GridInterConnect for Transmission (GIC-T) User Guide

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Disclaimer

Training Disclaimer

ISO New England (ISO) provides training to enhance participant and stakeholder understanding.

Because not all issues and requirements are addressed by the training, participants and other stakeholders should not rely solely on this training for information but should consult the effective *Transmission, Markets and Services Tariff* ("Tariff") and the relevant *Market Manuals, Operating Procedures* and *Planning Procedures* ("Procedures").

In case of a discrepancy between training provided by ISO and the Tariff or Procedures, the meaning of the Tariff and Procedures shall govern.

- Screenshots may appear slightly different than what you see in the latest version, or they may include references to SANDBOX.
- Email and other contact information has been hidden in screenshots.
- Updates to the user guide will be rolled out incrementally.

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Change Summary

Revision	Date	Comments
Version 1.0	9/26/2026	Initial release
Version 2.0	10/4/2026	Corrected website address. Updated disclaimer. Added Section 5, Appendix B, and Appendix C. Updated formatting.

1. Getting Started

Helpful Terms

Term (Acronym)	Description
Account	A user login that can be granted access (i.e., roles) to one or more interconnection companies (organizations)
Affiliate	An account that has been invited by an administrator of another organization. Affiliates are granted access to projects
GridInterConnect for Transmission (GIC-T)	The software used to complete and submit interconnection requests, sometimes referred to as GridUnity.
GridUnity	The name of the software company that developed GridInterConnect for Transmission (GIC-T), sometimes used to refer to the GIC-T software.
Organization (Org)	The Interconnection Customer (IC) company who will be submitting an interconnection request
Member	An employee of the Interconnection Customer who has access to the Organization in GridUnity (including My Organization)
Role	The access level that can be granted to users (accounts) to complete associated tasks. Roles determine visibility of tasks to accounts
Operator	ISO New England is the operator (sometimes referred to as the operator tenant)
Project	An Interconnection Request (IR) in GridUnity
Task	A series of fields to complete in the application intake process
Tenant	ISO New England is the tenant. When your organization connects to the ISO-NE Tenant, its members and affiliates are connected automatically

Important Links and Resources

These are links that you may find useful.

- GridUnity's GridInterConnect for Transmission website
- ISO New England Open Access Transmission Tariff (OATT) Home Page
- ISO New England Interconnection Request Page
- Schedule 22 (Large Generator Interconnection Procedures)
- Schedule 23 (Small Generator Interconnection Procedures)
- Schedule 25 (Elective Transmission Upgrade Interconnection Procedures)

2. Creating the Organization and Administrator Account

If the company representing your Interconnection Customer (IC) does not currently have a GridUnity account, it is critical to create its organization and first administrator account properly. This section will help guide you through how to create and set up your organization and its first account.

Both interconnection customers and consultant organizations must create an organization; however, consultant organizations must be invited to affiliate with an interconnection customer's organization in GridUnity. For more information about inviting consultants to affiliate with an IC's organization, see *Section 4: Managing Account Access and Roles*.

Workflow: Create & Setup Organization (Owner Account)

1. Create owner account for the organization (IC)
   ⚠ *By default, this account will become the org's owner in the GridUnity software.*
2. Create new organization using IC name from the Customer and Asset Management System (CAMS) if it exists
3. Request Tenant Access for your organization (submitted to ISO New England)
4. Invite members (employees)

   Invite employees via My Organization > Members using their IC email address to give them view or write access to the org
5. Invite affiliates (consultants)

   Invite affiliates via My Organization > Affiliates
   ⚠ *Affiliates must create an organization*

6. Set account roles for the org and for projects (once created)

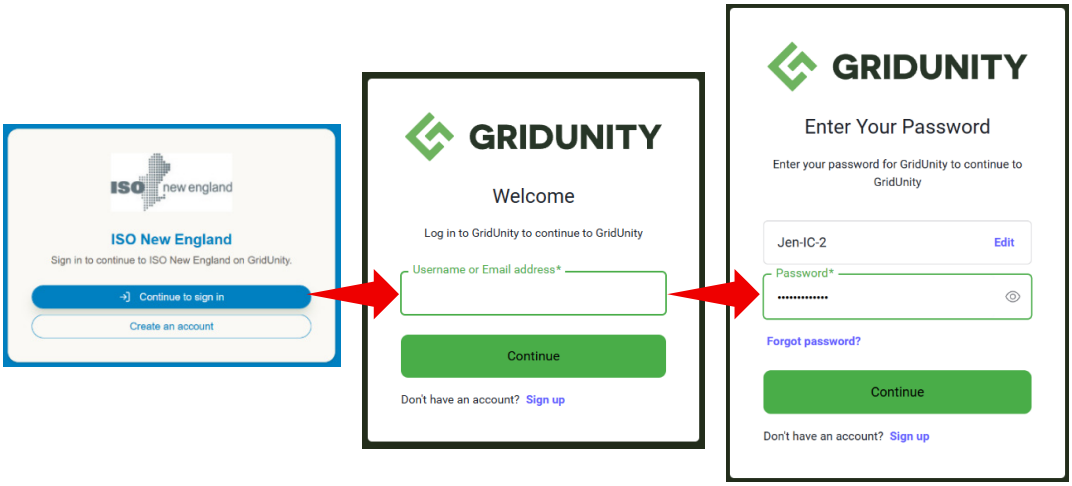
    - **Viewer:** Open the project and view its data, status, timeline, and documents.
    - **Contributor:** Viewer role, edit requests, upload documents, and submit.
    - **Owner:** Contributor role, grant and remove user access and roles.

Once the organization is set up, a New Project may be started. Please note that while the organization and its members and affiliates may be configured before the Cluster Request Window (CRW) opens, you must wait until the CRW to create a new project.

Create the Organization (Interconnection Customer)

In GridUnity, Interconnection Customer (IC) companies are referred to as organizations. When setting up the IC as an organization in GridUnity for the first time, it is important that it is created correctly. Improperly created organizations could delay the submission of an interconnection request.

Use Appendix A: Organization and Account Planning Sheet as a guide to help create your organization and user accounts.

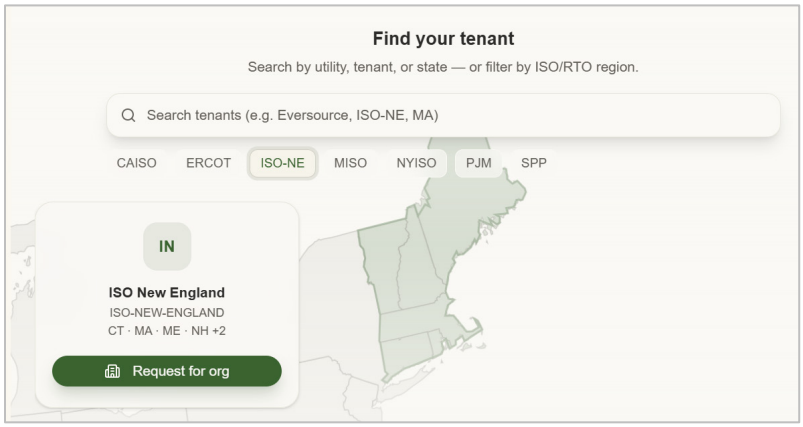


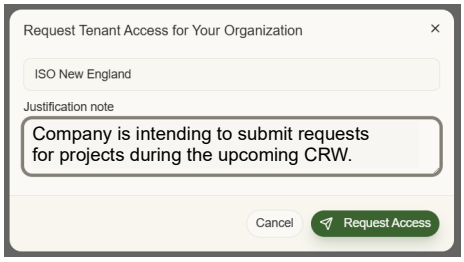
1. Navigate to the GridUnity website: http://gridunity.net/iso-ne
2. At the home screen, choose Create an Account.
3. Enter your email address, username (optional), and click Continue.
4. Enter a password and click Continue.
5. From the email you used to sign up, click the verification link sent by GridUnity.

Request Tenant Access

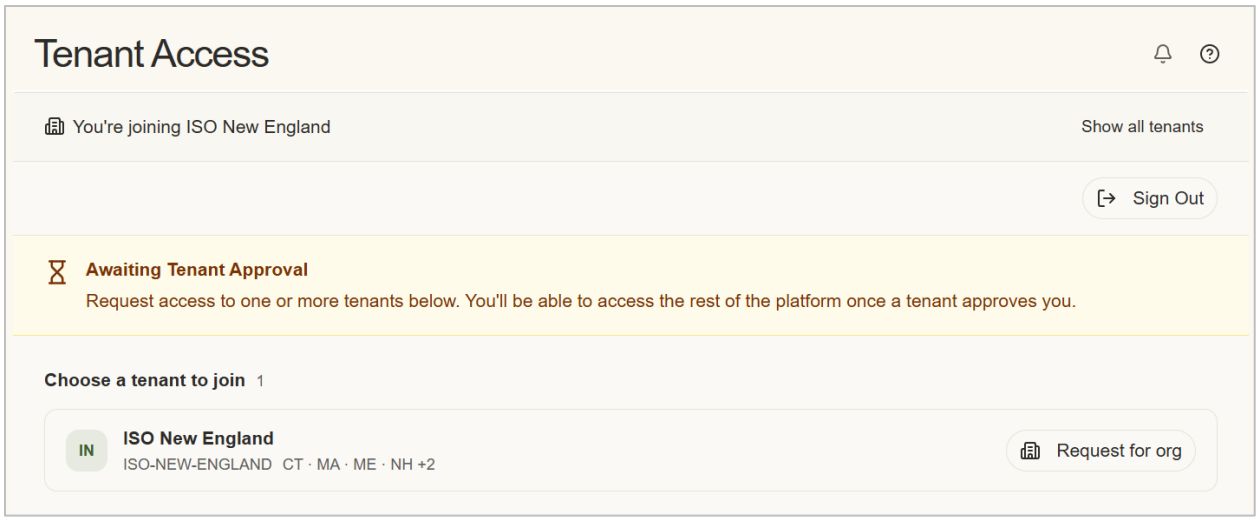
When you log in for the first time, you must request access to the Tenant, ISO New England.

>>> **Note:** If you received an email invitation from an organization to create a member account or an affiliate account, you will not be asked to complete this step.





1. Click the ISO New England **Request for org** button.
2. Add a justification note (for ISO New England to review) and click Request Access.
3. Upon Tenant Approval, you will be able to access the GridUnity platform.

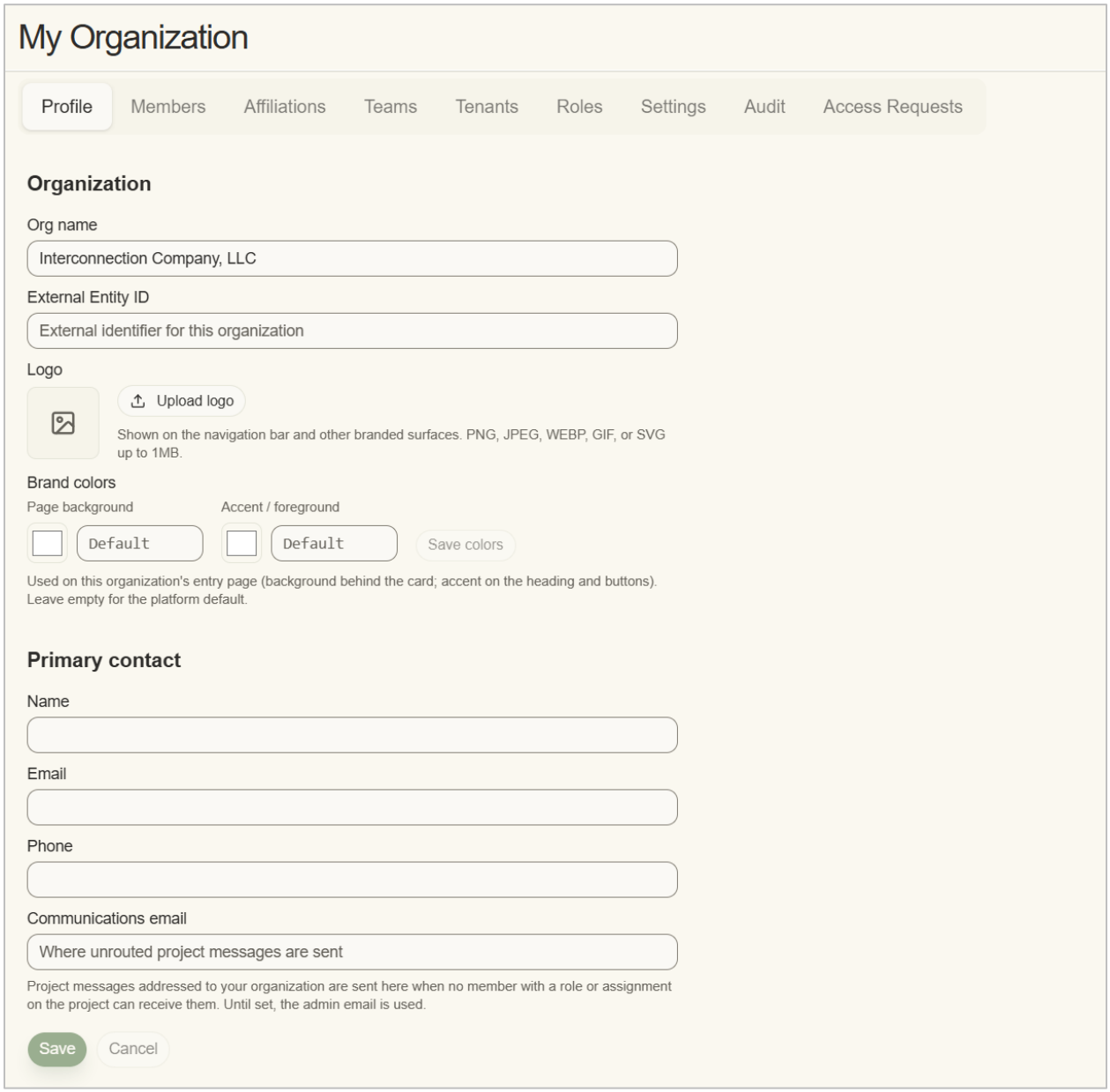


Manage Organization Identity

Once an organization is created, navigate to **User Menu > My Organization > Profile** to configure the company's core identity and contact details. When setting up your profile, the **Org name** must be entered exactly as it appears in the ISO New England Customer and

Asset Management System (CAMS) to ensure data seamlessly matches across all ISO software platforms.

Additionally, if your company has an existing ISO Customer ID, it is critical that you enter it into the **External Entity ID** field. If your company does not have an ISO Customer ID, please complete and submit the Request Generation Interconnect Customer ID. It may take up to ten (10) business days for ISO New England to review and process this request.



You can also use the My Organization page to designate the organization's primary contact and establish a default communications email for unrouted project messages.

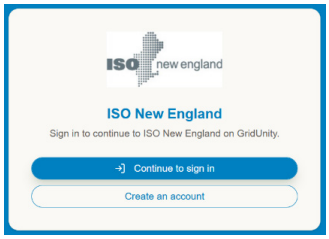
3. Navigating GridUnity

This section introduces the key navigation and workspace components you'll use throughout GridUnity. Understanding how these areas work together will help you access projects, manage tasks, and find the information you need more efficiently.

The web address to sign in to GridUnity is https://gridunity.net/iso-ne.

Access GridUnity

At the home screen, choose one of the following options.

