BPM Change Management Meeting

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Housekeeping reminders



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The meeting is designed to encourage open, honest dialogue and the exchange of diverse perspectives.



Please keep all comments professional and respectful.

Instructions for raising your hand to ask a question

- If you joined audio through your computer or used the “Call Me” option, please use the **Raise Hand**  icon located at the bottom center of the Webex screen to join the question queue.
- If you are not logged into Webex and joined by phone only, please dial ***3** to enter the queue.
- When it is your turn to speak, please state your name and affiliation before making your comment.
- For technical assistance during the meeting, please send a chat message to the event producer.



California ISO Stakeholder Initiative Process



- Business Practice Manuals
  - The purpose of BPMs is to set forth business practices that implement the ISO tariff.
  - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
    - Policy changes submitted though the PRR process will be referred to the policy initiative road map process.
  - Each subject area in a BPM is based on enabling language in the ISO tariff.
    - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*

Agenda: BPM Change Management Meeting – October 27, 2026

Topic	Presenter
Introduction / Meeting Overview	Joseph Williamson-Duffney
Generator Management	Jill Jordan
Metering	Priyanka Namburi
Market Operations	Michael Martin
Market Instruments	Michael Martin
Energy Imbalance Market	Michael Martin
Reliability Requirements	Melanie Bogen
Resource Interconnection Standards	Daune Wilson
Settlements and Billing	Massih Ahmadi
Wrap-Up and Next Steps	Joseph Williamson-Duffney

BPM Change Management Process
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BPM for Generator Management

PRR	PRR Title	Stage
1703	Interconnection process enhancements 5.0 implementation for commercial viability criteria and contact requirements for agreements	Recommendation

PRR 1703 – Interconnection process enhancements 5.0 implementation for commercial viability criteria and contact requirements for agreements

- Reason for revision:
  - Implementation of IPE 5.0 tariff changes and clarification of requirement for contact changes in agreements.
- Recommendation comments received from: Bonnie Blair, Six Cities, October 13, 2026
- Recommendation comment period expired: October 13, 2026
- Next step: Post ISO final decision

BPM for Metering

PRR	PRR Title	Stage
1704	Update to meter inspection policy and market results interface-settlements access	Recommendation

PRR 1704 – Update to meter inspection policy and market results interface-settlements access

- Reason for revision:
  - Change in process for provisioning access to MRI-S
- Recommendation comments received from: None
- Recommendation comment period expired: October 13, 2026
- Next step: Post ISO final decision

BPM for Market Operations

PRR	PRR Title	Stage
1688	Formula details on fifteen-minute market (FMM) ex-post capacity calculations	Recommendation
1699	Clarifications on how intertie transmission corridor and intertie scheduling limits constraints are used for imbalance reserves	Recommendation
1700	Clarification on use for the automated dispatch system automatic generation control flag	Recommendation
1701	Removed three percent generation, three percent load from reserve requirement calculations	Recommendation
1706	Clean up of BPM due to minimum state of charge constraint retirement	Initial

PRR 1688 – Formula details on fifteen-minute market (FMM) ex-post capacity calculations

- Reason for revision:
  - This in an informational BPM update that outlines the formulas used in the FMM Ex-Post Capacity Calculations as well as graphed examples.
  - This PRR will go through a second round of recommendation comments.
- Recommendation comments received: None
- **Second** recommendation comment period expired: October 13, 2026
- Next steps: Post ISO Final Decision

PRR 1699 – Clarifications on how intertie transmission corridor and intertie scheduling limits constraints are used for imbalance reserves

- Reason for revision:
  - Imbalance Reserve awards from intertie resources are subject to applicable Intertie Transmission Corridor (ITC) and Intertie Scheduling Limit (ISL) constraints. These constraints ensure that sufficient intertie scheduling capability is available for Energy schedules, Ancillary Service awards, and Imbalance Reserve awards cleared in the IFM. This PRR details the design and includes formula-level detail
- Recommendation comments received from: None
- Recommendation comment period expired: October 13, 2026
- Next step: Post ISO final decision

