

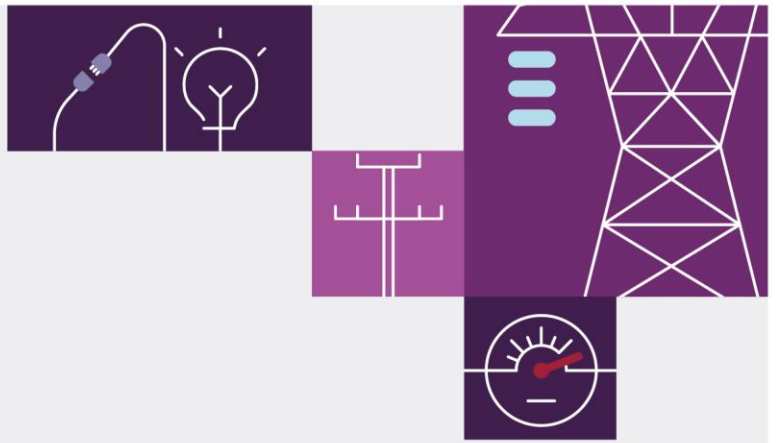
EMMS – Portfolio Management System – August 2026

0.01 May 2026

Pre-production: TBC

Production: 26 August 2026 (TBC)





Important notice

Purpose & audience

This document describes the technical changes required to participant's systems for the EMMS – Portfolio Management System – August 2026 (Release). The Australian Energy Market Operator (AEMO) provides this information as a service targeting business analysts and IT staff in participant organisations. It provides guidance about the changes to their market systems under the National Electricity Rules (Rules), as at the date of publication.

How to use this document

- If you have questions about the business aspects of these changes, please see Consultations on AEMO's website.
- The references listed throughout this document are primary resources and take precedence over this document.
- Unless otherwise stated, you can find resources mentioned in this guide on AEMO's website.
- **Text in this format** is a link to related information. Some links require access to MarketNet.
- **Text in this format**, indicates a reference to a document on AEMO's website.
- **Text in this format** is an action to perform in the Markets Portal.
- This document is written in plain language for easy reading. Where there is a discrepancy between the Rules and information or a term in this document, the Rules take precedence.
- Glossary Terms are capitalised and have the meanings listed against them in the Glossary.
- Rules Terms have the meaning listed against them in the [National Electricity Rules](#) (Rules).

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Distribution

Available to the public.

Document Identification

Prepared by: AEMO Digital

Last update: Friday, 29 May 2026 1:55 PM

Version History

0.01 Initial creation

Documents made obsolete

The release of this document changes only the version of EMMS – Portfolio Management System – August 2026.

Support Hub

To contact AEMO's Support Hub use Contact Us on AEMO's website or for urgent matters phone: 1300 AEMO 00 (1300 236 600).



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1 Introduction

1.1 Audience

AEMO provides this information as a service targeting business analysts and IT staff in Registered Participant companies.


The primary audience for this technical specification are:

- Demand Response Service Providers (DRSPs)
- Market customers
- Integrated Resource Providers (IRPs)

1.2 Objective

The EMMS – Portfolio Management System – August 2026 (Release) describes the projects planned by AEMO from a participant perspective and includes any system related changes for participants.

1.3 Status

Version	Status
0.01	 <p>Initial Draft for review.</p> <p>Presents the EMMS – Portfolio Management System – August 2026 evolving design.</p> <p>Please send feedback to Contact Us. In the Details of your enquiry section, mention the EAS Knowledge Management team as the Resolver group.</p>

1.4 Release dates

Scheduled for implementation in:

- Pre-production: TBC
- Production: 26 August 2026 (TBC)

1.5 Projects and enhancements

Changes and enhancements for this Release include:

No.	Functionality	Change	Affected interface	Reference
1	Portfolio Management System	Automatic invalid NMI removal	Existing Markets Portal > Portfolio Management System	Markets Portal
		Automatic declassification configuration	Existing Markets Portal > Portfolio Management System	Markets Portal
		Re-upload application behaviour	Existing Markets Portal > Portfolio Management System	Markets Portal
		Export application data	Existing Markets Portal > Portfolio Management System	Markets Portal
		Performance improvements	Existing Markets Portal > Portfolio Management System	Markets Portal
		Table navigation improvements	Existing Markets Portal > Portfolio Management System	Markets Portal

1.6 Rule and procedure changes

The following rules and procedures take precedence over technical specifications and guides.

