Release User Group

October 27, 2026 *10:00 a.m.–11:00 a.m.* *(Pacific Time)*

Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publicly available on the ISO web page for a limited time following the meetings. The recordings, and any related transcriptions, should not be reprinted without the ISO's permission.
https://www.caiso.com/meetings-events/topics/release-users-group-rug
http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx

Agenda

- Technical Updates
- Release Updates

Technical Updates

Technical Updates Agenda

Topic	Facilitator
OASIS Technical Specification Updates	Senthil Balasubramanian
webOMS Updates	Harleen Kaur
CRR Release v5.0.1	Eureka Cullado
Masterfile Release Updates	Jorge Gonzales

Topic – Previously Covered, left for reference	Facilitator
webLineR new APIs Update	Nalini Chari

Topic – Upcoming	Facilitator
CIRA Technology Upgrade	Akm Ferdous

OASIS Technical Specification

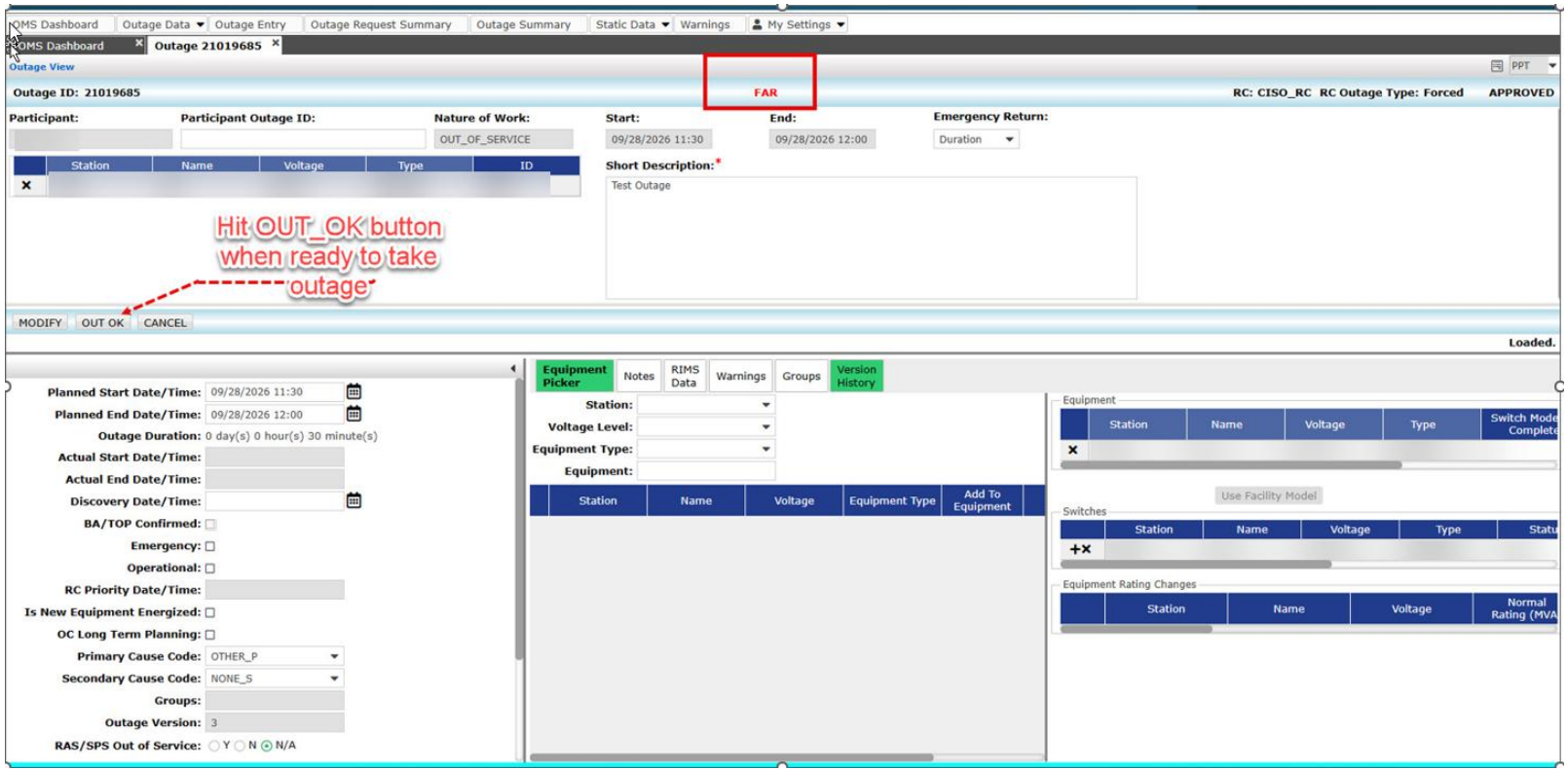
- Published OASIS Technical Specification Version **7.7.5**
  - EDAM Enhancements 2026
    - Updated OASISReport_v1.xsd to include enumeration for Transmission Interface Usage report
    - Element Table is updated for Transmission Interface Usage report

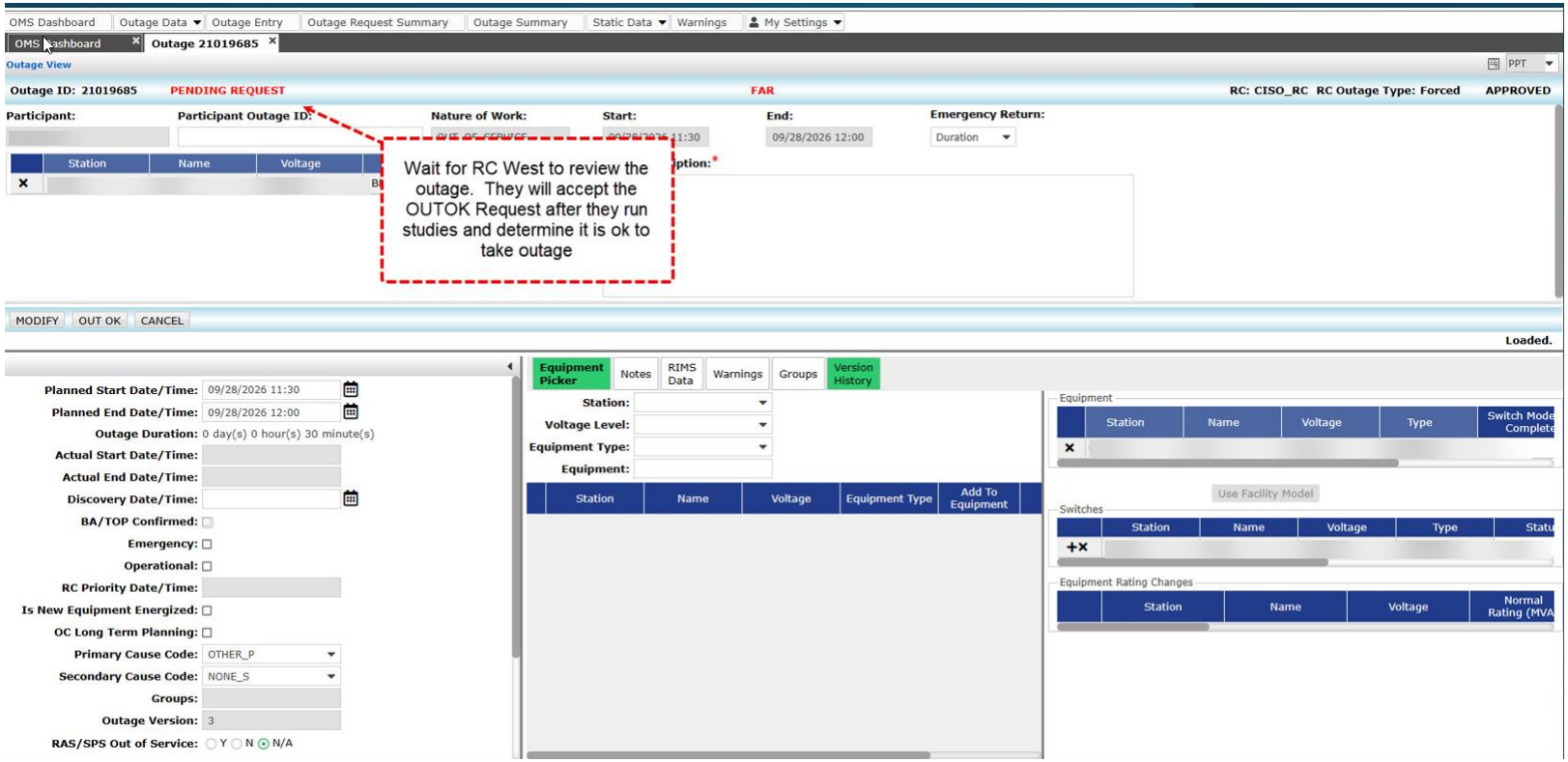
- Updated Technical Specification Version 7.7.5 can be found at
  - **Clean**
    - https://developer.caiso.com/Artifacts/OASIS/TechSpecs/OASIS%20Interface%20Specification%20v7.7.5.pdf
  - **Redline**
    - https://developer.caiso.com/Artifacts/OASIS/TechSpecs/OASIS%20Interface%20Specification%20v7.7.5_REDLINE.pdf

