



EDAM Enhancements 2026: Business Requirements Specification

Document Version: 1.0

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
8/13/2026	1.0	Publish external BRS for 14 EDAM enhancements

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Document Purpose

The purpose of this document is to capture and record a description of what the Users and Business Stakeholders of the project wish to obtain, by providing high requirements to capture business needs, important functions, validations, and additional planning relevant information that are key inputs for the subsequent project design phase. This document establishes the basis for the agreement between the initiators and implementers of the project. The information in this document serves as input to determine the scope of projects and all Business Process Modeling efforts. Business requirements are what must be delivered to provide value for the Users and Business Stakeholders. Functions, systems, software, and processes are the ways (how) to deliver, satisfy, or meet the business requirements (what).

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.

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.

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.
3.1	Entity RTUC Advisory Schedule Report in CMRI	Enhance the existing Real-Time Unit Commitment (RTUC) Advisory Schedules Report to EDAM/WEIM Entity
3.2	Capacity Range Report in CMRI	CMRI report Capacity ranges from MQS for SC shadow settlements

Priority	Scope Item	Description
4	Transfer Location to ITC Mapping in ITS from MF	Include tie and transfer resources not scheduled at the scheduling point in the ITC limit calculation by using the Tie-to-ITC mapping and transfer location to ITC mapping
5	Provide EDAM Entities access to report of day ahead results in BAAOP	Enable EDAM entities to access the set of DAM User Interfaces in BAAOP
6	Multiple GHG areas GHG functionality	Testing and implementation of functionality to meet 2027 WA GHG requirements, area base load
7	Manage AS bids for EDAM in RTM	Allow EDAM resource to submit AS self-provision bid in SIBR in RTM
8	EDAM Entity DAM Data Access: TSR Visibility in SIBR	Provide Service for External Entity to retrieve TSR schedule and type
9	SIBR RSE Capacity Report future dates	Enhance report resource advisory max bid capacity of CAISO and EDAM entities for D+1 through D+7
12	OASIS transmission interface usage report for TSR/ETSR and IR/RC	Have TSR/ETSR schedules included with SR net energy schedules (existing) in the Transmission Interface Usage report and Current Transmission Usage on OASIS Update UI Transmission Interface Usage include IR/RC contributions
13	TCORs/ITCs in PLC	EDAM Entity Visibility and Management of TCOR/ITC Data in PLC
14.1	Access Registered System resources in Master File (MF)	API that enables entities to retrieve registered system resource operational data
—	Coming	Additional scope items will be defined in future BRS releases.

Priority 1-Inter-SC trades and associated CMRI reports

BRQs

EDAME26-BRQ-4 Define Trading Hubs and resource association for EDAM and WEIM

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

- 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
- 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

Requirement Type	Process
Application(s)	MasterFile

EDAME26-BRQ-106 EDAM and WEIM Entities Submit Trading Hub Distribution Factors to the Master File

EDAM and WEIM Entities Submit Trading Hub Distribution Factors to the Master File

- 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:
 - 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

Requirement Type	Process
Application(s)	MasterFile

EDAME26-BRQ-107 Master File Sets Default GDF for Trading Hubs Using Entities Submitted Values if available

Master File Sets Default GDF for Trading Hubs Using Entities Submitted Values if available

- 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 for the next update period defined by CAISO
- 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

Requirement Type	Process
Application(s)	MasterFile

EDAME26-BRQ-5 SIBR identify the Registered Resource, Trading hub and registered load aggregated point as valid trading location

SIBR identify the Registered resource, Trading hub and registered load aggregated point as valid trading location

For EDAM and WEIM footprint:

- Receive Master File defined
 - Registered Resources
 - Registered Trading Hubs
 - Registered load aggregation points

List the above as valid trade locations

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-6 Allow registered SC to submit the inter-SC trade

Allow registered SC to submit the inter-SC trade

The submit SC must be specified in the submitted trade

- The SC can be any registered SC, but not as NPM SC

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-7 Allow SC to submit inter-SC trades at valid location

Allow SC to submit inter-SC trades at valid location

Valid Inter SC trade location include locations in CISO, EDAM/WEIM and WEIM BAA

- List of resource locations for PHY
- Trading hubs (APN)
- Aggregation points (APN)

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-8 Continue support All type of inter-SC trading for CISO BAA

Continue support All type of inter-SC trading for CISO BAA

If SC submitted trade with the trade location is in the CISO BAA, all trade types are valid:

- Regulation Down
- Spinning Reserve
- UCT
- Regulation Up
- APN Energy
- CPT Energy
- Non-Spinning reserve
- PHY Energy

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-9 Only allow inter-SC trading for Energy (IST) for the EDAM and WEIM BAA outside of CISO

If SC submitted trade with the trade location is outside of CISO, in EDAM or WEIM BAA

- Only energy trades are valid
 - APN Energy
 - CPT Energy
 - PHY Energy
- Any AST and UCT trades outside of CISO are invalid
- SC can cancel the IST before the relevant market close

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-10 For PHY energy trade in DAM, the trade location must be a registered generator resource

For PHY energy trade in DAM, the trade location must be a registered generator resource

The resource must be a MF registered generator resource in EDAM BAAs,

Note: Include all type of generator, NGR, such as Gen/AG, MSG, NGR-LESR, NGR-DDR, VER, Hydro, pump, PDR, Hybrid, co-located. Res with CNR, distributed DERA

All internal resources are participating EDAM market.

