

 California ISO	Technology	Template Version:	1
		Document Version:	1
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	3/17/2026



EDAM Track 6 Overview - Training and Operations Readiness

Document Owner: **Carder, Heidi**

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

REVISION HISTORY

VERSION NO.	DATE	REVISED BY	DESCRIPTION
1.0	10/22/2024	R. Madrigal	Initial document created. Draft mode as EDAM Readiness Criteria is still being established.
1.1	3/16/26	H. Carder	Updated document to incorporate changes for 2027 onboarding entities based on lessons learned. Updates to timelines and readiness criteria. Reference to Track 7.
2.0	3/17/26	H. Carder	Inserted new section 3.1 to better define overview training efforts, Fundamentals Training and Roles & Responsibilities. Updating order and timing in section 6 table, Key deliverables. Made grammatical edits throughout document.
2.1	4/23/26	B. Beljean	<u>Section 2:</u> - Updated the intro paragraph to reference a "formal training plan" and six (6) distinct learning paths - Replaced the existing 6 brief bullet labels with fully expanded Learning Path descriptions (LP1 through LP6), including audiences and scope for each <u>Section 3:</u> - Updated the opening paragraph to explicitly frame the training as a "Formal Training Plan" structured around six learning paths targeting all relevant audience groups - Added a new subsection 3.5 – Ad-Hoc Training Requests (inserted after Workshop Participation) covering the purpose, submission process, prioritization logic, and CAISO coordination for Learning Path 6 <u>Section 6.1:</u> - Added Figure 6.1 immediately after the training deliverables table with a description and formatting guidance for a swim lane timeline graphic (T-18 through T+6, color-coded by owner: CAISO vs. EDAM Entity) <u>Section 6.2:</u> - Added Figure 6.2 after the Operations Readiness table with a description and formatting guidance for a two-column process

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

			card diagram illustrating both readiness requirements (Req. #2 and Req. #8) <u>(NEW) Appendix C – EDAM Training Plan Template:</u> Full structured template with 6 sections: Plan Overview, Designated Trainers, Learning Path Coverage (6 LPs), Role-to-Training Mapping, Ad-Hoc Training Request Process, and Training Completion Tracking & Attestation — with table scaffolding for each
3.0	6/16/2026	B. Beljean	Significant update to replace and incorporate all content and format from EDAM Track 6 Training Handbook
4.0	9/30/26	H. Carder	Language throughout document updated for clarity. Section 4, Key Deliverable dates updated. CBT course map and instructor-led training topics added to Appendix B: Training Topics. General formatting throughout document.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

TABLE OF CONTENTS

1	Purpose	5
2	EDAM Track 6 Overview.....	5
3	Learner Groups	6
3.1	LG1: Management/Leads	8
3.2	LG2: Designated Trainers.....	9
3.3	LG3: Market Operations	11
3.4	LG4: Reliability Operations	12
3.5	LG5: Settlements Function	14
3.6	LG6: EDAM Entity Customers.....	15
3.7	LG7: Adjacent Entities	16
4	Key Deliverables	18
5	EDAM Operational Readiness.....	21
6	Resources and References.....	24
7	Key Considerations & Best Practices.....	25
8	Appendices	27
8.1	Appendix A: Designated Trainer Roles & Responsibilities	27
8.2	Appendix B: Training Topics	28
8.3	Appendix C: Training Plan Template	30
8.4	Appendix D: Readiness Criteria Sign-Off Responsibilities	36

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

1 Purpose

Welcome to the EDAM Training Handbook. This handbook is designed to provide Entities entering the California ISO's Extended Day-Ahead Market (EDAM) with a clear understanding of the training and readiness activities required throughout the onboarding process. It outlines:

- What is expected of your organization.
- Who should be trained.
- When training activities occur.
- How training and operating procedure readiness are measured.
- What must be completed before Market Simulation, Parallel Operations, and EDAM go-live.

Track 6 is the onboarding track dedicated to training and operational readiness. Running alongside the other onboarding tracks, Track 6 focuses on preparing impacted personnel, establishing operating procedures, and ensuring readiness for EDAM participation. The track culminates in two formal readiness attestations, required under the CAISO Tariff, that demonstrate the Entity has completed its training and operating procedure readiness activities before proceeding to Parallel Operations.

2 EDAM Track 6 Overview

Track 6 provides a structured framework for planning, coordinating, and tracking the training and readiness activities required throughout the EDAM onboarding process. Through a series of recurring meetings and defined deliverables, Track 6 helps ensure that an Entity's personnel, operating procedures, and training program are prepared to support successful EDAM participation.

To support these efforts, the CAISO Customer Readiness team has established seven Learner Groups that align to the key roles, responsibilities, and audiences involved in EDAM participation. Each Learner Group is tailored to the knowledge requirements and operational responsibilities of its intended audience.

CAISO Customer Readiness Education Trainers work closely with Track 6 Entity Leads to map the Entity's organizational roles and responsibilities to the appropriate Learner Groups and training curriculum. Individuals assigned to each Learner Group are expected to complete the applicable training activities, including required instructor-led sessions and CBTs, within the timelines established by the Entity's Training Plan. Training and readiness support continue through Market Simulation and Parallel Operations to help ensure personnel are prepared for EDAM go-live.

The chart on the next page describes these Learner Groups in more detail.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

Day-Ahead Market (DAM) Learner Groups (LG)

ID	Learner Group	Audience	Typical Roles Included
LG1	Management/Leads	Entity	Entity Project Managers, Leadership, Training SMEs, Track 6 Leads
LG2	Designated Trainers	Entity	Entity Designated Trainers, Training Liaisons (optional)
LG3	Market Operations	Entity SMEs	Marketers, Day-Ahead Traders, Resource Data Submitters, Transmission Services, Energy Schedulers, Outage Planners
LG4	Reliability Operations	Entity SMEs	Real-Time Reliability Operators, Real-Time Market Operators, Generation Operator/Plant Operator, Operations Engineers, Outage Planners
LG5	Settlements Function	Entity SMEs	Financial Settlements, Metering
LG6	EDAM Entity Customers	EDAM SCs/ Entity Customers	Entity Customers that become their own Scheduling Coordinators, Transmission Customers, Load Serving Entity's within the Entity's Balancing Authority Area (BAA)
LG7	Adjacent Entities	Adjacent SCs/BAAs	Non-EDAM BAAs impacted by the entity joining EDAM

3 Learner Groups

The following subsections provide a detailed breakdown of each Learner Group throughout the Track 6 process:

- Who is the audience?
- What do they need to learn?
- When does training occur?
- What is to be expected?

