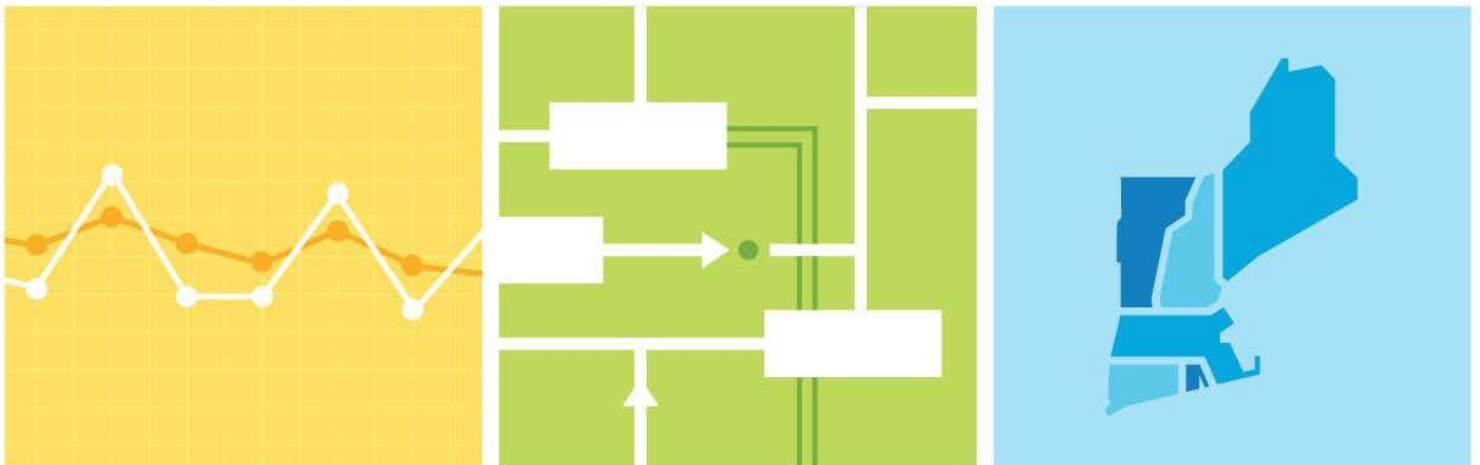




Demand Resource Audit and Testing Tool (A&TT) User Guide

© ISO New England Inc.
Asset Registration and Auditing Dept.
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ISO-NE PUBLIC



About this user guide

The Demand Resource Audit and Testing Tool (A&TT) User Guide is grouped into two main resource sections. Demand Response Resource Audits (Active) and Seasonal Peak and On Peak Demand Capacity Resource Audits (Passive). This guide details the system supporting the auditing process. This guide is not intended to be read from beginning to end, but rather to be used as a tool and a reference when the user needs a refresher or tries to do something new.

You may:

- Select a topic from the [How to:](#) list on page 8.

CAUTION

- ❖ Company names and any numerical values are fictitious and not to be associated with any actual market customer.
- ❖ Though we strive to maintain this guide current, the screen shots in this guide may not fully reflect the current production environment.
- ❖ Do not rely only on this user guide for information or requirements regarding demand resources and assets registration or market participation as the Market Rule and Manuals serve that function.
- ❖ Please consult:
 - the *ISO New England Inc. Transmission, Markets and Services Tariff* (“Tariff”) at:
<http://www.iso-ne.com/regulatory/tariff/index.html>:
 - Section I – General Terms and Conditions
 - Section I.2.2 – Definitions
 - Section III – Market Rule 1
 - Section III.13 – Forward Capacity Market
 - the relevant *ISO New England Manuals* at:
http://www.iso-ne.com/rules_proceeds/isone_mnls/index.html:
 - **M-RPA** Registration and Performance Auditing
 - **M-MVDR** Measurement and Verification of Demand Reduction Value from Demand Resources
 - **M-20** Forward Capacity Market (FCM)
 - **M-28** Market Rule 1 Accounting
 - ISO New England Operating Procedures at:
http://www.iso-ne.com/rules_proceeds/operating/index.html
 - ISO New England Planning Procedures at:
http://www.iso-ne.com/rules_proceeds/isone_plan/index.html
 - ISO New England training materials at:
<http://www.iso-ne.com/support/training/courses/index.html>

Change Summary

Revision	Date	Comments
Version 1.0	March 15, 2013	Initial release
Version 1.1	June 24, 2013	New demand response asset audit information added. Section 6 - Reference Tables, removed as the information contained therein is available in the Customer & Asset Management System (CAMS) user guides.
Version 2.0	April 23, 2018	Updated for Price Response Demand effective June 1, 2018.
Version 2.1	June 29, 2018	Correction made to Claim 10/Claim 30 audit request instructions.
Version 2.2	June 16, 2022	Change to On-Peak and Seasonal Peak Demand Resource Audit request submittal (section 4.2.3)

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1 Overview of DR Audit and Testing Tool

The Demand Resource Audit and Testing Tool (A&TT) is ISO New England's (ISO-NE) auditing and tracking tool for demand resources. It facilitates the process of auditing demand resources. A&TT is used for the submittal, scheduling (by ISO New England), and management of audits including the approval of audit results and the dissemination of results information at the demand asset level.

Auditing of demand resources by ISO New England verifies or establishes the actual or expected performance values of demand resources that are used in different processes within ISO New England.

The Asset Registration and Auditing (ARA) group in ISO New England is responsible for monitoring and tracking the performance of resources and assets. Demand resources have different auditing needs depending on where they are in the process or "lifecycle" of a resource. A lead market participant must utilize A&TT to request the audit of a demand resource; ARA in turn utilizes A&TT to manage the auditing process, from approval of a request through publishing of the audit results.

Customers are encouraged to review the relevant governing language prior to utilizing A&TT to request audits. These provisions are primarily found in the Tariff.

A&TT is available to customers as an internet-based tool for:

- Managing audit requests
- Viewing the corresponding audit results
- Supporting business processes and workflows associated with demand resources

2 How to:

2.1 Get Started



2.1.1 CAMS Security Administrators (SAs)

- Access to A&TT is managed through the Customer and Asset Management System (CAMS).
- Your company's SA is responsible for assigning roles per your company's internal procedures and controls.
- The SA is also responsible for issuing digital certificates to users, as required (e.g., a customer may already have a digital certificate if they already have access to another ISO SMD application).
- For details on managing access, SAs can refer to the "CAMS User Guide for Digital Certificates" which is available by contacting ISO-NE Participant Support.

2.1.2 Accessing A&TT

- **I do not have an A&TT role or have not installed a digital certificate. How do I access A&TT?**

Contact your company's CAMS Security Administrator (SA) to request access to A&TT or to install a digital certificate.

- To learn who at your company is an SA, contact ISO New England Participant Support at (413) 540-4220 or via email at AskISO@iso-ne.com.

2.1.3 A&TT Access Roles

- Lead Participant Maintainer
 - Allows the lead participant to assign users who can view, submit, and edit audit request and review audit results information
- Lead Participant Read Only
 - Allows the lead participant to assign users who can view the relevant audit request and audit results data
- Demand Designated Entity (DDE) Read only
 - Allows the DDE of a demand resource to view pertinent audit request and results information in support of their role as the DDE for the resource

A&TT Access Roles	LP Maintainer	LP Read Only	DDE Read Only
Dashboard	X	X	X
Capacity Resources	X	X	X
Demand Response Resources	X	X	X
Assets	X	X	X
Audit Requests Update & Cancel	X		
Audit Requests View	X	X	X

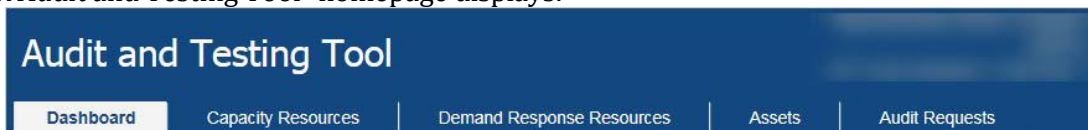
- **I have an A&TT role and have installed my digital certificate. How do I access A&TT?**
 1. Navigate to the ISO SMD Applications Home Page at: <https://smd.iso-ne.com/>

2. Click on “**DR Audit and Testing Tool**”. (The exact location of the button varies depending on the applications that have been granted to you.)

The screenshot shows the 'SMD Applications Home Page' with a navigation breadcrumb 'Market System → SMD Applications Home Page'. Below the header is a grid of 20 application buttons arranged in two columns. The button for 'DR Audit and Testing Tool' is highlighted with a white border.

SMD Applications Home Page	
Internal Transactions	External Transactions
Bids & Offers (Registered Users)	Customer and Asset Management System
Financial Transmission Rights (Registered Users)	Forward Reserve Market Auction
Submit Meter Reading	CROW Outage Scheduler
Submit Peak Contribution	Forward Reserve Assignment
Submit Monthly Regional Network Load	Forward Capacity Tracking System
Financial Assurance Management	Forward Capacity Market Reconfiguration Auction
Forward Capacity Market CSO Bilateral Contracts	Supplemental Availability Designation
Demand Resource Market User Interface	DR Audit and Testing Tool
Claimed Capability Auditing Tool	NX Application (NX-9, NX-12D and One-Line Diagrams)
Energy Efficiency Measure Database	Ask ISO
Dynamic Data Management System	

The “DR Audit and Testing Tool” homepage displays:



Display may vary depending on your role.

3. See the “How to:” list on page 8 for details on the task you want to perform.

To get an A&TT role and digital certificate:

1. Contact your company’s CAMS Security Administrator (SA) to request access to A&TT.
 - a. To learn who at your company is an SA, contact ISO New England Participant Support at (413) 540-4220 or via email at AskISO@iso-ne.com.
2. Your SA will assign you at least one specific role in A&TT. See the “A&TT Roles” [section 6](#) for details of each A&TT role.
3. Your SA will issue you a digital certificate if you do not already have one.
4. ISO New England will email you instructions for installing the certificate on your computer.
 - a. See *Install your Digital Certificate* in the “CAMS User Guide for Digital Certificates” which is available by contacting ISO-NE Participant Support or your SA.
 - b. You will need the “PIN #” or “Pickup Password” from your SA to complete the installation process.
5. After you have installed your digital certificate, go to the “[Accessing A&TT](#)” section on page 8.