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-11 For PHY energy trade in RTM, the trade location must be a registered generator resource that participating WEIM

For PHY energy trade in RTM, the trade location must be a registered generator resource that participating WEIM

Only the participating resource can be the location of the IST trade.

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

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-12 The system resource and virtual resource shall not be trade location

The system resource and virtual resource shall not be trading location

All the system resource shall not be trading location:

- System resources, intertie resource import/export
- Transfer resource (TSR, ETSR)
- Mirror resource
- Virtual resources

Only populate Gen and NGR from MF for PHY trade

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-13 No change Inter-SC trade timeline

No change Inter-SC trade timeline

- The configurable DAM Trade Post Close Time must be initialized 1 hour after DAM Market Close Time

The configurable RTM Trade Post Close Time must be at T-45 after RTM Market Close Time
Trade Cyclic Validation occurs after Trade Pre-Market-Close Time every 20 minutes till Trade Market Close Time. The last run must occur immediately after Trade Close Time

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-14 Existing IST pre-market validate rules apply to IST in EDAM and WEIM

Existing IST pre-market validate rules apply to IST in EDAM and WEIM

All existing SIBR rules for IST apply to EDAM WEIM IST

Including:

- 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
 - validated Trade Quantity will be set to Submitted Trade Quantity
 - notify all SCs involved in these PHYs about the reason for the adjustments

Trades that pass Cyclic Market Validation must become Conditionally Valid Trades

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-15 Existing IST Market Close Validation apply to IST in EDAM and WEIM

Existing IST Market Close Validation apply to IST in EDAM and WEIM

All Matched Trades of Trade Category APN must become Valid IST Trades. Unmatched and Conditionally Invalid IST Trades must become Invalid IST Trades

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.

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-16 Existing IST post-market validate rules apply to IST in EDAM and WEIM

Existing IST post-market validate rules apply to IST in EDAM and WEIM

For all IST Trades of Trade Category PHY

- 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 pro-rata according to their Submitted Trade Quantity

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

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-17 Generated CPT for the difference of PHY trade validated and DAM schedule

Generated CPT for the difference of PHY trade validated and DAM schedule

- 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

the system shall notify all SCs involved in these PHYs about the generation of CPTs
Generated CPT for the difference of PHY trade validated and DAM schedule

- 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

the system shall notify all SCs involved in these PHYs about the generation of CPTs

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-18 Generated CPT for the difference of PHY trade validated and HASP (FMM advisory) schedule

Generated CPT for the difference of PHY trade validated and HASP (FMM advisory) schedule

- 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

the system shall notify all SCs involved in these PHYs about the generation of CPTs

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-19 Day-ahead Inter-SC Trade SettlementSettlement for From SC as product of the IST DA quality from SC and trade location LMP

Day-ahead Inter-SC Trade Settlement

- 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

Requirement Type	Existing
Application(s)	Settlements

EDAME26-BRQ-20 FMM Inter-SC Trade Settlement

FMM Inter-SC Trade Settlement

- 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

Requirement Type	Existing
Application(s)	Settlements

EDAME26-BRQ-21 Receive SIBR Inter-SC trade final Trade set in CMRI

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

Requirement Type	Core
Application(s)	CMRI

EDAME26-BRQ-22 Receive MF defined Resources and Trading Hubs association

Receive Master File defined trading Hubs and resource association for the EDAM and WEIM BAAs

Requirement Type	Core
Application(s)	CMRI

EDAME26-BRQ-23 Receive MF defined resource, TH, LAP and associated BAA

Receive MF defined resource, TH, LAP and associated BAA

- 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

Requirement Type	Core
Application(s)	CMRI

EDAME26-BRQ-24 Associate Trading location with BAA and EDAM entity, access control for viewing reports.

Associate Trading location with BAA and EDAM/WEIM entity, access control for viewing reports.

- Associate following trading location to the BAA
 - 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

Requirement Type	Core
Application(s)	AIM,CMRI

EDAME26-BRQ-25 New CMRI Report IST trades by BAA for the EDAM entity

New CMRI Report IST trades by BAA for the EDAM/WEIM entity, with access available via UI and B2B API

- Report and display for DAM, RTM:
- Name
- Market Type
- Trade Date
- Hour ending
- Trade Quantity (this is FmSC)
- Trade Type (IST)
- Trade Product Type (APNCPT, 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.

Requirement Type	Core
Application(s)	CMRI

Priority 2-Automatic provisioning of ADS dispatch information to EDAM Entity

BRQs

EDAME26-BRQ-26 Develop new role so that both EDAM and WEIM Entities can view all resource dispatches within their BAA on ADS

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

- Both ADS API and UI need to respect this role, EDAM and WEIM entities view all resource dispatches within their BAA

Requirement Type	Core
Application(s)	ADS,AIM

Priority 3.1-Entity RTUC Advisory Schedule Report in CMRI

Enhance the existing Real-Time Unit Commitment (RTUC) Advisory Schedules Report to EDAM/WEIM Entity

BRQs

EDAME26-BRQ-225 Enhance the existing Real-Time Unit Commitment (RTUC) Advisory Schedules Report to EDAM/WEIM Entity

Enhance the existing Real-Time Unit Commitment (RTUC) Advisory Schedules Report to EDAM/WEIM Entity

Provide EDAM and WEIM entities with visibility into RTUC Advisory Schedules for the operation day and prior 7 days at the applicable market interval granularity

Requirement Type	Core
Application(s)	CMRI

EDAME26-BRQ-227 The CMRI UI allows EDAM/WEIM entity users to view RTUC resource advisory schedules

The CMRI UI allows EDAM/WEIM entity users to view RTUC resource advisory schedules:

- Select trade date
- View RTUC Advisory Schedules for eligible resources associated with their entity.

