

Aggregation System Training

Intended for Distributed Energy Resource (DER) and Aggregation Participation Model

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Market Training, NYISO

DER and Aggregation Participation Model
eLearning Module

Presentation Topics

- **Introduction to the Agg System**
 - Access to the Agg System
- **Enrollment of new Aggregations and facilities**
 - Submission of facilities and Aggregation Enrollment
 - Initial NYISO Validation
 - Distribution Utility Review
 - NYISO Review
 - Post Enrollment Setup for Participation
- **Enrollment tasks for Installed Capacity Market Participation**
 - DMNC submission and validation
- **Management of Enrollments**
 - Separating an Aggregation/facility
 - ICAP Market related tasks
- **Additional References**

Introduction to the Agg System

Disclaimer

- A test organization has been used to illustrate Agg System features and functionalities and how market participants can use the interface
 - Aggregations, Aggregation ID, Facility ID etc. have been system generated exclusively for training use, and the information on the slides do not indicate any current Market Participant or organization

Introduction to the Agg System

- **NYISO's Agg System**
 - Objective and function: Online interface for enrollment of Aggregations and DER for participation in NYISO's markets and management of enrollment of Aggregations
 - Designated personnel from the Aggregator organization will have access to the Aggregation System
 - Aggregation enrollments may be submitted on a monthly basis
- **Agg System User Roles:**
 - Agg System MP User
 - Agg System MP Read Only

Functionalities of the Agg System

- Enrollment for Energy and Ancillary Services Participation
- Enrollment for Installed Capacity Market Participation
- Management of Enrollments
 - Modification of facility/Aggregation level attributes
 - Separating Aggregations/removing facilities
 - Facilities swapping between Aggregations
 - Transition of existing resources to the DER and Aggregation Participation Model
 - **Special Case Resources (SCRs)**
 - **Stand-alone Generators**

Pre-requisites for Agg System Access

- Completion of two-part Registration process
 - NYISO Customer Registration
 - Aggregator Registration



- For further understanding of these processes,
 - Refer to the [NYISO Customer and Aggregator Registration module of the DER Onboarding Education Suite on the Online Learning page of the NYISO website](#)
 - [Section 4 of the Aggregation Manual](#)

User Requirements

- MIS Privileges:
 - Organization level privileges set up after completion of Customer and Aggregator Registration process
 - Assigned by NYISO
 - User level privileges assigned to MIS account
 - Assigned by organization's MIS Administrator
- Digital Certificate:
 - Valid NAESB Digital Certificate Required
 - Installed on respective computer
 - For details on how to obtain the certificate, refer to the [NAESB Digital Certificate Tutorial on the Online Learning page of the NYISO Website](#)

User Requirements

Hardware Requirements

	Recommended	Optimal
Graphic Memory (GPU)	512 MB of GDDR4 or higher	2GB GDDR5 or higher
Processor	(4 MB cache, 4 cores, 4 threads) or higher	(6 MB cache, 4 cores, 8 threads) or higher
RAM	8 GB	16 GB
HDD	SSD	M.2 SSD

Software Requirements

Product	Recommended
Operating System	64-bit
Browser	<ul style="list-style-type: none"> - Up to date version of a common internet browser - Internet Explorer will not be supported
CSV/Excel	Spreadsheet application

Network Specifications

	Recommended	Optimal
Network Connectivity	T1 Internet connection	OATInet or other private network connection

Access to the Agg System

[About Us](#) ▾[Grid of the Future](#) ▾[Careers](#) ▾[Calendar](#)[Support](#) ▾[Login](#) ▾[MARKETS](#) ▾[LIBRARY](#) ▾[PLANNING](#) ▾[COMMITTEES](#) ▾[TRAINING](#) ▾

REAL-TIME DATA DASHBOARD

SYSTEM CONDITIONS

ENERGY MARKET & OPERATIONAL DATA

[Pricing Data](#)[Power Grid Data](#)[Load Data](#)[Reports & Info](#)[Postings by Date](#)[Custom Reports](#)[Ancillary Services](#)[Emissions Data](#)

INSTALLED CAPACITY MARKET (ICAP)

[Capacity Accreditation](#)

TRANSMISSION CONGESTION CONTRACTS (TCC)

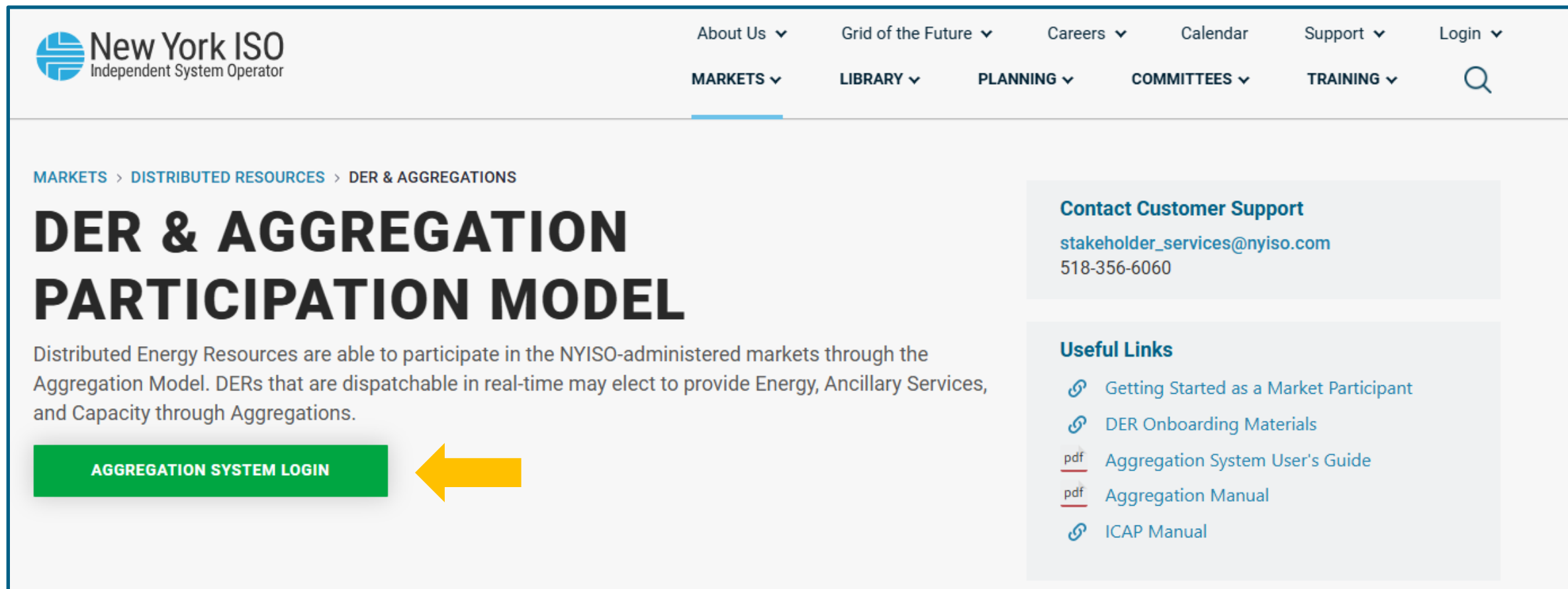
DISTRIBUTED RESOURCES

[DER & Aggregations](#)[Demand Response](#)[Behind-the-Meter Net Generation](#)

MARKET ACCESS LOGIN



Access to the Aggregation System



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MARKETS > DISTRIBUTED RESOURCES > DER & AGGREGATIONS

DER & AGGREGATION PARTICIPATION MODEL

Distributed Energy Resources are able to participate in the NYISO-administered markets through the Aggregation Model. DERs that are dispatchable in real-time may elect to provide Energy, Ancillary Services, and Capacity through Aggregations.



AGGREGATION SYSTEM LOGIN ←


Contact Customer Support
stakeholder_services@nyiso.com
518-356-6060


Useful Links

- [Getting Started as a Market Participant](#)
- [DER Onboarding Materials](#)
- [pdf Aggregation System User's Guide](#)
- [pdf Aggregation Manual](#)
- [ICAP Manual](#)

Access to the Agg System

 **New York ISO**
Independent System Operator LOGIN 

Please login to continue to the Aggregation System
LOGIN 





**Please sign in
(customized)**

Username

Password


Sign in




 **New York ISO**
Independent System Operator **Aggregation System** ▾ MPUSER_1
LOGOUT 

Welcome to the Aggregation System.

Agg System – General Navigation


New York ISO
Independent System Operator

Aggregation System ▾

MPUSER_1
LOGOUT 

Transmission Nodes

PTID	Name	TO	Start Date	Location Name	Load Pocket
355582	NCHELSEA_115KV_TR2	CHG&E	01/01/2023	NCHELSEA	
55870	HELLGATE_13_KV_LD	CONED	01/01/2023	HELLGATE	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23322 ASTORIA WEST - QUEENSBRIDGE,23323 ASTORIA WEST QUE
80602	PLSNTVLE_13_KV_13.8KVDIST	CONED	01/01/2023	PLSNTVLE	
355505	JAMAICA_27_KV_LOAD	CONED	01/01/2023	JAMAICA	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23321 ASTORIA EAST - COR- JAMAICA
355998	BENSHRST_27_KV_BENSHRST_1	CONED	01/01/2023	BENSHRST	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23325 VERNON - GREENWOOD,23332 GREENWOOD - STATEN ISLA
356117	W50THST_13_KV_LOAD	CONED	01/01/2023	W50THST	23320 DUNWOODIE SOUTH
356125	BROWNSV1_27_KV_LOAD	CONED	01/01/2023	BROWNSV1	23320 DUNWOODIE SOUTH
356172	GLENDALE_27_KV_LOAD	CONED	01/01/2023	GLENDALE	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23322 ASTORIA WEST - QUEENSBRIDGE,23325 VERNON - GR
356214	E179THST_13_KV_LOAD	CONED	01/01/2023	E179THST	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138
356215	WHITEPLN_13_KV_LOAD	CONED	01/01/2023	WHITEPLN	
356217	MILLWOOD_13_KV_LOAD	CONED	01/01/2023	MILLWOOD	
356241	CHERRYST_13_KV_LD	CONED	01/01/2023	CHERRYST	23320 DUNWOODIE SOUTH,23334 EAST RIVER
356247	N.QUEENS_27_KV_LOAD	CONED	01/01/2023	N.QUEENS	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23321 ASTORIA EAST - COR- JAMAICA
356253	FRESHKLS_33_KV_LOAD	CONED	01/01/2023	FRESHKLS	23320 DUNWOODIE SOUTH,23333 STATEN ISLAND
356306	ROCKVIEW_13_KV_LD	CONED	01/01/2023	ROCKVIEW	
55734	WATSON__69_KV_BK 1	LIPA	01/01/2023	WATSON	
55738	GREENLWN_69_KV_BK 3	LIPA	01/01/2023	GREENLWN	
55787	N.BELMOR_69_KV_BK1	LIPA	01/01/2023	N.BELMOR	
55790	BROOKVLE_69_KV_TB1	LIPA	01/01/2023	BROOKVLE	
55809	SOUTHOLD_69_KV_BK 2	LIPA	01/01/2023	SOUTHOLD	
55817	TIANA__69_KV_BK 1	LIPA	01/01/2023	TIANA	
55828	HEWLETT__69_KV_BK3	LIPA	01/01/2023	HEWLETT	

