NRI Feedback Themes and Improvements
October 2025

Welcome

Our presentation will begin shortly.

Today's Presenter: Kelsey Ajax, Manager, Model and Contract Implementation
Andrew Brown, Operations Project Coordinator Lead

Housekeeping

This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.

Attendees are muted to minimize background noise

Please keep comments professional and respectful.

Please try to be brief and refrain from repeating what has already been said so that we can manage this time efficiently.

Virtual Participation on the Webex

Click the raise hand icon located on the bottom middle of your screen.

State your full name and affiliation before making your comment.

Transparency View list is available to view participants logged into the Webex.

2nd NRI Stakeholder Forum

- **Goals for this Forum:**
  - Connect for collaborate on recent challenges
  - Knowledge sharing
  - Preview up and coming improvements/requirements
  - Strive to make this different evolve from last year, so please reference last years presentation for overview of NRI process if you are new to the process

Agenda
- **NRI Feedback Themes**
  - Communication: Structure change
  - Documentation: GRDT, Helpful Links
  - Timelines: C&P, COD Approvals
  - RIMS: Hybrid 2C; looking forward
- **Control and Protection:**
  - Submission Guidance
- **Metering and Telemetry:**
  - Responsibilities
  - NRI submission guidance, Telemetry Exemptions
  - Documentation: P2P and 72 Hour Check Procedures
- **Pre-COD Resource Performance**
  - Clarify Process
  - Documentation: Pre-COD resource performance process
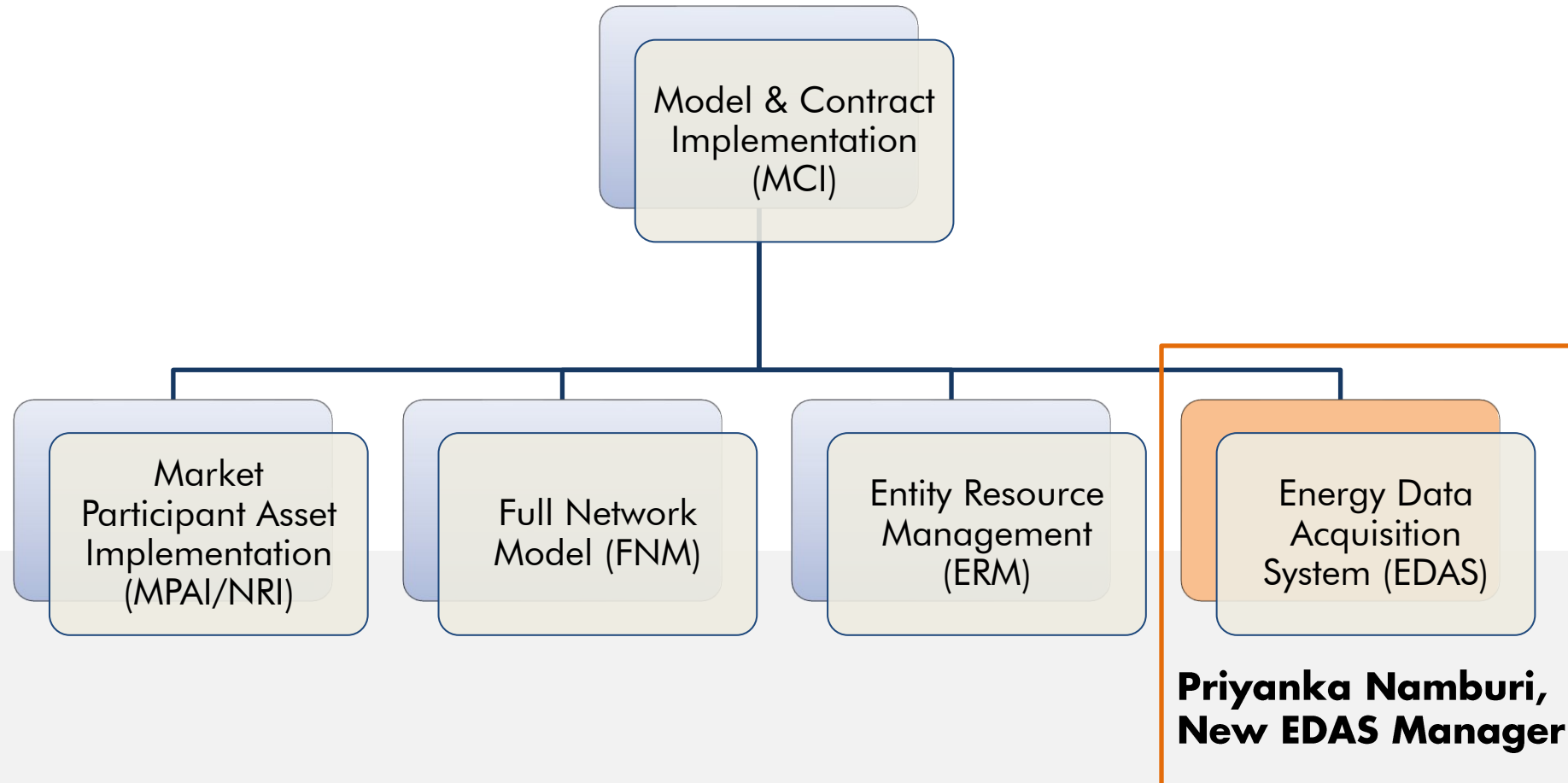 - User Support/Documentation: 5320B