Figure 1 illustrates the relationship between the EDAM Entity and the seven Learner Groups that support EDAM readiness. The roles, responsibilities, and training requirements associated with each Learner Group are described in greater detail throughout this handbook.

 California ISO	Technology	Template Version:	1
		Document Version:	3.0
		Date Created:	6/16/2026

EDAM Track 6 Overview – Training and Operations Readiness

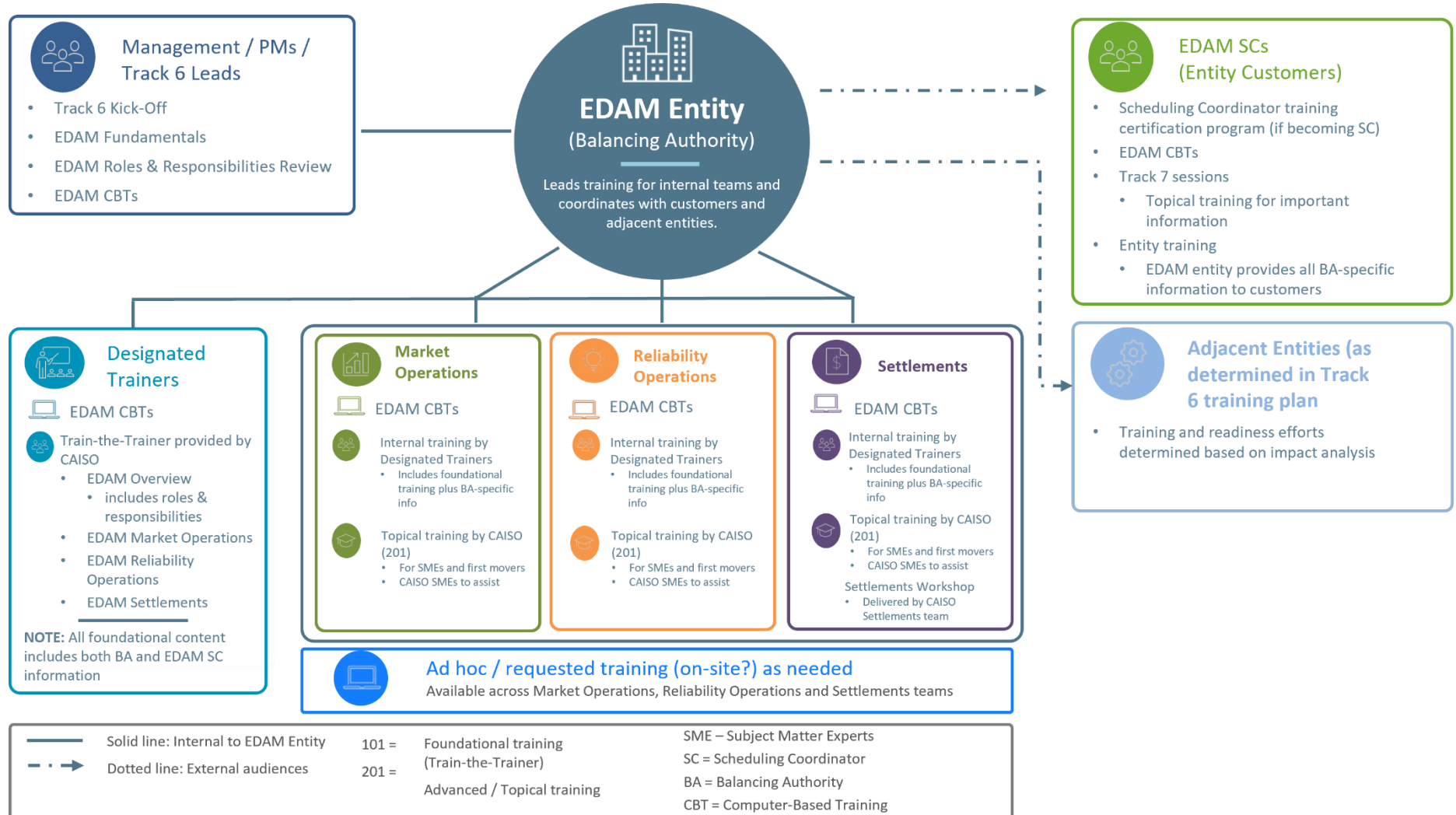


Figure 1: Track 6 EDAM Training Diagram

 California ISO	Technology	Template Version:	1
		Document Version:	3.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	6/16/2026

3.1 LG1: Management/Leads

Primary Audience

Track 6 participants include individuals responsible for planning, coordinating, supporting, and overseeing EDAM training and readiness activities, including but not limited to:

- Project Managers
- Leadership
- Track 6 Leads
- Training Subject Matter Experts (SMEs)

Track 6 Leads represent the EDAM Entity throughout the Track 6 onboarding process and serve as the primary point of contact with the CAISO Customer Readiness team. They are responsible for coordinating the Entity's overall training and readiness program, including the development, execution, and maintenance of the Entity's Training Plan.

This includes identifying impacted roles, training needs, and readiness activities for personnel affected by EDAM implementation. Track 6 Leads should also identify training impacts and needs for customers within their Balancing Authority Area (BAA), as applicable, to support broader readiness planning and outreach efforts. To effectively manage these responsibilities, Track 6 Leads should maintain a comprehensive understanding of Track 6 requirements, training milestones, readiness criteria, and onboarding timelines.

Key Responsibilities

Track 6 Leads are responsible for:

- Attending scheduled Track 6 meetings and representing the EDAM Entity.
- Identifying impacted roles, training needs, and readiness activities within the organization.
- Identifying customer-facing training impacts and training needs within the Entity's BAA, as applicable.
- Coordinating the identification and assignment of Designated Trainers.
- Developing, maintaining, and submitting the Entity's Training Plan to CAISO.
- Monitoring training progress and ensuring training milestones and readiness deadlines are achieved.
- Tracking completion of training and operating procedure readiness activities.
- Submitting the required Track 6 readiness attestations to Customer Readiness prior to Parallel Operations.
- Serving as the primary liaison between the Entity and the assigned CAISO Project Manager.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

Training Curriculum

Management/ Leads		Completion Timing	Month <i>(For October Go-Live)</i>
LG1	Track 6 Kick-Off	T-18	April (prior year)
	Learning Management System (LMS) Population and LMS Reporting Walkthrough <i>(optional)</i>	T-17	May (prior year)
	EDAM CBT Core Curriculum	T-18 to T-16	April – June (prior year)
	Getting Ready for EDAM: Fundamentals Course	T-16	June (prior year)
	Getting Ready for EDAM: Roles & Responsibilities Course	T-16	June (prior year)

3.2 LG2: Designated Trainers

Primary Audience

Staff responsible for attending and participating in the EDAM Train-the-Trainer (T3) program and supporting the development and execution of the Entity's EDAM Training Plan, including:

- Designated Trainers responsible for delivering EDAM training to Entity personnel.
- Training Liaisons (optional).

