





Western Energy Imbalance Market (WEIM) Procedure to set up new Non- Participating Resources and Participating Resources or End Date / Remove Resources

Revision 3

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 California ISO	SC Certification/Maintenance	Template Version No.	3
Western Energy Imbalance Market (WEIM) Procedure to set up new Non-Participating Resources and Participating Resources or End Date / Remove Resources		Revision Date	September 2, 2024
		Distribution - External	WEIM Entity / WEIM SCs / ISO

Version	Date	Updated By	Description
3	12/17/2024	N. Hines	Updated documentation for client clarification and ease of use, added additional information for NPR and PR updates
2.2	3/10/2022	L. Collins	Change order of one step to have WEIM Entity approval notification to be sent AFTER all the prerequisites are completed in order to not have a CIDI case open more than 30 days. Changed EIM to WEIM
2.1	9/28/2021	L. Collins	Adding links for full network model process and steps for SQMD/SLD submittal Adding process steps to remove resources
2	6/23/21	N Hines	Updating formatting, added additional information to clarify process
1		L. Collins	Initial Publication

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1. Purpose

This document describes the processes to complete implementation/onboarding of new Energy Imbalance Market (WEIM) resources.

- New non-participating resource setup
- New participating resource setup
- Convert non-participating resource to participating resource setup
- Convert participating resource to non-participating resource setup
- End dating/removing of a resource

All WEIM resources must complete the model submission and new resource implementation process as outlined in the Modeling Submission checklist. This includes obtaining a project code and completion of the Settlements Quality Meter Data (SQMD), Single Line Drawing (SLD), and Generator Resource Data Template (GRDT) requirements. This document reviews steps required once those requirements from the Modeling Submission checklist on the [New Resource Implementation](#) webpage have been met. Submit these items no later than 40 business days prior. These documentation requirements can be submitted earlier.

When onboarding a new resource or transitioning a non-participating resource to a participating resource, the following will be required:


- 1) Model requirements met (for both reliability and market purposes), including SQMD Plans and GRDT requirements
- 2) Contract requirements: Schedule 1 update or initial submission provided. This is for WEIM Participating Resources only.
- 3) Scheduling Coordinator (SC) letters – provided via the Customer Inquiry Dispute and Information (CIDI) system, and will be used to coordinate association to resource by the Customer Readiness onboarding team

The document linked below outlines the process to submit the ongoing obligations, including documents for WEIM new resource setup and WEIM resource transfers via CIDI: <http://www.caiso.com/Documents/How-to-Submit-Documents-for-Applications-and-Ongoing-Obligations.pdf>.

The information in the following sections is to provide step-by-step instructions and links to the various documents along with who is to perform and complete each step (owner).

First, determine which implementation to process.

- New WEIM Resource Setup
 - Non Participating Resource (section 2)
 - Participating Resource (section 3)
- Conversion of Non Participating Resource to Participating Resource (section 4)

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- Converting participating to non-participating (section 5)
- End Dating/removal of WEIM Resource (section 6)

2. New Non-Participating Resource setup


Audience: WEIM Entity SC

Assumptions/Prerequisites:

- The resource and WEIM entity has submitted for and completed requirements as outlined in the Model Submission Checklist, on the Gen tab it would be rows 3-8. . This includes:
 - [Modeling Submission Checklist](#)
 - The resource submission and identified model implementation to CAISO Full Network Model per Full Network Model Process.
 - Project code created per SCME requirements, and
 - SQMD and SLD need to have been accepted by the ISO
 - For both new resource set up and required updates, the SQMD and SLD must be submitted at least 35 calendar days prior to implementation. This documentation requirement can be submitted earlier.
 - Note: If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and WEIM Entity

Clarifying Dates


- **COD: Commercial Operation Date** is the date after which all testing and commissioning has been completed and is the initial date to which the seller can start producing electricity for sale (i.e. when the project has been substantially completed).
Per the CAISO tariff: The date on which a Generating Unit or project phase at a Generating Facility commences Commercial Operation as agreed to by the applicable Participating TO, the CAISO, and the Interconnection Customer pursuant to Appendix E to the Large Generator Interconnection Agreement, and in accordance with the implementation plan agreed to by the Participating TO and the CAISO for multiple individual Generating Units or project phases at a Generating Facility where an Interconnection Customer intends to establish separate Commercial Operation Dates for those Generating Units or project phases.
- **Effective Date:** For changes made to the resources after implementation, the date the change will start. Example: 1/1/2024 00:00:00.
- **Implementation Date:** for WEIM entities, it is the first trading day for a WEIM entity in the Real-Time market.

