Scheduling Infrastructure & Business Rules (SIBR) Overview for DAME & EDAM – Part 2

March 10, 2026

Today's Trainer:
Heidi Carder, Lead Customer Education Trainer

Rev. 3/10/26

What you will learn

By completing this training, you will gain essential skills and knowledge to prepare for EDAM participation. You will be able to:

- Describe the displays and their functions in the SIBR User Interface.
- Explain the process for submitting an energy bid in SIBR.
- Review the results of an energy bid.

This is step 1 in a 3-part SIBR training series

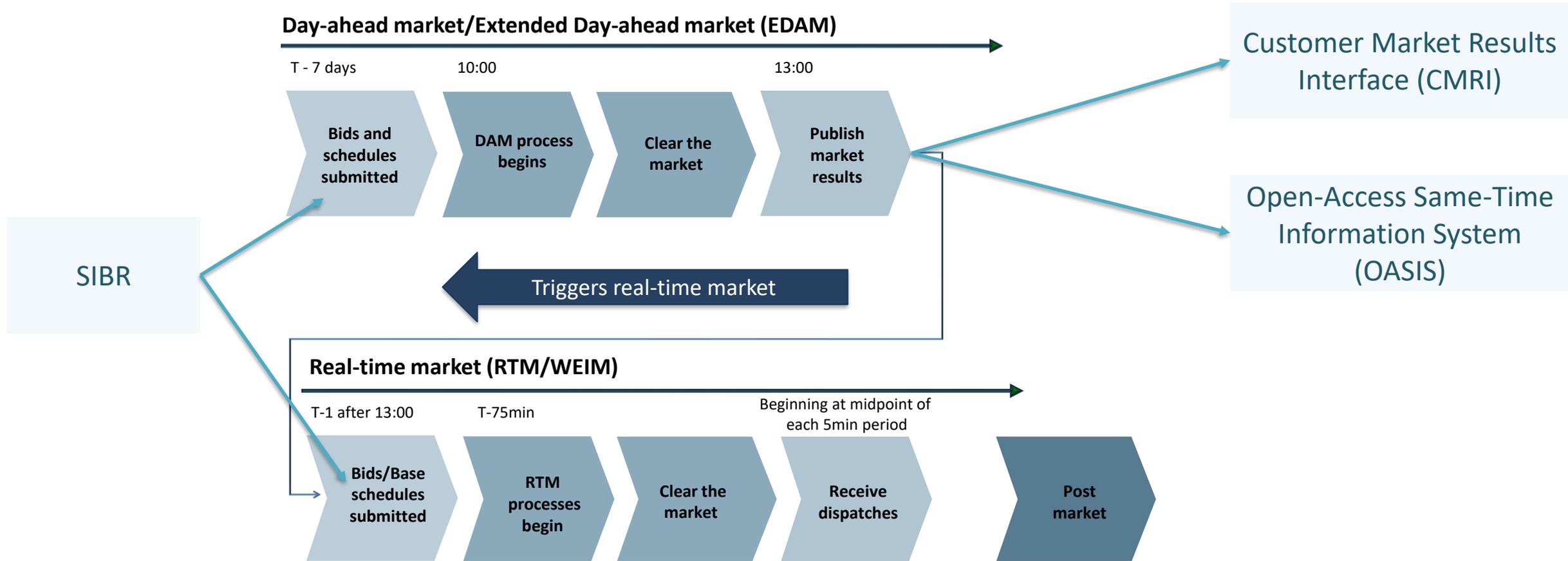| **1**	**2**	**3**
Introduction to SIBR – Basic Concepts	SIBR Fundamentals – General Bidding	Advance SIBR Bidding Concepts for EDAM – Transfer System Resources

Scheduling Infrastructure and Business Rules (SIBR)

User interface (UI) provided by the California ISO that:

- Accepts bids and trades for energy and energy-related commodities from Scheduling Coordinators that are certified to interact with CAISO

- Ensures that those bids and trades are valid and modifies bids for correctness when necessary

- Enters those bids and trades into a database for processing by other components of CAISO's management systems

- Provides required feedback in the form of messages displayed to SCs concerning bids and trades that have been submitted

Market Timeline

Day-ahead market/Extended Day-ahead market (EDAM)

T - 7 days   10:00   13:00

Bids and schedules submitted → DAM process begins → Clear the market → Publish market results

← Triggers real-time market

Real-time market (RTM/WEIM)

T-1 after 13:00   T-75min   Beginning at midpoint of each 5min period

Bids/Base schedules submitted → RTM processes begin → Clear the market → Receive dispatches → Post market