Requirement Type	Core
Application(s)	CMRI

EDAME26-BRQ-226 Security and Access Control

Security and Access Control

EDAM and WEIM entities shall only be authorized to view RTUC Advisory Schedule information for resources associated with their respective Balancing Authority Area (BAA)

Requirement Type	Core
Application(s)	AIM,CMRI

Priority 3.2-Capacity Range Report in CMRI

CMRI report Capacity ranges from MQS for SC shadow settlements

BRQs

EDAME26-BRQ-264 The CMRI UI allows SC to view own resources' Capacity Range report

The CMRI UI allows SC to view own resources' Capacity Range report:

- Select trade date
- View resources' Capacity Range for eligible resources associated with the SC

Report includes:

Market Type = RTPD

- Min and Max Ex Cap
- IRUC and IRDC
- RCUC and RCDG
- IRU5 and IRD5

Requirement Type	Core
Application(s)	CMRI

EDAME26-BRQ-265 The system should provide API services for Scheduling Coordinator to retrieve own resources' capacity range

The system should provide API services for SC to retrieve resources' capacity range

- Allow authorized SC to retrieve resource capacity range data for resources associated with SC for the trade days.

Requirement Type	Core
Application(s)	CMRI

EDAME26-BRQ-266 Security and Access Control

Security and Access Control

SCs shall only be authorized to view and retrieve resources' capacity range for resources associated with the SC

Requirement Type	Core
Application(s)	AIM,CMRI

Priority 4-Transfer Location to ITC Mapping in ITS from MF

BRQs

EDAME26-BRQ-112 Include tie resources not scheduled at the scheduling point in the ITC limit calculation by using the Tie-to-ITC mapping and transfer location to ITC mapping

For these tie resources, including transfer resources (TSRs/ETSRs), that are not scheduled at the scheduling point, incorporate their schedules into the corresponding ITC limits, according to Tie to ITC mapping and transfer location to ITC mapping.

Requirement Type	Core
Application(s)	ITS

Priority 5-Real Time Nodal: Provide EDAM Entities access to report of day ahead results in BAAOP

BRQs

EDAME26-BRQ-27 Enable EDAM entities to access the set of DAM User Interfaces with functional equivalence to CAISO operator access

- The existing Day-Ahead Market (DAM) user interfaces (UIs) currently accessed through the Real-Time Market (RTM) environment shall be provided to the EIM BAAOP tab to provide EDAM Entities and external Balancing Authority (BA) users with a unified access point for both DAM and RTM market data and operational functions.
 - IFM-RTN Interface. Note: with EDAM, the Energy Column will be the IFM energy and the “RUC Capacity” will be the total with the RCU or RCD. The operator can infer the actual RCU or RCD.
 - Unit Details UI - Provides Capacity from Day Ahead, include startup/shutdown and conditions/telemetry tabs
 - DA generation Summary (Already in Coming Soon, we will provide to EDAMs)
 - OMS Contingency Activation (Already in Coming Soon, we will provide to EDAMs)
 - EIM Summary: Existing UI - DA TSR column added
 - ETSR Detail: Existing UI – DA TSRs will be visible
- The system shall provide EDAM Entities with equivalent access and treatment to that of CAISO operators for DAM UIs within RTM.
- Each BAA shall only be able to view and access its own respective DAM and RTM data.

Requirement Type	Core
Application(s)	BAAOP

Priority 6-Multiple GHG areas GHG functionality

Multiple GHG areas WA GHG functionality - testing and implementation of functionality to meet 2027 WA GHG requirements, area base load

BRQS**EDAME26-BRQ-29 Define GHG regulation area and network branch association in SGEM**

Define GHG regulation area and network branch association in SGEM

- Based on the GHG area Apnode and Cnode, if branch is within the GHG regulation area, define an attribute to associate branch with GHG regulation area

Requirement Type	Core
Application(s)	SGEM

EDAME26-BRQ-113 NA loss shall be calculated for each GHG area

Network transmission loss shall be calculated for each GHG area

Market shall calculate loss for each GHG area according to the associate branch with GHG regulation area

Allocate PBC slack under/oven Gen for GHG area

Requirement Type	Core
Application(s)	DAM,RTM

EDAME26-BRQ-30 Map GHG regulation areas and associated internal resources for all WEIM and EDAM BAAs that overlap with CA state and/or WA state

Map GHG regulation areas and associated internal resources for all WEIM and EDAM BAAs that overlap with CA state and/or WA state

- Any WEIM BAA that overlaps with Washington State and/or CA State must provide the substation-to-state mapping for all existing and new/future substations
- For each GHG regulation area, associate internal supply resources and demand resources