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

Structure Changes

MCI/EDAS
NRI Representatives

Model & Contract Implementation Structure Change

Key Contacts: New Resource Implementation

- ## Andrew Brown
  - Operations Project Coordinator Lead
- ## Danial Bickley *new*
  - Operations Project Coordinator Lead
- ## Beverly Cline
  - Resource Implementation Analyst
- ## Nura Nasser
  - New Resource Implementation Assistant
- ## Amanda Morgan *new*
  - New Resource Implementation Assistant
- ## Hiring one additional spot

Exploring improvements to email tracking and follow-up through new technology, shifting responsibilities

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NRI Updates and Improvements

NRI Process Goals
Current Impacts
Things to Have Before Starting

New Resource Implementation Goals

Our Goal: 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!**
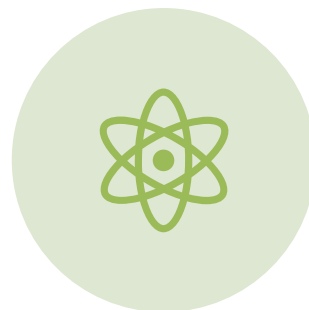
Current NRI Process Impacts

INCREASE IN NUMBER OF PROJECTS ENTERING THE NRI PROCESS.

RAPIDLY INCREASING COMPLEXITY OF NEW PROJECTS.

INCREASE IN ENERGY DEMANDS AND RESOURCE ADEQUACY REQUIREMENTS.

ELIMINATION OF FEDERAL TAX CREDITS PUTTING PRESSURE ON COMPLETION TIMELINES
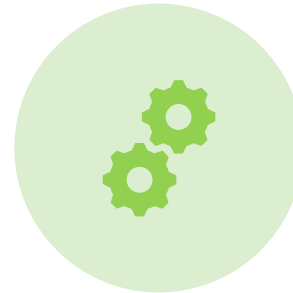
Before Starting the NRI Process

These requirements should be considered prior to starting the NRI Process

✓ Have an executed Interconnection Agreement.

✓ No open MMAs or anticipated MMAs during the NRI Process.

✓ 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***

Material Modification Requests

Material Modification Request should be completed prior to starting the NRI process

Starting an MMA during the NRI process can result in a project being placed on hold

Please take into account the time to complete an MMA into project schedule

Use equipment lead times to complete the MMA process to avoid delays

Generator Resource Data Template (GRDT)

Improvements made to this process are available on the NRI webpage in the Bucket 3 section for Resource entity management

- A guidebook for assistance in preparing the Final GRDT.
  - Guidebook highlights the information required for submission in Bucket 3.
  - Includes a link to the GRDT definitions document.
- An example Bucket 3 GRDT with tips for how to populate each column.
- Sample template for GRDT explanation document.