Full dataset
Current page dataset

< > >> Page 1 of 2 | Go to page:

Click the down arrow icon to display the Search feature

Click here to Logout of the Agg System

Several reports and screens may need the scroll bar to access all the information

Current page data set or Full dataset can be exported for analysis

Several reports and screens may need the scroll bar to access all the information

Several reports have multiple pages, that can be accessed by clicking these navigation buttons

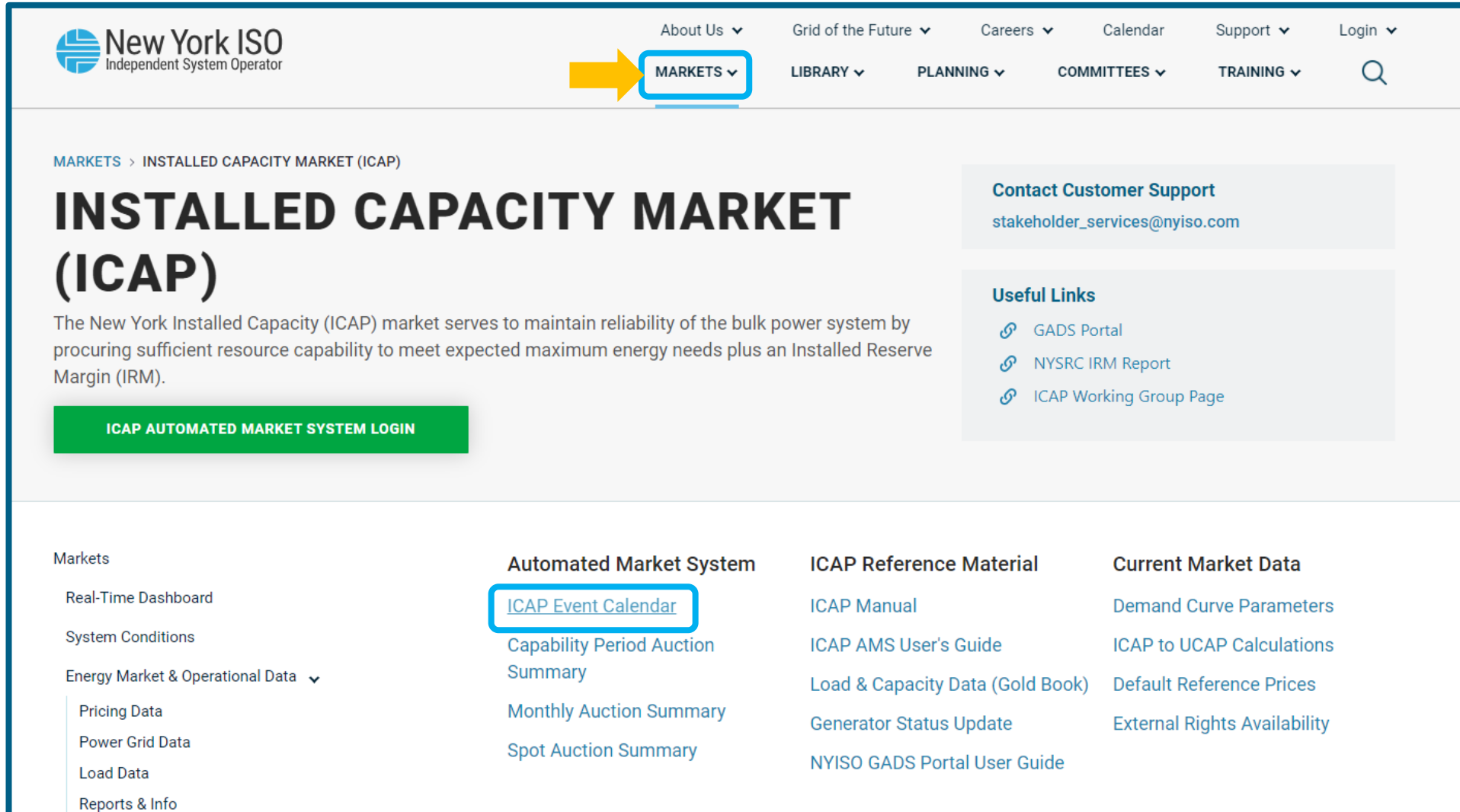
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FOR TRAINING PURPOSES ONLY

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ICAP Event Calendar for Agg System

Deadlines



The screenshot shows the New York ISO website's navigation menu with 'MARKETS' highlighted by a yellow arrow and a blue box. Below the navigation, the 'INSTALLED CAPACITY MARKET (ICAP)' page is displayed. The page features a green button for 'ICAP AUTOMATED MARKET SYSTEM LOGIN' and a 'Useful Links' section with links to 'GADS Portal', 'NYSRC IRM Report', and 'ICAP Working Group Page'. At the bottom, a grid of links is shown, with 'ICAP Event Calendar' highlighted in a blue box under the 'Automated Market System' category.

New York ISO
Independent System Operator

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MARKETS > INSTALLED CAPACITY MARKET (ICAP)

INSTALLED CAPACITY MARKET (ICAP)

The New York Installed Capacity (ICAP) market serves to maintain reliability of the bulk power system by procuring sufficient resource capability to meet expected maximum energy needs plus an Installed Reserve Margin (IRM).

[ICAP AUTOMATED MARKET SYSTEM LOGIN](#)

Contact Customer Support
stakeholder_services@nyiso.com

Useful Links

- [GADS Portal](#)
- [NYSRC IRM Report](#)
- [ICAP Working Group Page](#)

Markets

- Real-Time Dashboard
- System Conditions
- Energy Market & Operational Data ▾
 - Pricing Data
 - Power Grid Data
 - Load Data
 - Reports & Info

Automated Market System

- [ICAP Event Calendar](#)
- Capability Period Auction Summary
- Monthly Auction Summary
- Spot Auction Summary

ICAP Reference Material

- ICAP Manual
- ICAP AMS User's Guide
- Load & Capacity Data (Gold Book)
- Generator Status Update
- NYISO GADS Portal User Guide

Current Market Data

- Demand Curve Parameters
- ICAP to UCAP Calculations
- Default Reference Prices
- External Rights Availability

ICAP Event Calendar for Agg System Events

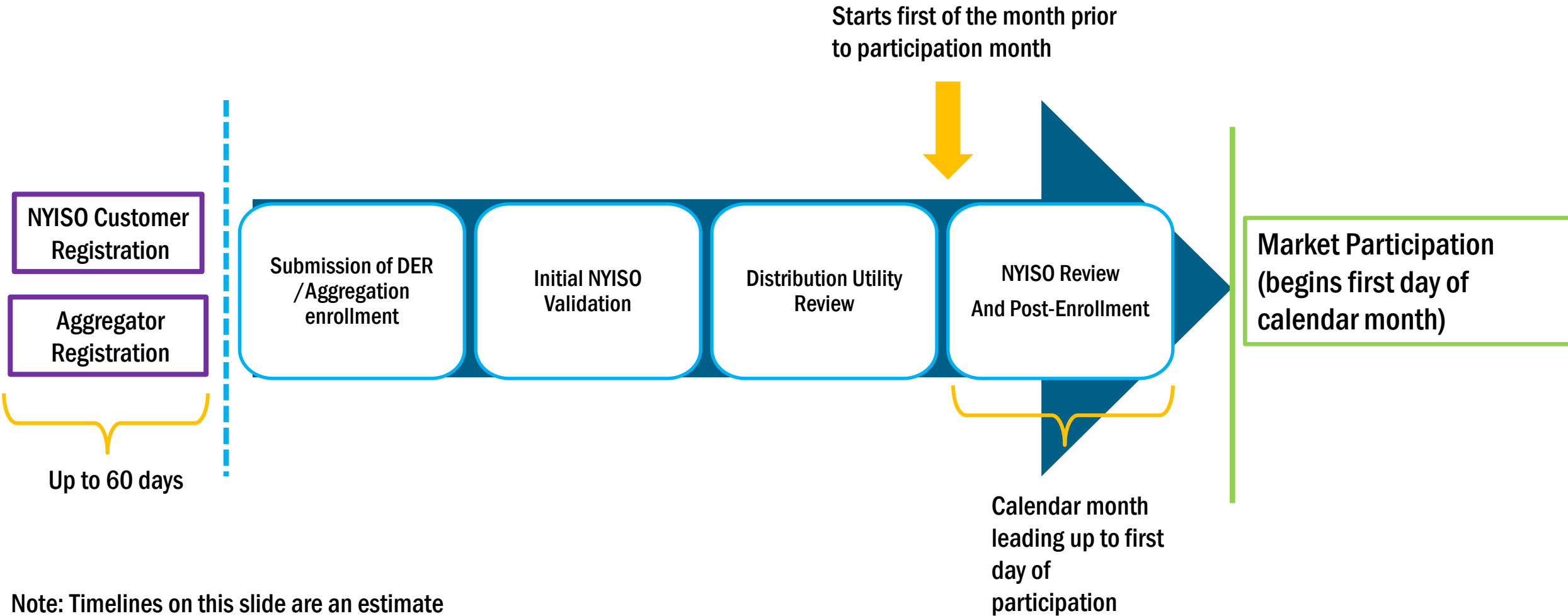
10:50 AM	test - GLOBAL_All Calendars - EvtResp INT-1
01:50 PM	test - GLOBAL_All Calendars - EvtResp INT-1
05:00 PM	IMPORT RIGHTS - ISO posts the remaining available Import Rights
05:00 PM	UCRs - ISO provides UCRs to LSEs
Wednesday Aug 09, 2023	
03:13 PM	CERTIFICATION - Deadline for Certification for LSEs and Suppliers for Jun
03:18 PM	CERTIFICATION - Deadline for Certification for LSEs and Suppliers for Apr
03:24 PM	CERTIFICATION - Deadline for Certification for LSEs and Suppliers for Apr
05:00 PM	AFFILIATES - Deadline to request additions/deletions to affiliate list of new org names for Sep
05:00 PM	SCR - Enrollment Period for auction month of May Closes
Thursday Aug 10, 2023	
08:00 AM	MONTHLY AUCTION - Offer period opens for Sep Monthly Auction
11:15 AM	AGG ENROLLMENT - Enrollment for Month - Sept 2023 Closes
12:10 PM	AGG ENROLLMENT - Enrollment for Month - Oct 2023 Opens
Friday Aug 11, 2023	
11:10 AM	CERTIFICATION - Certification Period begins for LSEs and Suppliers for Oct
05:00 PM	DMNC - Deadline to submit DMNC data for Existing Generators to ensure can be used for Oct
05:00 PM	MONTHLY AUCTION - Offer period closes for Sep Monthly Auction
Tuesday Aug 15, 2023	
10:38 AM	MONTHLY AUCTION - Bid period opens for Sep Monthly Auction
05:00 PM	IMPORT RIGHTS - ISO posts the remaining available Import Rights after Monthly auction
05:00 PM	MONTHLY AUCTION - ISO posts results of Sep Monthly Auction
Wednesday Aug 16, 2023	
08:00 AM	IMPORT RIGHTS - First Come First Serve - begin to submit requests
05:00 PM	AFFILIATES - Deadline to select or de-select affiliate names for Sep ICAP Market
05:00 PM	IMPORT RIGHTS - First Come First Serve - deadline to submit requests
Thursday Aug 17, 2023	
08:00 AM	IMPORT RIGHTS - First Come First Serve - begin to confirm requests
05:00 PM	IMPORT RIGHTS - First Come First Serve - deadline to confirm requests