SIBR

Customer Market Results Interface (CMRI)

Open-Access Same-Time Information System (OASIS)

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SIBR BASICS

Scheduling Infrastructure and Business Rules (SIBR)

Scheduling Infrastructure and Business Rules (SIBR)
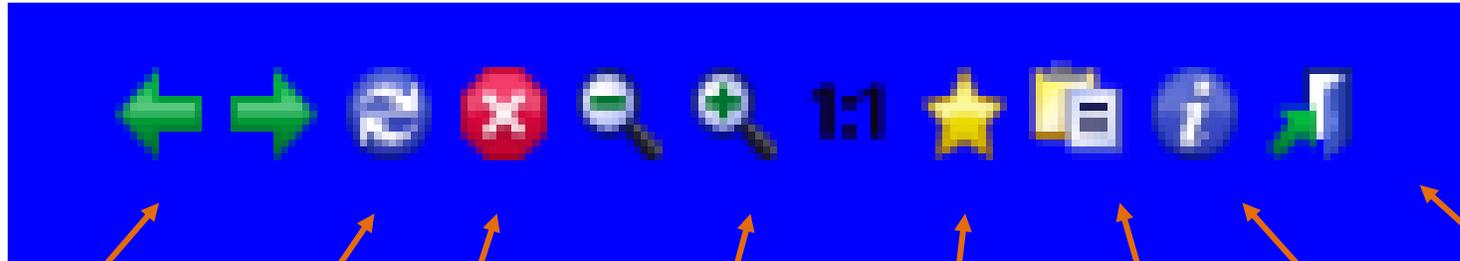
Application header display

Market selection drop down

Calendar date selection

Available SCID based on certificate logged into

Click apply

Navigation Icons

Previous or Next

Refresh

Stop

Zoom In/Out Reset Zoom

Favorites

Portfolio Management

Application Identification

Exit

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Create Bid

Remove Bids

Upload Bids

Filter

Bid summary

1 - 24 of 33

Add to Portfolio

Submit Selected Bid

Copy Bids

Restore Default Sort

Adjust Columns

Page Navigator

Go To

Pop Out Application

Status Icons provide a visual indicator of your bid status

Section 2.2.2 of the SIBR User Guide provides more status icons and their definitions

Status Icons provide a visual indicator of your bid status

Market accepted bid – external bid status of 'MI' or 'V' (Master File Inserted / Valid)

Market accepted bid – external bid status of 'M' (Modified)

Market accepted bid – external bid status of 'CM' or 'CV' (Conditionally Modified / Valid)

Invalid bid – external bid status of 'I'

Rejected bid – external bid status of 'RJ'

Edited bid – external bid status of 'CR'

Submitted or Recent Submitted bid – external bid status of 'S' or 'RS'

Scheduling Infrastructure and Business Rules (SIBR)

Bid Details Displays provide the opportunity to view data and make edits

Bid Details Displays provide the opportunity to view data and make edits

Display used for entering and viewing the Energy components.

Contents may include:

- Hour
- Price Curve(s)
- Distribution pair
- Pumping

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Bid Details Displays provide the opportunity to view data and make edits
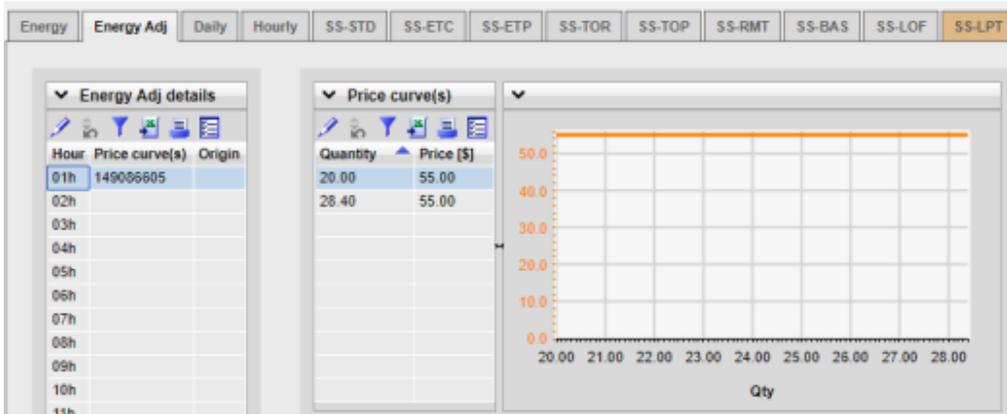
Display used for entering and viewing Energy Adj components.