Title

[NER Rule 3.10](#)

[NER Rule 3.11](#)

1.7 Related technical specifications

Title	Description
N/A	N/A

1.8 Related documents

Once published, these resources take precedence over this technical specification

These guides and resources are updated according to this technical specification and published for the pre-production Release Date.

Title	Description	Status
Markets Portal Help	Updates the guide to Portfolio Management System	In progress

1.9 Approval to change

There is no approval or agreement to change required from participant change controllers for this release. All changes in this release are on AEMO's side.

1.10 Market systems user group meetings

The Market Systems User Group (MSUG) is an industry user group established to discuss NEM wholesale and retail IT systems releases. Its purpose is to facilitate the continuing improvement of AEMO's IT systems by seeking feedback and collaboration from participants.

MSUG meetings are open to all interested parties, with invitations sent to all included on the distribution list. If you have a technical question for a project and want to attend the MSUG ask your company's support team to include your email address in their **AEMO Help Desk Bulletin (CRM)** distribution list.

1.11 Version numbers

AEMO releases new versions of this document as the technical requirements are streamlined.

Incremental version numbers such as 1.01, 2.01 and so on mean there is a minor change to the technical specification.

Major version numbers such as 1.00, 2.00 means there are substantial changes to the technical specification. Participants must carefully review these changes, detailed below.

1.12 Changes in this version

- No changes, this is the initial version.

2 Proposed Timeline

The dates for the Market System User Group Meetings (MSUG) are tentative. We will provide an invitation one week prior to the meeting.

Milestone	Date	Description
Approval required	N/A	Final date for participant approval of this Release
Revised Technical Specification	29 May 2026	<p>AEMO releases new versions of this document as the technical requirements are streamlined. During the project this document is the source of truth</p> <p>From the production release, the technical specification becomes final and the related documents become the source of truth</p> <p>Technical Specification Portal</p>
Related Documents publication	26 August 2026	Release of guides and resources mentioned in Related on page 3
Next MSUG	3 June 2026	<p>Market Systems User Group Meeting (MSUG) to review the technical specification and ask AEMO technical SMEs questions</p> <p>This date is tentative. The Knowledge Management Team provides the invitation prior to the meeting</p>
Pre-production refresh	18 May 2026 –25 May 2026	Refresh of the pre-production system with data refreshed from the production system. An outage of up to five days can occur to the pre-production environment during this period. Participant access is not restricted, however, AEMO do not guarantee the pre-production data content or system availability. During the refresh, access to other AEMO systems such as AWEFS, EMMS, OPDMS, and STTM may be intermittently affected

Proposed Timeline

Milestone	Date	Description
Pre-production implementation	TBC	<p>AEMO implements components of the Release to pre-production for participant testing</p> <p>AEMO has full access to the system during this period</p> <p>Participant access is not restricted; however, the data content or system availability is not guaranteed</p>
Pre-production available	TBC	Testing period begins for participants
Market Trials	N/A	AEMO coordinated testing with all participants
Participant Testing	TBC	Unstructured participant testing in the pre-production environment
Production implementation	1 August 2026	AEMO implements the release to production
Production systems available	26 August 2026 (TBC)	Production systems available to participants



3 Participant Impact

Registered Participants can comply with this release without making any changes to their systems. All changes are on AEMO's side.



4 Portfolio Management System Enhancements

4.1 Goal

This release introduces the final set of enhancements to the Portfolio Management System (PMS) to improve application processing, reduce manual effort and make large PMS tables easier to navigate.