Enrollment of New DER and Aggregations

Pre-Enrollment Checklist

<p>Interconnection Agreement</p>	<ul style="list-style-type: none"> • All individual DER facilities that will inject Energy onto a distribution system or the transmission system must have a signed Interconnection Agreement; either through: <ul style="list-style-type: none"> • NYISO’s Standard Interconnection Procedure, or • Acceptable non-NYISO Interconnection procedure (<i>e.g.</i>, through the local distribution utility)
<p>Telemetry Communication</p>	<ul style="list-style-type: none"> • Aggregator must successfully establish telemetry infrastructure connection with the applicable Member System, and optionally to NYISO, prior to Enrollment in the Agg system • Aggregator to Member System connection is a pre-requisite to the Enrollment process
<p>Transmission node selection confirmation</p>	<ul style="list-style-type: none"> • Aggregator must obtain confirmation of their Transmission node selection from the applicable Transmission Owner, prior to enrollment, in order to submit proof to the NYISO
<p>Utility pre-enrollment/registration process</p>	<ul style="list-style-type: none"> • Aggregators may obtain information and data from their applicable distribution utility to support its enrollment of DERs with NYISO <ul style="list-style-type: none"> • Examples: Non-NYISO Interconnection Agreement information from DU records • The applicable DU must be contacted for details on potential access to information

Overview of Enrollment Process in Agg System



Note: Timelines on this slide are an estimate

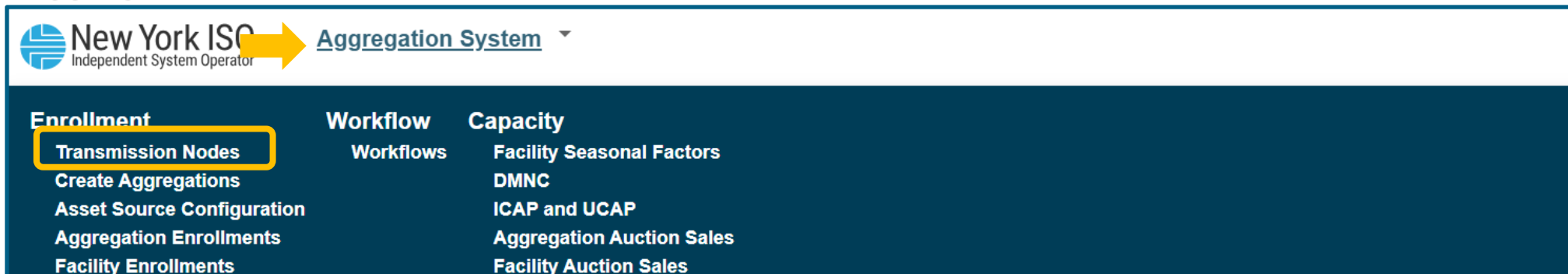
Enrollment and Participation Timeline

- **New DER and Aggregations**
 - Energy and Ancillary Services market participation: 1st month after NYISO Review and successful enrollment
 - Installed Capacity Market Participation: 1 month after Energy market participation onwards
 - DMNC tests must be submitted and validated prior to participation start
- **Existing resources transitioning into the DER and Aggregation Participation model**
 - Energy and Ancillary Services market participation: 1st month after NYISO Review and successful enrollment
 - Installed Capacity Market Participation: Can start 1st month after NYISO Review and successful enrollment
 - If DMNC/provisional DMNC is submitted and validated during the month of NYISO Review

Submission of Facility/Aggregation Enrollment

Available Reports and Tables

- Aggregations can view the list of available Transmission Nodes in this report
- Transmission Node: Point on the NYS Transmission System at which LBMP will be calculated for the Aggregation
 - For an Aggregation, Transmission Nodes reflect a collection of designated load buses on which individual DERs are located and participate together in an Aggregation
- The Transmission Nodes Report contains a list of available and active Transmission Nodes
 - Contains TO, Zone, Subzone, load pocket and Station name information
 - Aggregations can select the Transmission Node that they will electrically map to
 - Aggregators must select PTIDs specific to their applicable Transmission nodes to obtain Aggregation ID



New York ISO Independent System Operator **Aggregation System** ▾

Enrollment	Workflow	Capacity
Transmission Nodes	Workflows	Facility Seasonal Factors
Create Aggregations		DMNC
Asset Source Configuration		ICAP and UCAP
Aggregation Enrollments		Aggregation Auction Sales
Facility Enrollments		Facility Auction Sales



Transmission Nodes

PTID	Name	TO	Start Date	End Date	Station Name	Load Pocket
355582	NCHELSEA_115KV_TR2	CHG&E	01/01/2023		NCHELSEA	
55870	HELLGATE_13_KV_LD	CONED	01/01/2023		HELLGATE	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23322 ASTORIA WEST - QUEENSBRIDGE,23323 ASTORIA WEST QUE
80602	PLSNTVLE_13_KV_13.8KVDIST	CONED	01/01/2023		PLSNTVLE	
355505	JAMAICA__27_KV_LOAD	CONED	01/01/2023		JAMAICA	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23321 ASTORIA EAST - COR- JAMAICA
355998	BENSHRST_27_KV_BENSHRST_1	CONED	01/01/2023		BENSHRST	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23325 VERNON - GREENWOOD,23332 GREENWOOD - STATEN ISLA
356117	W50THST__13_KV_LOAD	CONED	01/01/2023		W50THST	23320 DUNWOODIE SOUTH
356125	BROWNSV1_27_KV_LOAD	CONED	01/01/2023		BROWNSV1	23320 DUNWOODIE SOUTH
356172	GLENDALE_27_KV_LOAD	CONED	01/01/2023		GLENDALE	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23322 ASTORIA WEST - QUEENSBRIDGE,23325 VERNON - GREENW
356214	E179THST_13_KV_LOAD	CONED	01/01/2023		E179THST	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138
356215	WHITEPLN_13_KV_LOAD	CONED	01/01/2023		WHITEPLN	
356217	MILLWOOD_13_KV_LOAD	CONED	01/01/2023		MILLWOOD	
356241	CHERRYST_13_KV_LD	CONED	01/01/2023		CHERRYST	23320 DUNWOODIE SOUTH,23334 EAST RIVER
356247	N.QUEENS_27_KV_LOAD	CONED	01/01/2023		N.QUEENS	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23321 ASTORIA EAST - COR- JAMAICA
356253	FRESHKLS_33_KV_LOAD	CONED	01/01/2023		FRESHKLS	23320 DUNWOODIE SOUTH,23333 STATEN ISLAND
356306	ROCKVIEW_13_KV_LD	CONED	01/01/2023		ROCKVIEW	
55734	WATSON__69_KV_BK 1	LIPA	01/01/2023		WATSON	
55738	GREENLWN_69_KV_BK 3	LIPA	01/01/2023		GREENLWN	
55787	N.BELMOR_69_KV_BK1	LIPA	01/01/2023		N.BELMOR	
55790	BROOKVLE_69_KV_TB1	LIPA	01/01/2023		BROOKVLE	
55809	SOUTHOLD_69_KV_BK 2	LIPA	01/01/2023		SOUTHOLD	
55817	TIANA__69_KV_BK 1	LIPA	01/01/2023		TIANA	
55828	HEWLETT_69_KV_BK3	LIPA	01/01/2023		HEWLETT	
55846	BELLMORE_69_KV_BK 2	LIPA	01/01/2023		BELLMORE	
56701	BRENTWOD_69_KV_BK_1	LIPA	01/01/2023		BRENTWOD	

Select applicable Transmission Node PTID to Obtain Aggregation ID

Use the scroll bar for complete information about each Transmission Node, and the complete list of Transmission Nodes