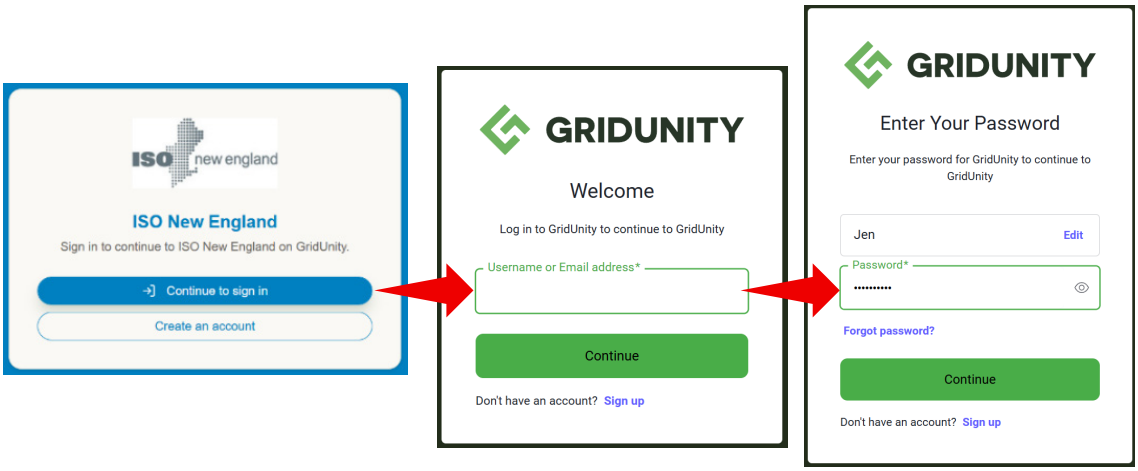


- ***Continue to sign in*** to log in with existing credentials.
- ***Create an account*** to create a new account as an administrator setting up an interconnection customer's org (see Section 2: Creating the Organization and Administrator Account) or as a consultant creating an affiliate firm.

>>> **Note:** Most users **should not** create a new account directly from the home screen. Instead, wait for your organization's administrator to send you an email invitation, which will automatically link you to the correct company profile.

Existing Users: Log in to GridUnity (Continue to sign in)

If you have an existing GridUnity account, follow these steps.



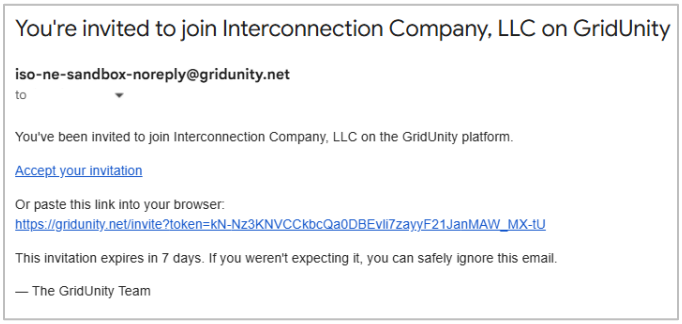
1. At the home screen, choose *Continue to sign in*.
2. Enter your username or email address and click Continue
3. Enter your password, and click Continue

>>> **Tip:** If you cannot remember your password, select the Forgot password? link.

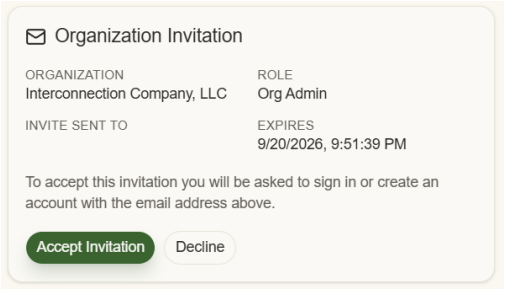
New Users: Accept an Invitation to Join an Organization

If you need an account to access GridUnity, you should ask the GridUnity administrator of the organization representing the interconnection company. When you receive an email invitation, follow the steps below.

1. Click the link in the email: Accept your invitation.

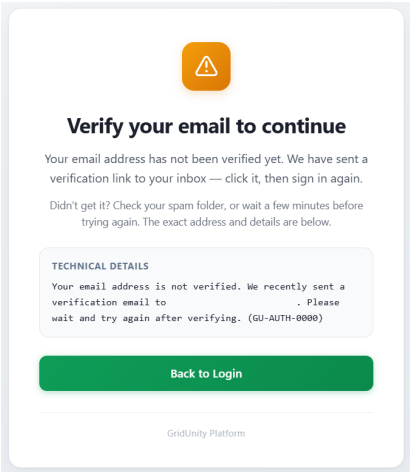


2. Click the Accept Invitation button on the page that opens.

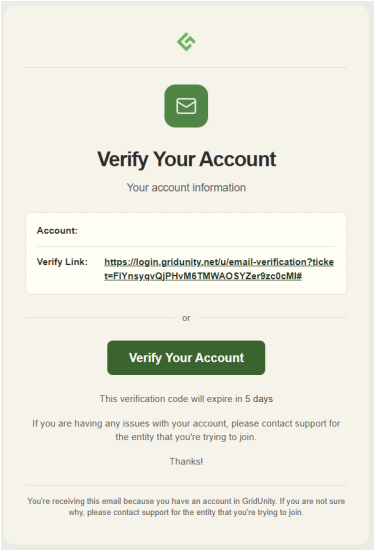


3. Use the same email address as in the invitation to create the account, and optionally add a user name.

4. Add a password and click Create Account. You will receive a message to verify your account.



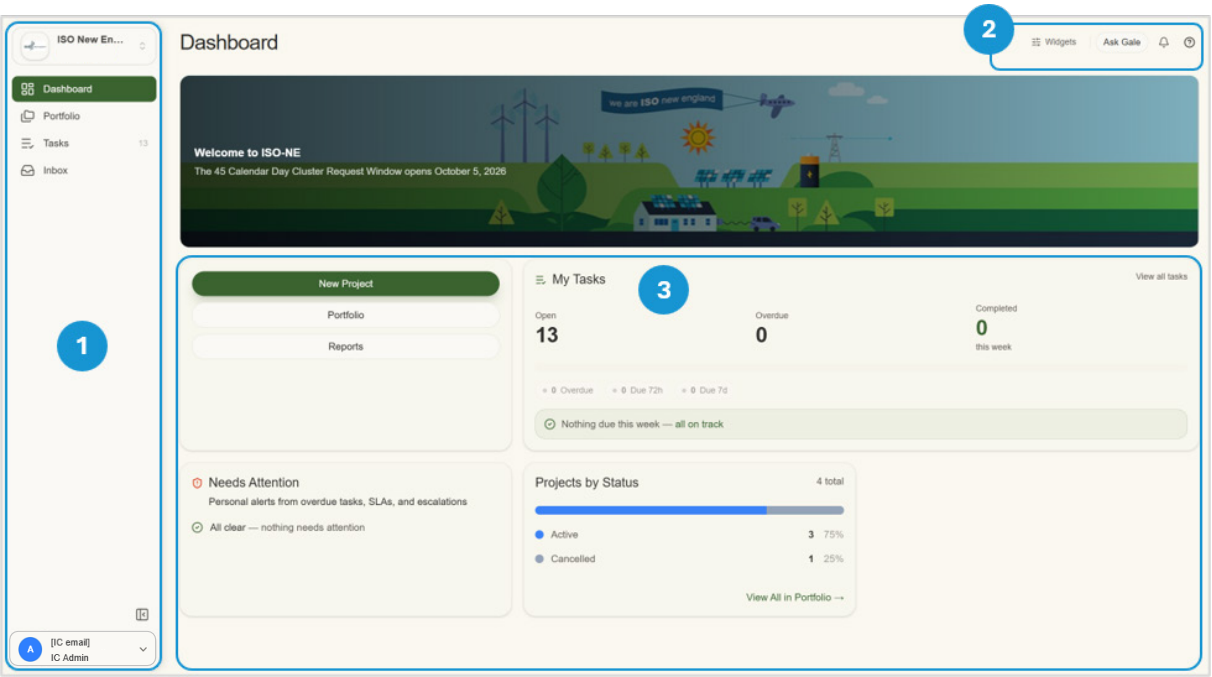
5. Check your email, and click on the Verify Your Account button in the email.



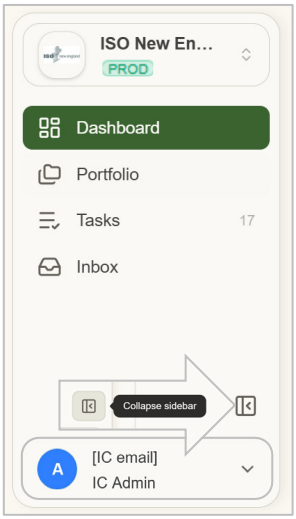
6. Log in using your new account.

Dashboard Components

The Dashboard is the main landing page in GridUnity and provides a personalized view of your work. From the Dashboard, you can navigate between platform workspaces, access tools and settings, and monitor project activity, tasks, notifications, and other information relevant to your role. The three primary areas of the Dashboard are the left navigation, the toolbar, and the widgets, or cards.



Left Navigation

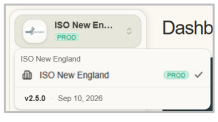


Navigate between the Dashboard, Portfolio, Tasks, and Inbox, switch tenants, and access user and organization settings through the User Menu.

To expand or collapse the navigation menu, click the collapse/expand sidebar icon.

>>> **Note:** If you have not yet created a project or been granted access to a project, the left navigation will be unavailable.

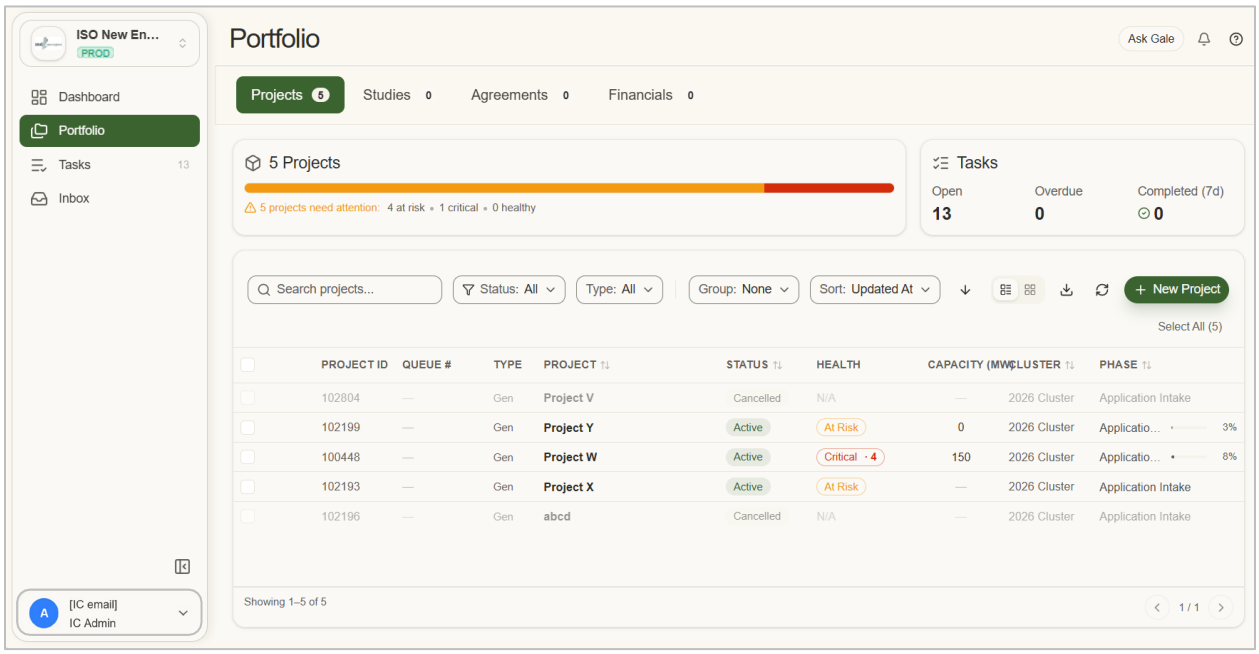
Switch Tenants



In some situations, you may be able to select between more than one Tenant. Use the Tenant drop-down to change tenants or to confirm the tenant where you are currently signed in.

Portfolio

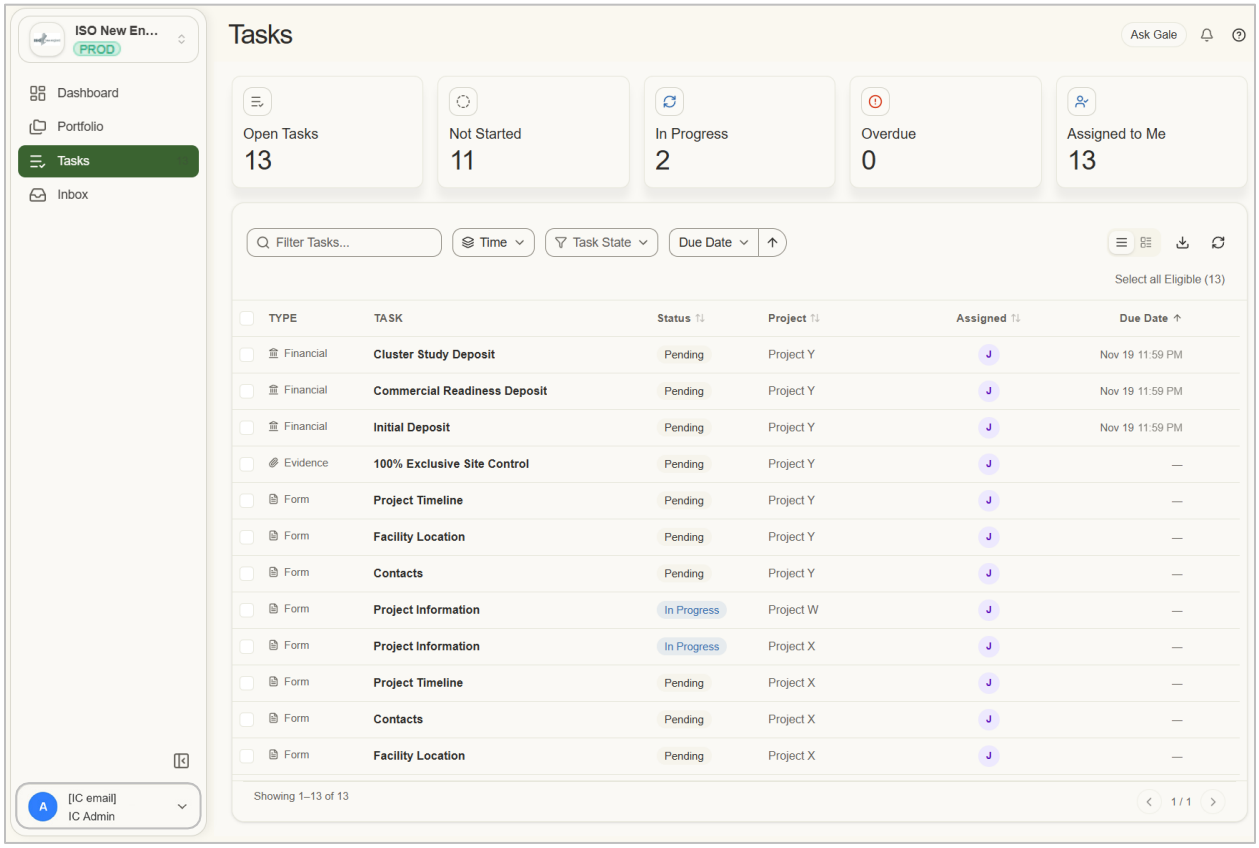
Portfolio is a cross-project analytics and management workspace to oversee multiple projects across various stages of the interconnection lifecycle. It provides a sortable and filterable grid of all your projects. There are four major sections of Portfolio: Project, Studies, Agreements, and Financials.



Your specific interconnection requests will appear under the Projects tab.

