



**UG 26**

# **Transmission Cost Recovery User's Guide**

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## Table of Contents

<b>TABLE OF CONTENTS.....</b>	<b>III</b>
<b>TABLE OF FIGURES.....</b>	<b>IV</b>
<b>REVISION HISTORY.....</b>	<b>V</b>
<b>1. INTRODUCTION.....</b>	<b>1</b>
1.1. System Purpose and Capabilities .....	1
1.2.Pre-Requisites for System Use .....	1
1.3.NYISO User Guide Web Page.....	1
<b>2. ACCESSING THE CSP – TRANSMISSION COST RECOVERY SCREEN .....</b>	<b>3</b>
2.1.CSP Login.....	3
2.2.Authentication .....	4
<b>3. USING THE TRANSMISSION COST RECOVERY SCREEN .....</b>	<b>5</b>
3.1.Select Contact Information.....	5
3.2.Enter Recovery Period Information .....	6
3.3.Delete Recovery Period Information .....	7
3.4.Export Recovery Period Information.....	8
<b>4. RECOVERY PERIOD NOTIFICATIONS.....</b>	<b>10</b>
4.1.Recovery Period Submission Notification.....	10
4.2.Recovery Period Deletion Notification .....	10
4.3.Recovery Period Entry Reminder Notification .....	10

## Table of Figures

Figure 1: Transmission Cost Recovery User's Guide.....	2
Figure 2: CSP Login from Market Access Page .....	3
Figure 3: CSP Login Page.....	4
Figure 4: Transmission Cost Recovery Home page .....	4
Figure 5: Transmission Project Drop-down .....	5
Figure 6: Contact Information .....	5
Figure 7: Edit Contact Information.....	6
Figure 8: Transmission Project Drop-down .....	6
Figure 9: Recovery Period.....	7
Figure 10: Add Recovery Period .....	7
Figure 11: Delete Recovery Period .....	8
Figure 12: Delete Confirmation Prompt .....	8
Figure 13: Export All Projects.....	9
Figure 14: Submission Notification .....	10
Figure 15: Deletion Notification .....	10
Figure 16: Entry Reminder Notification.....	11

## Revision History

Version	Effective Date	Revisions
1.0	07/19/2024	Initial Release

## 1. Introduction

The Customer Settlements Portal (CSP) is a New York Independent System Operator, Inc. (NYISO) software application designed to allow viewing, downloading, and entry of Market Participant (MP) data for qualified users. The focus of this User's Guide is on the Transmission Cost Recovery screen within the CSP application.

The system will be accessible by external users, as well as internal NYISO Customer Settlements and other qualified internal NYISO departments for viewing and reporting purposes.

### 1.1. System Purpose and Capabilities

Via a Web-based interface, the Transmission Cost Recovery screen provides the means for a Transmission Owner / Developer or qualified user to:

- Select contact information
- Enter Recovery Period information
- Export Recovery Period information

### 1.2. Pre-Requisites for System Use

The Following are pre-requisites for using the Transmission Cost Recovery screen:


1. Register as a NYISO MP
2. Designated MP administrator(s) assigning user privileges to CSP Application - Transmission Recovery External User
3. Configure computers for system use

### 1.3. NYISO User Guide Web Page

To access the Transmission Cost Recovery User's Guide from the website:

1. Point your browser to the NYISO Home Page at the following URL: <https://www.nyiso.com>
2. Position your mouse over the **Library** drop-down menu and choose **Manuals, Tech Bulletins & Guides**.
3. On the **Manuals, Technical Bulletins & Guides** page, activate the **Guides** drop down menu. A link is displayed in the Guides section of the Web page. (Figure 1)

**Figure 1: Transmission Cost Recovery User’s Guide**



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NYISO Manuals specify and explain the procedures and policies used to operate the bulk power system of the New York Control Area and to conduct wholesale electricity markets, consistent with the NYISO Tariffs and Agreements. Manuals are organized by subject area and listed alphabetically; manuals with appendices and/or attachments are contained in folders and listed first in each subject area. NYISO Guides serve to assist users with information needed to participate in NYISO Administered Markets. NYISO Technical Bulletins explain changes to, and provide instruction for, NYISO processes and procedures. Refer to the Retired NYISO Technical Bulletins and Manuals link below for a list of retired NYISO documents.