Contents may include:

- Hour

- Price Curve(s)

Resource must have a Threshold curve in order to submit an Energy Adjusted Default Energy Bid.

Bid Details Displays provide the opportunity to view data and make edits
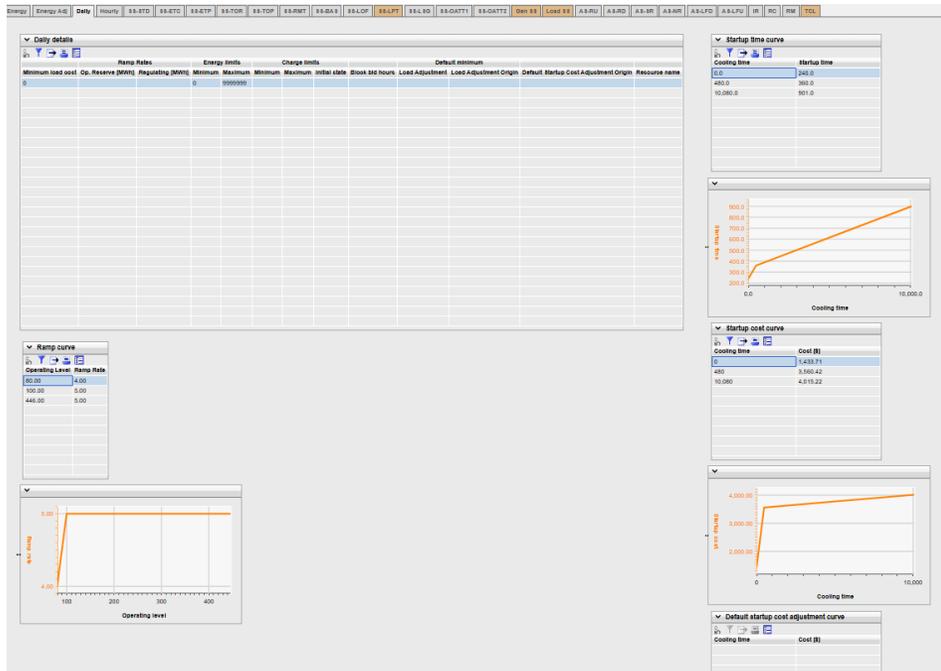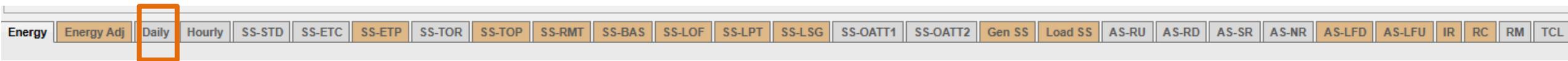
Display used for entering and viewing daily components.

Contents may include:

- Startup information (cost curve, time curve) (DAM and RTM)
- Minimum Load information. (DAM and RTM)
- Minimum and Maximum Energy Limit information. (Gen only)
- Minimum and Maximum Charge Limit information. (NGR only)
- Initial State of Charge Limit Information (Initial State) (NGR only)
- Default Load Adjustment (Gen)
- Default Startup Adjustment (Gen)
- State Transitions (MSG only)

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Bid Details Displays provide the opportunity to view data and make edits

Display used for entering and viewing entering and viewing Hourly (Miscellaneous) components.
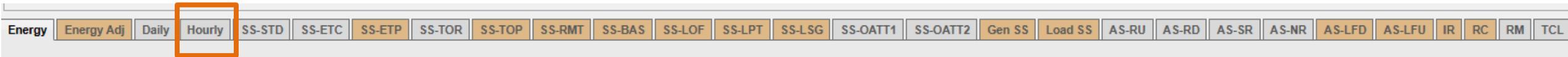
Contents may include:

- Hour
- Open Tie Indicator
- Generation Capacity Limit
- SCID/Primary Tie/PSE ID
- Registered Resource
- Counter Resource
- GHG Data

Bid Details Displays provide the opportunity to view data and make edits

Display used for entering and viewing Self-Schedule Standard components.

