

Section	BRQ	BRQ detail	Question	CAISO's Response
4.1.1	N/A; Day-Ahead Operating Stressed Hour Assessment Process section	MW supply reserve available for imbalance surplus beyond the BAA's RSE requirement	Suggestion to update: "MW residual supply above the BAA's RSE." It is confusing to have the words "reserve" and "imbalance".	The final proposal paper for EDAM CISO BAA Participation Rules states the net EDAM export transfer constraint governs the potential usages of surplus supply beyond RSE requirements (demand forecast requirement, imbalance reserve requirement, and ancillary service requirement); the amount of supply reserved will be governed by the EDAM reliability margin of the net EDAM export transfer constraint. EIMPR-BRQ-004 further clarifies this as the "MW value that provide allowable surplus to transfer beyond RSE requirement". Thank you for the suggestion for additional clarity, the ISO will provide that as part of EDAM BPM and/or Market Instruments BPM content which are targeting 7/1/25 to start BPM change management process
4.1.1	BRQ-004	Confidence factor (ratio ranging from 0 = no risk, to 1 = maximum risk)	Per CAISO's Pending EDAM ISO BAA Tariff Policy from November 10, 2023, the Confidence Factor (pg. 54) references that the CAISO BAA will utilize a confidence factor of 0% during all system conditions and during stressed conditions, the confidence factor will remain at zero and non-stressed conditions, it will utilize a confidence factor above zero. Thus, the statement should read: " <i>confidence factor</i> (ratio ranging from 0 = maximum risk , to 1 = no risk)"	In the EDAM ISO BAA Tariff Filing for 11/14/23 (see Nov13-2023-TariffAmendment-CAISO-Balancing-Authority-Participation-ExtendedDayAheadMarket-ER24-379.pdf), the advisory note provided on pg. 54 mentions the Confidence Factor for the Net Export Transfer Constraint will be preset to 0% upon inception of EDAM until the market risk was assessed and understood prior to applying higher risk Confidence Factors to the CISO BAA. To clarify this statement, it's useful to describe CF as a multiplier used to manage the risk of delivery in EDAM. Less certainty (e.g. lower risk position) would move CF towards 0% (or 0) and lower the amount of transfer allowed by the Net Export Transfer Constraint (keeping non-RSE eligible supply local to its native BAA). More certainty (i.e. higher risk position) would move CF towards 100% (or 1) and raise the amount of transfer allowed by the Net Export Transfer Constraint (allowing more non-RSE eligible supply to participate in EDAM transfers). Important to also note that the final policy paper provides that "ISO will utilize the BPM [change management] process for any proposed revisions to the confidence factor value setting during non-stressed conditions." This point will be solidified in the forthcoming EDAM BPM.