Designated Trainers complete CAISO's Train-the-Trainer sessions and serve as the Entity's primary training resources throughout onboarding. They are responsible for incorporating CAISO guidance, vendor processes, and internal operating practices into training materials and delivering role-based training to impacted personnel. They may also support the development and implementation of EDAM-related operating procedures.

Designated Trainers are not required to hold formal training positions or job titles. They are often subject matter experts, change champions, or individuals with functional expertise who can help drive organizational readiness and adoption. At least one Designated Trainer must be a direct employee of the Entity; contractors may supplement the training team but may not satisfy this requirement.

Key Responsibilities

Designated Trainers are responsible for:

- Being identified by the Entity during early stages of onboarding (typically T-16 to T-14).
- Completing all assigned CBTs before attending Train-the-Trainer sessions.
- Attending the Train-the-Trainer sessions applicable to their assigned functional areas.
- Completing required teach-back exercises during Train-the-Trainer sessions.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

- Incorporating CAISO guidance, vendor processes, and internal operating practices into training materials.
- Developing, scheduling, and delivering role-based EDAM training to identified personnel.
- Supporting the communication and reinforcement of applicable operating procedures.
- Maintaining training completion records and supporting readiness attestation activities.
- Coordinating with Track 6 Leads on Training Plan execution, progress tracking, and recordkeeping.

Training Curriculum

Designated Trainers		Completion Timing	Month <i>(For October Go-Live)</i>
LG2	EDAM CBT Core Curriculum	T-18 to T-16	April – June (prior year)
	Getting Ready for EDAM: Fundamentals Course	T-16	June (prior year)
	Getting Ready for EDAM: Roles & Responsibilities Course	T-16	June (prior year)
	Train-the-Trainer (T3) Sessions*: • EDAM Markets • EDAM Operations • EDAM Settlements <i>*Applicable sessions depend on the topic area(s) the Designated Trainer will support</i>	T-12 to T-11	October – November (prior year)
	(Optional) On-Site Designated Trainer Internal Training Support	T-10 to T-8	December (prior year) – February (go-live year)

Train-the-Trainer (T3) Toolkit

CAISO provides Entities with a trainer toolkit containing:

- Practice and training materials for adapting to your organization's needs.
- Scenario-based exercises for Merchant, Operations and Settlements functions.
- Course materials sufficient to build your internal training program.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

3.3 LG3: Market Operations

Primary Audience

Staff performing day-to-day EDAM market activities including, but not limited to:

- Marketers
- Day-Ahead traders
- Short-term traders
- Energy schedulers
- Bid/e-tag submitters
- Transmission Services employees
- Energy Schedulers
- GRDT Submitters

Merchant Function staff are end-user participants responsible for executing EDAM market activities, including bid submission and management, self-scheduling, transmission service requests, and other market-related transactions through CAISO systems. To maximize knowledge retention and operational readiness, training for this audience should be delivered as close as practical to Market Simulation and Parallel Operations.

Training Curriculum

Market Operations		Completion Timing	Month <i>(For October Go-Live)</i>
LG3	EDAM CBT Core Curriculum	T-18 to T-16	April – June (prior year)
	Getting Ready for EDAM: Fundamentals Course	T-16	June (prior year)
	Getting Ready for EDAM: Roles & Responsibilities Course	T-16	June (prior year)
	Internal EDAM training delivered by Entity Trainers	Prior to Parallel Ops	Prior to June (go-live year)
	On site visit with CAISO Real-Time Market Operator/Real-Time Market Operations Engineers (RTMO/RMOE)	Prior to Parallel Ops	Prior to June (go-live year)
	Additional role-specific training sessions	T-10 to T-8	December (prior year) – February (go-live year)
	<i>(Optional) Additional CAISO-provided training support sessions for SMEs as needed</i>	T-10 to T-4	December (prior year) – June (go-live year)

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

Key CAISO Applications for Merchant Function Staff

SIBR — Submit and review Day-Ahead bids, self-schedules, TSR limits, CRN entitlements.

ALFS — Submit VER forecasts (Day-Ahead timeframe extension).

CMRI — Review market results, advisory RSE results, NSI data.

MasterFile — Submit resource data templates and contract definitions.

Secured Site — Review MPM results and market congestion.

3.4 LG4: Reliability Operations

Primary Audience

Staff responsible for Balancing Authority operations, reliability coordination, and grid operations activities, including but not limited to:

- Operations Engineers
- Grid/Power Operations Engineers
- Generation Schedulers/Coordinators
- Outage Coordinators/Planners
- GRDT Submitters

Reliability Function staff are responsible for supporting the reliable operation of the grid and the execution of EDAM-related operational processes. Their responsibilities may include resource modeling, outage coordination, transmission constraint management, balancing authority operations, and coordination with CAISO's WIDAOE team. Because operational decisions directly influence market outcomes, Reliability Function staff work closely with Merchant Function personnel and must understand the interaction between reliability operations and EDAM market processes.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

Training Curriculum

Reliability Operations		Completion Timing	Month <i>(For October Go-Live)</i>
LG4	EDAM CBT Core Curriculum	T-18 to T-16	April – June (prior year)
	Getting Ready for EDAM: Fundamentals Course	T-16	June (prior year)
	Getting Ready for EDAM: Roles & Responsibilities Course	T-16	June (prior year)
	<i>(Optional) Track 4 Integration and Testing Workshop (for technical/engineering staff).</i>	Prior to Market Sim	Prior to March (go-live year)
	Internal EDAM training delivered by Entity Trainers	Prior to Parallel Ops	Prior to June (go-live year)
	On site visit with CAISO Real-Time Market Operator/Real-Time Market Operations Engineers (RTMO/RMOE)	Prior to Parallel Ops	Prior to June (go-live year)
	Additional role-specific training sessions	T-10 to T-8	December (prior year) – February (go-live year)
	<i>(Optional) Additional CAISO-provided training support sessions for SMEs as needed</i>	T-10 to T-4	December (prior year) – June (go-live year)

Key Systems for Reliability Function Staff

WebOMS — Submit/adjust outage cards, manage transmission constraints, nomograms, contingencies.