Contents may include:

- Hour
- Self Schedule Quantity (MW)
- Supporting Resource (Export only)
- Block bid hours (DAM only)
- Pumping Self Schedule (Pump Storage Hydro only)

Bid Details Displays provide the opportunity to view data and make edits
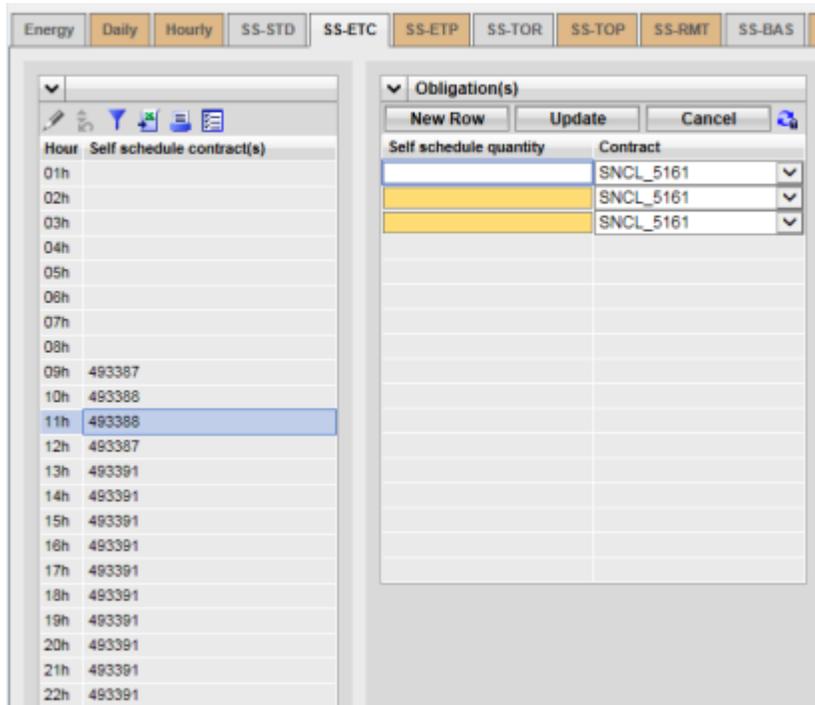
Displays used for entering and viewing self schedules for resources that have contract rights for scheduling priority:

- Existing Transmission Contract (ETC) ; ETP for Pumping Contracts
- Transmission Ownership Rights (TOR); TOP for Pumping Contracts
- Regulatory Must Take (RMT)

Contents may include:

- Hour
- Self schedule contract(s)
- Self schedule quantity
- Contract Reference Number (CRN) associated to resource

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Bid Details Displays provide the opportunity to view data and make edits

Additional Self Schedule Details Displays

- SS-BAS: Not used.

- SS-LOF: Not used.

- SS-LPT (Export only): Display used for entering and viewing SS for Export resources that name a supporting resource to provide non-RA energy to the export

- SS-LSG (Load Serving Generator only): Display used for entering and viewing SS for resources that serves load behind the meter qualifying for net Energy settlement

- SS-OATT1

- SS-OATT2

- Gen SS and Load SS (Non-generating Resources, NGR, only)

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Bid Details Displays provide the opportunity to view data and make edits

Displays used for entering and viewing Ancillary Services, those resources that have certified capacity:

- Regulation Up & Regulation Down (RU/RD)
- Spin & Non-Spin (SR/NR)
- Load Following Down & Load Following Up (LFD/LFU)

Contents may include:

- Hour
- Capacity MW & Price
- Opportunity cost [$MW]
- Self-provision MW quantity for its own AS obligation
- Contingency Indicator

Bid Details Displays provide the opportunity to view data and make edits

Displays used for entering and viewing new DAME resources that have certified capacity:

- Imbalance Reserve Up/Down (IRU/IRD)
- Reliability Capacity Up/Down (RCU/RCD)

Contents may include:

- Hour
- Resource Name
- Capacity MW – Imbalance Reserve Capacity
- Capacity price
- State – Configuration for MSG resource

Bid Details Displays provide the opportunity to view data and make edits

| Energy | Energy Adj | Daily | Hourly | SS-STD | SS-ETC | SS-ETP | SS-TOR | SS-TOP | SS-RMT | SS-BAS | SS-LOF | SS-LPT | SS-LSG | SS-OATT1 | SS-OATT2 | Gen SS | Load SS | AS-RU | AS-RD | AS-SR | AS-NR | AS-LFD | AS-LFU | IR | RC | RM | TCL |

Display used for entering and viewing Regulation Mileage Up or Down for resources that have a Regulation bid component.

