

**2025-26 IRM STUDY MILESTONE SCHEDULE**

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. -NYISO review Policy 5 adjustment process for previous years approved IRM
February	ICS Meeting	-ICS <b>approves</b> milestone schedule. -ICS <b>approves</b> scopes of potential new models and Whitepapers, e.g., external Area modeling. -ICS reviews initial IRM Study Assumptions Matrix.
	EC Meeting	-EC <b>approves</b> 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 2024 IRM Study Assumptions Matrix.
	ICS/NYISO	-ICS completes new model development and prepares white paper.
April	ICS Meeting	-ICS reviews draft white papers 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	-ICS <b>approves</b> new model white papers. -ICS reviews updated IRM Study Assumptions Matrix. -If applicable, ICS <b>approves</b> use of new MARS version.
	EC Meeting	-EC <b>approves</b> new model white papers.
	ICS/NYISO (Post Meeting)	-NYISO verifies preliminary transmission topology with TOs and sends to TPAS 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 <b>approves</b> preliminary IRM Study Assumptions Matrix.
	EC Meeting	- EC <b>approves</b> 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 <b>approves</b> list of sensitivity cases.
	EC Meeting	-EC <b>approves</b> list of sensitivity cases.
	ICS Mid Month	-ICS reviews parametric study results and preliminary tan 45 analysis and IRM.

	ICS/NYISO (Post Meeting)	-NYISO sends the completed initial master input file to GE by August 22 <sup>nd</sup> .
<b>September</b>	ICS Meeting	-ICS <b>approves</b> parametric results for Table 6-1. -ICS <b>approves</b> preliminary base case IRM. -EC reviews preliminary base case IRM and parametric results.
	ICS/NYISO (Post Meeting)	-NYISO provides initial masked/encrypted input data to TOs for data quality assurance review by 9/15. -NYISO begins sensitivity testing for Table 7-1 based on preliminary base case. -NYISO staff/LFWG prepares fall load forecast and delivers to ICS. -NYISO, GE and TOs complete preliminary base case data quality assurance reviews. -By 9/22/23, NYISO and TOs submits final transmission topology changes, if any, to TPAS and ICS.
<b>October</b>	ICS Meeting	-ICS <b>approves</b> fall load forecast. -NYISO and TOs report preliminary data base quality assurance review. -ICS accepts preliminary data base quality assurance review. -ICS reviews and approves preliminary sensitivity results. -EC reviews preliminary sensitivity results. -ICS <b>approves</b> Final IRM Base Case Assumption Matrix. -
	EC Meeting	- EC <b>approves</b> Final IRM Base Case Assumption Matrix.
	ICS/NYISO (Post Meeting)	-NYISO completes sensitivity testing. -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 data base to the NYISO.
<b>November</b>	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 <b>approves</b> final IRM base case. -ICS identifies the need for a Special Sensitivity Case.
	EC Meeting	-EC <b>approves</b> 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).
<b>December</b>	ICS Meeting	-ICS <b>approves</b> final draft s IRM report.
	EC Meeting	-EC <b>approves</b> 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). -Prepare alignment study if Final IRM is less than base case IRM – see Policy 5, appendix C. (NYISO). -Special conference call around mid-December, if needed, to approve alignment study (ICS)*. -ICS drafts list of potential whitepapers for prioritization at January ICS meeting.