MasterFile — Submit GRDT, IRDT, and Full Network Model updates.

Path Limit Calculator (PLC) — Submit Hourly TCOR Limits and Intertie Constraints (ITC).

SIBR — Review/adjust RUC Net Short Input, Net Export Constraint, and DA TSR Limits.

BAAOP — Coordinate market constraints in real-time operations.

CIDI — Submit Assistance Energy Transfers and new constraint requests

CMRI — Retrieve Market results and RSE results

Secured Site — Review market congestion and CCCM process recommendations.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

3.5 LG5: Settlements Function

Primary Audience

Staff responsible for settlements, metering, and related EDAM financial and data validation activities, including but not limited to:

- Settlements Analysts
- Metering Personnel

Settlements Function staff are responsible for supporting EDAM settlements and metering activities, including the validation, analysis, and reconciliation of market and meter data used in settlement calculations. These individuals rely on CAISO systems and reports to perform their day-to-day responsibilities and to understand the financial impacts of EDAM participation. To maximize knowledge retention and operational readiness, training for this audience should be delivered as close as practical to Market Simulation and Parallel Operations.

Training Curriculum

Settlements		Completion Timing	Month <i>(For October Go-Live)</i>
LG5	EDAM CBT Core Curriculum	T-18 to T-16	April – June (prior year)
	Getting Ready for EDAM: Fundamentals Course	T-16	June (prior year)
	Getting Ready for EDAM: Roles & Responsibilities Course	T-16	June (prior year)
	<i>(Optional) Track 5 Settlements Workshop</i>	Prior to Market Sim	Prior to March (go-live year)
	Internal EDAM training delivered by Entity Trainers	Prior to Parallel Ops	Prior to June (go-live year)
	Additional role-specific training sessions	T-10 to T-8	December (prior year) – February (go-live year)
	<i>(Optional) Additional CAISO-provided training support sessions for SMEs as needed</i>	T-10 to T-4	December (prior year) – June (go-live year)

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

3.6 LG6: EDAM Entity Customers

Primary Audience

Customers and market participants located within the joining EDAM Entity's Balancing Authority Area (BAA) whose operations may be affected by the Entity's participation in EDAM, including but not limited to:

- Scheduling Coordinators (SCs)
- Transmission Customers (TCs)
- Load Serving Entities (LSEs)

These external stakeholders may be impacted by changes to market participation processes, operating procedures, communications, and coordination activities resulting from the Entity's EDAM implementation. As part of its broader readiness efforts, the EDAM Entity is responsible for identifying affected stakeholders, communicating relevant EDAM impacts, and coordinating outreach and training activities as appropriate. These activities are closely aligned with both Track 6 (Training Readiness) and Track 7 (Customer Readiness).

Key Responsibilities

- Identify impacted SCs, TCs, LSEs, and other affected stakeholders within the Entity's BAA.
- Communicate EDAM awareness, onboarding timelines, and relevant readiness activities to affected customers and market participants.
- Direct customers to applicable CAISO EDAM training resources, including EDAM Fundamentals training available through the [CAISO Training Center Western Energy Markets](#) page.
- Ensure customers seeking to become CAISO Scheduling Coordinators complete all applicable Scheduling Coordinator certification and EDAM training requirements. For more information view the [Scheduling Coordinator](#) webpage.
- Communicate Entity operating procedures, business processes, and readiness activities that may affect customer participation in EDAM.
- Coordinate customer outreach and readiness activities as part of the Entity's overall onboarding and implementation efforts.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

Training Curriculum

EDAM SC/Customer Training Curriculum		Completion Timing	Month <i>(For October Go-Live)</i>
LG6	Scheduling Coordinator Certification Training (as applicable)	T-18 to T-4	April (prior year) – June (go-live year)
	EDAM CBT Core Curriculum	T-18 to T-4	April (prior year) – June (go-live year)
	Role-specific training sessions for EDAM SCs <i>(topics listed below in Appendix XX)</i> <i>Note: training sessions to be delivered during Track 7 meetings</i>	Prior to Parallel Ops	Prior to June (go-live year)
	<i>(Optional) Additional CAISO-provided training support sessions as needed – requested through the Entity</i>	T-10 to T-4	December (prior year) – June (go-live year)

3.7 LG7: Adjacent Entities

Primary Audience

Non-EDAM entities in adjacent Balancing Authority Areas (BAAs) that have operational, transmission, or transactional relationships with the joining EDAM Entity and may be affected by its participation in EDAM.

Although these entities are not joining EDAM themselves, they may experience changes to existing business processes, operational procedures, communications, or coordination activities as a result of the onboarding Entity's EDAM implementation. The EDAM Entity is responsible for identifying impacted adjacent entities and providing appropriate outreach, awareness, and communication regarding those changes.

Key Responsibilities

- Identify adjacent BAAs and evaluate how existing operational and transactional interactions may be affected by EDAM participation.
- Communicate relevant EDAM-related changes, expectations, and readiness activities to impacted adjacent entities.
- Coordinate outreach and awareness activities to support a smooth transition and ongoing operational coordination.
- Communicate any Entity operating procedures, business processes, or coordination requirements that may affect adjacent entities prior to Parallel Operations (Operating Procedure Readiness Requirement #8).

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

Training Curriculum

Adjacent Entities		Completion Timing	Month <i>(For October Go-Live)</i>
LG7	Outreach, training, and/or communications and notifications regarding operational changes	Prior to Parallel Ops	Prior to June (go-live year)
	<i>(As needed) Ad hoc Training for given specific Adjacency structure and transaction scenarios</i>	Prior to Parallel Ops	Prior to June (go-live year)

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

4 Key Deliverables

Track 6 deliverables and milestones for both CAISO and the EDAM Entity are outlined in the table below. Timing is expressed in months relative to the Entity's EDAM go-live date (T), with "T" representing the go-live date. Entities should make every effort to complete each deliverable by the indicated milestone to support readiness for Parallel Operations. All dates are approximate and may be adjusted based on the Entity's onboarding schedule. CAISO Project Managers monitor progress throughout the onboarding process and will address any readiness concerns during Track meetings with applicable leads.

