

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

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# 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 <u>How to:</u> 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: <u>http://www.iso-ne.com/rules\_proceds/isone\_mnls/index.html</u>:
    - 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: <u>http://www.iso-ne.com/rules\_proceds/operating/index.html</u>
  - ISO New England Planning Procedures at: http://www.iso-ne.com/rules\_proceds/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

## 2.1 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 <u>do not</u> have an A&TT role or <u>have not</u> 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 <u>AskISO@iso-ne.com</u>.

#### 2.1.3 <u>A&TT Access Roles</u>

- 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	Х	Х	Х
Capacity Resources	Х	Х	Х
Demand Response Resources	Х	Х	Х
Assets	Х	Х	Х
Audit Requests Update & Cancel	Х		
Audit Requests View	Х	Х	Х

# • 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: <u>https://smd.iso-ne.com/</u>

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 "DR Audit and Testing Tool" homepage displays:

Audit and	d Testing Tool				
Dashboard	Capacity Resources	Demand Response Resources	Assets	Audit Requests	

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 <u>AskISO@iso-ne.com</u>.
- 2. Your SA will assign you at least one specific role in A&TT. See the "A&TT Roles" <u>section 6</u> 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 "<u>Accessing A&TT</u>" 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 <u>A&TT user interface</u>



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

- o 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:
  - o Lead Participant Maintainer
  - o Lead Participant Read Only
  - o Demand Designated Entity Read Only
- 1. Launch the A&TT interface. See the "<u>Accessing A&TT</u>" section.
- 2. The "Dashboard" screen displays:

Audit a	nd Test	ing Toc	d						Testi ATT Test C	ng Customer (128728) ustomer 1 Test User 1
Dashboard	Capaci	ty Resources	Deman	d Response Resources	Assets	Audit Requests				
Pending /	Audits									
Request	Window Start	Uindow End	LI Audit Type	Capacity Resource Name (ID)	Demand Response Resource Name (ID)	Capacity Resource Type	t it Audit Source	Audit Status	Market Participant Name (ID)	Actual Audit Date
89191	03/19/20 <mark>1</mark> 8	03/26/2018	Claim 10/Claim 30		ZSEMA013 (60818)		CUSTOMER	PENDING	Testing Customer (128728)	
« د 1	> >>				A CSV Exp	port			E	Displaying 1 to 1 of 1

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 DDR ID hyperlink for details.

	Capacity Re	sources	Demand Response Resou	rces	Assets	Audit Request	s			
- Contractor										
Deman	a Kesp	onse Res	source Search							
As Of Da	ite* De	emand Respon	se Resource Name (ID)		Demand Response	Resource Stat	us	Load Zone Name	Market Pa	rticipant Name (ID)
03/15/20	018 a	utocomplete			OPERATIONAL		~		✓ autocomp	olete
Dispatch	Zone Name	e	Aggregation Zone Name		Reserve Zone Nam	P	Designated Entit	y Name (ID)		
Western	n MA	~								Consumption of the second s
-		•	1	v		v	autocomplete			Search
Requ	uest Audit(s) IR ID E	DRR Name	Last Winter Audit	Las	t Summer Audit	Market P	autocomplete	D) Load Zone Name (I	D)	Search Aggregation Zone Name (ID)
Requ DR	vest Audit(s) IR ID E 340 Z	DRR Name	Last Winter Audit 03/01/2018	Last	t Summer Audit 0/2018	Market P Testing C	autocomplete articipant Name (II ustomer (128728)	0) Load Zone Name (I West/Central Mass	D) WCMA) (4007)	Aggregation Zone Name (ID) DR.MA_Western (7618)
Requ DR 608	rest Audit(s) IR ID E 340 Z 359 Z	DRR Name ZWMA029 ZWMA03C	Last Winter Audit 03/01/2018 02/20/2018	Lasi 04/2 04/2	t Summer Audit 0/2018 0/2018	Market P Testing C Testing C	articipant Name (II ustomer (128728) ustomer (128728)	D) Load Zone Name (I West/Central Mass West/Central Mass	D) WGMA) (4007) WCMA) (4007)	Aggregation Zone Name (ID) DR.MA_Western (7618) DR.MA_Western (7618)

4. "Demand Response Resource Details" screen displays:

As Of	Demand Resp	onse	Resource Name (ID)		Capacity Resource Na	me (ID)			Aggregation Zone Name (II	D)
03/15/2018	ZWMAD3C (	0859)			Demand Capacity Res	ource 2170	(37944)	DR.MA_Western (7618)		
Current Summ	mer Audit Value Current Winter Audit Value		Summer Effective Date		Winter Effective Date	e				
0.333	(		D.150	0	01/01/2018	0	02/21/2018	0		
	.333 0 0.150 0		01/01/2018 02/21/2018							
Market Partici	Participant Name (ID)		Designated Entity Nam	ie (ID)						
Market Partici	pant Name (ID) omer (128728)				Designated Entity Nam Testing Customer (128	ne (ID) 1728)				
Market Partici, Testing Custo apability Histor Effective	pant Name (ID) omer (128728) Ty Mapped Ass Ik Season	ets	IT Value MW	11	Designated Entity Nam Testing Customer (128 Audit Request ID	ne (ID) 8728)	🔐 Audit Date	Expires	∐ Status	11
Market Partici Testing Custo apability Histor Effective 01/01/2018	pant Name (ID) omer (128728) Ty Mapped Ast J& Season SUMME	ets R	111 Value MW 0.333	11	Designated Entity Nam Testing Customer (128 Audit Request ID 88094	ne (ID) 8728)	Audit Date 04/20/2018	LT Expires	IF Status COMPLETE	11

As Of	Demar	nd Resp	onse Resource Na	me (ID)	Capacity Resource	Name (II	D)		Aggregation Zone Name (ID)	
03/20/2018	ZWM	A03C (6	D859)		Demand Capacity	Resource	2170 (37944)		DR.MA_Western (7618)	
Current Summer Audit		lit	Current Winter Audit Value		Summer Effective Date		Winter Effective Date		link to ADCR details	
Value			0.150	0	01/01/2018	0	02/21/2018	0		
0.333		0								
0.333										
Market Partic	ipant Na	ame (ID)			Designated Entity	Name (ID	)			
Market Partic	tomer (12	<b>ame (ID)</b> 28728)			Designated Entity	Name (ID (128728)	)			
Market Partic Testing Cust Capability Histo Effective	tomer (12 ory N	ame (ID) 28728) Aapped / Geason	Assets Value MW	11	Designated Entity I Testing Customer	Name (ID (128728)	) Audit Date	Expires	11 Status	11
Market Partic Testing Cust capability Histo Effective 01/01/2018	tomer (12 ory N JE S	ame (ID) 28728) Aapped / Geason SUMMEF	Assets I Value MW 0.333	11	Designated Entity I Testing Customer	Name (ID (128728)	) Audit Date 04/20/2018	11 Expires	IT Status COMPLETE	11

As Of	Demand Re	sponse Resource	Name (ID)	Capacity Resource	ce Name (I	D)			Aggregation Zone Name (II	1)
03/20/2018	ZWMA03C	(60859)		Demand Capacit	ty Resource	2170 (37944)			DR.MA_Western (7618)	
Current Sum	mer Audit	Current Winter	Audit Value	Summer Effective	e Date	Winter Effective D	ite			
Value		0.150	0	01/01/2018	0	02/21/2018	0			
0.333	0									
Market Partic	ipant Name (I	D)		Designated Entity	y Name (ID	)				
Testing Cust	tomer (128728	1								
Capability Histo	ory Mappe	d Assets		Testing Custome	er (128728)					
Capability Histo	ory Mappe	d Assets	↓≞ Name	Testing Custome	r (128728)		IT M	1		It
Capability Histo ID 60241	Mappe	d Assets	Ji Name The Daile	resting Custome	r (128728)		Jî Mi	200		11
ID 60241 60409	Dry Mappe	d Assets	J≞ Name The Daile Bailey Sa	Pesting Custome ey Planet wings and Loan	r (128728)		ut Mi 0.2 0.4	; 00 00		11
D 60241 60409 60424	ory Mappe	1 Assets	Li Name The Daile Bailey Sa My Cousi	ey Planet wings and Loan in Vinnie's Pizzaria	r (128728)		III 11 5.0 1.0 0.0	C 00 00 75		H
D 60241 60424 60425	Mappe	d Assets	Li Name The Daile Bailey Sa My Cous Animal H	ey Planet wings and Loan in Vinnie's Pizzaria ouse	r (128728)		11 Mi 1.0 1.0 1.0 1.0	C 00 00 75 75		11
D 60241 60424 60425 60435	Mappe	d Assets	I Name The Daile Bailey Sa My Cous Animal H Little Sho	ry Planet wings and Loan in Vinnie's Pizzaria ouse up of Horrors	er (128728)		MI 11 0.0 0.0 0.0 0.0	5 00 00 75 75 75		11
D 60241 60409 60424 60425 60435 60436	Mappe	d Assets	Image         Name           The Daile         Bailey Sz           Bailey Sz         My Cous           Animal H         Little Shot           The Firm         Firm	ey Planet wings and Loan in Vinnie's Pizzaria ouse p of Horrors	er (128728)		11 11 12 13 0 14 0 14 0 14 0 14 0 14 0 14 0 14 0 14	2 00 00 75 75 75 75		11

#### 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 "<u>Accessing A&TT</u>" section.
- 2. The "Dashboard" screen displays.
- 3. Click on the "Demand Response Resources" tab.
- 4. The "Demand Response Resource Search" screen displays:

dit ar	nd Test	ing Too	bl					
Dashboard	Capa	rity Resources	Demand Response R	esources	Assets	Audit Req	jesls	
D	emand F	Response	e Resource Search	1				
	As Of Date*	Demand Res	ponse Resource Name (ID)	Demand Re	sponse Resour	ce Status	Load Zone Name	Market Participant Name (ID)
	03/27/2018	autocomplet	ie -	OPERATIO	DNAL	~		autocomplete
	Dispatch Zon	e Name	Aggregation Zone Name	Reserve Zo	ne Name	Designated I	Entity Name (ID)	
		~	~		~	autocomple	le	Q Search

- 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:

As Of Dat	e* Demand Respon	nse Resource Name (ID)	Demand Response Res	ource State	us	Load Zone Name	Market Participant Name (ID)
03/15/20	18 autocomplete		OPERATIONAL		~	~	autocomplete
Dispatch	Zone Name	Aggregation Zone Name	Reserve Zone Name		Designated Entity	y Name (ID)	
	~	~		~	autocomplete		Q Se
E Reque	ast Audit(s) R ID DRR Name	👔 Last Winter Audit 🕄 👖 La	st Summer Audit 0	Market Pa	articipant Name (ID	)) 👔 Load Zone Name (ID)	Aggregation Zone Name (ID)
611	36 ZCTMADAD			Testing C	ustomer (128728)	West/Central Mass (WCI	MA) (4007)
608	45 ZECT02E	01/20/2018 04/	20/2018	Testing C	ustomer (128728)	CT (4004)	DR.CT_Eastern (7600)
608	D2 ZLSMA003	02/27/2018 04/	20/2018	Testing C	ustomer (128728)	SEMA (4006)	DR.MA_Lower_SEMA (7612)
608	50 ZME03D	01/20/2018 04/	20/2018	Testing C	ustomer (128728)	ME (4001)	DR.ME_Maine (7606)
608	73 ZME04A	01/20/2018 04/	20/2018	Testing C	ustomer (128728)	ME (4001)	
✓ 608	47 ZNEWH030	01/20/2018 04/	20/2018	Testing C	ustomer (128728)	NH (4002)	DR.NH_New_Hampshire (7610)
608	77 ZNSHR04E	01/20/2018 04/	20/2018	Testing C	ustomer (128728)	NEMA (4008)	
608	79 ZNWVT050	02/02/2018 04/	20/2018	Testing C	ustomer (128728)	VT (4003)	
611	30 ZRI088			Testing C	ustomer (128728)	RI (4005)	DR.RI_Rhode_Island (7619)
608	18 ZSEMA013	01/20/2018 04	20/2018	Testing C	ustomer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
609	30 ZSEMA05D			Testing C	ustomer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
610	59 ZSEMA088	03/14/2018		Testing C	ustomer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
611	33 ZSEMA089			Testing C	ustomer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
	78 ZSEMADBE			Testing C	ustomer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
611				Testing C	ustomer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
611	27 ZSEMADCA					SEMA (4006)	DR.MA_SEMA (7613)
611 612 612	27 ZSEMADCA 39 ZSEMADCE			Testing C	ustomer (128728)		
611 612 612 612	27         ZSEMADCA           39         ZSEMADCE           43         ZSEMADDD			Testing C Testing C	ustomer (128728) ustomer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
6111 612: 612: 612: 612: 611:	27         ZSEMA0CA           39         ZSEMA0CE           43         ZSEMA0D0           33         ZSFLD0AB			Testing C Testing C Testing C	ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4006) West/Central Mass (WCI	DR.MA_SEMA (7813) MA) (4007) DR.MA Springfield (7817)
6111 612: 612: 612: 612: 611: 608:	27         ZSEMA0CA           39         ZSEMA0CE           43         ZSEMA0D0           33         ZSFLD0AB           56         ZVT039	01/20/2018 04/	20/2018	Testing C Testing C Testing C Testing C	ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4006) West/Central Mass (WCI VT (4003)	DR.MA_SEMA (7613) MA) (4007) DR.MA_Springfield (7617) DR.VT Vermont (7615)