PRR 1700 – Clarification on use for the automated dispatch system automatic generation control flag

- Reason for revision:
  - This PRR clarifies that the ADS AGC Flag should not be utilized as the sole indication that regulation has been awarded. It also outlines AGC expectations during a RTUC (HASP) market disruption.
- Recommendation comments received from: None
- Recommendation comment period expired: October 13, 2026
- Next step: Post ISO final decision

PRR 1701 – Removed three percent generation, three percent load from reserve requirement calculations

- Reason for revision:
  - Updated BPM to match NERC's retirement of the 3+3 Operating Reserve requirement July 1, 2026.
- Recommendation comments received from: None
- Recommendation comment period expired: October 13, 2026
- Next step: Post ISO final decision

PRR 1706 – Clean up of BPM due to minimum state of charge constraint retirement

- Reason for revision:
  - The CAISO retired minimum state of charge constraint in September 2023. This section is removed and replaced with "Not Used"
- Initial comments received from: None
- Initial comment period expired: October 13, 2026
- Next step: Post ISO recommendations

BPM for Market Instruments

PRR	PRR Title	Stage
1707	Two new customer market results interface reports as part of the EDAM enhancements 2026 project	Initial

PRR 1707 – Two new customer market results interface reports as part of the EDAM enhancements 2026 project

- Reason for revision:
  - This PRR introduces two CMRI changes. 1) An enhancement to the existing Real-Time Unit Commitment (RTUC) Advisory Schedules Report to provide it to EDAM/WEIM Entities and 2) A new Capacity Range Report that allows SC's to see IRU/IRD and RUC/RCD capacities.
- Initial comments received from: None
- Initial comment period expired: October 13, 2026
- Next step: Post ISO recommendations

BPM for Energy Imbalance Market

PRR	PRR Title	Stage
1705	Provides additional guidance on the steps required for a WEIM entity to terminate real-time market participation	Initial

PRR 1705 – Provides additional guidance on the steps required for a WEIM entity to terminate real-time market participation

- Reason for revision:
  - Outlines the high-level activities and considerations that the CAISO and a terminating WEIM Entity must jointly undertake to support an orderly withdrawal from the Real-Time Market, including coordination of market and intertie changes, scheduling and testing of system updates, evaluation of reliability impacts, stakeholder communications, and completion of all required operational and administrative actions.
- Recommendation comments received from: None
- Recommendation comment period expired: October 13, 2026
- Next step: Post ISO final decision

BPM for Reliability Requirements

PRR	PRR Title	Stage
1702	Clarifications and clean up	Recommendation
1708	Clarification on the existing net qualifying capacity deliverability study process for full capacity deliverability status and interim deliverability status resources	Initial
1710	Maximum import capability allocation and monthly transfer procedure due to CAISO branch group/scheduling point retirement	Initial

PRR 1702 – Clarifications and clean up

- Reason for revision:
  - This revision is being made to help clarify existing processes and clean up some sections of the BPM. Refer to specifics noted in the PRR.
- Recommendation comments received from: None
- Recommendation comment period expired: October 13, 2026
- Next step: Post ISO final decision

PRR 1708 – Clarification on the existing net qualifying capacity deliverability study process for full capacity deliverability status and interim deliverability status resources

- Reason for revision:
  - Provide clarity and describe the existing NQC deliverability study process and curtailment rules for FCDS and IDS resources, currently hosted by the superseded GIDAP BPM.
- Initial comments received from: None
- Initial comment period expired: October 13, 2026
- Next step: Post ISO Recommendation

PRR 1710 – Maximum import capability allocation and monthly transfer procedure due to CAISO branch group/scheduling point retirement