<p>4.1.1</p>	<p>N/A; Day-Ahead Operating Stressed Hour Assessment Process section</p>	<p>In reference to the CAISO BAA operators providing confidence factor and reliability margin inputs for their own EDAM Export Transfer Constraint.</p>	<p>In the BRS, we would like to see details including where/how the confidence factor and reliability margin as input for the IFM process. We would like to see the CF factor set at 0 for both stressed and non-stressed conditions. Functionality should be built in to allow Operators to adjust the confidence factor in non-stressed conditions (but Operators still should not be able to raise the confidence factor above zero until such a process has been vetted through a BPM change).</p> <p>The reliability margin should be set to zero during non-stressed system conditions and Operators should have the ability to set it higher during stressed system conditions.</p> <p>Before the CF and the hourly RM (Reliability margin) is broadcasted/reported in SIBR, where is the actual constraint in IFM system and how is it built in the system? If CAISO can update the BRQ with a section describing what is to be built.</p>	<p>The EDAM BRS describes the functionality/system requirements for the EDAM Net Export Constraint, as submitted by the CISO BAA System Operators, for the CISO BAA while the CISO BAA Participation Rules BRS provides the business process requirements to support those functional/system changes. The details on how the confidence factor and reliability margin are input to IFM are provided in the EDAM BRS BRQ 13010.</p> <p>CISO BAA confidence factor will be set to 0 for stressed and non-stressed conditions upon inception of EDAM; this is defined in both the final proposal paper for EDAM CISO BAA Participation Rules as well as section 2.4 of the draft Business Practice Summary - Extended Day-Ahead Market published on 7/10/2024.</p> <p>The functionality as described in the EDAM BRS will allow operators to adjust the confidence factor in non-stressed condition. The final policy paper as provides that "The ISO will utilize the BPM [change management process] for any revisions to the confidence factor during non-stressed conditions". This point will be solidified in the forthcoming EDAM BPM.</p> <p>In regards to the reliability margin, the final policy specified the criteria by which the operators will set the reliability margin in both stressed and non-stressed conditions in order to allow the CAISO BAA flexibility in how it utilizes it in varying system conditions. The approved tariff language in 33.31.32 supports that proposal stated that the CAISO may specify a reliability margin to use in accordance with the EDAM BPM. The draft BPM content was published as the Business Practice Summary noted above and aligns to policy and tariff. Additional changes to the criteria are not anticipated and participants can watch for the formally EDAM BPM draft which is targeting 7/1.</p> <p>The CF and RM for CISO BAA will be published via OASIS, please see EDAM BRQ 20156 and the Business Practice Summary - Extended Day-Ahead Market noted above.</p>
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Section	BRQ	BRQ detail	Question	CAISO's Response
4.2.1	BRQ-010	System shall map the relationship between each Transfer System Resource ("Transfer Resource") participating in EDAM and its associated BAA SCID in both the import and export directions.	PG&E would like to clarify who is defining the transfer? Is it the Transmission Owner? Would you please define "Transfer Resource" and provide clarifications the role/owner of the Transfer Resource task.	<p>The EDAM entity is responsible for registering all of the TSRs in their BAA. Paired TSRs must have the same TSR type on each side of transfer. Each TSR can be associated with either transmission customer SC (TCSC) or EDAM entity SC (EESC)</p> <p>Each DA TSR is associated with one of four types:</p> <p>Type 1: Bilateral energy transactions between TCs</p> <ul style="list-style-type: none"> Associate with TCSC: may be the same or different SC for each side of paired TSRs Must have CRN: can be same or different CRN for each side of paired TSRs <ul style="list-style-type: none"> Must also define matching TSR CRN ID RSE eligible <p>Type 2: Capacity from TCs that release their transfer rights on each side of transfer location</p> <ul style="list-style-type: none"> Associate with TCSC: may be the same or different SCs for each side of paired TSRs Not RSE eligible No associated CRN <p>Type 3: RSE-eligible transfer capacity released by EDAM Entities</p> <ul style="list-style-type: none"> Associate with EESC: different SCs for each side of paired TSR Must have RSE eligible flag=Y Both sides of paired TSR must be RSE eligible No associated CRN <p>Type 4: Non-RSE eligible transfer capacity released by EDAM entities</p> <ul style="list-style-type: none"> Associate with EESC: different SCs for each side of paired TSR Must have RSE eligible flag=N No associated CRN

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4.2.2	BRQ-124A	Potential Application(s) Impacted: Settlements, DREAMS	PG&E would like to clarify what is the DREAMS application. Where can we find more information about the DREAMS application and how does it interact with CAISO settlement applications?	DREAMS references an internal Settlements process (external participants will not interface) and the impacted system should be only considered as "Settlements". Apologies for any confusion.
4.4	N/A; Business Process: CISO BAA EDAM Access Charge	2) New and Upgraded Transmission: New or upgraded transmission that applies some or all of the project's incremental transfer capability to exporting transfer resource capacity in EDAM, if shared between the CISO BAA and one or more EDAM BAA	PG&E would like to clarify the language regarding the PTO ratio. If an existing EDAM BAA has a transmission capacity upgrade, will the ratio in the calculation appropriately update following the upgrade?	The ratio would apply according to the PTO's share of that transmission capacity for cost allocation of new upgrades, and would include that portion of the cost being recovered by the PTO when calculating component 2.