

Emergency Demand Response Program

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Subject Matter Expert: Mitchell Braun Associate Distributed Resources Operations Engineer

Reliability-Based Demand Response

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SME Bio



Mitchell Braun Associate Distributed Resources Operations Engineer



Mitchell Braun joined the NYISO in 2020 as a Market Structures Co-Op/Intern within the New Resource Integration team. In this role, he worked extensively with the Gurobi Optimization Engine to begin formulating a model to forecast the impacts of increased renewable penetration and electrification on New York's grid infrastructure. Currently, Mitch is a Market Operations Associate Engineer within the Distributed Resources Operations team. As a member of the Distributed Resources Operations team, he helps facilitate the NYISO's Demand Response Markets, as well as aid in the development of the Distributed Energy Resources Participation Model.

Prior to joining the NYISO, Mitch spent four years at a pool installation company servicing inground pool pumps, gas and electric heaters, and automated regulation systems across New York.

Mitch has a Bachelor's in Physics from Siena College, as well as a Master's in Electrical Engineering from Clarkson University.



Session Objectives

- Define the purpose of Emergency Demand Response Program (EDRP)
- Identify program eligibility requirements
- Summarize the process for enrollment
- Define and explain how Customer Baseline Load (CBL) is calculated
- Describe the method for measuring and reporting performance
- Explain the event notification process and customer response to an event
- Describe the reporting process for Event Response details
- Describe verification process for CBL after an event
- Describe settlement for an EDRP Event Response

Topic 1: Purpose of Emergency Demand Response Program



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Emergency Demand Response Program

- Part of NYISO's reliability-based Demand Response programs
- Load reduction through interruptible loads, or loads with a qualified behind-the-meter Local Generator, or both
- Load reduction during a reliability event is <u>voluntary</u>
- Enrolled by Curtailment Service Providers (CSP)
 - Serves as interface between the NYISO and resource



Purpose - Emergency Demand Response Program

<u>Purpose</u>: Provide load reductions in response to NYISO instructions for a discrete period of time, to supplement generation when Operating Reserves are forecast to be short or when there is an actual Operating Reserve Deficiency or other system emergency

Operating Reserves



- Generation and/or Demand Response available to supply Energy or reduce demand in the event of a real time power system Contingency
 - Operating Reserves must be available from Generators or Demand Side Resources located within the NYCA and within specific regions in order to respond adequately to contingencies
- The NYCA's total Operating Reserve must be greater than or equal to 1¹/₂ times the single largest contingency (in MW)
- NYISO procures 2620 MW of Operating Reserves every operating day
 - 2620 MW = 2 x single largest contingency (1310 MW)

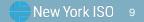
2620 MW NYCA Operating Reserves

Operating Reserve Shortage



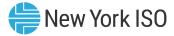
- Failure to maintain the minimum Operating Reserves requirement in the day-ahead forecast or in real time (in-day)
 - As defined in the NYISO Emergency Operations Manual
 - Determined NYCA wide as well as at a locational level
- NYISO calls for activation of EDRP resources either NYCA wide or at a zonal level to provide load reduction

Topic 2: EDRP eligibility requirements



Eligibility Criteria – Curtailment Service^{w York ISO} Providers

- For EDRP, wholesale electricity market participants called the Curtailment Service Providers (CSPs) enroll retail end users who provide load reduction
- Four classes of CSPs
 - 1. Load Serving Entities (LSEs)
 - Currently serving retail end-users capable of load reduction, or
 - Enrolls another LSE's load solely for participating in EDRP
 - 2. Individual retail customers enrolled who take service directly from the NYISO to supply its Load in NYCA
 - 3. NYISO approved Curtailment Customer Aggregators of retail end users capable of Load Reduction
 - Aggregators can join NYISO as a NYISO Limited Customer
 - 4. NYISO approved Curtailment Program End Use Customers (EUC), end use customers whose Load is normally served by an LSE but who participate directly with the NYISO solely for purposes of EDRP.
 - An EUC must join the NYISO as a NYISO Limited Customer



Minimum Qualifications for CSPs

To serve as a CSP, an entity must:

- Be a NYISO Customer, or a NYISO Limited Customer
- Be able to cause a Load Reduction from the NYS Transmission System and/or local distribution system at direction of NYISO
- Be capable of reducing a minimum of 100 kW of NYCA Load in a single Load Zone
- Be capable of responding within two hours of notice from the NYISO
- Follow enrollment procedures defined in the EDRP manual
- Comply with metering requirements set forth by NYISO and provide hourly interval metering data to validate performance

Eligibility Requirements – Individual ^{Resources}

- Individual Demand Side Resources can enroll in either EDRP or the SCR program-, but not both
- Individual Demand Side Resources cannot enroll the same metered load with more than one CSP
- Local Generators that operate to fully serve their Load do not qualify for EDRP
- Demand Side Resources using a Local Generator to provide load relief through EDRP are subject to all applicable environmental rules and regulations
 - Demand Side Resources not complying with environmental requirements will not be permitted to participate in the EDRP



Metering Requirements

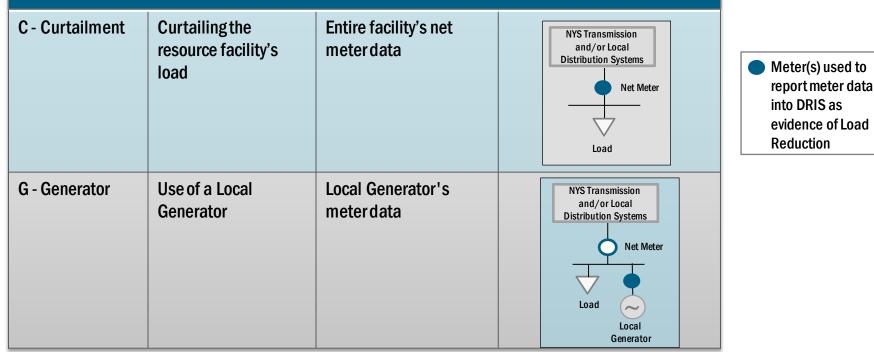
- Registered EDRP resources typically require an hourly interval billing meter to report event data and measure performance
- Interval metering devices could be
 - Hourly Revenue-grade, or
 - Non-revenue-grade meters that meet the ±2% accuracy threshold
- Resources that use alternate non-interval meter based metering standards to measure performance may participate in EDRP through the Small Customer Aggregation (SCA) program



Metering Configuration Requirements

- A CSP must identify a "Response Type" for each EDRP resource it enrolls in DRIS based on
 - (i) How the EDRP resource reduces its load during an event, and
 - (ii) The meter configuration of the EDRP resource's facility

Metering Configuration Requirements New York ISO Meter Configuration for Measurement of Type of Load **Response** Type Load Reduction Reduction



Reduction

Metering Configuration Requirements New York ISO

Response Type	Type of Load Reduction	Meter Configuratio Load I		
B- Both	(i) Curtailment and use of a Local Generator (ii) Use of a Local generator	 (a) Entire facility's net meter data, or (b) Net of entire facility's Load meter data and Local Generator's meter data (a) Entire facility's net meter data, or (b) Net of entire facility's Load meter data and Local Generator's meter data 	NYS Transmission and/or Local Distribution Systems Load Local Generator NYS Transmission and/or Local Distribution Systems Net Meter or Net of the Load and Local Gen Meter	Meter(s) used to report meter data into DRIS as evidence of Load Reduction

