

# **RESOURCE APPENDIX: ONBOARDING OF NEW NYISO RESOURCES**

**ESR Participation**

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# Table of Contents

<b>1. NYISO’S INTERCONNECTION PROCESS .....</b>	<b>2</b>
A. . NYISO INTERCONNECTION TRAINING .....	2
B. TRANSMISSION EXPANSION AND INTERCONNECTION MANUAL .....	3
C. TRANSMISSION EXPANSION AND INTERCONNECTION GUIDE .....	3
D. NYISO TARIFF - OPEN ACCESS TRANSMISSION TARIFF (OATT) .....	3
E. HOW NEW ELECTRIC RESOURCES CONNECT TO THE GRID: AN EXPLAINER - NYISO PODCAST EP. 14 .....	4
<b>1.1 BUYER-SIDE MITIGATION .....</b>	<b>4</b>
A. NYISO TARIFF - MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST) .....	4
<b>2. NYISO CUSTOMER REGISTRATION .....</b>	<b>5</b>
A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST) .....	5
B. REFERENCE DOCUMENTATION ON NYISO CUSTOMER SUPPORT WEBPAGE .....	5
C. ENERGY STORAGE RESOURCE (ESR) PARTICIPATION MODEL E-LEARNING MODULE .....	6

**3. CREDIT..... 7**

A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES  
TARIFF (MST) ..... 7

B. CREDIT DEPARTMENT FAQ..... 7

**4. METERING CONFIGURATION & METERING FOR SETTLEMENTS..... 8**

A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES  
TARIFF (MST) ..... 8

B. REVENUE METERING REQUIREMENTS MANUAL ..... 8

C. CONTROL CENTER REQUIREMENTS MANUAL ..... 9

D. ENERGY STORAGE RESOURCE (ESR) PARTICIPATION MODEL E-LEARNING  
MODULE ..... 9

E. CO-LOCATED STORAGE RESOURCE (CSR) PARTICIPATION MODEL E-LEARNING  
MODULE ..... 10

F. ACCOUNTING & BILLING MT-304 COURSE MATERIALS..... 10

**5. MARKET MITIGATION & ANALYSIS ENERGY REFERENCES..... 11**

A. NAESB DIGITAL CERTIFICATE TUTORIAL ..... 11

B. REFERENCE LEVEL MANUAL..... 11

C. REFERENCE LEVEL SOFTWARE USER’S GUIDE ..... 11

D. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES  
TARIFF (MST) ..... 12

## **6. RESOURCE MODELING..... 13**

A. CONTROL CENTER REQUIREMENTS MANUAL .....	13
B. DIRECT COMMUNICATIONS MANUAL .....	13
C. ANCILLARY SERVICES MANUAL .....	13
D. NEW GENERATION UNITS OPERATING DURING THE START-UP TESTING PHASE	14

## **7. OUTAGE SCHEDULING..... 15**

A. NYISO TARIFF – OPEN ACCESS TRANSMISSION TARIFF (OATT) .....	15
B. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST) .....	15
C. OUTAGE SCHEDULING MANUAL .....	16
D. OUTAGE SCHEDULER USER’S GUIDE .....	16
E. MARKET PARTICIPANTS USER GUIDE.....	16
F. INSTALLED CAPACITY MANUAL .....	16
G. OUTAGE SCHEDULER TRAINING: OUTAGE SCHEDULER (OMS) SYSTEM – GENERATOR OWNER (GO) EDITION .....	17
H. OUTAGE SCHEDULER TRAINING: OUTAGE SCHEDULER (OMS) SYSTEM – TRANSMISSION OWNER (TO) EDITION .....	17

## **8. INSTALLED CAPACITY (ICAP) ENROLLMENT FOR PARTICIPATION ..... 18**

A. NYISO TARIFF - MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST).....	18
B. INSTALLED CAPACITY MANUAL .....	19
C. NEW RULES FOR ICAP MARKET PARTICIPATION - ECE AND TAM .....	19

## **9. SETTLEMENTS ..... 20**

A. ACCOUNTING AND BILLING MANUAL .....	20
B. REVENUE METERING REQUIREMENTS MANUAL .....	20
C. BUSINESS INTELLIGENCE TASK FORCE (BITF) PRESENTATIONS .....	20
D. DECISION SUPPORT SYSTEM (DSS) TRAINING.....	21
E. ENERGY STORAGE RESOURCE (ESR) PARTICIPATION MODEL E-LEARNING MODULE .....	21