The key goals of this release are to:

- Provide participants the option to automatically remove invalid NMIs from in-flight applications during overnight processing.
- Allow participants to enable automatic declassification for all valid groups in a selected portfolio in one step, rather than updating each group individually.
- Improve application re-upload behaviour by running NMI validation before participants can continue with the application workflow.
- Move application export to the opened application so exported data applies only to the application currently being viewed.
- Improve performance for large PMS datasets by loading records page by page and supporting full dataset searches.
- Improve table navigation across PMS views with sticky column headers and horizontal scrolling for wide tables.

4.2 High-level changes

Function	Description	Reference
PMS Interface	Added automatic invalid NMI removal, automatic declassification enablement for all groups, updated re-upload validation behaviour, application-level export, performance improvements and table navigation improvements	Markets Portal

5 PMS Interface

5.1 Automatic invalid NMI removal

This release simplifies how participants manage invalid National Metering Identifiers (NMIs) in applications. Invalid NMIs are NMIs that are not yet classified but are included in an in-flight application. NMIs can become invalid when market data changes overnight. For example, a NMI may transfer to a different Financially Responsible Market Participant (FRMP), causing the NMI to fail validation.

You can now enable automatic removal of invalid NMIs from in-flight applications, without using CSV uploads. When automatic removal is enabled, PMS checks the application during the overnight processing cycle. If PMS identifies any newly invalid NMI(s), it automatically removes them from the application. This reduces the need for participants to review and manually remove invalid NMIs from the Invalid NMIs tab.

Automatic removal applies only to NMIs that become invalid during the application assessment process. For example, a NMI may become invalid if market data changes and the participant is no longer the Financially Responsible Market Participant (FRMP) for that NMI.

When PMS automatically removes an invalid NMI:

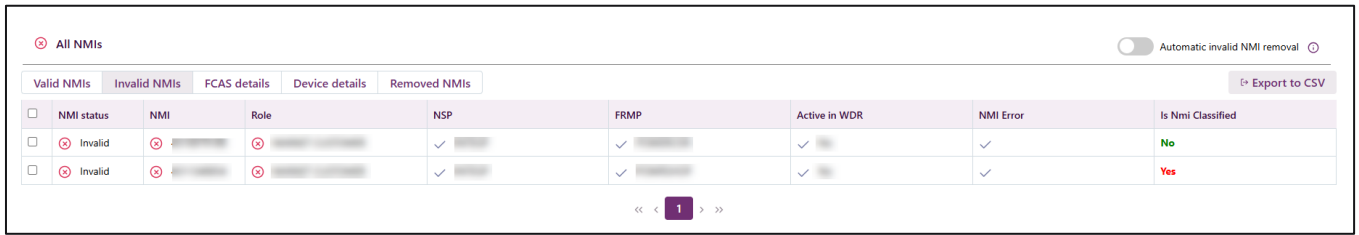
- The NMI is removed from the application
- The removed NMI appears in the **Removed NMIs** tab
- An automated email is sent to you about the NMI(s) removed from your application

You can enable automatic removal when an application is in **draft** or **initial assessment**. If automatic removal is not enabled, participants must continue to remove invalid NMIs manually before the application can move to **pending decision** or be **approved**.

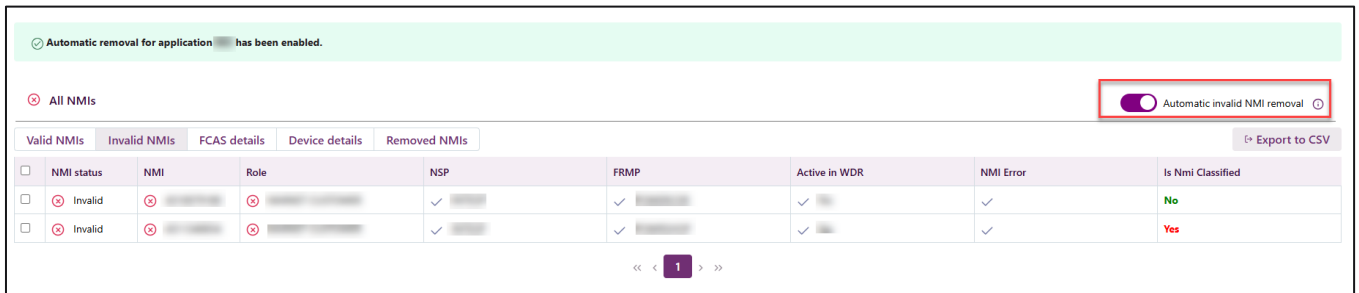
PMS blocks an application from moving to pending decision or approved if invalid NMIs remain in the application. This applies whether participants use manual removal or automatic removal.

