

DER Aggregator Registration

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February 28, 2023

Agenda

- **Background & Overview**
- **Key Concepts & Manual Language**
- **Next Steps and DER Deployment Status**

Background & Overview

- **The Aggregator is the responsible party who represents one or more DER facilities as one or more Aggregations in the NYISO markets.**
- **As described in the NYISO’s June 27, 2019, DER Filing, NYISO Market Participants who wish to aggregate DER must be NYISO Customers:**
 - Services Tariff Sec. 4.1.10.5: “Aggregators must be Customers. Aggregators must (i) comply with the registration requirements set forth in Services Tariff Section 9, and the ISO Procedures; (ii) designate one or more contact persons to receive ISO communications; and (iii) comply with the metering requirements set forth in Services Tariff Section 13 and the associated ISO Procedures.”
- **In order to satisfy the tariff requirement, prospective Aggregators must complete:**
 - NYISO Customer Registration Packet, if not already registered
 - NYISO Aggregator Registration Packet
- **Existing NYISO Customers (E.g., DSASP Provider, or SCR Responsible Interface Party) that want to also participate as an Aggregator must still complete the NYISO Aggregator Registration Packet and all other associated requirements found in the Aggregation Manual.**
- **The NYISO currently expects to begin accepting NYISO Customer Registration and Aggregation Registration Packets by April 28, 2023.**

Background & Overview

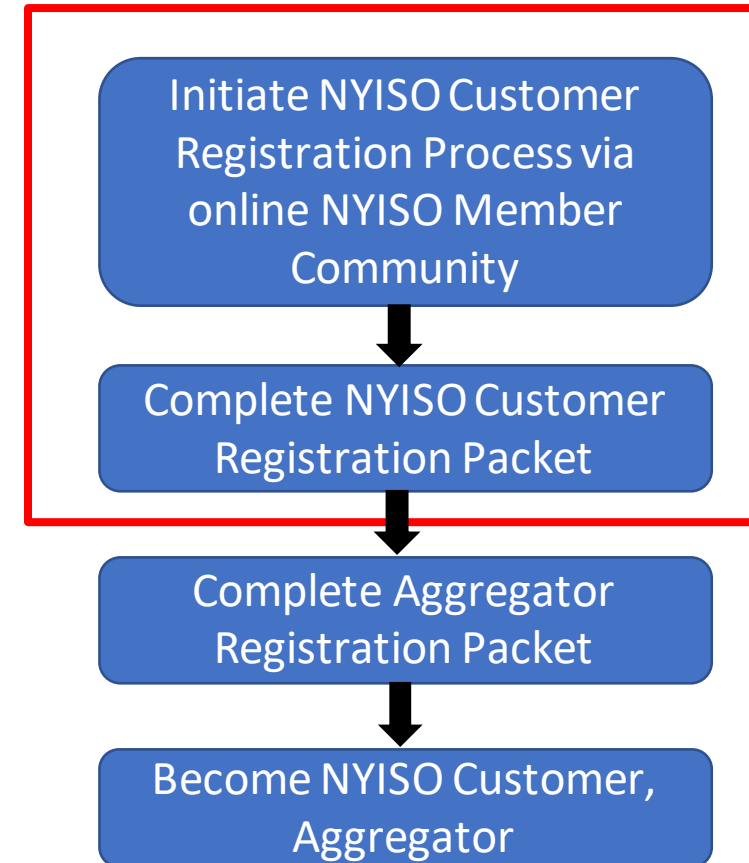
- The Aggregation Manual with incremental redlines reflecting the contents of today's presentation is posted with the meeting materials and also under the DER portlet section of the NYISO website:

