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March 29, 2018  
Webinar

# Passive Demand Resources Registration & Auditing

*On-Peak and Seasonal Peak Demand Resources*

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Analyst, Asset Registration & Auditing



# Introduction

# Acronyms

<b>ATT</b>	demand response audit test tool	<b>LM</b>	load management
<b>BLTS</b>	baseline telemetry system	<b>MPV</b>	monthly performance values
<b>CAMS</b>	Customer Asset Management System	<b>PFP</b>	pay for performance
<b>CSO</b>	capacity supply obligation	<b>PRD</b>	price-responsive demand
<b>DG</b>	distributed generation	<b>RTDR</b>	real-time demand response
<b>DRA</b>	demand response asset	<b>RTU</b>	remote terminal unit
<b>DRI</b>	demand response integration	<b>SA</b>	security administrator
<b>DRMUI</b>	demand response market user interface	<b>SMD</b>	Standard Market Design
<b>DRWG</b>	Demand Resources Working Group	<b>SMS</b>	Settlements Market System
<b>EE</b>	energy efficiency	<b>SSO</b>	single sign-on
<b>EEM</b>	energy efficiency measure database	<b>UI</b>	user interface
<b>eMkt</b>	eMarket		

# Price-Responsive Demand Training

Release Date	Training Title
Oct 23, 2017	Demand Resources Working Group: <a href="#">Fully Integrated Price Responsive Demand Presentation</a>
Nov 7, 2017	<a href="#">Price-Responsive Demand Overview</a>
Feb 28, 2017	<a href="#">Energy Market Offers &amp; Asset Management</a>
March 8, 2018	<a href="#">Q1 Settlements Forum</a>
March 22, 2018	<a href="#">Demand Response Registration</a>
March 27, 2018	<a href="#">Demand Response Auditing</a>
Today	<a href="#">Passive Demand Resource Registration and Auditing</a>

# Purpose

**Prepare lead market participants to use redesigned user interfaces for registering and auditing on-peak and seasonal peak demand resources that will go into effect with price-responsive demand (PRD) and pay for performance (PFP) on June 1, 2018**

# Objectives

## After watching this presentation you will be able to:

- Enroll a passive asset in the new Customer Asset Management System (CAMS) environment
- Schedule an audit, check audit status, and verify audit results in the new demand response audit and testing tool (ATT) environment
- Understand changes for uploading measure details to the energy efficiency measure (EEM) database
- Understand how timing of recording monthly performance values (MPVs) in CAMS affects scarcity condition performance scoring



# Topics

- Introduction
- PRD Overview
- SMD Homepage
- Enroll a Passive Asset in CAMS
- ATT tasks
- Data Reporting Requirements
- Changes to EE Data Reporting
- Pay for Performance