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 T	esting Tool							Testing Custome T Test Customer 1 T	r (128728 est User 1
Dashboard	Capacity Resources	Demand Response Re	esources Assets	Audit R	equests				
Create I	Demand Respo	nse Resource (I	DRR) Audit Requ	est					
Audit Typ	e* Post	Dispatch Audit* A	03/19/2018	Dispatch Ev	ent Start*	min			
Resourc	es								
Name (ID	) Current Su	mmer Audit Value (MW)	Earliest Summer Audit E	xpiration	Current Winter Audit V	alue (MW)	Earliest Winter Audit	t Expiration	
ZNEWHO	30 (60847) 1.732		01/01/2018		1.309		01/01/2018		
Comment									
optional								< >	
Create A	udit Request						< E	Back to Search	

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

Seasonal	~	Post Dispatch Audit*	Au	Jdit Window Start*	Dispatch Even	nt Start*	min		
Seasonai		NO	•	13/10/2010	Hour	•   •   •			
lesources			_						
Name (ID)	Curren	nt Summer Audit Value (MW)		Earliest Summer Audit Expire	ation	Current Winter Audit Value (	MW)	Earliest Winter Audi	t Expiration
ZNEWH030 (60847)	1.732			01/01/2018		1.309		01/01/2018	
Comment									
1									
									0
1									v

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

O Succe	ssfully add	ed 1 Demand Respons	se Resource Audit Rec	quests		
As Of Date*	Demand Respo	nse Resource Name (ID)	Demand Response Resource Stat	us	Load Zone Name	Market Participant Name (ID)
03/15/2018	autocomplete		OPERATIONAL	~		autocomplete
Dispatch Zone	Name	Aggregation Zone Name	Reserve Zone Name	Designated Enti	ty Name (ID)	
	~	~	~	autocomolete		Q Search

14. Select "Dashboard" tab to display pending audit requests.

Audit an	d Testing Tool				Testing Customer (128728) ATT Test Customer 1 Test User 1
Dashboard	Capacity Resources	Demand Response Resources Ass	ets Audit Requests		
Pending A	udits				
Request≞ ID	Window II Window Start End	II Audit II Capacity Resource Name II Type (ID)	Demand Response Resource III Capacity Name (ID) Type	Resource II Audit II Audit Source Status	II Market Participant Name II Actual Audit II (ID) Date
89188	03/16/2018 03/23/2018	Seasonal	ZNEWH030 (60847)	CUSTOMER PENDING	Testing Customer (128728)
« < 1	> >>		Z CSV Export		Displaying 1 to 1 of 1

#### 15. Click "Request ID" link to display "Audit Request Details" screen.

89188       ATT Test Customer 1. Test User 1 (000000001)       Seasonal         Vadit Status       Audit Source       Post Dispatch Audit         PENDING       CUSTOMER       No         Resource Type       CSD MW         CSD MW       Net CSD MW         Resource Type       CSD MW       Net CSD MW       Demand Response Resource Name (ID)       Audit Results       Load Zone Name (ID)         Audit Modox 060847)       NH (4002)         Testing Customer (128728)         Testing Customer (128728) <td< th=""><th>Request ID</th><th>Requestor Nan</th><th>ne (ID)</th><th></th><th>Audit Type</th><th>Comment</th><th></th><th></th><th></th><th></th><th></th></td<>	Request ID	Requestor Nan	ne (ID)		Audit Type	Comment						
Audit Status Audit Status   PENDING CUSTOMER   CUSTOMER No	89188	ATT Test Cust	tomer 1, Test User 1	(999999691)	Seasonal							
PERIDING         CUISTORER         No           Construction         Constructio	Audit Status		Audit Source	Post Dispatch	Audit						Ũ	
Resource Same (ID)         Audit Results         Load Zone Name (ID)           Sapacity Resource Name (ID)         Audit Results         Load Zone Name (ID)         NH (4002)           sapacity Resource Name (ID)         ZNEWH030 (00947)         Testing Customer (128728)         NH (4002)           sapacity Resource Name (ID)         Testing Customer (128728)         Testing Customer (128728)         Testing Customer (128728)           regregation Zone Name (ID)         Testing Customer (128728)         Testing Customer (128728)         Testing Customer (128728)           sapacity Resource Name (ID)         Same (ID)         Testing Customer (128728)         Testing Customer (128728)           same (ID)         Same (ID)         Same (ID)         Testing Customer (128728)         Testing Customer (128728)           same (ID)         Same (ID)         Same (ID)         Testing Customer (128728)         Testing Customer (128728)           same (ID)         Same (ID)         Same (ID)         Testing Customer (128728)         Testing Customer (128728)           same (ID)         Same (ID)         Same (ID)         Testing Customer (I28728)         Testing Customer (I28728)           same (ID)         Same (ID)         Same (ID)         Same (ID)         Same (ID)         Same (ID)           Same (ID)         Same (ID)	PENDING		CUSTOMER	No								
<th colseci<="" td=""><td>Resource</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th>	<td>Resource</td> <td></td>	Resource										
Andit Window Start     Audit Window End     Actual Audit Start     Actual Audit End     Earliest Audit Expiration	Capacity Reso	urce Type	C SO MW	Net CSO MW	Demand Response Resp	urce Name (ID)	Audit Results		Load Zone Nam	ne (ID)		
Agarety Resource Name (ID)     Market Participant Name (ID)     Designated Entity Name (ID)       Image: Space			1		ZNEWH030 (60847)				NH (4002)			
Audit Window Start Audit Window End Actual Audit Start Actual Audit End Earliest Audit Expiration 03/15/2018 13:59 03/16/2018 03/23/2 03/23/2 03/23/2 03/23/2 03/23/2 03/23/2 03/23/2 03/23/2 03/2 0	Capacity Reso	urce Name (ID)						Designated Ent	tu Nama (ID)			
lessing Costellie (LE/L2) lessing Costellie	Capacity Read				DO 10 F 10 F 10	Marticipant Name (III)						
Submitted         Audit Window Start         Audit Window End         Actual Audit Start         Actual Audit End         Earliest Audit Expiration           03/15/2018 13:59         03/16/2018         03/23/2018	Aggregation Z	one Name (ID) Hampshire (7610)			Testi	rg Customer (128728)		Testing Custom	ter (128728)			
03/15/2018 13:59 03/16/2018 03/23/2018	Aggregation Z DR.NH_New_ Dates	one Name (ID) Hampshire (7610)			Testi	Participant Name (ID)		Testing Custom	er (128728)			
	Aggregation Z DR.NH_New_ Dates Submitted	one Name (ID) Hampshire (7610)	Audit Window	Start	Audit Window End	Participant Name (ID) ng Customer (128728) Actual Audi	t Start	Testing Custom	d	Earliest Audit Expire	ation	
	Aggregation Z DR.NH_New_ Dates Submitted 03/15/2018 12	one Name (ID) Hampshire (7610)	Audit Window : 03/16/2018	Start	Audit Window End	Actual Aud	t Start	Actual Audit En	d	Earliest Audit Expire	ation	
🖹 Cancel this Audi	Aggregation Z DR.NH_New_ Dates Submitted 03/15/2018 13	one Name (ID) Hampshire (7610) :59	Audit Window 3 03/18/2018	Start	Audit Window End	Actual Aud	t Start	Actual Audit En	d	Earliest Audit Expire	ation neel this Audit	
2 Carrol Pils Audit	Aggregation Z DR.NH_New_ Dates Submitted 03/15/2018 13	ne Name (ID) Hampshire (7610)	Audit Window 3 03/18/2018	Start	Audit Window End	Actual Aud	t Start	Actual Audit En	d	Earliest Audit Expire	ation neel this Audit	
edit Results Status History Dispatch Info	Aggregation Z DR.NH_New_ Dates Submitted 03/15/2018 13	one Name (ID) Hampshire (7610) ::59 Status History	Audit Window 1 03/16/2018 Dispatch Info	Start	Audit Window End	Actual Aud	t Start	Actual Audit En	d	Earliest Audit Expire	ation neel this Audit	
edit Results Status History Dispatch Info	Aggregation Z DR.NH_New_ Dates Submitted 03/15/2018 13 Audit Results	one Name (ID) Hampshire (7610) 1:59 Status History	Audit Window : 03/16/2018 Dispatch Info	Start	Audit Window End	Actual Aud	t Start	Actual Audit En	d	Earliest Audit Expire	ation neel this Audit	

#### 3.2.4 Submit an Audit Request – Past Dispatch

- Role this applies to:
  - Lead Participant Maintainer
- 1. Launch the A&TT interface. See the "<u>Accessing A&TT</u>" section.
- 2. The "Dashboard" screen displays.
- 3. Click on the "Demand Response Resources" tab.

As Of Date*	Demand Respo	nse Resource Name (ID)	Demand Response Resource Sta	tus	Load Zone Name	Market Participant Name (ID)
03/15/2018	autocomplete		OPERATIONAL	~	~	autocomplete
Dispatch Zo	ne Name	Aggregation Zone Name	Reserve Zone Name	Designated Entit	y Name (ID)	
	~	~	~	autocomplete		Q Search
						L
Request	Audit(c)					
E request	Audul(5)					
DRRI	DRR Name	11 Last Winter Audit 🛛 11 Las	it Summer Audit 🛛 📋 Market I	'articipant Name (IL	) Load Zone Name (ID)	Aggregation Zone Name (ID)
01130	ZCIMAUAD	04/20/2010	iesting (	Customer (128728)	OT (4004)	A) (4007)
00040	21 244002	01/20/2018 04/	20/2010 Testing (	Customer (128728)	CT (4004)	DR.CI_Eastern (7000)
00002	ZLOWADD	02/27/2010 04/	20/2010 Testing (	Customer (120720)	SEMA (4666)	DR.MA_COWE_SEMA (7012)
80972	ZMEDAA	01/20/2018 04/.	20/2018 Testing (	Customer (128728)	ME (4001)	DR.WE_Maine (7000)
60847	ZNEWH030	01/20/2018 04/	20/2018 Testing	Customer (128728)	NH (4002)	DR NH New Hampshire (7810)
60877	ZNSHRD4E	01/20/2018 04/	20/2018 Testing (	Customer (128728)	NEMA (4008)	Sich Crew_hanganie (role)
60870	ZNW/T050	02/02/2018 04/	20/2018 Testing (	Sustamer (128728)	VT (4003)	
61160	2RI088		Testing (	Sustamer (128728)	RI (4005)	DR RI Rhode Island (7619)
00818	ZSEMAD13	01/20/2018 04/	20/2018 Testing (	Customer (128728)	SEMA (4006)	DR MA SEMA (7613)
60960	ZSEMA05D		Testing (	Customer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
61059	ZSEMA088	03/14/2018	Testing	Customer (128728)	SEMA (4006)	DR.MA_SEMA (7813)
61163	ZSEMA0B9		Testing	Customer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
61178	ZSEMADBE		Testing	Customer (128728)	SEMA (4006)	DR.MA SEMA (7613)
61227	ZSEMADCA		Testing	Customer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
61239	ZSEMADCE		Testing	Customer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
61243	ZSEMADDO		Testing (	Customer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
61133	ZSFLDOAB		Testing (	Customer (128728)	West/Central Mass (WCM	A) (4007) DR.MA_Springfield (7617)
60856	ZVT039	01/20/2018 04/2	20/2018 Testing (	Customer (128728)	VT (4003)	DR.VT_Vermont (7615)

- 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 a previous dispatch).
- 10. Enter "Dispatch Event Start" hour of the previous dispatch being selected as an audit.
- 11. Enter Minute. The 1<sup>st</sup> 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.

