

4/21/2026

#	Readiness Category	Evidence Owner	Criteria	EDAM Measurable Elements	Threshold	Status	Description of Evidence
1	Execution of Necessary Agreements	Joint	Execution of Necessary Agreements	The prospective EDAM Entity and others as applicable have executed all necessary agreements.	The prospective EDAM Entity and others as applicable will execute all applicable agreements, as outlined in Section 2.2 of the EDAM BPM within the required timelines.	Complete	EDAM Entity provides copies of all executed agreements. ISO provides evidence that the planned agreement tasks are all complete (Completed Agreements Checklist).
2	Operations Training	EDAM Entity	All training as outlined in the EDAM Entity's Training Plan is complete	In preparation for EDAM implementation, the prospective EDAM Entity will develop a training plan to educate entity staff who will have responsibility for EDAM operations, market transactions, and settlements.	Prospective EDAM Entity staff will complete role-based training in the appropriate timeframes as outlined in the EDAM Entity's Training Plan and the EDAM Course Catalog. EDAM Entity provides that all identified staff have received training as required by the EDAM Entity's Training Plan and the EDAM Course Catalog.	Complete	Prospective EDAM Entity provides email evidence stating that all identified staff have received training as required by the EDAM Entity's Training Plan and the EDAM Course Catalog.
3	Forecasting Capability	ISO	Load forecast capability	<ul style="list-style-type: none"> Definition of EDAM demand day ahead forecast boundaries based on the conforming and non-conforming load characteristics, as applicable Documentation of EDAM Entity's choice of day-ahead demand forecast provider and how the demand forecast will be completed If EDAM Entity chooses to self-submit a demand forecast for use in EDAM, WEIM, and RC West, and if Entity meets all ISO Tariff and forecast capability requirements If entity provided day ahead demand forecast, then sign off on data flow of required demand forecast data from entity Submittal of accuracy and evaluation of the ISO or entity provided day ahead demand forecast of EDAM demand based on historical actual load data for the defined EIM demand forecast boundaries Identification of weather station(s) locations used in forecasting, if applicable 	All Plant Information (PI) tags and historical data for defined load area(s), and non-conforming load, if applicable, compared with DA load forecasts provided. EDAM Entity provides confirmation via documentation provided stating demand forecast boundaries for its conforming and non-conforming load characteristics and choice of demand forecast provider for Market and RC. If ISO Forecasting is selected: EDAM BAA and ISO will provide document with weather stations utilized and weightings EDAM Entity providing external forecast must demonstrate delivery of Unit MW forecast by 6am for 1 day ahead through 7 days ahead.	Complete	ISO Short term Forecasting team provides Demand Forecasting Report analyzing hourly demand forecast accuracy. Note the forecast accuracy may be evaluated against STF-generated forecasts from prior years and/or the EDAM Entity's externally provided forecast. Multiple metrics across multiple evaluation horizons may be included, such as average MAPE across all hours or MAE during peak hour.
4	Forecasting Capability	ISO	Variable Energy Resource (VER) forecast capability	<ul style="list-style-type: none"> Identification of the source of day ahead VER forecasts. (If a participating wind or solar unit requires a ISO forecast, then BPM and Tariff requirements apply.) Accuracy of the ISO day ahead renewable forecast of EDAM VER resource Identification of all Hybrid Resources and applicable tariff and BPM requirements are met 	Real-time MW production PI tags for all Resources, and metrological measurements required for Hybrid Resources, compared with DA VER forecasts provided. EDAM entity confirms via documentation stating selection of VER Forecast Provider. EDAM Entity providing external forecast must demonstrate delivery of Unit MW forecast by 6am for 1 day ahead through 7 days ahead. EDAM Entity providing external forecast must also provide DAM schedule.	Complete	ISO short term forecasting provides VER Forecasting report, analyzing VER forecast accuracy.
5	Forecasting Capability	ISO	Imbalance reserve requirements (IR)	<ul style="list-style-type: none"> Provision of ISO Historical data on Day Ahead Demand and renewable forecast information to fill the needed historical data period to produce the imbalance requirements at the net load level ISO has established imbalance requirements for the prospective EDAM Entity Balancing Authority Area and the combined EDAM Area including the prospective EDAM Entity 	The ISO has received a CIDI ticket with historical data needed for initializing mosaic IR requirement from the prospective/onboarding EIM/EDAM Entity. Internal & Partially External - ISO load forecast and external VER deliveries need to be streaming to BARC (To integrate ALFS and downstream applications regardless of external deliveries)	Complete	ISO Short term Forecasting team provides IR in stage environment market output and IR accuracy report.
6	Resource Sufficiency Evaluation	EDAM Entity	Resource Sufficiency Evaluation test	The prospective EDAM Entity Scheduling Coordinator demonstrates its ability to pass the resource sufficiency evaluation test for the prospective EDAM Entity's Balancing Authority Area	Resource Sufficiency Evaluation Test passes 90% of the time (22 hours of the 2- hour day) or greater, with failed hourly intervals within 5% for each failed hour for five non-consecutive days during Parallel Operations.	Complete	Screen shots of the RSE reports from CMR report showing the 90% pass rate
7	Transmission Availability	EDAM Entity	The prospective EDAM Entity registers with the ISO all the transfer path with other EDAM BAA that could be available for EDAM Transfers.	Validation of the completed EDAM entity TSR definition template.	The prospective EDAM entity submits the TSR definition template (before start of Market SIM) and it is approved by the ISO team, and successfully registered in advance of Parallel Operations.	Complete	TSR definition template approved by the ISO team
8	Operating Procedures	EDAM Entity	Prospective EDAM Entity operating procedures	The prospective EDAM Entity's operating procedures are defined, updated, and tested. If any EDAM Entity operating procedures may impact Entity customers' participation in EDAM, then customers are properly notified.	Prior to parallel operations, the prospective EDAM Entity's operating procedures are defined, updated, and tested.	Complete	EDAM Entity provides screenshots and an email confirming the documentation is complete and updated, and that customers have been properly informed.