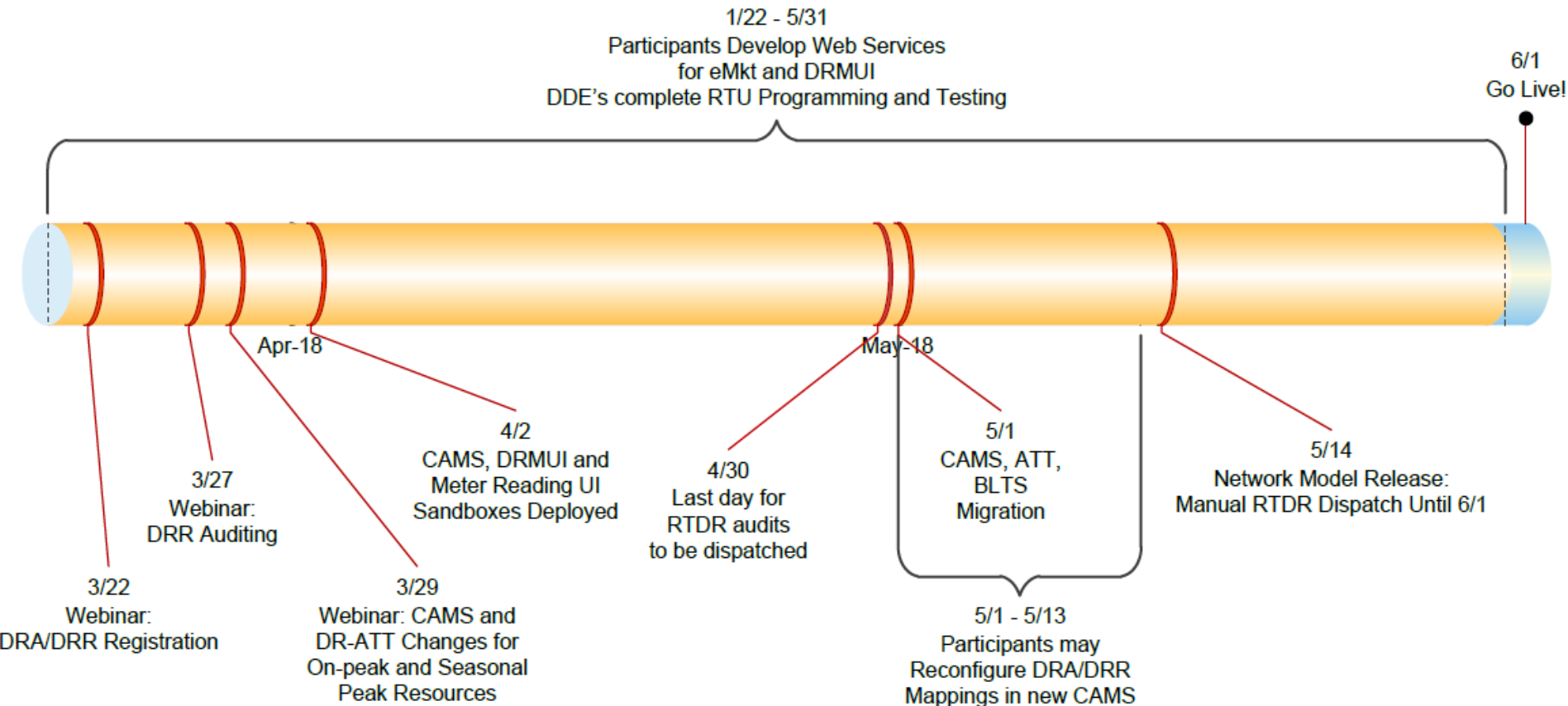
# PRD Overview

*Trista Ristvedt*



# Price Responsive Demand Project - High Level Timeline For Participant Use

Updated on 3/20/2018



Note: dates are subject to change

# What's Changing for Passive Demand Resources?

- Asset registration steps
- Audit request and review steps
- EEM – CAMS data key
- Timing for submitting performance values

# Cutover for Passive Demand Resources

All ready to respond passive assets and on-peak and seasonal peak demand resources existing as of **April 1, 2018** will be cutover to new systems *with no change to identification numbers or mappings*

- Changes made after April 1 will not be migrated to the new CAMS except for MPV values

## Additionally, cutover data

WILL include	Will NOT include
Historical MPV values	Historical service notes
Historical audit values	As many details as before

# Standard Market Design (SMD) Applications

*Access & Navigation*

# Single Sign-On (SSO) Requires a Digital Certificate

## Digital certificate required to access SMD applications

- Issued to your company's security administrator (SA) by ISO
- Your company's SA assigns your access
  - ***Demand Response Asset Maintainer*** role can enroll assets in CAMS
  - ***EEM Maintainer*** role can upload to the EEM database
  - ***Lead Participant Maintainer*** role can request audits in ATT

## SMD applications home page

- SSO page: <https://smd.iso-ne.com/>



If you don't know who your company's security administrator is,  
call ISO-NE Customer Support

Informational Links

[Transmission System Information](#)

[Satellite Information](#)

[LCC CMS](#)

[LCC Vision Learning](#)

External Systems

[JESS at NYISO](#)