Audit and T	esting Tool						Testing Customer (1287) ATT Test Customer 1 Test Use
Dashboard	Capacity Resources	Demand Response Resources	Assets	Audit Requests			
Create	Demand Respon	nse Resource (DRR)	Audit Reques	st			
Audit Ty Seasor Resour	nal V	Post Dispatch Audit* Yes	Audit Window Star	Hour 1	Svent Start*	min	
Name (I	D) Current Sur	mmer Audit Value (MW)	Earliest Summer	Audit Expiration	Current Winter Audit Value (I	IW) Earliest Winter Audit Expir	ation
ZME04A	A (60873) 0.460		01/01/2018		0.256	01/01/2018	
Commer	nt						
optiona	d.						$\sim$
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."

O Succe	ssfully add	ed 1 Demand Respons	se Resource Audit Red	quests		
As Of Date <sup>*</sup>	Demand Respo	nse Resource Name (ID)	Demand Response Resource Stat	us	Load Zone Name	Market Participant Name (ID)
03/15/2018	autocomplete		OPERATIONAL	~		autocomplete
Dispatch Zone	Name	Aggregation Zone Name	Reserve Zone Name	Designated Enti	ty Name (ID)	
	~	~	~	autocomplete		Q Searc

15. Select "Dashboard" tab to display pending audit request.

A	udit ar	nd Testir	ng Tool								A	Testing Customer (128728) IT Test Customer 1 Test User 1
	Dashboard	Capacity	Resources	Demand Resp	onse Resources	Assets	Audit Requests					
Pe	nding A	udits										
	Request 👫 D	Window (	Window End	It Audit It ( Type (	Capacity Resource I (ID)	Name 👔 Dema Name	nd Response Resource (ID)	计 Capacity Resourc Type	e 11 Audit Source	Audit Status	Market Participant Na (ID)	me 👔 Actual Audit 👔 Date
	89188	03/16/2018	03/23/2018	Seasonal		ZNEW	H030 (60847)		CUSTON	MER PENDING	Testing Customer (128	(728)
	<b>« &lt; 1</b>	> >>					A CSV Expo	rt.				Displaying 1 to 1 of 1

#### 3.2.5 Submit an Audit Request – Claim 10/30

- Role this applies to:
  - o Lead Participant Maintainer
- 1. Launch the A&TT interface. See the "<u>Accessing A&TT</u>" 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:

•	Сарас	city Resources	Demand Response Resourc	es	Assets	Audit Requests	e					
em	and R	esponse Re	source Search									
As O	f Date*	Demand Respon	se Resource Name (ID)		Demand Response	Resource State	15	Load Zor	ne Name	Market Par	ticipant Name (ID)	
03/1	5/2018	autocomplete			OPERATIONAL		~		~	autocomp	lete	
Disa	ateb Zone	Name	Aggregation Zone Name		Perence Zene Nam		Decimpated Entity	Name (If	21			
Disp	nen zone	Name	Aggregation Zone Maine		Reserve Zone Nam	e	Designated Endig	reame (in	2)		0.50	arab
		•		•		v	autocompiete				4.500	aich
	Request Au	idit(s)										
	DRRID	DRR Name	Last Winter Audit O	Last	Summer Audit O	Market P	rticipant Name (ID	A	Load Zone Name (ID)		Aggregation Zone Name (ID)	
	61136	ZCTMADAD		Lust	uniner riddit 🖝	Testing Ci	istomer (128728)	· .41	West/Central Mass (WCM	IA) (4007)	- Hagregation cone manie (15)	
-	60845	ZECT02E	01/20/2018	04/20	2018	Testing C	(128728)		CT (4004)		DR.CT Eastern (7600)	
	60802	ZLSMA003	02/27/2018	04/20	2018	Testing C	(128728)		SEMA (4006)		DR.MA Lower SEMA (7612)	
	60860	ZME03D	01/20/2018	04/20	2018	Testing C	stomer (128728)		ME (4001)		DR.ME Maine (7606)	
	60873	ZME04A	01/20/2018	04/20	2018	Testing Ci	istomer (128728)		ME (4001)			
	60847	ZNEWH030	01/20/2018	04/20	2018	Testing C	istomer (128728)		NH (4002)		DR.NH New Hampshire (7610)	
Π	60877	ZNSHR04E	01/20/2018	04/20	2018	Testing Ci	istomer (128728)		NEMA (4008)			
Π	60879	ZNWVT050	02/02/2018	04/20	2018	Testing Ci	istomer (128728)		VT (4003)			
	61160	ZRI0B8				Testing Ci	istomer (128728)		RI (4005)		DR.RI_Rhode_Island (7619)	
	60818	ZSEMA013	01/20/2018	04/20	2018	Testing C	istomer (128728)		SEMA (4006)		DR.MA_SEMA (7613)	
	60960	ZSEMA05D				Testing C	istomer (128728)		SEMA (4006)		DR.MA_SEMA (7613)	
	61059	ZSEMA088	03/14/2018			Testing Ci	istomer (128728)		SEMA (4006)		DR.MA_SEMA (7613)	
Ē	61163	ZSEMA0B9				Testing Ci	istomer (128728)		SEMA (4006)		DR.MA_SEMA (7613)	
	61178	ZSEMAOBE				Testing C	istomer (128728)		SEMA (4006)		DR.MA_SEMA (7613)	
-	61227	ZSEMADCA				Testing Ci	istomer (128728)		SEMA (4006)		DR.MA_SEMA (7613)	
	61239	ZSEMADCE				Testing C	istomer (128728)		SEMA (4006)		DR.MA_SEMA (7613)	
	61243	ZSEMADDO				Testing C	istomer (128728)		SEMA (4006)		DR.MA_SEMA (7613)	
	12010200	ZSFLD0AB				Testing C	istomer (128728)		West/Central Mass (WCM	A) (4007)	DR.MA_Springfield (7617)	
	61133	70,77000	01/20/2018	04/20	2018	Testing Ci	istomer (128728)		VT (4003)		DR.VT_Vermont (7615)	
	61133	211038										

- 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:

Create Demand	Response Resource (	DRR) Audit Request		
Audit Type* Claim 10/Claim 30	Post Dispatch Audit     No	Audit Window Start* ↓ 03/16/2018	Dispatch Event Start*	
Name (ID)	Current Summer Audit Value (MW)	Earliest Summer Audit Expiration	Current Winter Audit Value (MW) Earliest Winter Audit Expiration	
ZCTMADAD (61136)				
Comment				
Gallin To 20 Boart (Byor	P4			(A)

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

Succe	ssfully add	ed 1 Demand Respons	se Resource Audit Reo	quests		
As Of Date*	Demand Respo	nse Resource Name (ID)	Demand Response Resource Stat	us	Load Zone Name	Market Participant Name (ID)
03/15/2018	autocomplete		OPERATIONAL	~		► autocomplete
Dispatch Zone	Name	Aggregation Zone Name	Reserve Zone Name	Designated Enti	ity Name (ID)	
	~	~	~	autocomplete		Q 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:
  - o Lead Participant Maintainer
- 1. Launch the A&TT interface. See the "<u>Accessing A&TT</u>" 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.

d	Capacity	Resources	Demand Response Resources	Assets	Audit Requests			
Den	nand Re	sponse Re	source Search					
As	Of Date*	Demand Respor	se Resource Name (ID)	Demand Respons	e Resource Stati	is	Load Zone Name	Market Participant Name (ID)
03	8/15/2018	autocomplete		OPERATIONAL		~	×	autocomplete
Dis	natch Zone N	ame	Aggregation Zone Name	Reserve Zone Nar	me	Designated Entit	Name (ID)	
-	paron conc n	~	V		×	autocomplete	( that is a first in the first	Q Search
-	_							
E	Request Audi	t(s)						
	DRR ID	DRR Name	🕆 Last Winter Audit 🔕 🛛 👔 Las	t Summer Audit	👔 Market Pa	rticipant Name (ID	) Load Zone Name (ID)	Aggregation Zone Name (ID)
	61136	ZCTMA0AD			Testing Ci	ustomer (128728)	West/Central Mass (WC	CMA) (4007)
	60845	ZECT02E	01/20/2018 04/3	20/2018	Testing Ci	ustomer (128728)	CT (4004)	DR.CT_Eastern (7600)
	60802	ZLSMA003	02/27/2018 04/2	20/2018	Testing C	ustomer (128728)	SEMA (4006)	DR.MA_Lower_SEMA (7612)
	60860	ZME03D	01/20/2018 04/2	20/2018	Testing Ci	ustomer (128728)	ME (4001)	DR.ME_Maine (7606)
	60873	ZME04A	01/20/2018 04/2	20/2018	Testing Ci	ustomer (128728)	ME (4001)	
	60847	ZNEWH030	01/20/2018 04/3	20/2018	Testing Ci	ustomer (128728)	NH (4002)	DR.NH_New_Hampshire (7610)
	60877	ZNSHR04E	01/20/2018 04/2	20/2018	Testing Ci	ustomer (128728)	NEMA (4008)	
	60879	ZNWVT050	02/02/2018 04/2	20/2018	Testing Ci	ustomer (128728)	VT (4003)	
		ZRI0B8			Testing Ci	ustomer (128728)	RI (4005)	DR.RI_Rhode_Island (7619)
	61160							
	60818	ZSEMA013	01/20/2018 04/2	20/2018	Testing Ci	ustomer (128728)	SEMA (4006)	DR.MA_SEMA (7613)
	60818 60960	ZSEMA013 ZSEMA05D	01/20/2018 04/2	20/2018	Testing Cr Testing Cr	ustomer (128728) ustomer (128728)	SEMA (4008) SEMA (4008)	DR.MA_SEMA (7613) DR.MA_SEMA (7613)
	60818 60960 61059	ZSEMA013 ZSEMA05D ZSEMA088	01/20/2018 04/2	20/2018	Testing Ci Testing Ci Testing Ci	ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4008) SEMA (4008) SEMA (4008)	DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613)
	60818 60960 61059 61163	ZSEMA013 ZSEMA05D ZSEMA088 ZSEMA089	01/20/2018 04/2 03/14/2018	20/2018	Testing Ci Testing Ci Testing Ci Testing Ci	ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008)	DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613)
	61160 60818 60960 61059 61163 61178	ZSEMA013 ZSEMA05D ZSEMA088 ZSEMA089 ZSEMA088	01/20/2018 04/2 03/14/2018	20/2018	Testing Co Testing Co Testing Co Testing Co Testing Co	ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4006) SEMA (4006) SEMA (4006) SEMA (4006) SEMA (4006)	DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613)
	61160 60818 60960 61059 61163 61178 61227	ZSEMA013 ZSEMA05D ZSEMA088 ZSEMA089 ZSEMA086 ZSEMA086	01/20/2018 04/2	20/2018	Testing Cr Testing Cr Testing Cr Testing Cr Testing Cr Testing Cr	ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4006) SEMA (4006) SEMA (4006) SEMA (4006) SEMA (4006) SEMA (4006)	DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613)
	81160 60818 60960 61059 61163 61178 61227 61239	ZSEMA013 ZSEMA08D ZSEMA088 ZSEMA089 ZSEMA089 ZSEMA086 ZSEMA0CA ZSEMA0CE	01/20/2018 04/2 03/14/2018	20/2018	Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci	ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008)	DR. MA_SEMA (7613) DR. MA_SEMA (7613) DR. MA_SEMA (7613) DR. MA_SEMA (7613) DR. MA_SEMA (7613) DR. MA_SEMA (7613) DR. MA_SEMA (7613)
	81160 60818 60960 61059 61163 61178 61227 61239 61243	ZSEMA013 ZSEMA05D ZSEMA088 ZSEMA089 ZSEMA089 ZSEMA086 ZSEMA006 ZSEMA000	01/20/2018 04/2	20/2018	Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci	ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4009)	DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613)
	81160 60818 60960 61059 61163 61178 61227 61239 61243 61133	ZSEMA013 ZSEMA05D ZSEMA088 ZSEMA089 ZSEMA086 ZSEMA06A ZSEMA0C6 ZSEMA000 ZSFLD0AB	01/0/2018 04/2	20/2018	Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci	ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728) ustomer (128728)	SEMA (4008)	DR. MA_SEMA (7613) DR. MA_SEMA (7613) MA) (4007) DR. MA_SEMA (7617)
	81160 60818 60960 61059 61163 61178 61227 61239 61243 61133 60856	ZSEMA013 ZSEMA050 ZSEMA080 ZSEMA080 ZSEMA080 ZSEMA080 ZSEMA0CA ZSEMA0C0 ZSEMA000 ZSFLD0AB ZVT039	01/20/2018 04/2 03/14/2018 01/20/2018 04/2	20/2018	Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci Testing Ci	usbomer (128728) usbomer (128728) usbomer (128728) usbomer (128728) usbomer (128728) usbomer (128728) usbomer (128728) usbomer (128728) usbomer (128728)	SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) SEMA (4008) West/Central Mass (WC VT (4003)	DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_SEMA (7613) DR.MA_Springfield (7617) DR.M_Springfield (7617)