Contents may include:

- Hour

- Price [$/MW]

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Bid Details Displays provide the opportunity to view data and make edits

Energy	Energy Adj	Daily	Hourly	SS-STD	SS-ETC	SS-ETP	SS-TOR	SS-TOP	SS-RMT	SS-BAS	SS-LOF	SS-LPT	SS-LSG	SS-OATT1	SS-OATT2	Gen SS	Load SS	AS-RU	AS-RD	AS-SR	AS-NR	AS-LFD	AS-LFU	IR	RC	RM	TCL
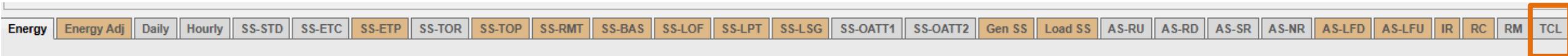
Hour	Resource Name	Capacity limit [MW]
01h	_I_4_00	1,400.00
02h	_I_4_00	1,400.00
03h	_I_4_00	1,400.00
04h	_I_4_00	1,400.00
05h	_I_4_00	1,400.00
06h	_I_4_00	1,400.00
07h	_I_4_00	1,400.00
08h	_I_4_00	1,400.00
09h	_I_4_00	1,400.00
10h	_I_4_00	1,400.00
11h	_I_4_00	1,400.00
12h	_I_4_00	1,400.00
13h	_I_4_00	1,400.00

Display used for entering and viewing Transmission Capacity Limit component.

Contents may include:

- Hour
- Resource Name
- Capacity Limit MW

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BID CREATION & SUBMISSION PROCESSES

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SIBR accepts two kinds of bids

Day-Ahead Market (DAM)

- Submitted for a resource for a 24-hour market period
- May be submitted up to 7 days in the future
- Must be submitted prior to market close for the target day

Real-Time Market (RTM)

- Submitted for one-hour periods for one target day
- System display allows for up to 24 hours to be entered on a single screen

There are 3 data categories that can be entered for both DAM and RTM

Daily Components

Parameters associated with the resource for the trade day, not with an individual market or hourly intervals of the bid

Product Components

Parameters s that may vary from one hour to the next through the market period

Hourly Components

Parameters that may vary from one hour to the next through the market period

- Navigate to the Bid Display
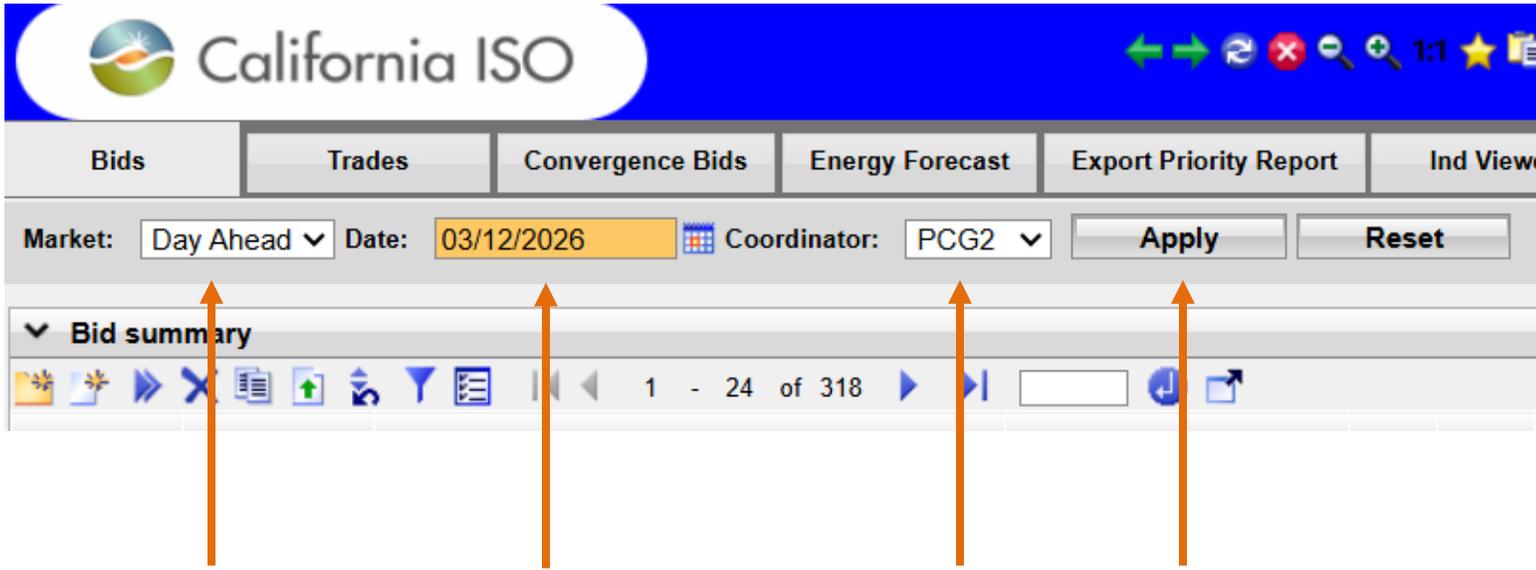
- Select the market you want to bid into