9	System Readiness & Integration	Joint	Prospective EDAM Entity Identification and system certificates and access	Validation of SCID's and Resource ID's. All prospective EDAM Entity employees who require system access to perform EDAM-related job functions identified and have necessary certificates.	All prospective EDAM Employees performing job functions for EDAM market are identified. All ISO issued certificates are requested within the appropriate timeframes. All identified employees provided the necessary EDAM system access certificates.	Complete	EDAM Entity provides an email stating that all access is in place for Market Simulation and a plan is in place to ensure all access is in place for production. Customer Onboarding specialist provides an email confirming that access is in place and there is a plan for ensuring access for Production.
10	Market Simulation	Joint	Market Simulation and structured scenario execution	The prospective EDAM Entity operators execute and pass all structured scenarios provided by ISO.	All significant issues resolved or have an interim solution that is functionally equivalent. Note: "Significant issues" are defined as open CIDI tickets or associated software variances with High or Critical severity that materially impact market functionality, simulation results, or settlement accuracy. Any exceptions will be explained or have an interim solution that is functionally equivalent. Lower-severity items may remain open provided they do not affect the ability to execute or validate structured scenarios and have no operational or market impact.	Complete	ISO provides a completed Structured Scenario Reports (Detailed Input-Output for Structured Scenarios by week) and a Structured Scenario Status matrix. EDAM Entity sends a confirmation email identifying any approved incomplete cases/validations. ISO sends confirmation email.
11	System Readiness & Integration	EDAM Entity	System and Functional Testing	The prospective EDAM Entity will test the functional and system elements, including all interfaces between ISO and the EDAM Entity, in accordance with functional and system testing documentation posted on the ISO website.	All tasks identified in the functional and system testing documentation are complete and will not have any issues deemed significant. Any exceptions will be explained or have an interim solution that is functionally equivalent.	Complete	EDAM Entity provides the EDAM Functional and System Testing Summary or equivalent indicating that the Functional Testing is complete. EDAM Entity may also include reports from their test system showing that all test cases were executed and passed, identifying any approved incomplete cases and interim solution. ISO Integration Lead sends confirmation email.
12	Settlements	Joint	EDAM Scheduling coordinators (Entity or PRSC) direct settlement with ISO.	The ISO Settlement statements and invoices match the operational data published to stakeholders or fed into settlement system and the resulting calculations correspond to the formulas defined in ISO's tariff and BPMs	Daily and /or Monthly settlement statement and Weekly invoice that correspond with appropriate Settlement statements. Settlements produced during parallel operations are verifiably accurate against available data.	Complete	ISO will ensure that we publish all the related Settlement Statements and Invoices during Market Simulation and Parallel Operations. We also confirm through Track 5 calls. EDAM Entity emails that they understood all the changes related to charge codes with regard to DAME/EDAM.
13	Settlements	Joint	EDAM entities Settlement suballocations of Costs assigned to the EDAM entity.	Verification that settlement statements and invoices allocates charges and credits to its customers accurately reflecting system and market data.	The prospective Entity settlement statements and invoices that allocate charges and credits to its customers accurately reflect system and market data during parallel operations.	Complete	ISO will ensure that we publish all the related Settlement Statements and Invoices during Market Simulation and Parallel Operations. We also confirm through Track 5 calls. EDAM Entity emails that they understood all the changes related to charge codes with regard to DAME/EDAM.
14	Historical Transmission Revenue Recovery	Joint	The EDAM Entity provides the ISO with the information necessary to account for the EDAM recoverable revenue associated with the EDAM Transmission Service Providers in its Balancing Authority Area.	Verification that the EDAM Entity submitted EDAM recoverable revenue has been incorporated into the EDAM recoverable charge codes including EDAM recoverable rates and assessment to gross load.	Daily settlement statement and Weekly invoice that correspond with appropriate Settlement statements. Settlements produced during parallel operations are verifiably accurate against available data.	Complete	ISO calculates the EDAM Access charge based upon EDAM recoverable amount provided by EDAM Entity. Confirmation provided via email.
15	Parallel Operations	Joint	Parallel Operations Technology Criteria	Ensures all transfers between neighboring BAs, EDAM and WEIM entities are configured accurately for market operations and settled correctly.	DA market Completion within timeline 90% of the time All significant issues resolved or have an interim solution that is functionally equivalent.	Complete	1. CAISO certification confirming DA market completion within the required timeline at least 90% of the time, or documented justification for any exceptions where the threshold was not met. 2. There are no open CIDI tickets with significant issues or related software variances. Any remaining variances are

							supported by CAISO QRB-approved workarounds or interim solutions that provide functional equivalence as agreed to by the EDAM Entity and ISO.
							3. Entity Requirement: Entity validation confirming that Masterfile resource configurations, PAC BAA network models, and BAA transfer and TSR setups have been reviewed, validated, and reconciled with settlement results, with no material discrepancies remaining. Any exceptions will be explained or have an interim solution that is functionally equivalent.
16	Parallel Operations	ISO	Parallel Operations market quality review	Market results are appropriate and prices are validated based on input data during Parallel Operations.	The ISO Market Quality team validates Parallel Operations prices and megawatt schedules/dispatches.	Complete	ISO Market Quality team provides analysis report on the Market Solution, prices, and quality of data.