To enable automatic removal of invalid NMIs:

1. Navigate to the **Applications** screen
2. Scroll down to the **All NMIs** section.



3. Toggle the **Automatic invalid NMI removal** option.



4. When automatic removal is enabled, PMS considers an invalid NMI for automatic removal when:

- a. The NMI is marked as invalid
- b. The invalid reason is not related to attribute errors

5. Participants will receive automated emails in the following scenarios:

- When an invalid NMI is removed from the application.
- When removal of an invalid NMI causes the aggregate capacity of the group to fall below the required threshold

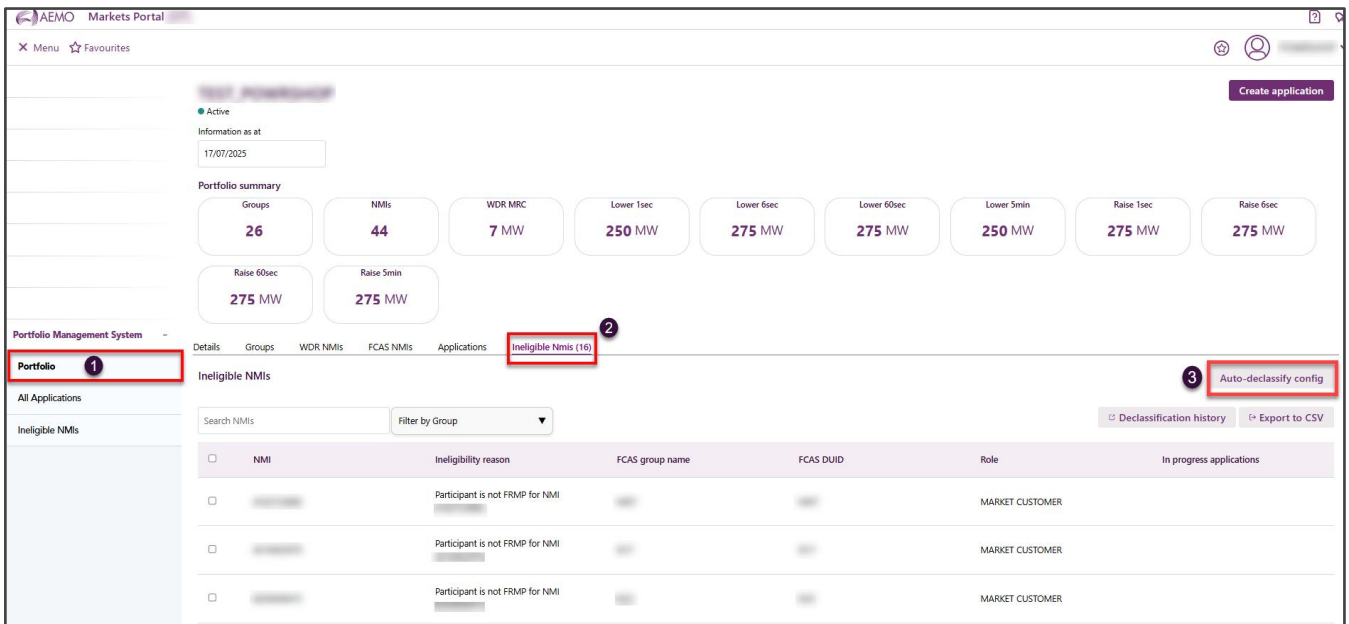
5.2 Automatic declassification configuration

This release adds an **Enable for all** option to the Automatic declassification configuration screen in PMS. You can use this option to enable automatic declassification for all groups in a selected portfolio in one step. This removes the need to update each group individually.