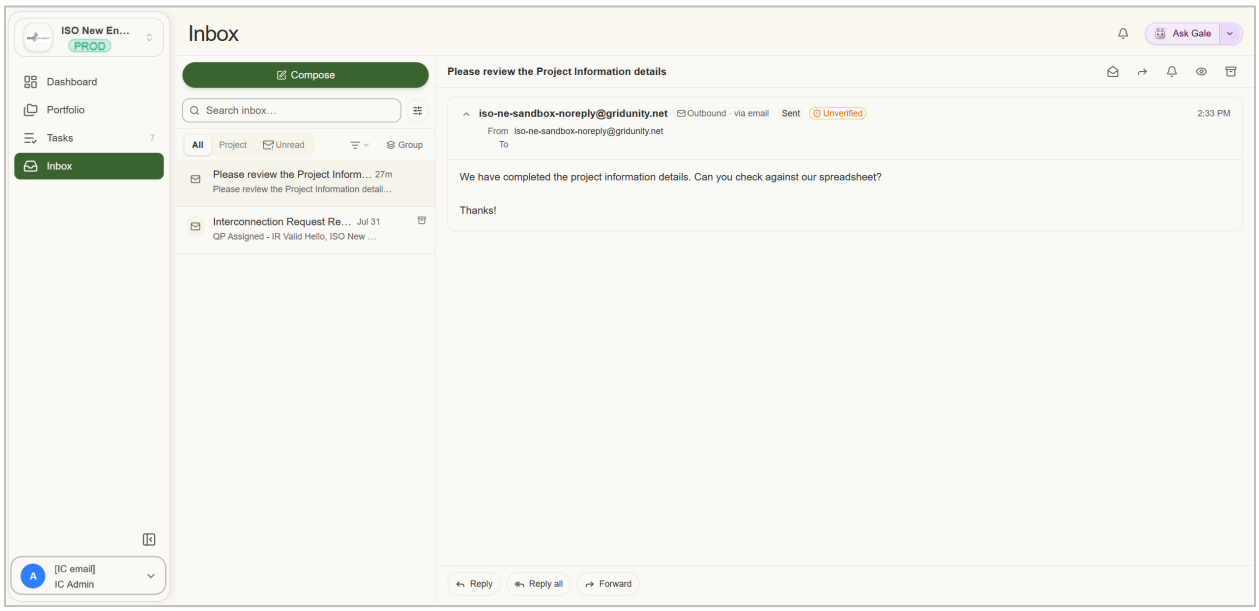
Tasks

The Tasks page is your cross-project work queue. It aggregates every task assigned to you or your team across all of your projects into a single list sorted by urgency, allowing you to track what is overdue or due soon without having to open each project individually. Selecting a task links directly back to its specific project workspace for full context. Note that these items also appear inside the individual project's dedicated Tasks tab.



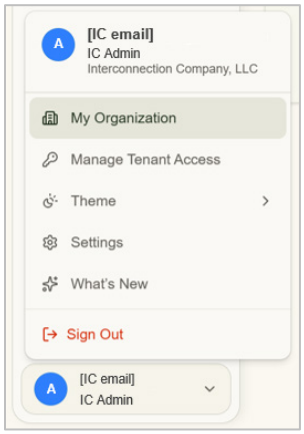
Inbox

The Inbox centralizes project-related conversations—including project threads, direct messages, and system emails—into one view where you can filter messages by project or unread status. Message sent from a specific project will appear both in this master Inbox and within that project's dedicated communications tab.



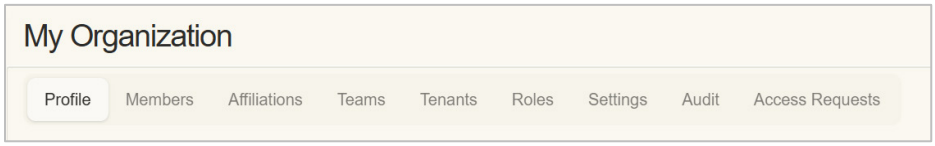
User Menu

The User Menu provides access to account, organization, and tenant management functions. Use it to manage your organization, access tenants, update personal settings, view product updates, and sign out of the platform.



The User Menu contains the following options:

My Organization

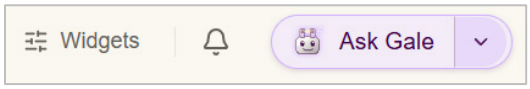


Manage organization information, members, affiliations, and teams, assign roles, adjust Single Sign-On (SSO) settings, and view audit and access requests.

- **Manage Tenant Access:** View available tenants, request access to new tenants, and switch between approved tenants.
- **Theme:** Change the appearance of the platform by selecting a preferred theme.
- **Settings:** Configure personal account preferences, application settings, and notification settings.
- **What's New:** View information about recently released features and platform updates.
- **Sign Out:** Sign out of the current GridUnity session.

Toolbar

Access dashboard tools, including widget settings, notifications, GALE AI, and help resources.



Widgets

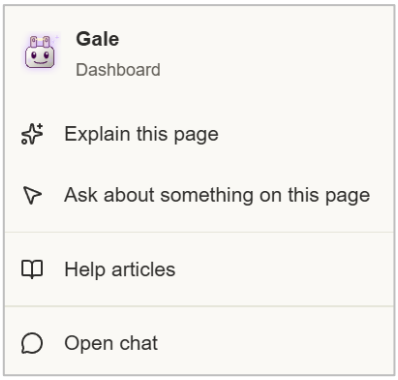
Select Widgets to customize your dashboard.

Notifications

The bell icon located in the Dashboard's toolbar provides direct access to your GridUnity notifications, which include platform messaging and task updates.

Ask GALE (Grid Analytics Learning Engine)

For getting quick answers about something on the page, or to access help articles, use the Gale AI assistant or the knowledge base.



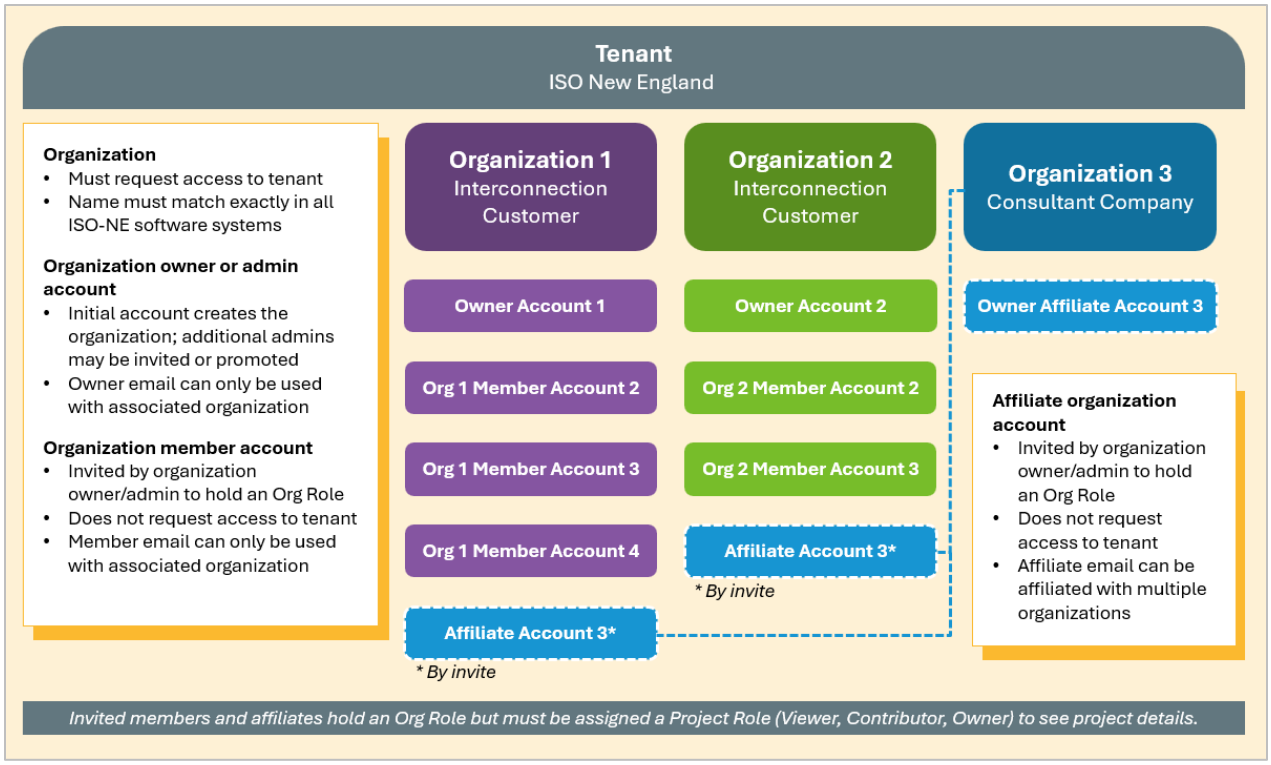
>>> **Please note:** ISO New England does not recommend using Gale AI to generate data. ISO New England strongly recommends thoroughly reviewing any AI generated data before submitting.

Widgets

Widgets provide configurable summaries of tasks, projects, portfolio status, and announcements that you can turn on or off to tailor the dashboard view to your own specific workflow.

4. Managing Account Access and Roles

From within an organization, account access in GridUnity is controlled at the organizational level and at the project level. It is critical to understand that organization roles and project roles are completely independent. For example, being an Organization Admin governs what you can do within your company's profile, but it grants no project access by itself. Your ability to view, edit, or submit a specific interconnection request is dictated entirely by your assigned project role. This section covers how to create accounts, group users into teams, and assign roles for both internal employees and external consultants.



Invite Member and Affiliate Accounts (Account Access)

There are two types of accounts that can be created in GridUnity:

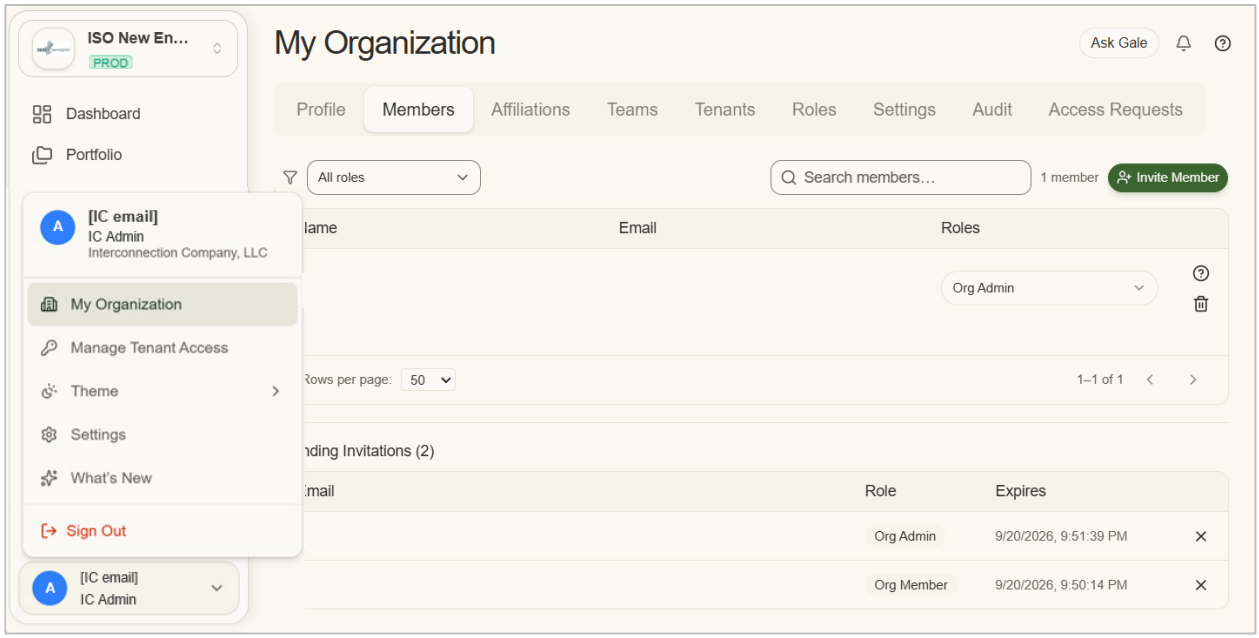
- **Member Accounts:** Employee of the organization (interconnection customer)
- **Affiliate Accounts:** Consultants or consultant companies (affiliations)

This section covers how to create and remove member and affiliate accounts.

Invite Member Accounts

From **User Menu > My Organization > Members** you can view active organization members, invite or revoke members, track pending member invitations, and change member roles (Org Admin or Org Member).

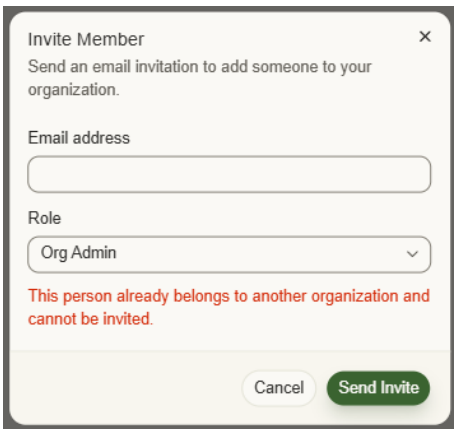
>>> **Please note:** Do not invite consultants as members; please use Affiliations instead.



Invite Members

Use the **Invite Member** button to add new users to your company.

1. Click the Invite Member button.
2. Enter the email address.
3. Assign a role (Org Admin or Org Member).



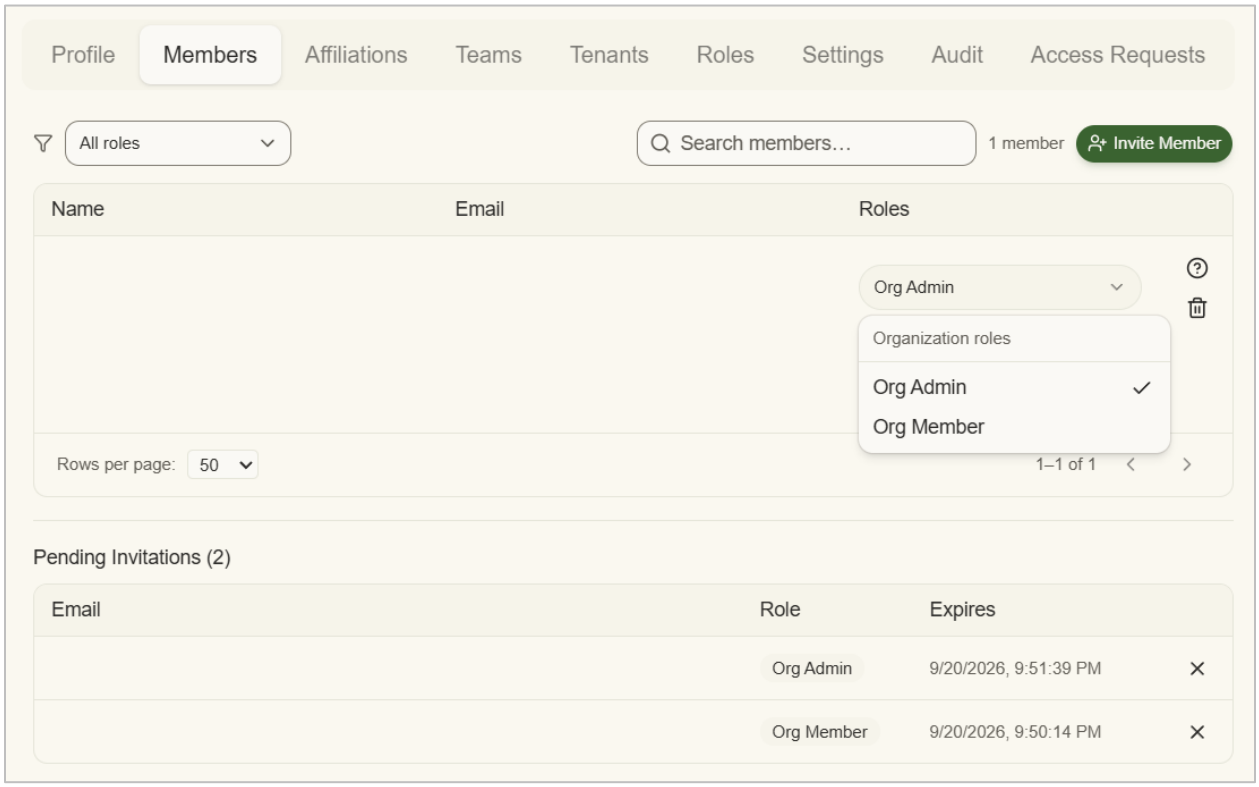
The invited member will be listed under Pending Invitations.