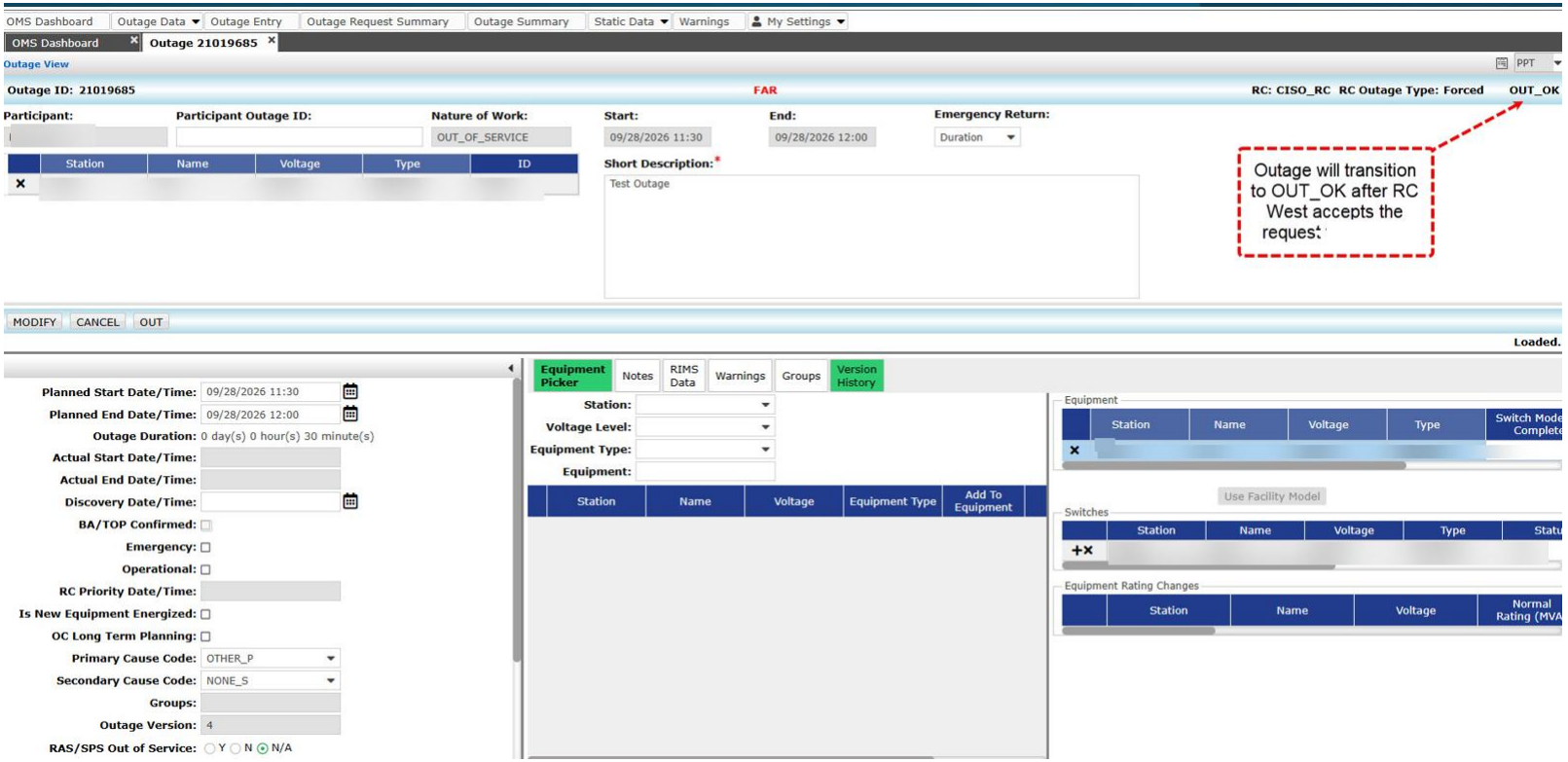
webOMS - Changes to Start the FAR outages

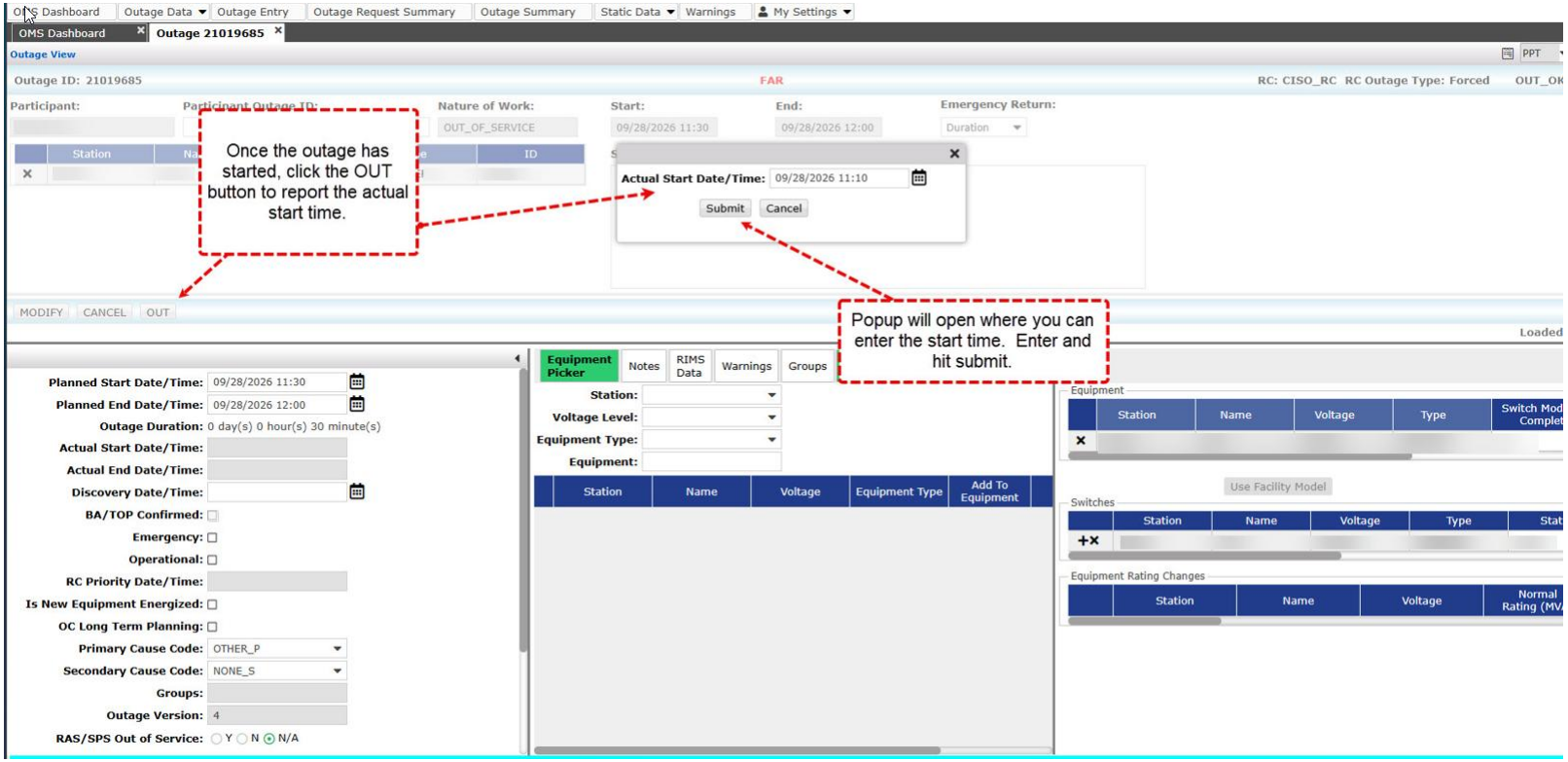
- Detail: Change to communicating outages that require RC preclearance approval, using webOMS FAR functionality
- Outage Type: Transmission Outages.
- Outage Origin: RC_CASIO
- Approval Type: Final Approval Required (FAR)
- No changes to XSD
- Map stage Deployment : 11/17/2026
- Production Activation: 01/04/2027

When using UI - operators use buttons within the outage card to communicate with RC West webOMS




OMS Dashboard
Outage Data
Outage Entry
Outage Request Summary
Outage Summary
Static Data
Warnings
My Settings
Outage 21019685
Outage View
PPT
Outage ID: 21019685
PENDING REQUEST
FAR
RC: CISO_RC RC Outage Type: Forced
APPROVED
Participant:
Participant Outage ID:
Nature of Work:
Start:
End:
Emergency Return:
09/28/2026 12:00
Duration
Station
Name
Voltage
Wait for RC West to review the outage. They will accept the OUTOK Request after they run studies and determine it is ok to take outage
MODIFY
OUT OK
CANCEL
Loaded.
Planned Start Date/Time: 09/28/2026 11:30
Planned End Date/Time: 09/28/2026 12:00
Outage Duration: 0 day(s) 0 hour(s) 30 minute(s)
Actual Start Date/Time:
Actual End Date/Time:
Discovery Date/Time:
BA/TOP Confirmed:
Emergency:
Operational:
RC Priority Date/Time:
Is New Equipment Energized:
OC Long Term Planning:
Primary Cause Code: OTHER_P
Secondary Cause Code: NONE_S
Groups:
Outage Version: 3
RAS/SPS Out of Service: Y N N/A
Equipment Picker
Notes
RIMS Data
Warnings
Groups
Version History
Station:
Voltage Level:
Equipment Type:
Equipment:
Station
Name
Voltage
Equipment Type
Add To Equipment
Equipment
Station
Name
Voltage
Type
Switch Mode Complete
Use Facility Model
Switches
Station
Name
Voltage
Type
Equipment Rating Changes
Station
Name
Voltage
Normal Rating (MVA