Requirement Type	Process
Application(s)	MasterFile

EDAME26-BRQ-31 Extend DEB and reasonableness threshold DEB to EDAM resources

Extend DEB and reasonableness threshold DEB to EDAM resources

- Provide DEB and reasonableness threshold DEB for all resources in all EDAM BAAs, by default, all the resources in the EDAM BAA

- Maintain existing logic when determining which resources the system shall calculate a DEB for

Include appropriate GHG cost for resources located within a GHG area (i.e. WA GHG cost for resources in WEIM WA GHG Area, CA GHG cost for resources in CA GHG area)

Requirement Type	Existing
Application(s)	ECIC

EDAME26-BRQ-32 Calculate Resource maximum GHG bid adders for resources to serve load in EDAM GHG regulation areas

Calculate Resource maximum GHG bid adders for resources to serve load in EDAM GHG regulation areas

- Maximum bid adders shall be specific to each GHG regulation area (i.e. one set of maximum bid adders for each GHG regulation area)
 - Use existing calculation methodology—use same external feeds as today
 - Use WA GHG allowance price for WA, and CA GHG allowance price for CA
 - A resource can serve multiple GHG regulation areas, so can have multiple maximum GHG bid adders.

Requirement Type	Existing
Application(s)	ECIC

EDAME26-BRQ-33 Broadcast new GHG related data

Broadcast new GHG bid adder:

- Most recent Resource maximum GHG bid adders for each GHG area

Requirement Type	Existing
Application(s)	ECIC

EDAME26-BRQ-34 GHG Bid submission and validation

GHG Bid submission and validation

- Allow Resources outside of the GHG area to submit separate GHG hourly bids (≥ 0) for each GHG regulation area
- GHG pseudo-tie shall not submit GHG bids for the area it is pseudo-tie to. They can submit GHG bid for other GHG area

Energy bid range must be equal to or exceed the GHG bid MW

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-35 Enforce the Bid Cap for Energy bid plus GHG bid

Enforce the Bid Cap for Energy bid plus GHG bid

- For each GHG bid for each GHG area: the sum of the GHG Bid Adder price and the Energy Bid price may not exceed the Soft Energy Bid Cap, unless the sum of a resource's maximum GHG bid adder and revised Default Energy Bid exceeds the Soft Energy Bid Cap
 - In this case, the sum of a resource's GHG Bid Adder and Energy Bid price may not exceed the sum of the maximum GHG bid adder and the resource's revised Default Energy Bid or the Hard Energy Bid Cap, whichever is lower
 - A revised default energy bid is the result of a manual (via ECIC) or automated (via SIBR) reference level change request

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-36 Display GHG Area Information in UI

Display GHG Area Information in UI

- DAM and RTM UIs shall display following GHG_Area Data for Generators, MSGs and Intertie resources:
 - Resource Parameter: use MF defined GHG_AREA_ID to display for GHG_AREA (CA, WA or null)
 - Bid Overview: use bid_data submitted GHG bid to display for GHG_AREA (CA, WA)

Requirement Type	Existing
Application(s)	DAM,RTM

EDAME26-BRQ-37 Consume MF defined GHG areas and association with nodes, ties and resources

Consume MF defined GHG areas and association with nodes, ties and resources

- GHG regulation areas
- GHG Anode and cnodes mapping
- GHG Area and associated resources
- GHG contractual resource MW
- GHG area and DLAP, ELAP, CLAP association
- GHG area and Ties association

Requirement Type	Existing
Application(s)	DAM,RTM

EDAME26-BRQ-94 The DAM will use the resource-specific GHG model for multiple GHG regulation areas using the resource's GHG reference point from the GHG reference pass: Access data

The DAM will use the resource-specific GHG model for multiple GHG regulation areas using the resource's GHG reference point from the GHG reference pass: Access data

- In MPM and IFM, use the resource specific attribution GHG model, similar to the model used in the WEIM
- Access the MF-defined GHG regulation areas and associated resources
- Consume the SIBR-submitted GHG bids and the association of a resource's GHG bid to a specific GHG regulation area

Requirement Type	Existing
Application(s)	DAM

EDAME26-BRQ-268 GHG Model: The DAM will use the resource-specific GHG model for multiple GHG regulation areas using the resource's GHG reference point from GHG pass

GHG Model: The DAM will use the resource-specific GHG model for multiple GHG regulation areas using the resource's GHG reference point from GHG pass

- Optimal allocation GHG transfer to non-GHG regulation area resource for each GHG area
 - Include the GHG bids for the portion of the GHG MW allocated to the resource in the objective function

$$\min \left(C + \sum_{t=1}^T \sum_i \sum_g \widehat{EN}_{i,g,t} \text{GHGBR}_{i,g,t} \right)$$

- The GHG transfer for each GHG regulation area is defined as (physical and virtual supply (include PDR and Gen bid, GHG pseudo-tie) minus physical and virtual load schedule and export minus loss in IFM) for the GHG area

$$T_{g,t} \equiv \sum_{i \in \text{GHG}_g} (EN_{i,t} + I_{i,t} - E_{i,t} - L_{i,t}) - \text{Loss}_{g,t}, \forall g \wedge t = 1, 2, \dots, T$$

$$\text{Loss}_{g,t} \cong \text{ALF}_{g,t} \sum_{i \in \text{GHG}_g} \tilde{L}_{i,t}, \forall g \wedge t = 1, 2, \dots, T$$