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Non Participating Resource Steps:

Any questions regarding this process, please contact SCRequests@caiso.com or submit a CIDI inquiry ticket to Onboarding and Maintenance.

Step	Owner	Action
1.	WEIM Entity SC	<p>See Assumptions and Prerequisites</p> <p>The resource must be modeled with the CAISO in a Full Network Model build. If the resource is not active or in the next upcoming release, this will need to be completed prior to Resource/SC association.</p> <p>The WEIM Entity SC must submit a Settlement Quality Meter Data (SQMD) Plan at least 35 calendar days <i>before</i> implementation. The SQMD must be accepted before processing in step 4 (below). The resource/SC association setup process cannot be started until the SQMD plan is approved by the ISO. This documentation requirements can be submitted earlier.</p>
1.	WEIM Entity SC	<p>Resource/SC Association</p> <p>It is required that the SQMD and SLD be accepted prior to Resource/SC association. When the resource is ready to be associated with the WEIM Entity, the below documents must be submitted via CIDI ticket. The procedure for how to submit this type of CIDI Ticket can be found here.</p> <p>Documents required for resource/SC association are as follows:</p> <ul style="list-style-type: none"> • New SC Acceptance • Resource Owner Letter • WEIM GRDT • Resource Control Agreement • Project code (comment on CIDI ticket or in ticket description) <p>Please note: Effective date is the date the change will be implemented. All dates on the documents must match and be submitted no later than 10 business days <i>prior</i> to the effective date. Documentation can be submitted earlier as long as it is not more than 60 days in advance. Due to CAISO volume, it is possible the CAISO will not be able to review outside of 30 days, but every effort will be made to review at submission.</p>

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Step	Owner	Action
2.	CAISO	Once all the documentation is received, the CAISO will process the request and notify WEIM Entity SC once the setup is complete.
3.	WEIM Entity Access Notes	<p>If access is provisioned at the Scheduling Coordinator (SCID) or Access Control List (ACL) level, the resource will be visible in:</p> <p>Scheduling Infrastructure and Business Rules (SIBR), Base Schedule Aggregation Portal (BSAP), and Outage Management applications the day prior to the effective date.</p> <p>Automated Dispatch System (ADS) and Outage Management System (OMS) will be visible the day before the effective transfer date if the access is provisioned at the Schedule Coordinator ID (SCID) level. If provisioned at the Access control list (ACL) level (sub-grouping), the request cannot be submitted until the effective date. The ACL type of provisioning is typically for third party visibility outside of the SC company.</p>

3. New Participating Resource setup

New resources that are being added (not converting from an existing non-participating resource)

Audience:

1. Participating Resource SC
2. WEIM Entity SC
3. Participating Resource Owner


Important note: *The setup of the fuel region and the Major Maintenance Adder (MMA) are separate from this process. Refer to the Market Instruments Business Practice Manual (BPM) for Fuel Regions and MMA information. The BPM Library is found at:*

<https://bpmcm.caiso.com/Pages/BPMLibrary.aspx>

Also see Additional Information page 16-17.

Assumptions/Prerequisites:

- The resource and WEIM entity has submitted for and completed requirements as outlined in the Model Submission Checklist, on the Gen tab it would be rows 3-8.). This includes:
[Modeling Submission Checklist](#)

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- The resource submission and identified model implementation to CAISO Full Network Model per Full Network Model Process.
- Project code created per SCME requirements, and
- SQMD and SLD need to have been accepted by the ISO
 - Note: If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and WEIM Entity
- Optional: If an additional SCID or BSCID is required, please submit this request prior to resource/SC association via CIDI ticket. The procedure for how to submit this type of CIDI Ticket can be found [here](#).