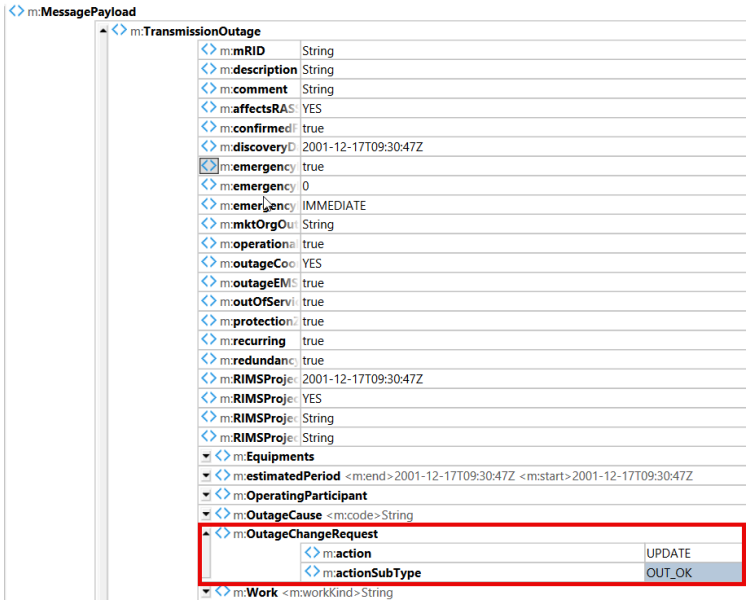

OMS Dashboard
Outage Data
Outage Entry
Outage Request Summary
Outage Summary
Static Data
Warnings
My Settings
OMS Dashboard
Outage 21019685
Outage View
PPT
Outage ID: 21019685
FAR
RC: CISO_RC RC Outage Type: Forced
OUT_OK
Participant:
Participant Outage ID:
Nature of Work:
OUT_OF_SERVICE
Start:
09/28/2026 11:30
End:
09/28/2026 12:00
Emergency Return:
Duration
Station
Name
Voltage
Type
ID
Short Description:*
Test Outage
Outage will transition to OUT_OK after RC West accepts the request
MODIFY
CANCEL
OUT
Loaded.
Planned Start Date/Time:
09/28/2026 11:30
Planned End Date/Time:
09/28/2026 12:00
Outage Duration:
0 day(s) 0 hour(s) 30 minute(s)
Actual Start Date/Time:
Actual End Date/Time:
Discovery Date/Time:
BA/TOP Confirmed:
Emergency:
Operational:
RC Priority Date/Time:
Is New Equipment Energized:
OC Long Term Planning:
Primary Cause Code:
OTHER_P
Secondary Cause Code:
NONE_S
Groups:
Outage Version:
4
RAS/SPS Out of Service:
Y
N
N/A
Equipment Picker
Notes
RIMS Data
Warnings
Groups
Version History
Station:
Voltage Level:
Equipment Type:
Equipment:
Station
Name
Voltage
Equipment Type
Add To Equipment
Equipment
Station
Name
Voltage
Type
Switch Mode Complete
Use Facility Model
Switches
Station
Name
Voltage
Type
Equipment Rating Changes
Station
Name
Voltage
Normal Rating (MVA


Once the outage has started, click the OUT button to report the actual start time.
Popup will open where you can enter the start time. Enter and hit submit.
Actual Start Date/Time: 09/28/2026 11:10
Submit
Cancel
MODIFY
CANCEL
OUT
Planned Start Date/Time: 09/28/2026 11:30
Planned End Date/Time: 09/28/2026 12:00
Outage Duration: 0 day(s) 0 hour(s) 30 minute(s)
Actual Start Date/Time:
Actual End Date/Time:
Discovery Date/Time:
BA/TOP Confirmed:
Emergency:
Operational:
RC Priority Date/Time:
Is New Equipment Energized:
OC Long Term Planning:
Primary Cause Code: OTHER_P
Secondary Cause Code: NONE_S
Groups:
Outage Version: 4
RAS/SPS Out of Service: Y N N/A
Equipment Picker
Notes
RIMS Data
Warnings
Groups
Station:
Voltage Level:
Equipment Type:
Equipment:
Station
Name
Voltage
Equipment Type
Add To Equipment
Use Facility Model
Switches
Equipment Rating Changes

API - Submit Transmission Outage Change Requests to communicate with RC West webOMS

- Submit the change request with the below values.

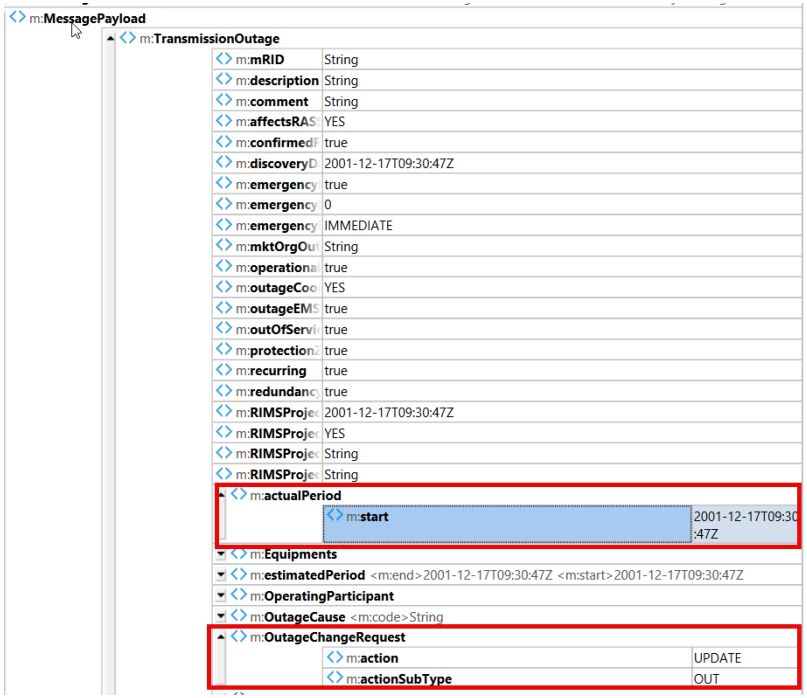
Outage Change Request-OUT_OK



API - Submit Transmission Outage Change Requests

Outage Change Request-OUT

Actual Period- Actual Outage Start Date and Time



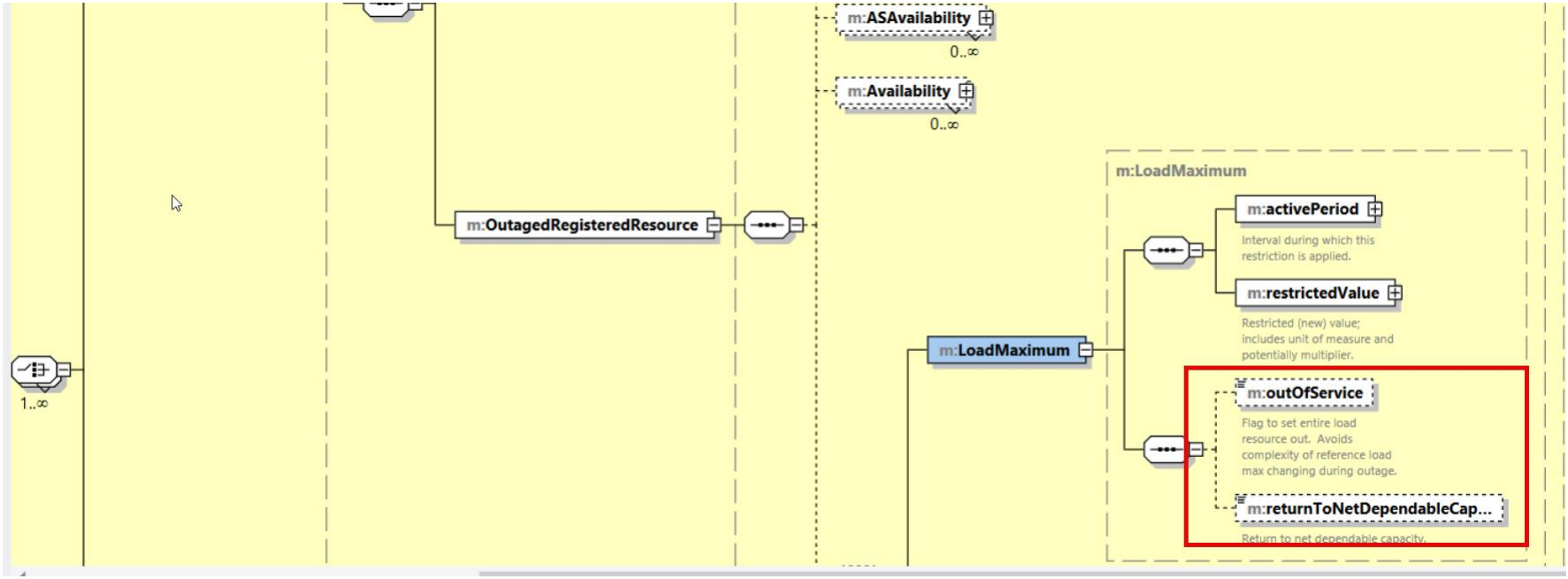
webOMS - API Update for Registered Resource Outages

Services:

RetrieveRegisteredResourceOutageService_v3,
RetrieveRegisteredResourceOutageChangeRequestService_v3

- Load Maximum- Enabled fields “Out Of Service” and “Return to Net Dependable Capacity”(NDC) in the response
- No change to XSD
- Map Stage: Deployed on 10/22/2026
- Production deployment: 11/02/2026
- Please submit a CIDI ticket in case of any issues or concerns

webOMS - API Update for Registered Resource Outages



CRR Application Release v5.0.1

Technology platform upgrades to align with CAISO technology standards, including migration to JDK 25 and Spring Boot 4.1

- Has no business or functional changes for CRR Market Participants
- The following remain unchanged:
  - User interface screens, navigation, and workflows
  - B2B API request and response formats for all endpoints
  - User authentication, access controls, and permissions
- MAP-Stage: Unavailable starting on 10/29/2026 (~2 weeks or less)
- Follow-up communication to be sent regarding its release schedule

Masterfile Release Updates for EDAM Enhancements 2026 - GHG

- For EDAM Enhancements 2026 GHG item
- GRDT Report version updated from 19.1 to 19.2
- RESOURCE tab
  - Added field **GHG Area** (optional read-only)
- GHG_EMISSION_RATE tab
  - Removed field **GHG Pseudo Tie**
- API version updated to v7
  - Submit and Retrieve services have been updated to support the above changes
- Technical specification v8.8.0
  - Will be published in the developer portal
- Note
  - The Retrieve endpoint response will include additional fields associated with the NERC Compliance TOP-002-5 and BAL-007 project planned for release in 2027

FERC 881 Track 3 webLineR: B2B Updates

Generic APIs

(**Newly added API services)*

#	B2B API Name	B2B API Description
1	queryFacilities	Retrieves facility data for specified entities or the entire CAISO facility model using the 'company' option. Supports full or partial facility details
2	queryLockoutStatus	Checks whether a seasonal ratings lockout is active before submission. Lockout periods occur when CAISO is generating the CIM file; during this time, users should not submit seasonal ratings.
3	aarExemptFacilities	Response is provided synchronously. Creates or updates AAR exemption records for facilities identified by TOPs as exempt from FERC Order 881 AAR submission requirements.
4	queryAarExemptFacilities	Retrieves facilities designated by their TOPs as exempt from FERC Order 881 AAR submission requirements.