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

Audit a	nd Testing 1	ool								Testing Customer (128728) ATT Test Customer 1 Test User 1
Dashboard	Capacity Resou	rces	Demand Response Resources	Assets	Audit Reques	s				
С	reate Demand	Respo	nse Resource (DRR)	Audit Requ	lest					
	Audit Type*	~	Post Dispatch Audit*	Audit Window	Start*	Dispatch Eve	nt Start*	✓ min		
	Resources									
	Name (ID)	Currer	t Summer Audit Value (MW)	Earliest Su	mmer Audit Expira	ition	Current Winter Audit	Value (MW)	Earliest Winter Audit E	xpiration
	ZSEMA088 (61059)	3.290		03/07/2018			3.000		03/08/2018	
	Comment									
	optional									0
	Create Audit Request									Back to Search

- 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."

Audit ar	nd Testir	ng Tool								Testing Custor ATT Test Customer 1	ner (128728) Test User 1
Dashboard	Capacity	Resources	Demand Response Resources	Assets	Audit Requests	1					
De	emand Res	sponse Re	source Search								
	O Succes	sfully add	ed 1 Demand Respon	se Resource	e Audit Req	uests				×	
	As Of Date*	Demand Respor	se Resource Name (ID)	Demand Respon	nse Resource Statu	IS	Load Zone Name		Market Participant Name (ID)		
	03/15/2018	autocomplete		OPERATIONAL	-	~		~	autocomplete		
	Dispatch Zone Na	ame	Aggregation Zone Name	Reserve Zone Na	ame	Designated Entit	y Name (ID)				
		~	~		~	autocomplete				Q Search	

14. Select "Dashboard" tab to display pending audit request.

Audit and	d Testir	ng Tool								Tes ATT Test	ting Customer (128728) Customer 1 Test User 1
Dashboard	Capacity	Resources	Demand Respons	e Resources	Assets	Audit Requests					
Pending Au	idits										
Request ja '	Window 11 Start	Window J End	Audit Type	Capacity Res (ID)	ource Name	Demand Response Resource Name (ID)	Capacity Resource	Audit Source	Audit Ja Status	Market Participant	Actual Audit II Date
89188	03/16/2018	03/23/2018	Seasonal			ZNEWH030 (60847)		CUSTOMER	PENDING	Testing Customer (128728	
89190	03/16/2018	03/23/2018	Both Seasonal + Claim10/30	Demand Caps 2150 (37924)	city Resource	ZSEMA088 (61059)	ACTIVE	CUSTOMER	PENDING	Testing Customer (128728	
≪ < 1	> >>					Z CSV Export					Displaying 1 to 2 of 2



- 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 "<u>Accessing A&TT</u>" section on page 8.
- 2. The "Dashboard" screen displays:

Audit a	nd Test	ing Too	l						Test ATT Test (	ing Customer (128728) Customer 1 Test User 1
Dashboard	Capaci	ty Resources	Deman	d Response Resources	Assets	Audit Requests				
Pending /	Audits									
Request	Window Start	Uindow End	LI Audit Type	Capacity It Resource Name (ID)	Demand Response Resource Name (ID)	LT Capacity Resource Type	11 II Audit Source	Ji Audit Status	Market Participant Name (ID)	11 11 Actual Audit Date
89191	03/19/2018	03/26/2018	Claim 10/Claim 30		ZSEMA013 (60818)		CUSTOMER	PENDING	Testing Customer (128728)	
« < 1	> >>				CSV Ex	port			1	Displaying 1 to 1 of 1

- 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 Tes	ting To	ol							Testing Customer (1 ATT Test Customer 1 Test
Dashboard Cap	acity Resources	s De	mand Response	e Resources	Assets	Audit Rec	uests		
Audit Requ	uest Deta	ils							
Request ID	Requestor Na	me (ID)		Audit Type		Comment			
89191	ATT Test Cus (999999691)	stomer 1, Test	User 1	Claim 10/Cl	aim 30				^
Audit Status		Audit	Desired Disp MW	oatch Post	Dispatch Audit				~
PENDING		CUSTOME	5.000	No					
Resource									
Capacity Reso	ource Type	CSO MW	Net C SO	Demand Res	sponse Resourc	e Name (ID)	Audit Result	s Load Zone I	Name (ID)
			NIVV	ZSEMA013	(60818)			SEMA (400	6)
Capacity Reso	ource Name (ID	)			Designated E	ntity Name (ID)		Aggregation Zone Name	
					Testing Cust	omer (128728)		(ID)	
Datas									
Submitted		Audit Windo	w Start	Audit Windo	w End	Actual Audit 9	tart	Actual Audit End	Farliest Audit Expiration
03/16/2018 12	2:29	03/19/2018	W Sturt	03/26/2018	. Chu		un		
									Cancel this Audit
Audit Results	Status History	y Dispatch	I Info						
No audit results	s 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 Claim 10/Claim 30 (999999691)	^
Audit Status Audit Desired Dispatch Post Dispatch Audit Source MW	~
CANCELLED CUSTOME 5.000	
Resource	
Capacity Resource Type CSO MW Net CSO Demand Response Resource Name (ID) Audit Results Load Zone Name (ID)	
MW         ZSEMA013 (60818)         SEMA (4006)	
Capacity Resource Name (ID) Designated Entity Name (ID) Aggregation Zone Name	
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.	

## 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:
  - o Lead Participant Maintainer
  - o Lead Participant Read Only
  - Demand Designated Entity Read Only
- 1. Launch the A&TT interface. See the "<u>Accessing A&TT</u>" section on page 8.
- 2. The "Dashboard" displays.
- 3. Click on the "Audit Requests" tab.
- 4. The "Audit Request Search" screen displays:

ashboard	Capacity Resources	Demand Response Resources	Assets Audi	t Requests			
udit Red	quest Search						
Resource	Characteristics		Audit Reque	st Characteristics	Dates		
Capacity Re	source Name (ID)	Market Participant Name (ID)	Request ID	Requester Name (ID)	Submitted		
autocomple	te	autocomplete		autocomplete	From	To	
Demand Re	sponse Resource Name (ID)	Designated Entity Name (ID)	Audit Type	Post Dispatch Audit	Actual Audit D	ate	
autocomple	te .	autocomplete	All	V Al V	From	To	
Capacity Re	source Type	Aggregation Zone	Audit Status		Audit Window	Start	
On Peak		DR ME Maine	CANCELLED		From	To	
On Peak Seasonal Peak Active		DR.MA_SEMA DR.VT_Vermont	COMPLETE DISPATCH	NDED	Audit Window	End	
Load Zone		DR.CT_Western_SWCT DR.MA_Boston	EXPIRED	ECEIVED	From	То	
RI NEMA West/Cent ME SEMA CT VT VT NH	al Mass (WCMA)	DR MA_Springfield DR MA_Western DR CT_Norwalk-Stamford DR CT_Norwalk-Stamford DR CT_Norwalk-Stamford DR CT_Extern DR ME_Barger Hydro DR ME_Portland DR MCT_Eastern DR ME_Portland DR MCT_Northwest_Vermont DR CT_Northwest_Vermont	INITIAL REVI INITIAL REVI PARTIALLY ( PENDING SCHEDULED WAITING_FO	EW_COMPLETE EW_IN PROGRESS COMPLETED R_DISPATCH_DATA			
Request ID	Window <sup>11</sup> Window <sup>11</sup> Start End	II Cepecity II Resource Name II Audit Type (ID) R	emand Response esource Name (ID)	T Cepacity Resource Audit Type Source Audit Stat	- 11 US	Market I Participant Name (ID)	Q Search
89171	03/05/2018 03/12/2018	Seasonal Z	ME04A (60873)	CUSTOMER WAITING	FOR_DISPATCH_DATA	Testing Customer (128728)	03/05/2018
						(120120)	

#### **IMPORTANT**

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

5. Based on the Request ID selected on the "Audit Request Search" screen, the "Audit Request Details" screen displays:

quest ID Req	equestor Name	(ID)		Audit Type	Comment				
69171 AT	ATT Test Custon	mer 1, Test User 1	(999999691)	Seasonal					
udit Status		Audit Source	Post Dispatch	Audit					
WAITING_FOR_DISP	SPATCH_DA1	CUSTOMER	Yes						
lesource									
apacity Resource Ty	Туре	CSO MW	Net CSO MW	Demand Resp	ponse Resource Name (ID)	Audit Result	s	Load Zone Nam	ne (ID)
				ZME04A (60	873)			ME (4001)	
apacity Resource Na	Name (ID)				Market Participant Name (ID)		Designated Enti	ty Name (ID)	
					Testing Customer (128728)		Testing Custom	ter (128728)	
Jales		Audit Window S	Start	Audit Windov	v End Actual Aud	it Start	Actual Audit En	d	Earliest Audit Expiration
Dates ubmitted 03/08/2018 15:10		Audit Window 5 03/05/2018	Start	Audit Windov 03/12/2018	v End Actual Auc 03/05/201	it Start 8 11:15	Actual Audit En 03/05/2018 12:1	d 15	Earliest Audit Expiration

#### 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 "<u>Accessing A&TT</u>" section on page 8.
- 2. The "Dashboard" displays.
- 3. Click on "Capacity Resources" tab.
- 4. The "Capacity Resources Search" screen displays:

shboard	Capacity Resources	Demand Response Resources	Assets Au	dit Requests	
Capacity	Resource Search				
As Of Date*	Capacity Resource Type	Load Zone Name (ID)	Dispatch Zone Name (ID)	Aggregation Zone Name	Reserve Zone Name (ID)
03/23/2018				(ID)	2
Capacity Re	source Name (ID)	Capacity Resource Status	Designated Entity Name (IC		
autocomple	ito	ACTIVE .	autocomplete		

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

Capacity Resource	Capacity Resource	Market Participant Name    (ID)	Capacity Resource	Load Zone Name (ID)	Aggregation Zone Name
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)

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

and Test	ing Tool					ATT Test Custom
d Capaci	ity Resources Demand F	Response Resources	Assets Audit Re	quests		
Capacity R	esource Details					
Resource In	formation					
As Of	Capacity Resource Name (ID	)		Capacity Resource Type	Net CSO MW	
03/15/2018	Demand Capacity Resource	s 51 (9108)		ON_PEAK	0.011	
Load Zone Nar	me (ID)	Aggregation 2	one Name (ID)	Dispatch Zone Name (ID)	Reserve Zone	Name (ID)
VT (4003)					ROS (7000)	
Companies						
Market Particip	oant Name (ID)	Designated E	ntity Name (ID)			
Testing Custor	mer (128728)					
Capability Histor	y Mapped Demand Assets					
Effective	J# Season	IT Value	👔 Audit Request ID	🕼 Audit Date	11 Expires	11 Status 11
08/01/2017	SUMMER	0.069	6937	08/25/2017		COMPLETE
01/01/2017	WINTER	0.146	6582	01/19/2017		COMPLETE
« < 1	> >>			Z 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.