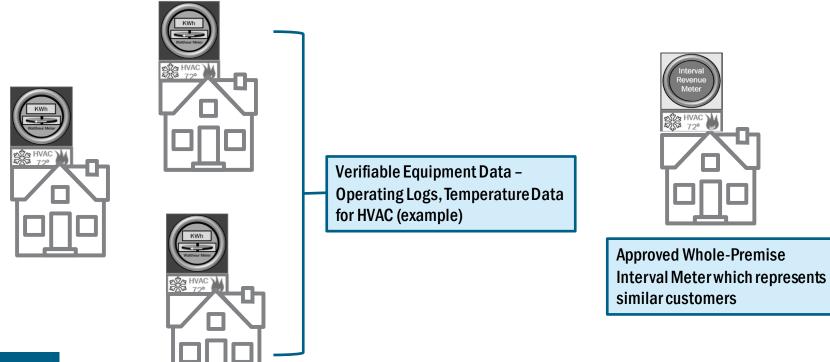
Small Customer Aggregations (SCA)

- The Small Customer Aggregation program allows Demand Side Resources to participate in EDRP using alternate non-interval meter based metering and performance measurement standards
 - NYISO review and approval required
- Small customer aggregations must be at least 0.5 MW per load zone
- Approval process includes the development, and NYISO approval of, a data sampling plan or measurement methodology that assigns an initial estimate of response per site in order to drive the sample size

SCA – Performance Measurement ^{® New York ISO} Methods

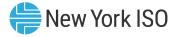
- **Proposals for measuring SCA performance can involve:**
 - Approved whole-premises kW metering devices on a sample of resources
 - Approved end-use devices or process kW metering devices on a sample of resources
 - Provision for supplying verifiable behavioral actions, equipment operating logs, or other data that is deemed to be sufficient, indicating the load level the customer would have otherwise consumed, but for the EDRP event participation
 - Other measurements systems that indicate load level the customer otherwise would have consumed, but for the EDRP event participation

SCA – Alternate Methods for Performance Measurement



For Illustration Only





SCA – NYISO Review and Approval Process

- Each initial proposal or significant revision for SCAs will be reviewed by NYISO and the Price Responsive Load Working Group
- Must be approved by a majority of the Chairs and Vice-Chairs of the Management Committee and Business Issues Committee and the Chairman of the Price Responsive Load Working Group
- The Small Customer Aggregator is responsible for all costs associated with developing and administering the alternate performance methodology

Topic 3: Process for enrollment





Enrollment Process - Overview

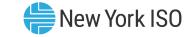
- Demand Side Resources must be enrolled for participation in EDRP through the NYISO Demand Response Information System (DRIS) by the Curtailment Service provider (CSP)
- Before the CSP can enroll EDRP Resources in DRIS:
 - CSP must be registered in the NYISO MIS as eligible to participate in EDRP and reflect a Qualified MIS status in DRIS
 - To register as a Curtailment Service Provider (CSP), the organization must be
 - $-\,$ A NYISO Customer, or
 - A NYISO Limited Customer
- List of documents required for a CSP to complete the NYISO registration process found in the Member Relations Application to Register, Annex RR

EDRP Resource Enrollment in DRIS

- CSPs must set up and assign one or more Admin Contacts, and one or more Event-Responder Contacts in DRIS before individual resources can be enrolled
- CSPs must obtain authorization from each EDRP Resource in order to enroll the resource in the EDRP
 - CSP ensures compatibility with other Demand Response programs before enrolling resources

New York ISO

EDRP Resource Enrollment in DRIS



- The CSP enrolls resources every Capability Period in accordance with the applicable time frame for resource open enrollment provided in the DRIS Event calendar
 - Summer Capability Period
 - May through October
 - Winter Capability Period
 - November through April
- Any changes to enrollment information can be made during the monthly open enrollment period, such as separating a resource from a CSP's portfolio
- Resources must be re-enrolled in DRIS every capability period for participation in EDRP

EDRP Enrollment-DRIS Event Calendar

-1	SY	EW YORK IDEPENDENT STEM OPERATOR rgy Markets Of Tomorrow	Errort Co	Demand Response Information System Event Calendar						
Main					ables • Notification •	DSASP - B	TM •			
	m: 01/14/202	2 🖸 To: 03/3	21/2022 🕑 × Displa	IV						
Events Category	Auction Mon	th Start Date	End Date	Start Message		End 1	Message			



EDRP Enrollment in DRIS

- Resource enrollment data can be imported into DRIS as either a .csv or an .xls file
- Information required for enrolling a resource in DRIS include:
 - Resource ID (assigned by the NYISO)
 - Resource name
 - TO account number (assigned by the transmission owner)
 - Load Zone where resource is located
 - Transmission owner Abbreviation
 - Address
 - Generator Type (for resources that are Response Type G and B) (optional)
 - Generator Name Plate Rating (for resources that are Response Type G and B) (optional)



EDRP Enrollment in DRIS

- CBL method
 - A for Average day
 - W for Weather Sensitive
- Response Type (C,G or B)*
- Subscribed Load (Curtailment Declared Value in kW/h)
- Subscribed Gen (Generation Declared Value in kW/h)

	A	В	С	D	E	F	G	Н		J	K	L	М	N	0	Р
1	Effective Date)=														
2	Program=EDI	RP&														
												Generator				
			TO		Transmission							Name				
		Resource	Account		Owner					Zip	Generator	Plate	CBL	Response	Subscribed	Subscribed
3	Resource ID	Name	Num	Zone	Abbreviation	Street	Street 2	City	State	Code	Type ID	Rating	Method	Туре	Load	Gen

* CSPs enrolling a Response Type G or B resource must certify that the Local Generator complies with all federal, state, and local laws and regulatory requirements with respect to the operation of the Local Generator, and must provide documentation of compliance upon request of the NYISO

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EDRP Enrollment Status

- Status categories displayed for EDRP resources once the enrollment period closes:
 - Approved
 - Resource is enrolled by NYISO
 - Separated
 - When resource is no longer part of the CSP's portfolio
 - Resource can be separated by the CSP or NYISO
 - Once separated, the resource cannot participate unless it is re-enrolled by the same or a different CSP, via an import file
 - Denied



EDRP Enrollment Status

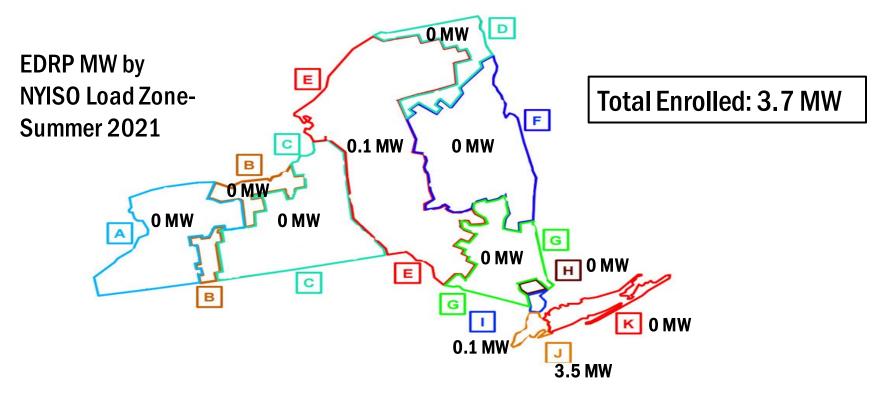
- Pending/Under Review
 - When resource enrollment is pending validation by NYISO
 - Resources are placed in this status automatically by DRIS if the information in any of the Monitored fields has changed from the last enrollment period to the current