IMPORTANT

- ❖ It may take up to two hours for the system to implement a new A&TT role.

2.1.4 A&TT user interface



The A&TT user interface is divided by tabs. The access role the individual user has will determine the default view and available tabs. The display may be different depending on the user's role.

Dashboard:

View Demand Response Resource (DRR), On-Peak, and Seasonal Peak Demand Resource audit requests that are not in an end state

Capacity Resources:

Search Seasonal Peak and On-Peak Demand Resources

- Request Seasonal Peak and On-Peak Demand Resource audits
- Cancel audit requests
- View capability history
- View mapped assets

Search Active Demand Capacity Resources (ADCR)

- View capability history
- View mapped DRRs

Demand Response Resources:

Search DRRs

- Request DRR audits (Seasonal and/or Claim 10/30)
- View capability history
- View mapped Demand Response Assets (DRAs)

Assets:

Search assets and view audit history of assets

Audit Requests:

Search audit requests

View audit status and results

Cancel audit requests

2.1.5 General features of A&TT

1. All menu selections are based on your individual A&TT access role or roles in CAMS.
2. Menus and functionality that do not pertain to your role(s) will not be displayed.
3. Many of the data grids are downloadable. When they are, users will see a “CSV Export” button below the data grid.
4. Columns are sortable.
5. Results are paginated when they exceed a certain number of rows. Users may note the number of items that are displaying and how many pages are available in the bottom portion of the grid.
6. A&TT keeps a history of each change to the following:
 - audit requests
 - demand asset audit results
7. Lead Market Participants (LP) can only view historical audit information for assets and resources for which they were the effective LP at the time of record.

3 Demand Response Resources (DRR):

3.1 DRR audit request overview

Audit requests can only be made by a Lead Market Participant, or in certain cases noted in the Tariff, by ISO New England, to demonstrate the demand reduction value of a DRR.

- Seasonal: audit to fulfill winter or summer Seasonal DR Audit requirements.
- Claim 10/30: for real-time reserve and performance factor calculations.
- Seasonal and Claim 10/30: Dispatch meeting requirements of both previously mentioned audits.

Request audit(s) from the “Demand Response Resources” tab.

- The submitter of the audit request must be the Lead Market Participant of that resource as of the “Request Date” and “Audit Window Start Time” of the request.
- Lead Market Participants can submit an audit request of a single DRR or multiple DRRs. If multiple DRRs are selected, then each will have its own unique audit request.
- If an audit request is Pending or Scheduled, you cannot request another audit for the DRR.
- A comment may optionally be added. If multiple DRRs were selected this comment will be visible on all audit requests.

3.1.1 States of DRR audit requests

A request progresses through several states as it goes through the auditing process. The Dashboard in A&TT allows a Lead Market Participant to see audit request status:

- Cancelled: the customer or the ISO cancels the audit request, the audit window has passed and the audit has not been scheduled, or a past dispatch period was chosen that did not contain 12 valid intervals.
- Pending: a request has been received by the ISO and it has not been rejected.
- Scheduled: an audit is scheduled for an undisclosed time.
- Dispatch Received: ISO initiated the dispatch of a DRR.
- Dispatch Ended: post-audit status for the remainder of a dispatch day.
- Waiting for Dispatch Data: the 1 ½-day period following the dispatch day in which data corrections can be submitted.
- Initial Review in Progress: begins after data correction deadline.
- Initial Review Complete: reflects when all assets are placed in either an Approved or a Deferred state by ISO.
- Final Review In-Progress: begins after data re-submittal deadline.
- Complete: all data reconciliation data has been received, the baselines and corresponding interruption MWs have been recalculated as appropriate, and the ISO has finalized its determination of the contribution each DRA made during an audit to its associated DRR. The asset result states at this stage are either Failed or Approved.

3.2 Manage DRRs

3.2.1 Display DRR audit requests

- Roles this applies to:
 - Lead Participant Maintainer
 - Lead Participant Read Only
 - Demand Designated Entity Read Only
1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section.
 2. The “Dashboard” screen displays:

The screenshot shows the 'Audit and Testing Tool' interface. The top navigation bar includes 'Dashboard', 'Capacity Resources', 'Demand Response Resources', 'Assets', and 'Audit Requests'. The 'Dashboard' tab is selected. Below the navigation bar, the 'Pending Audits' section displays a table with the following data:

Request ID	Window Start	Window End	Audit Type	Capacity Resource Name (ID)	Demand Response Resource Name (ID)	Capacity Resource Type	Audit Source	Audit Status	Market Participant Name (ID)	Actual Audit Date
89191	03/19/2018	03/26/2018	Claim 10/Claim 30		ZSEMA013 (60818)		CUSTOMER	PENDING	Testing Customer (128728)	

Navigation controls at the bottom of the table include a page indicator showing '1' and a 'CSV Export' button. The status 'Displaying 1 to 1 of 1' is shown at the bottom right.

By default, the “Dashboard” is displayed when accessing A&TT.

3.2.2 Search DRRs

1. Select “Demand Response Resources” tab, search screen displays.
2. Select search criteria or use defaults.
3. Click DRR ID hyperlink for details.

The screenshot shows the 'Demand Response Resource Search' screen. The top navigation bar includes 'Dashboard', 'Capacity Resources', 'Demand Response Resources', 'Assets', and 'Audit Requests'. The 'Demand Response Resources' tab is selected. Below the navigation bar, the search criteria are displayed:

As Of Date*	Demand Response Resource Name (ID)	Demand Response Resource Status	Load Zone Name	Market Participant Name (ID)
03/15/2018	<input type="text" value="autocomplete"/>	OPERATIONAL	<input type="text" value="autocomplete"/>	<input type="text" value="autocomplete"/>

Additional search criteria include 'Dispatch Zone Name' (Western MA), 'Aggregation Zone Name', 'Reserve Zone Name', and 'Designated Entity Name (ID)'. A 'Search' button is located to the right of the search criteria.

Below the search criteria, the 'Request Audit(s)' section displays a table with the following data:

Request Audit(s)	DRR ID	DRR Name	Last Winter Audit	Last Summer Audit	Market Participant Name (ID)	Load Zone Name (ID)	Aggregation Zone Name (ID)
<input type="checkbox"/>	60840	ZWMA029	03/01/2018	04/20/2018	Testing Customer (128728)	West/Central Mass (WCMA) (4007)	DR_MA_Western (7618)
<input type="checkbox"/>	60859	ZWMA03C	02/20/2018	04/20/2018	Testing Customer (128728)	West/Central Mass (WCMA) (4007)	DR_MA_Western (7618)
<input type="checkbox"/>	60862	ZWMA053	01/20/2018	04/20/2018	Testing Customer (128728)	West/Central Mass (WCMA) (4007)	

Navigation controls at the bottom of the table include a page indicator showing '1' and a 'CSV Export' button. The status 'Displaying 1 to 3 of 3' is shown at the bottom right.

4. “Demand Response Resource Details” screen displays:

Demand Response Resource Details

As Of: 03/15/2018

Demand Response Resource Name (ID): ZWMA03C (60859)

Capacity Resource Name (ID): Demand Capacity Resource 2170 (37944)

Aggregation Zone Name (ID): DR.MA_Western (7618)

Current Summer Audit Value: 0.333

Current Winter Audit Value: 0.150

Summer Effective Date: 01/01/2018

Winter Effective Date: 02/21/2018

Market Participant Name (ID): Testing Customer (128728)

Designated Entity Name (ID): Testing Customer (128728)

Capability History | Mapped Assets

Effective	Season	Value MW	Audit Request ID	Audit Date	Expires	Status
01/01/2018	SUMMER	0.333	88994	04/20/2018		COMPLETE
02/21/2018	WINTER	0.150	89126	02/20/2018		INITIAL_REVIEW_COMPLETE

CSV Export

Displaying 1 to 2 of 2

Demand Response Resource Details

As Of: 03/20/2018

Demand Response Resource Name (ID): ZWMA03C (60859)

Capacity Resource Name (ID): Demand Capacity Resource 2170 (37944) [link to ADCR details](#)

Aggregation Zone Name (ID): DR.MA_Western (7618)

Current Summer Audit Value: 0.333

Current Winter Audit Value: 0.150

Summer Effective Date: 01/01/2018

Winter Effective Date: 02/21/2018

Market Participant Name (ID): Testing Customer (128728)

Designated Entity Name (ID): Testing Customer (128728)

Capability History | Mapped Assets

Effective	Season	Value MW	Audit Request ID	Audit Date	Expires	Status
01/01/2018	SUMMER	0.333	88994	04/20/2018		COMPLETE
02/21/2018	WINTER	0.150	89126	02/20/2018		INITIAL_REVIEW_COMPLETE

CSV Export

Displaying 1 to 2 of 2

Demand Response Resource Details

As Of: 03/20/2018

Demand Response Resource Name (ID): ZWMA03C (60859)

Capacity Resource Name (ID): Demand Capacity Resource 2170 (37944)

Aggregation Zone Name (ID): DR.MA_Western (7618)

Current Summer Audit Value: 0.333

Current Winter Audit Value: 0.150

Summer Effective Date: 01/01/2018

Winter Effective Date: 02/21/2018

Market Participant Name (ID): Testing Customer (128728)

Designated Entity Name (ID): Testing Customer (128728)

Capability History | Mapped Assets

ID	Name	MIC
60241	The Dailey Planet	0.200
60409	Bailey Savings and Loan	0.800
60424	My Cousin Vinnie's Pizzeria	0.075
60425	Animal House	0.075
60435	Little Shop of Horrors	0.075
60436	The Firm	0.075
60470	Martin and Lewis Inc	0.400

CSV Export

Displaying 1 to 7 of 7

3.2.3 Submit an Audit Request – Seasonal to be dispatched

“Demand Response Resources” tab

- Role this applies to:
 - Lead Participant Maintainer
1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section.
 2. The “Dashboard” screen displays.
 3. Click on the “Demand Response Resources” tab.
 4. The “Demand Response Resource Search” screen displays:

The screenshot shows the 'Demand Response Resource Search' form. The 'As Of Date' is set to 03/27/2018. The 'Demand Response Resource Name (ID)' field has an autocomplete dropdown. The 'Demand Response Resource Status' is set to OPERATIONAL. The 'Load Zone Name' is set to a dropdown menu. The 'Market Participant Name (ID)' field has an autocomplete dropdown. The 'Dispatch Zone Name', 'Aggregation Zone Name', and 'Reserve Zone Name' are dropdown menus. The 'Designated Entity Name (ID)' field has an autocomplete dropdown. A 'Q Search' button is located on the right side of the form.