## **10.ADDITIONAL RESOURCES FOR ESR ..... 22**

A. ENERGY STORAGE RESOURCE (ESR) PARTICIPATION MODEL E-LEARNING MODULE .....	22
B. ENERGY STORAGE: FREQUENTLY ASKED QUESTIONS.....	22
C. STATION POWER TRAINING MODULE .....	22
D. STATION POWER METERING, DATA AND PROGRAM REQUIREMENTS.....	23

## **11.CONTACT INFORMATION..... 24**

A. CREDIT DEPARTMENT .....	24
B. CUSTOMER REGISTRATION .....	24
C. STAKEHOLDER SERVICES.....	24

# 1. NYISO'S INTERCONNECTION PROCESS

## A. NYISO INTERCONNECTION TRAINING

Series of five eLearning chapters that encompass:

- **Chapter 1:** This module provides an overview of the purpose behind the interconnection process, addresses key terms, identifies the various stages of the interconnection process and introduces the web portal used to support the NYISO Interconnection Process.
- **Chapter 2:** This module explains the initial kick-off of an interconnection request, provides information on gaining access to the “Interconnection Projects Community” portal, identifies the steps for submitting a formal interconnection request, details the eSignature requirement, addresses the relevance of NYISO’s acknowledgement of an interconnection request, and walks through the request validation results of a submitted interconnection request.
- **Chapter 3:** This module includes the detailed steps associated with the feasibility and system reliability impact study process, a compare and contrast review of the different interconnection study options, and the detailed steps associated with the system reliability impact study.
- **Chapter 4:** This explains the purpose behind the class year study, details the components of the class year study and describes corresponding reporting requirements.
- **Chapter 5:** This module identifies supplier next steps regarding pre and post commercial responsibilities that must be completed to result in the commercial participation in NYISO’s Installed Capacity Energy and the Ancillary Services Market.

### **Navigation Path:**

NYISO Website → Training → Online Learning → NYISO Interconnection Process

## B. TRANSMISSION EXPANSION AND INTERCONNECTION MANUAL

The purpose of this Transmission Expansion and Interconnection Manual (“TEI Manual”) is to provide interested parties with a road map of the NYISO’s transmission expansion and interconnection process. The manual also describes the study criteria, guidelines, procedures, and practices used in the processes.

### Navigation Path:

NYISO Website → Manuals, Tech Bulletins & Guides → Manuals → Planning → Transmission Expansion and Interconnection Manual

## C. TRANSMISSION EXPANSION AND INTERCONNECTION GUIDE

The purpose of this guide is to provide developers with an introduction to and a high-level summary of various NYISO interconnection procedures.

### Navigation Path:

NYISO Website → Manuals, Tech Bulletins & Guides → Guides → Transmission Expansion and Interconnection Guide

## D. NYISO TARIFF – OPEN ACCESS TRANSMISSION TARIFF (OATT)

This document sets forth the provisions applicable to the transmission services provided by the ISO on an open access basis, including:

- *Attachment S, Rules to allocate responsibility for the cost of New Interconnection Studies*
- *Attachment X, Large Facility Interconnection Procedures*
- *Attachment Z, Small Facility Interconnection Procedures*

### Navigation Path:

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → OATT



## E. HOW NEW ELECTRIC RESOURCES CONNECT TO THE GRID: AN EXPLAINER – NYISO PODCAST EP. 14

It is Zach Smith’s job to prepare the New York energy grid for the future. Our Vice President of System and Resource Planning manages the team that looks at all potential reliability issues the grid could face, from a week to 10 years in the future.

### Navigation Path:

NYISO Website → About Us → Blog → Podcast Ep. 14: NYISO VP Zach Smith on Emission-Free Grid Planning, Climate Change & the Interconnection Queue

# 1.1 BUYER-SIDE MITIGATION

## A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including:

- *Attachment H, ISO Market Power Mitigation Measures*

### Navigation Path:

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

## 2. NYISO CUSTOMER REGISTRATION

### A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including:

- *Section 9, Application and Registration Procedure*
- *Attachment K, Creditworthiness Requirements for Customers*

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

### B. REFERENCE DOCUMENTATION ON NYISO CUSTOMER SUPPORT WEBPAGE

- Getting Started Guide
- Linking Certificates with MIS
- Member Community Access
- Member Community Reference Guide
- NAESB Digital Certificate Tutorial
- Power Industry Acronyms

**Navigation Path:**

NYISO Website → Support

## C. ENERGY STORAGE RESOURCE (ESR) PARTICIPATION MODEL E-LEARNING MODULE

This e-Learning module provides an overview of the Energy Storage Resources Participation model. Topics being covered include some background information leading up to this model's implementation, key information surrounding participation requirements for ESRs in the energy, ancillary services, and installed capacity markets, and important ESR mitigation measures.