Transmission Nodes


Aggregation System ▼
MPUSER_1
LOGOUT 

Transmission Nodes

PTID	Name	TO	Start Date	End Date	Station Name	Load Pocket
355582		CHG&E	01/01/2023		NCHELSEA	
55870		CONED	01/01/2023		HELLGATE	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23322 ASTORIA WE
80602		CONED	01/01/2023		PLSNTVLE	
355505		CONED	01/01/2023		JAMAICA	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23321 ASTORIA EAS
355998		CONED	01/01/2023		BENSHRST	23320 DUNWOODIE SOUTH,23331 IN-CITY 345/138,23325 VERNON - GR
356117		CONED	01/01/2023		W50THST	23320 DUNWOODIE SOUTH
356125		CONED	01/01/2023		BROWNSV1	23320 DUNWOODIE SOUTH
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55787	N.BELMOR_69_KV_BK1	LIPA	01/01/2023		N.BELMOR	
55790	BROOKVLE_69_KV_TB1	LIPA	01/01/2023		BROOKVLE	
55809	SOUTHOLD_69_KV_BK 2	LIPA	01/01/2023		SOUTHOLD	
55817	TIANA__69_KV_BK 1	LIPA	01/01/2023		TIANA	
55828	HEWLETT__69_KV_BK3	LIPA	01/01/2023		HEWLETT	

Click the arrow icon to open up the Search query, to search report by functionality (TO name)

Click the "spyglass" button to open the Search tab, to search report by specific TO

Search

Select TO ▼

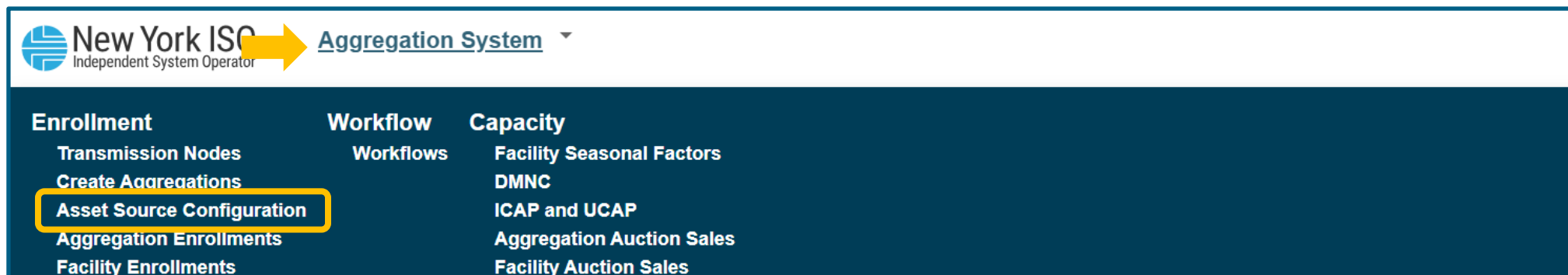
Active Only 👤

Search

Clear Search

Asset Source Configuration

- This report displays information about the various types of assets that each individual DER can contain
- Aggregators can view the different types of assets based on their configuration (source type and source fuel)
- Aggregations must select Asset Source IDs specific to their assets that make up DERs in the Aggregation
- Each asset at each DER must be included in the enrollment data submitted to the NYISO during the enrollment process
 - Aggregations must enter Asset Source IDs in their Facility Enrollments import template



The screenshot shows the New York ISO Aggregation System interface. At the top left is the New York ISO logo and the text 'Independent System Operator'. To the right is a yellow arrow pointing to the 'Aggregation System' dropdown menu. Below this is a dark blue navigation menu with three columns: Enrollment, Workflow, and Capacity. The 'Enrollment' column contains: Transmission Nodes, Create Aggregations, **Asset Source Configuration** (highlighted with a yellow box), Aggregation Enrollments, and Facility Enrollments. The 'Workflow' column contains: Workflows. The 'Capacity' column contains: Facility Seasonal Factors, DMNC, ICAP and UCAP, Aggregation Auction Sales, and Facility Auction Sales.

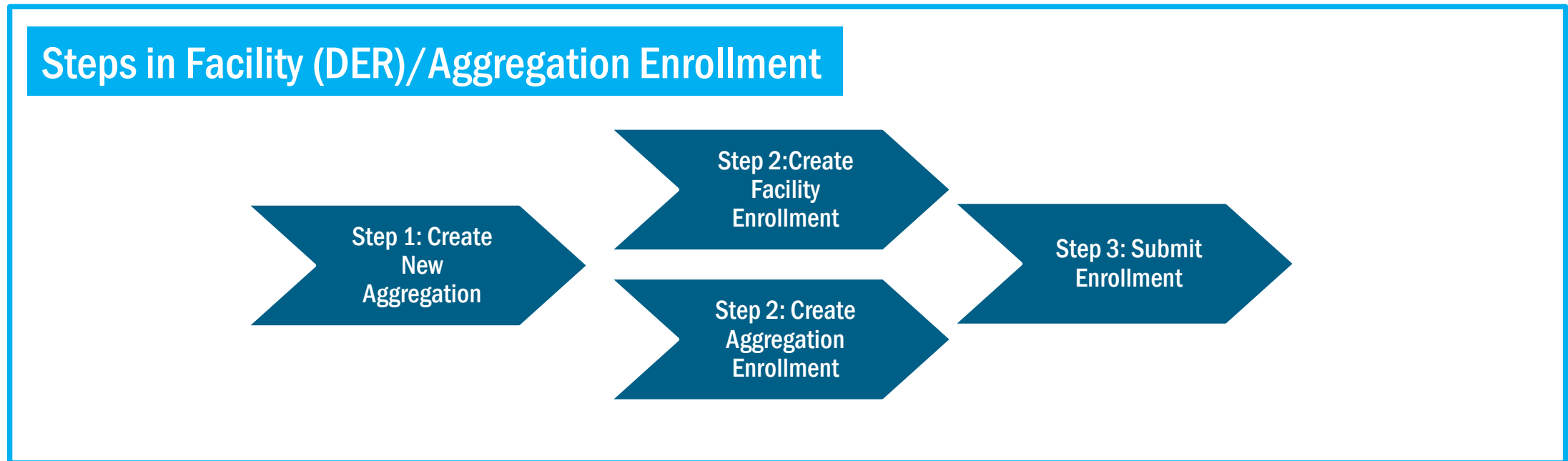
Asset Source Configuration

New York ISO Independent System Operator		Aggregation System		MPUSE LOGOUT			
Asset Source Configuration							
ID	Asset Type	Source Type	Source Fuel	Response Type	Active	Last Update Date	Last Updated By
Search... (94)	Search... (6)	Search... (18)	Search... (23)	Search... (5)	Search... (1)	mm/dd/yyyy	Search... (1)
101	Demand Reduction	Demand Reduction	Curtailment	C	✓	01/30/2023 16:00:29	NYISO
102	Demand Reduction	Demand Reduction	Curtailment	B	✓	01/30/2023 16:00:29	NYISO
103	Demand Reduction	Demand Reduction	Curtailment	I	✓	01/30/2023 16:00:29	NYISO
104	Demand Reduction	Demand Reduction	Curtailment	G	✓	01/30/2023 16:00:29	NYISO
201	Generator	Combined Cycle	Coal		✓	01/30/2023 16:00:29	NYISO
202	Generator	Combined Cycle	Butane		✓	01/30/2023 16:00:29	NYISO
203	Generator	Combined Cycle	Diesel		✓	01/30/2023 16:00:29	NYISO

Select applicable Asset Source ID based on asset configurations to use in facility Enrollment

Asset Source ID Combinations can also be found in Appendix E of the Agg System User's Guide

Steps in Facility (DER)/Aggregation Enrollment



- **Note: Facility and Aggregation Enrollment can be created in any order**
 - Each facility must be linked to an Aggregation using the Aggregation ID to complete Step 3 in the graphic above
- **Every other step is sequential**

Step 1: Create New Aggregation

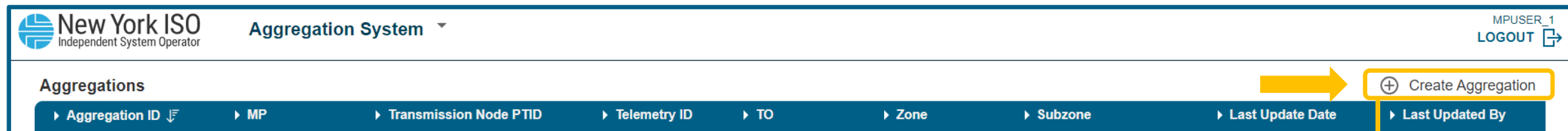
- Aggregator must first obtain an Aggregation ID to enroll an Aggregation
- Aggregator must have applicable Transmission Node ID to which Aggregation will be electrically mapped to, in order to request for an Aggregation ID and create a new Aggregation



The screenshot shows the New York ISO Aggregation System interface. At the top left is the New York ISO logo with the text "Independent System Operator". To its right is a yellow arrow pointing to the text "Aggregation System" with a dropdown arrow. Below this is a dark blue navigation menu with three main categories: "Enrollment", "Workflow", and "Capacity".

Enrollment	Workflow	Capacity
<ul style="list-style-type: none"> Transmission Nodes Create Aggregations Asset Source Configuration Aggregation Enrollments Facility Enrollments 	<ul style="list-style-type: none"> Workflows 	<ul style="list-style-type: none"> Facility Seasonal Factors DMNC ICAP and UCAP Aggregation Auction Sales Facility Auction Sales BSM Aggregation Buckets BSM Facility Summary Aggregation Annual Elections Facility Annual Elections Facility CRIS Monthly

Step 1: Create New Aggregation

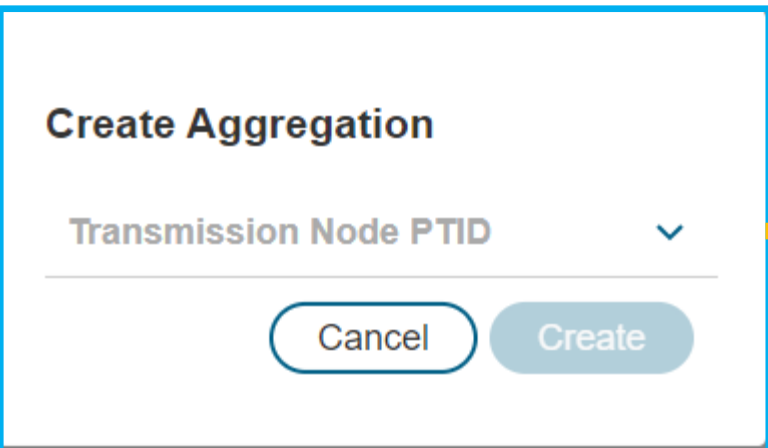


New York ISO Independent System Operator | Aggregation System | MPUSER_1 LOGOUT

Aggregations

Aggregation ID ↓ | MP | Transmission Node PTID | Telemetry ID | TO | Zone | Subzone | Last Update Date | Last Updated By