<https://www.nyiso.com/manuals-tech-bulletins-user-guides>

Key Concepts & Manual Language

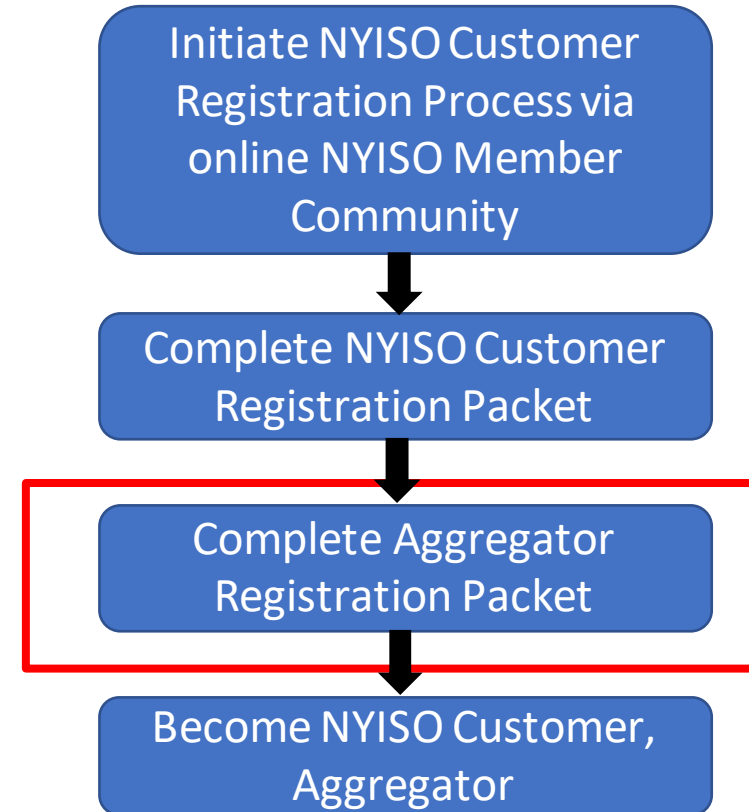
DER Aggregator Registration Process

- Prospective Aggregators should begin the registration process by accessing the NYISO Member Community.
- In parallel, the prospective Aggregator should review the requirements of Services Tariff Sec. 9 and the Market Participant User's Guide to complete all requirements pertaining to Organizations seeking Customer status, including but not limited to:
 - Submission of Credit information
 - Designation of MIS Administrators and users
 - Notification of corporate affiliations



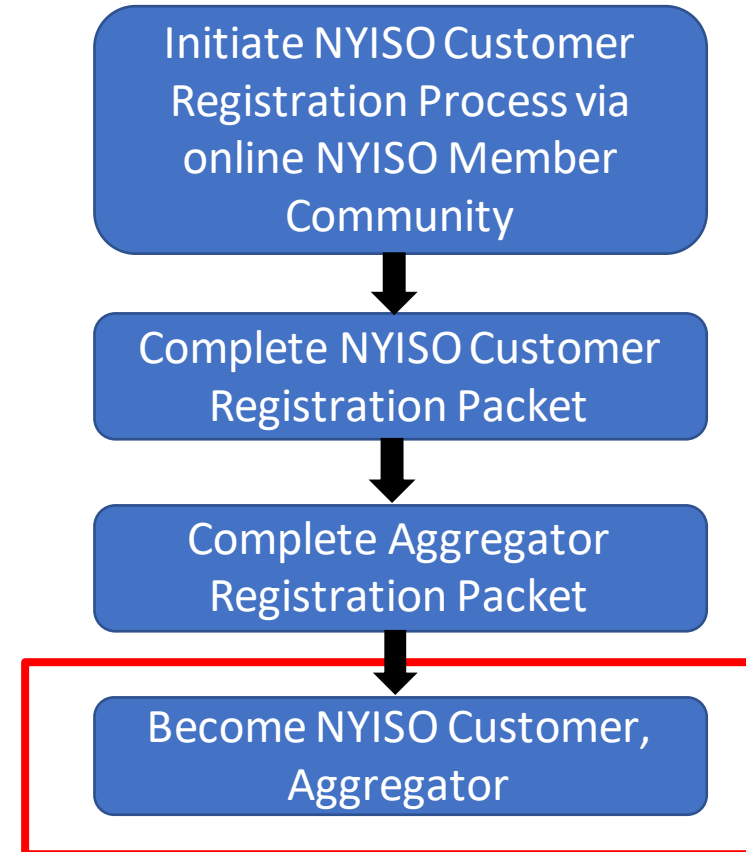
Aggregator Registration Process

- In addition to applicant information, the Aggregator is required to provide two 24/7/365 Operational Contacts – these individuals are responsible for responding to the NYISO at all times to support operational reliability.
- The Aggregator must acknowledge in the packet that a telemetry connection with the applicable Transmission Owner is needed before enrolling an Aggregation.
- The Aggregator Registration Packet also includes an Infrastructure & Technology Plan outline – this information is only necessary if the Aggregator intends to communicate directly with the NYISO, in addition to the required communication connection through the applicable TO.