### **Navigation Path:**

NYISO Website → Training → Online Learning → Energy Storage Resources Participation Model

# 3. CREDIT

## A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including:

- *Attachment K, Creditworthiness Requirements for Customers*

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

## B. CREDIT DEPARTMENT FAQ

The NYISO Credit FAQ Document covers the following topics:

- Collateral
- Cash Deposits
- Letter of Credit
- Surety Bonds
- Credit Management System (CMS)
- Annual/Periodic Submissions
- New Applicants – Items needed for Credit Approval

**Navigation Path:**

NYISO Website → Support → Budget & Finance → NYISO Credit → NYISO Credit FAQ

# 4. METERING CONFIGURATION & METERING FOR SETTLEMENTS

## A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including:

- *Section 13, Metering*

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST → Metering 13.2.4

## B. REVENUE METERING REQUIREMENTS MANUAL

The material in this manual defines the standards for the revenue metering systems required for conducting accurate financial settlements of the New York Independent System Operator, Inc. (NYISO) – administered wholesale electric energy markets. Additionally, it defines the responsibilities for Meter Authorities (MA) and describes the processes for data processing, analysis, and dispute resolution.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Revenue Metering Requirements

## C. CONTROL CENTER REQUIREMENTS MANUAL

This Manual focuses on the computer, communications, and metering systems required for reliable and economic operations of the New York Independent System Operator (NYISO).

- Computer Systems
- Metering Policy and Certification
- Voice Communications

### **Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals  
→ Administrative → Control Center Requirements

## D. ENERGY STORAGE RESOURCE (ESR) PARTICIPATION MODEL E-LEARNING MODULE

This e-Learning module provides an overview of the Energy Storage Resource Participation model. Topics being covered include some background information leading up to this model's implementation, key information surrounding participation requirements for ESRs in the Energy, Ancillary Services, and Installed Capacity Markets, and important ESR mitigation measures.

### **Navigation Path:**

NYISO Website → Training → Online Learning → Energy Storage Resources Participation Model

## E. CO-LOCATED STORAGE RESOURCES (CSR) PARTICIPATION MODEL E-LEARNING MODULE

This e-Learning module provides an overview of the Co-located Storage Resources participation model. Topics being covered in this presentation include salient and distinguishing features of how Energy Storage Resources and Wind or Solar Intermittent Power Resources can participate as CSRs in NYISO's Energy, Ancillary Services and Installed Capacity markets, and Energy market settlements.

### **Navigation Path:**

NYISO Website → Training → Online Learning → Co-located Storage Resources Participation Model

## F. ACCOUNTING & BILLING MT-304 COURSE MATERIALS

This course provides detailed knowledge of the settlements associated with Power Suppliers, Load Serving Entities, Transactions, Virtual Trading, Demand Response and Transmission Owners.

- Metering Fundamentals
- Settlements Reports Overview

### **Navigation Path:**

NYISO Website → Training → Course Materials & Infographics → Training Course Materials → Accounting & Billing MT-304

# 5. MARKET MITIGATION & ANALYSIS ENERGY REFERENCES

## A. NAESB DIGITAL CERTIFICATE TUTORIAL

This e-Learning module is geared toward guiding Market Participants (MPs) on how to obtain and implement the use of a digital certificate to access NYISO markets and applications.

**Navigation Path:**

NYISO Website → Training → Online Learning → NAESB Digital Certificate Tutorial

## B. REFERENCE LEVEL MANUAL

This manual provides an overview of the NYISO's Reference Level Processes and details various timelines that apply to the submission, review, approval, and update of cost-based data and to mitigation consultations.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Operations → Reference Level Manual

## C. REFERENCE LEVEL SOFTWARE USER'S GUIDE

This user guide is intended for Market Participants (MPs) who are users of the NYISO Reference Level Software (RLS) application.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides → Reference Level Software User's Guide



## D. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including related services.

- *Attachment H, ISO Market Power Mitigation Measures*

### **Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

# 6. RESOURCE MODELING

## A. CONTROL CENTER REQUIREMENTS MANUAL

This Manual focuses on the computer, communications, and metering systems required for reliable and economic operations of the New York Independent System Operator (NYISO).