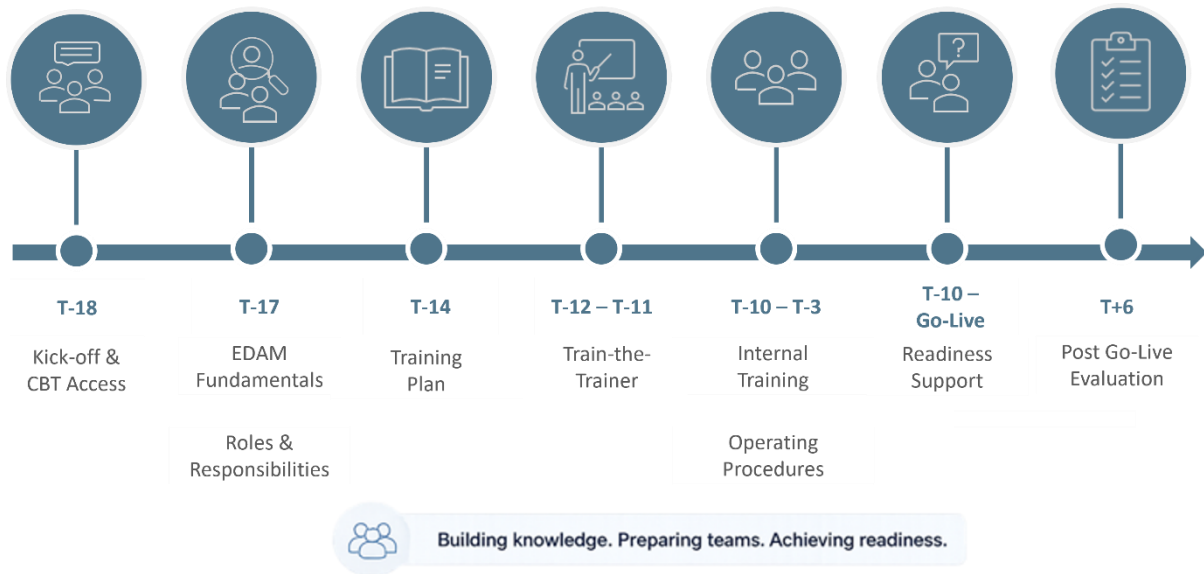
Timing (T-Month)	Owner	Deliverable	Description	Format
T-18	CAISO	Track 6 Kick-Off Meeting	Webinar introducing the EDAM training program, key training activities, and available CAISO support resources.	Meeting / Webinar
T-18	CAISO	EDAM CBT Training Access via Learning Management System (LMS)	EDAM CBT modules are available through either the CAISO LMS or an entity's LMS. CAISO provides a bulk-upload spreadsheet that allows entities using the CAISO LMS to provision user access and assign CBT courses. Designated Trainers complete CBTs early in the onboarding process, while end users complete training closer to Parallel Operations. Entities may also request access to WEIM CBTs through the CAISO LMS to track refresher training completion.	CBT / LMS
T-17	EDAM Entity	LMS User Import Spreadsheet (optional)	Spreadsheet submitted to CAISO to provision user access to EDAM CBT courses in the CAISO LMS.	Excel
T-17	CAISO	LMS Reporting Walkthrough (optional)	Optional session for LMS Administrators using the CAISO LMS, covering reports used to track CBT completion and learner progress.	Virtual Session
T-16	CAISO	EDAM Fundamentals Training	Foundational training session introducing key EDAM concepts, terminology, and market functions.	Virtual Session

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

T-16	CAISO	Roles & Responsibilities Training	Introductory training session providing an overview of EDAM roles, responsibilities, and key participant obligations.	Virtual Session
T-16 to T-14	EDAM Entity	Define Roles & Responsibilities	Entity aligns CAISO-defined EDAM roles with internal staff functions and applicable customer or adjacent-party relationships.	Report
T-16 to T-14	EDAM Entity	Identify Designated Trainer(s)	Entity designates one or more trainers to attend applicable Train-the-Trainer sessions, incorporate CAISO, vendor, and internal practices into training materials, and deliver role-based training for their assigned functional areas.	Report
T-14	EDAM Entity	Completed EDAM Entity Training Plan	EDAM Entity documents its training approach and schedule using the Training Plan template provided in Appendix C and submits the completed plan to CAISO via Kiteworks.	PDF
T-12 to T-11	CAISO	Train-the-Trainer (T3) Sessions	Designated Trainers attend the Train-the-Trainer sessions applicable to their assigned functional areas, receive in-depth EDAM instruction, and complete a teach-back exercise.	Virtual Sessions
T-10 to T-3	EDAM Entity	Entity EDAM Procedures	EDAM Entity develops EDAM operating procedures for internal personnel and, as applicable, customer-facing activities within its service area.	Varies per Entity
T-10 to T-3	EDAM Entity	Entity Staff Training Delivery	Entity trainers conduct role-based EDAM training, including operating procedures, for identified personnel according to the approved Training Plan.	Varies per Entity
T-10 to T-3	CAISO	Entity Staff Training Support	CAISO provides supplemental support to entity-led training efforts upon request.	Varies per Entity
T-7	EDAM Entity	Readiness Requirement Attestation	Entity submits attestations confirming completion of required training and operating procedure readiness activities prior to Market Simulation. See Section 5 for additional details.	Email
T-3 to T-2	CAISO	Parallel Operations Support	CAISO provides training support during the parallel operations lead-up period as needed.	Varies per Entity
T (Go-Live)	CAISO	Go-Live Support	CAISO training staff are available before and after go-live to provide additional training and readiness support as needed.	Varies per Entity
T+6	CAISO	Post Go-Live Evaluation	Post-training assessment to evaluate effectiveness and identify improvement opportunities.	On-site Visit

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

The illustration below highlights the key training milestones and activities that occur throughout the EDAM onboarding journey, from kickoff to go-live.



 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

5 EDAM Operational Readiness

As part of the Track 6 readiness process, each EDAM Entity must submit two formal attestations confirming completion of its training and operating procedure readiness activities. These attestations serve as evidence that the entity has executed its Training Plan, delivered the required training to impacted personnel, and established and communicated applicable EDAM operating procedures. The requirements are defined under the FERC-approved CAISO Tariff and are tracked through the EDAM Readiness Criteria Worksheet.