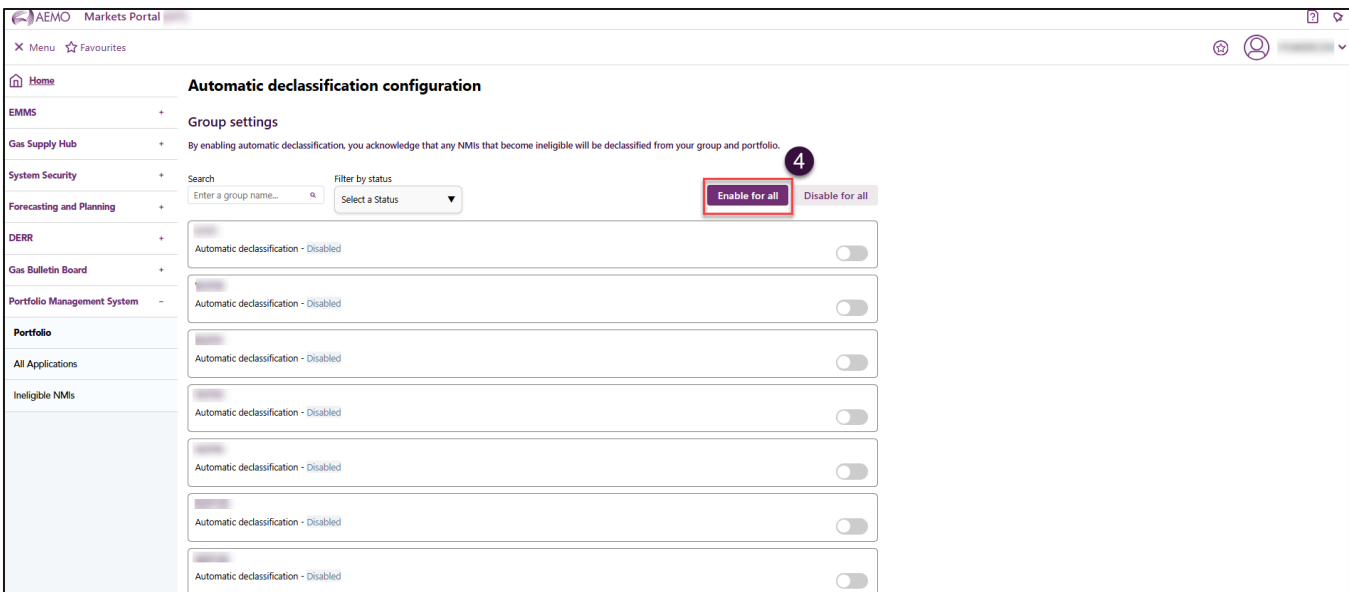
To enable automatic declassification for all groups in a portfolio:

1. Open the **Portfolio** screen.
2. Select the **Ineligible NMIs** tab.

3. Click the **Auto-declassify config**



4. On the configuration page, select **Enable for all**.



PMS applies the updated configuration during the next overnight batch process.