As Of	Capacity Resource Name (II	D)	Capacity Resource Type	Net CSO MW	
03/15/2018	Demand Capacity Resource	51 (9108)	ON_PEAK	0.011	
Load Zone Nar	me (ID)	Aggregation Zone Name (ID)	Dispatch Zone Name (ID)		Reserve Zone Name (ID)
VT (4003)					ROS (7000)
Testing Custo	pant Name (ID) mer (128728)	Designated Entity Name (ID)			
Market Particip	pant Name (ID) mer (128728)	Designated Entity Name (ID)			
Market Particip Testing Custo	pant Name (ID) mer (128728) y Mapped Demand Assets	Designated Entity Name (ID)			
ID	pant Name (ID) mer (128728) y Mapped Demand Assets	Designated Entity Name (ID)		міс	

11. 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 "<u>Accessing A&TT</u>" section on page 8.
  - 2. The "Dashboard" displays.
  - 3. Click on "Capacity Resources" tab.
  - 4. The "Capacity Resources Search" screen displays:

Audit and	d Testing Tool									Testing Custo ATT Test Customer	ner (128728) I Test User 1
Dashboard	Capacity Resources	Demand Respo	nse Resources	Assets	Audit Requests						
Cap	pacity Resource Sea	arch									
As 0	s Of Date* Capacity Resou	rce Type	Load Zone Name	(ID)	Dispatch Zone Name (ID)	Aggregation Zo	ne Name (ID)	Reserve Zone Name (ID)	~		
Ca	apacity Resource Name (ID)		Capacity Resour	ce Status	Designated Entity Name (ID)		Market Participa	ant Name (ID)			
					]					Q Search	

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

As O	f Date*	Capacity Res	ource Type	Load Zone N	lame (ID)	Dispatch Zon	ne Name (ID)	Aggregatio	on Zone Name	Reserve Z	one Name (ID)	
03/2	27/2018	Seasonal Pe	eak (SEAS 🗸		~		~	(ID)			~	1
Capa	city Reso	ource Name (II	D)	Capacity Re:	source Status	Designated E	Entity Name (ID	)	•			
auto	complete			ACTIVE	~	autocomplet	e					
R	RequestA	udit(s)										
E R	Request A Capacity ID	udit(s) Resource []	Capacity Res Name	ource []	Market Partici (ID)	ipant Name 🔐	Capacity Res Type	ource []	Load Zone Nam	e (ID)	Aggregation 2 (ID)	Zone Name 11
	Request A Capacity ID 12806	udit(s) Resource	Capacity Res Name Demand Capa 1348	ource	Market Partici (ID) Testing Custor	ipant Name 🔐 ner (128728)	Capacity Res Type SEASONAL_F	ource [] PEAK	Load Zone Nam West/Central Ma (4007)	e (ID) ss (WCMA)	Aggregation 2 (ID)	Zone Name 👔
	Request A Capacity ID 12806 16547	udit(s) Resource []	Capacity Res Name Demand Capa 1348 Demand Capa 1696	ource	Market Partici (ID) Testing Custor Testing Custor	pant Name 11 ner (128728) ner (128728)	Capacity Res Type SEASONAL_F SEASONAL_F	ource [] PEAK PEAK	Load Zone Nam West/Central Ma (4007) CT (4004)	e (ID) ss (WCMA)	Aggregation 2 (ID)	Sone Name
	Request A Capacity ID 12806 16547 9103	udit(s) Resource []	Capacity Res Name Demand Capa 1348 Demand Capa 1696 Demand Capa	ource 11 acity Resource acity Resource	Market Partici (ID) Testing Custor Testing Custor	pant Name ner (128728) ner (128728) ner (128728)	Capacity Res Type SEASONAL_F SEASONAL_F SEASONAL_F	DEAK	Load Zone Nam West/Central Ma (4007) CT (4004) CT (4004)	e (ID) ss (WCMA)	Aggregation 2 (ID)	Zone Name

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

Audit Window Start*	Actual Audit Month*				
03/28/2018	3/31/2018 🗸				
Resources	3/31/2018 4/30/2018				
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 Resourc (16547)	e 1696		4.000	4.000	4.000
Demand Capacity Resourc (12808) Comment	e 1348		37.885	45.385	37.885
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.

Request ID	Requestor Name	e (ID)		Audit Typ	pe	Comment					
89239	ATT Test Custor	mer 1, Test User 1 (	999999691)	Season	al						
Audit Status		Audit Source	Post Dispatch A	udit	Season						
SCHEDULED		CUSTOMER	No		Summer						
Resource											
Resource Type		C SO MW	Net CSO MW	Demand	Response Resource Nam	e (ID)	Audit Results		Load Zone Name	: (ID)	
SEASONAL_P	EAK	3.639	3.369						CT (4004)		
Capacity Resou	rce Name (ID)				Designated Enti	ty Name (ID)		Aggregation Zon	e Name (ID)		
Demand Capac	tity Resource 1696	(16547)									
Dates											
Submitted		Audit Window St	tart	Audit Wi	ndow End	Actual Audit Sta	rt	Actual Audit End		Actual Audit Month	
03/27/2018 14:	22	04/03/2018		05/15/20	018	03/31/2018 00:0	0	03/31/2018 00:0	0	03/31/2018	

## 4.2.4 <u>Display and Search On-Peak and Seasonal Peak Demand Resource</u> 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 "<u>Accessing A&TT</u>" section on page 8.
- 2. The "Dashboard" displays.
- 3. Click on "Audit Requests" tab.
- 4. The "Audit Request Search" screen displays:

Capacity Request Search       Audit Request Characteristics       Dates         Capacity Resource Name (ID)       Market Participant Name (ID)       Request ID       Request ID       Request ID       Submitted         Capacity Resource Name (ID)       Designated Entity Name (ID)       Audit Type       Audit Type       Post Dispatch Audit       Actual Audit Date         Capacity Resource Type       Augregation Zone       Audit Status       Audit Window Sant       From       To         Capacity Resource Type       Aggregation Zone       Audit Status       Audit Window Sant       From       To         Capacity Resource Type       DR MA Status       DR MA Status       Audit Window Sant       From       To         Capacity Resource Type       DR MA Status       DR MA Status       Capacity Resource Type       Audit Window Sant       From       To         DR MA Status       DR MA Status       DR MA Status       DR MA Status       Capacity Resource Type       Audit Window End       Explace       From       To         VestAcheral Mass (WCMA)       DR MA Status       DR MA Status       DR MA Status       Resource Name (D)	Request Search         Resource Characteristics       Dates         Capacity Resource Name (ID)       Market Participant Name (ID)       Request ID	board Capacity Resources	Demand Response Resources	ssets Audi	Requests				
Resource Characteristics     Dates       Capacity Resource Name (ID)     Market Participant Name (ID)     Request ID     Request Name (ID)     Submitted       Capacity Resource Name (ID)     Designated Entity Name (ID)     Audit Type     Post Dispatch Audit     Audit Complete       Capacity Resource Type     Aggregation Zone     Audit Status     Audit Mindow Start       Capacity Resource Type     Aggregation Zone     Audit Status     Audit Window Start       Con Peak Seasonal Peak Active     DR.M. Stans     DR.M. Stans     Prom     To       Con Peak Seasonal Peak Active     DR.M. Stans     DR.M. Stans     Prom     To       DR.M. Sendon Status     DR.M. Stans     DR.M. Stans     Prom     To       DR.M. Sendon Status     DR.M. Sendon Status     DR.M. Sendon Status     Prom     To       DR.M. Sendon Status     DR.M. Sendon Status     DR.M. Sendon Status     Prom     To       NEMA Active     DR.M. Sendon Statud     DR.M. Sendon Statud     Prom     To       DR.M. Sendon DR Statud     DR.M. Sendon DR Statud     DR Sendon Statud     Prom     To       DR.M. Sendon DR Statud     DR CT Nowaka Statudord     DR Sendon Statud     Prom     To       DR M. Sendon DR Statud     DR CT Nowaka Statudord     DR Sendon Statud     Prom     To       DR M. Contrait </th <th>Resource Characteristics     Dates       Capacity Resource Name (ID)     Market Participant Name (ID)     Request ID     Re</th> <th>dit Request Search</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	Resource Characteristics     Dates       Capacity Resource Name (ID)     Market Participant Name (ID)     Request ID     Re	dit Request Search							
Capacity Resource Name (ID)       Market Participant Name (ID)       Request ID       Requ	Expectity Resource Name (ID)     Market Participant Name (ID)     Request ID     Submitted       benand Response Resource Name (ID)     Designated Entity Name (ID)     Audit Type     Post Dispatch Audit     Actual Audit Date       capacity Resource Type     Agregation Zone     Audit Status     Audit Window Start       capacity Resource Type     Agregation Zone     Audit Status     Audit Window Start       ComPetity     DR ME, Marine     DR ME, Marine     DR ME, Marine     Dispatch Audit     Audit Window Start       DR ME, Marine     DR ME, Marine     DR ME, Marine     Dispatch Entry     Audit Window Start     From     To       DR ME, Marine     DR ME, Marine     DR ME, Marine     DR ME, Marine     Dispatch Entry     Participant     Audit Window Start       DR ME, Marine     DR ME, Marine     DR ME, Marine     DR ME, Marine     Dispatch Entry     Participant     Audit Window End       DR ME, Marine     DR ME, Marine     DR ME, Marine     DR ME, Marine     Participant     Participant     Audit Window End       DR ME, Marine     DR ME, Cameral     DR ME, Cam	esource Characteristics		Audit Reque	st Characteristi	cs	Dates		
autocomplete autoc	autocomplete       autocomplete       From       To         Demand Response Resource Name (ID)       Designated Entity Name (ID)       Audit Type       Post Dispatch Audit       Actual Audit Date         autocomplete       autocomplete       All       All       Addit Vindow Start         Capacity Resource Type       Agregation Zone       Audit Status       Audit Vindow Start         On Prakk Sessaonal Poek       DER ME, Mame DR ME, Capacity       Audit Status       Audit Window Start         NetWater ME       DR ME, Mame DR ME, Mame Status       DR ME, Mame DR ME, Capacity       DR ME, Mame DR ME, Capacity       DR ME, Mame DR ME, Capacity       DR ME, Capacity </td <td>apacity Resource Name (ID)</td> <td>Market Participant Name (ID)</td> <td>Request ID</td> <td>Requester Nam</td> <td>ie (ID)</td> <td>Submitted</td> <td></td> <td></td>	apacity Resource Name (ID)	Market Participant Name (ID)	Request ID	Requester Nam	ie (ID)	Submitted		
Demand Response Resource Name (ID)       Designated Entity Name (ID)       Audit Type       Post Dispatch Audit       Audit Type       Post Dispatch Audit       Audit Mindow Start         Capacity Resource Type       Agregation Zone       Audit Status       Audit Window Start       Prom       To         Con Pask Sector       DR ME, Kaina Book       DR ME, Kaina DR ME, Kaina Book       Audit Status       Audit Window Start       Prom       To         Con Pask Sector       DR ME, Kaina DR ME, Kaina Book       DR ME, Kaina DR ME, Kaina Book       DR ME, Kaina DR ME, Kaina DR ME, Kaina DR ME, Kaina DR ME, New Hampshre DR ME, Songhald DR ME, Vestern DR ME, Postand DR ME, Po	Demand Response Resource Name (ID)     Designated Entity Name (ID)     Audit Type     Post Dispatch Audit     Audit Vindow Start       To Paul:     Audit Status     Audit Status     Audit Window Start       To Paul:     DB ME, Marie To Designated Entity Name (ID)     Audit Status     Audit Window Start       To Paul:     DB ME, Marie To Designated Entity Name (ID)     Audit Status     Audit Window Start       To Paul:     DB ME, Marie To Designated Entity Name (ID)     Audit Status     Audit Window Start       To Paul:     DB ME, Marie To Designated Entity Name (ID)     DB ME, Marie To Designated Entity Name (ID)     Audit Status     Audit Window Start       To Designated Entity Name (ID)     DB ME, Marie To Designated Entity Name (ID)     DB ME, Marie To Designated Entity Name (ID)     Audit Window Start     To Designated Entity Name (ID)       Option To Designated Entity Name (ID)     DB ME, Marie To Designated Entity Name (ID)     DB ME, Marie To Designated Entity Name (ID)     DB ME, Marie To Designated Entity Name (ID)     Audit Window End       NeMA     DB ME, Marie To Designated Entity Name (ID)     Audit Window End       VestOrcharl Mass (WCMA)     DB ME, Marie To Designated Entity Name (ID)     DB ME, Marie To Designated Entity Name (ID)     DB ME, Marie To Designated Entity Name (ID)     Designated Entity Name (ID)	autocomplete	autocomplete		autocomplete		From	To	
Buttocomplete       autocomplete       All       All       From       To         Capacity Resource Type       Agregation Zone       Autit Status       Audit Window Start         On Preak Seasonal Poek Active       DR.M. StMan       Audit Status       Audit Window Start         On Preak Active       DR.M. StMan       DR.M. StMan       DR.M. StMan       To         Out Zone       DR.M. StMan       DR.M. StMan       DR.M. StMan       Audit Status       Audit Window Start         RMA Weither       DR.M. Stans       DR.M. StMan       DR.M. Stans       DR.M. StMan       DR.M. Stans       Audit Status       Audit Window End         RMA Weither       DR.M. Stans       DR.M. Stans<	Buttocomplete     All     All     From     To       Capacity Resource Type     Aggregation Zone     Audit Status     Audit Mindow Start       On Pask Resource Type     DPR ME, Name Description     DPR ME, Name Description     Audit Status     Audit Mindow Start       On Pask Retro     DPR ME, Name Description     DPR ME, Name Description     Audit Status     Audit Mindow Start       Order     DPR ME, Name Description     DPR ME, Name Description     Audit Status     Audit Mindow Start       DR ME, Status     DPR ME, Name Description     DPR ME, Name Description     Audit Mindow Start     From     To       NetWa     DR ME, Spansfield DR ME, Pender, Status     PRAME, REVIEW, ORDER/LETES PENDING SCHEDUEDE WATING_FOR_DISPATCH_DATA     Prom     To       Very Mediant Web/Control Mame, Web/Retro     DR ME, Spansfield DR ME, Panda, Spansfield DR ME, Panda, Status     PROME, Spansfield DR ME, Panda, Spansfi	emand Response Resource Name (ID	Designated Entity Name (ID)	Audit Type	Post Disp	atch Audit	Actual Audit D	Jate	
Barachy Resource Type     Aggregation Zone     Audit Status     Audit Window Start       Ch Peak Seasonal Poak Active     DR.Mf. Maine DR.Mf. Statu     DR.Mf. Maine DR.Mf. Status     CANCELLED COMPLETE DR.Mf. Status     Converter Complete DR.Mf. Status     Audit Window Start       Cod Zone     DR.Mf. Maine DR.Mf. Status     DR.Mf. Maine DR.Mf. Status     Converter DR.Mf. Status     Converter Converter DR.Mf. Status     Converter DR.Mf. Converter DR.Mf. Portional DR.Mf.	Barachy Resource Type     Aggregation Zone     Audit Status     Audit Window Start       On Peak Seasonal Poak Active     DR.M. Season DR.M. Season Active     DR.M. Season DR.M. Sea	autocomplete	autocomplete	Ali	✓ All	~	From	To	
On Peak Seasonal Peak Active     DR.ME_Manne DR.ME_SEMA DR.MT_Vemont     DR.ME_Manne DR.MT_SEMA BR.MT_Vemont     To       add Zone     DR.MT_Vemont     DR.MT_Vemont     To       BR.T_Vemont     DR.MT_Vemont     DISPATCH LPDC DISPATCH	On Peak Seasonal Peak Active     DR.ME. Maine DR.M. SEMA DR.M. SEMA DR.M. SEMA DR.M. SEMA DR.M. Sema DR.M. Sema DR.CT. Version: DR.M. Sema DR.CT. Version: DR.M. Sema DR.CT. Version: DR.M. Sema DR.M. Sema DR.M. Sema DR.CT. Version: DR.M. Sema DR.M. S	spacity Resource Type	Aggregation Zone	Audit Status			Audit Window	Start	
Seasonal Peak: Active add Zone DR CT Versions SWCT DR CT Season DR ME Season CT Versions SwcT DR ME Versions Version CT Versions SwcT DR ME Season CT Versions SwcT DR ME Seas	Seasonal Peak: Active DR ML SEMA DR CT Vemont	On Peak	DR.ME_Maine	CANCELLED			From	To	
BR CT, Western, SWCT     DRR CT, Western, SWCT     DISAPT/CH_RECEIVED     From     To       BR CT, Western, SWCT     DRR MF, New, Mannage     DRR MF, New, Mannage     DRR MF, New, Mannage     DRR MF, New, Mannage       DR MF, New, Mannage     DRR MF, New, Mannage     DRR MF, New, Mannage     DRR MF, New, Mannage     DRR MF, New, Mannage       DR MF, New, Mannage     DRR MF, New, Mannage     DRR MF, Saachad     DRR MF, Saachad     DRR MF, Saachad       DR MF, Saachad     DRR MF, Saachad     DRR MF, Saachad     DRR MF, Saachad     DRR MF, Saachad       DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad       DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad       DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad       DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad       DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad       DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad       DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad     DR MF, Saachad       DR MF, Viritow     DR MF, Saachad     DR MF, Saachad     DR MF, Saacha	BR CT, Western, SWCT     DRR CT, Western, SWCT     DRR CT, Western, SWCT     DRR CT, Moralis, SWCT       DRR MA, May, Hampshire     DRR MT, May, Hampshire     DRR MT, May, Hampshire     DRR MT, May, Hampshire       DRR MT, May, Hampshire     DRR MT, May, Hampshire     DRR MT, May, Hampshire     DRR MT, May, Hampshire       DRR MT, May, Hampshire     DRR MT, May, Hampshire     DRR MT, May, Hampshire     DRR MT, May, Hampshire       DRR MT, May, Hampshire     DRR MT, May, Hampshire     DRR MT, May, Hampshire     DRR MT, May, Hampshire       DRR MT, Saacadat     DRR MT, Saacadat     DRR MT, Saacadat     DRR MT, Saacadat       DRR MT, Roode, Island     DRR MT, Roode, Island     DR MT, Saacadat       DR MT, Saacadat     DR MT, Saacadat     Wathing, For, DisPATCH, DATA       DR MT, Saacadat     DR MT, Saacadat     Wathing, For, DisPATCH, DATA       DR MT, Saacadat     DR MT, Saacadat     Wathing, For, DisPATCH, DATA       DR MT, Saacadat     DR MT, Saacadat     Wathing, For, DisPATCH, DATA       DR MT, Saacadat     DR MT, Saacadat     Wathing, For, DisPATCH, DATA       DR MT, Saacadat     DR MT, Saacadat     Wathing, For, DisPATCH, DATA       DR MT, Saacadat     DR MT, Saacadat     Wathing, For, DisPATCH, DATA       DR MT, Saacadat     DR MT, May, Mangatat     Paticipant       DR MT, Saacadat     DR MT, May, Mangatat     Paticipant </td <td>Seasonal Peak Active</td> <td>DR MA_SEMA DR.VT_Vermont</td> <td>COMPLETE DISPATCH_E</td> <td>NDED</td> <td></td> <td>Audit Window</td> <td>End</td> <td></td>	Seasonal Peak Active	DR MA_SEMA DR.VT_Vermont	COMPLETE DISPATCH_E	NDED		Audit Window	End	
RP     DBLAH, New, Hampsthere     DPLAH, Rev, Hampsthere       DR AH, Standord     DPLAH, New, Hampsthere       DR AH, Standord     DR AH, Standord       DR AH, Corrall     DR AH, Standord       DR AH, Standord     DR AH, Standord       DR AH, Corrall     DR AH, Standord       DR AH, Standord	BR NH, New Hampstree     DR NH, New Hampstree     DR NH, New Hampstree     DR NH, Sexpondiad     DR NH, S	oad Zone	DR.CT_Western_SWCT DR.MA_Boston	DISPATCH_R EXPIRED	ECEIVED	21	From	To	
Request Window Window Resource Name (ID) Type Source Audit Status Name (ID) Audit 1	Request Window Window II Capacity II Capacity II Capacity II Actual Participant Actual Participant Actual Resource Name Demand Response Resource Actual Actual Participant Actual	RI NEMA WestCentral Mass (WCMA) ME SEMA CT CT VT NH	UK WA Springhes DR MA, Western DR CT, Norvaik-Stanford DR CT, Norvaik-Stanford DR KT, Steacoast DR MT, Portrad DR MT, Steacoast DR MT, Portrad DR MT, Steacoast DR MT, Portrad DR MT, Steacoast DR MT, Portrad	INTIAL REV PARTIALLY ( PENDING SCHEDUED WAITING_FO	EW IN PROGRES	s 1A			
	D Start cito Audit Status Name (ID) Audit Status Name (ID) Audit	eques <sup>17</sup> Window <sup>11</sup> Window O Start End	Capacity II Resource Name Dr Audit Type (ID) R	mand Response source Name (ID)	Capacity Resource Type	Audit Source	II Audit Status	Market II Participant Name (ID)	Q Search Actual Audit Date
19171 03/05/2018 03/12/2018 Seasonal ZME04A (60673) CUSTOMER WAITING_FOR_DISPATCH_DATA Testing Customer 03/05/2	89171 03/05/2018 03/12/2018 Seasonal ZMED4A (60873) CUSTOMER WAITING_FOR_DISPATCH_DATA Testing Customer 03/05	9171 03/05/2018 03/12/2018	Seasonal Zh	IE04A (60873)		CUSTOMER	WAITING_FOR_DISPATCH_DATA	Testing Customer	03/05/2018

- 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.