Readiness Requirements Overview

Requirement	Description of Evidence	Timing	Format
Req. #2 – Operations Training	Entity provides email attestation to CustomerReadiness@caiso.com (cc CAISO PM) confirming all staff identified in the Training Plan have completed required training per the EDAM Course Catalog.	Prior to Parallel Operations	Email Attestation
Req. #8 – Operating Procedures	Entity's EDAM Operating Procedures are defined, updated, and tested. If procedures impact Entity customers, customers have been notified. Entity provides email attestation and optional screenshots via Kiteworks.	Prior to Parallel Operations	Email Attestation + Optional Screenshots

Requirement #2 — Operations Training

Criteria

- The EDAM Entity provides role-based training in accordance with its approved Training Plan and the applicable EDAM training curriculum.
- Measurable Element
- The Entity develops and executes a Training Plan to prepare personnel responsible for EDAM operations, market transactions, settlements, and other impacted business functions.

Threshold

- Identified personnel complete the training applicable to their roles within the timeframes established in the Entity's Training Plan. The Entity attests that all required staff have received the training necessary to support EDAM participation.

Timing

- The training attestation must be submitted to the CAISO Customer Readiness team prior to the start of Parallel Operations.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

Evidence Required

- An email attestation from the Track 6 Entity Lead must be submitted to CustomerReadiness@caiso.com and copied to the assigned CAISO Project Manager. LMS completion reports may be provided as supporting documentation through Kiteworks. The Entity is responsible for maintaining its training records and evidence of completion.

Requirement #8 — Operating Procedures

Criteria

- The EDAM Entity establishes, maintains, and implements operating procedures that support its EDAM-related business processes and responsibilities.
- Measurable Element
- The Entity develops, validates, and maintains EDAM operating procedures for impacted business functions. Where applicable, procedures that affect customer participation or interactions are communicated to the appropriate external stakeholders.

Threshold

- Prior to Parallel Operations, all applicable EDAM operating procedures have been defined, updated, validated, and communicated to the appropriate internal personnel and external stakeholders, as applicable.

Timing

- The operating procedure readiness attestation must be submitted to the CAISO Customer Readiness team prior to the start of Parallel Operations.

Evidence Required

- An email attestation from the Track 6 Entity Lead must be submitted to CustomerReadiness@caiso.com and copied to the assigned CAISO Project Manager. Supporting documentation, such as operating procedures or screenshots, may be provided through Kiteworks. Entities may also request a CAISO SME review of draft procedures prior to finalization.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

Sample Attestation Language

The following sample language is optional and provided to help streamline attestation submissions:

Requirement	Sample Attestation Language (Optional)
Req. #2 – Operations Training	“Please consider this email as confirmation that [Organization] has completed EDAM Track 6 Onboarding Requirement #2, Operations Training. This confirms that the prospective EDAM Entity has successfully completed all training as outlined in its Training Plan and the EDAM Course Catalog.”
Req. #8 – Operating Procedures	“Please consider this email as confirmation that [Organization] has completed EDAM Track 6 Onboarding Requirement #8, Operating Procedures. This confirms that required Operating Procedures have been defined, tested, and updated, and shared with applicable internal staff. Customers and adjacent WEIM entities have also been appropriately notified.”

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

6 Resources and References

The resources listed below provide guidance, reference materials, and supporting information for EDAM training.

Resources	Description
<u>EDAM FAQ Guide</u>	Frequently updated guide containing commonly asked questions and answers related to EDAM.
<u>EDAM Resource Guide</u>	Online resource providing links to EDAM websites and portals, knowledge resources, role-based training materials, and instructor-led course content.
<u>CAISO Training Center</u>	CAISO's public Western Energy Markets training webpage.
<u>CBT Course Catalog</u>	Comprehensive library of Computer-Based Training (CBT) courses covering a broad range of market and operational topics.
<u>Learning Management System (Knowledge Anywhere)</u>	CAISO's Learning Management System (LMS) for accessing, completing, and tracking training courses and certifications.
<u>Western Energy Market website</u>	Website providing information on EDAM participation, onboarding activities, and related resources.
<u>Western Energy Markets portal</u>	Secure portal for WEIM and EDAM participants (certificate required).
<u>CAISO Calendar</u>	Online calendar of CAISO events, meetings, workshops, and training activities.
<u>Stakeholder Center</u>	Webpage containing stakeholder initiatives, policy development activities, and stakeholder process information.
<u>CAISO Glossary of Terms</u>	Reference guide containing definitions of common CAISO, energy market, and electric grid terms and acronyms.
<u>CAISO Tariff</u>	Repository of the FERC-approved CAISO Tariff, including market rules, operating requirements, and governing appendices.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

7 Key Considerations & Best Practices

Timing of Training for Maximum Impact

Track 6 Leads and Designated Trainers should complete CBTs early in the onboarding process to build the foundational knowledge needed to support training planning and delivery. End-user training for Merchant, Reliability and Settlements Function staff is most effective when delivered closer to Parallel Operations (T-10 to T-4), when knowledge can be applied more immediately. CAISO recommends avoiding end-user training too early in the onboarding process, as retention and training effectiveness may diminish before go-live activities begin.

Subject Matter Expert (SME) Strategy

CAISO recommends identifying internal SMEs early in the onboarding process for key functional areas, including:

- Metering
- Settlements
- Market/Trading (Merchant Function)
- Reliability/Grid Operations (Reliability Function)
- Transmission
- Resource Management
- Operational Planning/Engineering

These individuals become the Entity's primary EDAM subject matter experts and should be actively engaged throughout implementation activities, including training, functional testing, Market Simulation, and Parallel Operations. SMEs work with Designated Trainers to incorporate CAISO guidance, vendor processes, and internal operating practices into role-based training materials and delivery.

Customer and Adjacent Entity Preparation

Preparing customers and adjacent entities for EDAM participation is an important component of readiness. EDAM Entities should identify and communicate training needs for EDAM Scheduling Coordinators, Load Serving Entities, Transmission Customers, and adjacent WEIM entities as part of their overall onboarding activities. These efforts should begin early and be coordinated through Track 7 activities, which closely align with Track 6 training and readiness efforts.