Fields Monitored for both SCR and EDRP Enrollments
Zone
Transmission Owner
Transmission Owner Account Number
Resource Facility Street
Resource City
Resource Zip Code
Response Type*

- Once NYISO requested documentation has been received and reviewed, the resource status could be changed by the NYISO to approved or denied
- If denied, the CSP can re-enroll the resource in the following month's enrollment open period or the same month if the open enrollment period has not ended



EDRP Enrollment – Summer 2021

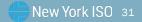


As reported in NYISO 2021 Annual Report on Demand Response Programs

Topic 4: Customer Baseline Load calculation



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Customer Baseline Load (CBL)

- Customer Baseline Load (CBL)
 - Baseline used for EDRP resources, also used for DADRP resources and SCR energy calculations to calculate energy response during a demand Response event/test
 - Reference period used: Highest five consumption days of last ten "like" days where DR event or schedule did not occur
- CBL Calculation and Response Type:
 - Response type B and C: Load supported by any behind the meter Local Generator or supply source, is not included in the metered Load used to calculate resource CBL
 - Response type G: Base-load portion of generation is excluded from actual performance of generator used in CBL calculation



Selecting a CBL method

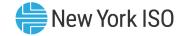
- CBL method:
 - A for Average day
 - W for Weather adjusted
- The CSP selects the CBL formula when it enrolls a resource with the NYISO in the EDRP
 - The choice of CBL becomes effective when enrollment is accepted by NYISO
- CSP may elect either Average Day CBL or Weather Adjusted CBL formula
- Change in the CBL formula can be made during the next open enrollment period

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Average Day CBL - Weekday

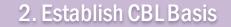
SUN	MON	TUE	WED	THU	FRI	SAT
Jun 8	Jun 9	Jun 10	Jun 11	Jun 12	Jun 13	Jun 14
	Day 30	Day 29	Day 28	Day 27	Day 26	Day 25
Jun 15	Jun 16	Jun 17	Jun 18	Jun 19	Jun 20	Jun 21
Day 24	Day 23	Day 22	Day 21	Day 20	Day 19	Day 18
Jun 22	Jun 23	Jun 24	Jun 25	Jun 26	Jun 27	Jun 28
Day 17	Day 16	Day 15	Day 14	Day 13	Day 12	Day 11
Jun 29	Jun 30	Jul 1	Jul 2	Jul 3	Jul 4	Jul 5
Day 10	Day 9	Day 8	Day 7	Day 6	Day 5	Day 4
Jul 6	Jul 7	Jul 8	Jul 9	Jul 10	Jul 11	Jul 12
Day 3	Day 2	Day 1	EDRP Event			

Average Day CBL – Weekday





Select 10 days prior to event from a 30 day period immediately before the event (based on specific exclusions)



Select 5 highest ranked days, based on average daily event period usage, from the 10 day CBL window



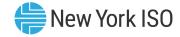
For each hour of the event, calculate CBL as the average hourly usage for the 5 days in the CBL Basis



Average Day CBL - Weekday

<u>1.Establish the CBL Window for weekdays</u>:

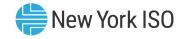
Step 1: Determine resource's peak load for the last 30 days that corresponds to the hours that cover the event



SUN	MON	I TU	E	WE	D	TH	U	FR		SAT	-
Jun 8	Jun 9	Jun 10		Jun 11		Jun 12		Jun 13		Jun 14	
	Day 30	Day 29		Day 28		Day 27		Day 26		Day 25	
		9	9		8		8		10		7
Jun 15	Jun 16	Jun 17		Jun 18		Jun 19		Jun 20		Jun 21	
Day 24	Day 23	Day 22		Day 21		Day 20		Day 19		Day 18	
5		8	9		10		13		11		6
Jun 22	Jun 23	Jun 24		Jun 25		Jun 26		Jun 27		Jun 28	
Day 17	Day 16	Day 15		Day 14		Day 13		Day 12		Day 11	
5	:	10	7		8		8		12		7
Jun 29	Jun 30	Jul 1		Jul 2		Jul 3		Jul 4		Jul 5	
Day 10	Day 9	Day 8		Day 7		Day 6		Day 5		Day 4	
5		11	8		12		9		5		6
Jul 6	Jul 7	Jul 8		Jul 9		Jul 10		Jul 11		Jul 12	
Day 3	Day 2	Day 1		EDR	P						
5	:	11	11	Ever	nt						

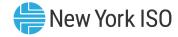
Maximum Load Value during Event hours

Peak Load hour = 13 (Day 20)



Step 2: Within the chosen 30 days prior to the event for which CBL is being calculated, beginning with the day prior to the event, exclude:

- Any holidays, as specified by the NYISO
- Days and the days prior when NYISO declared as SCR, EDRP or a TDRP event for which the resource was eligible for payment for a curtailment
- Days and the days prior in which the resource's DADRP curtailment bid was accepted in the DAM, whether or not the resource actually curtailed



SUN		MO	Ν	TUE		WE	D	TH	U	FR		SAT	-
Jun 8		Jun 9		Jun 10		Jun 11		Jun 12		Jun 13		Jun 14	
		Day 30		Day 29		Day 28		Day 27		Day 26		Day 25	
			9		9		8		8		10		7
Jun 15		Jun 16		Jun 17		Jun 18		Jun 19		Jun 20		Jun 21	
Day 24		Day 23		Day 22		Day 21		Day 20		Day 19		Day 18	
	5		8		9		10		13		11		6
Jun 22		Jun 23		Jun 24		Jun 25		Jun 26		Jun 27		Jun 28	
Day 17		Day 16		Day 15		Day 14		Day 13		Day 12		Day 11	
	5		10		7		8		8		12		7
Jun 29		Jun 30		Jul 1		Jul 2		Jul 3		Jul 4		Jul 5	
Day 10		Day 9		Day 8		Day 7		Day 6		Day 5 Holida	N.	Day 4	
	5		11		8		12		9	nondo	5		6
Jul 6		Jul 7		Jul 8		Jul 9		Jul 10		Jul 11		Jul 12	
Day 3		Day 2		Day 1		EDR	P						
	5		11	Ineligible Da (Day Before	^y 11	Ever	nt						

Maximum Load Value during Event hours

Peak Load hour = 13 (Day 20)



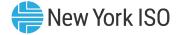
Step 3: Calculate the initial seed value:

Initial seed value = 25% x Maximum peak load hour value

= 25% x 13 = 3.25

Step 4: For each remaining weekday that is not excluded, within the last 30 days, calculate Average Daily Event Period Usage (simple average of resource's usage over hours defining the event)

If Average Daily Event Period Usage < Initial Seed Value, exclude that day



Step 5: After all exclusions, establish the CBL window (reverse order selection of the last 10 days prior to the event for which CBL is being calculated)

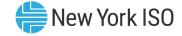
- After all exclusions, if there are fewer than 10 days, but no less than 5 days, establish those days as part of the CBL window
- If fewer than 5 days remain, contact NYISO Stakeholder Services