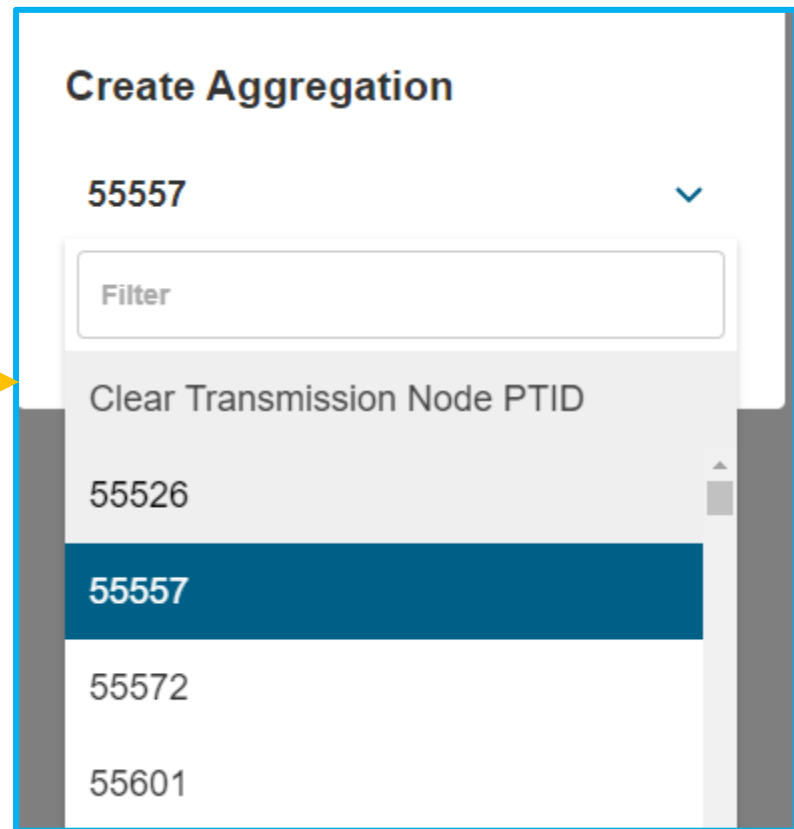
+ Create Aggregation



Create Aggregation

Transmission Node PTID ↓

Cancel Create



Create Aggregation

55557 ↓

Filter

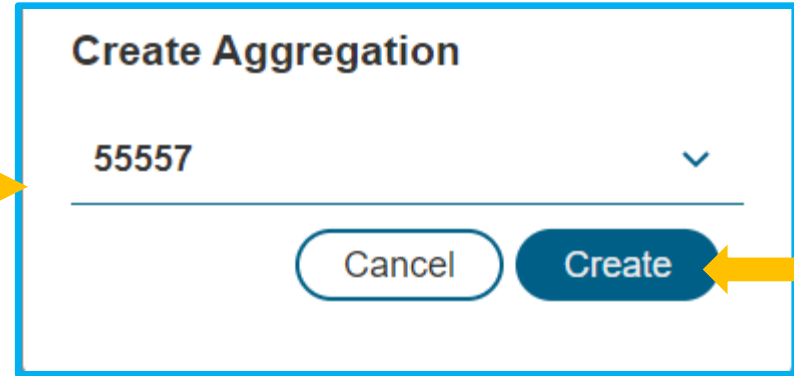
Clear Transmission Node PTID

55526

55557

55572

55601



Create Aggregation

55557 ↓

Cancel **Create**

1. Click the Create Aggregation button
2. Select Applicable Transmission Node
3. Click "Create" to generate new Aggregation

Step 1: Create New Aggregation

Automated message upon successful creation of Aggregation

Info

Aggregation ID: The following Aggregation has been created: Aggregation ID = 800138

New York ISO Independent System Operator								Aggregation System	MPUSER_1 LOGOUT
Aggregations									⊕ Create Aggregation
Aggregation ID	MP	Transmission Node PTID	Telemetry ID	TO	Zone	Subzone	Last Update Date	Last Updated By	
800138	Test_Organization_1	55557		O&R	G - HUD VL	80729 - O&R HUDSON VLY	07/03/2023 22:56:46	MPUSER_1	

- Aggregation ID is automatically created by the Agg System
- Fields Automatically populated by the system:
 - Transmission Node PTID, TO name, Zone and Subzone
- One Telemetry ID and multiple Object IDs will be assigned by NYISO’s Distributed Resources Operations team
 - NYISO’s Power System Applications Engineering (PSAE) group predefines telemetry object IDs for each Member System (TO)
 - Includes range of points to be assigned to new Aggregations that enroll in the applicable Member System’s territory
 - A complete list of Object IDs that will apply to Aggregations can be found in the [NYISO Direct Communications Procedure](#) – this document is CEII and must be requested through the NYISO’s Stakeholder Services department

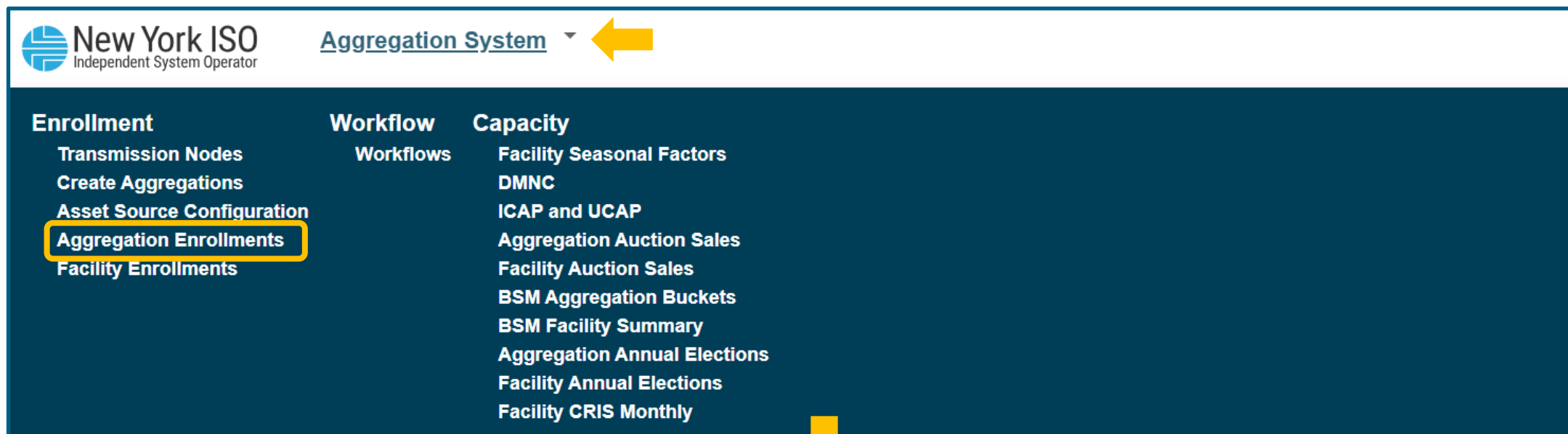
Step 2: Create Aggregation Enrollment

- Once an Aggregation ID has been created in the Agg system, Aggregators can enroll the Aggregation by importing Aggregation specific attributes
- On the Aggregation Enrollments screen, click on Create to download:
 - Blank Enrollment template for importing new data for an Aggregation, or
 - Enrollment template with data to update or make modifications to an existing file
- The required physical and operational Aggregation data that must be uploaded through the Import template includes:

Aggregation ID (From Step 1)	Aggregation Meter Authority	Qualified Ancillary services that Aggregation would like to participate in
Aggregator Contact info	Information about Aggregation Communication with NYISO	ELR classification
Aggregation Type	Registration parameters for Energy Market and Ancillary Services Participation	System populated information from applicable DER facility enrollment (that make up the Aggregation)
Transmission Node PTID	Installed Capacity market participation-based information	System populated information from the uploaded Aggregation data

The complete list of Aggregation data that must be uploaded through the Import template can be found in the Appendix A of the Agg System User's Guide

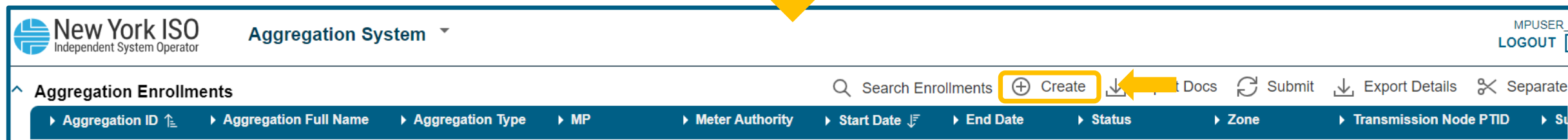
Step 2: Create Aggregation Enrollment



New York ISO Independent System Operator

Aggregation System

Enrollment	Workflow	Capacity
Transmission Nodes	Workflows	Facility Seasonal Factors
Create Aggregations		DMNC
Asset Source Configuration		ICAP and UCAP
Aggregation Enrollments		Aggregation Auction Sales
Facility Enrollments		Facility Auction Sales
		BSM Aggregation Buckets
		BSM Facility Summary
		Aggregation Annual Elections
		Facility Annual Elections
		Facility CRIS Monthly



New York ISO Independent System Operator

Aggregation System

MPUSER_1 LOGOUT

Aggregation Enrollments


Search Enrollments **Create** Attach Docs Submit Export Details Separate

Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node PTID	St
----------------	-----------------------	------------------	----	-----------------	------------	----------	--------	------	------------------------	----

Step 2: Create Aggregation Enrollment


Create/Update Aggregation Enrollment

Download blank template

 Download blank enrollment template


Download template with data

Select Aggregation ▼

 Download enrollment template with data

Import template

Drop file here or [browse](#)