**Internal Transactions**

**External Transactions**

**Bids & Offers  
(Registered Users)**

**Customer and Asset  
Management System**

**Financial Transmission Rights  
(Registered Users)**

**Forward Reserve Market  
Auction**

**Submit Meter Reading**

**CROW  
Outage Scheduler**

**Submit Peak Contribution**

**Forward Reserve Assignment**

**Submit Monthly Regional Network Load**

**Forward Capacity Tracking System**

**Financial Assurance  
Management**

**Forward Capacity Market  
Reconfiguration Auction**

**Forward Capacity Market CSO Bilateral Contracts**

**Supplemental Availability Designation**

**Demand Resource  
Market User Interface**

**DR Audit and Testing Tool**

**Claimed Capability Auditing Tool**

**NX Application  
(NX-9, NX-12D and One-Line Diagrams)**

**Energy Efficiency Measure Database**

**Ask ISO**

**Dynamic Data Management System**

# Enroll a Passive Asset in CAMS

# Registration Timing

## New asset registrations

- Allow 7 business days for review

## Once new asset is approved

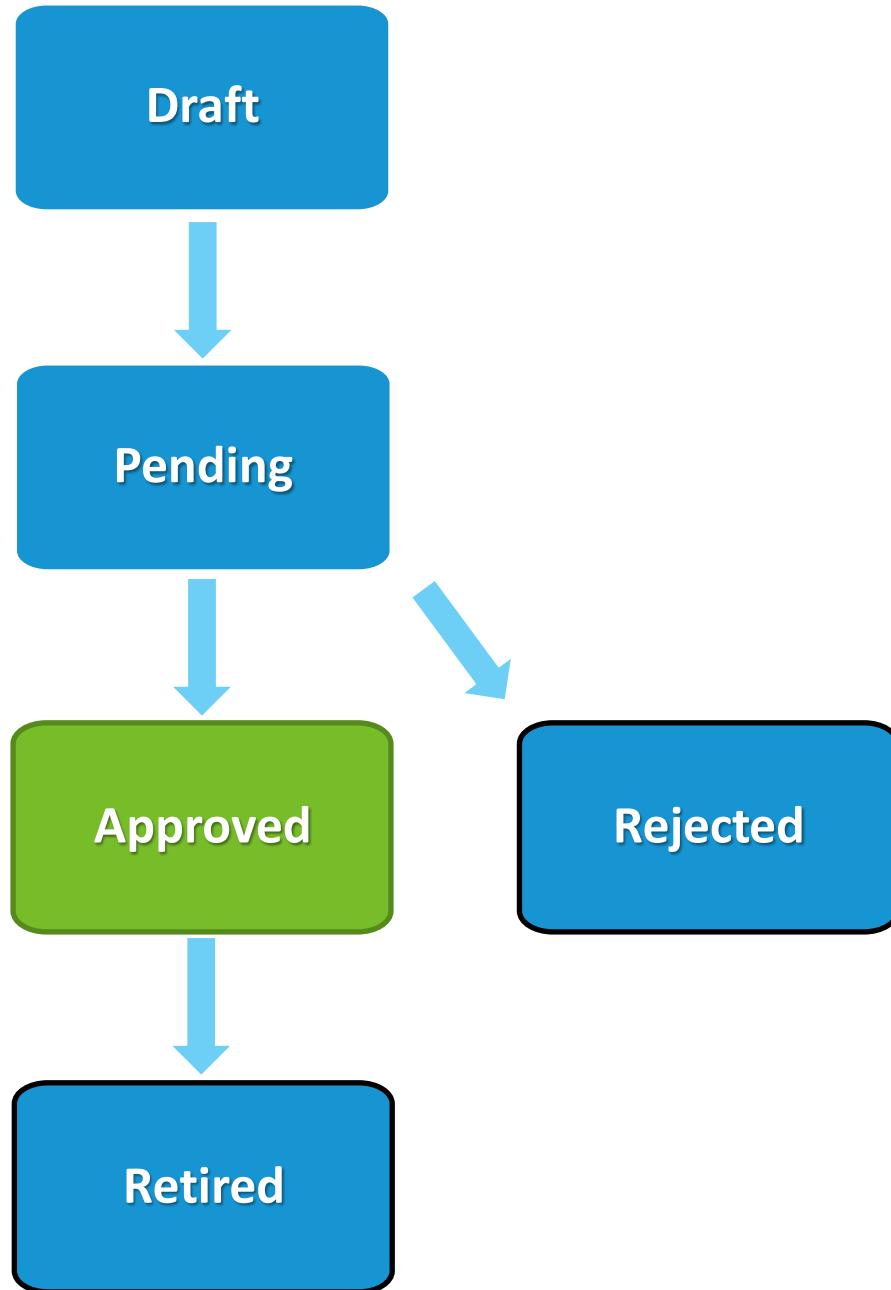
- Effective as of the next day

## Resource mapping changes

- Effective as of the first of a future month

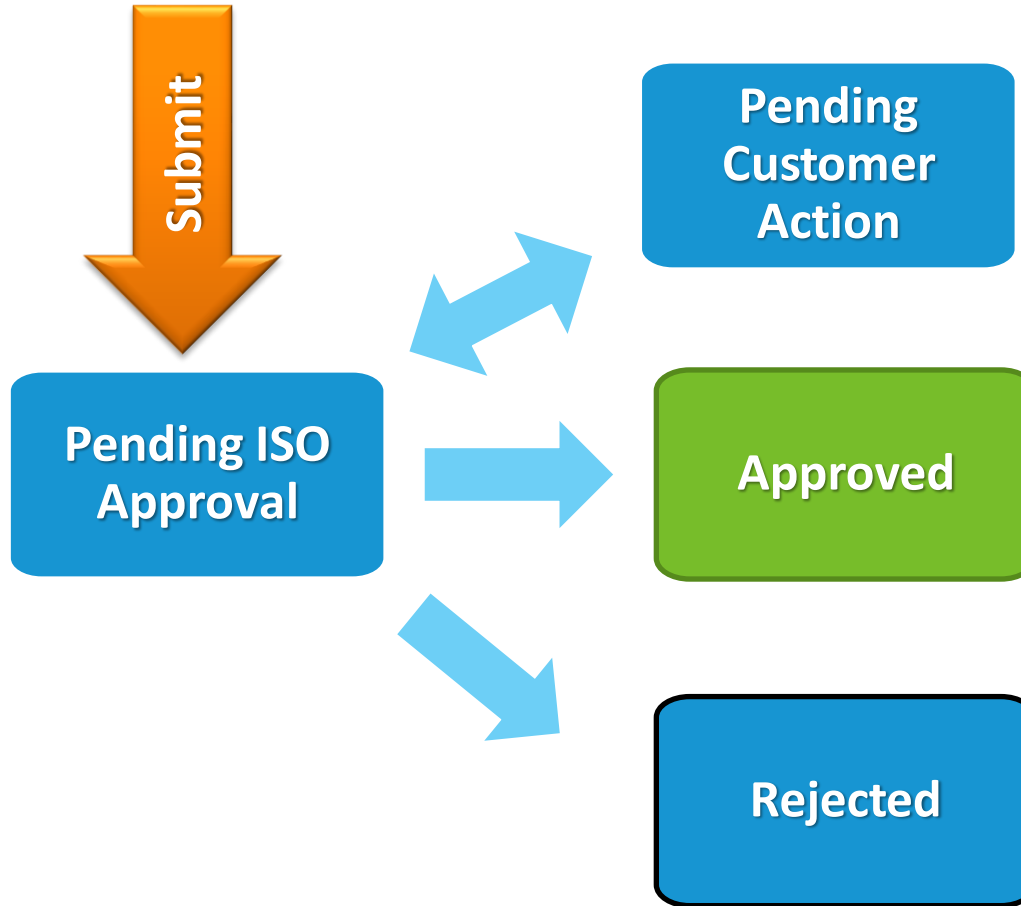


# Registration States



# Change Request States

*Created in CAMS for New Registrations and for Asset Updates*



# Generator Option: *Controllable*

If distributed generation or load management asset with a generator is both:

- Registered at the same facility as a demand response asset (DRA)  
*and*
- A controllable generator is indicated

Then 5-minute interval meter data for the controllable generator must be provided along with load data for the DRA





# CAMS Demonstration

# Entering MPVs

## Update Monthly Performance Values

Initial and Final monthly performance values entered for months prior to Jun 1, 2016 must be MWh values and Initial and Final monthly performance values entered for Jun 1, 2016 and later must be MW values.