SUN	MON	TUE	WED	THU	FRI	SAT
Jun 8	Jun 9	Jun 10	Jun 11	Jun 12	Jun 13	Jun 14
Jun 15	Jun 16	Jun 17	Jun 18	Jun 19	Jun 20	Jun 21
Jun 22	Jun 23	Jun 24	Jun 25	Jun 26	Jun 27	Jun 28
	CBL Day 10 For July 9	CBL Day 9 For July 9	CBL Day 8 For July 9	CBL Day 7 For July 9	CBL Day 6 For July 9	
Jun 29	Jun 30	Jul 1	Jul 2	Jul 3	Jul 4	Jul 5
	CBL Day 5 For July 9	CBL Day 4 For July 9	CBL Day 3 For July 9	CBL Day 2 For July 9	Holiday	
Jul 6	Jul 7	Jul 8	Jul 9	Jul 10	Jul 11	Jul 12
	CBL Day 1 For July 9	Ineligible Day (Day Before)	EDRP Event			



	CBL Window Selection - Single Weekday Event Example										
Event date	Day 1	Day 2	Day3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10	
9-July	7-July	3-July	2-July	1-July	6/30	6/27	6/26	6/25	6/24	6/23	



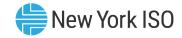
• Example of CBL Window selection if there are multiple events

SUN	MON	TUE	WED	THU	FRI	SAT
Jun 8	Jun 9	Jun 10	Jun 11	Jun 12	Jun 13	Jun 14
Jun 15	Jun 16	Jun 17	Jun 18	Jun 19	Jun 20	Jun 21
				CBL Day 10 for July 9	CBL Day 9 for July 9	
Jun 22	Jun 23	Jun 24	Jun 25	Jun 26	Jun 27	Jun 28
	CBL Day 8 for July 9	CBL Day 7 for July 9	CBL Day 6 for July 9	CBL Day 5 for July 9	CBL Day 4 for July 9	
Jun 29	Jun 30	Jul 1	Jul 2	Jul 3	Jul 4	Jul 5
	Ineligible Day (Day Before)	DADRP Schedule	CBL Day 3 for July 9	CBL Day 2 for July 9	Holiday	
Jul 6	Jul 7	Jul 8	Jul 9	Jul 10	Jul 11	Jul 12
	CBL Day 1 for July 9	Ineligible Day (Day Before)	EDRP Event			

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	CBL Window Selection - Multiple Weekday Event Example										
Event date	Day 1	Day 2	Day3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10	
9-July	3-July	2-July	2-July	27-June	26-June	25-June	24-June	23-June	20-June	19-June	

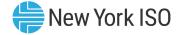


2. Establish the CBL Basis:

CBL window	HB 12	HB 13	HB 14	HB 15	Total Event Period usage	Avg Event Period usage	Rank
CBL DAY 1	10	11	7	5	33	8.33	4
CBL DAY 2	8	6	9	6	29	7.25	7
CBL DAY 3	9	12	10	7	38	9.5	1
CBL DAY 4	7	8	6	6	27	6.75	8
CBL DAY 5	10	11	9	7	37	9.25	2
CBL DAY 6	12	8	9	7	36	9.00	3
CBL DAY 7	5	8	8	6	27	6.75	8
CBL DAY 8	7	8	8	7	30	7.50	6
CBL DAY 9	7	6	6	5	24	6.00	10
CBL DAY 10	8	10	9	6	33	8.25	5

Step 1: Rank the days from the CBL window according to the Average Daily Event period usage level

• The EDRP event on July 9 was from 12 noon to 4 pm (HB 12 to HB 15) The MWh consumption for those 4 hours for the days that form the CBL window are given above



Step 2: Select the top 5 ranked days. These days will form the CBL basis

CBL window	HB 12	HB 13	HB 14	HB 15	Total Event Period usage	Avg Event Period usage	Rank
CBL DAY 1	10	11	7	5	33	8.33	4
CBL DAY 3	9	12	10	7	38	9.5	1
CBL DAY 5	10	11	9	7	37	9.25	2
CBL DAY 6	12	8	9	7	36	9.00	3
CBL DAY 10	8	10	9	6	33	8.25	5



3. <u>Calculate CBL for each hour</u>:

Using the 5 highest ranked days selected (simple average for each hour)

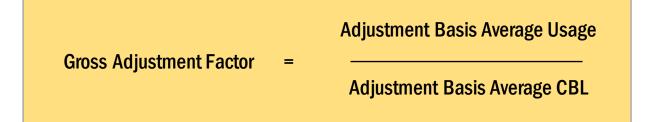
CBL window	HB 12	HB 13	HB 14	HB 15
CBL DAY 1	10	11	7	5
CBL DAY 3	9	12	10	7
CBL DAY 5	10	11	9	7
CBL DAY 6	12	8	9	7
CBL DAY 10	8	10	9	6

Time	HB 12	HB 13	HB 14	HB 15
Avg day CBL	9.8	10.4	9	6.5

Weather Adjusted CBL- Weekday



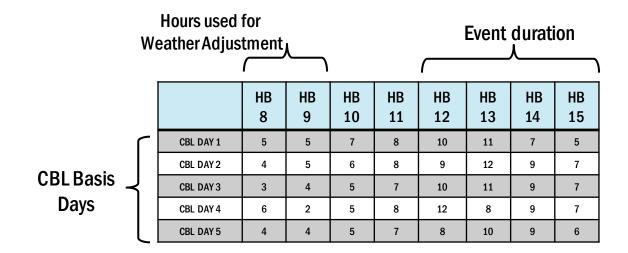
- For weather adjusted CBL calculation, the CBL would be adjusted upward or downward based on the actual usage for 2 hours, starting 4 hours prior to start of event
 - CBL is adjusted using the Gross Adjustment Factor



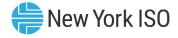
Adjustment Basis Average Usage : Average of actual usage for 2 hours, starting 4 hours prior to start of Event Adjustment Basis Average CBL: Average of CBL calculated for 2 hours, starting 4 hours prior to start of Event



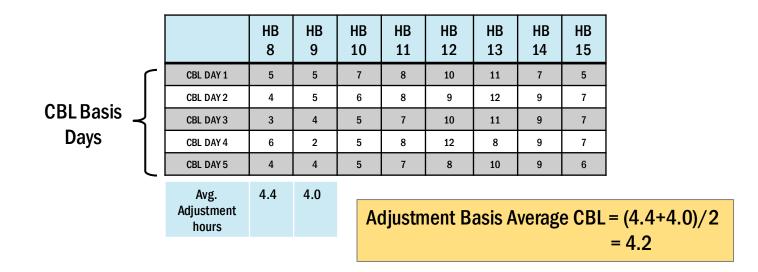


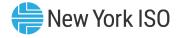


Weather Adjusted CBL- Weekday



Adjustment Basis Average CBL: Average of the MWh for HB8 and HB9 over the 5 days chosen for CBL calculation (CBL basis)



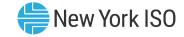


Weather Adjusted CBL- Weekday

Adjustment Basis Average Usage : Average of actual load MWh in HB8 and HB9 on the day of the event (2 hours prior to event notification)

	HB 8	HB 9
Event Day-Actual Load	4	5

Adjustment Basis Average Usage = (4+5)/2 = 4.5



Weather Adjusted CBL-Weekday

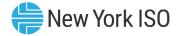
Gross Adjustment Factor = 4.5/4.2 = 1.07

The CBL is weather adjusted <u>upward</u> by 7%

Time	HB 12	HB 13	HB 14	HB 15
Avg day CBL	9.8	10.4	8.6	6.5
Weather Adjusted CBL	10.5	11.1	9.2	7.0

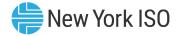
Note: If the average of actual usage in the 2 specified hours is <u>lower</u> than the Adjustment Basis Average CBL, the ratio will be less than 1, and therefore CBL would be adjusted <u>downward</u>

