

2027-28 IRM STUDY MILESTONE SCHEDULE

Attachment #4.1.1
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Month	Assignments/Actions for month	IRM Study Milestones
January	ICS Meeting	-ICS identifies issues needing to be addressed for preparation for IRM Study: milestone schedule; potential new models, including modeling development scope requirements; list of tasks, and initial look at possible Policy 5 revisions.
February	ICS Meeting	-ICS approves milestone schedule. -ICS approves scopes of potential new models and whitepapers -ICS reviews initial IRM Study Assumptions Matrix.
	EC Meeting	-EC approves milestone schedule.
	ICS/NYISO (Post Meeting)	-ICS begins preparation of potential new models. -NYISO begins preparation of preliminary transmission topology and requests TO's input.
March	ICS Meeting	-ICS reviews status of potential new models and updated 2027 IRM Study Assumptions Matrix.
	ICS/NYISO	-ICS completes new model development and prepares whitepaper.
April	ICS Meeting (3/31)	-ICS reviews draft whitepapers for new models. -ICS reviews updated IRM Study Assumptions Matrix.
	ICS/NYISO (Post Meeting)	-NYISO reviews GADS data. -NYISO installs any updated MARS software and benchmarks as necessary. -NYISO begins base case build-up used for parametric analysis.
May	ICS Meeting (4/28)	-ICS approves new model whitepapers. -ICS reviews updated IRM Study Assumptions Matrix. -If applicable, ICS approves use of new MARS version.
	EC Meeting	-EC approves new model whitepapers.
	ICS/NYISO (Post Meeting)	-NYISO verifies preliminary transmission topology with TOs and sends to TPAS/SOAS and ICS for review.
June	ICS Meeting	-ICS reviews updated IRM Study Assumptions Matrix, including preliminary transmission topology. -ICS completes draft of any Policy 5 revisions for EC approval.
July	ICS Meeting	-ICS approves preliminary IRM Study Assumptions Matrix.
	EC Meeting	-EC approves preliminary IRM Study Assumptions Matrix.
	ICS/NYISO (Post Meeting)	-NYISO performs parametric study to be used as the basis for Table 6-1 of IRM Study report. -NYISO conducts preliminary IRM Tan 45 study following parametric study. -ICS members prepare list of proposed sensitivity cases and submits to ICS chair.
August	ICS Meeting	-ICS approves list of sensitivity cases. -ICS reviews parametric study results and preliminary Tan45 analysis and IRM. -ICS approves preliminary base case IRM
	EC Meeting	-EC approves list of sensitivity cases. -EC reviews preliminary base case IRM and parametric results

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	ICS Mid Month	-ICS reviews and approves parametric study results and preliminary Tan 45 analysis and IRM, if needed.
	ICS/NYISO (Post Meeting)	-NYISO sends the completed initial master input file to GE by 8/1. -NYISO provides initial masked/encrypted input data to TOs for data quality assurance review by 8/5 -NYISO begins sensitivity testing for Table 7-1 based on preliminary base case.
September	ICS Meeting	-ICS approves parametric results for Table 6-1. -NYISO and TOs report preliminary data base quality assurance review. -ICS accepts preliminary data base quality assurance review. -ICS reviews initial Final IRM Study Assumptions Matrix. -ICS reviews and approves preliminary sensitivity results.
	EC Meeting	-EC reviews preliminary sensitivity results
	ICS/NYISO (Post Meeting)	-NYISO staff/LFTF prepares fall load forecast and delivers to ICS. -NYISO, GE and TOs complete preliminary base case data quality assurance reviews. -By 9/22/26, NYISO and TOs submits final transmission topology changes, if any, to TPAS/SOAS and ICS.
October	ICS Meeting	-ICS approves fall load forecast. -ICS approves Final IRM Base Case Assumption Matrix.
	EC Meeting	- EC approves Final IRM Base Case Assumption Matrix.
	ICS/NYISO (Post Meeting)	-ICS conducts base case study and determines final base case including Tan 45 analysis and IRM. -ICS prepares initial draft IRM report, including Tables 6-1 and 7-1. -NYISO delivers final base case input files to GE for incremental review and masking. -GE provides masked database to the NYISO.
November	ICS Meeting	-NYISO provides masked database for final TO review. -NYISO reports any changes based on final base case review. -ICS reviews and provides comments on first draft IRM report. -EC reviews and provides comments on second draft IRM report. -ICS approves final IRM base case. -ICS identifies the need for a Special Sensitivity Case.
	EC Meeting	-EC approves final IRM base case.
	ICS Mid-Month	-ICS accepts final base case quality assurance review. -NYISO completes special sensitivity case Tan 45 analysis. -ICS determines if Special Sensitivity Case should become final base case and obtains EC approval.
	ICS/NYISO (Post Meeting)	-ICS prepares final draft IRM report (ICS).
December	ICS Meeting	-ICS approves final draft IRM report.
	EC Meeting	-EC approves IRM report, final IRM, and IRM resolution.
	ICS/EC/NYISO (Post Meeting)	-Issue IRM letter to NYISO CEO (EC). -IRM filing to FERC required (EC). -ICS drafts list of potential whitepapers for prioritization at January ICS meeting.
January 2027	ICS/EC/NYISO	-Prepare alignment study if final IRM is less than base case IRM – see Policy 5, appendix C. (NYISO). -Agenda item, if needed, to review alignment study (ICS)*.