



California ISO Release User Group

September 29, 2026

10:00 a.m.–11:00 a.m. (Pacific Time)

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<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
webLineR new APIs Update	Nalini Chari

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	queryHistoricalActiveSeasonalRatings	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:
 - Tentative production deployment date for Track 3 is 10/13/2026. Once we have our internal approvals, communication will be sent out with the final date.
 - Tentative Map stage deployment date is 10/05/2026. Communication will be sent out with the final date.

Release Updates

Release Plan Summary

Fall 2026 Release

EDAM Onboarding PGE
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
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

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

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 Onboarding PGE
EDAM Enhancements 2026

Fall 2026 – EDAM PGE

Project Info	Details/Date
Application Software Changes	System modifications as needed to accommodate any unique Portland General Electric needs to support their EDAM onboarding.
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 Portland General Electric.
Market Simulation	March 2, 2026 through May 29, 2026
Parallel Operations	June 1, 2026 through September 15, 2026

Milestone Type	Milestone Name	Dates	Status
Market Simulation	Market Simulation Window	March 2, 2026 through May 29, 2026	Complete
Parallel Operations	Parallel Operations	June 1, 2026 through September 15, 2026	Complete
Tariff	N/A (filed as part of Implementation)	N/A	N/A
Production	Activation	October 1, 2026	On Track

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 – 10/08/26 GHG <u>Version 1.0</u> – 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	10/8/2026
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	9/30/2026
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	9/30/2026
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	9/29/2026
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	10/30/2026
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.	TBD	October 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	10/22/2026
SIBR RSE Capacity Report future dates	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	10/22/2026
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	TBD	October 30, 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	2026
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	2026
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	2026
LACA/DACA Tools	• Advanced Voltage Control • AVR regulation for post- contingency • Offline RAS • DACA run abort • Activate RAS in OMS	TBD	2026

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 27 th , 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	October 8, 2026
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.
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
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).
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
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
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	October 30, 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 10/8/2026 Version 1.0 – 08/17/26 Version 0.6 – 6/30/2026
Tech Spec	TBD
External Training	GHG Overview – 09/29/2026 Late-October (TBD)
Market Simulation	November 2026
Production	December 2026
BPM	TBD

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	October 2026
Market Simulation	Mid – October 2026
Production	October 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 – 9/24/26 Production – 10/8/26

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)	Jun 11, 2024	✓
	Publish BRS – Track 2	Nov 22, 2024	✓
	Publish BRS – Track 2 (Updates)	Apr 04, 2025	✓
	Publish BRQ – Track 3	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/RCWEST FERC 881 Implementation:

- Track 1 and Track 2 are in flight to be completed by November 2026.
 - **Track 1 – Real Time Reliability Applications**
 - ✓ Target Capability ready by end of December 2024.
 - ✓ Final changes went active with webLineR production
 - **Track 2 – Operational/EMS Model Data and Applications**
 - ✓ webLineR product utilized for receiving Look ahead ratings.
 - ✓ webLineR went into Production July 2025
 - ✓ TR updated to accept and display four-season submissions Nov 2025
 - ✓ webOMS updated to display four-seasons Nov 2025
 - **Track 3 – Market Application and Look Ahead Applications**
 - Proposing realignment of phased in implementation.
 - Effective date of Order No. 881 tariff under internal review.

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	Feb 12, 2024	✓
	1st Draft Config File & Release Component Summary	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	Nov 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, for additional functionality to support the Reassessment and Facility Study process. Next release GIC 5.1/GIA 2 planned for 10/01/2026 will provide additional functionality to support the IR (interconnection request) intake process, changes to the Study agreement, C16 WADT (wholesale distribution access tariff) and other previous defects. 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 – DACA As A Service (DAAS)

Project Information	Details/Date
High Level Business Problem or Need	With the implementation of Extended Day Ahead Market (EDAM), new EDAM entities are seeking a tool to provide them with a capability to perform their own Day Ahead Contingency Analysis (DACA) executions. The new application called DAAS (DACA as a Service) provides a subscription-based solution enabling EDAM entities to perform reliability studies for their own balancing areas.
High Level Project Scope	- Implement the new DAAS application and supporting technology to provide external access to DAAS - Implement processes and functions to support billing/invoicing and cash clearing for annual DAAS subscription fees
BPM Changes	EDAM BPM Settlements and Billing BPM Settlement Config Guide – CC 5811
Tariff Changes	Yes
Impacted Systems	DAAS, MF, Settlements, MRIS