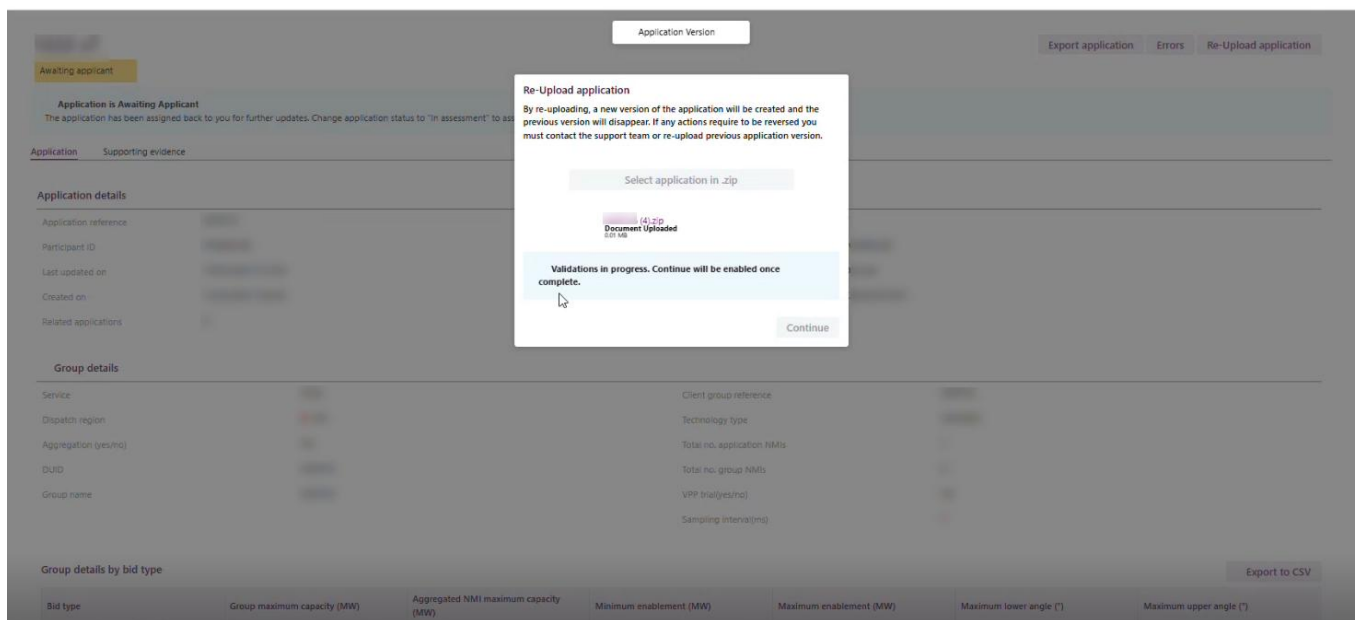


5.3 Re-upload application behaviour

When you re-upload an application, PMS validates the uploaded NMIs before the application can continue.

After a successful re-upload:

- PMS starts a new validation process.
- A pop-up shows that validation is in progress
- NMI validation runs in the background. You can leave the application screen during validation.
- The **Continue** button is only enabled once the validation is complete.



Previously, the Continue button was available immediately while validation continued in the background.

5.4 Export application data

This release changes where you export application data in PMS. You can now export data from within an opened application, so the export applies only to the application you are viewing.

To export an application you must:

1. Open the relevant application in PMS

The screenshot shows the AEMO Markets Portal interface. On the left is a navigation menu with categories like Home, EMMS, Gas Supply Hub, System Security, Forecasting and Planning, DERR, Gas Bulletin Board, and Portfolio Management System. The main content area shows a 'Portfolio summary' with various metrics and a table of 'Applications (394)'. A red box highlights the 'Applications (394)' link in the navigation bar, and another red box highlights the first row of the table, which contains the following data:

Status	Application ID	Service	DUID	Participant ID	Last updated on	Last updated by
Awaiting applicant	1222					

2. Select Export application

The screenshot shows the details of application 1222 v3. The application status is 'Awaiting applicant'. A blue banner indicates 'Application is Awaiting Applicant' with the note: 'The application has been assigned back to you for further updates. Change application status to "In assessment" to assign it to AEMO for further assessment'. Below this, there are sections for 'Application details' and 'Group details'. A red box highlights the 'Export application' button in the top right corner of the application details section.



The export applies only to the currently opened application. PMS does not export data for applications listed on the Group screen or elsewhere in PMS.

5.5 Performance improvements

This release improves how PMS loads large datasets. Previously, some PMS tables loaded all available records at once. This caused slower load times and reduced responsiveness when tables displayed large datasets.

PMS now loads records page by page, so you can move through records more efficiently.

This change applies to the following screens:

- All tabs under the **Portfolio** menu, except the **Details** tab
- All tabs in the **All Applications** menu

5.5.1 Paged loading

PMS displays 20 records on each page. PMS loads more records when you move to the next page.