Capacity Resource Type	CSO MW	Net CSO	Demand Response Res	source Name (ID)	Audit Res	ults	Load Zone N	lame (ID)
SEASONAL_PEAK	3.639	MW					CT (4004)	
		3.369						
Capacity Resource Name (	(ID)		Designat	ted Entity Name (ID	)	Aggregation	Zone Name	
Demand Capacity Resource	e 46 (9103)					(ID)		÷
Dates								
Submitted	Audit Wind	ow Start	Audit Window End	Actual Audit	Start	Actual Audit	End	Earliest Audit Expiration
03/27/2018 10:12	04/03/2018	1	05/15/2018					
Actual Audit Month	I.							
C Edit								ancel this Audi

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 "<u>Accessing A&TT</u>" 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:

						ATT Test Custom
Capacity Resources	Demand Response Reso	urces Assets	Audit Requests			
apacity Resource S	earch					
As Of Date* Capacity Res	source Type Load Zo	one Name (ID)	Dispatch Zone Name (ID)	Aggregation Zone Name (ID)	Reserve Zone Name (ID)	
03/15/2018 Active (ACT	IVE)	~	×	×	~	
			Designed Factor News (ID)			
Capacity Resource Name (ID)	Capaci	ty Resource Status	Designated Entity Name (ID)	Market Participa	ant Name (ID)	
autocomplete	AGTIN	VE V	sutocomplete	sutocomplete		
Request Audit(s)	Canacity Resource Name	Market Particinan	t Name (ID) 💠 Canacity Resou	Irce Type 11 Load Zone Name //F	)) It Angregation Zone	Name (ID)
Capacity Resource ID 37924	Capacity Resource Name Demand Capacity Resource	Market Participan 2150 Testing Customer	tt Name (ID) TCapacity Resou (128728) ACTIVE	rrce Type 👔 Load Zone Name (IE SEMA (4006)	D) Aggregation Zone DR.MA_SEMA (761	Name (ID) 11
Request Audit(s) Capacity Resource ID 37024 37030	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource	11 Market Participan 2150 Testing Customer 2156 Testing Customer	t Name (ID)    Capacity Resou (128728) ACTIVE (128728) ACTIVE	Load Zone Name (IE SEMA (4008) CT (4004)	D) Aggregation Zone DR.MA_SEMA (761 DR.CT_Eastern (76	Name (ID) 13 3) 00)
Capacity Resource ID 37924 37930 37942	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource	Market Participan 2150 Testing Customer 2156 Testing Customer 2168 Testing Customer	t Name (ID)    Capacity Resou (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE	Troe Type Load Zone Name (IC SEMA (4008) CT (4004) VT (4003)	D) II Aggregation Zone DR.MA_SEMA (761 DR.CT_Eastern (76 DR.VT_Vermont (76	Name (ID) 11 3) 00) 315)
Capacity Resource ID           37924           37942           37944	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource	Market Participan 2150 Testing Customer 2156 Testing Customer 2168 Testing Customer 2170 Testing Customer	t Name (ID) (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE	rrce Type ⊥ Load Zone Name (IE SEMA (4006) CT (4004) VT (4003) West/Central Mass (V	Aggregation Zone DR.MA_SEMA (761 DR.CT_Eastern (76 DR.VT_Vermont (76 NCMA) (4007) DR.MA_Western (71)	Name (ID) 3) 00) 315) 618)
Request Audit(s)  Capacity Resource ID  37024  37090  37942  37944  37093	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource	Market Participan 2150 Testing Customer 2150 Testing Customer 2160 Testing Customer 2170 Testing Customer 2190 Testing Customer	t Name (ID) 11 Capacity Resou (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE	rree Type  ☐ Load Zone Name (IE SEMA (4008) CT (4004) VT (4003) West/Central Mass (V CT (4004)	D) II Aggregation Zone DR.MA_SEMA (761 DR.CT_Eastern (76 DR.VT_Verment (72 DR.VT_Verment (72 DR.KA_Western (76 DR.CT_Eastern (76	Name (ID) 11 3) 00) 315) 618) 00)
© Request Audit(s) Capacity Resource ID 37024 37030 37042 37043 37043 37043 37043 37093 38125	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource	Market Participan 2150 Testing Customer 2156 Testing Customer 2168 Testing Customer 2170 Testing Customer 2190 Testing Customer 2263 Testing Customer	t Name (ID) 11 Capacity Resou (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE	Image: Set MA (4008)         CT (4004)           VT (4003)         VT (4003)           VT (4003)         CT (4004)           ME (4001)         ME (4001)	Aggregation Zone DR.Ma_SEMA (761 DR.CT_Eastem (76 DR.VT_Vermont (77 NCMA) (4007) DR.Ma_Westem (77 DR.Ma_Westem (78 DR.OT_Eastem (76 DR.Ma_Mate (780 DR.Ma_Mate (780 DR.Ma_Mate (780 DR.Ma_Mate (780 DR.Ma_Mate (780 DR.Ma_Mate (780 DR.Mate (78	Name (ID) 11 3) 00) 315) 618) 00) 8)
Request Audit(s)     Capacity Resource ID     37024     37030     37942     37044     37044     37043     38125     38128	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource Demand Capacity Resource	Market Participan 2150 Testing Customer 2158 Testing Customer 2168 Testing Customer 2100 Testing Customer 2100 Testing Customer 2284 Testing Customer 2284 Testing Customer	t Name (ID)  Capacity Resource (129728) ACTIVE	troe Type ⊥ Load Zone Name (ID SEMA (4000) CT (4004) VT (4003) West/Central Mass (i CT (4004) ME (4001) NH (4002)	Aggregation Zone           DR MA_SEBMA (761)           DR.CT_Eastem (76           DR.VT_Vermont (71)           DR.VT_Vermont (71)           DR.TT_Eastem (76           DR.WT_Maxwell           DR.WT_Weith (4007)           DR.WT_Maxwell           DR.WT_Weith (4007)           DR.WT_Maxwell           DR.WT_Weith (4007)           DR.WT_Weith (4007)           DR.WT_Weith (4007)           DR.WT_Weith (4007)           DR.WT_Weith (4007)	Name (ID) 11 3) 000) 5155 6185 000 00 00 00 00 00 00 00 00 00 00 00 0
Capacity Resource ID 37024 37030 37042 37043 37044 37093 38125 38125 38127	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource	Image: Second	t Name (ID)      Capacity Resource     Capacity Resource     Capacity Resource     Capacity Resource     Capacity Resource     Capacity     Capacity	Ince Type II Load Zone Name (ID SEMA (4006) CT (4004) VT (4003) West/Central Mass (k CT (4004) ME (4001) NEMA (4005)	Aggregation Zone           DR AM_SEEMA (761)           DR CT_Eastem (76           DR M_Westem (710)           DR M_Main (780)           DR M_N.Net/Net/Men           DR M_MA_North_Short	Name (ID) 11 3) 00) 515 618) 00) 63 8) 9) 9) 9) 9) 9) 9) 9) 9) 9) 90 90 90 90 90 90 90 90 90 90 90 90 90
© Request Aud8(s)  Capacity Resource ID  37924  37930  37942  37944  37993  38125  38125  38128  38127  38138	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource	Imarket Participan           2150         Testing Customer           2168         Testing Customer           2168         Testing Customer           2169         Testing Customer           2169         Testing Customer           2160         Testing Customer           2160         Testing Customer           2160         Testing Customer           2283         Testing Customer           2284         Testing Customer           2285         Testing Customer           2276         Testing Customer	t Name (ID) 11 Capacity Resour (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE (128728) ACTIVE	troe Type         II Load Zone Name (IZ         SEMA (4006)         CT (4004)         VT (4003)         West/Central Mass (         CT (4004)         ME (4001)         NH 4000)         NH 4008)         West/Central Mass (         West/Central Mass (	Aggregation Zone           DR MA_SEMA (761           DR OT_Eastern (76           DR VT_Vermont (72           WCMA) (4007)           DR CT_Eastern (76           DR CT_Eastern (76           DR CT_Eastern (76           DR MA_Western (71           DR MA_Notht, Shoh           DR MA_Notht, Shoh           NKMA, Noth, Shoh           NKMA, (4007)           DR MA_Western (77	Name (ID) 11 3) 000) 3155) 618) 000) 630 630 630 630 630 76109 76109 818)
© Request Audit(s) Capacity Resource ID 37024 37030 37042 37043 37043 37043 37043 37043 37043 37043 38125 38126 38127 38128 38324	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource	Market Participan 2150 Search Customer 2150 Testing Customer 2160 Testing Customer 2170 Testing Customer 2100 Testing Customer 2284 Testing Customer 2285 Testing Customer 2285 Testing Customer 2285 Testing Customer 2384 Testing Customer	Name (ID)         Capacity Rescu           (127728)         ACTIVE           (128728)         ACTIVE	troe Type          ⊥         Load Zone Name (ID         SEMA (4006)         CT (4004)         VT (4003)         West/Central Mass (t         CT (4004)         ME (4001)         MH (4002)         NEMA (4008)         West/Central Mass (t         SEMA (4008)	Aggregation Zone           OR MA_SEMA (761           OR CT_Eastem (76           DR CT_Eastem (76           DR VT_Vermont (71           OR CT_Eastem (76           DR NH_Westem (76)           DR NH_Nee_Hamp           DR NM_Neeter (76)           OR MA_Lover, (56)           OR MA_Lover, (76)	Name (ID) 33 30 515 515 618 000 00 00 00 00 00 00 00 00 00 00 00 0
Request Audit(s)           Capacity Resource ID           37024           37030           37944           37093           38125           38126           38138           39324           39343	Capacity Resource Name Demand Capacity Resource	Market Participan 2490 Testing Customer 2498 Testing Customer 2490 Testing Customer 2490 Testing Customer 2490 Testing Customer 2495 Testing Customer 2495 Testing Customer 2494 Testing Customer 2494 Testing Customer 2494 Testing Customer 2495 Testing Customer 2495 Testing Customer	t Name (ID)         Capacity Rescu           (128728)         ACTIVE	Load Zone Name (ID SEMA (4006) CT (4004) VT(4003) West/Central Mass (k CT (4004) ME (4001) NEMA (4008) West/Central Mass (k SEMA (4006) SEMA (4006)	Aggregation Zone           DR M.MSEMA (761           DR.CT_Eastem (78           DR.UT_Eastem (78           DR.UT_Eastem (78           DR OT_Eastem (78           DR ME_Maine (780           DR ME_Maine (780           DR MA_Westem (71           DR MA_Westem (71           DR MA_North_Short           DR MA_North_Short           DR MA_North_Short           DR MA_Lower, SEE           DR MA_Laware, SEE	Name (ID) 33 3000) 315) 518) 00) 53hire (7610) 7610) 7610) 618) 60
Request Audit(s)           27024           37030           37042           37043           37044           37093           38125           38125           38126           38127           38138           38324           390943	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource	Image: Second	t Name (ID)      Capacity Resourt     Capacity Resource     Capacity ACTIVE	IT Can be a set of the	Aggregation Zone           DR MA_SEMA (761           DR OT_Eastern (76           DR OT_Eastern (76           DR OT_V_vermoti (72           WCMA) (4007)         DR MA_Western (76           DR OT_Eastern (76           DR ML_News_Hamp           DR MA_Western (70           DR MA_Seningfield           WCMA) (4007)         DR MA_Seningfield	Name (ID) 3) 3) 3) 500 515 615 600 600 600 618 618 618 618 618 618 618 618
Request Audit(s)           Capacity Resource ID           37024           37030           37042           37043           37044           37003           38125           38126           38128           38128           38128           38128           38128           38224           38064           38878	Capacity Resource Name Demand Capacity Resource Demand Capacity Resource	Imarket Participan           2150         Festing Customer           2168         Testing Customer           2168         Testing Customer           2169         Testing Customer           2169         Testing Customer           2160         Testing Customer           2160         Testing Customer           2161         Testing Customer           2162         Testing Customer           2163         Testing Customer           2174         Testing Customer           2184         Testing Customer	t Name (ID) 11 Capacity Resour (128728) ACTIVE (128728) ACTIVE	tree Type ⊥ Load Zone Name (ID         SEMA (4006)         CT (4004)         VT (4003)         WestCental Mass (t         CT (4004)         ME (4001)         ME (4001)         NH (4002)         NEMA (4008)         WestCentral Mass (t         SEMA (4008)         ME (4001)         ME (4001)         WestCentral Mass (t         CENTRA (1008)         ME (4001)         WestCentral Mass (t         CENTRA (1008)         ME (4001)         ME (4001)         ME (4001)         ME (4001)         ME (4001)         WestCentral Mass (t         CENTRA (1008)         ME (4001)         ME (4002)         ME (4002)         ME (4002)         ME (4001)         ME (4002)         ME (4002	Aggregation Zone           DR MA_SEMA (761           DR OT_Eastern (76           DR VT_Vermont (74           WCMA) (4007)         DR.KM_Western (76           DR NM_Newstern (76           DR MA_Notest, Tool           DR MA_Lower, SEN           DR MA_Springfield           XCMA) (4007)         DR MA_Western (70           DR MA_Lower, SEN           DR MA_Springfield           XCMA) (4007)         DR MA_Western (70	Name (ID) 3 3)