5. Either enter specific resource information as your search criteria or use the default criteria, and then click the “Search” button.
6. The list of DRRs displays:

The screenshot shows the search results for Demand Response Resources. The search criteria are: As Of Date: 03/15/2018, Demand Response Resource Name (ID): autocomplete, Demand Response Resource Status: OPERATIONAL, Load Zone Name: dropdown, Market Participant Name (ID): autocomplete. The results table is as follows:

Request Audit(s)	DRR ID	DRR Name	Last Winter Audit	Last Summer Audit	Market Participant Name (ID)	Load Zone Name (ID)	Aggregation Zone Name (ID)
<input type="checkbox"/>	81136	ZCTMAGAD			Testing Customer (128728)	West/Central Mass (WCMA) (4007)	
<input type="checkbox"/>	80845	ZECT02E	01/20/2018	04/20/2018	Testing Customer (128728)	CT (4004)	DR_CT_Eastern (7600)
<input type="checkbox"/>	80802	ZLSMA003	02/27/2018	04/20/2018	Testing Customer (128728)	SEMA (4006)	DR_MA_Lower_SEMA (7612)
<input type="checkbox"/>	80890	ZME03D	01/20/2018	04/20/2018	Testing Customer (128728)	ME (4001)	DR_ME_Maine (7606)
<input type="checkbox"/>	80873	ZMED4A	01/20/2018	04/20/2018	Testing Customer (128728)	ME (4001)	
<input checked="" type="checkbox"/>	80847	ZNEWH03D	01/20/2018	04/20/2018	Testing Customer (128728)	NH (4002)	DR_NH_New_Hampshire (7610)
<input type="checkbox"/>	80877	ZNSHR04E	01/20/2018	04/20/2018	Testing Customer (128728)	NEMA (4008)	
<input type="checkbox"/>	80879	ZNWVT050	02/02/2018	04/20/2018	Testing Customer (128728)	VT (4003)	
<input type="checkbox"/>	81180	ZRI088			Testing Customer (128728)	RI (4005)	DR_RI_Rhode_Island (7619)
<input type="checkbox"/>	80818	ZSEMA013	01/20/2018	04/20/2018	Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	80900	ZSEMA05D			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	81059	ZSEMA088	03/14/2018		Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	81183	ZSEMA0B9			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	81178	ZSEMA0BE			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	81227	ZSEMA0CA			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	81239	ZSEMA0CE			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	81243	ZSEMA0DD			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	81133	ZSFLD0AB			Testing Customer (128728)	West/Central Mass (WCMA) (4007)	DR_MA_Springfield (7617)
<input type="checkbox"/>	80856	ZVT039	01/20/2018	04/20/2018	Testing Customer (128728)	VT (4003)	DR_VT_Vermont (7615)
<input type="checkbox"/>	80840	ZWMA029	03/01/2018	04/20/2018	Testing Customer (128728)	West/Central Mass (WCMA) (4007)	DR_MA_Western (7618)

7. Select check box(s) of DRR(s) to audit, click “Request Audit(s)” button.

8. The “Create Demand Response Resource (DRR) Audit Request” screen displays:

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | **Demand Response Resources** | Assets | Audit Requests

Create Demand Response Resource (DRR) Audit Request

Audit Type* Post Dispatch Audit* Audit Window Start* Dispatch Event Start* : : min

Resources

Name (ID)	Current Summer Audit Value (MW)	Earliest Summer Audit Expiration	Current Winter Audit Value (MW)	Earliest Winter Audit Expiration
ZNEWH030 (60847)	1.732	01/01/2018	1.309	01/01/2018

Comment
optional

9. Select “Audit Type”: Seasonal.
10. Select “Post-Dispatch Audit”: No.
11. A Comment may optionally be added.
12. Click “Create Audit Request” button.

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | **Demand Response Resources** | Assets | Audit Requests

Create Demand Response Resource (DRR) Audit Request

Audit Type* Post Dispatch Audit* Audit Window Start* Dispatch Event Start* : : min

Resources

Name (ID)	Current Summer Audit Value (MW)	Earliest Summer Audit Expiration	Current Winter Audit Value (MW)	Earliest Winter Audit Expiration
ZNEWH030 (60847)	1.732	01/01/2018	1.309	01/01/2018

Comment
|

13. The “Demand Response Resource Search” screen displays with message “Successfully added (1 or more) Demand Response Resource Audit Requests”

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | **Demand Response Resources** | Assets | Audit Requests

Demand Response Resource Search

Successfully added 1 Demand Response Resource Audit Requests

As Of Date* Demand Response Resource Name (ID) Demand Response Resource Status Load Zone Name Market Participant Name (ID)

Dispatch Zone Name Aggregation Zone Name Reserve Zone Name Designated Entity Name (ID)

14. Select “Dashboard” tab to display pending audit requests.

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | Demand Response Resources | Assets | **Audit Requests**

Pending Audits

Request ID	Window Start	Window End	Audit Type	Capacity Resource Name	Demand Response Resource Name (ID)	Capacity Resource Type	Audit Source	Audit Status	Market Participant Name (ID)	Actual Audit Date
89188	03/16/2018	03/23/2018	Seasonal	ZNEWH030 (60847)		CUSTOMER	PENDING	Testing Customer (128728)		

Displaying 1 to 1 of 1

15. Click “Request ID” link to display “Audit Request Details” screen.

3.2.4 Submit an Audit Request – Past Dispatch

- Role this applies to:
 - Lead Participant Maintainer

 1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section.
 2. The “Dashboard” screen displays.
 3. Click on the “Demand Response Resources” tab.

DRR ID	DRR Name	Last Winter Audit	Last Summer Audit	Market Participant Name (ID)	Load Zone Name (ID)	Aggregation Zone Name (ID)
<input type="checkbox"/>	61136 ZCTMADAD			Testing Customer (128728)	West/Central Mass (WCMA) (4007)	
<input type="checkbox"/>	60845 ZECT02E	01/20/2018	04/20/2018	Testing Customer (128728)	CT (4004)	DR_CT_Eastern (7600)
<input type="checkbox"/>	60802 ZLSMA003	02/27/2018	04/20/2018	Testing Customer (128728)	SEMA (4006)	DR_MA_Lower_SEMA (7612)
<input type="checkbox"/>	60860 ZME03D	01/20/2018	04/20/2018	Testing Customer (128728)	ME (4001)	DR_ME_Maine (7606)
<input checked="" type="checkbox"/>	60873 ZMED4A	01/20/2018	04/20/2018	Testing Customer (128728)	ME (4001)	
<input type="checkbox"/>	60847 ZNEWH030	01/20/2018	04/20/2018	Testing Customer (128728)	NH (4002)	DR_NH_New_Hampshire (7610)
<input type="checkbox"/>	60877 ZNSHR04E	01/20/2018	04/20/2018	Testing Customer (128728)	NEMA (4008)	
<input type="checkbox"/>	60879 ZNWT050	02/02/2018	04/20/2018	Testing Customer (128728)	VT (4003)	
<input type="checkbox"/>	61100 ZRI0B8			Testing Customer (128728)	RI (4005)	DR_RI_Rhode_Island (7616)
<input type="checkbox"/>	60818 ZSEMA013	01/20/2018	04/20/2018	Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	60990 ZSEMA05D			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	61059 ZSEMA088	03/14/2018		Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	61103 ZSEMA089			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	61178 ZSEMA08E			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	61227 ZSEMA0CA			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	61239 ZSEMA0CE			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	61243 ZSEMA000			Testing Customer (128728)	SEMA (4006)	DR_MA_SEMA (7613)
<input type="checkbox"/>	61133 ZSFLD0AB			Testing Customer (128728)	West/Central Mass (WCMA) (4007)	DR_MA_Springfield (7617)
<input type="checkbox"/>	60856 ZVT039	01/20/2018	04/20/2018	Testing Customer (128728)	VT (4003)	DR_VT_Vermont (7615)
<input type="checkbox"/>	60840 ZWMA029	03/01/2018	04/20/2018	Testing Customer (128728)	West/Central Mass (WCMA) (4007)	DR_MA_Western (7618)

4. Either enter specific resource information as your search criteria or use the default criteria, and then click the “Search” button.
5. Check DRR(s) to audit.
6. Click “Request Audit(s)” button.
7. The “Create Demand Response Resource (DRR) Audit Request” screen displays.
8. Select “Post-Dispatch Audit”: Yes.
9. Enter “Audit Window Start” date (date of previous dispatch).
10. Enter “Dispatch Event Start” hour of the previous dispatch being selected as an audit.
11. Enter Minute. The 1st five-minute interval to be used for the audit calculation. Audit will be for the 12 intervals following this time. The first interval may be from any point during the dispatch, as long as 12 continuous dispatched intervals follow.

Create Demand Response Resource (DRR) Audit Request

Audit Type: Seasonal | Post Dispatch Audit: Yes | Audit Window Start: 03/12/2018 | Dispatch Event Start: Hour: 18, Minute: 15

Name (ID)	Current Summer Audit Value (MW)	Earliest Summer Audit Expiration	Current Winter Audit Value (MW)	Earliest Winter Audit Expiration
ZME04A (60873)	0.400	01/01/2018	0.256	01/01/2018

Comment: optional

Buttons: Create Audit Request, Back to Search

12. A Comment may optionally be added. If multiple DRRs are selected this comment will appear on all audit requests.
13. Click “Create Audit Request” button.
14. “Demand Response Resource Search” screen displays with message “Successfully added 1 Demand Response Resource Audit Requests.”