FERC 881 Track 3 webLineR: B2B Updates

Ambient Adjusted Ratings (AAR) related APIs

(**Newly added API services)*

#	B2B API Name	B2B API Description
5	ratings	Submits rating profiles asynchronously to webLineR. Supports all CAISO rating types and components, including AARs, exception ratings, and overrides.
6	querySubmissionStatus	Retrieves the status of a previously submitted ratings request using the **submissionId** returned in the initial acknowledgment. The response also provides component profile IDs, which can be used in subsequent queries to retrieve component rating details.
7	queryCurrentRatings	Returns the current Best Available Value (BAV) ratings for selected facilities, including cleared (if available) or composite ratings.
8	queryComponentRatings	Retrieves rating component profiles previously submitted to webLineR for selected facilities.
9	queryComponentProfileID	Retrieves rating component profiles using profile ids that were previously submitted to webLineR for selected facilities
10	updateOverrideExceptions	Updates an existing exception or override rating profile, including rating values and effective dates. Changes trigger recalculation of the composite rating, while previous versions remain in history as inactive.
11	withdrawOverrideExceptions	Withdraws an active exception or override profile and recalculates the composite rating. Withdrawn profiles remain in history as inactive.
12	queryHistoricalCurrentRatings	Retrieves historical BAV ratings (cleared or composite) for selected facilities and rating types as they existed at a specified point in time. Responses are provided synchronously, subject to payload limits.
13	queryHistoricalComponentRatings	Retrieves historical submitted ratings for selected facilities and rating types as they existed at a specified point in time. Responses are provided synchronously, subject to payload limits. Tie-line requests require participant identification.

FERC 881 Track 3 webLineR: B2B Updates

Seasonal Ratings related APIs

(**Newly added API services)*

#	B2B API Name	B2B API Description
14	seasonalRatings	Submits seasonal ratings to webLineR for supported rating types (Normal, E1-E4) and seasons (Spring, Summer, Fall, Winter).
15	querySeasonalRatings	Retrieves active seasonal ratings for specified facilities, rating types, and seasons.
16	queryPendingSeasonalRatings	Retrieves pending seasonal ratings for specified facilities, rating types, and seasons.
17	queryDelayedSeasonalRatings	Retrieves delayed seasonal ratings for specified facilities, rating types, and seasons.
18	queryHistoricalActiveSeasonal Ratings	Retrieves historical seasonal ratings for specified facilities, rating types, and seasons.

Note

- ***Active Seasonal Ratings*** *involve changes only to the* ***Rating MW*** *value. These updates are immediately distributed to all downstream systems for use.*
- ***Pending Seasonal Ratings*** *involve changes to the* ***Duration MW*** *and, if applicable, the* ***Rating MW****. These updates are sent to the CAISO internal team for inclusion in the CIM file.*
- ***Delayed Seasonal Ratings*** *involve changes to the* ***Rating MW****,* ***Duration MW****, or both, with an effective date in the future. Once the specified effective date and time are reached, the rating automatically transitions to either an* ***Active*** *or* ***Pending Seasonal Rating****, as applicable.*

FERC 881 Track 3 webLineR Updates

- Market Sim for webLineR is currently on-going . The URLs are:
  - API: https://mapstage-api.caiso.com/transews/webliner
  - UI: https://mapstage-webliner.caiso.com

- We request market participants to submit computational methods used for rating calculation on the webLineR UI, as per FERC requirement.

- The following documents are available on the ISO Developer Site (https://developer.caiso.com/)
  - YAML file / HTML File for B2B services (V1.6.2 is available)
  - Best Practices document
  - webLineR Training & FAQ documents

- Upcoming Changes:
  - Map stage deployed 10/07/2026. Communication will be sent out with the final date.
  - Tentative production deployment date for Track 3 is 11/12/27. Once we have our internal approvals, communication will be sent out with the final date.

Release Updates

Release Plan Summary

Fall 2026 Release

EDAM Enhancements 2026

Independent 2026 Release

Contractual Share for Renewable Forecasting

FERC 881 Track 2: CRR – November

FERC 881 Track 3: AAR in Market Applications*

**effective date of Order No. 881 tariff under internal review*

Transmission Exchange Agreement Renegotiation

FERC 2023 Generator Interconnection Life Cycle

RC Forecast & Schedules Data Reporting Automation

Storage Design & Modeling

✓*Automatic Acceptance of Outage Change Requests*

Power Minimum Rerates on Test Energy Cards

Independent 2027 Release

NERC Compliance TOP-002-5 and BAL-007

Spring 2027 Release

Resource Adequacy Modeling & Program Design - Resource Visibility

Greenhouse Gas Coordination Accounting & Reporting

Resource and Transmission Implementation – Release 1 WEIM

Fall 2027 Release

EDAM Onboarding BANC

EDAM Onboarding LADWP

EDAM Onboarding PNM

EDAM Onboarding TID

Resource and Transmission Implementation – Release 2 WIM

Future Release

Settlements Transitional Measures & Overlapping Capacity

Settlement Upgrade Project

Enhanced Curtailment Calculator (ECC) Expansion for Western Interconnect SOL

Congestion Revenue Rights Enhancements – Jul ‘26 Board approved

EDAM Congestion Revenue Allocation

Gas Resource Management – Dec ’25 WEM GB approved

Storage Design & Modeling

Non-Linearity Solution for Non-Generator Resources

Improvements to Out-Of-Service Checkbox Functionality

Partial Outages for Non-Generation Services

Price Formation Enhancements

Resource and Transmission Implementation

FERC 917 – Electronic Quarterly Report

NERC Reliability Standard CIP-003-11

Fall 2026 Release

EDAM Enhancements 2026

Fall 2026 – EDAM Enhancements 2026

Business Opportunity	
What:	Enhancements to various systems for the purpose of : • Removing barriers to market participation by adding trading and scheduling • Providing equitable access to data for EDAM Entities
Who does this opportunity/problem impact:	EDAM Entities
BRS	**Version 1.1 – Upcoming 10/30/26** GHG **Version 1.0 – 08/17/26** Publish external BRS for 14 EDAM enhancements **Version 0.6 – 6/30/2026** Publish external BRS for the first two high priority enhancements, Inter-SC trading and ADS provision, support market Simulation timeline

Fall 2026 – EDAM Enhancements 2026 – Page 1 of 2

Information	Description	Market Sim Date	Planned Prod Date
InterSC Trades	Allow non-generating resources to participate in inter-SC trade and offer physical energy product in order to continue effective integration of higher capacities of energy storage and meet RA and GHG compliance goals.	Complete	Complete
Auto-provisioning ADS dispatch request	New role so that both EDAM and WEIM Entities can view all resource dispatches within their BAA on ADS	N/A	Complete
CMRI - RTUC Advisory Schedule Report in CMRI	For EDAM entities, we do not provide access to the HASP advisory information. There is an SC based report, in CMRI, but we need this report to be made available to the Entity, so they can mimic our capability in ITS with their systems.	N/A	Complete
CMRI - Capacity Allocations Report	Provide Entities a new CMRI report to support shadow settlement for Balanced Contracted Determinants related to Imbalance Reserve (IR) and Reliability Capacity (RC).	N/A	Complete
Transfer Location to ITC Mapping	Broadcast Tie to ITC mapping from MF to downstream systems Consume and Process Tie-ITC Mapping from MF in ITS	N/A	Complete
EDAM Entity DAM Data Access: BAAOP	Enable EDAM entities to access the set of Day-Ahead Market (DAM) User Interfaces within the BAAOP environment with functional equivalence to CAISO operator access Continue manually generate and post DAM result spreadsheets for EDAM entities, through secured website	N/A	11/19/2026
Manage Multiple GHG areas	All Existing BRQs in this section related to Multiple GHG Areas are already included in the EDAM BRS. Additional testing will still be required to accommodate Washington GHG activation.	November 2026	December 2026
Allow Entities to decrease AS bids from DA to RT	Change the SIBR validation rules to allow AS bid change in RT for non-CAISO EDAM Entities	N/A	Complete
Congestion and Transfer billing Determinants	Include all reportable settlement billing determinants related to the DA Congestion Offset (Charge Code 8704) and Type 1 EDAM Transfer Revenues (Charge Codes 8411 & 8470) in the EDAM Entity's MRI-S Settlement Statement.	11/4/2026	12/8/2026