**Manuals, Tech Bulletins & Guides**

Name	Published	Type
<a href="#">^ Guides</a>		
<a href="#">^ Guides</a>		
<a href="#">Credit Management System User's Guide</a>	2022/10/31	pdf
<a href="#">Demand Response Information System User's Guide</a>	2021/03/23	pdf
<a href="#">Generating Availability Data System Portal User's Guide</a>	2021/08/25	pdf
<a href="#">Generator Fuel and Emissions Reporting User's Guide</a>	2023/03/31	pdf
<a href="#">Grid Operations Coordination Portal User's Guide</a>	2023/05/05	pdf
<a href="#">ICAP Automated Market User's Guide</a>	2022/01/05	pdf
<a href="#">ICAP Reference System User's Guide</a>	2018/12/06	pdf
<a href="#">Joint Energy Scheduling System User's Guide</a>	2022/09/22	pdf

Transmission Cost Recovery User’s Guide | 2

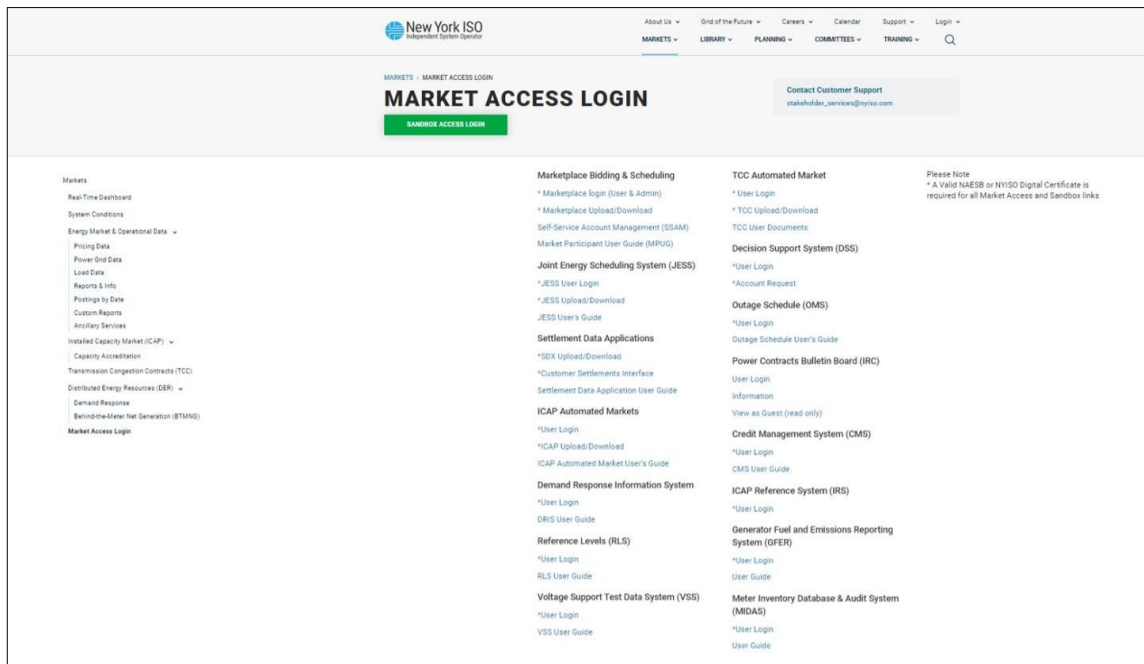
## 2. Accessing the CSP – Transmission Cost Recovery Screen

### 2.1. CSP Login

There are two ways to navigate to the CSP Login page:

1. Copy the link below and open in your browser.
  - a. <https://csp.nyiso.com/csp-ui/#/login>
  - b. Enter Username and password (Figure 3)
  - c. Transmission Cost Recovery screen is displayed (Figure 4)
2. Navigate to the NYISO Home Page, Login
  - a. From the NYISO Home page located at <https://www.nyiso.com/>
  - b. Navigate to Market Access Login (Figure 2)
  - c. Navigate to the CSP selection to access the system.
    - i. **Link:** <https://csp.nyiso.com/csp-ui/#/login> to navigate to User Login for CSP