Demand Response Resource Search

Successfully added 1 Demand Response Resource Audit Requests

As Of Date: 03/15/2018 | Demand Response Resource Name (ID): autocomplete | Demand Response Resource Status: OPERATIONAL | Load Zone Name: [dropdown] | Market Participant Name (ID): autocomplete

Dispatch Zone Name: [dropdown] | Aggregation Zone Name: [dropdown] | Reserve Zone Name: [dropdown] | Designated Entity Name (ID): autocomplete

Search

15. Select “Dashboard” tab to display pending audit request.

Pending Audits

Request ID	Window Start	Window End	Audit Type	Capacity Resource Name (ID)	Demand Response Resource Name (ID)	Capacity Resource Type	Audit Source	Audit Status	Market Participant Name (ID)	Actual Audit Date
89188	03/16/2018	03/23/2018	Seasonal	ZNEWH030 (60847)			CUSTOMER	PENDING	Testing Customer (128728)	

Buttons: CSV Export, Navigation arrows

Displaying 1 to 1 of 1

3.2.5 Submit an Audit Request – Claim 10/30

- Role this applies to:
 - Lead Participant Maintainer
1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section.
 2. The “Dashboard” screen displays.
 3. Click on the “Demand Response Resources” tab.
 4. Either enter specific resource information as your search criteria or use the default criteria, and then click the “Search” button.
 5. Check DRR(s) to audit.
 6. Click “Request Audit(s)” button.
 7. The “Create Demand Response Resource (DRR) Audit Request” screen displays:

The screenshot shows the 'Audit and Testing Tool' interface. At the top, there are navigation tabs: Dashboard, Capacity Resources, Demand Response Resources (selected), Assets, and Audit Requests. The main content area is titled 'Demand Response Resource Search'. It contains a search form with the following fields:

- As Of Date***: 03/15/2018 (highlighted with a blue box)
- Demand Response Resource Name (ID)**: autocomplete
- Demand Response Resource Status**: OPERATIONAL
- Load Zone Name**: dropdown menu
- Market Participant Name (ID)**: autocomplete
- Dispatch Zone Name**: dropdown menu
- Aggregation Zone Name**: dropdown menu
- Reserve Zone Name**: dropdown menu
- Designated Entity Name (ID)**: autocomplete

A 'Search' button is located to the right of the form. Below the search form is a 'Request Audit(s)' button. Underneath is a table of DRRs with the following columns: DRR ID, DRR Name, Last Winter Audit, Last Summer Audit, Market Participant Name (ID), Load Zone Name (ID), and Aggregation Zone Name (ID). The first row is selected with a checkbox.

DRR ID	DRR Name	Last Winter Audit	Last Summer Audit	Market Participant Name (ID)	Load Zone Name (ID)	Aggregation Zone Name (ID)
<input checked="" type="checkbox"/>	01138 ZCTMADAD			Testing Customer (128728)	WestCentral Mass (WCMA) (4007)	
<input type="checkbox"/>	00845 ZECT02E	01/20/2018	04/20/2018	Testing Customer (128728)	CT (4004)	DR.CT_Eastern (7000)
<input type="checkbox"/>	00802 ZLSMA003	02/27/2018	04/20/2018	Testing Customer (128728)	SEMA (4006)	DR.MA_Lower_SEMA (7012)
<input type="checkbox"/>	00860 ZME03D	01/20/2018	04/20/2018	Testing Customer (128728)	ME (4001)	DR.ME_Maine (7006)
<input type="checkbox"/>	00873 ZME04A	01/20/2018	04/20/2018	Testing Customer (128728)	ME (4001)	
<input type="checkbox"/>	00847 ZNEWH030	01/20/2018	04/20/2018	Testing Customer (128728)	NH (4002)	DR.NH_New_Hampshire (7010)
<input type="checkbox"/>	00877 ZNSHR04E	01/20/2018	04/20/2018	Testing Customer (128728)	NEMA (4008)	
<input type="checkbox"/>	00879 ZNWVT050	02/02/2018	04/20/2018	Testing Customer (128728)	VT (4003)	
<input type="checkbox"/>	01100 ZRI08B			Testing Customer (128728)	RI (4005)	DR.RI_Rhode_Island (7019)
<input type="checkbox"/>	00818 ZSEMA013	01/20/2018	04/20/2018	Testing Customer (128728)	SEMA (4006)	DR.MA_SEMA (7013)
<input type="checkbox"/>	00960 ZSEMA05D			Testing Customer (128728)	SEMA (4006)	DR.MA_SEMA (7013)
<input type="checkbox"/>	01059 ZSEMA088	03/14/2018		Testing Customer (128728)	SEMA (4006)	DR.MA_SEMA (7013)
<input type="checkbox"/>	01103 ZSEMA0B9			Testing Customer (128728)	SEMA (4006)	DR.MA_SEMA (7013)
<input type="checkbox"/>	01178 ZSEMA0BE			Testing Customer (128728)	SEMA (4006)	DR.MA_SEMA (7013)
<input type="checkbox"/>	01227 ZSEMA0CA			Testing Customer (128728)	SEMA (4006)	DR.MA_SEMA (7013)
<input type="checkbox"/>	01239 ZSEMA0CE			Testing Customer (128728)	SEMA (4006)	DR.MA_SEMA (7013)
<input type="checkbox"/>	01243 ZSEMA0DD			Testing Customer (128728)	SEMA (4006)	DR.MA_SEMA (7013)
<input type="checkbox"/>	01133 ZSFLD0AB			Testing Customer (128728)	WestCentral Mass (WCMA) (4007)	DR.MA_Springfield (7017)
<input type="checkbox"/>	00856 ZVTD39	01/20/2018	04/20/2018	Testing Customer (128728)	VT (4003)	DR.VT_Vermont (7015)
<input type="checkbox"/>	00840 ZWMA029	03/01/2018	04/20/2018	Testing Customer (128728)	WestCentral Mass (WCMA) (4007)	DR.MA_Western (7018)

At the bottom of the table, there is a 'CSV Export' button and a page indicator 'Displaying 1 to 20 of 22'.

8. Select “Audit Type”: Claim 10/Claim 30.
9. Select “Post Dispatch Audit”: No.
10. Select “Audit Window Start” date.
11. A Comment may optionally be added. If multiple DRRs are selected this comment will appear on all audit requests:

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | **Demand Response Resources** | Assets | Audit Requests

Create Demand Response Resource (DRR) Audit Request

Audit Type* Claim 10/Claim 30 |
 Post Dispatch Audit* No |
 Audit Window Start* 03/15/2018 |
 Dispatch Event Start* Hour : : min

Name (ID)	Current Summer Audit Value (MW)	Earliest Summer Audit Expiration	Current Winter Audit Value (MW)	Earliest Winter Audit Expiration
ZCTMAQAD (\$1120)				

Comment
Claim 10 30 audit request

Create Audit Request ← Back to Search

12. Click “Create Audit Request” button.
13. “Demand Response Resource Search” screen displays with message “Successfully added 1 Demand Response Resource Audit Requests”.

Demand Response Resource Search

Successfully added 1 Demand Response Resource Audit Requests

As Of Date* 03/15/2018 |
 Demand Response Resource Name (ID) autocomplete |
 Demand Response Resource Status OPERATIONAL |
 Load Zone Name |
 Market Participant Name (ID) autocomplete

Dispatch Zone Name |
 Aggregation Zone Name |
 Reserve Zone Name |
 Designated Entity Name (ID) autocomplete

Search

14. Select “Dashboard” tab to display pending audit request.

3.2.6 Submit an Audit Request – Both, Seasonal and Claim 10/30

- Role this applies to:
 - Lead Participant Maintainer
1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section.
 2. The “Dashboard” screen displays.
 3. Click on the “Demand Response Resources” tab.
 4. Either enter specific resource information as your search criteria or use the default criteria, and then click the “Search” button.
 5. Check DRR(s) to audit.

Demand Response Resource Search

As Of Date* 03/15/2018
 Demand Response Resource Name (ID) autocomplete
 Demand Response Resource Status OPERATIONAL
 Load Zone Name
 Market Participant Name (ID) autocomplete

Dispatch Zone Name
 Aggregation Zone Name
 Reserve Zone Name
 Designated Entity Name (ID) autocomplete

Request Audit(s)

DRR ID	DRR Name	Last Winter Audit	Last Summer Audit	Market Participant Name (ID)	Load Zone Name (ID)	Aggregation Zone Name (ID)
<input type="checkbox"/>	61136	ZCTMAGAD			Testing Customer (128728)	West/Central Mass (WCMA) (4007)
<input type="checkbox"/>	60845	ZECT02E	01/20/2018	04/20/2018	Testing Customer (128728)	CT (4004)
<input type="checkbox"/>	60802	ZLSMA003	02/27/2018	04/20/2018	Testing Customer (128728)	SEMA (4006)
<input type="checkbox"/>	60900	ZMED03D	01/20/2018	04/20/2018	Testing Customer (128728)	ME (4001)
<input type="checkbox"/>	60873	ZMED4A	01/20/2018	04/20/2018	Testing Customer (128728)	ME (4001)
<input type="checkbox"/>	60847	ZNEWH030	01/20/2018	04/20/2018	Testing Customer (128728)	NH (4002)
<input type="checkbox"/>	60877	ZNSHRO4E	01/20/2018	04/20/2018	Testing Customer (128728)	NEMA (4008)
<input type="checkbox"/>	60879	ZNWVT050	02/02/2018	04/20/2018	Testing Customer (128728)	VT (4003)
<input type="checkbox"/>	61160	ZRI088			Testing Customer (128728)	RI (4005)
<input type="checkbox"/>	60818	ZSEMA013	01/20/2018	04/20/2018	Testing Customer (128728)	SEMA (4006)
<input type="checkbox"/>	60960	ZSEMA05D			Testing Customer (128728)	SEMA (4006)
<input checked="" type="checkbox"/>	61059	ZSEMA088	03/14/2018		Testing Customer (128728)	SEMA (4006)
<input type="checkbox"/>	61163	ZSEMA089			Testing Customer (128728)	SEMA (4006)
<input type="checkbox"/>	61178	ZSEMA08E			Testing Customer (128728)	SEMA (4006)
<input type="checkbox"/>	61227	ZSEMA0CA			Testing Customer (128728)	SEMA (4006)
<input type="checkbox"/>	61239	ZSEMA0CE			Testing Customer (128728)	SEMA (4006)
<input type="checkbox"/>	61243	ZSEMA000			Testing Customer (128728)	SEMA (4006)
<input type="checkbox"/>	61133	ZSFLD0AB			Testing Customer (128728)	West/Central Mass (WCMA) (4007)
<input type="checkbox"/>	60856	ZVT039	01/20/2018	04/20/2018	Testing Customer (128728)	VT (4003)
<input type="checkbox"/>	60840	ZWMA029	03/01/2018	04/20/2018	Testing Customer (128728)	West/Central Mass (WCMA) (4007)