($\tilde{L}_{i,t}$) is the load schedule of previous iteration

- Transmission losses in the GHG regulation area are derived from the ACPF solution, but their marginal impact on the constraint is ignored
- If losses are not calculated by the ACPF solution, use a static percentage of the BAA's losses that are being attributed to a particular GHG region.
- The GHG import allocation constraint in the IFM has follows:

$$-T_{g,t} \cong - \sum_{i \in \text{GHG}_g} (EN_{i,t} + I_{i,t} - E_{i,t} - L_{i,t}) + \widetilde{\text{Loss}}_{g,t} \leq \sum_{i \in \text{GHG}_g} \widehat{EN}_{i,g,t},$$

$$\forall g \wedge t = 1, 2, \dots, T$$

Requirement Type	Existing
Application(s)	DAM

EDAME26-BRQ-95 Include PBC slack in the GHG import allocation constraint

Include PBC slack in the GHG import allocation constraint

For split BAA in/out of GHG area, use LDF to allocate the PBC slack of the BAA—included in the GHG import allocation constraint—in a manner consistent with the single GHG area modeling of PBC slack, for each interval, for each GHG area.

Requirement Type	Core
Application(s)	DAM,RTM

EDAME26-BRQ-38 Define CLAP for load in each GHG Regulation Area and load outside of all GHG Regulation Areas for both EDAM and WEIM BAA

Define CLAP for load in each GHG Regulation Area and load outside of all GHG Regulation Areas for both EDAM and WEIM BAA

- Define Load Resource ID for each CLAP
 - For WEIM: Load Resource ID shall only be associated with WEIM Entity

For EDAM only: any SC registered load that partially overlaps with GHG regulation areas will need to be split into separate CLAPs

Requirement Type	Process
Application(s)	MasterFile

EDAME26-BRQ-39 For all WEIM and EDAM BAAs: Validate that CLAPs and ELAP fully overlap (i.e., all load is accounted for)

For all WEIM and EDAM BAAs: Validate that CLAPs and ELAP fully overlap (i.e., all load is accounted for)

Requirement Type	Process
Application(s)	MasterFile

EDAME26-BRQ-40 Access MF Defined CLAPs

Access MF Defined CLAPs

Requirement Type	Existing
Application(s)	DAM,RTM

EDAME26-BRQ-41 Differentiate between existing and new load base schedule calculations

Differentiate between existing and new load base schedule calculations

Existing load base schedule calculations should not be impacted by this CLAP/LDF model in RTBS

Requirement Type	Core
Application(s)	RTBS

EDAME26-BRQ-42 Calculate base load for WEIM BAA CLAPs using ELAP LDF data in RTBS

Calculate base load for WEIM BAA CLAPs using ELAP LDF data in RTBS

Requirement Type	Core
Application(s)	RTBS

EDAME26-BRQ-43 Publish ELAP LDFs for WEIM BAAs at LAP level in RTBS

Publish ELAP LDFs for WEIM BAAs at LAP level in RTBS

Requirement Type	Core
Application(s)	RTBS

EDAME26-BRQ-44 Extend to EDAM: Consume and publish all EDAM BAA LDFs to EDAM Entities

Extend to EDAM: Consume and publish all EDAM BAA LDFs to EDAM Entities

- Each BAA's LDFs may be viewable by other BAAs (i.e. do not have to be certificate protected/separated for each BAA)

Requirement Type	Existing
Application(s)	MPP

EDAME26-BRQ-45 Consume and publish all WEIM BAA LDFs to WEIM Entities

Consume and publish all WEIM BAA LDFs to WEIM Entities

Requirement Type	Core
Application(s)	MPP

EDAME26-BRQ-46 WEIM/EDAM Entities shall provide load meter based on LAP Resource IDs

WEIM/EDAM Entities shall provide load meter based on LAP Resource IDs

- Meter may be based on BA load meter and LDF.

Note:

Provide meter per SQMD plan

Requirement Type	Process
Application(s)	MRI-S

EDAME26-BRQ-47 Consume LAP and LDF Data

Consume LAP and LDF Data:

- All CLAP Resource IDs
- DA and RT LDFs for ISO forecast zones and EDAM BAA forecast zones

Notes:

- Existing service for CAISO BAA and EDAM BAA (EDAM BAA is new data)

LDFs are used for LAP UIE neutrality calculations

Requirement Type	Existing
Application(s)	DReAMS, Settlements

EDAME26-BRQ-48 Consume GHG Attributions to include multiple GHG areas for Resource SC

Consume GHG Attributions to include multiple GHG areas for Resource SC

- From Market, receive resource GHG attributions and GHG prices by GHG area
- From PCA, receive resource GHG corrected prices by GHG area

Requirement Type	Existing
Application(s)	Settlements

EDAME26-BRQ-49 Report for on GHG Attributions to include multiple GHG areas for Resource SC

Report for on GHG Attributions to include multiple GHG areas for Resource SC

- GHG Area: CA Export Allocations (CA GHG Awards)
- GHG Area: WA Export Allocations (WA GHG Awards)
 - Use market product type and state fields to determine applicable product
- Applies to DA and RT

