



Business Requirements Specification

EDAM Enhancements 2026

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Revision History

Date	Version	Description
6/17/2026	0.6	Publish external BRS for the first two high priority enhancements, Inter-SC trading and ADS provision, support market Simulation timeline

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1 Introduction

1.1 Purpose

The **EDAM Enhancement 2026 initiative** will build on the Extended Day-Ahead Market (EDAM) and Day-Ahead Market Enhancements (DAME) by:

1. Addressing high-priority gaps in trading and scheduling market capabilities
2. Providing equitable data visibility and reporting for EDAM entities
3. Adding automation to day-ahead processes to reduce manual effort and improve collaboration with EDAM entities

The benefits of this project include increased satisfaction among EDAM entities and the ability to continue expanding market participation without overburdening operations teams.

Specifically, this initiative will prepare the ISO for the 2026 EDAM implementation of Portland General Electric (PGE). This effort will run in parallel with PGE’s onboarding and will leverage the same market simulation and parallel operations where appropriate.

1.2 Scope

The scope of EDAM Enhancements 2026 includes multiple items, with development prioritized accordingly. External Business Requirements Specifications (BRS) will support ongoing development and align with the market simulation timeline.

This version covers the first two items, while future BRS documents will address the remaining scope.

Table1 Scope for EDAM Enhancements 2026

Priority	Scope Item	Description
1	Inter-SC Trades and Associated CMRI Reports	Enable inter-Scheduling Coordinator (SC) energy trading within EDAM and WEIM BAAs. Add IST final trade reporting from SIBR to CMRI for EDAM entity UI and API access.
2	Automated Provisioning of ADS Dispatch Information to EDAM Entities	Introduce a new role allowing both EDAM and WEIM entities to view all resource dispatches within their BAA through ADS.
—	Coming	Additional scope items will be defined in future BRS releases.

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2 Intellectual Property Ownership

2.1 Checklist

Intellectual Property covers a broad array of information and materials, including written works, computer programs, software, business manuals, processes, symbols, logos, and other work products. Determining ownership of Intellectual Property is very important in preserving the rights of the ISO, and helps to avoid Intellectual Property infringement issues.

All information in this document is the Intellectual Property (copyright, trademark, patent, and/or trade secret) of the California ISO.

3 Details of Business Need/Problem

3.1 Description

Business Opportunity/Problem Statement:	
What:	<ul style="list-style-type: none"> • Added trading and scheduling features remove barriers to market participation <ul style="list-style-type: none"> ○ Inter-SC Trade functionality & CMRI reports • Provide equitable access to data for EDAM Entities <ul style="list-style-type: none"> ○ Automatic provisioning of ADS dispatch information to EDAM Entity <p>Additional scope items will be defined in future BRS releases.</p>
Why do we have this opportunity/problem:	<i>Implement approved tariff amendment, meet EDAM entity request, increase satisfaction of EDAM entities and promote continued market participation. This project will also prepare the ISO for the 2026 EDAM implementation of Portland General Electric (PGE)</i>

4 Project Information

4.1 Business Practice Manuals (BPM)

BPM	Description of Impact(s)
Market Instruments	<i>New CMRI reports for Inter-SC trade</i>
Settlements and Billing	Yes, Inter-SC
Energy Imbalance Market	<i>Yes, Inter-SC trade in WEIM BAA</i>
Extended Day Ahead Market	<i>Yes, Inter-SC trade in EDAM BAA</i>

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4.2 Other

Impact	Description (optional)
Market Simulation	Yes
Market Participant Impact	<i>EDAM entities, WEIM Entities</i>
Customer Readiness Impact	
<ul style="list-style-type: none"> • External Training 	Yes

5 Business Requirements

5.1 Business Process: Inter-SC Trading – Priority 1

All BRQs in this section related to Inter-SC Trading (IST) have been moved out of the EDAM Implementation BRS and into the EDAM Enhancements 2026 BRS for planning, tracking, and execution purposes under this project. Development and testing will be required for these BRQs and will be managed within the EDAM Enhancements 2026 scope.