Displaying 1 to 20 of 22

6. Click “Request Audit(s)” button. “Create Demand Response Resource (DRR) Audit Request” screen displays:

Create Demand Response Resource (DRR) Audit Request

Audit Type*
 Post Dispatch Audit* No
 Audit Window Start* 03/16/2018
 Dispatch Event Start* Hour : min

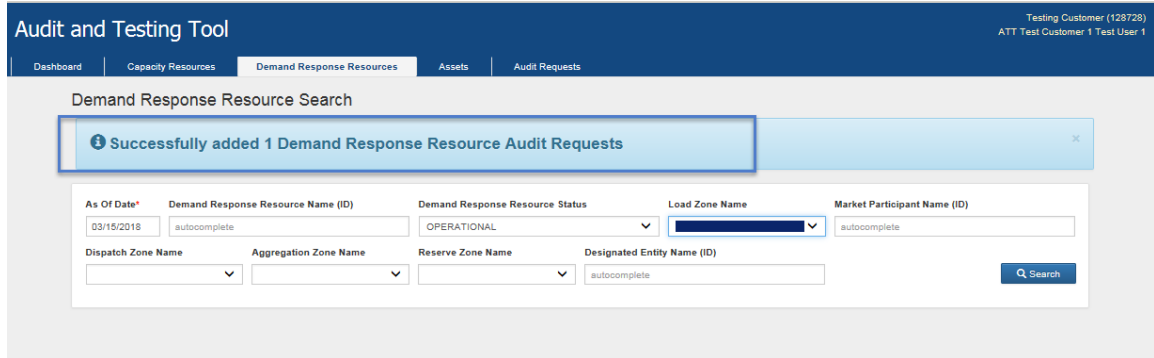
Resources

Name (ID)	Current Summer Audit Value (MW)	Earliest Summer Audit Expiration	Current Winter Audit Value (MW)	Earliest Winter Audit Expiration
ZSEMA088 (61059)	3.290	03/07/2018	3.000	03/08/2018

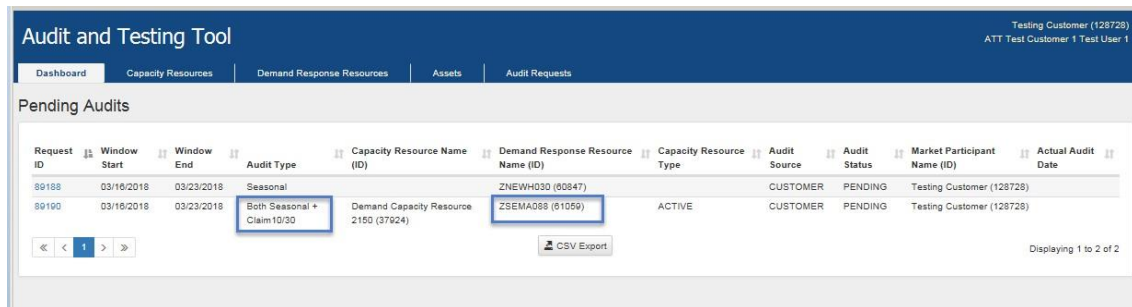
Comment optional

Create Audit Request

7. Select “Audit Type”: Both Seasonal + Claim 10/30.
8. “Post Dispatch Audit” is No.
9. Enter “Audit Window Start” date.
10. Enter “Dispatch Event Start” hour and minute.
11. A Comment may optionally be added. If multiple DRRs are selected this comment will appear on all audit requests.
12. Click “Create Audit Request” button.
13. “Demand Response Resource Search” screens displays with message “Successfully added 1 Demand Response Resource Audit Requests.”



14. Select “Dashboard” tab to display pending audit request.



IMPORTANT

- ❖ The “Audit Results” tab displays results, resource mapping, and audit request information.
- ❖ The “Status History” tab displays the current and prior statuses.
- ❖ The “Dispatch Info” tab displays the dispatch information for DRRs once an audit is initiated.

3.2.7 Cancel DRR audit request

The cancel audit request process allows the Lead Market Participant to cancel an audit request previously submitted through A&TT. Prior to initiation of a customer-requested audit, the Lead Market Participant may request cancellation in A&TT as shown in the following steps. If the audit has already been dispatched it may not be cancelled.

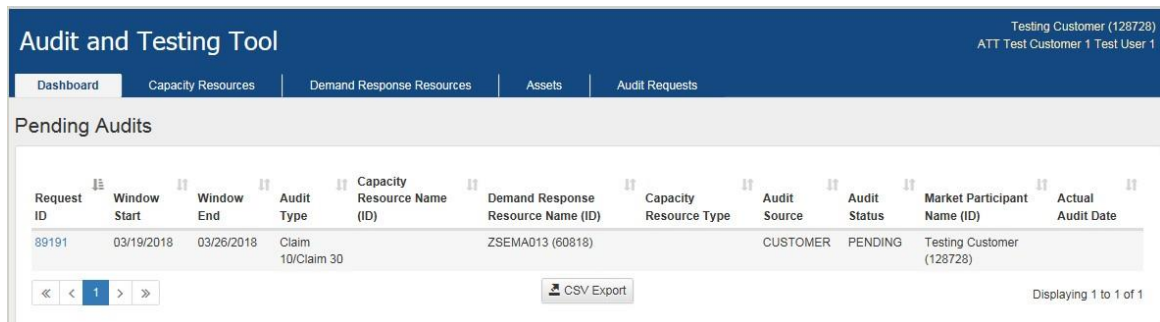
Steps to cancel an audit:

- A. DDE calls ISO dispatch to cancel audit.
- B. Lead Participant cancels audit in A&TT.

IMPORTANT

- ❖ The audit request can be cancelled in A&TT only if:
 - A dispatch instruction has not been issued and
 - The audit request's status is "Pending" or "Scheduled."

- Role this applies to:
 - Lead Participant Maintainer
1. Launch the A&TT interface. See the "[Accessing A&TT](#)" section on page 8.
 2. The "Dashboard" screen displays:



The screenshot shows the 'Audit and Testing Tool' interface. At the top right, it says 'Testing Customer (128728)' and 'ATT Test Customer 1 Test User 1'. Below the title bar are navigation tabs: 'Dashboard', 'Capacity Resources', 'Demand Response Resources', 'Assets', and 'Audit Requests'. The 'Dashboard' tab is selected. The main content area is titled 'Pending Audits' and contains a table with the following data:

Request ID	Window Start	Window End	Audit Type	Capacity Resource Name (ID)	Demand Response Resource Name (ID)	Capacity Resource Type	Audit Source	Audit Status	Market Participant Name (ID)	Actual Audit Date
89191	03/19/2018	03/26/2018	Claim 10/Claim 30		ZSEMA013 (60818)		CUSTOMER	PENDING	Testing Customer (128728)	

Below the table is a pagination control showing '1' and a 'CSV Export' button. The text 'Displaying 1 to 1 of 1' is visible at the bottom right of the table area.

3. Select "Audit Requests" tab.
4. Enter specific resource information as your search criteria and then click the "Search" button.
5. Click the Request ID hyperlink for the audit request that needs to be cancelled.
6. The "Audit Request Details" screen displays.
7. Click the "Cancel this Audit" button.

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | Demand Response Resources | Assets | **Audit Requests**

Audit Request Details

Request ID	Requestor Name (ID)	Audit Type	Comment
89191	ATT Test Customer 1, Test User 1 (9999999691)	Claim 10/Claim 30	
Audit Status	Audit Source	Desired Dispatch MW	Post Dispatch Audit
PENDING	CUSTOME	5,000	No

Resource

Capacity Resource Type	CSO MW	Net CSO MW	Demand Response Resource Name (ID)	Audit Results	Load Zone Name (ID)
			ZSEMA013 (60818)		SEMA (4006)
Capacity Resource Name (ID)	Designated Entity Name (ID)	Aggregation Zone Name (ID)			
	Testing Customer (128728)	DR.MA_SEMA (7613)			

Dates

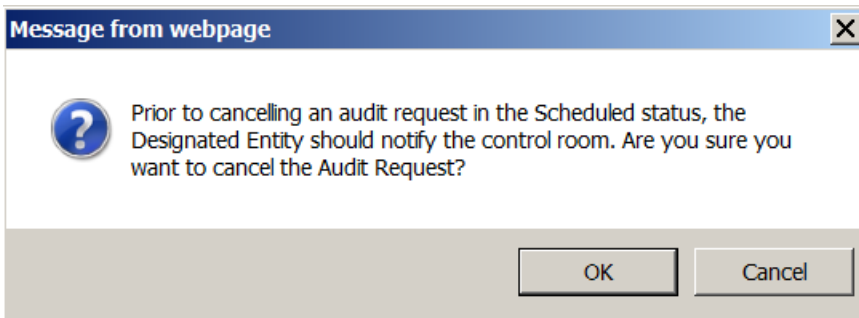
Submitted	Audit Window Start	Audit Window End	Actual Audit Start	Actual Audit End	Earliest Audit Expiration
03/16/2018 12:29	03/19/2018	03/26/2018			

[Cancel this Audit](#)

Audit Results | Status History | Dispatch Info

No audit results found.

8. A popup message displays:



9. The DDE should contact the control room, if this has not already been done.
10. Select "OK" to continue cancellation of the audit request.
11. After selecting "OK" the "Audit Request Details" screen displays with a message indicating the request is cancelled and the audit status displays as "Cancelled."

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User

Dashboard | Capacity Resources | Demand Response Resources | Assets | **Audit Requests**

Audit Request Details

The Audit Request has been cancelled

Request ID	Requestor Name (ID)	Audit Type	Comment
89191	ATT Test Customer 1, Test User 1 (999999691)	Claim 10/Claim 30	

Audit Status	Audit Source	Desired Dispatch MW	Post Dispatch Audit
CANCELLED	CUSTOME	5.000	No

Resource

Capacity Resource Type	CSO MW	Net CSO MW	Demand Response Resource Name (ID)	Audit Results	Load Zone Name (ID)
			ZSEMA013 (60818)		SEMA (4006)

Capacity Resource Name (ID)	Designated Entity Name (ID)	Aggregation Zone Name (ID)
	Testing Customer (128728)	DR_MA_SEMA (7613)

Dates

Submitted	Audit Window Start	Audit Window End	Actual Audit Start	Actual Audit End	Earliest Audit Expiration
03/16/2018 12:29	03/19/2018	03/26/2018			

Audit Results | Status History | Dispatch Info

No audit results found.