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

As Of	Capacity Resource Name (ID	2)		Capacity Resource Type	Net CSO MW			
03/15/2018	Demand Capacity Resource	2263 (38125)		ACTIVE	32.354			
Load Zone Name (ID)		Aggregation Z	one Name (ID)	Dispatch Zone Name (ID)	Reserve Zone Name (ID)			
ME (4001)		DR.ME_Maine	(7606)	Maine (7505)		ROS (7000)		
Testing Custo	pant Name (ID) mer (128728)	Designated En	tity Name (ID)					
Testing Custo	pant Name (ID) mer (128728) y Mapped Demand Response	Designated En	tity Name (ID)					
Testing Custo Capability Histor	y Mapped Demand Response	Resources	tity Name (ID)	Audit Date		T Expires	Status	11
Testing Custo Capability Histor Effective 01/01/2018	y Mapped Demand Response U SUMMER	Resources	tify Name (ID)	Audit Date		tt Expires	IT Status	11
Testing Custo Capability Histor Effective 01/01/2018	y Mapped Demand Response U Season SUMMER UMACTOR	Resources	tity Name (ID) ∐ Audit Request ID	👔 Audit Date		IT Expires	11 Status	

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

Resource In	formation				
As Of	Capacity Resource Name (ID	)	Capacity Resource Type	Net CSO MW	
03/15/2018	Demand Capacity Resource	2263 (38125)	ACTIVE	32.354	
Load Zone Nar	ne (ID)	Aggregation Zone Name (ID)	Dispatch Zone Name (ID)		Reserve Zone Name (ID)
ME (4001)		DR.ME_Maine (7606)	Maine (7505)		ROS (7000)
Testing Custo	mer (128728)	Designated Entry Name (D)			
Testing Custo	mer (128728) y Mapped Demand Response	Resources			
Testing Custo Capability Histor	mer (128728) y Mapped Demand Response	Resources Name			
Testing Custo Capability Histor ID 60826	mer (128728)	Resources Name DRR 6682	0		
Testing Custo Capability Histor ID 60826 60870	mer (128728) y Mapped Demand Response Link to DRR	Resources Name DRR 6082 DRR 6082	8 0		

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



## **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:

t and T	Capacity Resources Demar	nd Response Resourc	es Assets A	udit Requests			ATT Test Customer 1 Te
set Sear	rch						
As Of Date*	Asset Name(ID)		Capacity Resource Type	Capacity Resource Name	; (ID)	Audit Effective Date	
03/20/2018	autocomplete			✓ autocomplete		From	То
Designated En	ntity Name (ID)	Demand Resource	e Name (ID)			Audit Expiration Date	
autocomplete		autocomplete				From	To
							Q Search
Asset ID	Asset Name	11 Market Partic	ipant Name (ID) 11 Capac	ity Resource Name (ID)	Demand Response Reso	urce Name (ID) 👔 Des	Ignated Entity Name (ID)
22224	OP Energy Efficiency	Testing Custo	mer (120720)				
22224	UP Energy Eniciency Politiono	Testing Custo	mer (120720) Domo	d Capacity Resource 1207 (10045)			
22220	LED PORTOIO OF-EE	Testing Custo	mer (120720) Demai	d Capacity Resource 1367 (12645)			
34545	Feature Detterin CD FF	Testing Custo	mer (120720) Demai	d Capacity Resource 31 (9100)			
34040	Com & Res SD EE	Testing Custo	mer (120720) Demai	iu Capacity Resource 1346 (12006)			
46727	Elastria Compony CRIM	Testing Custo	mer (120720) Domo	ad Canasity Resource 1606 (16547)			
ennes	Diant 1	Testing Custo	mer (120720) Demai	nd Capacity Resource 1656 (16547)	704/040.000 (608.40)	Tool	ing Customer (120720)
60000	DR Store	Testing Custo	mer (128728)	iu Gapacity (Cesource 2450 (50070)	ZCTMA029 (00040)	Test	ing Customer (128728)
60097	College 1	Testing Custo	mer (128728) Demai	nd Canacity Recourse 2400 (38878)	ZIA/MA029 (60840)	Teel	ing Customer (128728)
60113	Diant 2	Testing Custo	mer (128728) Demai	nd Capacity Resource 2490 (38878)	ZWMA029 (60840)	Teel	ing Customer (128728)
60137	Rusiness 2	Testing Custo	mer (128728) Demai	nd Capacity Resource 2490 (38878)	ZWMA029 (60840)	Test	ing Customer (128728)
60151	Business 3	Testing Custo	mer (128728) Demai	nd Capacity Resource 2490 (38878)	ZWMA029 (60840)	Tes	ting Customer (128728)
60152	Business 1	Testing Custo	mer (128728) Demai	nd Capacity Resource 2490 (38878)	ZWMA029 (60840)	Tes	ting Customer (128728)
60181	Marx Brothers Community Farms	Testing Custo	mer (128728) Demai	nd Canacity Resource 2168 (37942)	Z\/T039 (60856)	Test	ling Customer (128728)
60193	College 2	Testing Custo	mer (128728) Demai	nd Capacity Resource 2490 (38878)	ZWMA029 (60840)	Tesi	ting Customer (128728)
60198	Factory 2	Testing Custo	mer (128728) Demai	nd Capacity Resource 2490 (38878)	ZWMA029 (60840)	Test	ing Customer (128728)
60217	College 4	Testing Custo	mer (128728) Demai	nd Capacity Resource 2490 (38878)	ZWMA029 (60840)	Test	ting Customer (128728)
60221	DR Plant	Testing Custo	mer (128728)		ZNW/T050 (60879)	Test	ting Customer (128728)
60234	Fidget Spinner Factory	Testing Custo	mer (128728)		ZME04A (60873)	Test	ting Customer (128728)
« < 1	2 3 4 5 6 7 > >			CSV Export			Displaying 1 to 20 of 133

- Click on the hyperlink in the "Asset ID" column to view asset details.
   Asset Results History displays:

Audit and	l Testing	Tool					Tes ATT Test (	ting Customer (12) Customer 1 Test U
Dashboard	Capacity Res	sources	Demand Response Re	esources Assets	Audit Requests			
Asse	t Details							
As 0 03/ Res	ource Details	ame (ID) (60053)						
Capa	acity Resource Ty	pe Capaci	ty Resource Name (ID)		Demand Response Resource I	Name (ID)		
AC	TIVE	Dema	nd Capacity Resource 24	90 (38878)	ZWMA029 (60840)			
Con	npanies							
Desi	gnated Entity (ID)							
Tes	ting Customer (128	3728)						
Aud	it Result Histor	у						
Effe	ctive 17	Season	Value MW	Audit Request I	D Audit Date	LT Expires	Status	II
01/0	1/2018	SUMMER	1.810	88910	04/20/2018	08/31/2019	APPROVED	
01/0	1/2018	WINTER	2.679	88911	01/20/2018	03/31/2019	APPROVED	
«	< 1 > ≫			<u>▲</u> C	SV 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.

Request ID	Requestor Na	ame (ID)		Audit Type	Comment				
	SYS_CREAT	TE_MISSING_	SEASONAL_A	UDI Seasonal	ISO Initiated	d Seasonal Aud	t		
Audit Status		Audit	Post Dispat	tch Audit					
COMPLETE		CLISTOME	No						
Resource		COOTOMIC							
Capacity Res	ource Type	CSO MW	Net CSO	Demand Response Res	ource Name (ID)	Audit Result	s	Load Zone I	Name (ID)
ON_PEAK			MW					NEMA (400	08)
Capacity Res	ource Name (II	D)		Market P	articipant Name (II	D)	Designated E	ntity Name (I	D)
ID)	Zone Name								
Dates	Zone Name								
ID) Dates Submitted	zone name	Audit Windo	ow Start	Audit Window End	Actual Audit	Start	Actual Audit I	End	Earliest Audit Expira
Dates Submitted 08/01/2017 0	20 <b>ne Name</b>	Audit Windo 08/02/2017	ow Start	Audit Window End 08/30/2017	Actual Audit 08/25/2017	: <b>Start</b> 00:00	Actual Audit 1 08/25/2017 0	<b>End</b> 0:00	Earliest Audit Expira 08/31/2018
Dates Submitted 08/01/2017 0	10:20 Month	Audit Windo 08/02/2017	ow Start	Audit Window End 08/30/2017	Actual Audit 08/25/2017	: <b>Start</b> 00:00	Actual Audit I 08/25/2017 0	<b>End</b> 0:00	Earliest Audit Expire 08/31/2018
ID) Dates Submitted 08/01/2017 0 Actual Audit I 08/25/2017	10:20 Month	Audit Windo 08/02/2017	ow Start	Audit Window End 08/30/2017	Actual Audit	• <b>Start</b> 00:00	Actual Audit I 08/25/2017 0	<b>End</b> 0:00	Earliest Audit Expira 08/31/2018
ID) Dates Submitted 08/01/2017 0 Actual Audit I 08/25/2017	0:20 Month	Audit Windo 08/02/2017	ow Start	Audit Window End 08/30/2017	Actual Audit	: <b>Start</b> 00:00	Actual Audit 1 08/25/2017 0	<b>End</b> 0:00	Earliest Audit Expira 08/31/2018
Dates Submitted 08/01/2017 0 Actual Audit I 08/25/2017	20ne Name	Audit Windc 08/02/2017	ow Start	Audit Window End 08/30/2017	Actual Audit	: <b>Start</b> 00:00	<b>Actual Audit I</b> 08/25/2017 0	<b>End</b> 0:00	Earliest Audit Expira 08/31/2018
Dates Submitted 08/01/2017 0 Actual Audit I 08/25/2017	0:20 Month	Audit Windo 08/02/2017	ow Start	Audit Window End 08/30/2017	Actual Audit	5 <b>Start</b> 00:00	Actual Audit I 08/25/2017 0	End 0:00	Earliest Audit Expira 08/31/2018
Dates Submitted 08/01/2017 0 Actual Audit I 08/25/2017	00:20 Month	Audit Windc 08/02/2017	ow Start	Audit Window End 08/30/2017	Actual Audit	: <b>Start</b> 00:00	Actual Audit 08/25/2017 0	<b>End</b> 00:00	Earliest Audit Expira 08/31/2018
Dates Submitted 08/01/2017 0 Actual Audit I 08/25/2017 it Results atus	00:20 Month	Audit Windo 08/02/2017	ow Start	Audit Window End 08/30/2017 Date Effective	Actual Audit	Start 00:00 Date Expi	Actual Audit I 08/25/2017 0	<b>End</b> 0:00	Earliest Audit Expira 08/31/2018
Dates Submitted 08/01/2017 0 Actual Audit I 08/25/2017 it Results atus omplete	00:20 Month Status History	Audit Windo 08/02/2017	ow Start	Audit Window End 08/30/2017 Date Effective 11/27/2017 11:57:10	Actual Audit	2 Start 00:00 Date Expi	Actual Audit I 08/25/2017 0	<b>End</b> 0:00	Comment
ID) Dates Submitted 08/01/2017 0 Actual Audit I 08/25/2017 Itt Results catus omplete tital Asset Rev	2012 Name Name No.20 Month Status History riew Complete	Audit Windo 08/02/2017	ow Start	Audit Window End 08/30/2017 08/30/2017 Date Effective 11/27/2017 11:57:10 09/06/2017 14:52:45	Actual Audit	2 Start 00:00 Date Expi 11/10/201	Actual Audit I 08/25/2017 0 08/25/2017 0 7 00:12:32	<b>End</b> 0:00	Comment

#### **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:

s Of Date*	Asset Na	Asset Name(ID)		Demand Response Resource Name (ID)			Capacity Resource Name (ID)			Resource Type		
05/24/2022	autocor	autocomplete		autocomplete Aggregation Zone Name			autocomplete					
							Load Zone Na	ame		Asset Status		
						~			~	Approved		
sset	et Name		DRR	Capacity Resource	11 Capacity Resource	11 Marke Partici Name	t Iî ipant S (ID) A	⊔t Sur Summer Aud	nmer L1 Summer dit Expiratio	Audit ⊔↑ n 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:
    - "<u>Get Started</u>" (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:
    - "<u>Get Started</u>" (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:
    - "<u>Get Started</u>" (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: <u>https://www.iso-ne.com/about/contact/business-hours</u>.

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

## 7.3 By Email



AskISO@iso-ne.com



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 <u>https://askiso.force.com</u> and click "Not a member?"

For more details about Ask ISO please refer to the <u>user guide</u>.