**Figure 2: CSP Login from Market Access Page**






**Figure 3: CSP Login Page**

### Log into your NYISO account

**Figure 4: Transmission Cost Recovery Home page**


Transmission Cost Recovery
LOGOUT

---

Transmission Project

Project Name

EXPORT ALL PROJECTS

---

EDIT

Primary Contact

Secondary Contact

Name

Name

Name

Name

Email

Email

Email

Email

Phone Number

Phone Number

Phone Number

Phone Number

---

ADD RECOVERY PERIOD

Start Date	End Date	Recovery Amount	Update Username	Update Time	Locked/Unlocked	Delete

## 2.2. Authentication

Two-factor authentication is required to access the CSP.

1. A valid NYISO Market Information System (MIS) user account and associated password must be provided to authenticate the application.
2. The NAESB certificate associated with the MIS user account must be provided with each request.

### 3. Using the Transmission Cost Recovery Screen

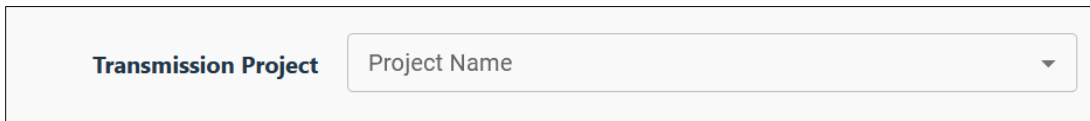
From the Transmission Cost Recovery home page (Figure 4) users can export all applicable recovery period data or select an individual Transmission Project.

#### 3.1. Select Contact Information

Users can select contact information for the individual Transmission Projects. The contact information selected will be utilized for the notifications applicable to the individual project.

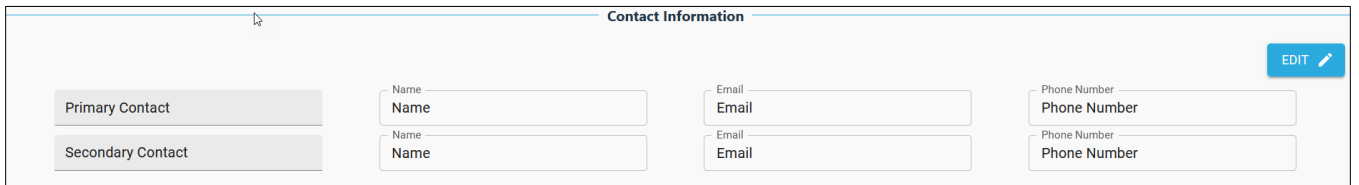
1. User selects a project (Figure 5)

**Figure 5: Transmission Project Drop-down**



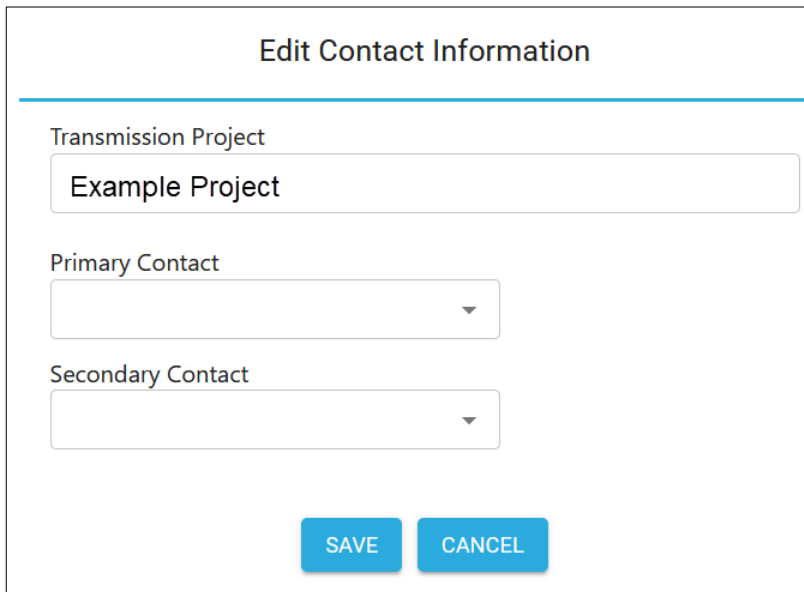
2. User selects **Edit** in the **Contact Information** section (Figure 6)