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CAUTION

- ❖ Once a resource is dispatched for an audit, the audit request cannot be cancelled.

3.2.8 Display and Search DRR audit requests

The Audit Requests screen allows the Lead Market Participant to view all pending, scheduled, or dispatched audits.

Users may view all information related to a single audit request in A&TT. Once an audit is initiated, they can view information regarding the resource's dispatch in A&TT.

- Roles this applies to:
 - Lead Participant Maintainer
 - Lead Participant Read Only
 - Demand Designated Entity Read Only
1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section on page 8.
 2. The “Dashboard” displays.
 3. Click on the “Audit Requests” tab.
 4. The “Audit Request Search” screen displays:

Request ID	Window Start	Window End	Audit Type	Capacity Resource Name (ID)	Demand Response Resource Name (ID)	Capacity Resource Type	Audit Source	Audit Status	Market Participant Name (ID)	Actual Audit Date
89171	03/06/2018	03/12/2018	Seasonal	ZME04A (60873)			CUSTOMER	WAITING_FOR_DISPATCH_DATA	Testing Customer (128728)	03/06/2018 11:15
89170	03/09/2018	03/16/2018	Both Seasonal + Demand Capacity	ZSEMA088 (61059)		ACTIVE	CUSTOMER	PENDING	Testino Customer	

IMPORTANT

- ❖ The Lead Participant Name (ID) search field is only available to DDE users.

- Based on the Request ID selected on the “Audit Request Search” screen, the “Audit Request Details” screen displays:

Audit Request Details

Request ID	Requestor Name (ID)	Audit Type	Comment
09171	ATT Test Customer 1, Test User 1 (999999601)	Seasonal	

Audit Status	Audit Source	Post Dispatch Audit
WAITING_FOR_DISPATCH_DA'	CUSTOMER	Yes

Resource

Capacity Resource Type	CSO MW	Net CSO MW	Demand Response Resource Name (ID)	Audit Results	Load Zone Name (ID)
			ZME04A (60873)		ME (4001)

Capacity Resource Name (ID)	Market Participant Name (ID)	Designated Entity Name (ID)
	Testing Customer (128728)	Testing Customer (128728)

Aggregation Zone Name (ID)

Dates

Submitted	Audit Window Start	Audit Window End	Actual Audit Start	Actual Audit End	Earliest Audit Expiration
03/08/2018 15:10	03/05/2018	03/12/2018	03/05/2018 11:15	03/05/2018 12:15	

Audit Results Status History Dispatch Info

No audit results found.

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IMPORTANT

- ❖ The “Audit Results” tab displays results, resource mappings, and audit request information.
- ❖ The “Status History” tab displays the current and prior statuses.
- ❖ The “Dispatch Info” tab displays the dispatch information for DRRs once an audit is initiated.

4 Capacity Resources:

4.1 On-Peak and Seasonal Peak Demand Resource audit request overview

Audit requests can only be made by a Lead Market Participant, or in certain cases noted in the Tariff, by ISO New England, to fulfill seasonal Passive DR auditing requirements.

- Lead Market Participants may request an audit to establish or restore the audited demand reduction value of an existing On-Peak or Seasonal Peak Demand Resource at any time.
- Only audits conducted during the seasonal demonstration period will satisfy the seasonal auditing requirement.
- If the Lead Market Participant requests an audit for a future month, the 20 business day clock starts on the effective date of the audit request.
- The audit season will be determined by the actual audit date.
- The audit request submitter must be the Lead Market Participant of that resource as of the audit “Submit Date” and “Audit Window Start Time” of the request.
- Lead Market Participants can submit an audit request of a single demand resource or multiple demand resources. If multiple demand resources are selected, then each will have its own audit request.
- Audit requests that are pending cannot overlap with a new request (though a new request can be placed once a resource has audited).
- Depending on the requested effective date, audits requested for the current month may be postponed to the subsequent month if less than 20 business days remain in the month. To guarantee that an audit is conducted in a particular month, the Lead Market Participant should plan to make the request accordingly so that the 20 business days fall within that month.

4.2 Manage On-Peak and Seasonal Peak Demand Resource audit requests

4.2.1 States of capacity resource audit requests

A request progresses through several states as it goes through the auditing process. The “Dashboard” in A&TT allows a Lead Market Participant to see audit request status:

- **Cancelled:** the audit window has passed and the audit has not been scheduled or The customer or the ISO cancelled the audit request.
- **Pending:** a request has been received by the ISO and it has not been rejected.
- **Scheduled:** an audit month has been assigned by the ISO.
- **Initial Review In-Progress:** begins after the initial data submittal deadline.
- **Initial Review Complete:** reflects when all assets are in an Approved or Deferred status following initial review.
- **Final Review In-Progress:** begins after the final data submittal deadline (70 calendar days following the first day of the month following the settlement month).

- Complete: at this stage all data reconciliation data has been received, and the ISO has finalized its determination of the contribution of each asset made during an audit to its associated On-Peak or Seasonal Peak Demand Resource. The asset result states at this stage are Approved or Failed.

4.2.2 Display and Search On-Peak and Seasonal Peak Demand Resources

- Roles this applies to:
 - Lead Participant Maintainer
 - Lead Participant Read Only
1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section on page 8.
 2. The “Dashboard” displays.
 3. Click on “Capacity Resources” tab.
 4. The “Capacity Resources Search” screen displays:

5. Select “Capacity Resource Type” of **On-Peak** or **Seasonal Peak**.
6. Select “Search” button.
7. Results display:

Request Audit(s)

Capacity Resource ID	Capacity Resource Name	Market Participant Name (ID)	Capacity Resource Type	Load Zone Name (ID)	Aggregation Zone Name (ID)
12806	Demand Capacity Resource 1348	Testing Customer (128728)	SEASONAL_PEAK	West/Central Mass (WCMA) (4007)	
16547	Demand Capacity Resource 1696	Testing Customer (128728)	SEASONAL_PEAK	CT (4004)	
9103	Demand Capacity Resource 46	Testing Customer (128728)	SEASONAL_PEAK	CT (4004)	
12835	Demand Capacity Resource 1377	Testing Customer (128728)	ON_PEAK	SEMA (4006)	
38202	Demand Capacity Resource 2291	Testing Customer (128728)	ON_PEAK	SEMA (4006)	
38216	Demand Capacity Resource 2302	Testing Customer (128728)	ON_PEAK	West/Central Mass (WCMA) (4007)	
9108	Demand Capacity Resource 51	Testing Customer (128728)	ON_PEAK	VT (4003)	
37924	Demand Capacity Resource 2150	Testing Customer (128728)	ACTIVE	SEMA (4006)	DR.MA_SEMA (7613)
37930	Demand Capacity Resource 2156	Testing Customer (128728)	ACTIVE	CT (4004)	DR.CT_Eastern (7600)
37942	Demand Capacity Resource 2168	Testing Customer (128728)	ACTIVE	VT (4003)	DR.VT_Vermont (7615)
37944	Demand Capacity Resource 2170	Testing Customer (128728)	ACTIVE	West/Central Mass (WCMA) (4007)	DR.MA_Western (7618)
37993	Demand Capacity Resource 2190	Testing Customer (128728)	ACTIVE	CT (4004)	DR.CT_Eastern (7600)

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8. Click "Capacity Resource ID" hyperlink.
9. The "Capacity Resource Details" screen displays:

Audit and Testing Tool

Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | Demand Response Resources | Assets | Audit Requests

Capacity Resource Details

Resource Information

As Of: 03/15/2018

Capacity Resource Name (ID): Demand Capacity Resource 51 (9108)

Capacity Resource Type: ON_PEAK

Net CSO MW: 0.011

Load Zone Name (ID): VT (4003)

Aggregation Zone Name (ID):

Dispatch Zone Name (ID):

Reserve Zone Name (ID): ROS (7000)

Companies

Market Participant Name (ID): Testing Customer (128728)

Designated Entity Name (ID):

Capability History

Effective	Season	Value	Audit Request ID	Audit Date	Expires	Status
08/01/2017	SUMMER	0.069	6937	08/25/2017		COMPLETE
01/01/2017	WINTER	0.148	6562	01/19/2017		COMPLETE

CSV Export

Displaying 1 to 2 of 2

10. "Capability History" tab displays existing historical audit data for the resource. Click on "Audit Request ID" to see audit details.

Capacity Resource Details

Resource Information

As Of: 03/15/2018

Capacity Resource Name (ID): Demand Capacity Resource 51 (9108)

Capacity Resource Type: ON_PEAK

Net CSO MW: 0.011

Load Zone Name (ID): VT (4003)

Aggregation Zone Name (ID):

Dispatch Zone Name (ID):

Reserve Zone Name (ID): ROS (7000)

Companies

Market Participant Name (ID): Testing Customer (128729)

Designated Entity Name (ID):

Capability History

Mapped Demand Assets

ID	Name	MIC
33355	Res OPEE	0.381

Displaying 1 to 1 of 1

- The “Mapped Demand Assets” tab displays the asset id, asset name, and MIC of all assets mapped to this resource based on the ‘as of’ date. Click on “ID” to see the asset details.

IMPORTANT

- ❖ Only the entity indicated as the Lead Market Participant of the resource as of the time of the audit can view the “Capability History” and “Mapped Demand Assets” tabs.