Additional SCID Procedure:

<http://www.caiso.com/Documents/ExistingSchedulingCoordinatorRequestsAdditionalSCID-Procedure.pdf>


Additional SCID Form:

<http://www.caiso.com/Documents/ExistingSchedulingCoordinatorRequestsAdditionalSCID-LetterTemplate.doc>


New Participating Resource Onboarding Steps:

Any questions regarding this process, please contact SCRequests@caiso.com or submit a CIDI inquiry ticket to Onboarding and Maintenance.

Step	Owner	Action
1.	WEIM Entity SC	<p>See Assumptions and Prerequisites</p> <p>The resource must be modeled with the CAISO in a Full Network Model build. If the resource is not active or in the next upcoming release, this will need to be completed prior to Resource/SC association.</p> <p>The WEIM Entity SC must submit a Settlement Quality Meter Data (SQMD) Plan at least 35 calendar days <i>before</i> implementation. The SQMD must be accepted before processing in step 4 (below). The resource/SC association setup process cannot be started until the SQMD plan is approved by the ISO. This documentation requirement can be submitted earlier.</p>
2.	WEIM Entity SC	<p>Email RegulatoryContracts@caiso.com and ask for a copy of the Schedule 1. Once received from the CAISO, please redline changes (add/remove resource information) and return to Regulatory Contracts.</p>

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Step	Owner	Action		
3.	WEIM Entity SC	<p>Resource/SC Association</p> <p>It is required that the SQMD and SLD be accepted prior to Resource/SC association. When the resource is ready to be associated with the WEIM Entity, the below documents must be submitted via CIDI ticket. The procedure for how to submit this type of CIDI Ticket can be found here.</p> <p>Documents required for resource/SC association are as follows:</p> <ul style="list-style-type: none"> • New SC Acceptance • Resource Owner Letter • WEIM GRDT • Resource Control Agreement • Project code (comment on CIDI ticket or in ticket description) • WEIM Entity notification (comment on CIDI ticket) <p>Sample Wording: This serves as the official notification to the CAISO, as the EIM Market Operator, that [EIM Company Name] Entity has verified that the resources listed below meet all of [EIM Company Name] EIM Entity requirements to participate in the Energy Imbalance Market.</p> <p style="text-align: center;"><i>Resource Name/ Resource ID</i></p> <table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td data-bbox="695 1213 1008 1304">Generic/Internal Name</td> <td data-bbox="1008 1213 1235 1304">Resource_1_AB CD</td> </tr> </table> <p>Please note: Effective date is the date the change will be implemented. All dates on the documents must match and be submitted no later than 10 business days prior to the Effective date. Documentation can be submitted earlier as long as it is not more than 60 days in advance. Due to CAISO volume, it is possible the CAISO will not be able to review outside of 30 days, but every effort will be made to review at submission.</p>	Generic/Internal Name	Resource_1_AB CD
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Step	Owner	Action
4.	CAISO	Once all the documentation is received, the CAISO will process the request and notify WEIM Entity SC once the setup is complete.
5.	WEIM Entity Access Notes	<p>If access is provisioned at the Scheduling Coordinator (SCID) or Access Control List (ACL) level, the resource will be visible in:</p> <p>Scheduling Infrastructure and Business Rules (SIBR), Base Schedule Aggregation Portal (BSAP), and Outage Management applications the day prior to the effective date.</p> <p>Automated Dispatch System (ADS) and Outage Management System (OMS) will be visible the day before the effective transfer date if the access is provisioned at the Schedule Coordinator ID (SCID) level. If provisioned at the Access control list (ACL) level (sub-grouping), the request cannot be submitted until the effective date. The ACL type of provisioning is typically for third party visibility outside of the SC</p>

4. Converting a non-participating resource to a participating resource steps

The process described in this section is for a resource which is already setup as a non-participating resource, but will be “transferred” to the WEIM Participating Resource SC to become a participating resource.