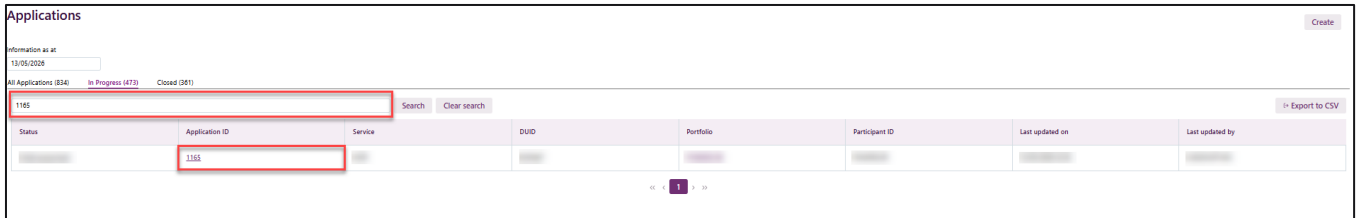
Status	Application ID	Service	DUID	Portfolio	Participant ID	Last updated on	Last updated by
Draft		WDR					
Initial assessment		WDR					
Initial assessment		WDR					
Awaiting applicant		FCAS					
Draft		WDR					
Awaiting applicant		FCAS					
Awaiting applicant		WDR					
Draft		WDR					
Awaiting applicant		FCAS					
Draft		FCAS					
Awaiting applicant		FCAS					
Initial assessment		FCAS					
Final assessment		WDR					
Awaiting applicant		FCAS					
Initial assessment		WDR					
Initial assessment		WDR					
Initial assessment		WDR					
Awaiting applicant		WDR					
Final assessment		FCAS					
Initial assessment		FCAS					

5.5.2 Current page filtering

The search field now filters only the records displayed on the current page. It does not search records across all pages.

For example, if you are on page 1, the search field filters only the records displayed on page 1. If there are no matching records on that page, PMS displays no results.

To search across the full dataset, enter a search term and select **Search**. See [Full dataset search](#).

