

General Information

Program Description - This course listing provides the EIM courses offered by the ISO. Each course is specifically designed to prepare new EIM entrants to be successful working with EIM. Details for each course is described in further detail in this listing.

The curriculum has three levels. Level 100 courses provide a high level understanding of EIM. These are considered introductory courses. Level 200 courses are comprised of computer based and classroom training designed to prepare the learners for EIM. The classroom training sessions are intended for EIM participant's trainers and SMEs so that they can develop procedures and training materials customized for their business processes and end users. Level 300 is hands on training. In this level, the learners will run through bid-to-bill scenarios and simulate the EIM experience.

Training schedule – The training curriculum is standard for all new EIM participants although the actual training schedule will be developed based on the proposed go-live date. Once agreements have been signed the training team will work with new participants to prepare the actual training schedule. If additional training dates are needed outside of the standard schedule, these may be considered customized training and will be charged according to our ISO customized training rate.

Courses

General Information	1
EIM 101 Introduction to the Energy Imbalance Market	3
EIM 102 How the Energy Imbalance Market Works.....	3
EIM 110 Market Timeline Mapping	3
EIM 111 EIM Operations Basics (NEW).....	3
EIM 112 Application Workshop for Management.....	3
EIM 120 Resource Data Template (RDT) Training.....	3
EIM 121 Access Identity Management (AIM)	4
EIM 122 Customer Inquiry and Dispute Information (CIDI)	4
EIM 210 SC Certification Workshop for EIM Entity	4
EIM 220 Managing Base Schedules.....	4
EIM 221 Submitting Bids	4
EIM 230 Outage Management System (OMS) Concepts	5
EIM 231 OMS Application	5
EIM 240 Real-time Market Interface (BAAOP) Overview	5
EIM 241 Automated Dispatch System.....	5

EIM 242 Multi-stage Generation (MSG)/Forbidden Operating Region (FOR) Scenarios.....	5
EIM 243 Variable Energy Resource (VER) Scenarios.....	6
EIM 244 EIM Interchange and E-tagging	6
EIM 250 Metering Concepts	6
EIM 251 Metering User Interface.....	6
EIM 260 Settlements 101.....	6
EIM 261 Settlements 201.....	7
EIM 270 Outputs – CMRI and OASIS.....	7
EIM 301 Hands-On Training	7

EIM 101 Introduction to the Energy Imbalance Market

Pre-requisite: None

Delivery Method: Computer Based Training

Description: This course provides a high level overview of the Energy Imbalance Market. Areas of study include the benefits of EIM, key players in EIM and timeline for implementation.

Intended Audience: Individuals with little to no knowledge about the Energy Imbalance Market.

EIM 102 How the Energy Imbalance Market Works

Pre-requisite: EIM 101 (suggested)

Delivery Method: Computer Based Training

Description: This course will familiarize the learner with the roles and responsibilities of the key players in EIM and the business processes that take place. Areas of study include the EIM process, settlements and resources.

Intended Audience: Individuals with little to no knowledge about the Energy Imbalance Market.

EIM 110 Market Timeline Mapping

Pre-requisite: EIM 102

Delivery Method: Instructor led

Description: This course highlights the new responsibilities of an EIM participant.

Intended Audience: Decision makers who need to understand the processes and

tasks that will be required of an EIM participant.

EIM 111 EIM Operations Basics (NEW)

Pre-requisite: EIM 102

Delivery Method: Computer Based Training

Description: This course will familiarize the learner with the roles and responsibilities of the applications and how they enable compliance with standards compliance. Areas of study include market timeline, sufficiency tests, response to contingencies and regulation rules.

Intended Audience: SMEs, trainers that will be training end users.

EIM 112 Application Workshop for Management

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course identifies how operator's duties will change with the implementation of EIM. The information from this course is key for the development of operating procedures. Areas of study include forward market processes vs. automatic generation control.

Intended Audience: Decision Makers and Operations Subject Matter Experts.

EIM 120 Resource Data Template (RDT) Training

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course prepares learners for completing the resource data template, the document used for describing the characteristics of resources in the EIM balancing authority. This course will also provide example of common pitfalls associated with incorrect or incomplete information.

Intended Audience: Staff who will be responsible for completed the RDT.

EIM 121 Access Identity Management (AIM)

Pre-requisite: None

Delivery Method: Instructor Led Training

Description: This course prepares learners to provision access for staff to ISO applications.

Intended Audience: Staff that are identified as Points of Contact (POCs).

EIM 122 Customer Inquiry and Dispute Information (CIDI)

Pre-requisite: None

Delivery Method: Instructor Led Training

Description: This course prepares learners to submit CIDI tickets to the ISO. CIDI is the primary method of submitting and tracking questions, issues and settlement disputes.

