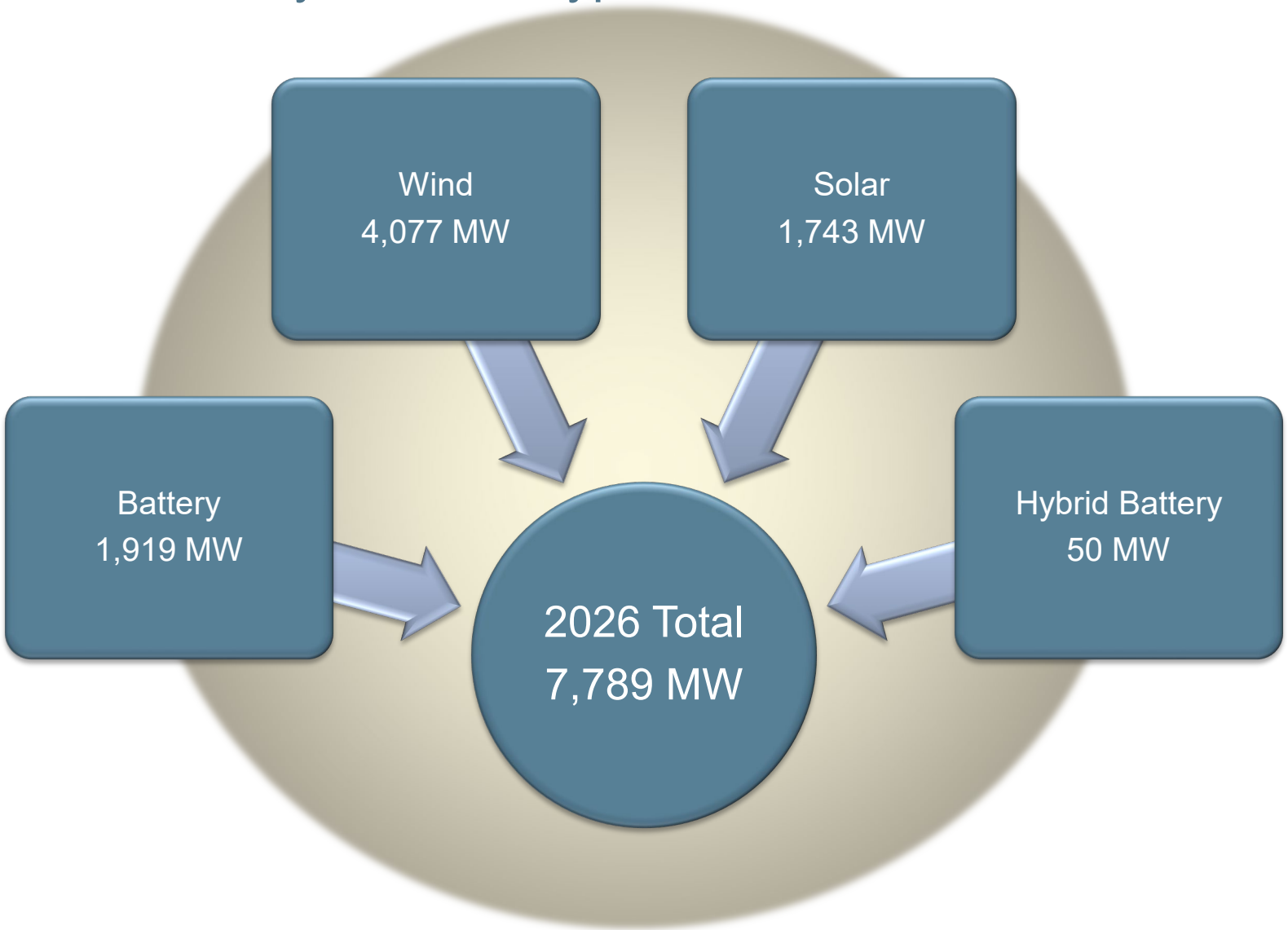
- 2026 RIMS at a glance
- RIMS Improvements – Resource and Transmission Implementation
- Stakeholder Feedback

NRI Office Hours

NRI Updates

- 2026 at a Glance
- NRI Process Goals
- Things to Have Before Starting
- Implementation Deposit
- MMA
- FNM Changes
- NERC Registration

2026 year-to-date COD by resource type



New Resource Implementation Goals

<u>Our Goal</u>: Efficiently implement reliable resources into the CAISO market through effective resource validation and integration.

