

DER Participation Model – Draft Load Forecasting Manual Language

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Agenda

- **Background**
- **Discussion of LF Manual Updates – Section 3**
- **Next Steps**
- **Questions**

Background

- To support the deployment of the DER Participation Model, NYISO seeks stakeholder feedback of key concepts that will be included in NYISO Manuals, Guides, & Technical Bulletins.
- Before NYISO seeks approval of draft manual language, stakeholder input on the concepts must be solicited and captured in the documents by staff.
- Today's discussion will review the concepts pertaining to interconnection data requests
- Concepts are presented first, followed by draft manual language for stakeholder consideration.
 - Please note: The ISO Procedures in existing Manuals are generally applicable to Resources including Aggregations
 - This discussion focuses on concepts that specifically apply to Aggregators and Transmission Owners

Background

- **NYISO Load Forecasting Manual changes are being proposed primarily to include updates for addressing DER Aggregation participation in the NYISO Markets**
- **These updates include associated procedures required for forecasting the impact of DER projects for the Day-Ahead and ICAP Market Load forecasts (The ICAP forecast is reviewed and discussed by the NYISO Load Forecasting Task Force stakeholder working group)**

History of Recent LF Manual Discussions:

- **Reviewed drafted updates and modified with the Load Forecasting Task Force (LFTF) in November of 2022:**
 - November 4, 2022 - LFTF: Draft Manual Language Proposed (Link)
- **Reviewed with the Installed Capacity and Market Issues Working Groups (ICAPWG/MIWG) in January 2023:**
 - January 26, 2023 - ICAPWG/MIWG: Manual Language Reviewed (Link)

Key Area for Discussion

- **Three main areas of revisions are:**
 1. Data submission requirements for DER Aggregators in support of the annual ICAP Market Peak Load Forecast.
 2. Data submission requirements for the Transmission Owners (TOs) in order to improve project tracking of DER facilities (i.e., new resources and changes to existing resources) in the New York Control Area and to assist in the registration of DER facilities in an Aggregation.
 3. Incorporate ICAP Market Peak Load Forecasting methodology updates to account for DER Aggregator participation (i.e., accounting for the impacts of resources transitioning to and from DER aggregations).
- **Today's discussion is focused on TO, Aggregator and NYISO Data Exchanges and the review process (Item 2 noted above and Section 3 of the LF Manual)**

Summary of LF Manual Updates

■ Section 3

- New section outlining the data requests for Utility Interconnection Project data and Aggregator data review

■ Section 3.1

- Data request and the information provided by the NYISO to the TOs for resource location tracking

■ Section 3.2

- Data requested for each non-NYISO Interconnection Project from the TOs and the DER Aggregators and related due dates

■ Section 3.3

- Data review and update timeline

Section 3.1

- For DER facilities that are both wholesale market participating and non-wholesale market (i.e., retail load-modifying resources), NYISO will request project interconnection information from the applicable Transmission Owner
- For Energy Rights Interconnection Service (ERIS) only projects¹, NYISO will request confirmation from the DER Aggregators for DER facilities that will be market participating
- On an annual basis, the NYISO will provide the following information to the Transmission Owners:
 - A listing of valid counties and zip-codes that intersect each Transmission District's service territories.
 - The NYISO may update and re-post this data quarterly if significant changes to NY regional zip-codes warrant an update

¹ – For Capacity Rights Interconnection Service (CRIS) projects, Aggregators must follow the NYISO interconnection procedures to register a DER facility in the NYISO markets

Section 3.2

- **TOs shall provide to the NYISO updates to new and existing TO interconnected DER facilities on a monthly basis. DER Aggregators will review each facility they wish to enroll in an Aggregation. Data shall be submitted by the 20th of each month or the closest business day.**
- **The following classes of information are requested for each TO interconnected DER facility:**
 - Project Identification Number
 - Locational Information
 - Electrical Connectivity Information
 - Project Timeline and Facility Status
 - DER Generator Type and Capacity Information
- **The New York State Department of Public Service (DPS) Standard Interconnection Request¹ Dataset provides all the fields required for submission to the NYISO. The SIR does not provide information on projects that fall outside the SIR and NYISO interconnection processes.**

¹ - <https://dps.ny.gov/distributed-generation-information>

Section 3.2 – Project Information Requested

The following information will be requested from the TOs:

Project Field Name	Description	SIR Field (Y/N)	Notes / Validations
Synchronization Date	Project completion date	Y	Commercial Operation Date
Max Summer Net (ERIS)	Maximum net Summer output (kW AC)	N ¹	Nameplate value in SIR
Max Winter Net (ERIS)	Maximum net Winter output (kW AC)	N ¹	Nameplate value in SIR
Project Status	Project Status	N ²	Completed Projects Only
SIR Job Number	Project ID Number	Y	Unique project identifier
Circuit ID	Project Circuit ID	Y	
Nameplate KW AC	Project Nameplate Output (kW AC)	Y	Sum of asset types
Hybrid Facility	Hybrid Project Indicator (Y/N)	Y	
Asset Type Information	Project resource types (PV, ESS, WIND, other)	Y	Up to 4 types per project
Asset Type kW AC	Nameplate of output for each type (e.g., PV kW AC, ESS kW AC, other)	Y	Up to 4 capacities per project
Metering	Metering Type (e.g., Net Metering, Remote Net Metering, CGD, FIT)	Y	Valid SIR Metering Type
NYISO Zone	Project NYISO Load Zone	Y ³	Valid NYISO Zone (A through K)
County	Project County	Y ³	Must be a valid NY County
Zip Code	Project Zip Code	Y	Must be a valid NY Zip Code
Application Date	Project application date (initial application date)	Y	May not be available for older projects

1 – Same as the project nameplate value

2 – Only completed projects will be requested

3 – This information is now part of the SIR data set beginning with

the June 2022 SIR submissions (May 2022 project data)



Section 3.2 – Project Information Review

The following information will be presented to the Aggregators for review/confirmation during the project enrollment process:

Project Field Name	Description	SIR Field (Y/N)	Notes / Validations
Max Summer Net (ERIS)	Maximum net Summer output (kW AC)	N ¹	Aggregator reviews value
Max Winter Net (ERIS)	Maximum net Winter output (kW AC)	N ¹	Aggregator reviews value
Project Status	Project Status	N ²	Aggregator reviews value
SIR Job Number	Project ID Number	Y	Unique identifier
Nameplate KW AC	Project Nameplate Output (kW AC)	Y	Aggregator reviews value

- 1 - Matches project nameplate information
- 2 - Only completed projects will be requested