Ad Hoc Training Requests

CAISO recognizes that additional training needs may arise during onboarding. Track 6 Leads and Designated Trainers may request supplemental training support by contacting CustomerReadiness@caiso.com or their assigned CAISO Project Manager. Requests are

Owner: Carder, Heidi

Program Management Office

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

reviewed and prioritized based on scope, schedule, and proximity to go-live. Support may include targeted virtual sessions, supplemental materials, SME office hours, or guidance on existing training resources. Any supplemental training delivered should be reflected in the Entity's training records and readiness activities, as applicable.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

8 Appendices

8.1 Appendix A: Designated Trainer Roles & Responsibilities

Designated Trainers play a critical role in preparing an Entity's staff and, as applicable, impacted customers for EDAM participation. Designated Trainers are identified by the Track 6 Lead and serve as champions for organizational readiness and change management throughout the onboarding process. **Formal training experience or a trainer job title is not required.** Instead, Designated Trainers are typically individuals with strong functional knowledge who can effectively support the adoption of EDAM processes, operating procedures, and training within their assigned areas of responsibility.

Responsibility Area	Details
Prerequisite Knowledge & Skills	Complete applicable CBTs prior to Train-the-Trainer (T3) session attendance. Possess general knowledge and/or expertise of the role(s) the Entity assigns the individual to train. Demonstrate willingness to learn new information quickly and communicate changes to Entity staff.
Train-the-Trainer Participation	Attend the Train-the-Trainer (T3) sessions. Actively participate in teach-back activities during the T3 Workshop.
Instructor-Led Training Facilitation	Schedule and facilitate EDAM training sessions with Entity staff as determined per the Training Plan. Request support from CAISO Customer Readiness trainers as needed.
Active Collaboration & Recordkeeping	Respond to inquiries from the CAISO Customer Readiness team. Assist with incorporating CAISO-provided training materials into Entity training processes. Participate in regularly scheduled check-ins via phone/webinar. Coordinate with Track 6 Entity training coordinators on Training Plans and recordkeeping.

Observer Participation

EDAM Entities may elect to have additional staff attend Train-the-Trainer sessions as observers. Observer participation is intended to support knowledge transfer and future training readiness. Observers are not required to complete T3 class activities, assignments, or teach-back exercises. Observer attendance is optional and should be coordinated through the assigned CAISO Project Manager.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

8.2 Appendix B: Training Topics

CAISO continues to expand and enhance its EDAM training curriculum to support evolving onboarding and readiness needs. This appendix identifies the topics currently addressed through CAISO Computer-Based Training (CBT) modules and instructor-led courses. Course offerings and content are subject to change as new training materials are developed and as EDAM market processes, procedures, systems, tools, and participant requirements evolve.

Computer-Based Training Course Map

 **CALIFORNIA INDEPENDENT SYSTEM OPERATOR**
Extended Day-Ahead Market
 Instructor-Led and Computer-Based Training Course Map

1 STEP ONE Start with Core Knowledge **2 STEP TWO** Find your assigned track **3 STEP THREE** Complete the required CBTs **4 STEP FOUR** Complete the Instructor-Led Courses

Core Knowledge	COURSE 1	COURSE 2	COURSE 3	COURSE 4	COURSE 5	COURSE 6	COURSE 7
Reference courses applicable across roles — take as needed.	EDAM Overview Video	EDAM Processes and Timelines	EDAM Pricing Model	EDAM GHG Regulation Obligations	EDAM Bidding: Basic Concepts	EDAM Integration with WEIM	EDAM Training Program Reference

ROLE-BASED TRACKS Take only the tracks assigned to your role.

TRACK	TRACK	TRACK	TRACK
Merchant: Marketer/Trader	Grid/System Operations: Generation and Plant Operator	Grid/System Operations: Planning and Real-Time Operations	Grid/System Operations: Outage Management
1 EDAM Use of Transmission Contracts and Rights 2 EDAM Bidding: Intermediate 3 EDAM Resource Sufficiency Evaluation 4 EDAM Centralized and Coordinated Constraint Management 5 EDAM Interchange and e-Tagging	1 EDAM Resource Configuration and Modeling 2 EDAM Use of Transmission Contracts & Rights 3 EDAM Resource Sufficiency Evaluation 4 EDAM Interchange and e-Tagging 5 EDAM Impacts on Real-Time Market Operations	1 EDAM Use of Transmission Contracts and Rights 2 EDAM Bidding: Intermediate 3 EDAM Resource Sufficiency Evaluation 4 EDAM Centralized and Coordinated Constraint Management 5 EDAM Interchange and e-Tagging 6 EDAM Impacts on Real-Time Market Operations	1 EDAM Resource Sufficiency Evaluation 2 EDAM Centralized and Coordinated Constraint Management 3 EDAM Impacts on Real-Time Market Operations
Merchant: GRDT Submitter	Transmission	Post-Market Back Office: Financial Settlements	Post-Market Back Office: Metering
1 EDAM Resource Configuration and Modeling 2 EDAM Centralized and Coordinated Constraint Management	1 EDAM Resource Configuration and Modeling 2 EDAM Use of Transmission Contracts and Rights 3 EDAM Resource Sufficiency Evaluation 4 EDAM Interchange and e-Tagging 5 EDAM Impacts on Real-Time Market Operations	1 EDAM Metering 2 EDAM Settlements	1 EDAM Metering 2 EDAM Settlements

Required - Core Knowledge
Required - Reference Guide
Required by assigned track
 Color represents track category

ISO PUBLIC - © 2026 CIDI REVISED APRIL 2026

EDAM Train-the-Trainer Topics

The Train-the-Trainer series consists of instructor-led sessions covering the general topic areas listed below. Topics are subject to change and will be communicated through session agendas distributed prior to each year's training.

EDAM Market Operations

- EDAM Processes and Timelines
- Transmission Contracts and Rights
- Resource Configuration & Modeling
- EDAM Bidding Concepts (Intermediate)
- Resource Sufficiency Evaluation (RSE) for Markets
- Resource Adequacy and CIRA

Owner: Carder, Heidi

Program Management Office

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

- EDAM Greenhouse Gas Fundamentals & Market Concepts
- Interchange & e-tagging (for Markets)
- Teachback Activities

EDAM Reliability Operations

- EDAM Processes and Timelines
- Contingency Analysis
- EDAM Resource Sufficiency Evaluation (RSE) Scenarios for Real-Time Operations
- EDAM Resource Obligation and Performance
- Teachback Activities

EDAM Settlements

- EDAM Metering
- EDAM Settlements
- Teachback Activities

Monthly EDAM Training Meetings

Following completion of the applicable Train-the-Trainer sessions, Designated Trainers will be invited to participate in these ongoing sessions. Topics are driven by emerging needs and may include deeper dives into requested subject areas, reinforcement of key concepts, market enhancements, SME spotlights, and practical examples or walkthroughs. Designated Trainers may invite additional staff to attend based on the relevance of the topics being covered.