- Verify each new resource enters the market correctly, following FERC and NERC standards, and the CAISO Tariff and BPMs, with the ability to operate reliably.
  - ❖ ***Reliable operation is key to the CAISO's core responsibility as a balancing authority.***
- Provide a clear, process for customers to enter the market following the above referenced standards.
- Provide support for customers participating in the market.
- Manage a fair environment where new resources can enter the market and operate commercially.
  - ❖ **The CAISO is committed to moving projects in an orderly manner from initial request to Commercial Operation. We want to help!**

Before Starting the NRI Process

These requirements should be considered prior to starting the NRI Process

- ✓ Have an executed Interconnection Agreement.
- ✓ Resources should be construction ready.
- ✓ Review FNM schedule and Bucket timelines to ensure that project schedule is feasible.
  - ❖ ***Projects should <u>not</u> count on expedited reviews or escalations to reach project milestones***
- ✓ Achieving CAISO commercial operations approval means your project is ready to operate in the market. Make sure your construction and contractual schedules line up with this.
  - ❖ ***Resource Adequacy timelines are not factored into the NRI process***

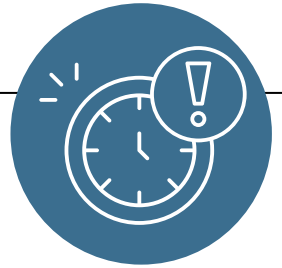
NRI Documentation Clarification Effort

SCME Process	SCME Process Transition into RIMS
DERA Process	DERA process documentation updates
Control & Protection	Addition of 2 new buckets and requirement expectations Common submission errors
Network Application Information	Common submission errors
PSLF	Common submission errors
Meter Maintenance Form	Addition of new bucket item within RIMS

Reminders

Review

Review the NRI checklist for bucket submissions and timeline reviews



Deadlines

The bucket deadline represents the document acceptance deadline, not the document submission deadline.

Timing

Sync/COD requests can take up to 10 business days to review. Please note projects are reviewed in the order in which the request was received.

Help!

New Resource Implementation training from last year

- Presentation - New Resource Implementation - Market Participant Asset Implementation - May 1, 2024
- Video - New Resource Implementation Stakeholder Meeting - May 1, 2024

Computer Based Training for Markets and Operations

- Project Type Overview: Scheduling Coordinator Meter Entity (SCME)
- Project Type Overview: Distributed Energy Resource Aggregate (DERA)
- Resource Owners/Operators Desk Reference Guide

Implementation Deposit
CAISO Tariff Appendix DD Section 13.3.1 Implementation Deposit

3 Party LGIA

- Effective for all Projects executed after 12/17/2024
- $35,000 deposit due at the time LGIA is signed
- Deposit covers QM and NRI activities
- Does not cover MMA or LOS deposits

2 Party LGIA

- Effective for all Projects regardless of execution date
- $6,000 deposit due at the time NRI project is created
- After project is created, email will be sent with deposit information
- Deposit must be received within 30 days of project creation to avoid project being placed on HOLD.
- Deposit covers NRI activities
- Does not cover MMA or LOS deposits

Material Modification Assessment & NRI Process Improvement

CAISO recognizes customer concerns with MMA approval timelines

New process will allow the NRI Process to begin once the MMA is deemed valid by the PTO

Expected to reduce NRI start times by 1–2 months

Synch approval still requires a fully approved MMA

Modeled resource data must accurately reflect field construction and the final approved MMA; CAISO will verify alignment as part of the Synch approval

Full Network Model Submission

California ISO

2027 Schedules for Full Network Model Database Release

The California ISO's Full Network Model (FNM) implementation process has specific critical dates to meet in order to include corresponding changes to the Full Network Model. The FNM database releases are listed in Table 1.