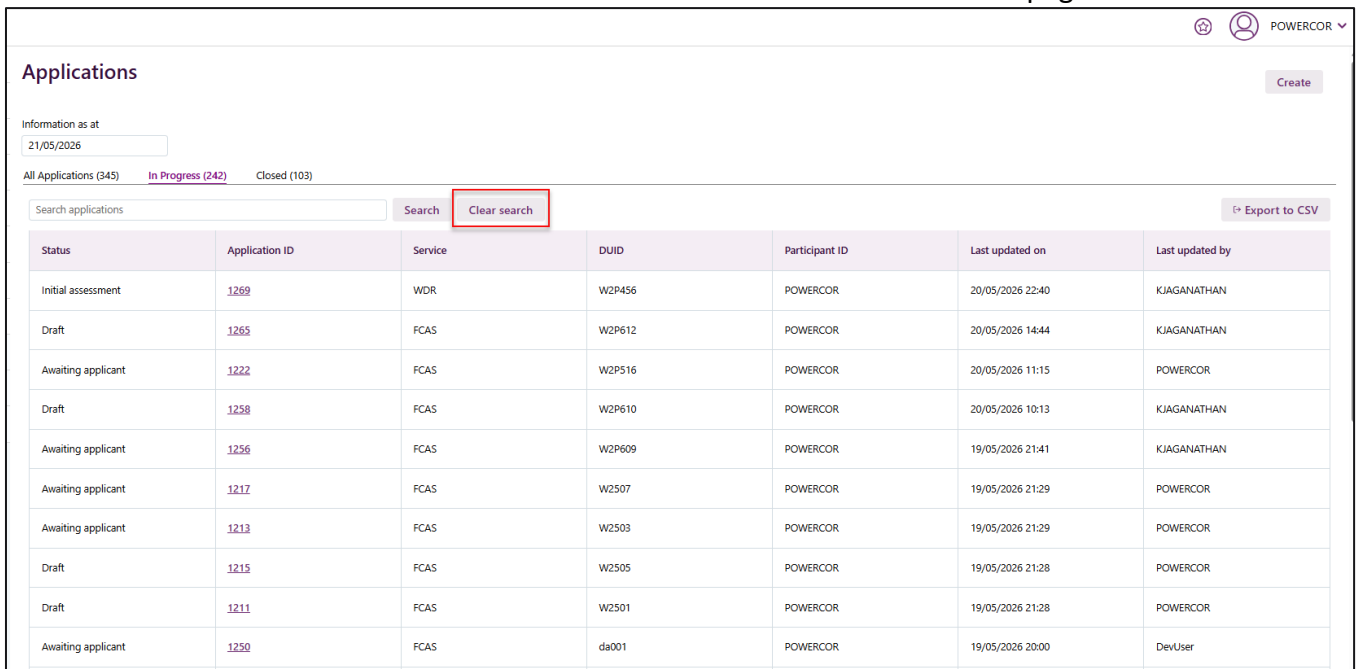


5.5.3 Full dataset search

When you enter a search term and select **Search**, PMS searches the full dataset. PMS displays matching results in the table.



Select **Clear search** to remove text from the search field and return to the first page of the dataset.





5.6 Table navigation improvements

This release improves how large PMS tables display information in the Markets Portal. These changes help you review large and wide datasets without losing table context. The improvement applies to the following PMS views:

- All tabs under the **Portfolio** menu, except the **Details** tab
- All tabs in the **All Applications** menu
- The **Ineligible NMIs** menu

5.6.1 Sticky column headers

Column headers remain visible when you scroll vertically through large PMS tables. This helps you track the information in each column while reviewing long lists of groups, DUIDs, FCAS NMIs, or WDR NMIs.

Search NMIs													
Search NMIs		Search	Clear search		Assess PoL			Mark NMI compliant		Mark NMI non-compliant		Export to CSV	
<input type="checkbox"/>	NMI	Services	WDR DUID	FCAS DUID	WDR NMI MRC (MW)	TNI code	TNI region	Baseline eligibility	NSP	FRMP	Participant ID	In progress applications	NMI status
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	
<input type="checkbox"/>	WDR	WDR										0	

5.6.2 Horizontal scrolling

PMS tables with more columns than can fit on the screen now support horizontal scrolling. You can move left or right across wide tables when reviewing records with many fields. The table scrolls horizontally and keeps the first column fixed. You can also use the mouse scroll wheel to move

FAQs

6 FAQs

TBC



7 Implementation

7.1 Transition

There is no transition required for this release.

7.2 Upgrading

There is no upgrade required for this release.

7.3 Implications

N/A

7.4 Risks

TBC



8 Terms

8.1 Rules Terms

You can find the following terms defined in the [National Electricity Rules \(NER\)](#)

Term
AEMO
AEMO Markets Portal
AEMO Website
Allocated Units
APA
Auction
Auction Participant
Auction Rules
Average cancellation price
Average purchase price
Bid File
Cancelled Units
Cancelled volume
Cash Security
Confidential Information
Directional interconnector
Linked Bid
Market Clearing Price
Market Participants
Maximum Units

8.2 Glossary

You can find a full list of AEMO glossary terms in [Industry Terminology](#) on AEMO's website.

Abbreviation/Term	Explanation
EMMS	Electricity Market Management System; software, hardware, network and related processes to implement the wholesale energy market
FCAS	Frequency Control Ancillary Services
FRMP	Financially Responsible Market Participant
MSUG	Market Systems User Group
NER	National Electricity Rules
NMI	National Metering Identifier
PMS	Portfolio Management System
Release	EMMS – Portfolio Management System – August 2026
Release Dates	Pre-production: TBC Production: 26 August 2026 (TBC)
TBC	To be confirmed
WDR	Wholesale Demand Response

9 References

Application guide [Guide for Demand Response Service Provider - NEM - change or classify new Wholesale Demand Response Units](#)

Application Guide [Guide for Market Customers and Integrated Resource Provider - NEM - change or classify new Non-Scheduled - Ancillary Service Unit](#)

Application guide [Guide to Registering as a Demand Response Service Provider in the NEM](#)

Guidelines [Wholesale Demand Response Participation Guidelines](#)

Policy document [WDRM - Baseline Eligibility Compliance and Metrics Policy](#)

Specification [Market Ancillary Services Specification and FCAS Verification Tool](#)

Application guide [Register as a Customer or Integrated Resource Provider in the NEM](#)

Application guide [Register as a Generator in the NEM](#)

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A1. Version history

No version history, this is the initial draft release.