- Resource entity management
  - The scheduling coordinator must review and submit the final version of the Generator Resource Data Template (GRDT) [XLS] on behalf of the legal owner/developer. An example GRDT [XLS] is available for reference.
  - The GRDT Explanation document should be submitted that explains how the resource characteristics were determined. Use the Sample Template for GRDT Explanation [XLS] as a reference.
  - Refer to Guidebook for Bucket 3 Final GRDT preparation [DOC] for assistance in preparing the Final GRDT.

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Guidebook for Final GRDT Preparation and Sample GRDT

Resource tab:

All the columns in the Resource worksheet tab are listed in the following table though only a small subset of fields are required at this point. These required fields are listed in **blue bold** text. Fields that are not bolded will be populated by CAISO with default values or left blank as needed.

RDT FIELD	Contents
PGA NAME	Should match the Legal Name in the project details form.
SCID	Can be left null if unknown. CAISO will populate based on SC Acceptance and Owner letters
RESOURCE ID	Must match the RIMS project page.
RESOURCE NAME	Should match the RIMS project name.
RES TYPE	GEN (Generator or Non-generator [aka NGR or Battery]) TG (Dynamic Import or Pseudo)

PGA Name	Scheduling Coordinator ID	Resource ID	Resource Name	Resource Type	Aggregate?	Demand Response Type	Slow Demand Response	Energy Type	Fuel Type	Prime Mover Technology
PGA_NAME	SC_ID	RES_ID	RES_NAME	RES_TYPE	AGGREGATE_YN	DR_TYPE	SLOW_DR	ENERGY_TYPE	FUEL_TYPE	GEN_TECH_TYPE
Delete this row before uploading the GRDT										
Should match the Legal Name in the project details form.	*Can be left null if unknown.* *CAISO will populate based on SC Acceptance and Owner letters*	*Must match the RIMS project page.*	*Should match the RIMS project name*	*GEN [Generator or NGR (Battery)]* *or* *TG (Dynamic Import or Pseudo)*	*Y or N* *CAISO will populate based on the modeled resource.*	*Leave null* *Applicable to DR resources only*	*Leave null* *Applicable to DR resources only*	*Leave null* *CAISO will populate as appropriate*	*Should match the RIMS project page* *Refer to GRDT and IRDT Definitions document for full list of available fuel types.*	*Use 'OTHR' if fuel type is HYBD, LESR, WIND, or if technology type is not included in the list of available technologies.* *Refer to GRDT and IRDT Definitions document for full list of available technology types.*

Instruction | Definition-GRDT | Code | RESOURCE | RAMPRATE | HEATRATE | STARTUP | FORBIDDEN OPR REGION | REGULATION

Changes to Review Timelines

Document Review timeline changed from 10 business days to 15 business days

Control and Protection timelines now have a review timeline of 30 days

Due to increased size and complexity of document review

More information in the next presentation

COD Reviews now at 10 business days

Business Unit reviews may take up to 10 business days to complete review, working to update RIMS message to 10 days

EDAS 72 hour telemetry review may exceed 10 business days

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](#)

RIMS Enhancements

- Short Term Forecasting Module rollout
  - Current RIMS framework is at end of life, STF Module built on future framework
  - Issues related to external user access and variety of GIS software
- SCME Process moving into RIMS

Project Type Overview: Scheduling Coordinator Meter Entity (SCME)
Available on CAISO.com

Looking Forward

- Working through requirements for 2026 Updates for RIMS
  - Update COD Projected Date Calculations
  - Control and Protection required documents
  - Bucket 6
    - PTO COD Letter
    - COM Plan
    - 72 hour Telemetry tracking

BUCKET 6		5/7/2025
Bucket Item Name	Required?	File Accepted
PTO COD Approval	Yes	No
COM Plan	Yes	No
72 Hour Test	Yes	No

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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 covers NRI activities
  - Does not cover MMA or LOS deposits

Wrap Up

Structure change
GRDT
Helpful Links
Dates: C&P, COD Approvals
RIMS: Hybrid 2C; looking forward

Thank you for your participation!

For more detailed information on anything presented, please visit our website at:
www.caiso.com or send an email to: CustomerReadiness@caiso.com.

For resource specific questions or concerns, please submit a CIDI ticket.