Requirement Type	Existing
Application(s)	CMRI

EDAME26-BRQ-50 Report on DA GHG Attributions to include multiple GHG areas for EDAM entity

Report on DA GHG Attributions to include multiple GHG areas for EDAM entity

- GHG Area: CA Attributions (CA GHG Awards)
- GHG Area: WA Attributions (WA GHG Awards)

- New report in new EDAM dropdown

Requirement Type	Existing
Application(s)	CMRI

EDAME26-BRQ-51 Report on RT(include both FMM and RTD) GHG Attributions to include multiple GHG Areas for Resource SC

Report RTM (include both FMM and RTD) GHG Attributions to include multiple GHG Areas for Resource SC

- GHG Area: CA attributions (CA GHG Awards)
- GHG Area: WA attributions (WA GHG Awards)

Requirement Type	Existing
Application(s)	CMRI

EDAME26-BRQ-52 Report on RT (include both FMM and RTD) GHG Attributions to include multiple GHG Areas for WEIM entity

Report on RT (include both FMM and RTD) GHG Attributions to include multiple GHG Areas for WEIM entity

- GHG Area: CA attributions (CA GHG Awards)
- GHG Area: WA attributions (WA GHG Awards)

Requirement Type	Existing
Application(s)	CMRI

EDAME26-BRQ-53 New Publish: total net GHG Import Transfer deemed for each GHG regulation area by market type

New Publish: total net GHG Import Transfer deemed for each GHG regulation area by market type

- Breakdown for each market type (DA, FMM, RTD) for each GHG regulation area (CA and WA)

Requirement Type	Existing
Application(s)	OASIS

EDAME26-BRQ-54 Extend to EDAM: DA GHG Clearing Price Reporting by GHG Regulation Area

Extend to EDAM: DA GHG Clearing Price Reporting by GHG Regulation Area

- Consume DA GHG Clearing prices

- Publish DA GHG clearing prices for EDAM GHG Regulation Area (includes market prices and PCA-corrected prices)

Requirement Type	Existing
Application(s)	OASIS

EDAME26-BRQ-55 Extend to EDAM: RT GHG Clearing Price Reporting by GHG Regulation Area

Extend to EDAM: RT GHG Clearing Price Reporting by GHG Regulation Area

- Consume RT GHG Clearing prices
- Publish RT GHG clearing prices for EDAM GHG Regulation Area (includes market prices and PCA-corrected prices)

Requirement Type	Existing
Application(s)	OASIS

Priority 7-Manage AS bids for EDAM in RTM: SIBR

BRQs

EDAME26-BRQ-104 Allow EDAM resource to submit AS self-provision bid in RTM

Allow EDAM resource to submit AS self-provision bid in RTM

Allow EDAM resource SC to submit resource ancillary service self-provision hourly bids MW changes in RTM for non-CAISO EDAM Entities

Requirement Type	Core
Application(s)	SIBR

Priority 8-EDAM Entity DAM Data Access: TSR Visibility in SIBR

- EDAM Entity DAM Data Access: TSR Visibility in SIBR
 - provide report for EDAM entity to retrieve TSR Capacity and type

BRQs

EDAME26-BRQ-105 Provide Service for External Entity to retrieve TSR schedule and type

Provide a service for EDAM entities to retrieve TSR CRN capacity and breakdown information after 9am bid submission

This service enables EDAM entities to access a detailed breakdown of how transmission customers plan to exercise their capacity, for Trading Hour, Transfer Location, CRN Reference, and SC:

- The CRN capacity held by the customer (CRN)
- Capacity exercised (EXR)
- Capacity released (REL)
- Capacity reserved (REV)

The report includes both registered TSRs and transient TSRs associated with the EDAM entity.

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-114 EDAM entity access UI report in SIBR for CRN released capacity

EDAM entity access UI report in SIBR for CRN released capacity

SIBR has a UI report as a sub tab for the RSE Capacity.

SIBR shall notify the EESC for the EDAM BAA associated with that Transfer Location about the following:

- the CRN Capacity for that Trading Hour, Transfer Location, CRN Reference, and SC;
- the Released Capacity (REL) for that Trading Hour, Transfer Location, CRN Reference, and SC;
- the exercised right (EXR) calculated as the sum of CRN Self-Schedule Quantities specified in the CRN Self-Schedule Bid Components in all Inter-Tie Resource Bids for TSR Type 1 for that Trading Hour, Transfer Location, CRN Reference, and SC; and
- the reserved right (REV) calculated as that CRN Capacity minus that Released Capacity minus that exercised right.

Requirement Type	Existing
Application(s)	SIBR

Priority 9-SIBR RSE Capacity Report future dates (SIBR)

Enhance report resource advisory max bid capacity of CAISO and EDAM entities for D+1 through D+7 (in Open market)

BRQs

EDAME26-BRQ-180 Enhance report resource advisory max bid capacity of CAISO and EDAM entities for D+1 through D+7

Enhance report resource advisory max bid capacity of CAISO and EDAM entities for D+1 through D+7 – (in Open market)

Enhance the existing D+1 SIBR EDAM RSE Capacity Report to provide resource bid capacity visibility for D+1 through D+7 and make the latest unbinding, advisory or estimated information available for authorized CAISO and EDAM users.