>>> **Please note:** If a user's email address is already associated with a different organization in GridUnity, the system will display a red error message.

Change Roles or Revoke Member Access

Organization administrators can manage an organization's membership and roles. Follow these steps to change a user's role or remove them from your company entirely:

Change a role



1. Locate the specific member in the Members list.
2. Click the dropdown menu under the Roles column.
3. Select the new role (Org Admin or Org Member).

Revoke access

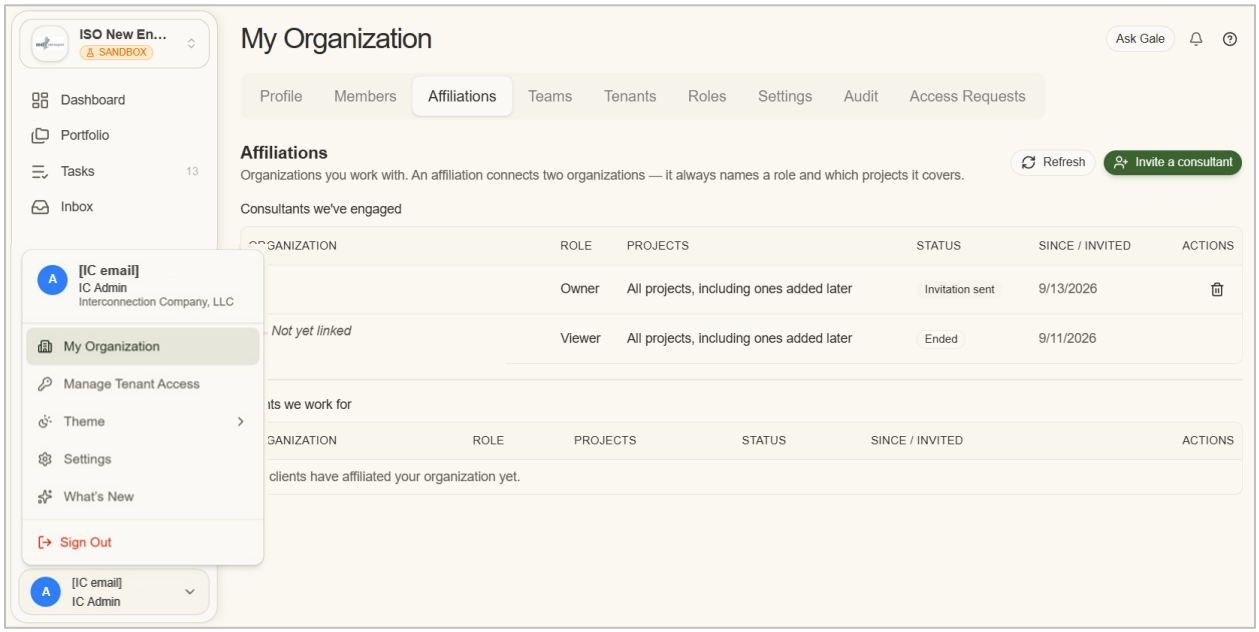
If you need to remove a member for any reason (for example, accidentally inviting a consultant to be a member, or if an employee leaves the company), you should revoke their membership to your organization in GridUnity.

1. Locate the specific member in the Members list or under Pending Invitations.
2. Click the trash can icon to the right of their row to remove from the organization.

>>> **Important note:** Revoking membership to a member account does **not** remove project-level access granted from directly within a project. You must also remove access from each individual project where the member account was invited.

Invite Affiliate Accounts (Consultants)

From **User Menu > My Organization > Affiliations** you can view active personnel, invite or revoke members, track pending invitations, and change roles (Org Admin or Org Member).

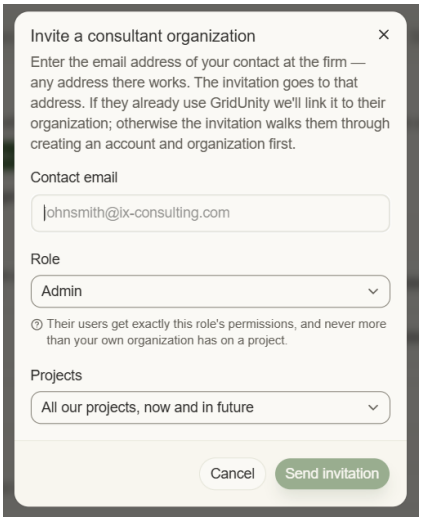


Inviting Affiliates

Use the **Invite a consultant** button to add new users to your company.

1. Click the Invite a consultant button.
2. Enter the email address.
3. Assign a role (Admin, Contributor, or Viewer).
4. Click Send invitation.

The invited affiliate organization will be listed under *Consultants we've engaged* in Affiliations.



Change Roles or Revoke Affiliation Access

Organization administrators can manage an organization's membership and roles. Follow these steps to change a user's role or remove them from your company entirely:

Change a role

1. Locate the specific member in the Consultants list.

2. Click the dropdown menu under the Roles column.
3. Select the new role (Admin, Contributor, or Viewer).

Revoke access

If you need to remove an affiliate account for any reason (for example, accidentally inviting a member to be an affiliate, or if a contractor ends their services with your organization), you should revoke their membership to your organization in GridUnity.

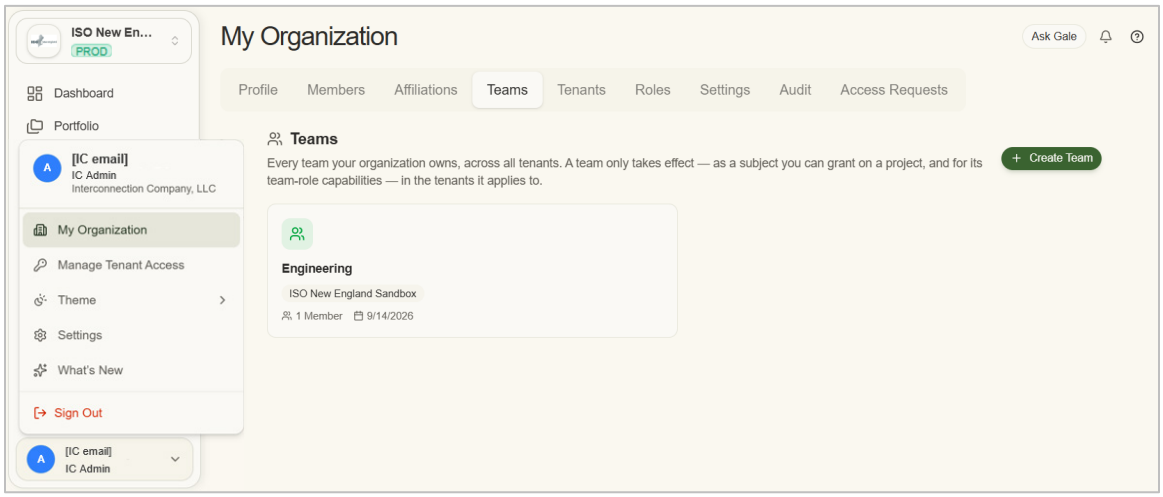
1. Locate the specific affiliate in the Consultants list or under Pending Invitations.
2. Click the trash can icon to the right of their row to remove from the organization.

>>> **Important note:** Revoking membership to an affiliate account does **not** remove project-level access granted from directly within a project. You must also remove access from each individual project where the affiliate account was invited.

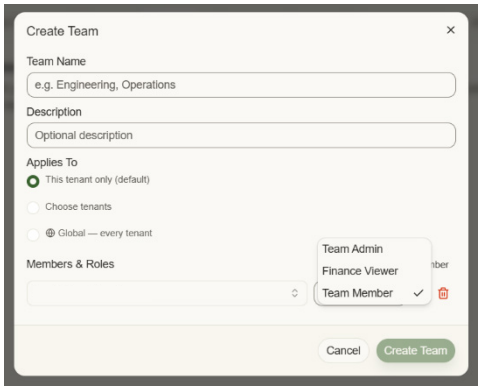
Manage Teams (Group Access)

Teams are named groups within your organization in GridUnity that allow you to grant project access or assign work to multiple people all at once. Once you create a Team and assign teammates, you can then assign roles to that team.

From **User Menu > My Organization > Teams** you can view active Teams or create new ones. By grouping users together, Organization Administrators can streamline permissions rather than managing access individually.



Create a Team

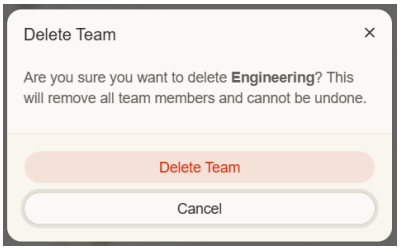


Follow these steps to create a Team in GridUnity.

1. Click the Create Team button.
2. Add a Team Name.
3. Add a description if needed.
4. Select the first team member, and select their Team Role (Team Admin, Finance Viewer, or Team Member).
   » Note: If you do not see a person on the list, check to see if that person has a member or affiliate account in your organization.
5. Use the Add member button to add additional team members.

» Please note: After creating a team, you must assign Roles to the team. Set Org Roles via User Menu > My Organization > Roles. Set Project Roles from within the desired project.

Delete a Team



1. Select the Team
2. Click Delete Team

Deleting a Team will remove accounts from the team and revoke role access that was assigned via that Team, but it will not affect member or affiliate accounts. Deleting a Team cannot be undone.

Setting Account Roles

GridUnity manages access through two types of roles: organization roles and project roles.

Organization role (Org Admin or Org Member): governs your company profile and shapes how much of the organization's shared access reaches you. Being an Org Admin gives you no project access by itself; you must be explicitly assigned a project-level role to view or edit an interconnection request.

Project role (Owner, Contributor, Viewer): dictates exactly what you can do on a specific project.

5. Completing a Project (Interconnection Request)

This section outlines the process for creating, preparing, reviewing, and submitting your interconnection request (IR). Each IR is managed as a project within GridUnity to organize application information, supporting documentation, tasks, communications, and access control. Every project has a dedicated project workspace.

Workflow: Complete a Project

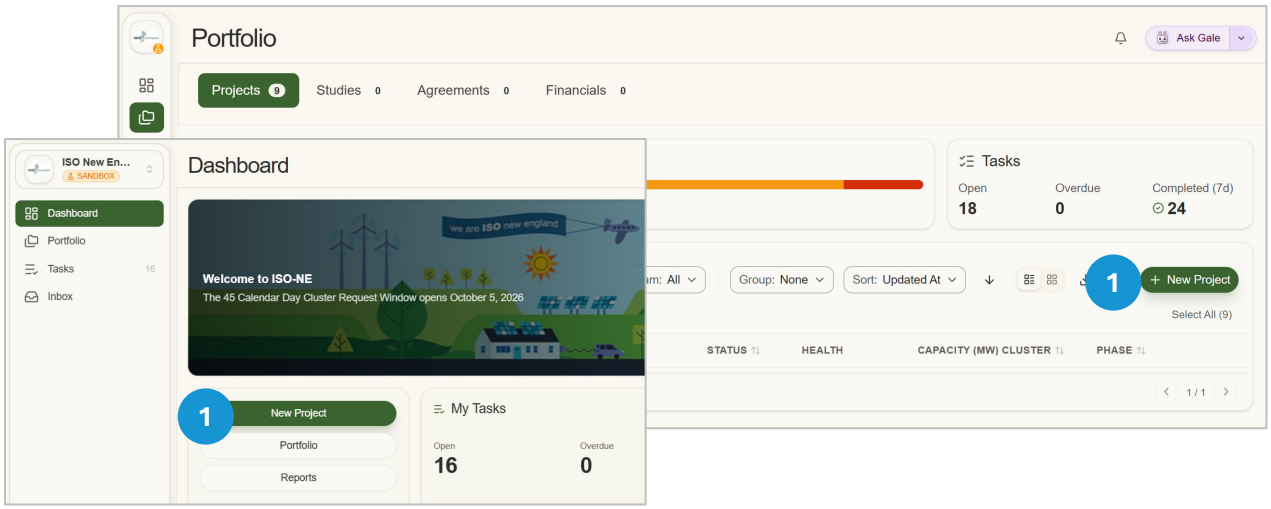
Completing your IR requires accessing your active portfolio, configuring appropriate access, and completing all assigned tasks prior to final submission.

Before submission, organizations must ensure the appropriate team members and consultants have been granted access and assigned the correct roles to execute the recommended preparation workflow:

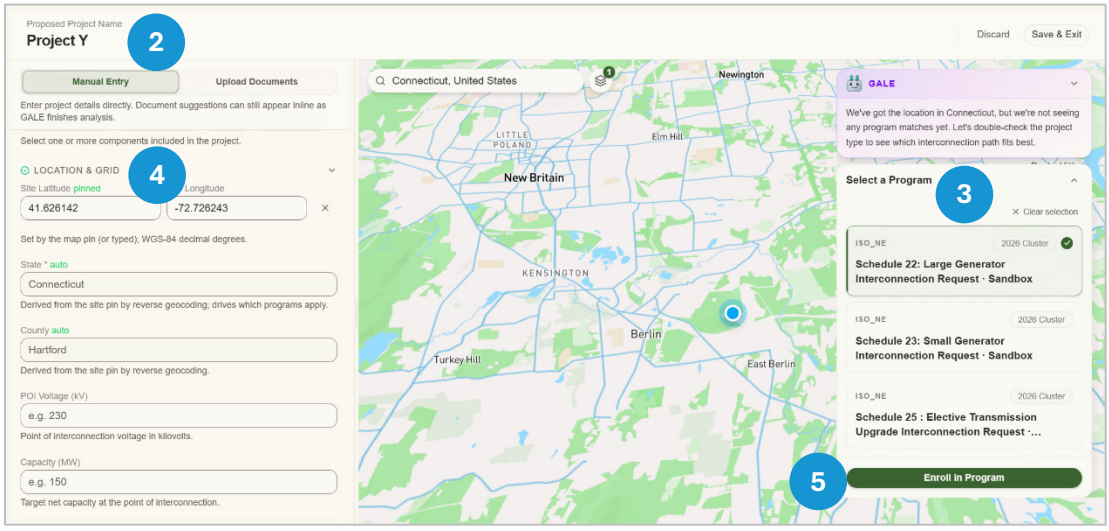
1. Create and save draft project.
2. Enroll employees or invite affiliates to access project.
3. Set project roles for each user account.
4. Assign and complete tasks.
5. Review the project for completeness.
6. Submit the project.

Create a New Project (Interconnection Request)

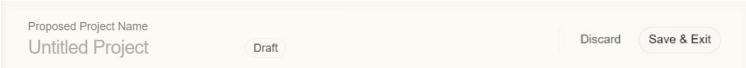
Before entering your technical data, you must establish the project workspace. The minimum information to create a new project is a project name, program, and location.



Follow these steps to create a project in GridUnity's GridInterConnect for Transmission.