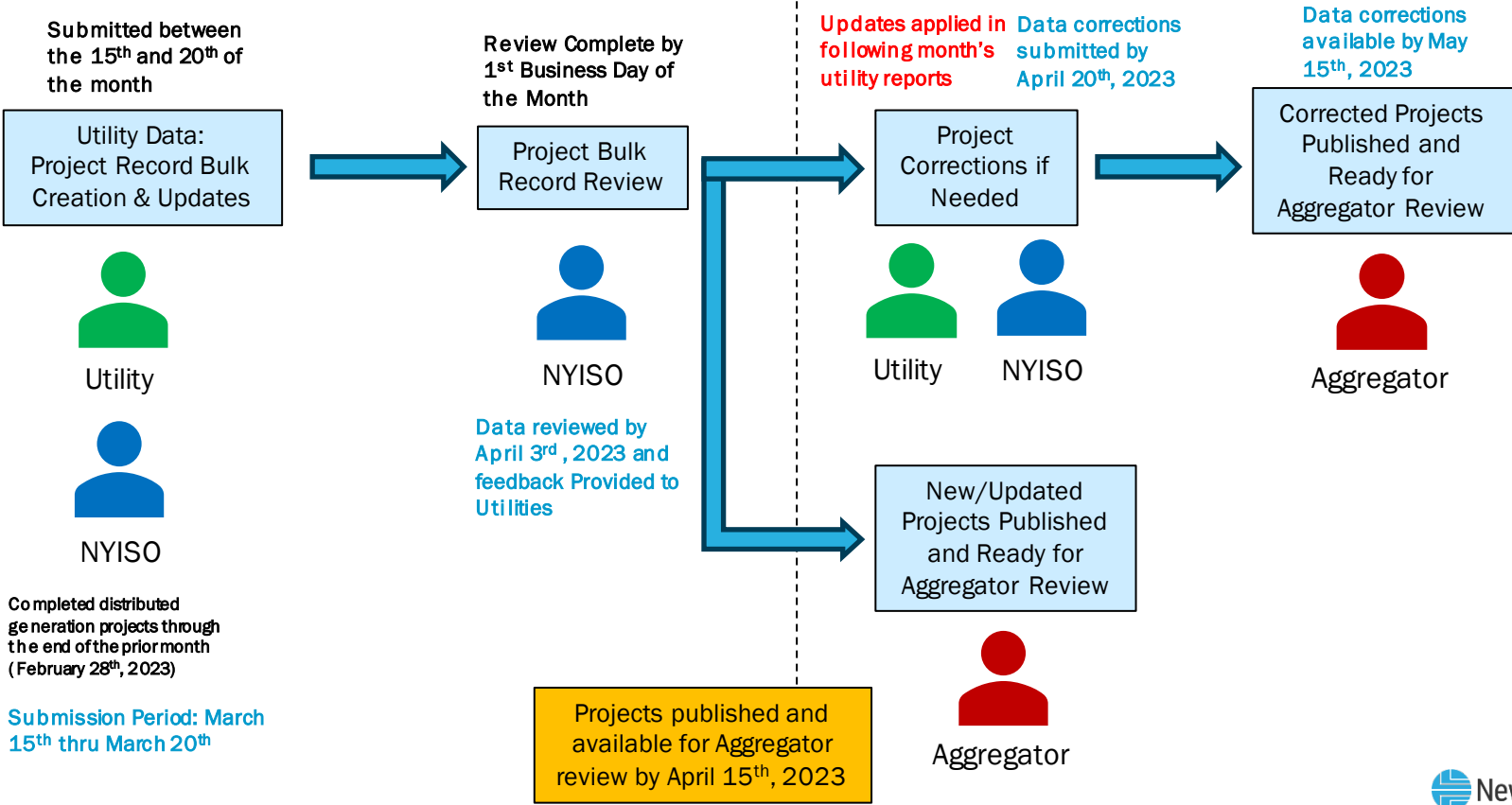
Section 3.2

- The following table provides example timelines for the DER data submissions:

Interconnection Data Reporting Period (Projects completed within the month of)	Data Submission Period Date
January	February 15th through February 20 th
February	March 15th through March 20 th

Non-NYISO Project (ERIS) – Updated Monthly Input Timeline

Example dates shown below are for review of new and updated/corrected utility project interconnection data available through the end of February 2023



Section 3.3

- **After a successful submission/upload of the data, the NYISO will review and perform basic information integrity and consistency checks on the data and complete them by the first business day of the month**
- **NYISO feedback on the submissions will also occur by the first business day of the month and be communicated via email and the NYISO Salesforce website – DER Information Community (DERIC)**
- **The TOs will then have until the next monthly reporting period or within 30 days, whichever comes first, to clarify the information and/or provide updates to the DER facility information in question**
- **Notifications on the review and approval will be communicated via email and in DERIC**

Section 3.3 – Review Timeline

- The following table provides example timelines for the DER data reviews by NYISO:

Interconnection Data Reporting Period (Projects completed within the month of)	Data Submission Period	NYISO Data Review Complete
January	February 15th through February 20th	1st business day of March
February	March 15th through March 20th	1st business day of April

Section 3.3 – DER Project Monthly Data Review/Update Process

1. TOs upload new and updated/corrected project information to the NYISO Salesforce DER Information Community (DERIC) portal. Email submissions of the data will also be accepted. Information is due on the 20th of the month for projects completed/updated during the prior month. [\[March 20th, 2023 - for projects completed in February 2023\]](#)
2. NYISO performs review of new and updated project information and communicates results back to utility group - Feedback is submitted by the 1st business day of the month after the submissions. [\[April 3rd, 2023\]](#)
3. NYISO publishes projects to DERIC portal community users [\[April 15th, 2023\]](#)
4. TOs provide updates to records and include in the following month's submissions [\[April 20th, 2023; Updates to February 2023 project submissions along with March 2023 project updates\]](#)
5. Aggregator accesses DERIC and reviews projects for formation in an Aggregation
6. Aggregator enters projects into the NYISO Aggregation System for Aggregation formation
7. Aggregator and NYISO resolve any discrepancies with project facility information during the TO data review period during enrollment (monthly update process in Steps 1-3 above will be followed to publish updates in the DERIC system)

[\[Example Timeline Dates from Prior Slide\]](#)  New York ISO

Load Forecasting Manual Updates - Next Steps

- NYISO to present LF Manual updates for approval at an upcoming Business Issues Committee meeting
- NYISO will post any subsequent revisions to redlined documents on the website: [Manuals, Tech Bulletins & Guides – NYISO](#)
 - See special section: DER Project Documents Under Review
- Please send any questions, comments, or feedback that were not addressed during this presentation to both:
DER_Feedback@nyiso.com and Demand_Forecasting@nyiso.com
 - Comments/feedback submitted to the NYISO will be posted publicly unless the NYISO is specifically asked not to do so.

Questions?

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