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-228 Max bid Capacity shown based on latest bids submitted

Max bid Capacity shown based on latest bids submitted:

- For each selected operating day (D+1 through D+7), the system shall show the hourly maximum bid capacity for every eligible resource associated with an RSE and EDAM entity
- The hourly maximum bid capacity shall be derived from the latest submitted resource bid data applicable to the corresponding operating day.
- The calculation shall include the following bid types:
 - Generation resource bids
 - Intertie resource bids
 - Load resource bids
- The system shall show and store the hourly maximum bid capacity for each resource and each trading hour of the selected operating day

Requirement Type	Existing
Application(s)	SIBR

EDAME26-BRQ-229 SIBR UI for Display max bid capacity D+1 through D+7

User Interface for Display max bid capacity

- The SIBR UI shall allow users to:
 - Select an operating day from D+1 through D+7.
 - Select an applicable CAISO or EDAM entity.
 - View the hourly maximum bid capacity for all eligible resources associated with the selected entity and operating day.
- The report shall display resource-level hourly maximum bid capacity values for all 24 operating hours of the selected date.

If no bid submission exists for a resource on the selected operating day, the system shall display a blank or null value for that resource and hour.

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-230 API for entities to retrieve max bid capacity for D+1 through D+7

API for entities to retrieve max bid capacity

- The system shall provide API services that enable authorized EDAM entities to retrieve hourly resource bid capacity information.
- The API shall support requests for:

- D+1 operating day data.
- Any available operating day between D+2 and D+7.
- The API response shall return all available resources associated with the requesting EDAM entity and their corresponding hourly maximum bid capacities.
- If bid data is unavailable for a requested resource or operating day, the API shall return an empty or null value consistent with existing API standards.

Requirement Type	Core
Application(s)	SIBR

EDAME26-BRQ-231 Data Access control for the resources associated with entities for D+1 through D+7

Data Access control for the resources associated with entity

- An EDAM entity shall only be authorized to view resource bid capacity information for resources associated with its own Balancing Authority Area (BAA).
- API access shall be restricted to resources belonging to the requesting EDAM entity's BAA.
- Users shall not be permitted to view bid capacity information belonging to other EDAM entities unless explicitly authorized by CAISO market security policies for ISO market operator

Requirement Type	Existing
Application(s)	AIM,SIBR

Priority 12-OASIS transmission interface usage report for TSR/ETSR and IR/RC

Have TSR schedules included with SR schedules (existing) in the Transmission Interface Usage report and Current Transmission Usage on OASIS (MIAF-2026-30, CIDI 297268), display IR/RC usages

BRQs

EDAME26-BRQ-199 Calculate and broadcast aggregated Imbalance Reserve (IR) contribution in Transmission Interface Usage for market clearing outcome

Calculate and broadcast aggregated Imbalance Reserve (IR) contribution in Transmission Interface Usage for market clearing outcome

- Import Direction: sum of all awards of IRU import and IRD export from Inter-ties, Tie Gen, dynamic schedule, Pseudo tie, TSR
- Export Direction: sum of all awards of IRD import and IRU export from Inter-ties, Tie Gen, dynamic schedule, Pseudo tie, TSR
- Broadcast new optional fields IR contribution for import/export directions for the transmission usage

Requirement Type	Core
Application(s)	DAM

EDAME26-BRQ-240 Calculate and broadcast Reliability Capacity (RC) contribution in Transmission Interface Usage

Calculate and broadcast Reliability Capacity (RC) contribution in Transmission Interface Usage

- Import Direction: sum of all awards of RCU import and RCD export from Inter-ties, Tie Gen, dynamic schedule, Pseudo tie, TSR
- Export Direction: sum of all awards of RCD import and RCU export from Inter-ties, Tie Gen, dynamic schedule, Pseudo tie, TSR
- Broadcast new optional fields RC contribution for import/export directions for the transmission usage

Requirement Type	Core
Application(s)	DAM,DA-RUC

EDAME26-BRQ-241 Include and broadcast TSR/ETSR in net Scheduled Energy in Transmission Interface Usage from market

Include energy transfers TSR or ETSR in net Scheduled Energy in Transmission Interface Usage for market clearing outcome

- In DAM, Include TSR Import/Export schedules in the net Scheduled Energy calculation as the (sum of imports – sum of exports) for the interface from Inter-ties, Tie Gen, dynamic schedule, Pseudo tie, TSR
- In RTM, Include ETSR Import/Export schedules in the net Scheduled Energy calculation as the (sum of imports – sum of exports) for the interface from Inter-ties, Tie Gen, dynamic schedule, Pseudo tie, TSR, ETSR
- Broadcast updated net energy that accounts the TSR or ETSR schedules in the corresponding DAM or RTM

Requirement Type	Core
Application(s)	DAM,RTM

EDAME26-BRQ-242 No change for ATC calculations

IR and RC transfers do not affect ATC calculations in DAM

TSR/ETSR energy are included in net energy calculations.