Asset ID: 34048

Update

Month - Edit Year	Initial Value (MW/MWh)	Initial Status	Final Value (MW/MWh)	Final Status	Supporting Document
08/01/2017	6.921	Complete Pass			<a href="#">EEM Database Screenshot for Asset 34048 August Performance_09042017_090032.docx</a>
09/01/2017	6.921	Submit to ISO			<a href="#">EEM Database Screenshot for Asset 34048 September Performance_10032017_094403.docx</a>
10/01/2017					
11/01/2017					
12/01/2017					
01/01/2018					
02/01/2018					
03/01/2018					

# Entering MPVs, Continued

## Update Monthly Performance Values

Initial and Final monthly performance values entered for months prior to Jun 1, 2016 must be MWh values and Initial and Final monthly performance values entered for Jun 1, 2016 and later must be MW values.

Asset ID: 34048

Cancel

Month - Edit Year	Initial Value (MW/MWh)	Initial Status	Final Value (MW/MWh)	Final Status	Supporting Document
Aug-17	6.921	Complete Pass			<a href="#">EEM Databse Screenshot for Asset 34048 August Performance_09042017_090032.docx</a>
Sep-17	6.921	Submit to ISO			<a href="#">EEM Databse Screenshot for Asset 34048 September Performance_10032017_094403.docx</a>
Oct-17					
Nov-17					
Dec-17					
<input type="radio"/> Jan-18	<input type="text"/>	<input type="text" value="Submit to ISO"/>	<input type="text"/>	<input type="text" value="Submit to ISO"/>	<input type="text" value="Browse"/> Browse
<input type="radio"/> Feb-18	<input type="text"/>	<input type="text" value="Submit to ISO"/>	<input type="text"/>	<input type="text" value="Submit to ISO"/>	<input type="text" value="Browse"/> Browse
<input type="radio"/> Mar-18	<input type="text"/>	<input type="text" value="Submit to ISO"/>	<input type="text"/>	<input type="text" value="Submit to ISO"/>	<input type="text" value="Browse"/> Browse

Submit



# Questions?

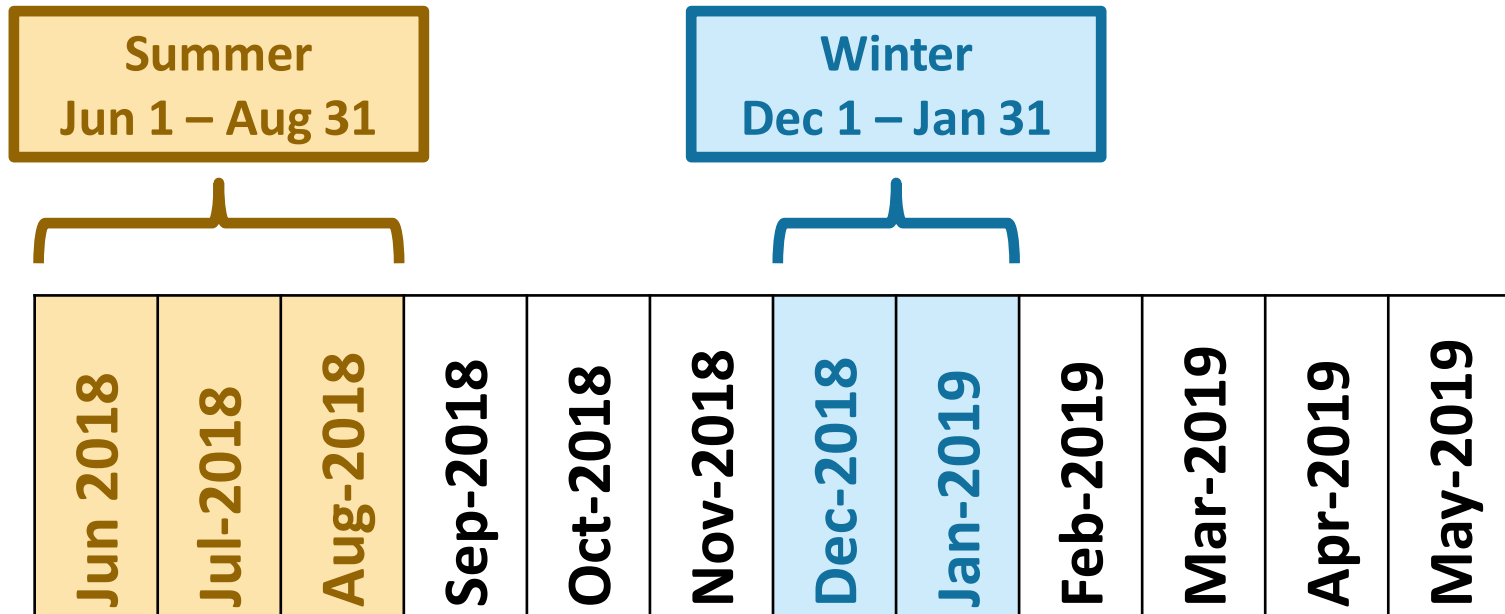
# ATT Tasks





# Audit Requirements

A **Summer** and **Winter** passive DR audit must be performed for each capacity commitment period in which the resource has a capacity supply obligation (CSO)