4.2.3 Submit On-Peak or Seasonal Peak Demand Resource audit requests

- This applies to the Lead Participant Maintainer role.
 1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section on page 8.
 2. The “Dashboard” displays.
 3. Click on “Capacity Resources” tab.
 4. The “Capacity Resources Search” screen displays:

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard Capacity Resources Demand Response Resources Assets Audit Requests

Capacity Resource Search

As Of Date* 03/15/2018 Capacity Resource Type [dropdown] Load Zone Name (ID) [dropdown] Dispatch Zone Name (ID) [dropdown] Aggregation Zone Name (ID) [dropdown] Reserve Zone Name (ID) [dropdown]

Capacity Resource Name (ID) autocomplete Capacity Resource Status ACTIVE Designated Entity Name (ID) autocomplete Market Participant Name (ID) autocomplete

Search

5. Select “Capacity Resource Type” of On-Peak or Seasonal Peak.
6. Select “Search” button.

Capacity Resource Search

As Of Date* 03/27/2018 Capacity Resource Type Seasonal Peak (SEAS) Load Zone Name (ID) [dropdown] Dispatch Zone Name (ID) [dropdown] Aggregation Zone Name (ID) [dropdown] Reserve Zone Name (ID) [dropdown]

Capacity Resource Name (ID) autocomplete Capacity Resource Status ACTIVE Designated Entity Name (ID) autocomplete

Search

Request Audit(s)

Capacity Resource ID	Capacity Resource Name	Market Participant Name (ID)	Capacity Resource Type	Load Zone Name (ID)	Aggregation Zone Name (ID)
<input checked="" type="checkbox"/>	12806 Demand Capacity Resource 1348	Testing Customer (128728)	SEASONAL_PEAK	West/Central Mass (WCMA) (4007)	
<input checked="" type="checkbox"/>	16547 Demand Capacity Resource 1696	Testing Customer (128728)	SEASONAL_PEAK	CT (4004)	
<input type="checkbox"/>	9103 Demand Capacity Resource 46	Testing Customer (128728)	SEASONAL_PEAK	CT (4004)	

« < 1 > » CSV Export Displaying 1 to 3 of 3

7. Check “Capacity Resource ID(s)” to audit.
8. Click “Request Audit(s)” button.
9. The “Create Capacity Resource Audit Request” screen displays:

Create Capacity Resource Audit Request

Audit Window Start* **Actual Audit Month***

Resources

Name (ID)	Current Summer Audit Value (MW)	Current Winter Audit Value (MW)	Future Max Net CSO	Current Season Max Net CSO	Next Season Max Net CSO
Demand Capacity Resource 1696 (16547)			4.000	4.000	4.000
Demand Capacity Resource 1348 (12806)			37.885	45.385	37.885

Comment

optional

10. Select the Actual Audit Month: this is the last day of the audit month that will be evaluated by the ISO (multiple months may be available if the Audit Window spans multiple months)
11. A Comment may optionally be added and will appear on all audit requests if multiple resources are selected.
12. Click "Create Audit Request" button.
13. Receive message "Successfully added 2 Capacity Resource Audit Requests".
14. Select "Dashboard" to display submitted audit request(s).
15. Click "Request ID" to display "Audit Request Details" screen.

Audit Request Details

Request ID	Requestor Name (ID)	Audit Type	Comment
89239	ATT Test Customer 1, Test User 1 (999999691)	Seasonal	

Audit Status	Audit Source	Post Dispatch Audit	Season
SCHEDULED	CUSTOMER	No	Summer

Resource

Resource Type	CSO MW	Net CSO MW	Demand Response Resource Name (ID)	Audit Results	Load Zone Name (ID)
SEASONAL_PEAK	3.639	3.369			CT (4004)

Capacity Resource Name (ID)	Designated Entity Name (ID)	Aggregation Zone Name (ID)
Demand Capacity Resource 1696 (16547)		

Dates

Submitted	Audit Window Start	Audit Window End	Actual Audit Start	Actual Audit End	Actual Audit Month
03/27/2018 14:22	04/03/2018	05/15/2018	03/31/2018 00:00	03/31/2018 00:00	03/31/2018

4.2.4 Display and Search On-Peak and Seasonal Peak Demand Resource audit requests

The Audit Request tab allows the Lead Market Participant to view all audit requests. Users may view all information related to a single audit request in A&TT.

- Roles this applies to:
 - Lead Participant Maintainer
 - Lead Participant Read Only
 - Demand Designated Entity Read Only
1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section on page 8.
 2. The “Dashboard” displays.
 3. Click on “Audit Requests” tab.
 4. The “Audit Request Search” screen displays:

The screenshot shows the 'Audit and Testing Tool' interface with the 'Audit Requests' tab selected. The 'Audit Request Search' screen is displayed, featuring three main sections for filtering: 'Resource Characteristics', 'Audit Request Characteristics', and 'Dates'. Below these sections is a search results table.

Request ID	Window Start	Window End	Audit Type	Capacity Resource Name (ID)	Demand Response Resource Name (ID)	Capacity Resource Type	Audit Source	Audit Status	Market Participant Name (ID)	Actual Audit Date
89171	03/05/2018	03/12/2018	Seasonal	ZME04A (60873)		On Peak	CUSTOMER	WAITING_FOR_DISPATCH_DATA	Testing Customer (128728)	03/05/2018 11:15
89170	03/09/2018	03/16/2018	Both Seasonal + Demand Capacity	ZSEMA088 (610591)		Active	CUSTOMER	PENDING	Testino Customer	

5. Search criteria related to Seasonal Demand Resources:
 - Capacity Resource Name (ID)
 - Request ID/Requester Name
 - Audit Type = Seasonal
 - Capacity Resource Type = On Peak or Seasonal Peak
 - Audit Status: all criteria except ‘Dispatch Ended’, ‘Dispatch Received’, or ‘Waiting for Dispatch Data’
 - Load Zone

4.2.5 Cancel On-Peak or Seasonal Peak Demand Resource audit request

1. Search for the audit request you wish to cancel by searching on the audit request ID or On-Peak or Seasonal Peak Demand Resource ID on the Audit Request Search Screen.
2. Click on the audit request ID to open. From the “Audit Request Details” screen, click “Cancel this Audit” button.

Resource

Capacity Resource Type	CSO MW	Net CSO MW	Demand Response Resource Name (ID)	Audit Results	Load Zone Name (ID)
SEASONAL_PEAK	3.639	3.369			CT (4004)

Capacity Resource Name (ID): Demand Capacity Resource 46 (9103)
Designated Entity Name (ID):
Aggregation Zone Name (ID):

Dates

Submitted	Audit Window Start	Audit Window End	Actual Audit Start	Actual Audit End	Earliest Audit Expiration
03/27/2018 10:12	04/03/2018	05/15/2018			

Actual Audit Month:

[Edit](#) [Cancel this Audit](#)

[Audit Results](#) [Status History](#)

No audit results found.

3. Receive message “The Audit Request has been cancelled.”

IMPORTANT

- ❖ The audit request can be cancelled in A&TT only if:
 - The audit request’s status is “Pending” or “Scheduled”, and
 - The seasonal audit requirement has been satisfied if attempting to cancel an audit request in August or January.

4.3 Active Demand Capacity Resources (ADCR)

4.3.1 Display and Search Active Demand Capacity Resources

- Roles this applies to:
 - Lead Participant Maintainer
 - Lead Participant Read Only
1. Launch the A&TT interface. See the “[Accessing A&TT](#)” section on page 8.
 2. The “Dashboard” displays.
 3. Click on “Capacity Resources” tab.
 4. The “Capacity Resources Search” screen displays.
 5. Select “Capacity Resource Type” of **Active**.
 6. Click “Search” button.
 7. Search results display:

The screenshot shows the 'Audit and Testing Tool' interface. The top navigation bar includes 'Dashboard', 'Capacity Resources', 'Demand Response Resources', 'Assets', and 'Audit Requests'. The 'Capacity Resources' tab is selected. The 'Capacity Resource Search' form is displayed with the following fields:

- As Of Date: 03/15/2018
- Capacity Resource Type: Active (ACTIVE)
- Load Zone Name (ID): [Empty]
- Dispatch Zone Name (ID): [Empty]
- Aggregation Zone Name (ID): [Empty]
- Reserve Zone Name (ID): [Empty]
- Capacity Resource Name (ID): autocomplete
- Capacity Resource Status: ACTIVE
- Designated Entity Name (ID): autocomplete
- Market Participant Name (ID): autocomplete

A 'Search' button is located to the right of the form. Below the search form is a table of search results. The table has the following columns: Capacity Resource ID, Capacity Resource Name, Market Participant Name (ID), Capacity Resource Type, Load Zone Name (ID), and Aggregation Zone Name (ID). The first row is highlighted with a blue border.

Capacity Resource ID	Capacity Resource Name	Market Participant Name (ID)	Capacity Resource Type	Load Zone Name (ID)	Aggregation Zone Name (ID)
37924	Demand Capacity Resource 2150	Testing Customer (128728)	ACTIVE	SEMA (4006)	DR.MA_SEMA (7613)
37930	Demand Capacity Resource 2156	Testing Customer (128728)	ACTIVE	CT (4004)	DR_CT_Eastern (7600)
37942	Demand Capacity Resource 2168	Testing Customer (128728)	ACTIVE	VT (4003)	DR_VT_Vermont (7615)
37944	Demand Capacity Resource 2170	Testing Customer (128728)	ACTIVE	West/Central Mass (WCMA) (4007)	DR.MA_Western (7618)
37993	Demand Capacity Resource 2190	Testing Customer (128728)	ACTIVE	CT (4004)	DR_CT_Eastern (7600)
38126	Demand Capacity Resource 2263	Testing Customer (128728)	ACTIVE	ME (4001)	DR.ME_Maine (7606)
38126	Demand Capacity Resource 2294	Testing Customer (128728)	ACTIVE	NH (4002)	DR.NH_New_Hampshire (7610)
38127	Demand Capacity Resource 2285	Testing Customer (128728)	ACTIVE	NEMA (4008)	DR.MA_North_Shore (7609)
38138	Demand Capacity Resource 2276	Testing Customer (128728)	ACTIVE	West/Central Mass (WCMA) (4007)	DR.MA_Western (7618)
38324	Demand Capacity Resource 2343	Testing Customer (128728)	ACTIVE	SEMA (4006)	DR.MA_Lower_SEMA (7612)
38994	Demand Capacity Resource 2437	Testing Customer (128728)	ACTIVE	ME (4001)	DR.ME_Maine (7606)
38803	Demand Capacity Resource 2472	Testing Customer (128728)	ACTIVE	West/Central Mass (WCMA) (4007)	DR.MA_Springfield (7617)
38876	Demand Capacity Resource 2490	Testing Customer (128728)	ACTIVE	West/Central Mass (WCMA) (4007)	DR.MA_Western (7618)

At the bottom of the table, there is a 'Request Audit(s)' button, a 'CSV Export' button, and a pagination indicator showing 'Displaying 1 to 13 of 13'.