- Computer Systems
- Metering Policy and Certification
- Voice Communications

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Control Center Requirements

## B. DIRECT COMMUNICATIONS MANUAL

The Direct Communications Procedure describes the facilities available to generation owners, Demand Side Resources, Limited Energy Storage Resources, and other suppliers that provide energy and ancillary services to the NYISO markets; outlines the Initial Installation Procedure; and documents Operational Procedures for communications facilities.

- The Direct Communications Procedure is a secured document not available on the NYISO website. To request authorization to receive the Direct Communications Procedure, please contact **Stakeholder\_services@nyiso.com**

## C. ANCILLARY SERVICES MANUAL

The purpose of this Manual is to provide an overview of the Ancillary Services available in the New York market along with settlement process associated with each of the available ancillary services.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals  
→ Operations → Ancillary Services Manual

## D. NEW GENERATION UNITS OPERATING DURING THE START-UP TESTING PHASE

This Technical Bulletin describes procedures for new generating units to operate in testing mode prior to commercial operation.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Technical  
Bulletins → TB 116 – New Generation Units Operating During the Start-Up  
Testing Phase

# 7. OUTAGE SCHEDULING

## A. NYISO TARIFF – OPEN ACCESS TRANSMISSION TARIFF (OATT)

This document sets forth the provisions applicable to the transmission services provided by the ISO on an open access basis, including:

- *Section 9.6, Outages and Interruptions*
- *Section 35.9, Coordination of Scheduled Outages*

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → OATT

## B. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including:

- *Section 5.18, Generator Outages and Generator Obligations While in These Outages*

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

## C. OUTAGE SCHEDULING MANUAL

This Outage Scheduling Manual is intended for the New York Independent System Operator (NYISO) staff and those entities who are responsible for notifying the NYISO of planned and unexpected changes to the operational availability of their transmission and generating facilities.

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Outage Scheduling Manual

## D. OUTAGE SCHEDULER USER'S GUIDE

This user guide is intended for Market Participants (MPs) and Transmission Owners (TOs) who are users of the NYISO Outage Scheduler (OMS) System.

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides → Outage Scheduler User's Guide

## E. MARKET PARTICIPANTS USER GUIDE

This Guide provides Market Participants with the information needed to participate in New York Independent System Operator (NYISO) Energy Markets.

- *Section 7.4, Generator and Ancillary Services Bids*

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides → Market Participant User's Guide

## F. INSTALLED CAPACITY MANUAL

The Installed Capacity Manual contains the procedures that will be followed by the NYISO, and its Customers regarding the Installed Capacity markets and auctions administered by the NYISO pursuant to the NYISO Market Administration and Control Area Services Tariff (Services Tariff).

- *Section 4.3, Maintenance Scheduling Requirements*

- *Section 4.8, Bidding, Scheduling, and Notification Requirements*
- *Attachment K, Reportable Operating Data*

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals  
→ Operations → Installed Capacity Manual

## G. OUTAGE SCHEDULER TRAINING: OUTAGE SCHEDULER (OMS) SYSTEM – GENERATOR OWNER (GO) EDITION

This e-Learning module provides a walk-through of the Outage Scheduler (OMS) System for Generator Owners. Topics covered include accessing and logging into the OMS System, environment navigation, creating a new outage request (Generation O.R.E.), tracking a request, as well as modifying a request.

**Navigation Path:**

NYISO Website → Training → Online Learning → Outage Scheduler (OMS)  
System → Generator Owner (GO) Edition

## H. OUTAGE SCHEDULER TRAINING: OUTAGE SCHEDULER (OMS) SYSTEM – TRANSMISSION OWNER (TO) EDITION

This e-Learning module provides a walk-through of the Outage Scheduler (OMS) System for Transmission Owners. Topics covered include accessing and logging into the OMS System, environment navigation, accessing the conflict calendar, creating a new outage request (Transmission O.R.E.), tracking a request, as well as modifying a request.

**Navigation Path:**

NYISO Website → Training → Online Learning → Outage Scheduler (OMS)  
System → Transmission Owner (TO) Edition

# 8. INSTALLED CAPACITY (ICAP) ENROLLMENT FOR PARTICIPATION

## A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including:

- *Section 5.12, Requirements Applicable to Installed Capacity Suppliers*

### Navigation Path:

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

## B. INSTALLED CAPACITY MANUAL

The Installed Capacity Manual contains the procedures that will be followed by the NYISO, and its Customers regarding the Installed Capacity markets and auctions administered by the NYISO pursuant to the NYISO Market Administration and Control Area Services Tariff (Services Tariff).

