

# Co-Located Storage Resource (CSR) Market Trial

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# Agenda

- **Brief Overview of project**
- **Who should participate in market trial?**
- **Registration Information**
- **Schedule for trial**
- **Metering Information**
- **CSI Functionality**
- **Q & A**

# Project Overview

- **CSR definition: A wind or solar Intermittent Power Resource and an Energy Storage Resource that (A) are both located behind a single Point of Injection (POI); (B) participate in the ISO Administered Markets as two distinct Generators; and (C) share a set of CSR Scheduling Limits. Resources that serve a Host Load may not participate in the ISO- administered Markets as components of a CSR.**
- **Each unit within a CSR will have a distinct PTID/Schedule/Settlement.**
- **All units within a CSR will be settled at the LBMP at the POI.**
- **Metering will be reported on the POI, not the individual units.**
- **NYISO requires telemetry data from each of the CSR Generators (the ESR and the IPR). The telemetry data will be used by NYISO to allocate the hourly revenue grade meter data from the POI to every RTD interval of the hour and between the two CSR Generators.**

# Who should participate in trial?

- All users who currently access the Marketplace Login, Marketplace Upload/Download, Settlement Data Exchange (SDX) Upload/Download and Customer Settlements Interface (CSI) are encouraged to participate.

# Registration

- Registration for the market trial opened on June 30, 2021 and will continue through August 2021.
- Please email NYISO Stakeholder Services at [stakeholder\\_services@nyiso.com](mailto:stakeholder_services@nyiso.com) with the subject: “Co-Located Storage Resource (CSR) Model – Market Trials Testing” to register as a participant for Market Trial Testing. Please provide the following information when doing so:
  - First and Last name
  - Contact Phone Number
  - Email Address
  - MIS User ID ( BE SURE NOT TO INCLUDE PASSWORD)
  - Organization Affiliation
  - NYISO Application(s) you plan to test
  - Approximate Date or Timeframe you will be testing
- Once you have registered, a NYISO Stakeholder Services Representative will email you the URLs for each application in the test environment along with additional technical information.

# Schedule for Trial

- **9/7/2021 – 9/17/2021: 9:00 a.m. – 4:00 p.m. EDT – Market Trial execution for Marketplace Login, Settlement Data Exchange (SDX) Upload/Download and Customer Settlements Interface (CSI)**

# Metering Information

- Hourly revenue grade meter data will only be submitted for the CSR POI. **IMPORTANT** – revenue grade metering cannot be submitted for the individual units when they are operating as a member generator of a CSR POI.
- Data will be submitted for MA Reported Injection MWh and MA Reported Withdrawal MWh; MA Reported MWh is calculated through system and is not an editable field for a CSR POI.

# Metering Information Continued.....

- You will use the Dual Channel Templates when using SDX to submit meter data for the CSR POI.
- Refer to Section 2.12 of the Settlement Data Applications User's Guide for more information regarding the templates.



# Customer Settlements Interface (CSI)

- **“Include Group or CSR Members”** – additional search query that has been added. That indicator, when selected, will return all Group or CSR Members when only an individual group or CSR POI Generator is selected or when a member of a Group or CSR POI Generator is selected.
- **Default Sort Display:** The default sort order of the records returned based on the applicable search query allows the Group Unit PTID and CSR POI PTID to appear in the display with their corresponding member Generators listed directly below.
- **Subzone Load Detail:** Only the CSR POI should have a non-zero Gen/Tie Total (MWh), while the member generators will have 0 MWh to avoid double counting. Only the value shown for the CSR POI will be included in the hourly Gen Total and Gen/Tie Total at the bottom of the table.
- ESR/IPR units, when a member of a CSR POI, will be excluded from functionality applicable to submitting single channel meter data.

# CSI Updated View/Functions

The screenshot displays the 'Customer Settlements Interface' for 'Gen/Tie Detail'. The interface includes a navigation bar with links like 'Unsolidated Invoice', 'Daily Reconciliation', and 'Rate Schedule One'. Below this, there are filters for 'Start Date' (06/28/2021 00 EDT) and 'End Date' (06/28/2021 23 EDT). A red arrow points to the 'Include Group or CSR Members' checkbox, which is checked. The 'Type' section has radio buttons for 'All', 'Generators', and 'Ties', with 'All' selected. The 'Sort By' section has radio buttons for 'PTID' and 'Name', with 'PTID' selected. A legend at the top of the table indicates filters: '≥ 5% and < 10% Anomaly', '≥ 10% Anomaly', and 'Null PTS Value Anomaly'. The table has columns for 'Time', 'Pid', 'Pid Name', 'Type', 'MA Reported MWh', 'ISO PTS Avg Actual MWh', 'MA Reported Injection MWh', 'ISO PTS Avg Actual Injection...', 'MA Reported Withdrawal M...', 'ISO PTS Avg Actual Withdrawal M...', 'Last Updated', and 'Last Update User'. The table is divided into two sections by date/time: '06/28/2021 00:00:00 EDT' and '06/28/2021 01:00:00 EDT'. In the first section, there are 10 rows of data. In the second section, there are 10 rows of data. The 'MA Reported Injection MWh' and 'MA Reported Withdrawal M...' columns are circled in red. The 'Last Updated' and 'Last Update User' columns are also circled in red.

| Time                               | Pid                 | Pid Name | Type | MA Reported MWh | ISO PTS Avg Actual MWh | MA Reported Injection MWh | ISO PTS Avg Actual Injection... | MA Reported Withdrawal M... | ISO PTS Avg Actual Withdrawal M... | Last Updated | Last Update User |
|------------------------------------|---------------------|----------|------|-----------------|------------------------|---------------------------|---------------------------------|-----------------------------|------------------------------------|--------------|------------------|
| Date/Time: 06/28/2021 00:00:00 EDT |                     |          |      |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 00:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| Date/Time: 06/28/2021 01:00:00 EDT |                     |          |      |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |
| *                                  | 06/28/2021 01:00:00 |          | GEN  |                 |                        |                           |                                 |                             |                                    |              |                  |

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- Maintaining and enhancing regional reliability
- Operating open, fair and competitive wholesale electricity markets
- Planning the power system for the future
- Providing factual information to policymakers, stakeholders and investors in the power system



# Questions?