8. Click “Capacity Resource ID” hyperlink.
9. The “Capacity Resource Details” screen displays:

Capacity Resource Details

Resource Information

As Of: 03/15/2018
 Capacity Resource Name (ID): Demand Capacity Resource 2263 (38125)
 Capacity Resource Type: ACTIVE
 Net CSO MW: 32,354

Load Zone Name (ID): ME (4001)
 Aggregation Zone Name (ID): DR.ME_Maine (7006)
 Dispatch Zone Name (ID): Maine (7505)
 Reserve Zone Name (ID): ROS (7000)

Companies

Market Participant Name (ID): Testing Customer (128728)
 Designated Entity Name (ID):

Capability History | Mapped Demand Response Resources

Effective	Season	Value	Audit Request ID	Audit Date	Expires	Status
01/01/2018	SUMMER	38,318				
01/01/2018	WINTER	27,647				

CSV Export | Displaying 1 to 2 of 2

10. “Capability History” tab displays existing historical audit data for the resource. Click on “Audit Request ID” to see audit details.

Capacity Resource Details

Resource Information

As Of: 03/15/2018
 Capacity Resource Name (ID): Demand Capacity Resource 2263 (38125)
 Capacity Resource Type: ACTIVE
 Net CSO MW: 32,354

Load Zone Name (ID): ME (4001)
 Aggregation Zone Name (ID): DR.ME_Maine (7006)
 Dispatch Zone Name (ID): Maine (7505)
 Reserve Zone Name (ID): ROS (7000)

Companies

Market Participant Name (ID): Testing Customer (128728)
 Designated Entity Name (ID):

Capability History | Mapped Demand Response Resources

ID	Name
60826	DRR 60826
60870	DRR 60870
60871	DRR 60871
60872	DRR 60872

Link to DRR record

11. The “Mapped Demand Response Resources” tab displays the resource name. Click on “ID” to see the DRR details.

IMPORTANT

- ❖ Only the entity indicated as the Lead Market Participant as of the time of the audit can view the “Capability History” and “Mapped Demand Assets” tabs.

5 Assets:

5.1 Asset Overview

Each asset is associated with either a DRR or an On-Peak or Seasonal Peak Demand Resource. The Asset tab allows the ability to search assets by different Capacity Resource types and displays each asset's audit history.

5.1.1 Display assets

- Roles this applies to:
 - Lead Participant Maintainer
 - Lead Participant Read Only
 - Demand Designated Entity Read Only

IMPORTANT

- ❖ The "As of Date" field defaults to the current date

5.1.2 Search assets

1. Enter search criteria.
2. Capacity Resource Types to search: On-Peak, Seasonal Peak, or Active.
3. Click "Search" button.
4. The "Asset Search" screen displays with results:

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | Demand Response Resources | **Assets** | Audit Requests

Asset Search

As Of Date* Asset Name(ID) Capacity Resource Type Capacity Resource Name (ID) Audit Effective Date From To

Designated Entity Name (ID) Demand Resource Name (ID) Audit Expiration Date From To

[Search](#)

Asset ID	Asset Name	Market Participant Name (ID)	Capacity Resource Name (ID)	Demand Response Resource Name (ID)	Designated Entity Name (ID)
33320	OP Energy Efficiency	Testing Customer (128728)			
33324	OP Energy Efficiency Portfolio	Testing Customer (128728)			
33326	LED Portfolio OP-EE	Testing Customer (128728)	Demand Capacity Resource 1387 (12845)		
33355	Res OPEE	Testing Customer (128728)	Demand Capacity Resource 51 (9108)		
34048	Factory Portfolio SP-EE	Testing Customer (128728)	Demand Capacity Resource 1348 (12806)		
37810	Com & Res SP-EE	Testing Customer (128728)			
46737	Electric Company C&LM	Testing Customer (128728)	Demand Capacity Resource 1696 (16547)		
60053	Plant 1	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60091	DR Store	Testing Customer (128728)		ZCTMADAD (61136)	Testing Customer (128728)
60097	College 1	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60113	Plant 2	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60137	Business 2	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60151	Business 3	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60152	Business 1	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60181	Marx Brothers Community Farms	Testing Customer (128728)	Demand Capacity Resource 2168 (37942)	ZVTD39 (60856)	Testing Customer (128728)
60193	College 2	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60198	Factory 2	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60217	College 4	Testing Customer (128728)	Demand Capacity Resource 2490 (38878)	ZWMA029 (60840)	Testing Customer (128728)
60221	DR Plant	Testing Customer (128728)		ZNWV/T050 (60879)	Testing Customer (128728)
60234	Fidget Spinner Factory	Testing Customer (128728)		ZME04A (60873)	Testing Customer (128728)

[«](#) [<](#) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [>](#) [»](#)

[CSV Export](#)

Displaying 1 to 20 of 133

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5. Click on the hyperlink in the “Asset ID” column to view asset details.
6. Asset Results History displays:

Audit and Testing Tool Testing Customer (128728)
ATT Test Customer 1 Test User 1

Dashboard | Capacity Resources | Demand Response Resources | **Assets** | Audit Requests

Asset Details

As Of Asset Name (ID)

[Resource Details](#)

Capacity Resource Type Capacity Resource Name (ID) Demand Response Resource Name (ID)

[Companies](#)

Designated Entity (ID)

[Audit Result History](#)

Effective	Season	Value MW	Audit Request ID	Audit Date	Expires	Status
01/01/2018	SUMMER	1.810	88910	04/20/2018	08/31/2019	APPROVED
01/01/2018	WINTER	2.679	88911	01/20/2018	03/31/2019	APPROVED

[«](#) [<](#) [1](#) [>](#) [»](#)

[CSV Export](#)

Displaying 1 to 2 of 2

5.1.3 Search asset audit status history

1. Click on Audit Request ID hyperlink.
2. "Asset Request Details" screen displays.
3. Click "Status History" tab.

Audit Request Details

Request ID	Requestor Name (ID)	Audit Type	Comment		
<input type="text"/>	<input type="text" value="SYS_CREATE_MISSING_SEASONAL_AUDIT"/>	<input type="text" value="Seasonal"/>	ISO Initiated Seasonal Audit		
Audit Status	Audit Source	Post Dispatch Audit			
<input type="text" value="COMPLETE"/>	<input type="text" value="CUSTOME"/>	<input type="text" value="No"/>			

Resource

Capacity Resource Type	CSO MW	Net CSO MW	Demand Response Resource Name (ID)	Audit Results	Load Zone Name (ID)
<input type="text" value="ON_PEAK"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="NEMA (4008)"/>

Capacity Resource Name (ID)	Market Participant Name (ID)	Designated Entity Name (ID)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Aggregation Zone Name (ID)

Dates

Submitted	Audit Window Start	Audit Window End	Actual Audit Start	Actual Audit End	Earliest Audit Expiration
<input type="text" value="08/01/2017 00:20"/>	<input type="text" value="08/02/2017"/>	<input type="text" value="08/30/2017"/>	<input type="text" value="08/25/2017 00:00"/>	<input type="text" value="08/25/2017 00:00"/>	<input type="text" value="08/31/2018"/>

Actual Audit Month

[Audit Results](#)
[Status History](#)

Status	Date Effective	Date Expires	Comment
Complete	11/27/2017 11:57:10		
Initial Asset Review Complete	09/06/2017 14:52:45	11/10/2017 00:12:32	
Scheduled	08/10/2017 14:24:25	08/26/2017 00:35:41	
Pending	08/01/2017 00:20:44	08/10/2017 14:24:25	

IMPORTANT

- ❖ Only the entity indicated as the Lead Market Participant of the resource as of the time of the audit can view the "Capability History" and "Mapped Demand Assets" tabs.

5.2 Search Audit Values

The Audit Values tab allows the ability to search all Assets and displays each asset's audit value on a given date.

1. Select "Audit Values" tab, search screen displays.
2. Enter search criteria.
3. Click "Search" button.
4. The "Audit Values Search" screen displays with results:

Audit Values Search

As Of Date*	Asset Name(ID)	Demand Response Resource Name (ID)	Capacity Resource Name (ID)	Resource Type
05/24/2022	autocomplete	autocomplete	autocomplete	
		Aggregation Zone Name	Load Zone Name	Asset Status
				Approved

Search

Asset ID	Asset Name	DRR ID	DRR Name	Capacity Resource ID	Capacity Resource Name	Market Participant Name (ID)	Summer Audit ID	Summer Audit Result	Summer Audit Expiration Date	Winter Audit ID	Winter Audit Result	Winter Audit Expiration Date

IMPORTANT

- ❖ The information is always displayed as of the "As Of Date".
- ❖ The "Asset Status" criteria defaults to "Approved".

6 A&TT Roles

6.1 Lead Participant Maintainer

- Read/write access allows the Lead Market Participant to assign users who can view, submit and edit audit requests and review asset results information.
 - For additional information see the following sections in this user guide:
 - [“Get Started”](#) (page 8)
- A company may have multiple users with the Lead Participant Maintainer role.
- Only a Security Administrator may assign the Lead Participant Maintainer role to a person.

6.2 Lead Participant Read Only

- Read-only access allows users to view the relevant audit requests and asset results data.
 - For additional information see the following sections in this user guide:
 - [“Get Started”](#) (page 8)
- A company may have multiple users with the Lead Participant Read Only role.
- Only a Security Administrator may assign the Lead Participant Read Only role to a person.

6.3 Demand Designated Entity Read Only

- Read-only access allows the DDE of a Demand Resource to view pertinent audit requests and results information in support of their role as the DDE for a resource.
 - For additional information see the following sections in this user guide:
 - [“Get Started”](#) (page 8)
- A company may have multiple users with the Demand Designated Entity Read Only role.
- Only a Security Administrator may assign the Demand Designated Entity Read Only role to a person.

7 Participant Support

7.1 By Internet



<http://www.iso-ne.com/support/index.html>

7.2 By Telephone



During Regular Business Hours, Monday through Friday:
8:00 A.M. to 5:00 P.M. Eastern Time:
(413) 540-4220
(833) 248-4220 (toll-free)

For a current list of holidays observed, please visit:
<https://www.iso-ne.com/about/contact/business-hours>.

For emergency inquiries by pager:
(877) 226-4814

7.3 By Email



AskISO@iso-ne.com

7.4 Ask ISO



Ask ISO is available for you to request assistance and submit inquiries to ISO New England Participant Support. If you are listed in the CAMS you will automatically be registered in Ask ISO. If you are not listed in the CAMS go to <https://askiso.force.com> and click “Not a member?”

For more details about Ask ISO please refer to the [user guide](#).