Aggregator Registration Process

- Upon successful completion of the Customer Registration and Aggregator Registration Packets, an Aggregator will be established in the NYISO's Market Information System (MIS) based on the contact information provided in the aforementioned documents.
- NYISO intends to allow prospective Aggregators to submit the Customer Registration Packet and Aggregator Registration Packet beginning by April 28, 2023. Completed Applications will be reviewed, and NYISO staff will contact Aggregators if any changes are necessary. Aggregators will not have system privileges until the DER and Aggregation participation model is implemented.



Reminders

- An Aggregator may begin reviewing the applicable documentation now in preparation for the opening date of Aggregator Registration, but the NYISO will not begin accepting Aggregator registration packets until the currently expected April opening date.
- Each DER must have a complete Interconnection Agreement either from the NYISO's Small Generator Interconnection Process or a qualified non-NYISO process (E.g., NYS SIR), prior to being enrolled by an Aggregator in the Aggregation System.
 - Demand Side Resources seeking to enter an Aggregation are not required to have an Interconnection Agreement
- Telemetry connection to the NYISO should only be from the Aggregator's control center – the NYISO will not send or receive basepoints to individual DER either directly or through the applicable TO.
- Third Party Service providers of communication or scheduling/dispatch to an Aggregator must be registered as NYISO Customers or Guests prior to beginning service – please contact NYISO Customer Registration if the prospective Aggregator intends to contract with a Third Party for communication or scheduling/dispatch services (customer_registration@nyiso.com).
 - A qualified Meter Services Entity (MSE) is not considered a Third Party under the provisions of these contracts

Next Steps

Next Steps

- The NYISO will consider stakeholder feedback on the draft redlines in the Aggregation Manual included with today's meeting materials until March 3.
- Please send any questions that were not addressed during this presentation to: DER_Feedback@nyiso.com

DER Deployment Status

2023 DER Deployment Milestones

- **By April 28: NYISO expects to begin accepting Customer Registration for Aggregators.**
- **June/July: Tariff is expected to become effective; NYISO Aggregation System is anticipated to open for enrollment of DER and Aggregations.**
 - Tentative 'Day 1' of the DSASP 12-month transition period
- **Date of Enrollment + Workflow Reviews: Distribution Utility review and NYISO workflow begins upon submission of Aggregation and DER enrollment data to the Aggregation System; expected to take approximately 90 days.**

Manuals and Guides

- **The NYISO will return to present the following remaining manuals throughout Q1 and Q2 in preparation for DER deployment:**
 - Aggregation Manual – remaining Parts
 - Reference Level Manual
 - Accounting and Billing Manual
 - Revenue Metering Requirements Manual
 - ICAP Manual
 - Load Forecasting Manual – No updates since the 01/26/2023 ICAPWG – This document is considered ready for BIC
 - DADRP Manual – Not to be updated until retirement of DSASP and DADRP
- **User's Guides are not typically reviewed in Working Groups and are instead published for a stakeholder review period prior to final publication.**
 - The NYISO intends to publish the following User's Guides throughout Q1-Q2:
 - Aggregation System User's Guide
 - Market Participant User's Guide
 - GOCP User's Guide
 - Wind and Solar Plant Data User's Guide
 - RLS User's Guide
 - AMS Automated Market User's Guide
 - DRIS User's Guide – Not to be updated until retirement of DSASP and DADRP
- **The Direct Communications Procedure (CEII) is updated to reflect the DER participation model and is available for stakeholder request via stakeholder services online form request:**
 - <https://nyiso.tfaforms.net/187>

DER Training

■ NYISO Training Opportunities:

- Market Training
 - Comprehensive training programs for both DER Onboarding and DER Market Participation are currently under development and will be administered across late Q1 and into mid-Q2 2023
- Operations Training
 - The Spring System Operator Training Seminar (March 14 – April 21, 2023) will include an overview of the DER participation model and operation of the Grid Operations Communication Portal (GOCP).

Our Mission & Vision



Mission

Ensure power system reliability and competitive markets for New York in a clean energy future



Vision

Working together with stakeholders to build the cleanest, most reliable electric system in the nation

Questions?