- *Attachment D, Dependable Maximum Net Capability (DMNC)*
- *Attachment F, Intent to Offer Letter*

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Operations → Installed Capacity Manual

## C. NEW RULES FOR ICAP MARKET PARTICIPATION - ECE AND TAM

This presentation will provide an overview of changes to the NYISO's Capacity Market due to the implementation of Expanding Capacity Eligibility (ECE), and Tailored Availability Metric (TAM).

**Navigation Path:**

NYISO Website → Training → Course Materials → Installed Capacity → New Rules for ICAP Market Participation - ECE and TAM



# 9. SETTLEMENTS

## A. ACCOUNTING AND BILLING MANUAL

This document focuses on the settlement, invoicing and clearing processes for wholesale market transactions encompassing the NYISO-administered Energy, Transmission Service, and Ancillary Services markets.

- *Section 1, Settlement and Invoicing Process*
- *Section 2, Market Participant Responsibilities and Controls*

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Accounting and Billing

## B. REVENUE METERING REQUIREMENTS MANUAL

This document focuses on meter configuration requirements for NYISO resources.

- *Section 3.2.2, Meter Configuration for Energy Storage Resources*

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Revenue Metering Requirements

## C. BUSINESS INTELLIGENCE TASK FORCE (BITF) PRESENTATIONS

BITF is a forum for stakeholders to exchange information pertaining to NYISO software enhancements and associated software training courses.

**Navigation Path:**

NYISO Website → Committees → Business Issues Committee → Business Intelligence Task Force

## D. DECISION SUPPORT SYSTEM (DSS) TRAINING

Series of four eLearning modules that encompass:

- **Session 1:** This e-Learning module explains the purpose and benefits behind DSS, identifies reports available, and explains how to access it.
- **Session 2:** This e-Learning module steps through logging into DSS, the DSS homepage options, resources within DSS, and DSS data versioning.
- **Session 3:** This e-Learning module demonstrates how to access DSS corporate reports, utilize Automated Data Delivery Files, and identified supporting documentation.
- **Session 4:** This e-Learning module explains the organization of DSS Data and teaches basic custom query building.

**Navigation Path:**

NYISO Website → Training → Online Learning → DSS

## E. ENERGY STORAGE RESOURCE (ESR) PARTICIPATION MODEL E-LEARNING MODULE

This e-Learning module provides an overview of the Energy Storage Resources Participation model. Topics being covered include some background information leading up to this model's implementation, key information surrounding participation requirements for ESRs in the energy, ancillary services, and installed capacity markets, and important ESR mitigation measures.

**Navigation Path:**

NYISO Website → Training → Online Learning → Energy Storage Resources Participation Model

# 10. ADDITIONAL RESOURCES FOR ESR

## A. ENERGY STORAGE RESOURCE (ESR) PARTICIPATION MODEL E-LEARNING MODULE

This e-Learning module provides an overview of the Energy Storage Resources Participation model. Topics being covered include some background information leading up to this model's implementation, key information surrounding participation requirements for ESRs in the Energy, Ancillary Services, and Installed Capacity Markets, and important ESR mitigation measures.

**Navigation Path:**

NYISO Website → Training → Online Learning → Energy Storage Resources Participation Model

## B. ENERGY STORAGE: FREQUENTLY ASKED QUESTIONS

The use of Energy Storage Resources (ESRs) on the grid is growing in New York State. It has the potential to enhance energy production from clean energy resources while supporting improved grid efficiency and resilience.

**Navigation Path:**

NYISO Website → About Us → Blog → Energy Storage: Frequently Asked Questions

## C. STATION POWER TRAINING MODULE

This intermediate level e-Learning module explains the function of Station Power, various types of Station Power, requirements for Station Power, as well as the registration process for participation in the Station Power Program.

**Navigation Path:**

NYISO Website → Training → Online Learning → Station Power

## D. STATION POWER METERING, DATA, AND PROGRAM REQUIREMENTS

Generators wishing to participate in the NYISO's Station Power program have specific registration, data modeling, and metering requirements that are outlined in this Technical Bulletin.

### **Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Technical Bulletins → TB-117 Station Power Metering, Data and Program Requirements

# 11. CONTACT INFORMATION

## A. CREDIT DEPARTMENT

Contact: [credit\\_department@nyiso.com](mailto:credit_department@nyiso.com)

## B. CUSTOMER REGISTRATION

Contact: [customer\\_registration@nyiso.com](mailto:customer_registration@nyiso.com)

## C. STAKEHOLDER SERVICES

Contact: [stakeholder\\_services@nyiso.com](mailto:stakeholder_services@nyiso.com)