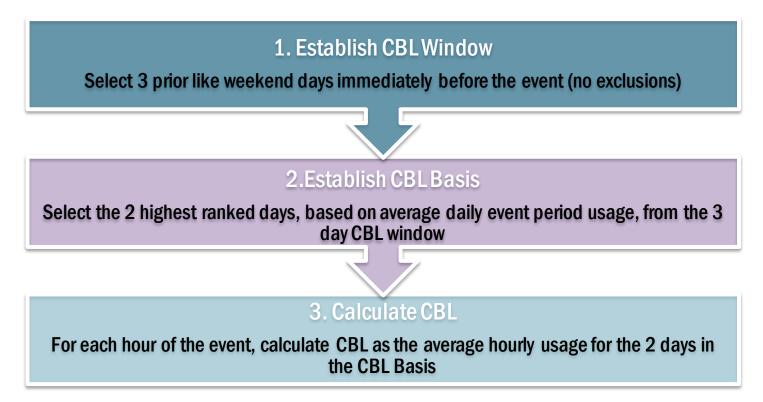
* Up to ±20%

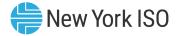


Average Day CBL- Weekends

SUN	MON	TUE	WED	THU	FRI	SAT
Jun 8	Jun 9	Jun 10	Jun 11	Jun 12	Jun 13	Jun 14
Jun 15	Jun 16	Jun 17	Jun 18	Jun 19	Jun 20	Jun 21
Jun 22	Jun 23	Jun 24	Jun 25	Jun 26	Jun 27	Jun 28
Jun 29	Jun 30	Jul 1	Jul 2	Jul 3	Jul 4	Jul 5
						EDRP Event
	· · · -					
Jul 6	Jul 7	Jul 8	Jul 9	Jul 10	Jul 11	Jul 12



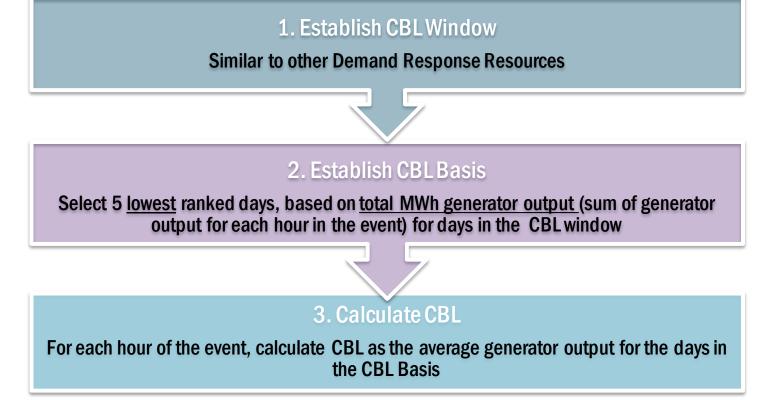




Average Day CBL- Weekends

SUN	MON	TUE	WED	THU	FRI	SAT
Jun 8	Jun 9	Jun 10	Jun 11	Jun 12	Jun 13	Jun 14
						CBL Day 3 For July 5
Jun 15	Jun 16	Jun 17	Jun 18	Jun 19	Jun 20	Jun 21
					L	CBL Day 2 For July 5
Jun 22	Jun 23	Jun 24	Jun 25	Jun 26	Jun 27	Jun 28
						CBL Day 1 For July 5
Jun 29	Jun 30	Jul 1	Jul 2	Jul 3	Jul 4	Jul 5
				,		EDRP Event
Jul 6	Jul 7	Jul 8	Jul 9	Jul 10	Jul 11	Jul 12
Day 3	Day 2					

CBL Calculation Method - Local Generator Resources



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🖶 New York ISO

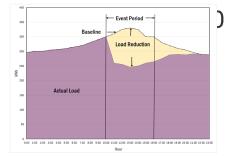
Topic 5: Method for measuring and reporting performance



FOR TRAINING PURPOSES ONLY



Performance Measurement for Energy Payments



Resource Response Type	Performance Measurement for each hour
Response Type C (Curtailment only)	CBL-Actual Net Load using net meter
Response Type G (Local Generator only)	Metered Generator Output – CBL _G
Response Type B (Both)	CBL – Actual Load _{using Net meter} Or [Metered Generator Output – CBL _G] + [CBL – Actual Load _{using load meter}]

Note: Average Day or Weather adjusted CBL based on resource enrollment Weekday or weekend CBL calculation based on actual event day



* For 1 example hour

Performance Measurement - Examples

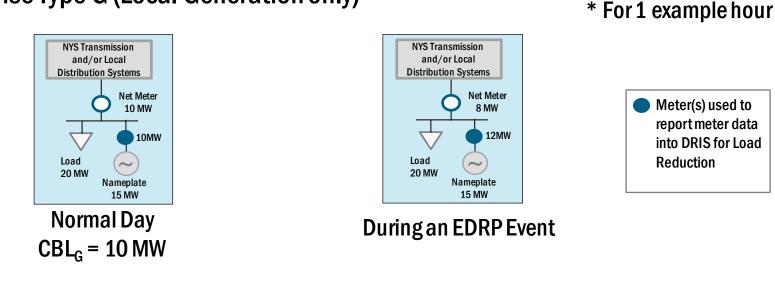
Response Type C: (Curtailment Only)

NYS Transmission NYS Transmission and/or Local and/or Local Distribution Systems **Distribution Systems** Meter(s) used to Net Meter Net Meter report meter data 20 MW 15 MW into DRIS for Load Reduction Load 20MW Load 15MW Normal Day **During an EDRP Event** CBL = 20 MW

Performance measurement (for this hour) = CBL – Actual Net Load = 20 MW – 15 MW = 5 MW

Performance Measurement Examples

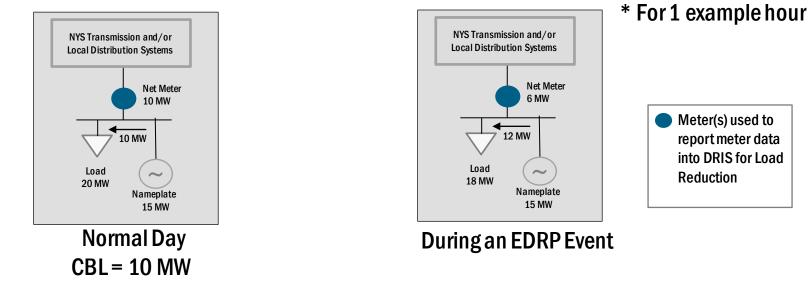
Response Type G (Local Generation only)



Performance measurement (for this hour) = Metered Generator Output – CBL_G = 12 MW–10 MW = 2 MW

Performance Measurement - Examples New York ISO

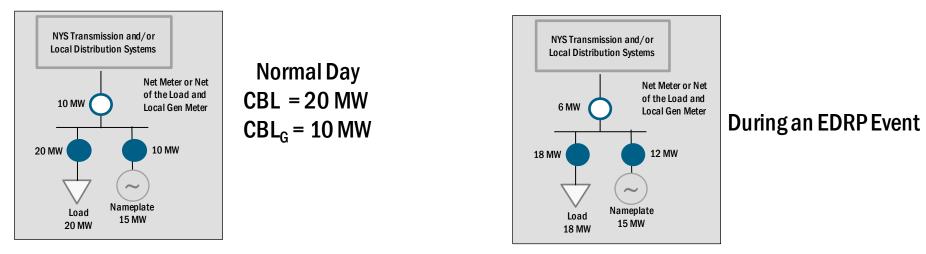
• Response Type B (Curtailment and Local Generator)