Table 1 - Model Schedule

FNM Label	Customer Model Document Acceptance Deadline[1]	ISO Publishes Final Scope[2]	Late Model Scope Change Request Deadline[3]	Production Deployment[4 5]	Earliest Project Sync/Energization Date[6]
27M2_DB145	11/18/2026	12/9/2026	12/18/2026	Week of 2/8/2027	2/25/2027
27M4_DB146	1/20/2027	2/10/2027	2/26/2027	Week of 4/12/2027	4/29/2027
27M6_DB147	3/24/2027	4/14/2027	4/23/2027	Week of 6/14/2027	7/1/2027
27M8_DB148	5/19/2027	6/9/2027	6/25/2027	Week of 8/9/2027	8/26/2027
27M10_DB149	7/21/2027	8/11/2027	8/27/2027	Week of 10/11/2027	10/28/2027
27M12_DB150	9/22/2027	10/13/2027	10/22/2027	Week of 12/13/2027	12/30/2027

Notes:

[1]All completed model documents must be accepted by 5 PM (PT) on the accepted deadline dates for the ISO to consider it for the scope of the corresponding FNM model build. Documents will be reviewed in the order received. For CAISO BA generation projects, see the Bucket 1 requirements on the NRI Checklist. For CAISO BA transmission projects, see the Bundle 1 requirements on the Transmission Asset Implementation Guide.

[2]ISO Published Final Scope – The ISO will publish the final approved scope after considering submissions for completeness, timeliness and available ISO bandwidth to build the model. Final scopes are published on the Network and resource modeling Webpage under the Network model changes section. Any projects not on the published scope document should be considered not approved for that model.

[3] Late Scope Change Request Policy – Late scope change requests are strictly reserved for addressing reliability-related or critical compliance requirements. To ensure adherence to established project timelines and equitable support for projects that met the model document submission deadlines, requests involving the addition of new resources or modification of existing resources (for example. RIG Changes, Pmax projects, etc.) approved after the model document acceptance deadline will not be considered eligible under the late model scope change process.
The Late Model Scope Change Request Form with all fields completed must be submitted by 5 PM (PT) on the request deadline dates to be reviewed for the scope of the corresponding FNM model build. **Submission of this form does not guarantee inclusion in the requested FNM model build.** The updated scope, including all approved changes, will be re-published prior to the Production deployment.

[4]The week that the ISO is targeting to deploy the FNM build. A Master File data freeze[5] will occur during this time.

[5]Master File data freeze – There will be a period during which no changes to the Master File data can be made, starting 2 days before the model's deployment date. Changes can resume after the model is deployed, following the usual timeline of 5 to 11 business days. A market notice will be sent one week prior to the Production deployment date.

[6]Earliest Project Sync/Energization Date is a RIMS system requirement and is designed to avoid energization or sync conflicts for projects that may result due to potential model deployment delays. For generation projects, this date is the earliest date a resource could reach Sync or have an effective SC Association in MF. For transmission projects, this date is the date that the project will be energized in the field. **The ISO recommends that all projects that have a Sync/Energization Date no earlier than this date.**

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[2027 Full Network Model Schedule]

- Significant increase in new assets across the RCWest/WEM footprint
- FNM Build scope continues to grow, impacting deployment timelines
- Late scope requests limited to reliability related changes
- New resources and resource changes (e.g., RIG, Pmax) typically ineligible after the late scope deadline
- All bucket documents must be approved before the acceptance deadline

NERC GO/GOP Registration

Increased focus on GO/GOP registration compliance.

Effort to improve CAISO-WECC visibility and coordination.

Short Term: Collect GO/GOP registration status via the IC Status Report form. This will include **Registered Entity Name** and **NCR Number**

Align records and support GO/GOP registration tracking at COM/COD

Long Term: Evaluate GO/GOP verification as a COM/COD prerequisite through IPE 6.0.

Wrap Up