 Import File

Download template with data

Select Aggregation ▼

- 800059
- 800060
- 800032
- 800086
- 800135
- 800136
- 800137
- 800138

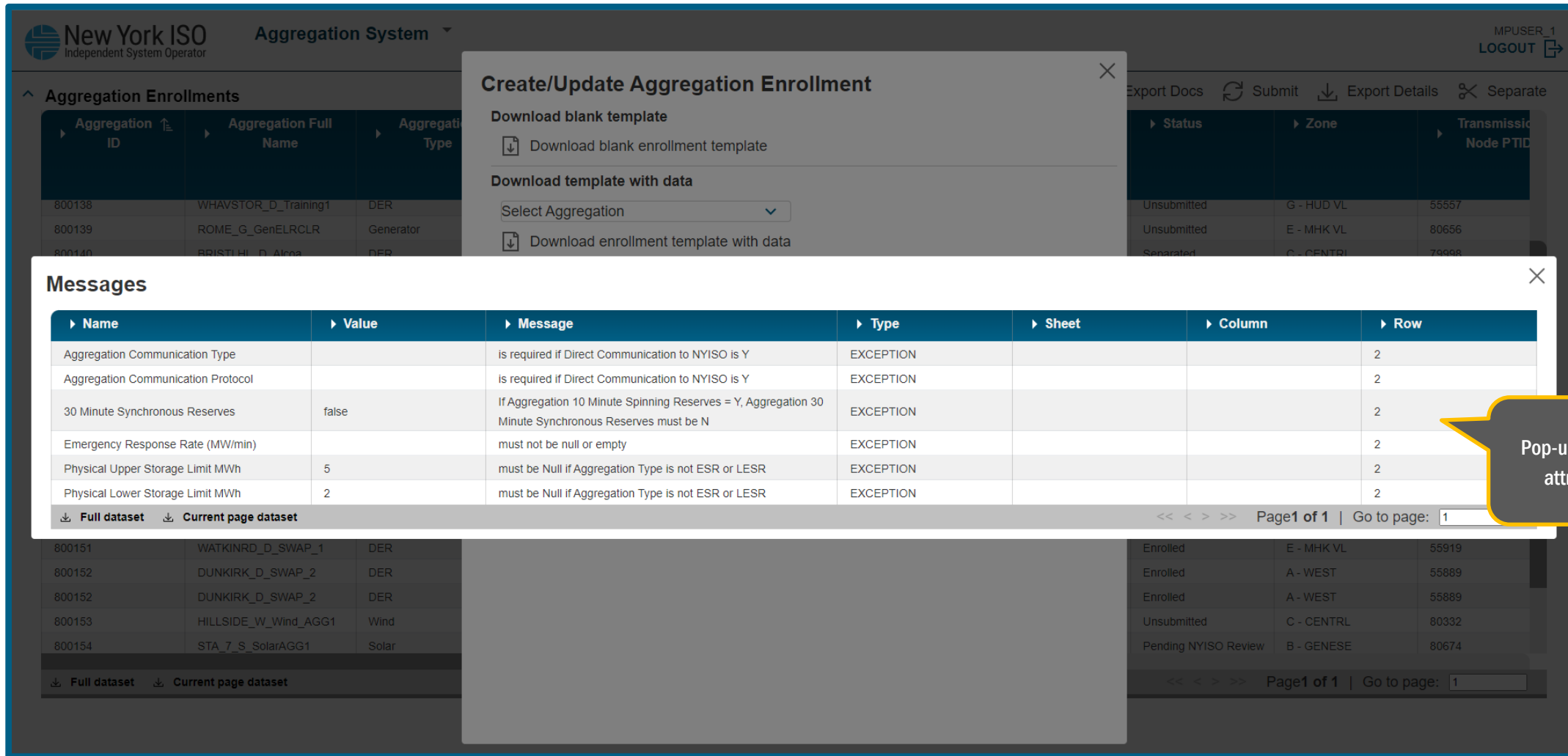
For New Aggregations with a blank import file

For New Aggregations with a existing import file that needs modifications, and For existing Aggregations, to update Enrollment data

Once completed, the downloaded Import template can be submitted here

Click on the pull-down menu to select Aggregation and download enrollment template with data

Step 2: Create Aggregation Enrollment



The screenshot displays the 'Aggregation System' interface. A modal window titled 'Create/Update Aggregation Enrollment' is open, offering options to 'Download blank template' or 'Download template with data'. A 'Messages' pop-up window is also visible, listing several attribute-specific errors. A yellow callout bubble points to this window with the text: 'Pop-up message with a list of attribute specific errors'.

Messages

Name	Value	Message	Type	Sheet	Column	Row
Aggregation Communication Type		is required if Direct Communication to NYISO is Y	EXCEPTION			2
Aggregation Communication Protocol		is required if Direct Communication to NYISO is Y	EXCEPTION			2
30 Minute Synchronous Reserves	false	If Aggregation 10 Minute Spinning Reserves = Y, Aggregation 30 Minute Synchronous Reserves must be N	EXCEPTION			2
Emergency Response Rate (MW/min)		must not be null or empty	EXCEPTION			2
Physical Upper Storage Limit MWh	5	must be Null if Aggregation Type is not ESR or LESR	EXCEPTION			2
Physical Lower Storage Limit MWh	2	must be Null if Aggregation Type is not ESR or LESR	EXCEPTION			2

Pop-up message with a list of attribute specific errors

Step 2: Create Aggregation Enrollment

Messages ✕

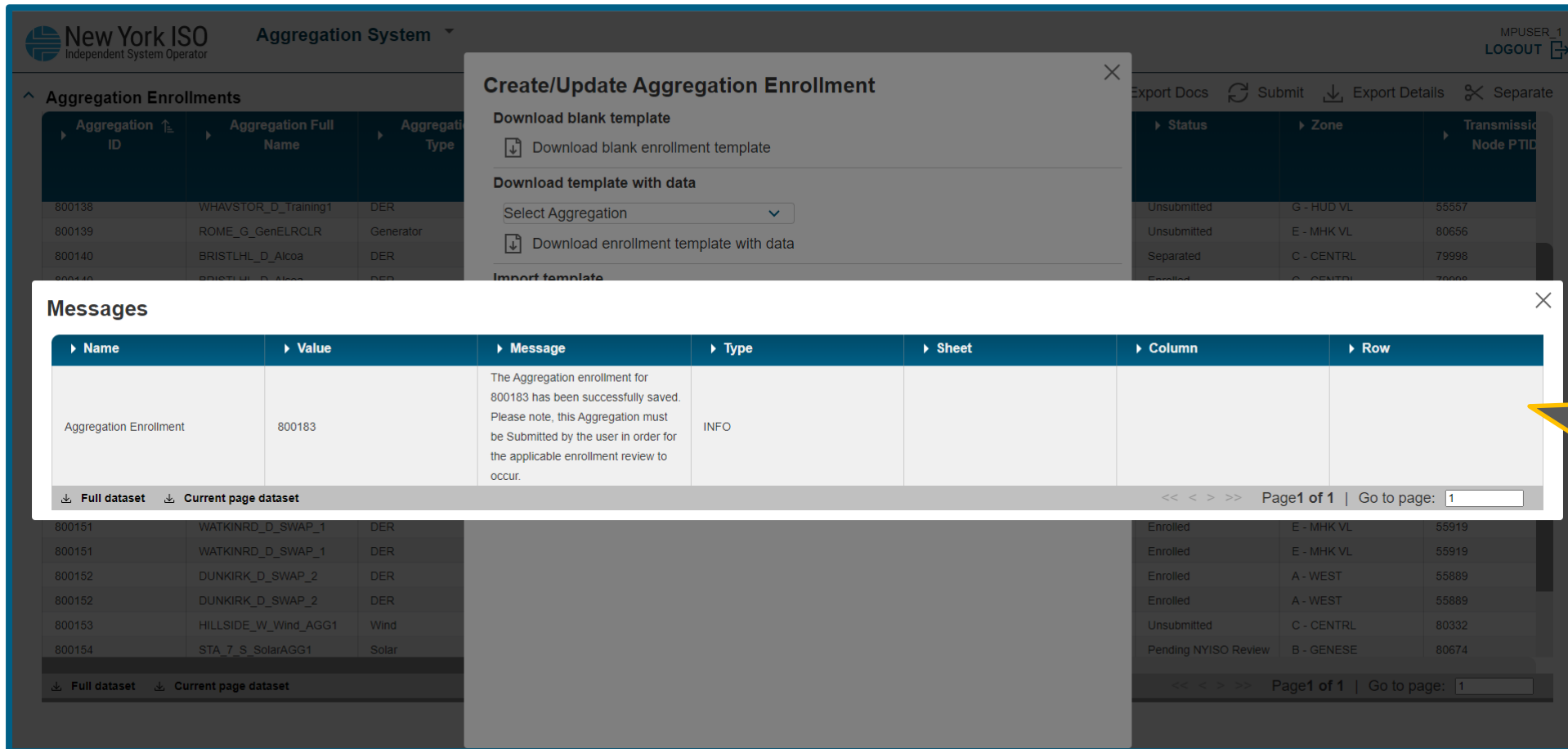
▶ Name	▶ Value	▶ Message	▶ Type	▶ Sheet	▶ Column	▶ Row
		mismatched column: expected "Aggregation Short Name", but was "ELR"	EXCEPTION	Aggregation Enrollments	3	1
		mismatched column: expected "ELR", but was "CLR"	EXCEPTION	Aggregation Enrollments	4	1
		mismatched column: expected "CLR", but was "Charging At Retail"	EXCEPTION	Aggregation Enrollments	5	1
		mismatched column: expected "Charging At Retail", but was "LSE PTID - Aggregation"	EXCEPTION	Aggregation Enrollments	6	1
		mismatched column: expected "LSE PTID - Aggregation", but was "2 Year Outage Schedule Provided"	EXCEPTION	Aggregation Enrollments	7	1
		mismatched column: expected "2 Year Outage Schedule Provided", but was "Aggregation Meter Authority"	EXCEPTION	Aggregation Enrollments	8	1
		mismatched column: expected "Aggregation Meter Authority", but was "Direct Communication to NYISO"	EXCEPTION	Aggregation Enrollments	9	1
		mismatched column: expected "Direct Communication to NYISO", but was "Aggregation Communication Type"	EXCEPTION	Aggregation Enrollments	10	1
		mismatched column: expected "Aggregation Communication Type", but was "Aggregation Communication Protocol"	EXCEPTION	Aggregation Enrollments	11	1
		mismatched column: expected "Aggregation Communication Protocol", but was "Fixed Energy"	EXCEPTION	Aggregation Enrollments	12	1
		mismatched column: expected "Fixed Energy", but was "Dispatched Energy"	EXCEPTION	Aggregation Enrollments	13	1
		mismatched column: expected "Dispatched Energy", but was "Winter Regulation"	EXCEPTION	Aggregation Enrollments	14	1
		mismatched column: expected "Winter Regulation", but was "Summer Regulation"	EXCEPTION	Aggregation Enrollments	15	1
		mismatched column: expected "Summer Regulation", but was "10 Minute Spinning Reserves"	EXCEPTION	Aggregation Enrollments	16	1
		mismatched column: expected "10 Minute Spinning Reserves", but was "10 Minute Non - Spin Reserves"	EXCEPTION	Aggregation Enrollments	17	1
		mismatched column: expected "10 Minute Non - Spin Reserves", but was "30 Minute Synchronous Reserves"	EXCEPTION	Aggregation Enrollments	18	1
		mismatched column: expected "30 Minute Synchronous Reserves", but was	EXCEPTION	Aggregation Enrollments	19	1

[Full dataset](#)
[Current page dataset](#)

 << < > >> Page 1 of 1 | Go to page:

Pop-up message with a list of formatting errors

Step 2: Create Aggregation Enrollment



The screenshot displays the 'New York ISO Aggregation System' interface. A 'Create/Update Aggregation Enrollment' dialog box is open, showing options to 'Download blank template' and 'Download template with data'. Below this, a 'Messages' dialog box displays a success message for aggregation enrollment 800183.