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

8.3 Appendix C: Training Plan Template

The template below is provided to assist EDAM Entities in documenting their EDAM onboarding training approach, schedule, and target audiences. The completed Training Plan must be submitted to CAISO and should describe how the Entity will address the training needs of each of the Learner Groups identified in Section 3 of this document.

The Training Plan serves as the Entity's roadmap for executing, tracking, and measuring training activities throughout the onboarding process. Submitted early in onboarding, the plan establishes the training strategy, milestones, and completion targets that will be used to monitor progress and support readiness discussions throughout implementation. Submission of the Training Plan is a required Track 6 readiness milestone and provides documented evidence of the Entity's approach to achieving training readiness in preparation for Market Simulation, Parallel Operations, and ultimately EDAM go-live.

1. Training Plan Overview

Training Plan Overview	
Entity Name	
EDAM Go-Live Target Date (T)	
Training Plan Version	
Date Prepared	
Prepared By (Name / Title)	
CAISO Project Manager	
Track 6 Lead(s)	

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

2. Designated Trainers

List all designated trainers and liaisons. At least one must be a direct employee of the Entity. See Appendix A for full role responsibilities.

Designated Trainers					
Trainer Name	Title	Department	Role (Trainer / Liaison)	Attended Train-The-Trainer (Y/N)	Date Identified

3. Training Audience

For each designated trainer, identify the internal groups and/or customer names they will be responsible for training.

Training Audience			
Trainer Name	Internal Groups	Customer Names	Notes

4. Learner Group Cross-Reference by Audience Group

For each audience group or customer listed above, indicate which Learner Groups (LG1–LG6) apply to them. Mark with ✓ if applicable, or N/A if not.

Learner Group Cross-Reference by Audience Group							
Audience Group (Internal or Customer groups)	LG1 Mgmt/Track 6 Leads	LG2 Designated Trainers	LG3 Merchant Function	LG4 Reliability Function	LG5 Settlements Function	LG6 EDAM SCs	LG7 Adjacent Entities
Mark with ✓ or N/A							

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

5. Learner Group Names

Record the official name for each Learner Group and note any internal naming conventions your organization uses.

Learner Group Names			
Learner Group	CAISO Default Name	Entity-Specific Name (if different)	Primary Owner / Coordinator
LG1	Track 6 Mgmt / Leads		
LG2	Entity Trainers		
LG3	Merchant Function		
LG4	Reliability Function		
LG5	Settlements		
LG6	EDAM Scheduling Coordinators (SCs)		
LG7	Adjacent Entities		

6. Tentative Planned Training Dates

Provide tentative planned training dates for each audience group. Dates may be updated as the plan evolves.

Tentative Planned Training Dates (by Audience Group)					
Audience Group	Learner Group(s)	Tentative Start Date	Tentative End Date	Format (Virtual / In-Person / CBT)	Trainer / Coordinator

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

7. In-Person Training Support from CAISO

Indicate whether your organization anticipates requesting any in-person training support from the CAISO Customer Readiness team. Requests must be coordinated through the assigned CAISO Project Manager.

In-Person Training Support Request (CAISO)				
Audience Group	Anticipated In-Person Support? (Y/N)	Requested Session Topic(s)	Preferred Timing / Date Range	Notes / Special Requirements

8. Vendors

List any third-party vendors your organization will be working with in connection with EDAM training implementation.

Vendors the Entity Will Work With				
Vendor Name	Vendor Role / Service	Scope of Training Involvement	Point of Contact	Notes

9. LMS Admin Information (if applicable)

If your organization uses a Learning Management System (LMS), list the administrators responsible for managing EDAM training content and records.

LMS Admin Information (if applicable)				
Admin Name	Title / Role	LMS Platform Used	Contact Email	Notes

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

10. Custom Content Development Plan

List all training content your organization plans to develop internally, including timelines and responsible owners.

Custom Content Development Plan					
Content Title / Description	Target Audience (LG)	Format (Deck / Job Aid / Video / etc.)	Development Owner	Target Completion Date	Status

11. Training Completion Tracking

Describe how your organization plans to track training completions for each Learner Group. LMS completion records may be uploaded to Kiteworks as supplemental evidence.

Training Completion Tracking Plan				
Learner Group / Audience Group	Tracking Method (LMS, Spreadsheet, Roster, etc.)	System / Tool Used	Person Responsible for Tracking	Notes
LG1 – Track 6 Leads				
LG2 – Entity Trainers				
LG3 – Merchant Function				
LG4 – Reliability Function				
LG5 – Settlements				
LG6 – EDAM SCs				
LG7 – Adjacent Entities				

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

12. Training Evaluation Process

Describe any evaluation processes your organization plans to use to assess training effectiveness (e.g., post-training surveys, knowledge checks, supervisor observation).

Training Evaluation Process				
Learner Group / Session	Evaluation Method (Survey / Quiz / Observation / etc.)	Administered By	Timing (Before / After / Both)	Notes / Tools Used

13. Email Distribution List — Track 6 / Training Questions

Provide names and email addresses for individuals who should receive communications related to Track 6 and EDAM training questions.

Email Distribution List — Track 6 / Training Questions				
Name	Title / Role	Email Address	List Purpose (Track 6 / Training / Both)	Notes

 California ISO	Technology	Template Version:	1
		Document Version:	4.0
EDAM Track 6 Overview – Training and Operations Readiness		Date Created:	9/29/2026

8.4 Appendix D: Readiness Criteria Sign-Off Responsibilities

Identify who is responsible for signing off on each EDAM readiness requirement. These individuals will submit the required attestations to CustomerReadiness@caiso.com prior to Parallel Operations.

Readiness Criteria Sign-Off Responsibilities				
Readiness Requirement	Responsible Individual (Name / Title)	Department	Target Date for Sign-Off	Notes
Req. #2 – Operations Training Attestation				
Req. #8 – Operating Procedures Attestation				
Overall Readiness Criteria Approval				