If a seasonal audit has not be requested by August 1 or January 1, an audit will be automatically scheduled for those dates

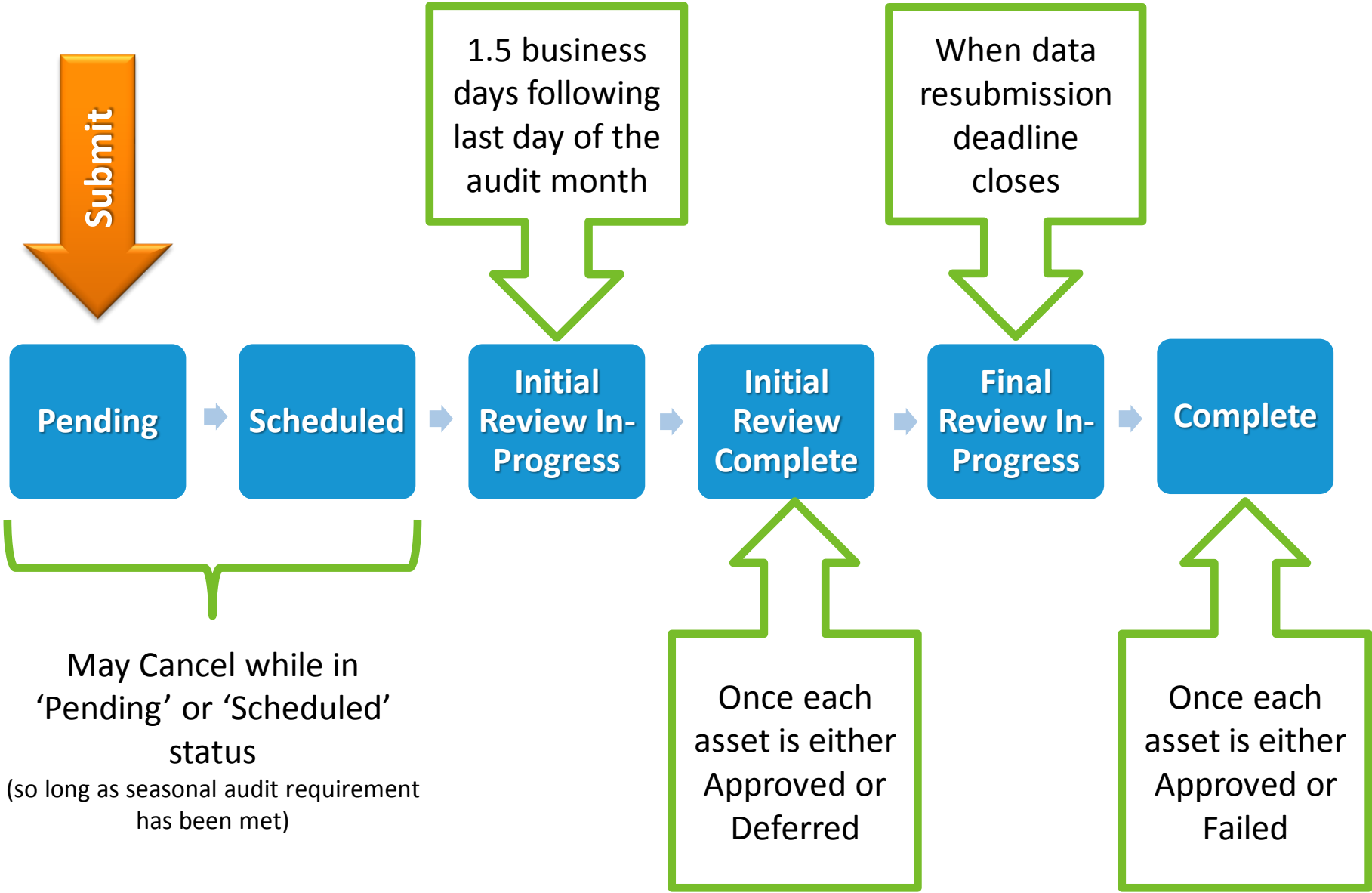
# Important Notes About Audits

- May only be requested for an on-peak or seasonal peak demand resource (not assets)
- Approved audit value is valid until end of the next like-season audit period, or next like-season audit
- Must be requested for a business day
- May be requested no more than 30 days in advance

## Please note:

- Audits will not be conducted in the month of May, 2018
  - Audit requests made in April, 2018 will be forced to select a June audit date

# ATT Audit Process Flow





# ATT Demonstration

# Data Reporting Requirements

# Data Requirements

## ISO uses the data you submit to:

- Establish seasonal passive DR audit values
- Calculate DR values during scarcity condition in PFP

# Data Submissions

## Data submissions utilized in performance calculations include

- Energy efficiency
  - MPV values reported in CAMS
  - Must match registered measure detail data in EEM
- Distributed generation & load management
  - Hourly meter data uploaded via the SMS User Interface

# Performance Hours

## On-peak resources

- Average hourly output or load reduction during on-peak hours

## Seasonal peak resources

- Average hourly output or load reduction during seasonal peak hours (or on-peak hours in shoulder months)

Demand Resource Type	Performance Hours
<b>On-Peak</b>	<ul style="list-style-type: none"><li>• H.E. 14:00-17:00 (summer)</li><li>• H.E. 18:00-19:00 (winter)</li><li>• Monday - Friday</li><li>• Non-holidays</li></ul>
<b>Seasonal Peak</b>	<ul style="list-style-type: none"><li>• <math>\geq 90\%</math> of the most recent 50/50 system peak load</li><li>• Monday - Friday</li><li>• Non-holidays</li></ul>



# Data Submittal Timeline

Initial data submittal window runs from beginning of obligation month until 13:00 on the second business day following the obligation month



# Changes to EE Data Reporting

*MPVs and EEM*

# Changes to Entering MPVs

Begin entering MPVs into the new CAMS UI as of May 1, 2018