5.1.1 Business Requirements

ID#	Business Feature	Requirement Type	Potential Application(s) Impacted
EDAM-IST-BRQ-02280	<p>Define Trading Hubs and resource association for EDAM and WEIM BAAs For each EDAM BAA or WEIM BAA Define the one or more Trading Hubs</p> <ul style="list-style-type: none"> • For CISO, keep existing two Trading Hubs • For EDAM BAA, allow EDAM entity to request one or more trading hubs, if the BAA only have one Trading hub, define trading hub on the DGAP. • For EDAM BAA, allow EDAM entity to request trading location to be defined by Master File based up on specific supply resources. 	Process	Master File Transfer Script

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	<ul style="list-style-type: none"> • For the BAA is in both the EDAM and WEIM, the same Trading hubs are applicable for EDAM and WEIM. • For the BAA is in WEIM only, define the trading hub include Participating resource and Non-participating resources, same as for DGAP. • the Generating resource in each EDAM or WEIM BAA must be associated with one and only one Trading Hub 		
EDAM-IST-BRQ-02280b	<p>EDAM and WEIM Entities Submit Trading Hub Distribution Factors to the Master File</p> <ul style="list-style-type: none"> • EDAM and WEIM entities shall submit Generation Distribution Factors (GDFs) through CIDI for the Trading Hubs defined within the entity's associated BAAs. • An EDAM entity may submit either: <ul style="list-style-type: none"> ○ Separate On-Peak and Off-Peak GDF sets for each Trading Hub, or ○ A single GDF set applicable to both On-Peak and Off-Peak periods. • The On-Peak and Off-Peak definitions shall align with the definitions used for the CAISO BAA. 	External Entity Business Process	CIDI Master File
EDAM-IST-BRQ-02280c	<p>Master File Sets Default GDF for Trading Hubs Using Entities Submitted Values if available</p> <ul style="list-style-type: none"> • The Master File (MF) shall associate the GDFs submitted by EDAM and WEIM entities with the corresponding Trading Hubs (THs) as the default GDFs, whether provided as On-Peak and Off-Peak sets or as a single set. • Previously submitted GDFs shall remain in effect if no updated GDF is submitted 	Business Process	Master File

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	<p>for the next update period defined by CAISO.</p> <ul style="list-style-type: none"> ○ Default GDF for TH is only updated based on time defined by CAISO, using entity latest submitted values ● If an EDAM or WEIM entity does not submit GDFs for a Trading Hub, the MF shall calculate the default GDFs based on Pmax values. ● The MF shall pass the Trading Hub and associated GDFs to downstream systems using the existing process. 		
EDAM-IST-BRQ-11400	<p>SIBR identify the registered resource registered Trading Hub and registered load aggregated points as valid trading location For EDAM and WEIM footprint:</p> <ul style="list-style-type: none"> ● Receive Master File defined <ul style="list-style-type: none"> ○ Registered Resources, ○ Registered Trading Hubs ○ Registered load aggregation points <p>List the above as valid trade locations</p>	Core	SIBR (MF)
EDAM-IST-BRQ-11410	<p>Allow registered SC to submit the inter-SC trade</p> <p>The submit SC must be specified in the submitted trade</p> <ul style="list-style-type: none"> ○ The SC can be any registered SC, but not as NPM SC 	Core	SIBR
EDAM-IST-BRQ-11420	<p>Allow SC to submit inter-SC trades at valid location</p> <p>Valid Inter SC trade location include locations in CISO, EDAM/WEIM and WEIM BAA</p> <ul style="list-style-type: none"> ● List of resource locations for PHY 	Existing	SIBR

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	<ul style="list-style-type: none"> • Trading hubs (APN) • Aggregation points (APN) 		
EDAM-IST-BRQ-11430	<p>Continue support All type of inter-SC trading for CISO BAA</p> <p>If SC submitted trade with the trade location is in the CISO BAA, all trade types are valid:</p> <ul style="list-style-type: none"> • Regulation Down • Spinning Reserve • UCT • Regulation Up • APN Energy • CPT Energy • Non-Spinning reserve • PHY Energy 	Existing	SIBR
EDAM-IST-BRQ-11440	<p>Only allow inter-SC trading for Energy (IST) for the EDAM and WEIM BAA outside of CISO</p> <p>If SC submitted trade with the trade location is outside of CISO, in EDAM or WEIM BAA</p> <ul style="list-style-type: none"> • Only energy trades are valid <ul style="list-style-type: none"> ○ APN Energy ○ CPT Energy ○ PHY Energy • Any AST and UCT trades outside of CISO are invalid <p>SC can cancel the IST before the relevant market close</p>	Core	SIBR
EDAM-IST-BRQ-11450	<p>For PHY energy trade in DAM, the trade location must be a registered generator resource</p> <ul style="list-style-type: none"> • The resource must be a MF registered generator resource in EDAM BAAs, <p>Note: Include all type of generator, NGR, such as Gen/AG, MSG, NGR-LESR, NGR-DDR, VER,</p>	Existing	SIBR