Requirement Type	Existing
Application(s)	DAM,OASIS,RTM

EDAME26-BRQ-243 OASIS Receive the Market Clearing outcome with IR and RC contributions, net energy including TSR/ETSR

Receive the Market Clearing outcome

include aggregated IR/RC contributions on transmission interface and net Energy scheduled on transmission interface that account for TSR/ETSR schedules

Requirement Type	Core
Application(s)	OASIS

EDAME26-BRQ-244 Update UI Transmission Interface Usage include IR/RC contributions and net Energy that account for TSR/ETSR schedules

Update UI Display for Transmission Interface Usage report:

For DAM:

- include IR from import/export
- include RC from import/export
- net Energy that accounts for TSR energy schedules (existing field with updated value include TSR)

For HASP and RTPD

- net Energy that accounts for TSR/ETSR energy schedules (existing field with updated value include TSR, ETSR)

Requirement Type	Core
Application(s)	OASIS

EDAME26-BRQ-248 Update UI Current Transmission Usage net Energy that account for TSR/ETSR schedules

Update UI Display for Current Transmission Usage report:

- Net Energy that accounts for TSR/ETSR energy schedules

Requirement Type	Core
Application(s)	OASIS

EDAME26-BRQ-249 Download transmission interface usage report includes new fields

Ensure API download transmission interface usage report includes new fields

Update Download that include IR/RC contributions and net Energy that account for TSR/ETSR schedules for Transmission Interface Usage

Requirement Type	Core
Application(s)	OASIS

Priority 13-TCORs/ITCs in PLC

EDAM Entity Visibility and Management of TCOR/ITC Data in PLC

BRQs

EDAME26-BRQ-210 EDAM Entity Visibility and Management of TCOR/ITC Data in PLC

EDAM Entity Visibility and Management of TCOR/ITC Data in PLC

Provide EDAM entities with the ability to view, submit, maintain, and retrieve Transmission Control Operating Rights (TCORs) and Intertie Contract (ITC) limit data within the PLC framework.

Requirement Type	Core
Application(s)	PLC

EDAME26-BRQ-251 Build and manage TCOR/ITC Reference Data in PLC

Build and manage TCOR/ITC Reference Data

- The system shall build and maintain the list of valid TCOR in SGEM and ITC identifiers in MF available within PLC.
- The system shall make the TCOR and ITC identifier list available for use during data submission, validation, and display.

Requirement Type	Core
Application(s)	PLC

EDAME26-BRQ-252 Entity TCOR/ITC Limit Submission in PLC

TCOR/ITC Limit Submission

- The system shall allow EDAM entities to submit TCOR and ITC limit values for applicable trading intervals.
- Each submission shall include:
 - TCOR or ITC identifier
 - Direction
 - Applicable interval(s)
 - Limit value(s)
 - Submission timestamp
- The system shall validate submitted TCOR and ITC identifiers against the approved identifier list maintained in PLC.
- The system shall store submitted limits and maintain the latest accepted submission for each TCOR/ITC and interval.

Note: Simplify ETCC payload
No associated outage needed in the submission, only the TCOR id and limits

Requirement Type	Core
Application(s)	PLC

EDAME26-BRQ-253 Resubmission and Updates TCOR/ITC limits in PLC

Resubmission and Updates

The system shall allow EDAM entities to modify and resubmit TCOR and ITC limits prior to the applicable market close (10am)

The latest accepted submission received before market close shall replace any previous submission for the same TCOR/ITC and interval.

After market close, submissions and updates for the applicable interval shall no longer be accepted.

Requirement Type	Core
Application(s)	PLC

EDAME26-BRQ-255 API Requirements allows authorized EDAM entities to retrieve their latest accepted TCOR and ITC submissions

API Requirements

- The system shall provide an API that allows authorized EDAM entities to retrieve their latest accepted TCOR and ITC submissions.
- The API shall return:
 - TCOR/ITC identifier
 - Interval
 - Submitted limit value
 - Submission status
 - Latest accepted submission timestamp
- The API shall provide only the most recent accepted submission

Requirement Type	Core
Application(s)	PLC

EDAME26-BRQ-256 Access Control: Entities retrieve their own TCOR and ITC data

Access Control

- EDAM entities shall only be permitted to submit, update, view, and retrieve TCOR and ITC data associated with their own organization.

Requirement Type	Core
Application(s)	AIM,PLC

Priority 14.1-Registered System resources in Master File (MF) for EDAM entity

BRQs

EDAME26-BRQ-273 MF provide registered system resource operational data set associated with BAA

MF Provide registered system resources operational data set associated with BAA

- Including all active registered system resources: Intertie import/export resource, Transfer resources (ETSR/TSR), wheeling resources, associated SC, BAA
 - information that is operationally relevant: type, location, from/to BAAs, direction, associated flowgate/ITC, associated CRN, operational capacity limits
- excluding market-sensitive cost, pricing and settlement data.

Requirement Type	Core
Application(s)	MasterFile

EDAME26-BRQ-275 API that enables entities to retrieve registered system resource operational data

API that enables authorized EDAM/WEIM entities to retrieve registered system resource operational data

Provide a secure API that enables authorized entities to retrieve all active registered Intertie resource operational data associated with BAAs for the EDAM/WEIM entity

Requirement Type	Core
Application(s)	MasterFile

EDAME26-BRQ-279 Access Control to retrieve entity own registered resource data **Access Control to retrieve registered system resource data of the BAAs of the EDAM/WEIM entities**

- An entity shall only be authorized to retrieve system resource operational data for the resources physically located within, or associated with, the BAAs represented by that EDAM/WEIM entity

Requirement Type	Core
Application(s)	AIM,MasterFile