Messages

Name	Value	Message	Type	Sheet	Column	Row
Aggregation Enrollment	800183	The Aggregation enrollment for 800183 has been successfully saved. Please note, this Aggregation must be Submitted by the user in order for the applicable enrollment review to occur.	INFO			

Page 1 of 1 | Go to page: 1

Message indicates that the Aggregation Enrollment file has been successfully saved with no errors

Step 2: Create Aggregation Enrollment


Aggregation System ▾
MPUSER
LOGOUT

Aggregation Enrollments
[+ Create](#) [↻ Submit](#) [↓ Export Details](#) [✂ Separate](#)

Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node PTID
800138	WHAVSTOR_D_Training1	DER	Test_Organization_1	O&R	08/01/2023		Draft		

Details

Agg Enrollment Details
Workflow
Services
Facilities

Aggregation Short Name: Training1
 Aggregation ID: 800138
 Status: Unsubmitted
 Enrollment Action: Create
 Start Date: 08/01/2023
 End Date:
 Aggregation Type: DER
 ELR (Aggregation): N

Clicking on the row of the Aggregation displays the Details section containing Aggregation level and DER facility level information

Status of Aggregation Enrollment:

Step 2: Create Aggregation Enrollment

^ Aggregation Enrollments

+ Create ↻ Submit **↓ Export Details** ✂ Separate 🔍

Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transn
----------------	-----------------------	------------------	----	-----------------	------------	----------	--------	------	--------

Click here to export enrollment details for selected Aggregation

Click Search icon to select enrollment based on the different fields displayed here

Search

Select MP

Select Aggregation ID

Select Aggregation Type

Select TO

Select Zone

Select Transmission Node PTID

Bidding Privileges/Services

Select Status

Select Capability Year

Select Capability Period

Select Capability Month

mm/dd/yyyy mm/dd/yyyy

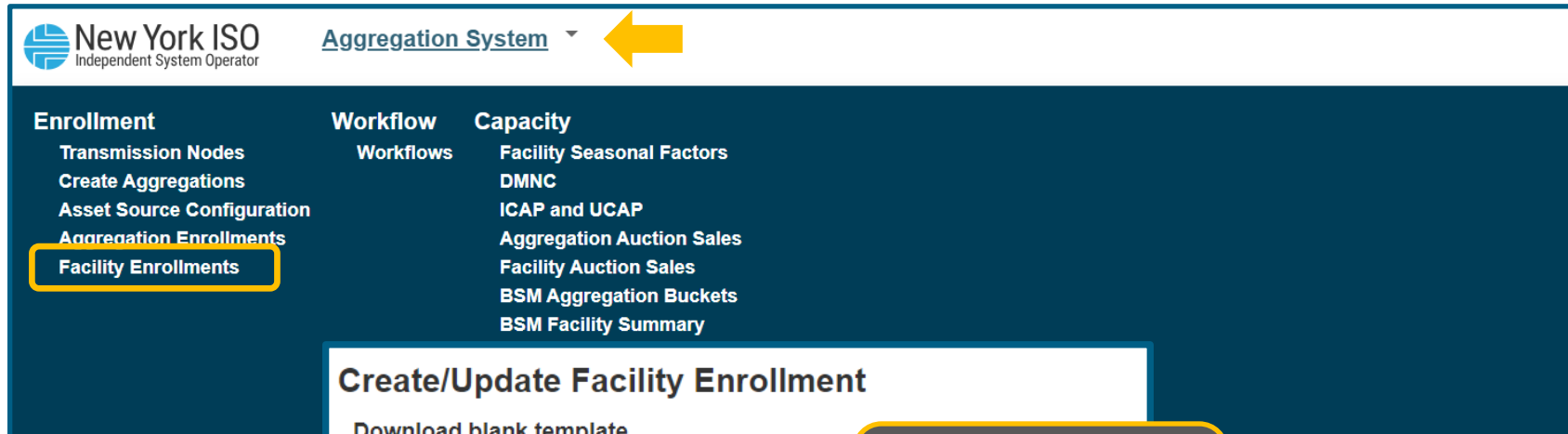
Search

Clear Search

Step 2: Create Facilities Enrollment

- Aggregators must import facility level attributes for DER that make up the Aggregation they want to enroll for market participation
- DERs may contain a single asset or multiple assets: asset level information must also be submitted as part of the facilities enrollment upload
- Facility enrollment can be done before or after uploading the Aggregation enrollment template, but prior to “Submitting” the completed Aggregation enrollment
 - If the facility enrollment data import is completed prior to Aggregation enrollment data import:
 - Any applicable updates/modifications to the Aggregation enrollment data must be reflected in the facility enrollment import file as well
 - Aggregation ID must be updated in the facility data import template to link the Aggregation and facility enrollment
- On the Facility Enrollments screen, click on Create to download:
 - Blank Enrollment template for importing new data for facility/facilities, or
 - Enrollment template with data to update or make modifications to an existing file

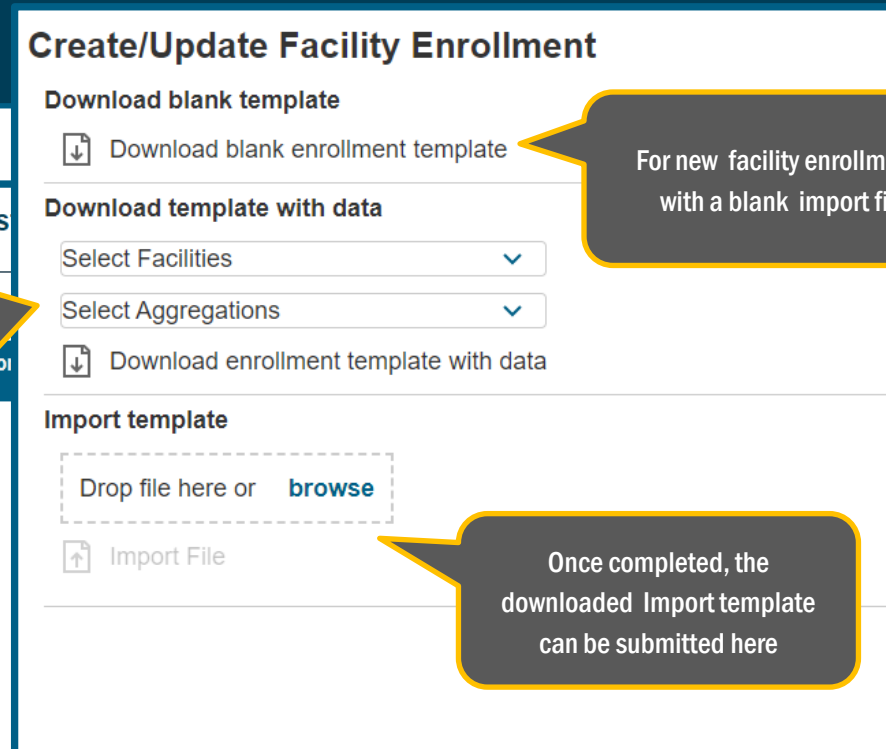
Step 2: Create Facility Enrollment



New York ISO
Independent System Operator

Aggregation System

Enrollment	Workflow	Capacity
Transmission Nodes	Workflows	Facility Seasonal Factors
Create Aggregations		DMNC
Asset Source Configuration		ICAP and UCAP
Aggregation Enrollments		Aggregation Auction Sales
Facility Enrollments		Facility Auction Sales
		BSM Aggregation Buckets
		BSM Facility Summary



Create/Update Facility Enrollment

Download blank template

Download template with data

Select Facilities

Select Aggregations

Import template

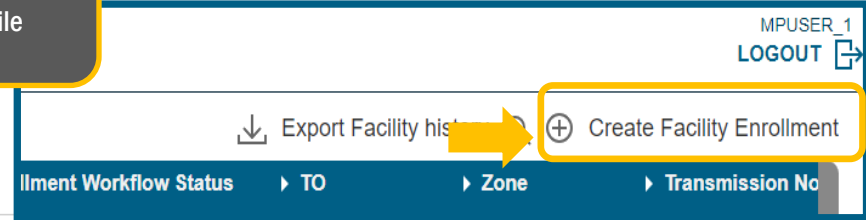
Drop file here or [browse](#)

For new facility enrollments with a blank import file

For new facility enrollments with an existing import file that needs modifications, and
For existing facility enrollments, to update enrollment data

Use the drop-down menu to select specific DER facilities or Aggregation enrollment file(s) to modify

Once completed, the downloaded Import template can be submitted here



MPUSER_1
LOGOUT

Export Facility history

Create Facility Enrollment

Enrollment Workflow Status TO Zone Transmission No

Step 2: Create Facility Enrollment

- The required physical and operational facility data that must be uploaded through the Import template includes:
 - Facility ID – A unique ID assigned by NYISO to the facility
 - For new facilities, Aggregators must use “New 1”, “New 2” etc. when uploading data using a blank template
 - Once enrollment data is imported, the system will create actual Facility IDs
 - Aggregation ID, from Step 1 (Create Aggregation ID)
 - Facility owner contact information
 - Meter ID number
 - Meter Authority
 - Transmission Owner (TO)
 - Transmission Node PTID (identified initially to request Aggregation ID)
 - Interconnection information and Interconnection queue number for Non-Demand Side Facilities
 - NYISO or approved non-NYISO Interconnection