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	Hydro, pump, PDR, Hybrid, co-located. Res with CNR, distributed DERA All internal resources are participating EDAM market.		
EDAM-IST-BRQ-11460	<p>For PHY energy trade in RTM, the trade location must be a registered generator resource that participating WEIM</p> <ul style="list-style-type: none"> Only the participating resource can be the location of the IST trade. <p>Trade validation look for Bid, if no bid, the trade is invalid. Since non-participating resource have no bid, the trade is invalid at non-participating resource</p>	Core	SIBR
EDAM-IST-BRQ-11470	<p>The system resource and virtual resource shall not be trade location</p> <p>All the system resource shall not be trade location:</p> <ul style="list-style-type: none"> System resources, intertie resource import/export Transfer resource (TSR, ETSR) Mirror resource Virtual resource <p>Only populate Gen and NGR from MF for PHY trade</p>	Core	SIBR
EDAM-IST-BRQ-11480	<p>No change Inter-SC trade timeline</p> <ul style="list-style-type: none"> The configurable DAM Trade Post Close Time must be initialized to 1 hour after DAM Market Close Time <p>The configurable RTM Trade Post Close Time must be at T-45 after RTM Market Close Time</p> <p>Trade Cyclic Validation occurs after Trade Pre-Market-Close Time every 20 minutes till Trade Market Close Time. The last run has to occur immediately after Trade Close Time</p>	Existing	SIBR
EDAM-IST-BRQ-11490	<p>Existing IST pre-market validates rules apply to IST in EDAM and WEIM</p> <p>All existing SIBR rules for IST apply to EDAM WEIM IST</p>	Existing	SIBR

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	<p>Including:</p> <ul style="list-style-type: none"> • IST PHY trade must not be greater than the registered Maximum Capacity for any Online Generating Resource • Inter-SC Trade (IST) Matching paired trades with From and To SC, if no match, send warning message to both SCs. • Inter-SC PHY Trade Cyclic Market Validation: If IST PHY trades exceed resource limit of higher of energy bid and Operating limit minus the validated trades, Pro-rata the IST trades accordingly. Validated Trade Quantity will be set to their reduced quantity <ul style="list-style-type: none"> ○ validated Trade Quantity will be set to Submitted Trade Quantity ○ notify all SCs involved in these PHYs about the reason for the adjustments <p>Trades that pass Cyclic Market Validation must become Conditionally Valid Trades</p>		
EDAM-IST-BRQ-11500	<p>Existing IST Market Close Validation apply to IST in EDAM and WEIM</p> <p>All Matched Trades of Trade Category APN must become Valid IST Trades. Unmatched and Conditionally Invalid IST Trades must become Invalid IST Trades</p> <p>All Trades of IST Trade Type, of Category PHY that are of status Conditionally Valid or Conditionally Modified and that pass the Trade Post Close Validation will be promoted to Valid or Modified Trades.</p>	Existing	SIBR
EDAM-IST-BRQ-11510	<p>Existing IST post-market validates rules apply to IST in EDAM and WEIM</p> <p>For all IST Trades of Trade Category PHY</p> <ul style="list-style-type: none"> • if the sum of all Submitted Trade Quantities of the PHYs which share the Trading Location is greater than the Day Ahead Energy Schedule of the Trade Location Generator for the Trade Period of the Trade, these PHYs will be reduced 	Existing	SIBR