Intended Audience: Staff that will be interfacing with ISO staff.

EIM 210 SC Certification Workshop for EIM Entity

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This workshop and testing is a tariff requirement for those interested in becoming a scheduling coordinator. Areas of study include ISO background, market concepts, EIM basics, and tools, e-tagging and post-market processes. This course is required for entities that require certification as a Scheduling Coordinator in order to participate in EIM only.

Intended Audience: EIM Entity staff that will be performing the scheduling coordinator duties.

EIM 220 Managing Base Schedules

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: Learn how to manage the base schedule process. Highlights include base schedule basics, roles in base schedule management, using BSAP, base schedule timelines, balancing base schedules.

Intended Audience: Subject matter experts and trainers that will train end users responsible for submitting and validating base schedules.

EIM 221 Submitting Bids

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: Computer based training provides details of how to submit bids into the real-time market using SIBR.

Intended Audience: Subject matter experts and trainers that will train end users responsible for submitting and validating bids.

EIM 230 Outage Management System (OMS) Concepts

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course describes the process and responsibilities related to transmission and generation outage submission. There will be examples and scenarios outlining best practices.

Intended Audience: Subject matter experts and trainers that will train end users responsible for submitting and validating base schedules and bids.

EIM 231 OMS Application

Pre-requisite: EIM 260

Delivery Method: Computer Based Training

Description: Computer based training provides details of how to submit generation and transmission outages.

Intended Audience: Staff responsible for submitting transmission and generation outages.

EIM 240 Real-time Market Interface (BAAOP) Overview

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course prepares learners to use the BAAOP tool. This course will include a demonstration of EIM Entity market interface concepts, discuss primary displays the entity will use to balance their BA.

Intended Audience: This course is only open to subject matter experts and trainers that will be training EIM Entity Operators. This is not a Merchant function.

EIM 241 Automated Dispatch System

Pre-requisite: EIM 102

Delivery Method: Computer Based Training

Description: Computer based training provides details regarding ADS. This course covers the dispatch process, filtering and sorting and queries.

Intended Audience: Staff who will be responsible for responding to dispatch instructions.

EIM 242 Multi-stage Generation (MSG)/Forbidden Operating Region (FOR) Scenarios

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course describes scenarios affecting MSG and FOR

resources. Areas of study include defining Multi-stage generation and forbidden operating regions. The course will include interactive walkthroughs of MSG and FOR scenarios.

Intended Audience: Subject matter experts and trainers that will train end users responsible for submitting and validating base schedules and bids.

EIM 243 Variable Energy Resource (VER) Scenarios

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course describes the ISO rules for VER participation in EIM. Areas of study will include define and discuss Variable Energy Resource scenarios.

Intended Audience: Subject matter experts and trainers that will train end users responsible for submitting and validating base schedules and bids.

EIM 244 EIM Interchange and E-tagging

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course explores how interchange transaction occur in EIM. The course will explore how the interchange is handled in EIM and how the dynamic transfer works.

Intended Audience: Subject matter experts and trainers that will train end users responsible for submitting and validating base schedules and bids.

CAISO/CSSA/CRH

EIM 250 Metering Concepts

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course provides pertinent information to be successful processing settlement quality meter data.

Intended Audience: Subject matter experts and trainers that will train end users responsible for metering.

EIM 251 Metering User Interface

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course will cover the details of submitting meter data.

Intended Audience: Subject matter experts and trainers that will train end users responsible for metering.

EIM 260 Settlements 101

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: Introduction to ISO settlements and EIM energy settlements. Learners will be introduced to settlements validation. They will learn about the ISO settlements process. The class will also cover energy settlements and offsets.

Intended Audience: Subject matter experts and trainers that will train end users responsible for settlements.

resource, manual dispatch, transmission limit conforming and imbalance biasing.

EIM 261 Settlements 201

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course covers common EIM charge codes, including bid cost recovery, greenhouse gas settlements, grid management charges over and under-scheduling and flexible ramping.

Intended Audience: Subject matter experts and trainers that will train end users responsible for settlements.

Intended Audience: Subject matter experts and trainers that will train end users responsible on all aspects of the EIM.

EIM 270 Outputs – CMRI and OASIS

Pre-requisite: EIM 102

Delivery Method: Instructor Led Training

Description: This course covers two applications that are used to find market results and information.

Intended Audience: Subject matter experts and trainers that will train end users responsible for settlements and bid/base schedule submission.

EIM 301 Hands-On Training

Pre-requisite: EIM 102 and MP internal training

Delivery Method: Instructor Led Training

Description: Two day class covering common and important operational scenarios utilizing table top exercises. Examples of scenarios that will be covered include loss of an internal or external