

Aggregation Manual Updates

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April 27, 2023

Agenda

- **Background & Overview**
- **Updates to Aggregation Manual**
- **Next Steps**
- **DER Deployment Status**

Background & Overview

- **This presentation describes modifications to Aggregation Manual language in response to stakeholder feedback received during or immediately following the March 31 ICAPWG.**
 - NYISO provided an opportunity for feedback through close of business on April 7
- **All Aggregation Manual ‘parts’ will be combined into a single document for final stakeholder approval and publication**

Background & Overview

- The Aggregation Manual Parts 1 and 2 with incremental redlines reflecting the contents of today's presentation are 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>

Updates to Aggregation Manual –

3/31 ICAPWG Feedback & Responses

Aggregation Manual Part 1

■ Technical Bulletin 142 – Generator Audit

- Feedback: NYISO should consider incorporating Technical Bulletin 142 into a permanent manual, to support the references included in the Aggregation Manual.
- NYISO Response: The NYISO is not incorporating Technical Bulletin 142 in a NYISO manual prior to the deployment of the DER participation model. The NYISO may explore moving the contents of TB 142 into a manual at a later date.

Aggregation Manual Part 1 (continued)

■ Supplemental Resource Availability (SRA) Dual Participation

- Feedback: NYISO should clarify whether a TO must request an SRA for an Aggregation contracted to perform to satisfy a non-wholesale commitment.
- NYISO Response: An Aggregation containing one or more DER that participate in programs or markets operated to meet the needs of distribution systems located in the NYCA is required to notify the NYISO of its dual participation upon enrollment pursuant to the Market Participant User's Guide, and the Aggregation's offers in the NYISO-administered markets must be made in such a way that the Aggregation is scheduled by the NYISO when it operates to meet any non-wholesale commitments, pursuant to Services Tariff Section 4.1.11. A TO need not request an SRA for an Aggregation in order for that Aggregation to satisfy its non-wholesale commitment(s).
 - Minor supporting revisions included in the posted draft

■ DER Day Ahead Operating Plan Data

- Feedback: In NYISO's list of examples of information that the DU will require an Aggregator to submit for each DER's day ahead operating plan, the MW value of a service should be included as an example.
- NYISO Response: The NYISO will include this information.
 - Minor supporting revisions included in the posted draft

Aggregation Manual Part 2

- **CRIS and Demand Side Resources (DSR) Participating in an Aggregation**
 - Feedback: NYISO should clarify the requirements for DSRs seeking to participate in the Capacity market via an Aggregation that is an ICAP Supplier.
 - NYISO Response: A DSR need not obtain CRIS in order to participate in the Capacity market via an Aggregation that is an ICAP Supplier. A DSR's individual ICAP contribution to the Aggregation's ICAP will be based on the DMNC associated with that individual DSR, as well as its enrolled Demand Reduction MW capability.
 - Minor supporting revisions included in the posted draft
- **Third Party Service Provider – Customer Registration**
 - Removed '(except for Meter Services Entities)' to clarify that an MSE must register as a NYISO Customer or Guest in order to participate.
- **Dispute Resolution**
 - Feedback: NYISO should clarify whether the existing NYISO dispute resolution procedure shall be available to Aggregators seeking resolution of issues pertaining to the Distribution Utility review of DER for reliability and safety.
 - NYISO Response: Services Tariff Section 11 contains the NYISO's Dispute Resolution Procedures. These procedures, both formal and informal, are available to parties having a dispute under the ISO's Services Tariff and OATT, the ISO Procedures, or any Agreement entered into under either Tariff. Entities that seek to enroll a DER or Aggregation for participation in the NYISO's participation model will be able to utilize these procedures to resolve related concerns arising under the market rules under the Services Tariff and OATT.
 - Minor supporting revisions included in the posted draft
- **Aggregator Notification of Enrollment Data Exchange from NYISO to DU**
 - Feedback: NYISO should consider notifying an Aggregator when the enrollment data of the Aggregator's Aggregation(s) is shared with the applicable DU for review.
 - NYISO Response: The NYISO will provide the Aggregator with the results of the review upon receipt from the applicable DU. The NYISO cannot support notifying the Aggregator of data exchange for the initial deployment of the DER participation model. The Aggregator will have access to the Aggregation System to view enrollment status at all times and will receive email notification upon DU review completion and change of enrollment status.
- **NYISO and stakeholders identified several grammatical/structural edits throughout Part 2 – edits have been incorporated into the posted draft.**

Aggregation Manual Part 3

■ Telemetry Communication

- Feedback: The NYISO should permit Aggregators with an established telemetry connection directly to the NYISO to utilize said connection in lieu of a connection through the applicable TO, until the TO connection is established.
- NYISO Response: The NYISO is aware of Market Participant concerns regarding TO readiness to set up telemetry connections to Aggregator control centers in time for DER go-live. The NYISO is evaluating next steps in light of these concerns and will return to a future MIWG for further discussion with all stakeholders.

Next Steps

Next Steps

- The NYISO intends to review additional Aggregation Manual language at the ICAPWGs in May.
- 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.**
- **Tariff is expected to become effective after June 30 – enrollment of DER and Aggregations begins**
- **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 Q2 in preparation for DER deployment:**
 - Aggregation Manual – remaining content: Enrollment; DER/Aggregation definitions & program information
 - Reference Level Manual
 - ICAP Manual - remaining content: remaining Attachment J equations
- **User's Guides are not reviewed in Working Groups.**
 - The NYISO intends to publish the following User's Guides throughout 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>

NYISO DER Market Training Information

- Current target training schedule – ***Subject to change***

Training	Target Training Date(s)
GOCP Market Trials	April 26 – May 04
DER Onboarding Suite	June 16
GOCP Standalone Training	June 29
DER Bid-to-Bill Participation	June 29; August 14 – August 25
Annual Reliability-Based DR Course	October 10 – October 12
BTMNG Course	December 07

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?