Performance measurement (for this hour) = CBL – Actual Net Load = 10 MW –6 MW = 4 MW

Performance Measurement - Examples

Response Type B (Curtailment and Local Generator)



Performance Measurement = [Metered Generator Output – CBL_G] + [CBL – Actual Load using load meter]

- = [12 MW 10 MW] + [20 MW 18 MW]
- = 2 MW + 2MW

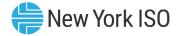
Topic 6: Event notification process and customer response to an event





EDRP Event Deployment

- An EDRP event activation is one of the emergency procedures in response to an Operating Reserve Forecast Shortage
- EDRP resources may be deployed in conjunction with SCR resources, as part of a NYISO activated Reliability Demand Response
- Responsibilities of EDRP resources during a Demand Response Event:
 - Receiving Event Notifications
 - Reporting expected curtailment values by zone
 - Voluntarily performing load reduction during the event



Event Notification

- Notification types: Notification types include but are not limited to:
 - Day-Ahead Advisory
 - In-day advisory
 - Activation (2-hour Notice)
 - Immediate activation
 - Extension of Event or
 - Early termination of Event

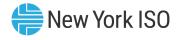
• Notification from the NYISO will take place via two communications media:

- Burst e-mail messages to all CSP Event-Responder e-mail contacts specified in DRIS
- Automated phone call to all CSP Event-Responder phone contacts specified in DRIS



Event Notification

- Both e-mail and automated phone Event Notifications contain the following parameters:
 - Notification Type: NYISO Event, Targeted Demand Response Program Event, Performance Test 1 or 2
 - Program: EDRP or SCR
 - Message type: Notification type as listed in previous slide
 - Zone(s) or Subload Pocket(s)
 - Start Time of Event
 - End Time of Event
- E-mail notification will indicate the "From" address as <u>edrp-scr@nyiso.com</u>



Event Notification- CSP Response

- After receiving an EDRP Notification, the CSP shall take the following steps:
 - 1. Assess whether or not the CSP has resources that can respond, and the kW level of the response by zone
 - 2. Provide the expected kW response (expected curtailment value) by load zone in accordance with the instructions in the notification into DRIS
- If CSP has missed the deadline to enter the expected curtailment value, they can provide the information to NYISO's Stakeholder Services
- If the NYISO does not receive the response before the Response expiration date/time, it may call upon additional CSP contact numbers to make a connection



Viewing Event Notification Response Deadline in DRIS

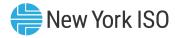
	From Date: X III Program: EDRP View Available MW Values ion Summary View Available MW Values Expected MW for Scarcity Pricing Scarcity Events Period Notification Wessane Type Program Event End Zones Response Notification								
Main + MP+ Res	ource - SCR - Perfo	ormance Factors + DR Event + I	Mitigation - Tables - No	tification - DSASP - BT	гм -				
Events From Date: X Program: EDRP			Response Summary View Available MW V Expected MW for Sca	/alues			↓ ↓		
Capability Period	Туре	Notice Date/Time	Message Type	Program	Date/Time	Date/Time	Zones	Expiration Date/Time	Created By
Summer 2016	NYISO Event	08/12/2016 09:47	Activation(2 Hour Notic	e) EDRP	08/12/2016 13:00	08/12/2016 18:00	A, B, C, D, E, F, G, H, I, J, K	08/12/2016 10:47	
Summer 2016	NYISO Event	08/12/2016 09:47	Activation(2 Hour Notic	e) SCR	08/12/2016 13:00	08/12/2016 18:00	A, B, C, D, E <mark>,</mark> F, G, H, I, J, K	08/12/2016 10:47	
Summer 2016	NYISO Event	08/11/2016 14:24	Day-Ahead Advisory	EDRP	08/12/2016 12:00	08/12/2016 18:00	A, B, C, D, E, F, G, H, I, J, K 08/11/2016 15:24		
Summer 2016	NYISO Event	08/11/2016 14:24	Day-Ahead Advisory	SCR	08/12/2016 12:00	08/12/2016 18:00	A, B, C, D, E, F, G, H, I, J, K	08/11/2016 15:24	

***Note: The Summer 2016 date was selected as an example as it offered robust information.



Event Notification- CSP Response

- CSPs should respond with the expected curtailment values for each zone indicated in the Event Notification for which the resources are enrolled in DRIS, according to instructions provided in the DRIS user's Guide (Section 11.3)
- CSPs may provide multiple updates to the expected curtailment value; the value with the most recent submittal time will be saved in DRIS



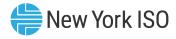
Event Notification – CSP Response

Main • MP• Re: Capability Perior Events From Date	This constitutes an official EDRP Event Activation Two Hour notice. If any questions arise concerning this EDRP Event Activation Two							emand Response ch zone. This data is used	
lotification Summ	Notific	ation Respo	onses						
Capability Period	Zone	MP Name		Total kW Available	Expected kW Commitment	Not Participating	Response User	Response Date/Time	-
Summer 2016	A	Market Par	ticipant	300				08/12/2016 09:59:59	-
ummer 2016	С	Market Par	ticipant	800				08/12/2016 09:59:59	
ummer 2016	D	Market Par	ticipant	900				08/12/2016 09:59:59	
	E	Market Par	ticipant	700				08/12/2016 09:59:59	
	F	Market Par	rticipant	1,700		100		08/12/2016 09:59:59	
	Н	Market Par	rticipant	5,550		m		08/12/2016 09:59:59	
									otal dunt: 3 Respond
	Save	Cancel T	otal count: 6					a Excel	-

***Note: The Summer 2016 date was selected as an example as it offered robust information.

Load Reduction during EDRP Event ^{Sow York ISO}

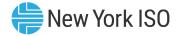
- EDRP Resources can reduce load during the hours of the Event, even if CSP has not entered the expected curtailment values before the Response Expiration Date/Time
- CSPs will receive a separate Event Notification for Events that are either extended or terminated early from original event end time for one or more zones or sub load pockets on the original Event Notification
- The expected curtailment kW values for the original Event Notification will be used as the value for extended Events



Sample Load Reduction Plan for an EDRP Resource

Sample Load Reduction Plan for a resource enrolled as Response Type B, with an expected curtailment value of 300 kW:

Time with respect to the EDRP Event	Action	Load Reduction Achieved (kW)
2 hours prior	Pre-cool the office area from 70 degrees to 65 degrees	
15 minutes prior	Turn off the HVAC	150 kW
15 minutes prior	Transfer critical load to backup generator	100 kW
At the start	Dim the office lights	50 kW
15 minutes post	Return to normal operations	



Event Summary

- After the Event has taken place, event details can be found in DRIS
 - DR Event Summary has information about proper resource data that needs to be reported for the event

	NEW YORK	PERATOR			sponse Information Demand Response Event									
	d: Summer 2016		Zone:	INT Mitigation Tat R Event Summary Vent Response Deta	ves Votification VDSASP BTM V ype: V Program:		isplay							
Event Summary														
Capability Period	Event Type	Progr	Event Start Date	Event End Date	Zones	Approved	First Hour of Payment	Last Hour of Payment	First Hour of Performance	Last Hour of Performance	CBL Start Date	CBL End Date	Response Submittal End Date	Auto Created
Summer 2016	NYISO Event	EDRP	08/12/2016 13:00	08/12/2016 18:00	A, B, C, D, E, F, G, H, I, J, K	V	08/12/2016 13:00	08/12/2016 17:00			07/13/2016 00:00	08/10/2016	10/26/2016 17:00	V