Milestone Type	Milestone Name	Dates	Status
DAAS User Guide	Provide Subscribers DAAS Application User Guide	June 8, 2026	✓
Draft Settlement Config Guide	Post Draft Tech doc – Charge Code 5811	June 16, 2026	✓
Tech Spec	NA	NA	
Tariff	Filing: Amendment to Support Implementation of DAME/EDAM Initiative ER26-1294 FERC Approval ER26-1294	Feb 6, 2026 Apr 8, 2026	✓ ✓
BPMs	EDAM BPM Settlements and Billing BPM	May 1, 2026 August 1, 2026	✓ ✓
Market Simulation	Market Simulation – PAC and PGE DAAS Application Settlement – MRIS Connectivity	June 8, 2026 July 15, 2026	✓ ✓
Production Activation	DAAS Application Go live for 10/1/26 Operating Day – pending payment receipt Settlement effective date	Sep 21, 2026 Oct 1, 2026	✓

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



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

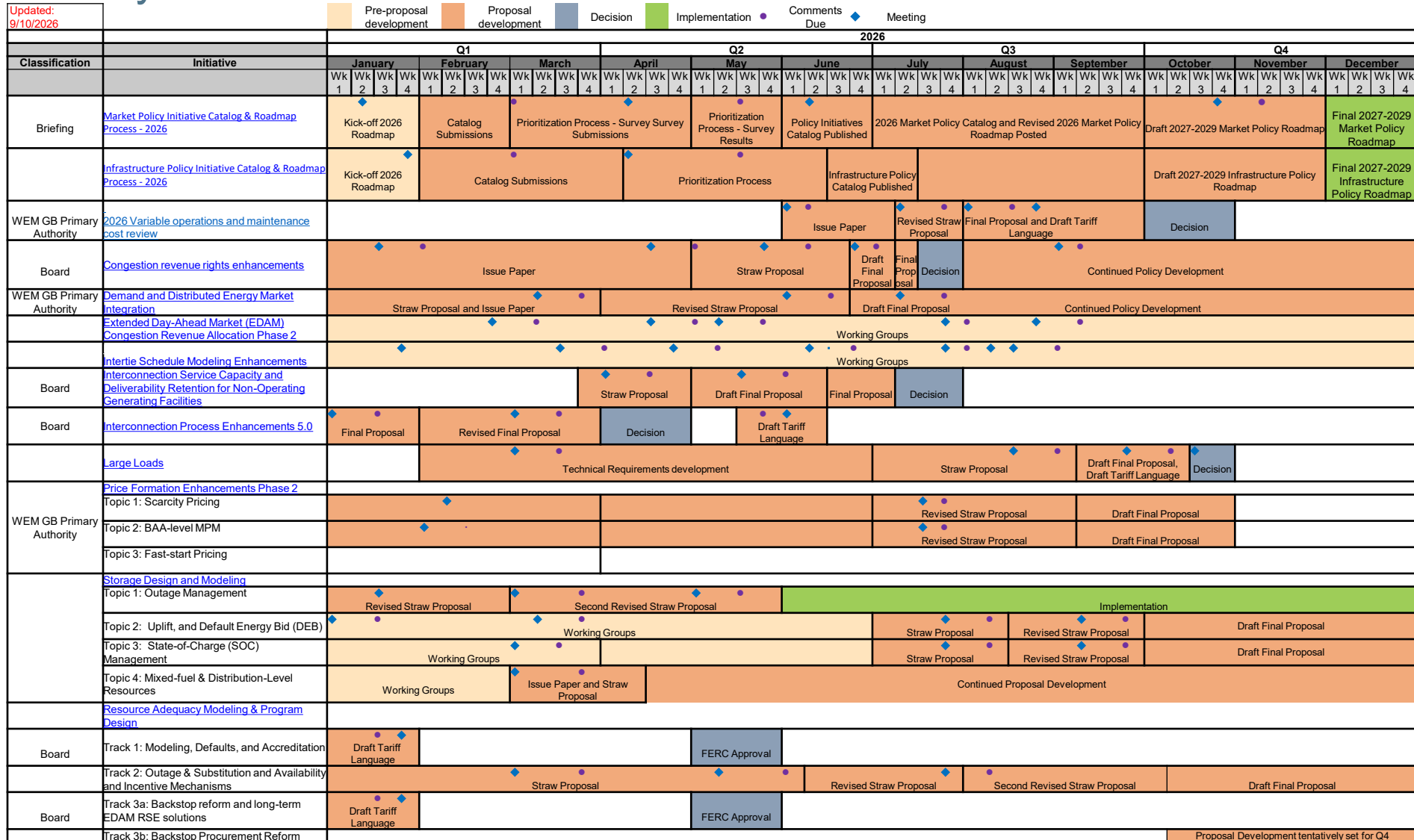
NERC Reliability Standard CIP-003-11

- 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.

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



Stay Informed

ISO Training Schedule

Training Course	Date and time
DAME Transitional Measures and Overlapping Capacity	10/1 from 1:00pm-3:00pm

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 October 13, 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

- tvo@caiso.com