- Select the date

- Select the Coordinator ID

- Click Apply

- Click on the Create Bid icon

- Enter the trade date for the applicable bid
- Change Coordinator ID if applicable
- Select Resource name
- Select product type
- On the Create bid tab click Create

- Click the filter icon
- Select **Created** from the Status drop down

- Once the bid is created, you will see data in the Energy Details Display since this is an Energy bid

- In the Energy Details Display, you can enter a price curve for the resource

- Start by clicking on the pencil in the Energy details pane

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- You can create the bid curve for individual hours by clicking on the Hour interval, the clicking the pencil on the Bid curves pane

- Click the **New row** button to create a new bid segment – note you must create two

- Enter the quantity and price – note the price in the last two segment must be the same

- Click **Update**

- After you click update in the Price curves pane, click Update in the Energy details pane
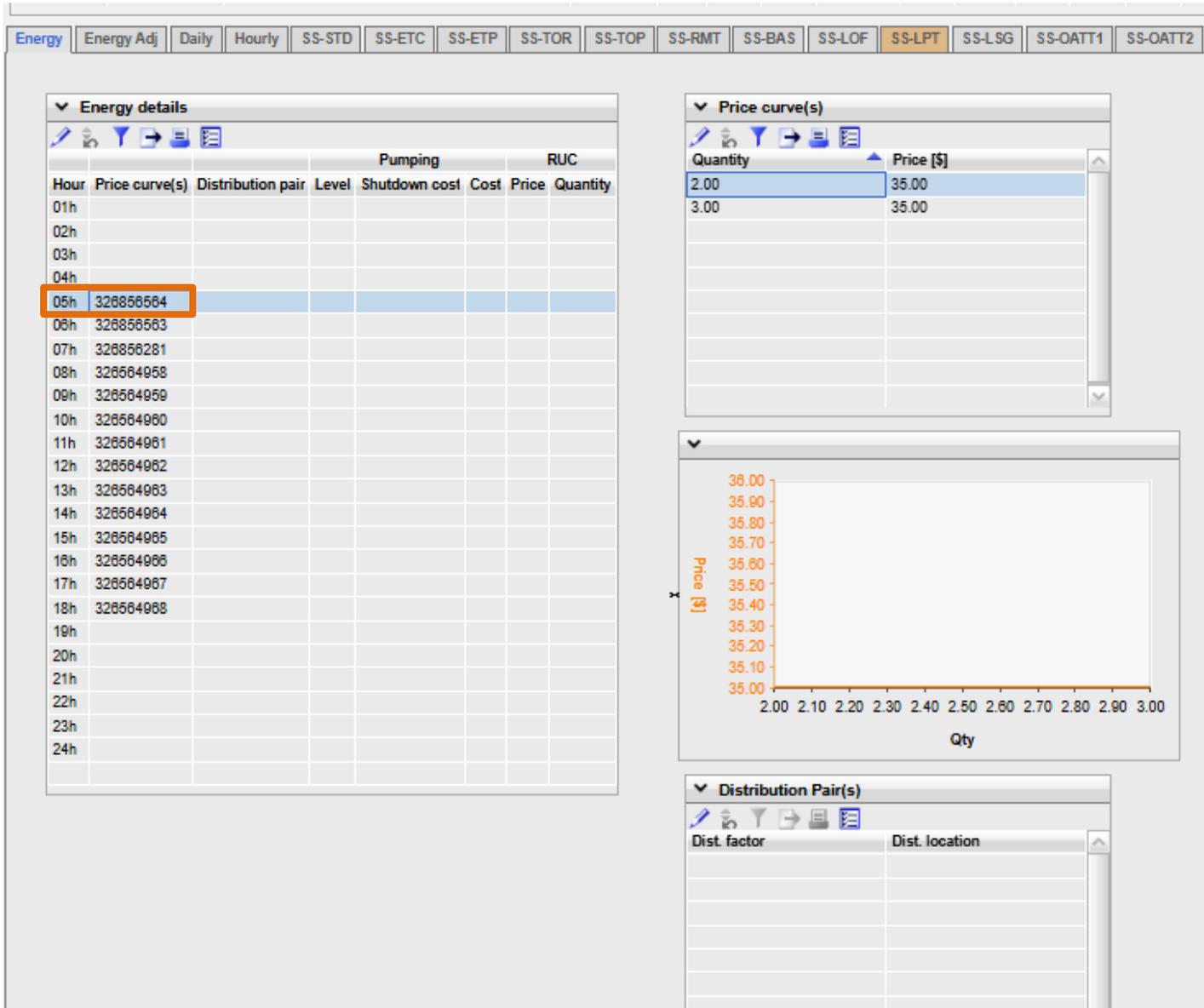
- The Energy Details Display will show a new price curve number for the hour you updated