Fall 2026 – EDAM Enhancements 2026 – Page 2 of 2

Information	Description	Market Sim Date	Planned Prod Date
EDAM Entity DAM Data Access: TSR	This service enables EDAM entities to access a detailed breakdown of how transmission customers plan to exercise their capacity, for Trading Hour, Transfer Location, CRN Reference, and SC: • The CRN capacity held by the customer (CRN) • Capacity exercised (EXR) • Capacity released (REL) • Capacity reserved (REV)	N/A	11/19/2026
SIBR RSE Capacity Report future dates and Real Time	Entities request that the RSE Capacity Report in SIBR be extended to show future dates (D2-D7). Entity customers with RSE obligations who would receive this information via the Entity support the request.	N/A	10/30/2026
OASIS transmission interface usage report	Entities and ISO teams request to have TSR schedules included with SR schedules (existing) in the Transmission Interface Usage report on OASIS (MIAF-2026-30, CIDI 297268)	11/4/2026	12/08/2026
EDAM Entity DAM Data Access: TCORs/ITCs	Enable Entities to view the limits they submit to PLC via a UI or a retrieve service. Current PLC implementation is only a pass through. PLC would need to be integrated with EMMS to retrieve the data	TBD	Q1 2027
EDAM Entity DAM Data Access: TDT/GRDT	Provide visibility to current, non-Entity SC GRDT and TDT. This will be broken into 2 parts. We will focus on part 1 in 2026.	TBD	Q1 2027
MVT External UI	Make MVT tool externally facing to support viewing and commenting on congestion for EDAM Entity. This scope is focused on communication and logging of the interactions, with associated access management.	TBD	Q1 2027
LACA/DACA Tools	• Advanced Voltage Control • AVR regulation for post- contingency • Offline RAS • DACA run abort • Activate RAS in OMS	TBD	Q1 2027

Fall 2026 – EDAM Enhancements 2026 Inter SC Trades

Project Information	Details
Scope Item	Inter-SC Trades and Associated CMRI Reports
Description	Enable inter-Scheduling Coordinator (SC) energy trading within EDAM and WEIM BAAs. Add IST final trade reporting from SIBR to CMRI for EDAM entity UI and API access. **Define Trading Hubs and resource association for EDAM and WEIM BAAs** For each EDAM BAA or WEIM BAA Define the one or more Trading Hubs • For CISO, keep existing two Trading Hubs • For EDAM BAA, allow EDAM entity to request one or more trading hubs, if the BAA only have one Trading hub, define trading hub on the DGAP • For EDAM BAA, allow EDAM entity to request trading location to be defined by Master File based up on specific supply resources • For the BAA is in both the EDAM and WEIM, the same Trading hubs are applicable for EDAM and WEIM • For the BAA is in WEIM only, define the trading hub include Participating resource and non-participating resources, same as for DGAP • the Generating resource in each EDAM or WEIM BAA must be associated with one and only one Trading Hub
Impacted Systems	MF, SIBR, CMRI
BRS	**Version 1.0 – 08/17/26** **Version 0.6 – 6/30/2026**
Market Simulation	**August 4, 2026 – August 21, 2026**
Production	**September 10, 2026 -COMPLETE**
BPM	**Publish PRR: Market Instruments, May 1, 2026**

Training Course	Date and time
Inter-SC Trades and Q&A Session (EDAM Enhancements 2026)	**August 27th, 2026 9:30 am - 11:00 am PST**

Fall 2026 – EDAM Enhancements 2026 ADS Dispatch

Project Information	Details
Scope Item	**Auto-provisioning ADS dispatch request**
Description	Develop new role so that both EDAM and WEIM Entities can view all resource dispatches within their BAA on ADS
Impacted Systems	ADS, AIM, RTM
BRS	**Version 1.0 – 08/17/26** **Version 0.6 – 6/30/2026**
Market Simulation	**N/A**
Production	**Complete**
BPM	**N/A**

Fall 2026 – EDAM Enhancements 2026 CMRI – RTUC Advisory Schedule Report in CMRI

Project Information	Details
Scope Item	**Entity RTUC Advisory Schedule Report in CMRI**
Description	For EDAM entities, we do not provide access to the HASP advisory information. There is an SC based report, in CMRI, but we need this report to be made available to the Entity, so they can mimic our capability in ITS with their systems. Report Title: **EIM Real-Time Unit Commitment (RTUC) Advisory Schedules** Navigation Path: External Entities > Energy Imbalance Market This report provides an Entity-level view of the RTUC Advisory Schedules for the operating day and prior 7 days. Instead of an SCID filter it contains a BAA level filter. Note: This information is made available to SCs in an existing report located on the Real-Time menu.
Impacted Systems	CMRI
BRS	**Version 1.0 – 08/17/26**
Tech Spec	**Version 6.7.9 - 08/28/26**
Market Simulation	**N/A**
Production	**September 30, 2026 - COMPLETE**
BPM	**N/A**

Fall 2026 – EDAM Enhancements 2026 CMRI - Capacity Allocations Report

Project Information	Details
Scope Item	**CMRI Capacity Allocations**
Description	Provide Entities a new CMRI report to support shadow settlement for Balanced Contracted Determinants related to Imbalance Reserve (IR) and Reliability Capacity (RC). Audience: EDAM SCs Report Title: **Auxiliary IR and RC Capacity** Navigation Path: Post Market This report provides SCs with capacity ranges by selected trade date, resources and by Imbalance Reserve and Reliability Capacity commodities.
Impacted Systems	ADS, AIM, RTM
BRS	**Version 1.0 – 08/17/26**
Tech Spec	**Version 6.7.9 - 08/28/26**
Market Simulation	**N/A**
Production	**September 30, 2026 - COMPLETE**
BPM	**N/A**

Fall 2026 – EDAM Enhancements 2026 ITS -Transfer Location to ITC Mapping

Project Information	Details
Scope Item	Transfer Location to ITC
Description	Broadcast Tie to ITC mapping from MF to downstream systems Consume and Process Tie-ITC Mapping from MF in ITS
Impacted Systems	MF, ITS
BRS	**Version 1.0 – 08/17/26** **Version 0.6 – 6/30/2026**
Tech Spec	**N/A**
Market Simulation	**N/A**
Production	**September 29, 2026 -COMPLETE**
BPM	**N/A**

Fall 2026 – EDAM Enhancements 2026 EDAM Entity DAM Data Access: BAAOP

Project Information	Details
Scope Item	EDAM Entity DAM Data Access: BAAOP
Description	Enable EDAM entities to access the set of Day-Ahead Market (DAM) User Interfaces within the BAAOP environment with functional equivalence to CAISO operator access Continue manually generate and post DAM result spreadsheets for EDAM entities, through secured website
Impacted Systems	BAAOP
BRS	**Version 1.0 – 08/17/26** **Version 0.6 – 6/30/2026**
Tech Spec	**N/A**
Market Simulation	**N/A**
Production	**November 19, 2026**
BPM	**N/A**

Fall 2026 – EDAM Enhancements 2026 Manage Multiple GHG areas

Project Information	Details
Scope Item	Manage Multiple GHG areas
Description	All **Core** BRQs in this section related to Multiple GHG Areas have been moved out of the EDAM BRS and into this BRS for the EDAM Enhancements 2026. Development will be required for these BRQs. • Define GHG regulation area and network branch association in SGEM • NA loss shall be calculated for each GHG area • Define CLAP for load in each GHG Regulation Area and load outside of all GHG Regulation Areas for both EDAM and WEIM BAA • GHG Bid submission and validation for GHG areas • Calculate base load for WEIM BAA CLAPs using ELAP LDF data in RTBS • Include BAA PBC slack in GHG area import allocation, using LDF for split BAAs • Calculate/Publish ELAP LDFs for WEIM BAAs at LAP level in RTBS. • Consume and publish all EDAM BAA LDFs to EDAM Entities
Impacted Systems	BAAOP
BRS	**Version 1.1 – planned October 30, 2026** **Version 1.0 – 08/17/26** **Version 0.6 – 6/30/2026**
Tech Spec	**TBD**
External Training	**GHG Overview – 09/29/2026** Readiness Handbook Overview presentation Overview Training **11/02/26**
Market Simulation	**11/11/26-12/10/26**
Production	**12/15/26**
Activation	**1/1/27**

Fall 2026 – EDAM Enhancements 2026 GHG Modeling Enhancement Phases

Two phases expand GHG market capability and refine geographic modeling, supported by coordinated development, training and market simulation.