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	<p>pro-rata according to their Submitted Trade Quantity</p> <ul style="list-style-type: none"> if the sum of all Submitted Trade Quantities of the Real Time PHYs which share the Trading Location is greater than the difference of the HASP Energy Schedule awarded to the Trade Location Generator for the Trade Period of the PHY, and the sum of the Validated Trade Quantities of the Valid and Modified Day Ahead PHYs whose Depend On Name points to the Generating Resource that is the specified Trading Location of the Real Time Trades, these Real Time PHYs will be reduced pro-rata according to their Submitted Trade Quantity 		
EDAM-IST-BRQ-11520	<p>Generated CPT for the difference of PHY trade validated and DAM schedule</p> <ul style="list-style-type: none"> Generate an IST Trade of Trade Category CPT with the Trade Quantity set to the difference between the Validated Trade Quantity and the Day Ahead Energy Schedule of the Trade Location Generator for the Trade Period of the Trade, CPT Trade Location set to the corresponding registered Trading Hub of the Trade Location Generator of EDAM BAA <p>the system shall notify all SCs involved in these PHYs about the generation of CPTs</p>	Existing	SIBR
EDAM-IST-BRQ-11530	<p>Generated CPT for the difference of PHY trade validated and HASP (FMM advisory) schedule</p> <ul style="list-style-type: none"> Generate an IST Trade of Trade Category CPT with the Trade Quantity set to the difference between the Validated Trade Quantity and the HASP Energy Schedule of the Trade Location Generator for the Trade Period of the Trade, CPT Trade Location set to the corresponding registered Trading Hub of the Trade Location Generator of EDAM/WEIM BAA 	Existing	SIBR

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ID#	Business Feature	Requirement Type	Potential Application(s) Impacted
	the system shall notify all SCs involved in these PHYs about the generation of CPTs		
EDAM-IST-BRQ-19540	Day-ahead Inter-SC Trade Settlement <ul style="list-style-type: none"> • Settlement for From SC as product of the IST DA quality from SC and trade location LMP • Settlement for To SC as product of (-1) *the IST DA quality To SC and trade location LMP Note: CC6301	Existing	Settlement
EDAM-IST-BRQ-19550	FMM Inter-SC Trade Settlement <ul style="list-style-type: none"> • Settlement for From SC as product of the IST hourly quality from SC and trade location average FMM LMP • Settlement for To SC as product of (-1) *the IST hourly quality To SC and trade location average FMM LMP Note: CC6371	Existing	Settlement
EDAM-IST-BRQ-20510	Receive SIBR Inter-SC trade final Trade set CMRI shall receive the Inter-SC Trade (IST) data from SIBR when the DAM and RTM published final trades	Core	CMRI (SIBR)
EDAM-IST-BRQ-20520	Receive MF defined Resources and Trading Hubs association Receive Master File defined trading Hubs and resource association for the EDAM and WEIM BAAs	Core	CMRI (MF)
EDAM-IST-BRQ-20522	Receive MF defined resource, TH, LAP and associated BAA <ul style="list-style-type: none"> • Registered Generator • Registered Trading Hubs (Aggregated Pnode) • Registered load aggregation points (Aggregated Pnode) • Association with BAAs for above resources, Apnodes Note: List the above as valid trade locations	Core	CMRI (MF)

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EDAM-IST-BRQ-20530	<p>Associate Trading location with BAA and EDAM entity, access control for viewing reports.</p> <ul style="list-style-type: none"> • Associate following trading location to the BAA <ul style="list-style-type: none"> ○ Registered Generator ○ Registered Trading Hubs (Aggregated Pnode) ○ Registered load aggregation points (Aggregated Pnode) • Associate BAA with EDAM entity • Allow EDAM entity view IST trades in their corresponding BAA. • Allow EDAM entity to retrieve IST trades through B2B APIs 	Core	CMRI AIM
EDAM-IST-BRQ-20540	<p>New CMRI Report IST trades by BAA for the EDAM entity, with access available via UI and B2B API</p> <ul style="list-style-type: none"> • Report and display for DAM, RTM: <ul style="list-style-type: none"> ○ Name ○ Market Type ○ Trade Date ○ Hour ending ○ Trade Quantity (this is FmSC) ○ Trade Type (IST) ○ Trade Product Type (APN,CPT, PHY) ○ From SC (Scheduling Coordinator) ○ To SC (Scheduling Coordinator) • The UI must support interactive filtering and drill-down capabilities. • The IST trade report must be retrievable via B2B API. 	Core	CMRI

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5.2 Business Process: Data Access: ADS view for EDAM and WEIM Entities

5.2.1 Business Requirements

- New role so that both EDAM and WEIM Entities can view all resource dispatches within their BAA on ADS

ID#	Business Feature	Requirement Type	Potential Application(s) Impacted
EDAM-BRQ-21025	<p>Develop new role so that both EDAM and WEIM Entities can view all resource dispatches within their BAA on ADS</p> <ul style="list-style-type: none"> • Both ADS API and UI need to respect this role, EDAM and WEIM entities view all resource dispatches within their BAA 	Core	AIM ADS