Audience:

1. Participating Resource SC
2. WEIM Entity SC
3. Participating Resource Owner


Important note: *The setup of the fuel region and the Major Maintenance Adder (MMA) are separate from this process. Refer to the Market Instruments Business Practice Manual (BPM) for Fuel Regions and MMA information. The BPM Library is found at:*

<https://bpmcm.caiso.com/Pages/BPMLibrary.aspx>

Also see Additional Information page 16-17.

Assumptions/Prerequisites:

- The resource and WEIM entity has submitted for and completed requirements as outlined in the Model Submission Checklist (items 3-9). This includes:

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[Modeling Submission Checklist](#)

- The resource submission and identified model implementation to CAISO Full Network Model per Full Network Model Process.
- Project code created per SCME requirements, and
- SQMD and SLD need to have been accepted by the ISO
 - Note: If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and WEIM Entity
- Optional: If an additional SCID or BSCID is required, please submit this request prior to resource/SC association via CID ticket. The procedure for how to submit this type of CIDI Ticket can be found [here](#).

Additional SCID Procedure:


<http://www.caiso.com/Documents/ExistingSchedulingCoordinatorRequestsAdditionalSCID-Procedure.pdf>

Additional SCID Form:


<http://www.caiso.com/Documents/ExistingSchedulingCoordinatorRequestsAdditionalSCID-LetterTemplate.doc>

Converting a NPR to a PR Steps:

Step	Owner	Action
1.	WEIM Entity SC	<p>See Assumptions and Prerequisites</p> <p>The resource must be modeled with the CAISO in a Full Network Model build. If the resource is not active or in the next upcoming release, this will need to be completed prior to Resource/SC association.</p> <p>The WEIM Entity SC must submit a Settlement Quality Meter Data (SQMD) Plan at least 35 calendar days <i>before</i> implementation. The SQMD must be accepted before processing in step 4 (below). The resource/SC association setup process cannot be started until the SQMD plan is approved by the ISO. This documentation requirement can be submitted earlier.</p> <p>Please make sure to include the meter interval size with the new SQMD plan.</p>
2.	WEIM Entity SC	<p>Email RegulatoryContracts@caiso.com and ask for a copy of the Schedule 1. In your email, please inform them you are changing the resource to a participating resource. Once received from the CAISO, please redline changes (add/remove resource information) and return to Regulatory Contracts.</p>

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3.	WEIM Entity SC	<p>Resource/SC Association</p> <p>It is required that the SQMD and SLD be accepted prior to Resource/SC association. When the resource is ready to be associated with the WEIM Entity, the below documents must be submitted via CIDI ticket. The procedure for how to submit this type of CIDI Ticket can be found here. Documents required for resource/SC association are as follows:</p> <ul style="list-style-type: none"> • New SC Acceptance Letter • Resource Owner Letter • WEIM GRDT Note the cell for WEIM Participating should be marked 'Y'. • Resource Control Agreement • Relinquishing SC Letter • New Project code (comment on CIDI ticket or in ticket description) • WEIM Entity notification (comment on CIDI ticket) <p>Sample Wording: This serves as the official notification to the CAISO, as the EIM Market Operator, that [EIM Company Name] Entity has verified that the resources listed below meet all of [EIM Company Name] EIM Entity requirements to participate in the Energy Imbalance Market.</p> <p style="text-align: center;"><i>Resource Name/ Resource ID</i></p> <table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td style="padding: 5px;">Generic/Internal Name</td> <td style="padding: 5px;">Resource_1_AB CD</td> </tr> </table> <p>Please note: Effective date is the date the change will be implemented. All dates on the documents must match and be submitted no later than 10 business days prior to the effective date. Documentation can be submitted earlier as long as it is not more than 30 days in advance.</p>	Generic/Internal Name	Resource_1_AB CD
Generic/Internal Name	Resource_1_AB CD			
4.	CAISO	Once all the documentation is received, the CAISO will process the request and notify WEIM Entity SC once the setup is complete.		
5.	WEIM Entity Access Notes	<p>If access is provisioned at the Scheduling Coordinator (SCID) or Access Control List (ACL) level, the resource will be visible in:</p> <p>Scheduling Infrastructure and Business Rules (SIBR), Base Schedule Aggregation Portal (BSAP), and Outage Management applications the day prior to the effective date.</p> <p>Automated Dispatch System (ADS) and Outage Management System (OMS) will be visible the day before the effective transfer date for if the</p>		