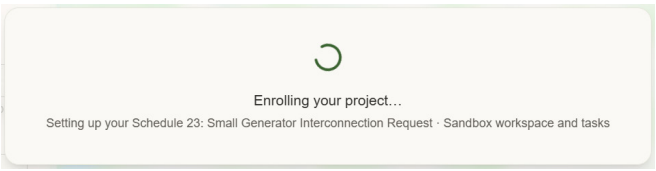
1. **Start a Draft:** Click the **New Project** + New Project button from your dashboard or portfolio.
2. **Name the Project:** Enter a project name that is 128 characters or less. If you only enter the name and select Save & Exit, the system saves a draft in your Portfolio in the "Discovery" phase. Selecting Discard will permanently delete the project.



3. **Select a Program:** Choose your required interconnection procedure from the menu (e.g., Schedule 22 for Large Generators, Schedule 23 for Small Generators, or Schedule 25 for Elective Transmission Upgrades).

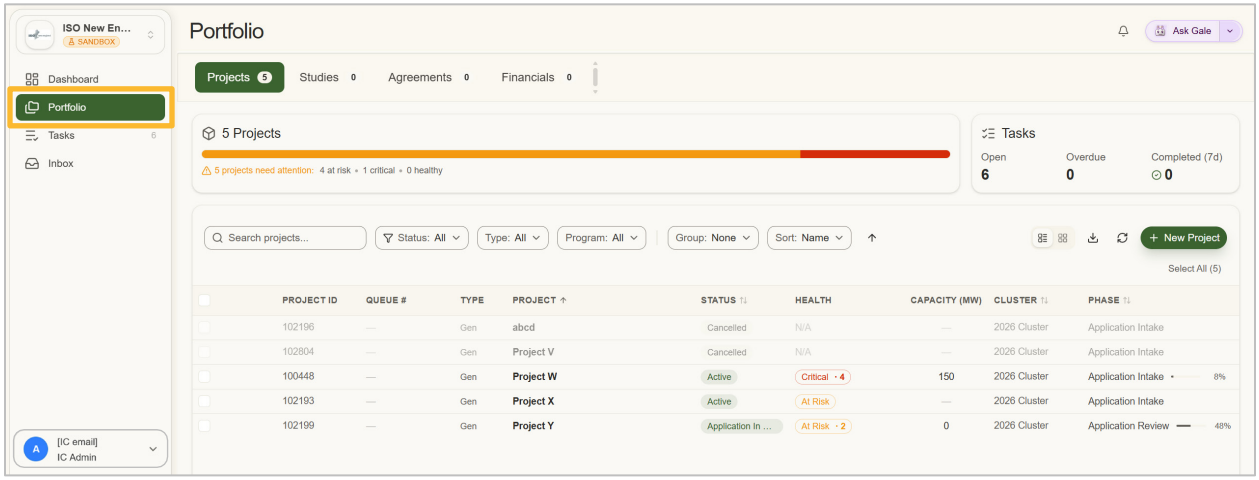
>>> **Important note:** You cannot change the program selection once you click enroll, though the project name and location can be edited later.

4. **Set the Location:** Identify the project site by entering latitude and longitude coordinates, using the search field to search for a specific address, or clicking directly on the interactive map to drop a pin.
5. **Enroll:** Click the **Enroll in Program** button. The system will generate your workspace and open the project directly to the **Overview** tab.



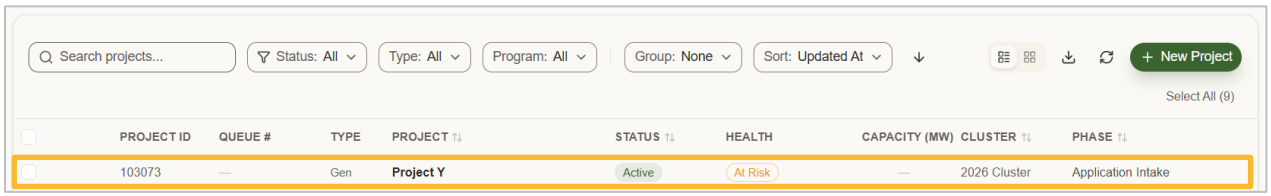
Access Existing Projects (via Portfolio)

Select **Portfolio** from the primary left navigation menu. The **Projects** tab is the default view. This is where you will see any project that you created, projects directly assigned to you, or projects that are inherited through your organization or team. If the table is empty, no projects have been granted to you or your organization yet.



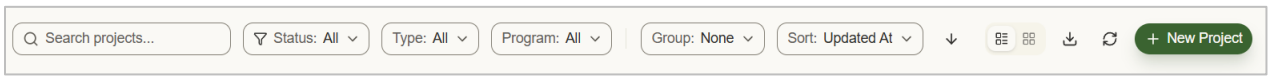
Find and Open a Project (Project List)

Click anywhere on a project's row to open its Project Workspace on the Overview tab. Click individual column headers (such as Project ID, Status, or Phase) to sort ascending or descending.



Project List Controls

Use the controls at the top of the Project List to search, sort, filter, export, or refresh projects on the Project List. You can also create new projects from the Project List.



- **Search:** Use this text field to locate specific requests by project name or ID.
- **Filters:** Narrow the list of projects by Status, Type, and Program.
- **Group:** Group projects by Cluster, Status, Phase, or Facility Type.

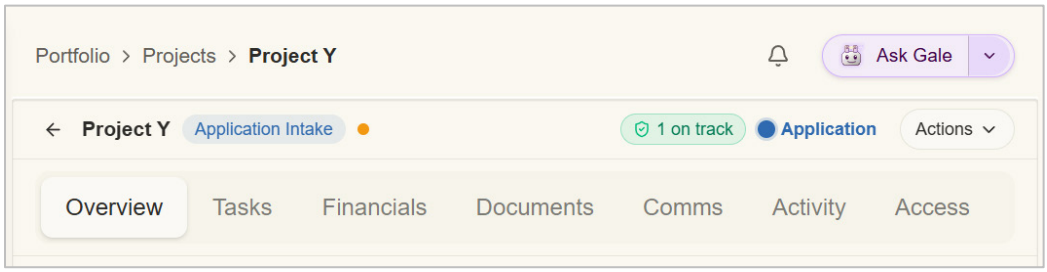
- **Sort:** Order the projects by Updated At, Created At, Name, Status, Project Type, Facility Type, IC Phase, IC Stage, and Cluster. Toggle the adjacent arrow to switch between ascending and descending order.
- **Toggle View:** Switch between list view and grid view.
- **Export Controls:** Click the download icon to export the current portfolio grid data.
- **Refresh:** Manually refresh the list to ensure you are viewing the most recent updates.
- **New Project:** Create a new project.

Navigate a Project's Workspace

The project workspace is the detailed view for a single project, bringing together its current stage, tasks, documents, financials, communications, activity history, and access grants into one tabbed view.

Top Header & Status Indicators

At the top of the screen you will find the status showing where your project sits in the intake process. The top right corner provides quick access to notifications, help, and the Ask Gale AI assistant.



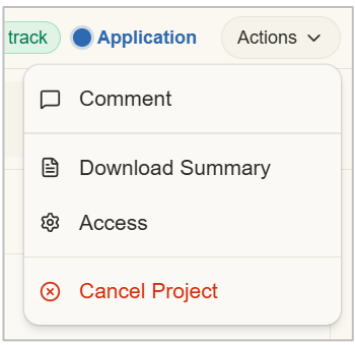
Actions Menu

This dropdown allows you to leave a comment, manage access, cancel or withdraw the project, and download a PDF summary of your application to review your entered data.

Comment: Add a message or note directly to the project workspace.

Download Summary: Export a PDF summary of your application. This allows you to review the data you have (or have not) entered so far, even if the application is incomplete.

Access: Open the project's access settings to view, grant, or modify which users and organizations have permission to view or edit the request.

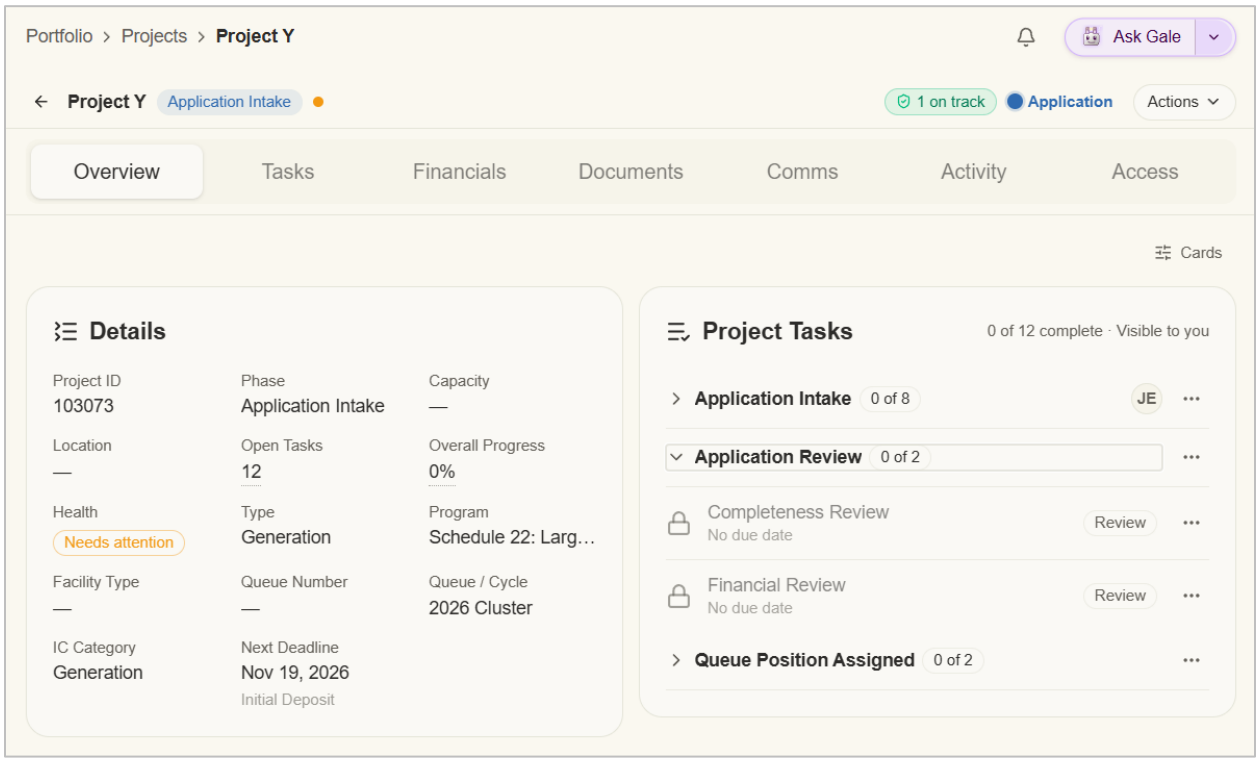


>>> **Note:** Only accounts assigned as project owners can make changes to access.

Cancel Project: Project owners and contributors can permanently terminate a project. Once confirmed, a cancelled project cannot be recovered, though it will remain visible in your Portfolio with a "Cancelled" status for your records.

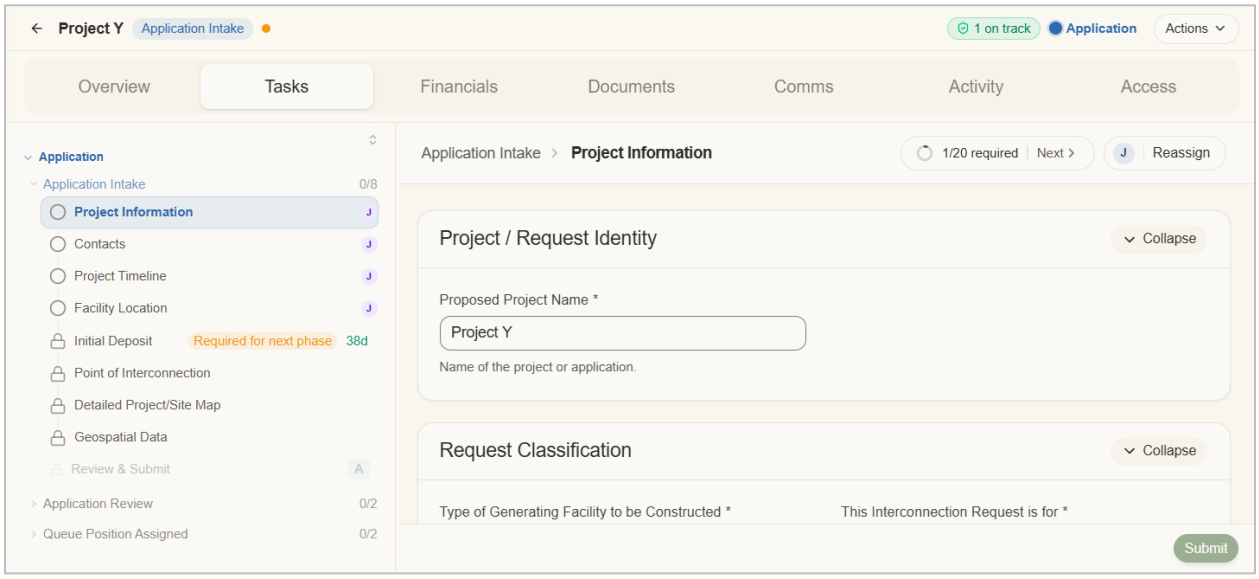
Overview Tab

This is the default screen you will see when you open a project. The Overview tab displays high-level project details (such as Project ID, location, program, queue number, and health status) alongside a progress summary of your open project tasks.



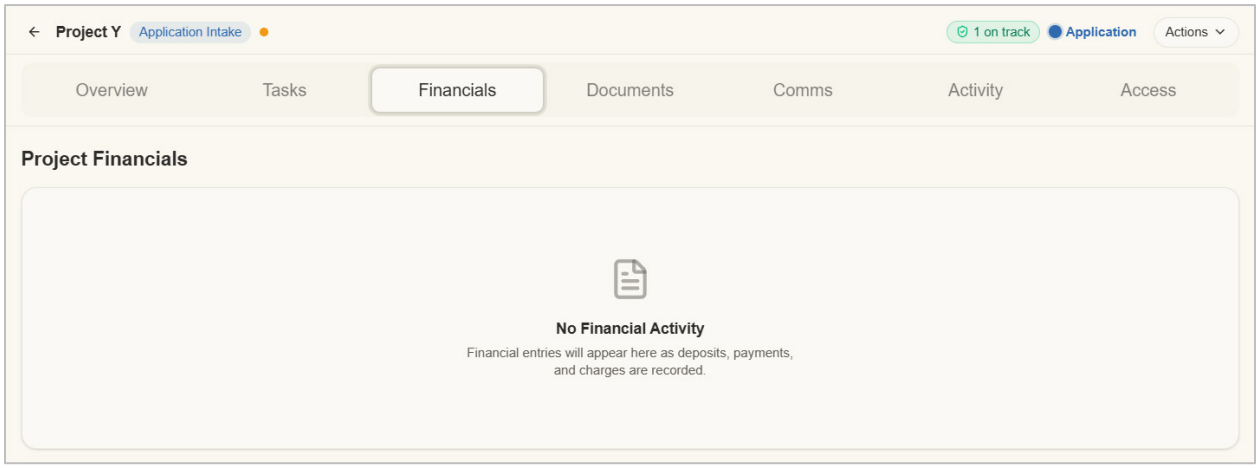
Tasks Tab

Located directly to the right of the Overview tab, this is the workspace where you will enter and submit your actual Interconnection Request (IR) application.