**Figure 6: Contact Information**



3. User selects a Primary Contact or Secondary Contact drop-down and selects a contact name from the list (Figure 7)
  - a. A Primary Contact is required for the entry of Recovery Period information
  - b. The list of contacts is derived from the information contained for the billing organization (Billing Org) in the MIS

**Figure 7: Edit Contact Information**



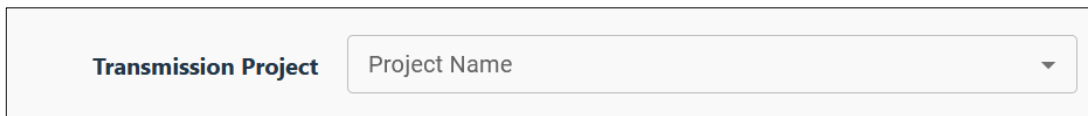
4. User selects **Save** to complete

### 3.2. Enter Recovery Period Information

Users can enter Recovery Period information for the individual Transmission Projects. Once the Recovery Period information is saved, the data is automatically locked. Once a Recovery Period is locked, the User would be required to reach out to NYISO Customer Settlements to have it unlocked if changes are necessary.

1. User selects a project (Figure 8)

**Figure 8: Transmission Project Drop-down**



2. User selects **Add Recovery Period** in the **Recovery Period** section (Figure 9)

**Figure 9: Recovery Period**

Recovery Period							ADD RECOVERY PERIOD (+)
Start Date	End Date	Recovery Amount	Update Username	Update Time	Locked/Unlocked	Delete	

3. User selects a **Recovery Period Start Date** (Figure 10)
  - a. User can type date format **MM/DD/YYYY** or select from the date drop-down
4. User selects a **Recovery Period End Date** (Figure 10)
  - a. User can type date format **MM/DD/YYYY** or select from the date drop-down
5. User enters a **Recovery Amount** (Figure 10)
  - a. Commas are not accepted
  - b. Decimals are accepted
6. User selects **Save** to complete (Figure 10)

**Figure 10: Add Recovery Period**

Add Recovery Period

---

Transmission Project

Recovery Period Start Date

Recovery Period End Date



Recovery Amount

### 3.3. Delete Recovery Period Information

If Recovery Period information is entered incorrectly, NYISO Customer Settlements has the ability to unlock the data to be deleted by the User.

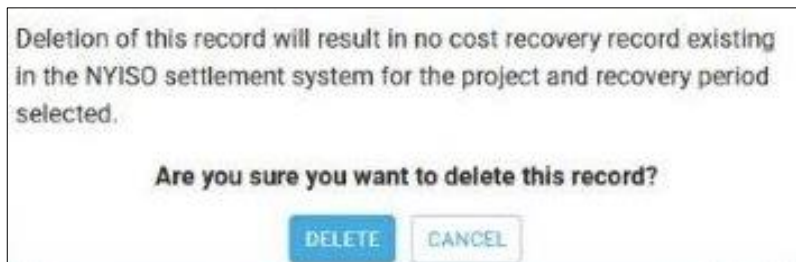
1. User's must contact the NYISO Customer Settlements to request the Recovery Period to be unlocked
  - a. Once the Recovery Period is unlocked, the lock icon will reflect the unlocked status and a delete icon will be present (Figure 11)

**Figure 11: Delete Recovery Period**

Recovery Period						
Start Date	End Date	Recovery Amount	Update Username	Update Time	Locked/Unlocked	Delete
07/01/2024	08/31/2024		NYISO User	04/09/2024, 08:15:59		
07/01/2023	06/30/2024		NYISO User	06/22/2023, 09:37:08		