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		access is provisioned at the Schedule Coordinator ID (SCID) level. If provisioned at the Access control list (ACL) level (sub-grouping), the request cannot be submitted until the effective date. The ACL type of provisioning is typically for third party visibility outside of the SC.
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5. Converting a Participating Resource to a Non-Participating Resource

The process described in this section is for a resource which is already setup as a participating resource, but will be “transferred” to the WEIM Non-Participating Resource SC to become a non-participating resource.

Audience:

1. Participating Resource SC
2. WEIM Entity SC
3. Participating Resource Owner

Also see Additional Information page 16-17.

Assumptions/Prerequisites:


- The resource and WEIM entity has submitted for and completed requirements as outlined in the Model Submission Checklist (items 3-9). This includes:
 - [Modeling Submission Checklist](#)
 - The resource submission and identified model implementation to CAISO Full Network Model per Full Network Model Process.
 - Project code created per SCME requirements, and
 - SQMD and SLD need to have been accepted by the ISO
 - Note: If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and WEIM Entity
- Optional: If an additional SCID or BSCID is required, please submit this request prior to resource/SC association via CID ticket. The procedure for how to submit this type of CIDI Ticket can be found [here](#).

Additional SCID Procedure:


<http://www.aiso.com/Documents/ExistingSchedulingCoordinatorRequestsAdditionalSCID-Procedure.pdf>

Additional SCID Form:

<http://www.aiso.com/Documents/ExistingSchedulingCoordinatorRequestsAdditionalSCID-LetterTemplate.doc>

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Step	Owner	Action
1.	WEIM Entity SC	<p>See Assumptions and Prerequisites</p> <p>The resource must be modeled with the CAISO in a Full Network Model build. If the resource is not active or in the next upcoming release, this will need to be completed prior to Resource/SC association.</p> <p>The WEIM Entity SC must submit a Settlement Quality Meter Data (SQMD) Plan at least 35 calendar days <i>before</i> implementation. The SQMD must be accepted before processing in step 4 (below). The resource/SC association setup process cannot be started until the SQMD plan is approved by the ISO. This documentation requirement can be submitted earlier.</p>
2.	WEIM Entity SC	<p>Resource/SC Association</p> <p>It is required that the SQMD and SLD be accepted prior to Resource/SC association. When the resource is ready to be associated with the WEIM Entity, the below documents must be submitted via CIDI ticket. The procedure for how to submit this type of CIDI Ticket can be found here.</p> <p>Documents required for resource/SC association are as follows:</p> <ul style="list-style-type: none"> • New SC Acceptance • Resource Owner Letter • WEIM GRDT Note the cell for WEIM Participating should be marked 'N' • Resource Control Agreement • Relinquishing SC Letter • Project code (comment on CIDI ticket or in ticket description) <p>Please note: Effective date is the date the change will be implemented. All dates on the documents must match and be submitted no later than 10 business days <i>prior</i> to the effective date. Documentation can be submitted earlier as long as it is not more than 60 days in advance. Due to CAISO volume, it is possible the CAISO will not be able to review outside of 30 days, but every effort will be made to review at submission.</p>

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Step	Owner	Action
3.	CAISO	Once all the documentation is received, the CAISO will process the request and notify WEIM Entity SC once the setup is complete.
4.	WEIM Entity Access Notes	<p>If access is provisioned at the Scheduling Coordinator (SCID) or Access Control List (ACL) level, the resource will be visible in:</p> <p>Scheduling Infrastructure and Business Rules (SIBR), Base Schedule Aggregation Portal (BSAP), and Outage Management applications the day prior to the effective date.</p> <p>Automated Dispatch System (ADS) and Outage Management System (OMS) will be visible the day before the effective transfer date for if the access is provisioned at the Schedule Coordinator ID (SCID) level. If provisioned at the Access control list (ACL) level (sub-grouping), the request cannot be submitted until the effective date. The ACL type of provisioning is typically for third party visibility outside of the SC.</p>