- Reason for revision:
  - To describe the Maximum Import Capability allocation and the new monthly transfer procedure that must be followed when a CAISO Branch group/Scheduling point retires.
  - Emergency PRR:
    - This PRR has an effective date of October 8, 2026. This PRR will be brought to the October BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the November/December series of meetings.
- Initial comments received from: None
- Initial comment period expires: November 16, 2026
- Next step: Initial Stakeholder Meeting

BPM for Resource Interconnection Standards

PRR	PRR Title	Stage
1695	New BPM for resource interconnection standards	On hold

PRR 1695 – New BPM for resource interconnection standards

- Reason for revision:
  - BPM for ISO Tariff Appendix KK
- New BPM for resource interconnection standards
  - PRR submitted 8/10/26. As this proposal introduces a new BPM, the ISO will hold additional stakeholder sessions and provide an extended comment period to review the proposed language.
- Initial comments received from:
  - Caitlin Liotiris and Molly Croll on behalf of American Clean Power – California
  - Susan Schneider on behalf of the Large-scale Solar Association (LSA)
  - Raeann Quadro on behalf of EDF Power Solutions
- Initial comment period expired: September 16, 2026
- Next steps:
  - PRR is on hold pending additional BPM stakeholder sessions.
  - Session details will be communicated via market notice.
  - PRR will return to the initial comment phase following BPM stakeholder sessions.

BPM for Settlements and Billing

PRR	PRR Title	Stage
1696	Emergency settlement release to fix high priority settlement variances and projects	Recommendation
1709	Emergency settlement release to fix high priority settlement variances and projects	Initial

PRR 1696 – Emergency settlement release to fix high priority settlement variances and projects

- Reason for revision:
  - This Emergency PRR captures Settlements changes associated to fixes for high priority variances and projects.
  - Emergency PRR:
    - This PRR has an effective date of May 1, 2026. This PRR was brought to the August BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the September/October series of meetings.
    - These changes were implemented on 8/13/2026
- Recommendation comments received from: None
- Recommendation comment period expired: October 13, 2026
- Next step: Post ISO final decision

Impacted Charge Codes *(details here)*
RUC_Net_Amount_6.1
RTM Net Amount_6.1
RTM Net Amount_6.0.2
Allocation of Transmission Losses Under Control Agreements_5.4
IFM Net Amount_6.1
64700 Real Time Instructed Imbalance Energy EIM Settlement_6.0.1
64600 FMM Instructed Imbalance Energy EIM Settlement_6.0.3
384 High Voltage Wheeling Revenue Payment_5.4.2
8080 Resource Sufficiency Evaluation Settlement_6.0.3
7071 Flexible Ramp Up Uncertainty Capacity Settlement_6.0.0b
6976 Trans Loss Obligation Charge for RT Schedules Under Control Agreement_5.3
6011 Day Ahead Energy Congestion Loss Settlement_6.0.2
495 Real Time GHG Offset_6.0.2
374 High Voltage Access Charge Revenue Payment_5.4.1

PRR 1709 – Emergency settlement release to fix high priority settlement variances and projects

- Reason for revision:
  - This Emergency PRR captures settlements changes associated to fixes for high priority variances and projects.
  - Emergency PRR:
    - This PRR has an effective date of May 1, 2026. This PRR was brought to the September BPM Meeting to initiate discussion with stakeholders. However, the PRR will align with the comment periods for the October/November series of meetings.
    - These changes were implemented on 10/1/2026
- Initial comments received from:
    - Bonnie Blair, Six Cities, October 13, 2026
- Initial comment period expired: October 13, 2026
- Next step: Post ISO recommendation