Initial data submittals are due at 1300 on the second business day following the performance month

Continue to upload a screenshot from the EEM environment

- We will verify that this matches your entered value
- Make sure to enter the correct season's value!



For more information see the [Energy Efficiency Measure Database \(EEM\) User Guide](#), or view the recorded webinar in ISO-TEN.

# Changes to EEM Database Uploads

Measure ID is the key when uploading data in EEM

Registered before May 1, 2018

Measure ID  $\neq$  CAMS Asset ID

Registered after May 1, 2018

Measure ID = CAMS Asset ID

You can access pre-May 2018 measure IDs in CAMS

# Pay for Performance

# Passive Demand Capacity Resource Scoring

## *Pay for Performance*

**Performance will be measured for all assets mapped to on-peak and seasonal peak demand resources for a scarcity interval during on-peak or seasonal peak hours**

**Neutral score will be given for a scarcity interval outside of on peak or seasonal peak hours**

- Neither incentive nor penalty will be assessed

# Implications

In order to receive a non-zero performance score immediately following a scarcity condition:

## EE Assets (MPV Values)

- Report initial MPVs at the *beginning* of the month
- Make any corrections in the data submission window following the month

## DG/LM Assets (SMS Hourly Meter Data)

- Upload hourly interval data each day for the previous day in SMS



# Questions?



# Customer Support Information



## Ask ISO (preferred)

- Self-service interface for submitting inquiries
- Accessible through the SMD Applications Homepage
- Requires a valid digital certificate with the role of Ask ISO/External User (Contact your security administrator for assistance)

### Other Methods of Contacting Customer Support

Method	Contact Information	Availability
Email	<a href="mailto:custserv@iso-ne.com">custserv@iso-ne.com</a>	Anytime
Phone*	(413) 540-4220	Monday through Friday 8:00 a.m. to 5:00 p.m. (EST)
Pager (emergency inquiries)	(877) 226-4814	Outside of regular business hours

\* Recorded/monitored conversations