6. End dating / removing a non-participating resource or a participating resource steps

This resource is being end dated in master file and removed from the model due to the resource being retired

Audience:


1. Participating Resource SC
2. WEIM Entity SC
3. Participating Resource Owner

Assumptions/Prerequisites:

- The WEIM entity will need to submit changes to remove the resource from ISO FNM following guidelines provided in the Modeling Submission Checklist.
- If a participating resource, this resource also needs to be removed from the Schedule 1 (steps outlined below).

Removing a Participating or Non-Participating Resource Steps:

Step	Owner	Action
1.	WEIM Entity SC	Email RegulatoryContracts@caiso.com and ask for a copy of the Schedule 1. In your email, please inform them you are removing resource form the schedule 1. Once received from the CAISO, please

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		redline changes remove resource information and return to Regulatory Contracts.
2.	WEIM Entity SC	<p>Resource/SC Disassociation</p> <p>The below documents must be submitted via CIDI ticket. The procedure for how to submit this type of CIDI Ticket can be found here. Documents required for resource/SC disassociation are as follows:</p> <ul style="list-style-type: none"> • Resource Owner Letter • Relinquishing SC Letter <p>Please note: Effective date is the date the change will be implemented. All dates on the documents must match and be submitted no later than 10 business days prior to the effective date. Documentation can be submitted earlier as long as it is not more than 60 days in advance. Due to CAISO volume, it is possible the CAISO will not be able to review outside of 30 days, but every effort will be made to review at submission.</p>
3.	CAISO	Once all the documentation is received, the CAISO will process the request and notify WEIM Entity SC once the setup is complete.

7. Additional Information and Resources


For any changes not listed in this document for WEIM participating and non-participating resources, please submit a CIDI ticket. If the resource changes are minor and only updates for GRDT, please submit the updated GRDT to the masterfile user interface.

For Participating Resources

The setup of the fuel region and the Major Maintenance Adder (MMA) are separate from this process.

Refer to the Market Instruments Business Practice Manual (BPM) for Fuel Regions and MMA information. The BPM Library is found at: <https://bpmcm.caiso.com/Pages/BPMLibrary.aspx>

- **Requesting Fuel Region – Attachment C**
Scheduling Coordinators for WEIM Participating Resources can submit a request through the CIDI system to change the fuel region associated for the resource using the subject “Assign resource to fuel region”.
- **Requesting MMA – Attachment L**
The template should be submitted as an attachment to a CIDI ticket with Case Record Type “Negotiated Rate Application” and Application Type “MMA”.

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Resource modeling information for both non-participating and participating

- If the resource is wind or solar the forecast data will need to be provided by the WEIM Entity, which will require an arrangement between the resource and the WEIM Entity
- The resource has a project code for submittal of SQMD and SLD
- Project Details form - <http://www.caiso.com/Documents/ProjectDetailsForm.docx>
- Select Project Type - SC Metered Entity
- SQMD and SLD have been accepted by the ISO
 - 5750 Settlement Quality Meter Data (SQMD) Plan
 - Submission and Approval Process- <http://www.caiso.com/Documents/5750.pdf>
 - SQMD Plan Template tutorial - <http://www.caiso.com/Documents/SQMDResourceTemplateTutorial.pdf>
- SQMD Plan Template - <http://www.caiso.com/Documents/SQMDPlanTemplate.docx>
- Checklist – Single and Three Line Drawing (SLD) Requirements - <http://www.caiso.com/Documents/Checklist-MeteringAndRIGDrawingRequirements.pdf>
- WEIM GRDT <http://www.caiso.com/Documents/EnergyImbalanceMarketGeneratorResourceDataTemplate.xls>