PHASE 1 — **Expand Market Capability**

Effective January 1, 2027

- Support multiple GHG regulation areas
- Allow resources to bid into either or both areas
- Calculate a separate marginal GHG cost for each area

PHASE 2 — **Refine Geographic Modeling**

Effective June 1, 2027

- Shift GHG boundaries from balancing-area logic to state boundaries
- Improve precision for multi-state Balancing Areas

GHG IMPLEMENTATION AND READINESS TIMELINE



Fall 2026 – EDAM Enhancements 2026 Allow AS bid change in RT for non-CAISO EDAM Entities

Project Information	Details
Scope Item	Allow AS bid change in RT for non-CAISO EDAM Entities
Description	Allow EDAM resource SC to submit resource ancillary service self-provision hourly bids MW changes in RTM for non-CAISO EDAM Entities
Impacted Systems	SIBR
BRS	**Version 1.0 – 08/17/26** **Version 0.6 – 6/30/2026**
Tech Spec	**N/A**
Market Simulation	**N/A**
Production	**September 10, 2026 - COMPLETE**
BPM	**N/A**

Fall 2026 – EDAM Enhancements 2026 Congestion and Transfer billing Determinants

Project Information	Details
Scope Item	Billing Determinants
Description	Include all reportable settlement billing determinants related to the DA Congestion Offset (Charge Code 8704) and Type 1 EDAM Transfer Revenues (Charge Codes 8411 & 8470) in the EDAM Entity's MRI-S Settlement Statement.
Impacted Systems	MRI-S, Settlements
BRS	**Version 1.0 – 08/17/26**
Tech Spec	**Existing – no change**
Training	**November 4, 2026 (will be combined with MS Kickoff meeting)**
Market Sim Plan	**October 20, 2026**
Market Simulation	**November 4, 2026* this may change based upon feedback from some participants**
Production	**December 8, 2026* this may change based upon feedback from some participants**
BPM	**N/A**

Fall 2026 – EDAM Enhancements 2026 OASIS transmission interface usage report

Project Information	Details
Scope Item	Billing Determinants
Description	Entities and ISO teams request to have TSR schedules included with SR schedules (existing) in the Transmission Interface Usage report on OASIS (MIAF-2026-30, CIDI 297268)
Impacted Systems	DAM, OASIS
BRS	**Version 1.0 – 08/17/26**
Tech Spec	**10/26/2026 OASIS Interface Specification v7.7.5**
Training	**November 4, 2026 (will be combined with MS Kickoff meeting)**
Market Sim Plan	**October 20, 2026**
Market Simulation	**November 4, 2026**
Production	**December 8, 2026**
BPM	**N/A**

Independent 2026 Releases

Contractual Share for Renewable Forecasting
FERC 881 Track 2: CRR – November
FERC 881 Track 3: AAR in Market Applications*
***effective date of Order No. 881 tariff under internal review**
Transmission Exchange Agreement Renegotiation
FERC 2023 Generator Interconnection Life Cycle
DACA As A Service Implementation – October
RC Forecast & Schedules Data Reporting Automation
Storage Design & Modeling
✓Automatic Acceptance of Outage Change Requests
Power Minimum Rerates on Test Energy Cards

Contractual Share for Renewable Forecasting

Business Opportunity	
What:	Business processes and system changes are needed to support the implementation of renewable contractual share-based resources with the possibility of a preferential order. System changes to accommodate forecasting requests of contractual share. This initiative will deliver the business process and system enhancements necessary to support the implementation of renewable contractual share–based resources, including the potential for a preferential order. These changes will enable CAISO to accommodate contractual share forecasting requests and ensure the continued integrity of existing renewable forecasting for both Persistence and external forecasting service providers (FSPs). From a business perspective, this effort will: • Enable new renewable forecasting capabilities that incorporate contractual share percentages. • Maintain the accuracy and reliability of current renewable forecasting processes and systems for Persistence and external FSPs. To achieve this, new data elements will be introduced, including the storage and management of contractual percent share information for applicable resources.
Who does this opportunity/problem impact:	This will have impacts to the following areas: • VER Market Participants • Forecasting (ALFS/ALFSOA, PIWS) • Real time Operations (Siemens Market System RTD) • Resource Management (MF) • Forecast Service Providers • Outages (WebOMS) • Resource Adequacy • NRI (RIMS System)
Milestones	**Market Simulation – 8/17/26 – Oct 2026** **Production – Oct 2026**

2025-27 – FERC 881 – Managing Transmission Line Ratings

Project Information	Details/Date

High Level Project Scope	This initiative will address the California ISO's compliance with FERC Order No. 881 in establishing new transmission line rating requirements
	
	Order No. 881 establishes new transmission line rating requirements for public utility transmission providers
	• Establish and use ambient-adjusted ratings and seasonal ratings for all transmission lines unless excepted
	  ◦ Use AARs for near-term transmission service requests
	  ◦ Use seasonal rating for long-term transmission service requests
	• RTOs/ISOs must implement systems and procedures to allow transmission owners to electronically update transmission line ratings at least hourly
	• Use uniquely determined emergency ratings for contingency analysis in the operations horizon and in post-contingency simulations of constraints
	• Implement transparency reform

Milestone Type	Milestone Name	Dates	Status
Tariff	FERC Acceptance ER22-2362	Apr 20, 2023	✓
	FERC Acceptance Tariff Revisions ER22-2362	Dec 13, 2023	✓
	FERC granted extension of time from 06/15/2025 until 12/17/2026 to implement the requirements of Order Nos. 881 and 881-A1 etc. under ER22-2362	Apr 30, 2025	✓
	FERC acceptance of ER-1246	Apr 30, 2025	✓
BRS	Publish BRS – Track 1 (Updates & Added FAC-011) Publish BRS – Track 2 Publish BRS – Track 2 (Updates) Publish BRQ – Track 3	Jun 11, 2024 Nov 22, 2024 Apr 04, 2025 Jun 23, 2025	✓ ✓ ✓ ✓
Tech Spec	webLineR	Nov 24, 2024	✓
Market Simulation	Track 2 - Full - webLineR UI & API, Unstructured Tests	Apr 14, 2025 – Jun 30, 2025	✓
	Track 3 - TR four seasons update	Nov 11-17, 2025	✓
	Track 2 - webOMS - Visual UI changes	Oct 08-24, 2025	✓
	~~Track 2 - CRR Four Seasons~~	No UI Changes	
	Track 3 - BAAOP - Visual UI changes	Q4 2026	
Production	Track 1 - Real-Time Reliability Applications - Activation with Track 2 webLineR	Jul 12, 2025	✓
	Track 2 - webLineR Active; can receive seasonal & AARs	Jul 07, 2025	✓
	Track 3 - TR four season update	Nov 04, 2025	✓
	Track 2 - webOMS four seasons update	Nov 19, 2025	✓
	Track 2 - CRR four seasons update	November 2026	
	Track 3 - AAR in Market Applications & EMS	Effective date of Order No. 881 tariff under internal review.	

CAISO/RC West FERC 881 Implementation:

- Track 1 and Track 2 are complete and CAISO/RC West has been working with TOPs to integrate their ratings into RC West real time reliability applications

  - **Track 1 – Real Time Reliability Applications**
    - TOP send real time AAR/DLR through ICCP

  - **Track 2 – Look ahead 240 hours forecasted ratings**
    - weblineR is being utilized to acquire TOPs look ahead 240 hours ratings
    - Look ahead ratings are not yet going into CAISO market and RC West operation planning analysis studies

- **Track 3 – Market Application and RC Look Ahead Reliability Applications**
  - Track 3 is facing extensive delays due to competing project priorities
  - FERC granted an extension up to **December 17, 2026**
  - CAISO filed motion to seek another extension and withdrew the motion; we are working to implement this functionality as soon as possible

CAISO/RCWest FERC 881 Implementation:

- In its original extension motion of FERC Order No. 881 CAISO requested:
  - an extension of time to implement its Order No. 881 tariff provisions **up to and including December 17, 2026**, subject to the CAISO filing a notice with the Commission 7 days before the actual effective date;
  - an extension of time **up to and including October 15, 2027** for the CAISO's participating transmission owners to implement their requirements under Order No. 881 and the CAISO tariff; and
  - An extension of time **up to and including October 15, 2027** for public utility transmission providers in EDAM and Western Energy Imbalance Market (WEIM) as Order No. 881 relates to their submission of ratings for use in the day-ahead and real-time markets administered by the CAISO

CAISO RCWest Compliance Phased In Implementation

June 2025

CAISO/RCWest EMS/EMNA/HANA applications can receive real time AAR ratings through ICCP. Only reliability apps and no markets usage.

TOP can send AAR ratings

June 2025

webLineR tool is being utilized to receive 240 hrs of AAR.

TOP can send Seasonal and AAR ratings.

Monitor and evaluate ratings

2027

FERC 881 code changes for real time markets into production.

Enable usage of AAR in EIM market for WEIM entities.

Entities can choose to enable usage of AAR in real time markets

2027

FERC 881 code changes for Day ahead markets into production.

Entities that participate in both markets can choose to enable usage of AAR.

Enable Usage of AAR in DACA/LACA. Look ahead reliability applications.

2027

Complete remaining compliance work.

Usage of AAR in RAS.

Implementation of AAR in Remedial Action Schemes

- How are TOPs considering AAR implementation into Remedial Action Schemes (RAS)
- RC West suggests TOPs to utilize same ratings (AAR or Seasonal) for a Transmission equipment that is part of a TOPs RAS
- Impacts to RTCA and modeling of RAS in RTCA

Discussion on where the TO's are with respect to their compliance on FERC 881.

- CAISO/RC West would like to hear from TO's on where they are with respect to their compliance and Facility rating methodology development.

FERC 881 Next steps

- Please submit comments on the 10/26 working group discussion by end of day November 9th to using the comment template tool on the FERC Order No. 881 Initiative webpage.

- Stakeholders may submit additional comments or questions related to the implementation of FERC Order 881 to be considered in a future meeting.