- Your bid has now been created and is ready for submission

- Select the Submit Selected Bid icon or right click on the bid and select Submit Bid from the drop down

- Once the submission has processed, SIBR produces an icon that provides a quick view on bid status

- Click on the Status icon for Bid Messages

- This example provides a Conditionally Modified accepted bid

- This example provides an invalid bid

ENVIRONMENTS & SUPPORT

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Environments

CAISO uses multiple application environments so teams can develop, test, and validate changes without disrupting real-time grid operations.

Color coded bands at the top of ISO UIs let you know the which environment you are working in:

Each environment has a distinct purpose

PROD	STAGE	MAPSTAGE

PROD

- Live environment running the actual CAISO grid and markets

- Handles all real submissions, settlements, and telemetry

- Updated only after thorough testing to protect reliability

STAGE

- Full-scale test environment mirroring Production

- Used to validate releases, rule changes, and integrations

- Ensures participant systems work with upcoming updates

MAPSTAGE

- Environment dedicated to Market Participant testing

- Supports connectivity checks and early API/interface validation

- Less strict than Stage but designed to catch issues early

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Submitting Questions in Customer Inquiry, Dispute and Information (CIDI) system

- CIDI is the ISO's central platform for submitting questions, issues, and requests

- Ticket submissions should clearly state the environment (e.g., Prod, Market Simulation)

- Include screenshots, timestamps, and steps taken

- You must be a Scheduling Coordinator to enter information into CIDI

  - If you are not the SC contact your SC to request to submit on your behalf

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WHAT'S NEXT?

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This is step 1 in a 3-part SIBR training series

1

Introduction to SIBR – Basic Concepts ✓

2

SIBR Fundamentals – General Bidding ✓

3

Advance SIBR Bidding Concepts for EDAM – Transfer System Resources

SIBR Training Resources

SIBR Training Courses

January 29: EDAM Scheduling Infrastructure Business Rules (SIBR) Training presentation & video
- This training covered the basics of SIBR, including access, process flows and documentation
- Presentation & video available on the ISO Training Center

March 10: **SIBR Fundamentals (Part 2)**
- This training will explore the core interface, walk through submitting and validating Energy and AS bids, and review the resulting outputs.

March 19: **SIBR Advanced Bid Submission & Validation (Part 3)**
- This training provides walk through complex bid-submission scenarios—including TSR Types 1–4, transient TSRs, contract reference numbers, and transfer capacity limits—and show how to resolve common errors step-by-step
- Target Audience: SIBR users in Day-Ahead
- Registration Link: https://caiso.regfox.com/training-scheduling-infrastructure-and-business-rules-sibr-advanced-bid-submission--validation-

SIBR Training Materials

Visit the Western Energy Markets page on the ISO Training Center:
- EDAM Scheduling Infrastructure Business Rules (SIBR) Training presentation & video
- Transient Transfer System Resource Bid Submission in Scheduling Infrastructure Business Rules (SIBR)

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Process for Submitting Bids / Schedules in SIBR

To find basic information on bids and base schedules, view the following resources:

- Computer-based training courses:
    - [Economic Bids and Self Schedules](#)
    - [EDAM Bidding Basic Concepts](#)

- Instructor led training presentations and recordings:
    - [EDAM Scheduling Infrastructure Business Rules (SIBR) Training presentation](#)
    - [EDAM Scheduling Infrastructure Business Rules (SIBR) Training video](#)
    - [Transient Transfer System Resource Bid Submission in Scheduling Infrastructure Business Rules (SIBR) Presentation](#)
    - [EDAM Bidding Intermediate – presentation](#)
    - [EDAM Scheduling Coordinator Training Day 2, September 11th, 2025 – recording](#)

- CAISO public [SIBR Bidding](#) webpage
    - [SIBR User Guide](#)

Find helpful training resources on the ISO Training Center

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

Tell us how we're doing

Takes 3-5 minutes to complete

Helps us improve future training

Link: https://www.surveymonkey.com/r/caisocoursesurvey

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Thank you for your participation!