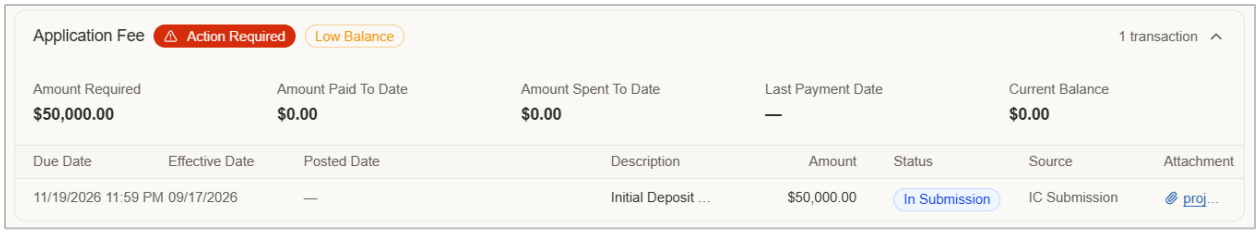


Financials Tab

The Financial tab tracks required amounts, paid balances, and due dates for your application fee, study deposit, and commercial readiness deposit.

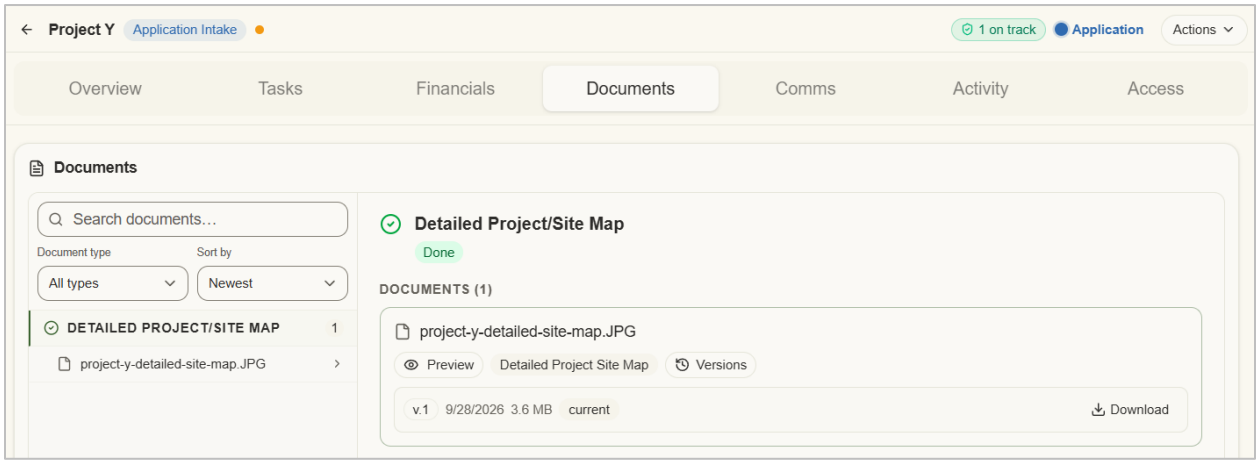


Once submitted, you will see additional details (such as the effective date and status) and links to the attachment uploaded.



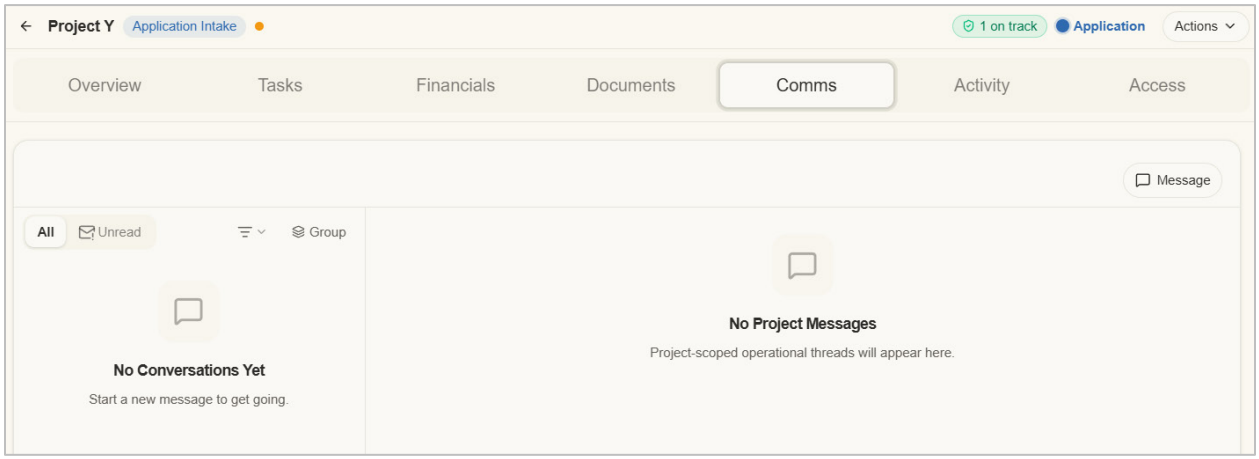
Documents Tab

The Documents tab centralizes all uploaded files, dynamic models, and submitted evidence for the project. As you add new documents throughout the project lifecycle, you can see them here.



Comms Tab

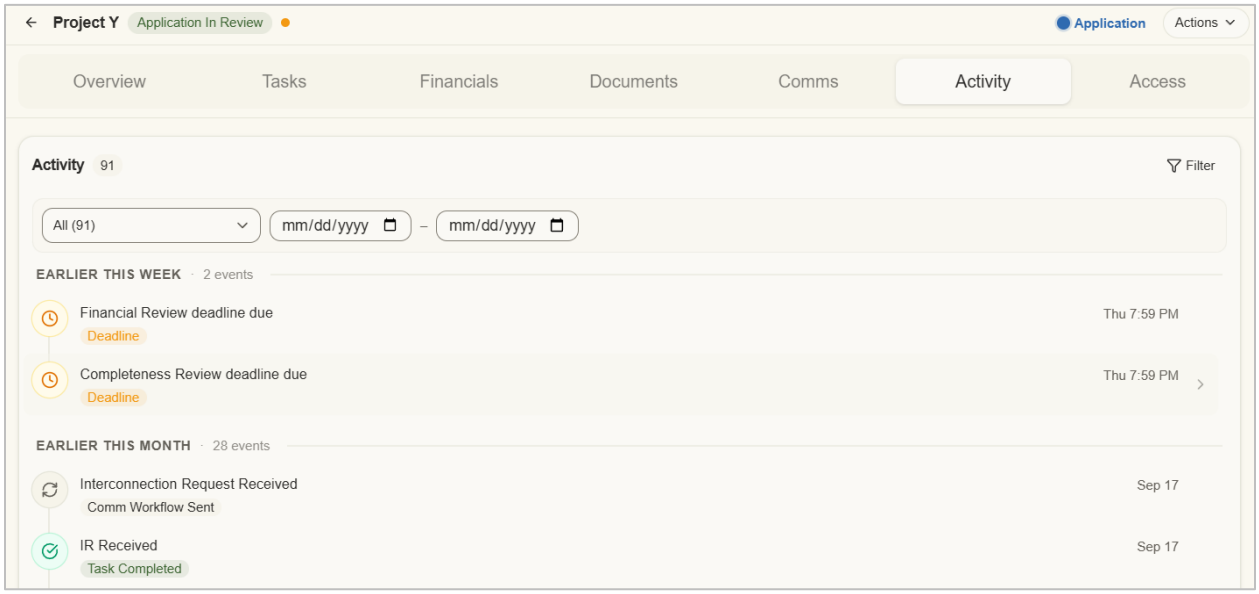
The Comms tab displays all project-related conversations, meaning any message sent from a project will appear both in this tab and in your global Inbox (on the left navigation). Please note that you may only message to other accounts that are associated with the project.



Activity Tab

The Activity tab provides an audit trail of the project's history and upcoming deadlines.

By default, activities completed within the project will show in chronological order. You can use the filter toggle to filter by specific task types that can be completed in a project.



Access Tab

The Access tab displays every individual, team, and organization granted permission to view or work on the project. The account that creates a project is designated the owner of the project by default.

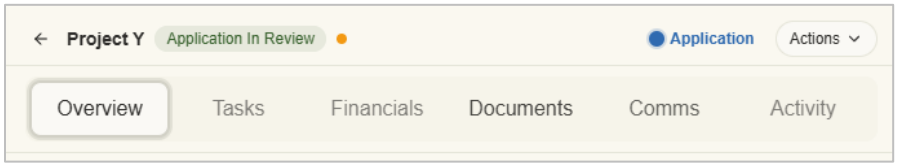
>>> **Note:** Project-level access is independent from organization-level access. Being an Organization Admin gives you no project access by itself; you must be explicitly granted a project role here to view or edit an interconnection request.

Available Roles

There are three project roles that can be assigned to an account. If you are the project owner, you can assign these roles when granting new access, and you can change the roles assigned as needed.

- **Viewer:** Read-only project access
- **Contributor:** Manage project work without project access administration
- **Owner:** Manage project work and access administration

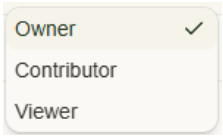
Only accounts assigned as project owners can see and make changes in the Access tab. Individuals with Contributor or Viewer access will not see the Access tab.



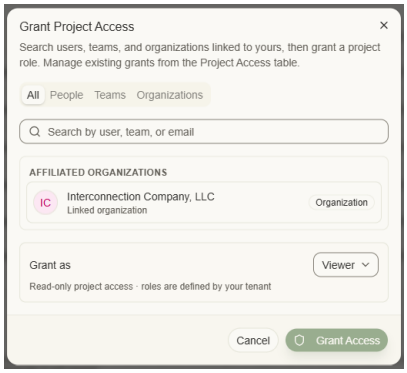
Grant New Access

1. Click the green Add Access button to grant project permissions to new users, teams, or linked organizations.

2. Search for the person, team, or organization. If you do not see the person or organization account listed, you may need to add them to your organization. See the Section 3 (to invite internal members) or Section 4 (to invite external affiliates) to learn how to invite accounts to join your organization.
3. Select the role they will hold.

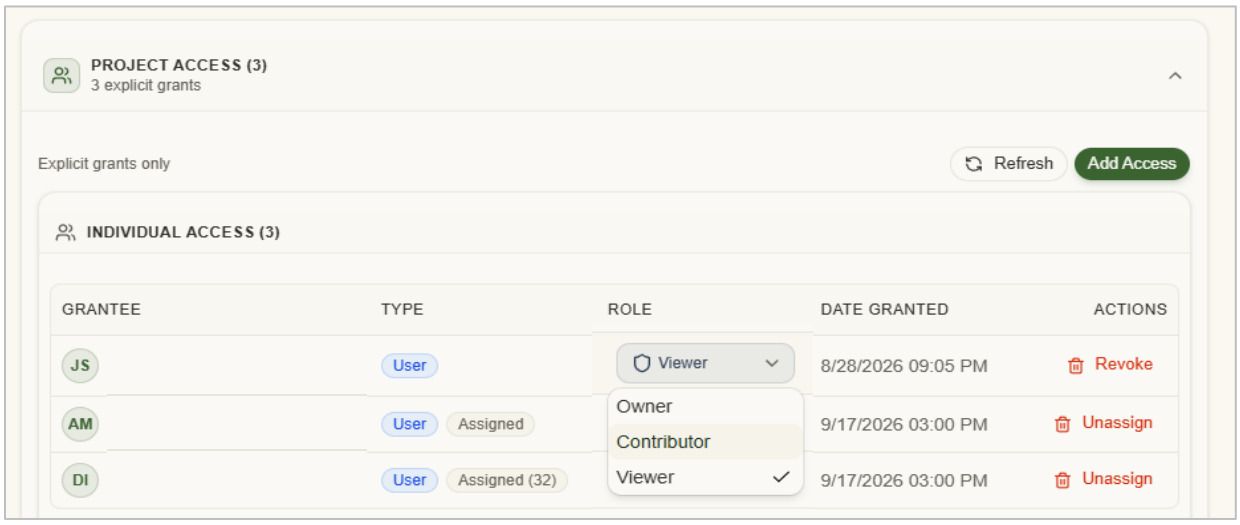


4. Click Grant Access.



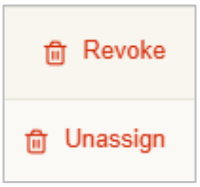
Manage Existing Roles

Locate a user in the **Individual Access** section. If you have Owner permissions, you can modify an explicitly granted user's role using the dropdown menu in the Role column. Operator-assigned roles (such as a Reviewer) may only be Unassigned from this dropdown. Click the **Refresh** button to update the screen with the most current access list.

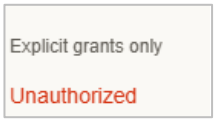


1. Locate a user in the **Individual Access** section.
2. Click the dropdown menu in the Role column to modify an explicitly granted user's role. *Note: Operator-assigned roles (such as a Reviewer) display a lock icon and cannot be changed from this dropdown.*

Remove (Revoke) Access



Click the red trash can icon in the Actions column to remove a user from the project.



- **Revoke** removes explicitly granted users (like an Owner).
- **Unassign** removes operator-assigned roles.

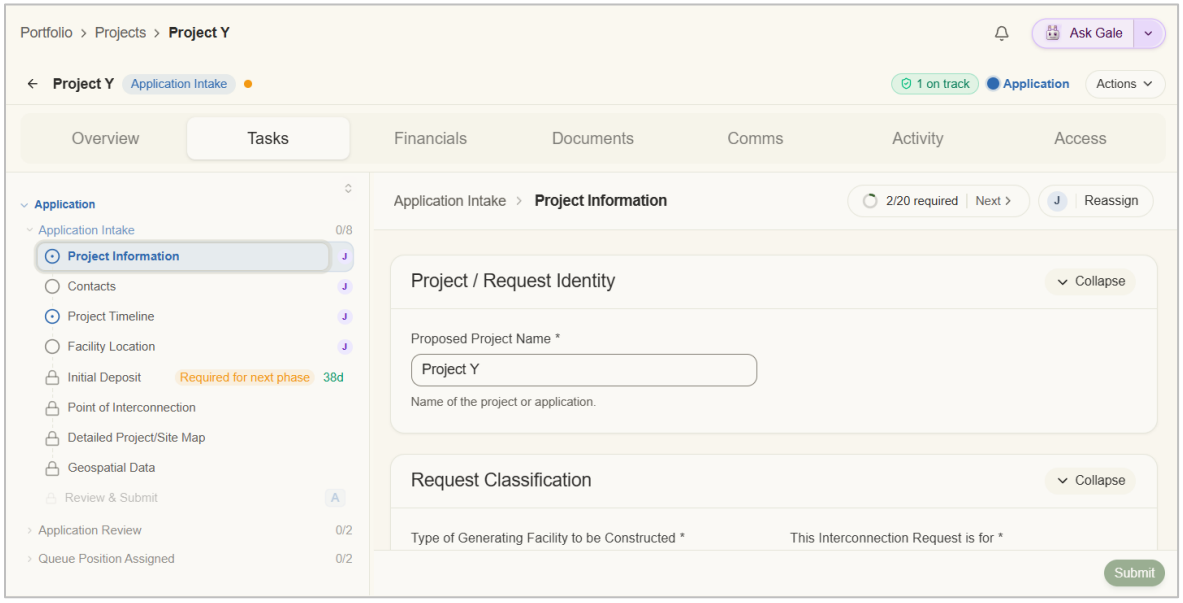
If you remove project ownership of the account you are using to manage project access, you will see an Unauthorized message and will be unable to make additional changes on that project.