Impacted Charge Codes *(details here)*
CG CC 5811 DAAS Charges_5.0
CG CC 6460 FMM Instructed Imbalance Energy Settlement_6.0.1
CG CC 6636 IFM Bid Cost Recovery Tier1 Allocation_6.0.1
CG CC 8011 Day Ahead Imbalance Reserve Transfer Revenue Settlement_6.0.2
CG CC 8076 Day Ahead Imbalance Reserve Up Tier 1 Allocation_6.0.3
CG CC 8086 Day Ahead Imbalance Reserve Down Tier 1 Allocation_6.0.3
CG CC 64600 FMM Instructed Imbalance Energy EIM Settlement_6.0.3
CG CC 64700 Real Time Instructed Imbalance Energy EIM Settlement_6.0.2
CG CC 64770 Real Time Imbalance Energy Offset EIM_6.0.1a
CG PC Day Ahead Congestion_6.0.3
CG PC RTM Net Amount_5.38.1
CG PC RTM Net Amount_5.38.5
CG PC RTM Net Amount_6.0.3
CG PC RTM Net Amount_6.1.1

Courtesy Notice: Skipped PRR Numbers

PRR	PRR Title	Stage
1697	This PRR was used for maintenance and testing purposes	N/A
1698	This PRR was used for maintenance and testing purposes	N/A

The PRR numbers listed above were utilized by the IT team for system maintenance and testing purposes. These numbers have been retired and will not be used for future PRR submissions.

REGISTRATION IS OPEN

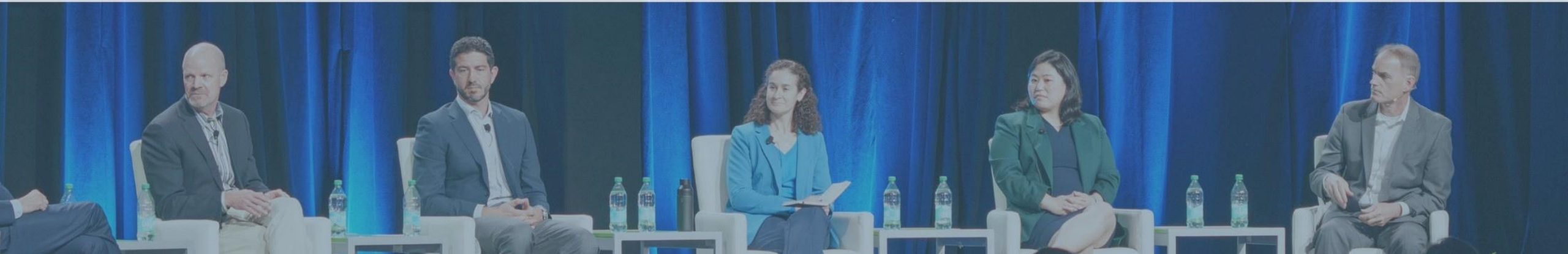
2026 STAKEHOLDER SYMPOSIUM

Welcome reception - Oct. 5
at Kimpton Sawyer Hotel, Sacramento, CA

Symposium program - Oct. 6
SAFE Credit Union Convention Center
Sacramento, CA

Visit: https://www.caiso.com/meetings-events/events/stakeholder-symposium

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Next BPM Change Management Meeting: Nov. 17, 2026, 11:00 AM PT

BPM change management process

The ISO systematic and publicly transparent BPM Change Management process ensures the consideration of all relevant information when modifying BPMs. The change management process uses a system available through the ISO public website that provides a way to propose BPM changes, comment on open change requests, and track proposed change requests. The change management process begins when the ISO or a stakeholder submits a web-based Proposed Revision Request (PRR). After an ISO review for completeness, PRRs are posted to the website, triggering a stakeholder review and comment period.

1. **Submit Proposed Revision Request (PRR)**
2. **Comments period**
   Upon ISO acceptance, PRR becomes public and 10-business day comment period starts
3. **Stakeholder meeting**
   PRR details and comments reviewed and discussed
4. **Recommendation**
   ISO recommendation issued on PRR
5. **Comments on recommendation**
   10-business day comment period open on recommendation
6. **Stakeholder meeting on recommendation**
   PRR recommendation and comments reviewed
7. **Final decision***
   BPM updated or not updated

*Stakeholders have the right to appeal the final decision of a proposed revision request (PRR)

Direct BPM change management process questions to:
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