For clarification on anything presented in this training, send an email to: CustomerReadiness@caiso.com

For other questions or stakeholder specific questions or concerns use one of these methods:
- Submit a CIDI ticket
- Contact your Scheduling Coordinator
- Use the "Contact us" page on caiso.com to submit questions

REFERENCE MATERIALS

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SIBR documentation is posted to caiso.com

- Existing business rules are posted, along with upcoming changes based on EDAM implementation.

- Release notes capture changes made to business rules.

- Additional technical information is posted to the ISO's Developer Portal (account required).

Systems and applications / Portals and applications / Scheduling Infrastructure Business Rules (SIBR) - Bidding

Scheduling Infrastructure Business Rules (SIBR) - Bidding

The Scheduling Infrastructure Business Rules (SIBR) – Bidding application provides market participants with the ability to submit bids for energy and energy-related commodities and services.

Access the application through the MPP* ⧉

*Certificate required

Technical documentation, including technical specifications and artifacts (WSDL, XSD), are available on the Developer Portal (developer account required).

View all previous release notes and business rules for SIBR.

Production

- SIBR Scheduling Coordinator User Guide PDF 08/23/2023, 9:44 AM
- SIBR Business Rules for Bidding v11.7.4 XLS 08/02/2023, 11:51 AM
- SIBR Reports Self Schedule Contracts Report PDF 07/16/2009, 12:59 PM

Upcoming

- SIBR Business Rules for DAME and EDAM XLS 05/28/2025, 10:28 AM
- SIBR Release Notes for Extended Day-Ahead Market and Enhancements (EDAM/DAME) PDF 05/28/2025, 10:28 AM
- SIBR Release Notes Rules for Price Formation Enhancement (PFE) PDF 06/28/2024, 10:22 AM
- SIBR Business Rules for Bidding v 11.8.3 XLS 06/28/2024, 10:22 AM
  Scheduling Infrastructure Business Rules for Price Formation Enhancement
- SIBR Scheduling Coordinator User Guide for DAME PDF 03/05/2024, 11:06 AM
- SIBR Business Rules for Bidding v11.8 XLS 12/01/2023, 10:09 AM

Developer Portal

https://developer.caiso.com/

Documentation Types:
- Technical Specs
- Services
- Resources:
    - User Guides
    - Release Notes
    - FAQs & Forums

Developer Portal – SIBR Page

Developer Portal – SIBR Page

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Scheduling Infrastructure Business Rules (SIBR)

SIBR Business Rules for DAME and EDAM Update v12.3.4

Business Rules	Bidding rules for bid submission
Figures	Business Rules
Terms	Definitions of the business rules

These resources provide more information about bidding and validation

Title	Link
Business Practice Manual (BPM) for Market Instruments	https://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Market%20Instruments
Business Practice Manual (BPM) for Market Operations section 2.5.2 Bids	https://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Market%20Operations
Knowledge Article: Reasons Day-Ahead Market Results May Not Seem Economic	https://caiso.my.site.com/custsvccomm/s/article/Reasons-Day-Ahead-Market-Results-May-Not-Seem-Economic
Resource Performance Expectations of Dispatch and Operating Instructions (CBT)	https://www.caiso.com/content/cbt/resource-performance-expectations-dispatch-operating-instructions/story.html
SIBR Business Rules for Bidding webpage	https://www.caiso.com/systems-applications/portals-applications/scheduling-infrastructure-business-rules-sibr-bidding
Tariff: Section 30 – Bid and Self-Schedule Submission for all CAISO Markets	https://www.caiso.com/legal-regulatory/tariff

Reference Material (cont.)

Title	Link
Market Participant Portal	https://portal.caiso.com/
Developer Portal	https://developer.caiso.com/
SIBR – Scheduling Coordinator Users Guide for DAME	https://www.caiso.com/documents/sibr_scuserguide_80.pdf
SIBR Business Rules for DAME and EDAM Update v12.3.4	https://www.caiso.com/documents/sibr-business-rules-for-dame-and-edam-update.xlsx

To find basic training information on bids and base schedules, and gaining access to applications view the following resources:

- Computer-based training courses:
  - Economic Bids and Self Schedules
  - EDAM Bidding Basic Concepts
  - How to Gain Access to the ISO Applications

- Instructor led training presentations and recordings:
  - EDAM Bidding Intermediate – presentation
  - EDAM Scheduling Coordinator Training Day 2, September 11th, 2025 – recording