Complete Project Tasks (Application Intake)

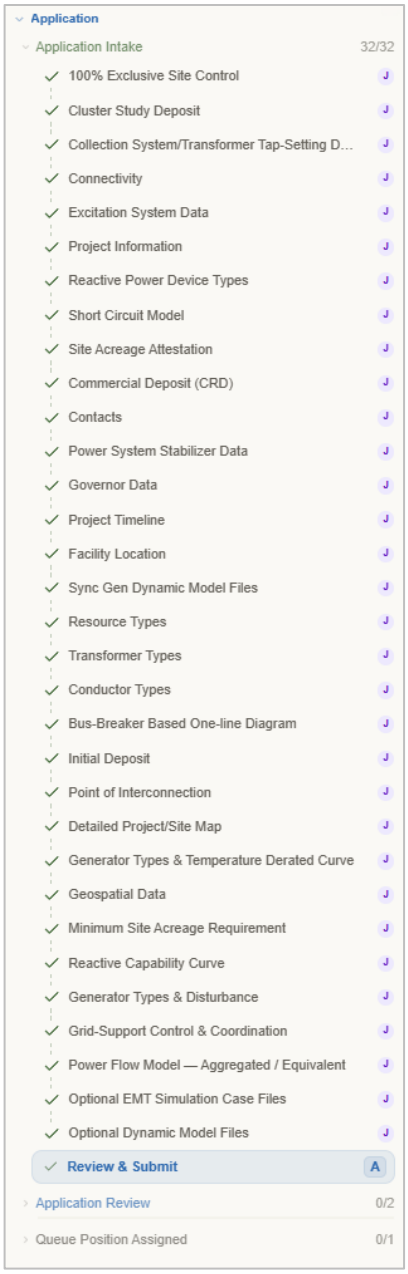
The Application Intake process guides you through the information, documentation, and tasks required to prepare your interconnection request for submission.

To complete the application intake, click the **Tasks** tab located at the top of the project workspace to enter your data.

>>> **Note:** Do not confuse Project Tasks with the Tasks tab on the global left navigation menu, which shows a high-level status of tasks across your entire portfolio.



Navigate with the Application Pane



The left-hand navigation pane lists the Application Intake sections (e.g., Project Information, Contacts, Initial Deposit), the Application Review, and the Queue Position Assigned.

Pay attention to the status icons to the left of each item to track your progress:

- **Open Circle:** Section is open and ready for data entry.
- **Circle with a Dot:** Section is currently in progress.
- **Checkmark:** All required fields are complete.
- **Lock:** A previous step must be completed before this section unlocks and accepts data.

>>> **Tip:** To better view the list of application sections, hover your cursor over the vertical line between the left menu and the center form, then left-click and drag the line to the right.

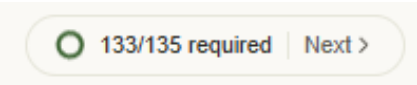
Application Intake Sections

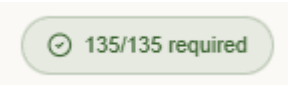
The project Application intake has 32 total sections for an LGIR or SGIR and 21 sections for an ETUIR, but you will not see all of them when you start a new project. The entries you make as you complete the application will determine which fields will appear.

Enter Application Intake Data and Upload Documents

Fill out the forms in the center workspace. When a section requires documentation, click to upload your files. Ensure you only submit the accepted file types listed on the upload screen.

Click the **Next** button at the top right of the workspace to automatically jump to the next incomplete field. As you complete requirements, previously locked areas of the application will automatically unlock.





The **Submit** button at the bottom right remains grayed out and cannot be clicked until all required fields in a section have been completed. Once all mandatory data is entered and supporting files are uploaded as needed, the button will activate, allowing you to submit the application.

>>> **Warning:** Verify any Gale AI data entry. As you complete the Application Intake forms, you may encounter data fields that recommend auto-populating with GALE data. You can identify these specific entries by looking for a purple AI-filled badge next to the data. While GALE is designed to support form-filling and streamline your workflow, you must carefully review and verify all AI-suggested values for accuracy before advancing to the next section. The Interconnection Customer is solely responsible for ensuring all submitted project data is correct.

Submit Documents

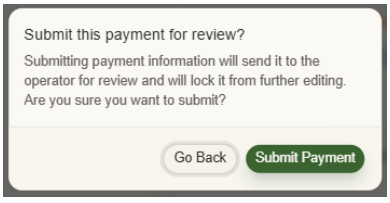
Certain tasks require uploading digital files. While the process is easy, be sure to select the appropriate files for each task. Some tasks require specific file types, and the upload will be rejected if the wrong file type is selected. Be sure to click the Submit or Submit Evidence button to confirm.

>>> **Note:** Once added, you may not delete a submitted document. You may replace a document with a new version if needed.

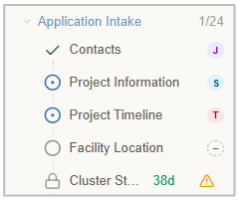
Submit Payment Documentation for Review

To confirm you have submitted a payment, you will be required to submit evidence of the payment. Payment information is sent to ISO New England for review.

>>> **Note:** Submitting payment information will lock it from further editing.

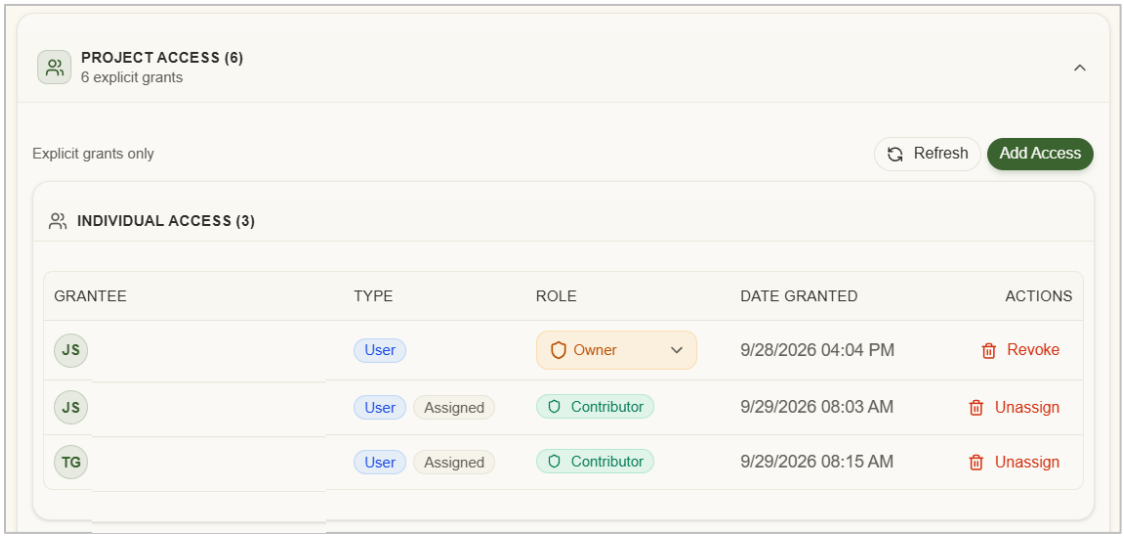


Assign, Reassign, and Unassign Tasks



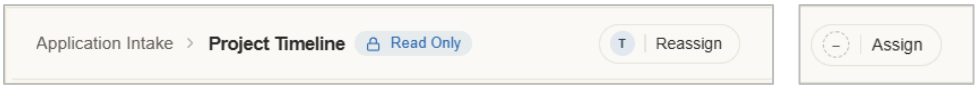
Project owners and contributors can assign and manage project tasks directly from the application intake list on the project workspace **Tasks** tab.

>>> **Note:** You cannot assign a project task to a member or affiliate account until the account is granted an active role on that specific project via the project's Access tab.

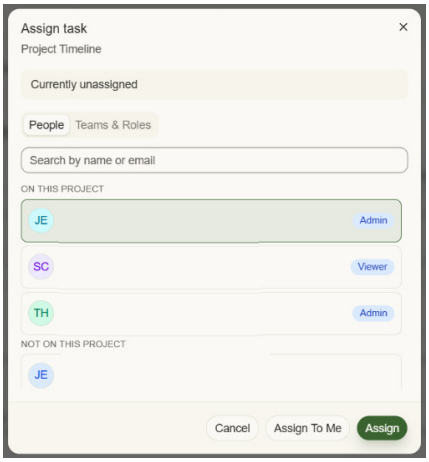


Assign or Reassign a Task

1. Click the assign icon on the far right of the specific task in the application list.



2. Use the **Search by name or email** field in the "Assign task" dialog box, or browse the **People** and **Teams & Roles** tabs to find the correct user.



3. Select an account from the ON THIS PROJECT list.

   Note: If you are trying to add an account that is not listed, first add the account to the project via the project's Access tab.

4. Click the **Reassign** button to delegate the task to the selected user, or click **Assign To Me** to immediately take ownership of the work yourself.

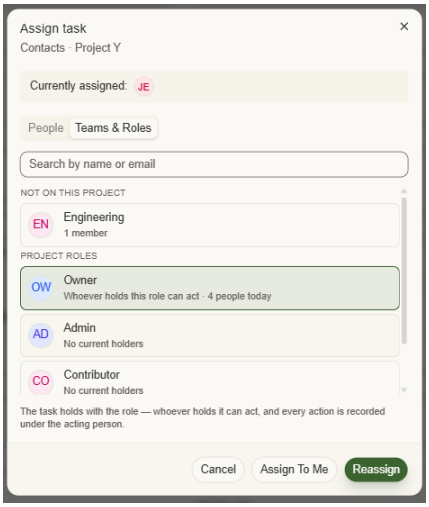
Unassign a Task (Reassign to Owner Group)

To unassign a single task without reassigning it, you must reassign the task to the Owner group.

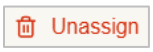
1. Click the initials of the currently assigned user next to the task.
2. Clear the assignment to trigger the unassign confirmation window.
3. Click the red **Unassign** button to confirm. This removes the user and returns the task to an unassigned state, but it does not affect the person's overall access to the rest of the project.

Unassign All Project Tasks from an Account

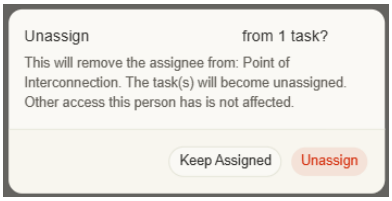
To unassign a member account, affiliate account, or Team from all assignments in a project, navigate to the project's Access tab and then follow the steps below.



1. Next to the Individual or team grantee, find and select Unassign.

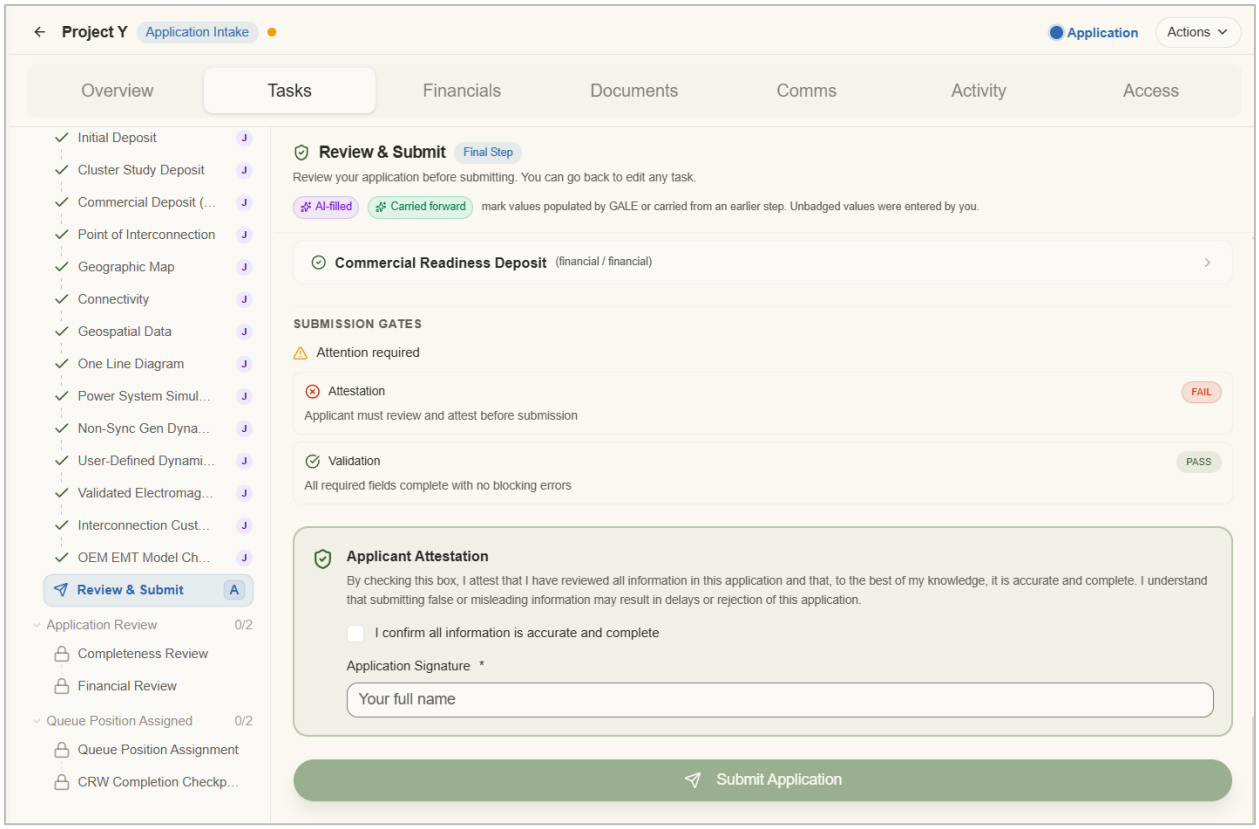


2. At the warning message, select Unassign.



Review and Submit Application

Once all application sections are complete, you can finalize your interconnection request from the **Review & Submit** task at the bottom of the Application Intake list.



Review Your Data

Review your entered tasks before submitting. You can identify automatically populated data by looking for the purple AI-filled or green Carried forward badges, which mark values generated by GALE or pulled from an earlier step.

Clear Submission Gates

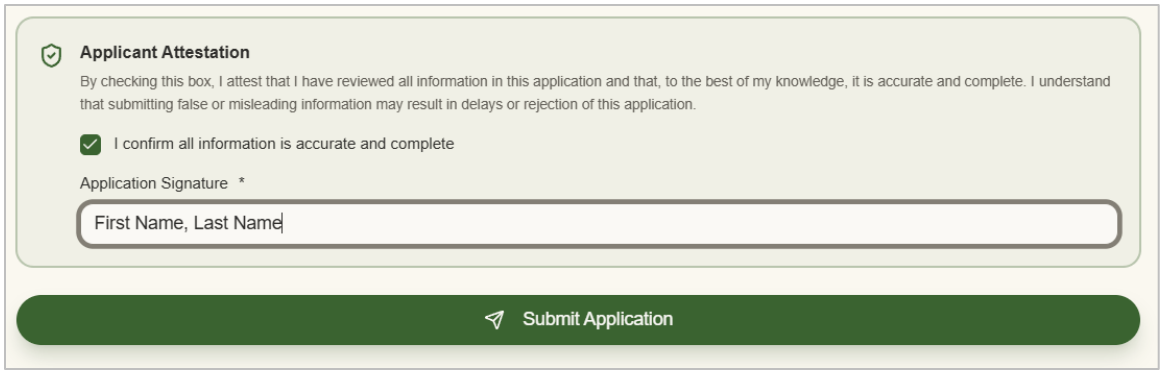
Check the SUBMISSION GATES section. The Validation gate must display "PASS", indicating all required fields are complete with no blocking errors. Note that until you sign the Attestation, it will display FAIL.

Sign the Attestation

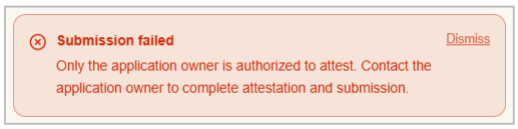
Read the Applicant Attestation, check the box to confirm all information is accurate and complete, and type your full name into the **Application Signature** field. Doing this clears the Attestation gate.