2. Select Delete icon (Figure 11)
  - a. Confirm by selecting Delete (Figure 12)

**Figure 12: Delete Confirmation Prompt**

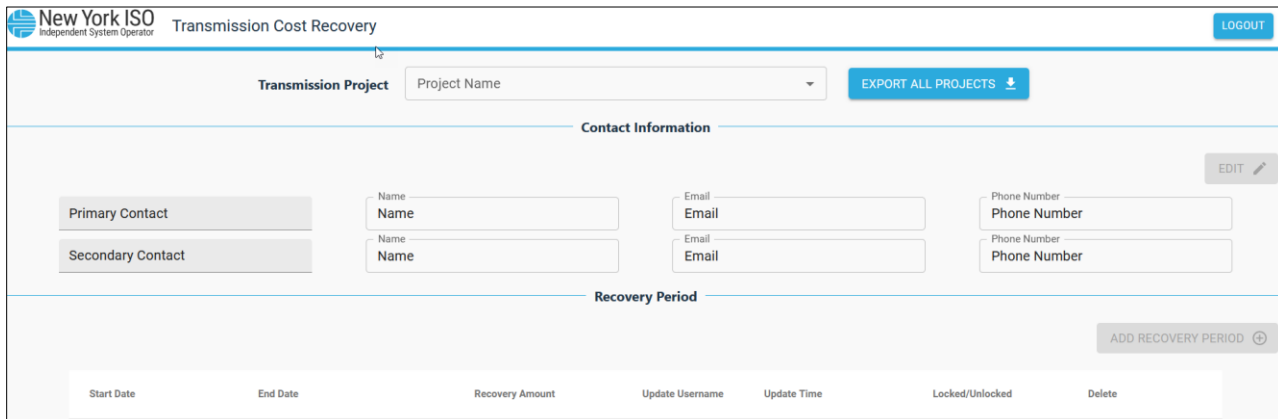


### 3.4. Export Recovery Period Information

The export function allows a user to export all applicable Recovery Period information associated with their Organization.

1. User selects **Export All Projects** on the Transmission Cost Recovery home page (Figure 13)

**Figure 13: Export All Projects**



The screenshot displays the 'Transmission Cost Recovery' web application interface. At the top left, the New York ISO logo and 'Independent System Operator' text are visible. The main header area includes the text 'Transmission Cost Recovery' and a 'LOGOUT' button. Below the header, there is a 'Transmission Project' section with a 'Project Name' dropdown menu and an 'EXPORT ALL PROJECTS' button with a download icon. The 'Contact Information' section is divided into 'Primary Contact' and 'Secondary Contact' tabs. Each tab has input fields for 'Name', 'Email', and 'Phone Number'. An 'EDIT' button with a pencil icon is located to the right of the contact fields. The 'Recovery Period' section at the bottom features an 'ADD RECOVERY PERIOD' button with a plus icon. Below this is a table with the following columns: Start Date, End Date, Recovery Amount, Update Username, Update Time, Locked/Unlocked, and Delete.

2. User has the option to “Open with” or “Save File”

## 4. Recovery Period Notifications

Based on the Primary and Secondary Contact selection outlined in Section 3.1, contacts will be notified via email based on the following circumstances around the individual Transmission Projects recovery period information.

### 4.1. Recovery Period Submission Notification

A “Submission Notification” is sent to the Primary and Secondary Contact via email after a Recovery Period is entered (Figure 14).

**Figure 14: Submission Notification**

The following regulated transmission project recovery period information has been submitted and accepted by the CSP:

Project Name:  
Recovery Period Start Date:  
Recovery Period End Date:  
Recovery Period Recovery Amount:  
Update User:

### 4.2. Recovery Period Deletion Notification

A “Deletion Notification” is sent to the Primary and Secondary Contact via email after a Recovery Period is deleted (Figure 15).

**Figure 15: Deletion Notification**

The following regulated transmission project recovery period information has been deleted:

Project Name:  
Recovery Period Start Date:  
Recovery Period End Date:  
Recovery Period Recovery Amount:  
Update User:

### 4.3. Recovery Period Entry Reminder Notification

An “Entry Reminder Notification” is sent to the Primary and Secondary Contact via email when an individual Transmission Project approaches the end of latest Recovery Period. The notification is sent 30

days prior, 14 days prior, and daily within 14 days of the Recovery Period end date for a project (Figure 16).

**Figure 16: Entry Reminder Notification**

The following regulated transmission project recovery period information is scheduled to end in X days:

Project Name:  
Recovery Period Start Date:  
Recovery Period End Date:  
Recovery Period Recovery Amount:

A new recovery period entry into the Customer Settlements Portal (CSP) is required at this time in order for the project to continue to receive cost recovery under the NYISO Open Access Transmission Tariff (OATT) beyond the recovery period indicated above.