2026 – Transmission Exchange Agreement-Renegotiation

Project Information	Details/Date
High Level Business Problem or Need	The ISO is committed to develop a process or system that allows Western Area Power Administration – Sierra Nevada Region ("WAPA") to resell some or all of their 400 MW ownership rights on the PACI#1 line to other SCIDs and retain the perfect hedge and scheduling priority to further contract negotiations to extend the term of the Transmission Exchange Agreement. The Transmission Exchange Agreement ("TEA") with WAPA-SNR, PG&E and ISO is scheduled to expire 9/30/2024. A term of the original agreement executed in 2004, was that the ISO would develop a system that allowed WAPA to sell their unused capacity on their line. This project provides solution to the scheduling issue which needs to be in place by June 2024 to ensure that the ISO has solved the problem and support filing an amendment and extension of the TEA at FERC.
High Level Project Scope	• WAPA needs functionality to sell their TOR to other parties on their OASIS. • If the TOR rights are sold, then WAPA will notify the CAISO to provide the purchaser the hedging and scheduling priority opportunity provided all ETCs/TORs. • The market and settlement systems need to be able to move the Contract Reference Number ("CRN") from the WAPA CRN to the purchaser SCIDs so that the settlement to the purchaser SCID reverses the costs of the transmission access charge and congestion (aka the perfect hedge) and provides a high scheduling priority in the IFM and RTM. • WAPA will not take on the obligation to settle with their purchaser. • WAPA can sell any increments of MWs up to their 400 MW ownership rights. Therefore, the solution needs to be flexible enough to allow the "existing" TORs to vary the MWs capabilities. [Note: The MW increments to be sold can be no less than 5 MW.] • WAPA's functionality allows them to schedule between Malin and Round Mountain, Malin and PG&E DLAP, and Malin and Tracy. This would be the source and sink that that functionality needs to provide. • If there are outages on the line, the curtailment should be consistent with current practice.
BPM Changes	Settlements Configuration Guides
Tariff Changes	N/A
Impacted Systems	AIM, MF, CMRI, ETCC

2026 – Transmission Exchange Agreement

Milestone Type	Milestone Name	Dates	Status
External BRS	Post External BRS	Sep 03, 2024	✓
BRS	Provide to WAPA	Jan 23, 2024	✓
Settlements Config Guides	Tech Doc 1st Draft Config File & Release Component Summary	Feb 12, 2024 Mar 04, 2024	✓ ✓
Tech Spec	Create ISO Interface Specifications – CMRI UI: The current CMRI CRN report is not being changed. WAPA will be able to see Sub CRNs mapped to its own Parent CRN	Mar 26, 2024	✓
Tariff	NA	NA	
BPMs	Draft BPM changes – Settlements & Billing PRR 1559	Mar 20, 2024	✓
Market Simulation	Market Simulation – WAPA	Aug 08, 2026 - Oct 29, 2026	
Production Activation	Transmission Exchange Agreement - Renegotiation	Dec 1, 2026	

2026 – FERC 2023 Generator Interconnection Life Cycle

Project Information	Details/Date
High Level Business Problem or Need	Effective with Cluster 15, the resource interconnection process will transition to maintain compliance with FERC Order 2023 using a new platform GRIP. This mandate will streamline the intake of generator interconnection requests, study processes, contracting and management of the queue.
High Level Project Scope	Align the following Cluster 15 resource Interconnection processes to meet compliance of FERC Order 2023 tariff provisions: - Transition from GIDAP to new Resource Interconnection Standard (RIS) procedures - Initiate Cluster Request Window for Interconnection Request (IR) submission, Customer Engagement Window, Cluster Study process including scoping and results meeting, Reassessment process, Contracting and Queue Management - Increase transparency of information to customers and public Cluster 14 and prior will initially remain in RIMS but will migrate to GRIP in 2027
Releases	Release 1 of this project opened the IR Cluster Request Window from October 1 to December 1, 2024. Since then, subsequent releases in 2025 and Q1/Q2 2026 focused on meeting several business requirements deployed in the Grid Interconnect (GIC) Study Manager (SM) modules. GIC Module Release 4.2 completed in PROD on 06/25/26. GIC Release 4.3 and SM Release 12 completed in PROD on 07/28/26. GIC Module Release 5.0 completed in PROD on 09/03/26. GIC Module GIC 5.1/GIA 2 completed in PROD on 10/01/26 **Next release SM 14 completed in PROD for 10/22/2026.** This is an Agile project, therefore further GridUnity releases will be added for Grid Interconnect (GIC) modules throughout 2026. The functionality for the remaining quarter is under discussion.

2026 – RC Forecast and Schedules Data Reporting Automation

Project Information	Details/Date
High Level Business Problem or Need	• The purpose of this project is to implement an externally-facing reporting functionality based on load forecast, generation forecast, and contingency reserve data that is submitted daily from Reliability Coordinator (RC) customers and adjacent RCs. This reporting functionality should show the entity which errors for lack of submission are present. This data is requested as a part of the North American Electric Reliability Corporation (NERC) Standard IRO-010 in order for RC West to run operational performance analysis in accordance with NERC Standards IRO-008 and TOP-002. Phase One is focused on reporting automation to show RCs and adjacent RCs which errors for lack of submission are present for load forecasting and contingency reserve data.
High Level Project Scope	Automate the reporting of RC related data submissions that may be in error to allow the customer to monitor, and thereby correct, said submissions.
BPM Changes	**None**
Tariff Changes	None
Impacted Systems	Internal Systems: ALFS, CMRI, CNS, EIDE

Milestone Type	Milestone Name	Dates	Status
BRS	BRS	Mar 02, 2022	✓
Tech Spec	NA	NA	NA
Tariff	NA	NA	NA
BPM	NA	NA	NA
Market Simulation	**Market Simulation**	NA	NA
Production	**Production Phase 1a** **Production Phase 2**	TBD TBD	

Spring 2027 Release

Resource Adequacy Modeling & Program Design - Resource Visibility
Greenhouse Gas Coordination Accounting & Reporting
Resource and Transmission Implementation

Resource Adequacy Modeling & Program Design - Resource Visibility

Business Opportunity	
What:	Enhance the ISO's resource adequacy processes by improving visibility into resources available for procurement through the ISO's backstop measures. Obtaining this information will better inform the ISO's Capacity Procurement Mechanism processes and is a first step in a multi-phase effort to enhance the effectiveness of the ISO's backstop processes.

Greenhouse Gas Coordination Accounting & Reporting

Business Opportunity	
What:	Evolve the design of a greenhouse gas (GHG) emissions accounting report available to market participants to support compliance with state, local, or corporate GHG reduction targets. The approach overlays ownership and contract data with market dispatch results to produce data that allow reporting entities to see and understand the emissions intensity of their portfolio. This data increases the transparency of GHG emissions generated in the Western Energy Imbalance Market and Extended Day Ahead Market footprint.

Resource and Transmission Implementation

Business Opportunity	
What:	The purpose of the Resource and Transmission Implementation project is to enhance the existing RIMS platform and rebuilding key functionality through a phased, module-based modernization within a new UI framework to improve maintainability, workflow management, and project visibility.
Who does this opportunity/problem impact:	Resource owners (including developers, consultants, GOPs, SCs), PTOs, WEIM participants (BAs, TOs), RC Participants (BAs, TOPs)
Milestones & Releases	Training – Yes Market Simulation – Yes. Production – • Release 1 – Western Energy Markets (WEM)- April'27 **This is an Agile project; therefore, further releases will be added for modules throughout 2027.**
Systems	**RIMS, GRIP, AIM**

Storage Design & Modeling – Outage Management

Initiative	This initiative explores enhancements to energy storage market design, modeling, and processes. One of the four topic groups is Outage Management.
Topic	(1) Outage management: Enhance ISO business practices and systems to better reflect the unique characteristics of battery storage resources and their impacts on outages and operational capabilities.

Outage Enhancements	Release Status	Release Timing
Automatic acceptance of outage change requests	Implemented in 2026	4/17/26
Power minimum rerates on test energy cards	Planned for 2026	By EOY 2026
Improvements to out-of-service checkbox functionality	Future	
Partial outages for non-generation services (Allow non-null values for non-generation outages (ancillary services)	Future	
Overlapping outage cards	No longer exploring	
Nonlinearity (foldback)	Future	Target Planning start in Q4 2026

Fall 2027 Release

EDAM Onboarding BANC
EDAM Onboarding LADWP
EDAM Onboarding PNM
EDAM Onboarding TID
Resource and Transmission Implementation

Fall 2027 – EDAM BANC, LADWP, PNM, TID

Project Info	Details/Date
Application Software Changes	System modifications as needed to accommodate any unique needs to support EDAM onboarding for: • Balancing Area of Northern California • Los Angeles Department of Water and Power • Public Service Company of New Mexico • Turlock Irrigation District
BPM Changes	EDAM BPM will be updated if needed to reflect changes identified during the onboarding and as required to reflect the unique processes of the 2027 Entities.
Market Simulation	March 15, 2027 - June 11, 2027
Parallel Operations	June 28, 2027 – September 3, 2027

Milestone Type	Milestone Name	Dates	Status
Market Simulation	Market Simulation Window	March 15, 2027 - June 11, 2027	**On Track**
Parallel Operations	Parallel Operations	June 28, 2027 – September 3, 2027	**On Track**
Tariff	N/A (filed as part of Implementation)	N/A	*N/A*
Production	Activation	September 30, 2027	**On Track**

Resource and Transmission Implementation

Business Opportunity	
What:	The purpose of the Resource and Transmission Implementation project is to enhance the existing RIMS platform and rebuilding key functionality through a phased, module-based modernization within the REACT framework to improve maintainability, workflow management, and project visibility.
Who does this opportunity/problem impact:	**External:** Resource owners (including developers, consultants, GOPs, SCs), PTOs, WEIM participants (BAs, TOs), RC Participants (BAs, TOPs)
Milestones & Releases	Training – Yes Market Simulation – Yes. Production – • Release 2 – Western Interconnection Modeling (WIM) – Fall'27 **This is an Agile project; therefore, further releases will be added for modules throughout 2027 & 2028**

Future Releases

Settlement Upgrade Project
Enhanced Curtailment Calculator (ECC) Expansion for Western Interconnect SOL
NERC Reliability Standard CIP-003-11

Settlements Transitional Measures & Overlapping Capacity

- Training 10/22/26
  - https://www.caiso.com/documents/presentation-day-ahead-market-enhancements-transitional-measures-and-overlapping-capacity-training.pdf
- FAQs https://www.caiso.com/documents/faq-transitional-measures-and-overlapping-capacity-training.pdf
- RA overlapping Settlement rules
- Only one fixed transition period. 5/1/2026-4/30/2029.
- This will be applied retrospectively beginning with Trade Date May 1, 2026.
- We will provide the applicable T+9B Trade Date closer to the production implementation date.
- RA overlap is included in the IR (CC 8071 and 8081) and RC (CC 8800 and 8810) charge codes. Any changes to these charge codes would also impact the associated allocation charge codes.
- We are planning to revise the RA overlap MW calculation when resources are mutually opted in. We are targeting the T+11M settlement for the corrections and will communicate the applicable Trade Dates closer to production implementation.