***Note: The Summer 2016 date was selected as an example as it offered robust information.

Topic 7: Reporting Process for Event Response details



Event Response



- Resources submit Event Response data through DRIS within a pre-established time frame
 - Format specified in the DRIS User's Guide
- The Response submittal End date/time is 5:00 P.M., 75 days after Event deployment
 - Response submittal end date can be found in the Event Summary page under DR Event in DRIS, and in the DR event calendar

	CINDEPENI INDEPENI SYSTEM O	PERATOR			Sponse Informatio Demand Response Eve	and the second second second second									
Main MP	 Resource • 	SCR -	Performance Factor	s - DR Event -	Mitigation - Tables - Notificat	tion - DSASP -	BTM -			1	- Contraction 11				
	ability Period: Summer 2021 V Zone: Event Summary Program: EDRP V Display														
Capability Period	Event Type	Progr	Event Start Date	Event End Date	Zones	Approved	First Hour of Payment	Last Hour of Payment	First Hour of Performance	Last Hour of Performance	CBL Start Date	CBL End Date	Response Submittal End Date	Auto Created	
Summer 2021	NYISO Event	EDRP	08/27/2021 13:00	08/27/2021 20:00	к		08/27/2021 13:00	08/27/2021 19:00			07/28/2021 00:00	08/25/2021	11/10/2021 17:00		
Summer 2021	NYISO Event	EDRP	08/26/2021 13:00	08/26/2021 20:00	К		08/26/2021 13:00	08/26/2021 19:00			07/27/2021 00:00	08/24/2021	11/09/2021 17:00		
Summer 2021	NYISO Event	EDRP	08/25/2021 13:00	08/25/2021 20:00	К		08/25/2021 13:00	08/25/2021 19:00			07/26/2021 00:00	08/23/2021	11/08/2021 17:00		
Summer 2021	NYISO Event	EDRP	08/13/2021 13:00	08/13/2021 20:00	К		08/13/2021 13:00	08/13/2021 19:00			07/14/2021 00:00	08/11/2021	10/27/2021 17:00		
Summer 2021	NYISO Event	EDRP	08/12/2021 13:00	08/12/2021 20:00	к		08/12/2021 13:00	08/12/2021 19:00			07/13/2021 00:00	08/10/2021	10/26/2021 17:00		
Summer 2021	NYISO Event	EDRP	08/11/2021 13:00	08/11/2021 19:00	К		08/11/2021 13:00	08/11/2021 18:00			07/12/2021 00:00	08/09/2021	10/25/2021 17:00		

Importing Event Response Details for an EDRP Resources

New York ISO	About Us V Grid of the F	iuture v Careers v Calendar Support v Login v PLANNING v COMMITTEES v TRAINING v Q
REAL-TIME DATA DASHBOARD System conditions	ENERCY MARKET & OPERATIONAL DATA Pricing Data Power Grid Data Load Data Reports & Info Postings by Date Custom Reports Anciliary Services	INSTALLED CAPACITY MARKET (ICAP) TRANSMISSION CONGESTION CONTRACTS (TCC) DISTRIBUTED ENERGY RESOURCES (DER) <u>Demand Regranse</u> Behind the Marker Net Generation MARKET ACCESS LOGIN

Independent Sys	stem Operator	

Mew York ISO

Markets

Real-Time Dashboard

System Conditions

Demand Response

Market Access Login

Energy Market & Operational Data 🗸

Transmission Congestion Contracts (TCC

Behind-the-Meter Net Generation (BTMNG)

Distributed Energy Resources (DER)

Installed Capacity Market (ICAP)

MARKETS / DISTRIBUTED ENERGY RESOURCES (DER) / DEMAND RESPONSE

DEMAND RESPONSE

NYISO's demand response programs pay qualifying participants to reduce their consumption ("load") for discrete periods of time at the NYISO's direction.

DEMAND RESPONSE INFORMATION SYSTEM (DRIS) LOGIN

Contact Customer Support stakeholder_services@nyiso.com 518-356-

5060

Support ¥

TRAINING ¥

Login N

0

New York ISO

Useful Links

- NYISO Registration Information
- pdf DRIS Users Guide
- ICAP Manual
- edf EDRP Manual

Grid of the Future Y Careers Y Calendar

MARKETS V LIBRARY V PLANNING V COMMITTEES V

pdf DADRP Manual

Demand Response

Demand Response (DR) is the act of reducing energy consumption from the grid at the direction of the NYISO.

Demand Response is provided by Demand Side Resources, which are electricity consumers located in New York State that enroll to take part in a specific DR program. These resources are capable of reducing the power consumed from the grid for discrete periods of time as directed by the NYISD.

NYISO's Demand Response programs pay qualifying participants to reduce their consumption ('load') for discrete periods of time.

Reliability-Based Programs - NYISO determines activation

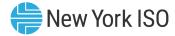
About Us Y

SCR

FNPP

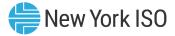
Economic-Based Programs - Resource determines when to participate (through supply offers) DSASP DADRP For further details, please see NVISD Demand Response Programs: Frequently Asked Questions or contact NVISD **Demand Response** Name Published Type ✓ DR02 - Special Case Resource ICAP Program DR03 - Emergency Demand Response Program DRIS EDRP Event Response Import Template - xls format 2012/09/05 *** DRIS EDRP Event Response Import Template - csv. forma 2012/09/05 @ DR04 - Demand Side Ancillary Service Program DR05 - Day Ahead Demand Response Program DR06 - Demand Response Activations DR07 - Monthly Net Benefit Offer Floor

FOR TRAINING PURPOSES ONLY



Event Response Import Template

- Header data:
 - Event type
 - DR program
 - Event start date and time
- Resource data required in the Event Response file includes:
 - CBL Dates (1-10) Customer baseline calculation date (1-10)
 - CBL Include Indicator (1-10) Field to indicate if the CBL date will be included in the CBL calculation
 - CBL kW (HB0-HB23) Resource hourly CBL calculation for each Event hour
 - Metered kW (HB0-HB23) Resource hourly metered load for each Event hour
- Instructions to import the Event Response file can be found in the DRIS User's Guide (Section 11.7)



Viewing Event Response Details

 Once the CSP has submitted the Event Response file, details can be viewed on the Event Response Details page in DRIS

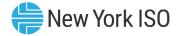
ALLIA ALANKARA	SCR Performance Factor	DR Event • Mitigation • Tables	Notification DSASP	Dim -							
Capability Period: Summer 2	021 💙 Zone: K	Resource ID:	Y Status:	~							
Event: NYISO - E	DRP MP: All	Gen PTID:	Y Aggregation:	×	Reporting:	Y Display					
↓ Page 1 of 4 ▶	н @										Displaying 1 - 100
nt Information			Performance Hou	rly Meter Dat	a Enrolln	nent Hourly Me	ter Data CB	L Dates Hourly Billing	Data		
Type: NYISO Event	Program: EDRP	Zones: K	Resource Hour	Net ACL	Verified ACL	CBL kW	Metered kW	Energy Reduction kW	Declared Value/Test Value	Capacity Reduction	Reason for Under Revie
vent Dates	Performance Hours	Response Submittal Dates	13	0		3500	300	3200	500	0	
art: 08/13/2021 13:00	First: 08/13/2021 13:00	Start: 08/17/2021 08:00	14	0		3525	310	3215	500	0	
nd: 08/13/2021 20:00	Last: 08/13/2021 19:00	End: 10/27/2021 17:00	15	0		3495	290	3205	500	0	
			16	0		3500	300	3200	500	0	
yment Hours		CBL Dates	17	0		3495	305	3190	500	0	
rst: 08/13/2021 13:00		Start: 07/14/2021									
st: 08/13/2021 19:00		End: 08/11/2021									