Submit Application

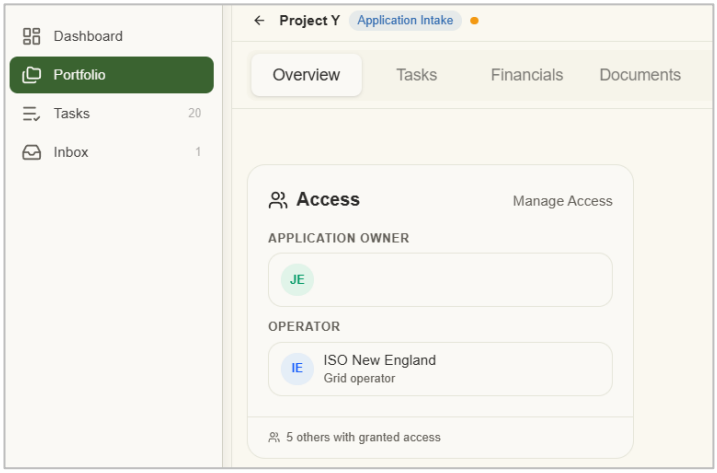
Submit the application using the account that created the project. Click the green **Submit Application** button at the bottom of the workspace.



If you receive a message that the submission failed, check the account you are using to sign the Applicant Attestation. The account used to sign the Applicant Attestation must be the account that created the project.

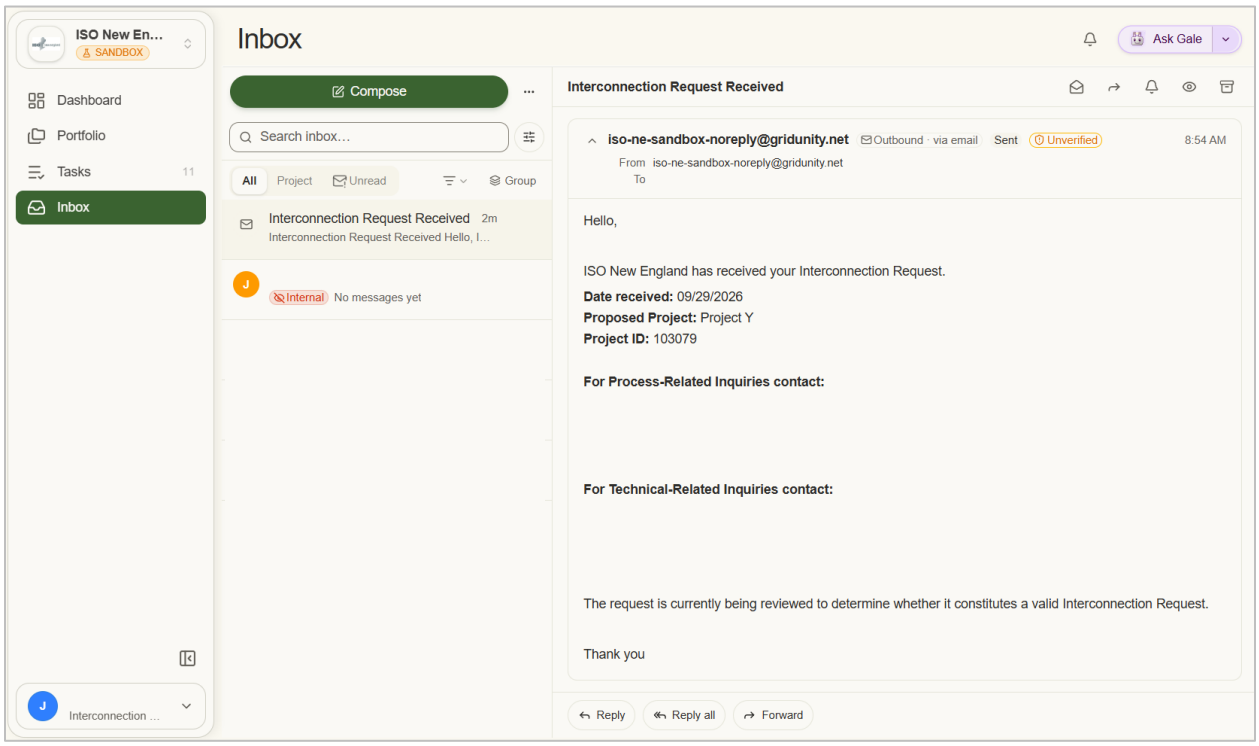


Find the name of the application owner from the project's Overview tab, in the Access card.



Confirm Receipt

After submission, navigate to your global **Inbox** (or the project's **Comms** tab) to verify receipt. You will receive an "Interconnection Request Received" message confirming that ISO New England has received your documentation and initiated the completeness review.



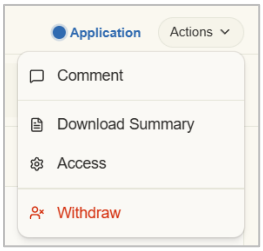
Withdraw a Project

⚠ **IMPORTANT WARNING** Withdrawing an interconnection request results in the loss of your queue position and potentially the assessment of significant financial withdrawal penalties depending on your current phase in the study process. The instructions below only outline the mechanical software steps to withdraw a project in GridUnity. You must read the applicable Interconnection Procedures in the ISO New England Open Access Transmission Tariff (OATT) or contact ISO New England to understand the financial consequences before executing these steps.

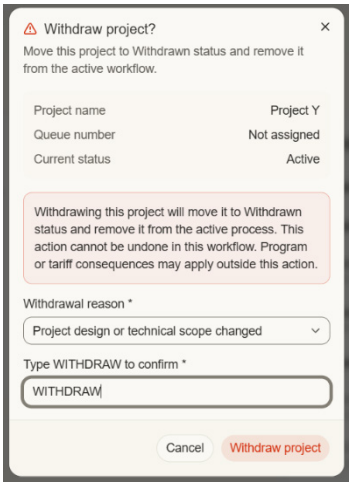
Once withdrawn, the project cannot be recovered.

Customer Actions

1. Navigate to the Portfolio and open the specific project's workspace.
2. Click the **Actions** dropdown menu in the top right corner of the header.



3. Select **Withdraw** from the menu. (Note: If you have not yet submitted the application, this option will be labeled **Cancel Project**. Canceling an unsubmitted draft permanently terminates it without recording it as a formal withdrawal.)
4. Select a Withdrawal reason from the drop-down list.
    - Duplicate or superseded by another request
    - Submitted in error
    - Site control or land rights issue
    - Permitting or external approval issue
    - Project design or technical scope changed
    - Commercial or financing issue
    - Unable to satisfy program milestone or required obligation
    - Project cancelled / no longer pursuing interconnection
    - Other (must provide details)
5. Type WITHDRAW into the warning dialog box and click the Withdraw project button to execute the withdrawal.



6. Once confirmed, the project cannot be recovered. It will remain visible in your Portfolio for your records, but its status will permanently change to "Cancelled" or "Withdrawn".

Refund Documentation

If your withdrawal qualifies for a return of any deposits (minus prudently incurred study costs and penalties), any required tasks to process your refund documentation will route to your global Inbox and the project's Tasks tab.

Application Review (Locked Operator Tasks)

The final steps in this workflow are currently undergoing final software validation. Procedural instructions for these remaining modules will be issued in a subsequent revision of this guide once system deployment is finalized.

Appendix A: Organization and Account Planning Sheet

Use this to help plan your organization, member accounts, and affiliate accounts in GridUnity. This is a guide and is optional to use. Visit the Interconnection Process Guide page if you need help.

Organization: _____

This is the name of the Interconnection Customer (IC) company that will submit the interconnection request.

Administrator Name: _____

Administrator Email: _____

This is the name and email of the person designated to be the system administrator for GridUnity.

People to Invite: Who needs access to this GridUnity organization?

- **Members:** An associate or employee of the organization
- **Affiliations:** A consultant or a consultant company of the organization

Roles on Invite: What type of access to GridUnity needs to be given?

- **Org Admin:** Read/write access. Can perform all functions in GridUnity, including inviting members and affiliates, revoking access, and assigning roles.
- **Org Member:** Can view all areas of GridUnity. Cannot change roles.

Invite Members: User Menu > My Organization > Members (invite employees)

Name	Email address	Admin or Member	Role

Invite Affiliates: User Menu > My Organization > Affiliations (invite consultants)

Name	Email address	Admin or Member	Role

Roles on Project Creation: For each project (IR) in GridUnity, who needs access?

Project Name: _____

This is the project name of the Interconnection Request (IR) that will be submitted on behalf of the IC.

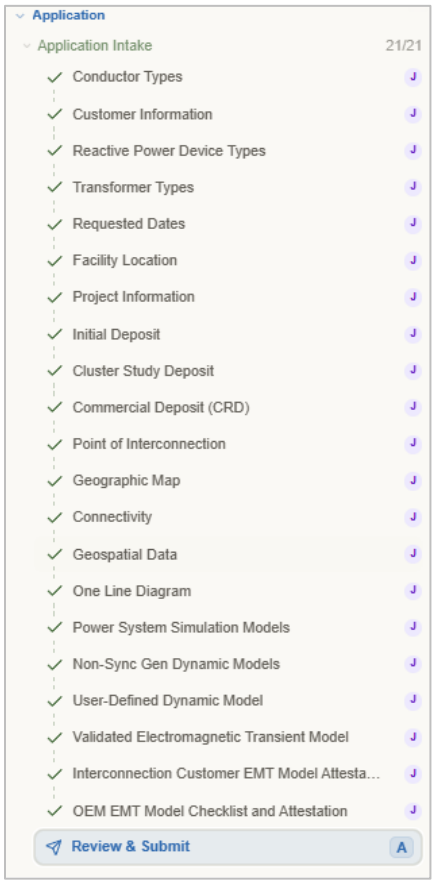
Name	Email address	Affiliate or Member	Role

Appendix B: LGIR/SGIR Application Intake Sections

Application Section	Description
100% Exclusive Site Control	Upload evidence demonstrating full, exclusive legal control over the proposed project site.
Cluster Study Deposit	Submit the cash deposit to participate in the cluster study.
Collection System/ Transformer Tap-Setting Design	Submit the design parameters for the facility's internal electrical collection system and transformer tap settings.
Connectivity	Define the specific electrical layout and connected components linking the generating facility to the grid.
Excitation System Data	Provide technical parameters for the generator's excitation system used to control field voltage.
Project Information	Establish the fundamental characteristics of your interconnection request, including the project identity, request classification, and capacity.
Reactive Power Device Types	Detail any supplemental reactive power devices, such as capacitor banks or STATCOMs, included in the facility design.
Short Circuit Model	Provide the short circuit modeling parameters needed to evaluate the facility's fault current contributions.
Site Acreage Attestation	Upload formal attestation and documentation regarding the total acreage available at the proposed site.
Commercial Readiness Deposit (CRD)	Submit the Commercial Readiness Deposit to demonstrate the project's financial maturity and commitment.
Contacts	Provide your company information, ISO customer ID, and the details for your designated contact persons.
Power System Stabilizer Data	Submit parameter data for the power system stabilizers designed to damp electromechanical oscillations.
Governor Data	Provide the operational parameters of the speed and load governing system controlling the generator's mechanical power.
Project Timeline	Define your anticipated schedule by entering the requested in-service, initial synchronization, and commercial operation dates.
Facility Location	Enter the physical street address, county, and general site details for the proposed project.
Sync Gen Dynamic Model Files	Upload the required dynamic model files representing the operational physics of synchronous generation equipment.
Resource Types	Specify the type of generating resource connecting to the grid and its total capacity at the generation terminals.

Application Section	Description
Transformer Types	Provide the technical specifications, ratings, and total count for the transformers utilized in the facility.
Conductor Types	Identify the materials, sizes, ratings, and total count of the electrical conductors planned for the project.
Bus-Breaker Based One-line Diagram	Upload a single-line electrical schematic illustrating the bus and breaker configurations of the facility.
Initial Deposit	Submit the required application funds to allow your project to proceed to the next phase.
Point of Interconnection	Identify the specific station or transmission line where the interconnection facilities will connect to the grid.
Detailed Project/Site Map	Upload a detailed visual layout of the proposed generating facility, including site boundaries, access roads, and routing.
Generator Types & Temperature Derated Curve	Define the specific generator models and provide performance curves adjusted for ambient temperature constraints.
Geospatial Data	Upload the required geographic information system (GIS) or shapefiles accurately mapping the project footprint.
Minimum Site Acreage Requirement	Demonstrate that the project meets the minimum acreage required for the proposed generation capacity.
Reactive Capability Curve	Upload the generator's reactive power capability charts showing the limits of real and reactive power output.
Generator Types & Disturbance	Describe the generator's physical behavior and ride-through capabilities during grid disturbance events.
Grid-Support Control & Coordination	Outline the control systems designed to provide active grid support and coordinate with ISO operations.
Power Flow Model — Aggregated / Equivalent	Upload the required aggregated power flow modeling data representing the equivalent facility output.
Optional EMT Simulation Case Files	Upload Electromagnetic Transient (EMT) simulation files if detailed transient analysis is necessary for your project.
Optional Dynamic Model Files	Upload optional dynamic modeling files representing the real-time operational physics of the facility.

Appendix C: ETUIR Application Intake Sections

Application Section	Description
Conductor Types	Identify the materials, sizes, ratings, and total count of the electrical conductors planned for the elective transmission upgrade.
Customer Information	Provide your company details, ISO customer ID, and the contact information for your designated representatives.
Reactive Power Device Types	Detail any supplemental reactive power devices included in the transmission facility design.
Transformer Types	Provide the technical specifications, ratings, and total count for the transformers utilized in the transmission upgrade.
Requested Dates	Define your anticipated schedule by entering the requested in-service, trial operation, and commercial operation dates for the transmission upgrade.
Facility Location	Enter the physical street address, county, and general site details for the proposed transmission project.
Project Information	Establish the fundamental characteristics of your ETU request, including the project identity, classification (Internal or External), and proposed objectives.
Initial Deposit	Submit the required application funds to allow your elective transmission upgrade project to proceed.
Cluster Study Deposit	Submit the cash deposit to participate in the cluster study.
Commercial Readiness Deposit (CRD)	Submit the Commercial Readiness Deposit to demonstrate the transmission project's financial maturity and commitment.
Point of Interconnection	Identify the specific location where the elective transmission upgrade will connect to the grid.
Geographic Map	Upload a geographic map clearly illustrating the location of the proposed facilities, the point of interconnection, and the transmission line routing.
Connectivity	Define the specific electrical layout and connected components linking the transmission upgrade to the grid.
Geospatial Data	Upload the required geographic information system (GIS) or shapefiles accurately mapping the transmission project footprint.
One Line Diagram	Upload a detailed single-line electrical diagram illustrating the proposed transmission upgrade facilities and existing grid connections.
Power System Simulation Models	Upload the required power flow and simulation models representing the operational characteristics of the transmission upgrade.

Application Section	Description
Non-Sync Gen Dynamic Models	Upload the required dynamic models representing any non-synchronous components of the transmission facility.
User-Defined Dynamic Model	Provide any specific, user-defined dynamic modeling files necessary to accurately represent the transmission equipment's behavior.
Validated Electromagnetic Transient Model	Upload a validated Electromagnetic Transient (EMT) model to allow for detailed transient analysis of the transmission upgrade.
Interconnection Customer EMT Model Attestation	Upload formal attestation from the interconnection customer confirming the accuracy and validity of the submitted EMT model.
OEM EMT Model Checklist and Attestation	Upload the completed checklist and formal attestation from the Original Equipment Manufacturer regarding the provided EMT model.