California ISO

Settlement Upgrade Project

Settlement Upgrade Project – Status

- Market Simulation 11/1/27 – 2/11/28
- Parallel Operations 3/1/28 – 4/28/28
- Production 5/1/28

Settlement Upgrade Project – Overview

- The current settlement system, implemented in 2008 as part of the Market Redesign and Technology Upgrade (MRTU) implementation, is nearing its end of life. The CAISO is upgrading existing settlement applications to approved architectural and information security standards.
- Benefits for our customers include:
  - Improved business efficiency
  - Better gathering and analysis for data and front-end improvements for customers interacting with CAISO Settlement Systems
  - Increased transparency for some calculations
  - Accommodating data processing increases resulting from new market products and an increase in market participants
  - Ability to perform complex settlement calculations

Settlement Upgrade Project – Targeted Goals

- The ISO will work closely with our market participants to ensure seamless transition from e-Terra 2.5 to 3.0 configuration output file.
- The ISO will leverage the Settlement User Group and Technical User Group for participants to ask more technical questions.
- The ISO will provide an environment with production-like data allowing customers to validate changes.
- The system will provide settlement outputs in various file formats, allowing all customers to access and use the data in day-to-day operations.
- The ISO will strive to make formulas and inputs transparent to enable market participants to monitor and/or validate settlement results.
- The ISO will provide market participants with an extended market simulation and timely support to the market participants and their vendors during the testing phase.

Settlement Upgrade Project – Targeted Goals (continued)

- From a vendor perspective:
  - ISO will provide third party vendors with support during the transition period.
  - ISO will provide an extended market simulation and/or parallel statements and invoices during the transition period so vendors can resolve defects on their systems.
  - ISO will provide open communications to resolve settlement differences through a customer forum.

Settlement Upgrade Project – Status

- The ISO continues reviewing the overall schedule for implementation.
- The implementation will take place after EDAM and DAME implementation.
- ISO will provide quarterly updates for the implementation for now and will ultimately increase the frequency of updates and the depth of information provided accordingly as we proceed
- The updates will be provided in the Release User Group and Settlement User Group
- To help ensure alignment of our communications between these two forums, this same update was provided in the next Settlement User Group call
- For comments or questions, please submit CIDI cases

NERC Reliability Standard CIP-003-11

- Registered Generator Owners who connect to CAISO's Energy Communication Network (ECN) will be expected to be able to demonstrate compliance with NERC Reliability Standard CIP-003-11 by July 1, 2029.
- That may seem like a long way off, but major changes are coming to requirements for network security for Bulk Electric System (BES) Cyber Systems categorized as low impact for generation stations.
- CIP-003-11 will require implementation of additional controls for user authentication, protecting remote access, and detecting malicious communications.
- WECC will present on this topic at the Reliability & Security Workshop in Scottsdale, Arizona, October 27 and 28.

CIP-003-11

2026 Revised California ISO Market Policy Initiatives Roadmap

June 23, 2026					
2026 Revised California ISO Market Policy Initiatives Roadmap					
		2026			
		Q1	**Q2**	**Q3**	**Q4**
Commitment Cost Bidding Flexibility		**Public dialogue: next steps**			
Congestion Revenue Rights Enhancements					
	Phase 1: Enhanced loop flow modeling	**Policy development**		**Decision**	**Implementation**
	Phase 2: Further enhancements	**Policy development**			
Demand and Distributed Energy Market Integration		**Policy development**		**Decision**	**Implementation** **Policy development**
EDAM Congestion Revenue Allocation		**Policy development**			
EDAM Enhancements		**As needed**			
Intertie Schedule Modeling Enhancements			**Policy development**		
Finance Enhancements		**Policy development**	**Decision**		
Gas Resource Management				**Implementation**	
Greenhouse Gas Coordination				**Implementation**	
Price Formation Enhancements					
	Scarcity pricing & market power mitigation	**Policy development**			**Decision**
	Fast start pricing	**Postponed**			
Resource Adequacy Modeling and Program Design					
	Track 1: Modeling and default rules		**Implementation**		
	Track 2: Outage substitution and availability and incentive mechanisms	**Policy development**			**Decision**
	Track 3a: Resource visibility				**Implementation**
	Track 3b: Backstop reform and long-term EDAM RSE solutions				**Policy development**
Storage Design and Modeling					
	Topic group 1: Outage management enhancements	**Policy development**		**Implementation**	
	Topic group 2: Uplift & default energy bids	**Policy development**			
	Topic group 3: State-of-charge management	**Policy development**			
	Topic group 4: Mixed-fuel & distribution-level resources	**Policy development**			
Variable Operations and Maintenance Cost: Triennial Review			**Policy development**		**Decision** **Implementation**
WEIM Resource Sufficiency Evaluation Enhancements		**Postponed**			

Policy Initiative Timeline

Updated: 9/10/2026

Pre-proposal development | Proposal development | Decision | Implementation | Comments Due | Meeting

2026

Classification	Initiative	Q1												Q2												Q3												Q4											
		January				February				March				April				May				June				July				August				September				October				November				December			
		Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4
Briefing	Market Policy Initiative Catalog & Roadmap Process - 2026	Kick-off 2026 Roadmap				Catalog Submissions				Prioritization Process - Survey Survey Submissions				Prioritization Process - Survey Results				Policy Initiatives Catalog Published				2026 Market Policy Catalog and Revised 2026 Market Policy Roadmap Posted																Draft 2027-2029 Market Policy Roadmap								Final 2027-2029 Market Policy Roadmap			
	Infrastructure Policy Initiative Catalog & Roadmap Process - 2026	Kick-off 2026 Roadmap				Catalog Submissions								Prioritization Process				Infrastructure Policy Catalog Published																				Draft 2027-2029 Infrastructure Policy Roadmap								Final 2027-2029 Infrastructure Policy Roadmap			
WEM GB Primary Authority	2026 Variable operations and maintenance cost review																	Issue Paper				Revised Straw Proposal				Final Proposal and Draft Tariff Language								Decision															
Board	Congestion revenue rights enhancements	Issue Paper												Straw Proposal								Draft Final Proposal		Final Proposal	Decision	Continued Policy Development																							
WEM GB Primary Authority	Demand and Distributed Energy Market Integration	Straw Proposal and Issue Paper												Revised Straw Proposal								Draft Final Proposal				Continued Policy Development																							
	Extended Day-Ahead Market (EDAM) Congestion Revenue Allocation Phase 2	Working Groups																																														
	Intertie Schedule Modeling Enhancements	Working Groups																																														
Board	Interconnection Service Capacity and Deliverability Retention for Non-Operating Generating Facilities													Straw Proposal				Draft Final Proposal				Final Proposal		Decision																							
Board	Interconnection Process Enhancements 5.0	Final Proposal				Revised Final Proposal								Decision								Draft Tariff Language																											
	Large Loads					Technical Requirements development																				Straw Proposal								Draft Final Proposal, Draft Tariff Language				Decision											
WEM GB Primary Authority	Price Formation Enhancements Phase 2																																														
	Topic 1: Scarcity Pricing																									Revised Straw Proposal								Draft Final Proposal															
	Topic 2: BAA-level MPM																									Revised Straw Proposal								Draft Final Proposal															
	Topic 3: Fast-start Pricing																																														
	Storage Design and Modeling																																														
	Topic 1: Outage Management	Revised Straw Proposal								Second Revised Straw Proposal												Implementation																											
	Topic 2: Uplift, and Default Energy Bid (DEB)	Working Groups																								Straw Proposal				Revised Straw Proposal				Draft Final Proposal															
	Topic 3: State-of-Charge (SOC) Management	Working Groups																								Straw Proposal				Revised Straw Proposal				Draft Final Proposal															
	Topic 4: Mixed-fuel & Distribution-Level Resources	Working Groups								Issue Paper and Straw Proposal				Continued Proposal Development																																			
	Resource Adequacy Modeling & Program Design																																														
Board	Track 1: Modeling, Defaults, and Accreditation	Draft Tariff Language												FERC Approval																																		
	Track 2: Outage & Substitution and Availability and Incentive Mechanisms	Straw Proposal																				Revised Straw Proposal				Second Revised Straw Proposal								Draft Final Proposal															
Board	Track 3a: Backstop reform and long-term EDAM RSE solutions	Draft Tariff Language												FERC Approval																																		
	Track 3b: Backstop Procurement Reform	Proposal Development tentatively set for Q4																																													

Stay Informed

ISO Training Schedule

Training Course	Date and time
GHG Phase 1 Pre-Market Simulation Training	**November 2 from 1:30 – 3:30pm PST**

Use our Pre-Training Release Survey to submit topics that you would like to see covered in the upcoming training.

Are you looking for more training?

The ISO Training Center has computer based training available for lots of topics.
Check out the Learning Center: https://www.caiso.com/stakeholder/training



Ways to participate in releases

- **Next Release User Group Forum is November 10, 2026**

- Visit the Release Planning page
  - http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx

- Attend meetings
  - Release Users Group (RUG) bi-weekly meetings
    - Initiative status updates
    - System change updates on releases
    - Technical User Group updates
  - Market Simulation calls
    - Visit the ISO calendar at www.caiso.com for meeting dates and times and add events to your calendar
    - Typically held on Mondays and Thursdays
  - Market Performance and Planning Forum
    - Quarterly review of market performance topics
    - High level discussion of release planning, implementation and new market enhancements

Contact

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