Topic 8: Verification process for CBL after an event



FOR TRAINING PURPOSES ONLY





EDRP Verification

- Curtailment Service providers must report load reduction data to the NYISO on or before the 75th day after deployment
- EDRP resource performance is validated by hourly interval metering data or nonrevenue interval metering devices that meet an overall accuracy of ±2%
- Load reductions for which all required settlement and performance data is not entered into DRIS by 75 days after the date of deployment will not be compensated pursuant to the EDRP
- Load reduction settlement and performance data is subject to NYISO audit and Market Mitigation and Analysis review and verification
- For any erroneous payments made to the CSP, NYISO has the right to recover it either by reducing other payments to the CSP or by other lawful means



Historical Operating Data

- Upon request, CSPs must provide historical metering, meter information and operating data for each resource enrolled that is consistent with the enrolled meter configuration
- CSPs must retain all interval meter readings upon which it bases its certification of compliance for a period of three years

Topic 9: Settlement for EDRP Event Response

FOR TRAINING PURPOSES ONLY



EDRP Settlement Procedures



- Upon deployment of an EDRP event by the NYISO, CSPs are eligible to be paid for verified Load reductions made during each hour of the payment eligibility period
- The first hour of the payment eligibility period will begin at the top of the hour within which the deployment event is to start as identified by NYISO
 - For immediate deployment events, the NYISO-identified start time is the time of the deployment message
- The payment eligibility period ends at the later of:
 - The third consecutive hour following the first hour of the payment eligibility period or
 - The deployment event end time identified in the deployment message, if longer than four hours
- The end time of a deployment event may be adjusted by the NYISO after the initial deployment message

EDRP- Settlement Structure



Program Deployment Duration (Hours)	Applicable Hours	Calculation	Hourly Settlement (\$)
≤ 2 Hours (Starts at the	1 st 2 hours	Step 1: Verified Load Reduction per hour (MWh) x Max[\$500/MWh, Real Time Zonal LBMP(\$)]	Step 1 +Step 2
top of the hour) ·	Next 2 hours	Step2: Verified Load Reduction per hour (MWh) x RTD Zonal LBMP (\$)	
\leq 2 Hours (Starts after the top of the hour)	1 st 3 hours	Step 1: Verified Load Reduction per hour (MWh) x Max[\$500/MWh, Real Time Zonal LBMP (\$)]	Step 1+Step 2
	Remaining hours	Step2: Verified Load Reduction per hour (MWh) x RTD Zonal LBMP (\$)	
> 2 and ≤ 3	1 st 3 hours	Step 1: Verified Load Reduction per hour (MWh) x Max[\$500/MWh, RTD Zonal LBMP(\$)]	Step 1+Step 2
	Remaining hours	Step2: Verified Load Reduction per hour (MWh) x Real Time Zonal LBMP (\$)	
>3	All hours		Verified Load Reduction per hour (MWh) x Max[\$500/MWh/ Real Time Zonal LBMP (\$)]

Settlement for EDRP Resources Participating in other DR Programs



- EDRP resources that are scheduled to perform in either the DADRP or DSASP during an EDRP event will have their Load Reduction payments adjusted to reflect the payments made for performance under DADRP or DSASP
- The EDRP resource will be paid for the response to the program only if and to the extent that the resource performed above its commitment to the DADRP or DSASP DAM schedule

Resource's performance eligibleVerified Load ReductionDAfor EDRP payment (kWh)reported by resource(kWh)or

DADRP or DSASP DAM contribution (kWh)

Hourly Billing Data-DRIS



		DR Event • Mitigation • Tables	· · · · · · · · · · · · · · · · · · ·	DSASP . BI								
apability Period: Summer 2	21 Y Zone: K	Kesource ID:	× 9	tatus:	~							
Event: NYISO - E	DRP 0 MP: All	Gen PTID:	Y Aggreg	ation:	⊻ Re	porting:	Y Displ	w .				
4 Page 1 of 4 >	н @											Displaying 1 - 100 e
ent Information			Performa	nce Hourh	y Meter Data	Enrollr	ment Hourly P	leter Data C	BL Dates Hourly Billing	Data		
Type: NYISO Event	Program: EDRP	Zones: K	Resource	Hour +	Net ACL Ve	erified ACL	CBL kW	Metered kW	Energy Reduction kW	Declared Value/Test Value	Capacity Reduction	Reason for Under Revie
Event Dates	Performance Hours	Response Submittal Dates		13	0		3500	300	3200	500	0	
tart: 08/13/2021 13:00	First: 08/13/2021 13:00	Start: 06/17/2021 08:00		14	0	83	3525	310	3215	500	0	
End: 08/13/2021 20:00	Last: 08/13/2021 19:00	End: 10/27/2021 17:00		15	0	83	3495	290	3205	500	0	
				16	0	10	3500	300	3200	500	0	
ayment Hours		CBL Dates		17	0	20	3495	305	3190	500	0	
irst: 08/13/2021 13:00		Start: 07/14/2021										
		End: 08/11/2021										

Resource Hour	Status	Settlements kW	Zonal LBMP	Net Energy Payment	Adjusted for Market.
Invoiced					
13	Invoiced	3200	100	1600	
14	Invoiced	3215	95	1607.50	
15	Invoiced	3205	105	1602.50	
16	Invoiced	3200	90	1600	(ff)
17	Invoiced	3190	102	1595	
	 Invoiced 13 14 15 16 	Invoiced I3 Invoiced 14 Invoiced 15 Invoiced 16 Invoiced	 ☐ Invoiced 13 Invoiced 3200 14 Invoiced 3215 15 Invoiced 3205 16 Invoiced 3200 	Invoiced 3200 100 14 Invoiced 3215 95 15 Invoiced 3205 105 16 Invoiced 3200 90	Invoiced 3200 100 1600 14 Invoiced 3215 95 1607.50 15 Invoiced 3205 105 1602.50 16 Invoiced 3200 90 1600



EDRP Settlement Related Reports

DRIS:

DR Event

L+ Event Response Details

<u>Customer Settlements Interface (CSI):</u>

Consolidated Invoice

└→ Invoice Summary Report

└→ Invoice Detail Report

Decision Support System (DSS):

Corporate Reports

└→ Hourly and Daily Advisory files



EDRP Summary

- Define the purpose of Emergency Demand Response Program (EDRP)
- Identify program eligibility requirements
- Summarize the process for enrollment
- Define and explain how Customer Baseline Load (CBL) is calculated
- Describe method for measuring and reporting performance
- Explain the event notification process and customer response to an event
- Describe the reporting process for Event Response details
- Describe verification process for CBL after an event
- Describe settlement for an EDRP Event Response



References

- Market Services Tariff (MST)
- Emergency Demand Response Program Manual
- Emergency Operations Manual
- Ancillary Services Manual
- Market Participant User's Guide
- Demand Response Information System (DRIS) User's Guide