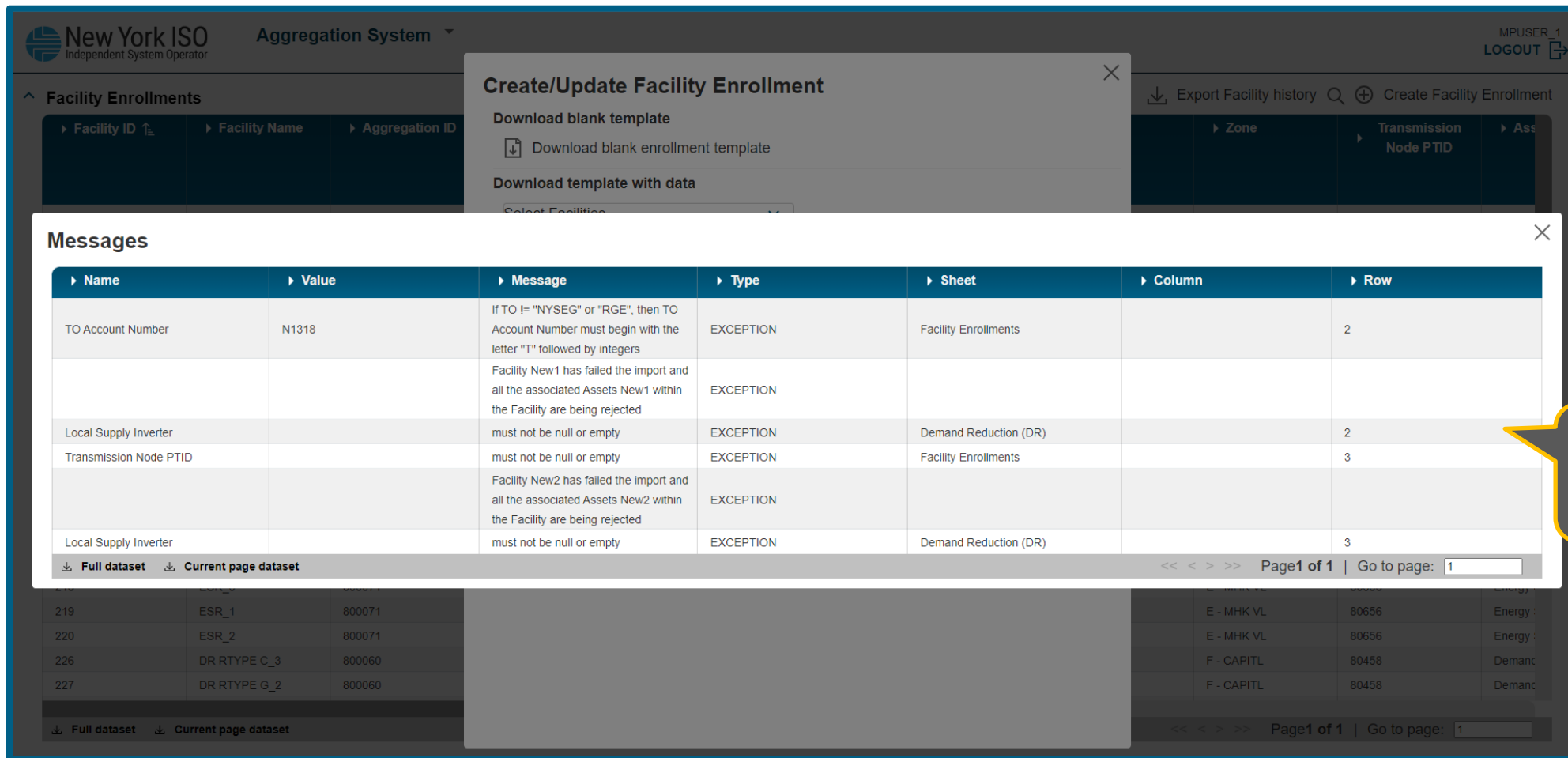
Cont.

Step 2: Create Facility Enrollment

- ERIS or ERIS equivalent MW (Summer and Winter)
- CRIS Unique ID
- Summer and Winter Declared MW values
 - Injection, withdrawal, demand reduction
- Information about qualified Ancillary Services that the DER facility can offer
- Enrollment parameters for Energy and Ancillary Service participation
- Installed Capacity market related information
- Asset based information
 - Use the Asset Source Configuration report for applicable fields
 - For new assets, Aggregators must use “New 1”, “New 2” etc. for Asset ID when uploading data using a blank template
 - Once enrollment data is imported, the system will create actual Asset IDs, according to asset type
 - » Example: for a Demand Reduction asset, Asset ID = D followed by system assigned number

The complete list of facility and asset data that must be uploaded through the Import template can be found in the [Appendix B of the Agg System User’s Guide](#)

Step 2: Create Facility Enrollment



The screenshot shows the 'New York ISO Aggregation System' interface. A 'Create/Update Facility Enrollment' modal is open, and a 'Messages' pop-up window is displayed in the foreground. The 'Messages' window contains a table with the following data:

Name	Value	Message	Type	Sheet	Column	Row
TO Account Number	N1318	If TO != "NYSEG" or "RGE", then TO Account Number must begin with the letter "T" followed by integers	EXCEPTION	Facility Enrollments		2
		Facility New1 has failed the import and all the associated Assets New1 within the Facility are being rejected	EXCEPTION			
Local Supply Inverter		must not be null or empty	EXCEPTION	Demand Reduction (DR)		2
Transmission Node PTID		must not be null or empty	EXCEPTION	Facility Enrollments		3
		Facility New2 has failed the import and all the associated Assets New2 within the Facility are being rejected	EXCEPTION			
Local Supply Inverter		must not be null or empty	EXCEPTION	Demand Reduction (DR)		3

At the bottom of the 'Messages' window, there are links for 'Full dataset' and 'Current page dataset', and a pagination control showing 'Page 1 of 1' and 'Go to page: 1'.

Pop-up message with a list of attribute specific errors

Step 2: Create Facility Enrollment

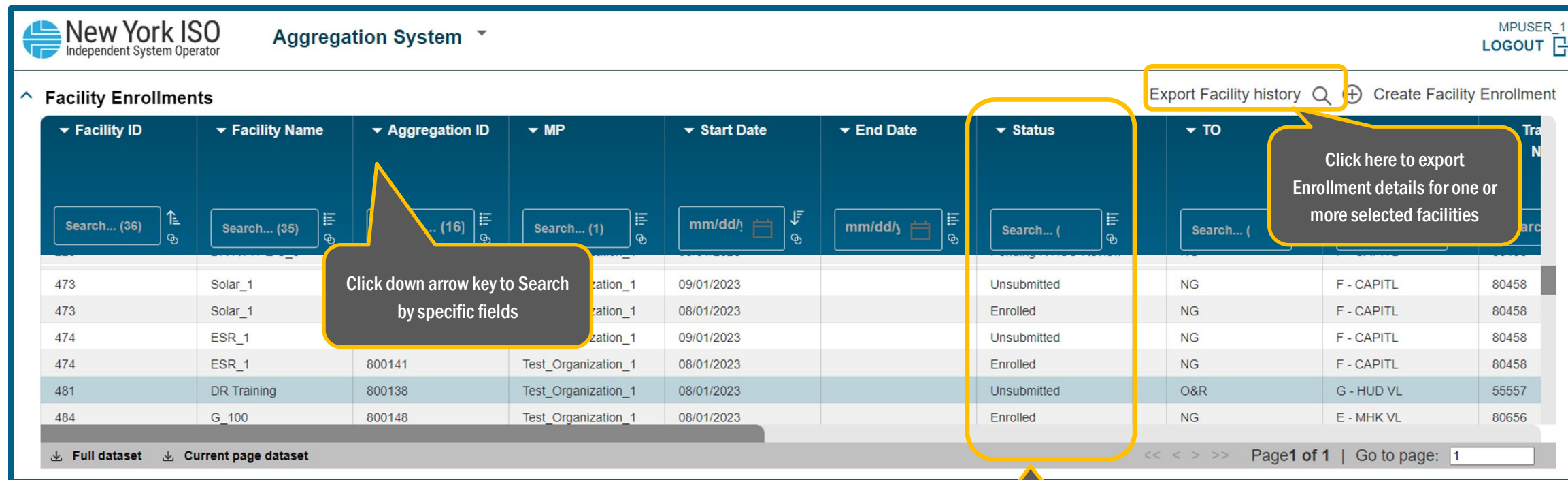
Messages ✕

Name	Value	Message	Type	Sheet	Column	Row
		mismatched column: expected "Responsible Party Attestation", but was "Facility Owner Name"	EXCEPTION	Facility Enrollments	6	1
		mismatched column: expected "Facility Owner Name", but was "Facility Owner Phone"	EXCEPTION	Facility Enrollments	7	1
		mismatched column: expected "Facility Owner Phone", but was "Facility Owner Phone Extension"	EXCEPTION	Facility Enrollments	8	1
		mismatched column: expected "Facility Owner Phone Extension", but was "Facility Owner Email"	EXCEPTION	Facility Enrollments	9	1
		mismatched column: expected "Facility Owner Email", but was "Transmission Node PTID"	EXCEPTION	Facility Enrollments	10	1
		mismatched column: expected "Transmission Node PTID", but was "DER within Municipality"	EXCEPTION	Facility Enrollments	11	1
		mismatched column: expected "DER within Municipality", but was "Municipality Name"	EXCEPTION	Facility Enrollments	12	1
		mismatched column: expected "Municipality Name", but was "Charging At Retail - Facility"	EXCEPTION	Facility Enrollments	13	1
		mismatched column: expected "Charging At Retail - Facility", but was "LSE PTID - Facility"	EXCEPTION	Facility Enrollments	14	1
		mismatched column: expected "LSE PTID - Facility", but was "Former PTID Exists"	EXCEPTION	Facility Enrollments	15	1
		mismatched column: expected "Former PTID Exists", but was "Former PTID #"	EXCEPTION	Facility Enrollments	16	1
		mismatched column: expected "Former PTID #", but was "Former Dris Resource Exists"	EXCEPTION	Facility Enrollments	17	1
		mismatched column: expected "Former Dris Resource Exists", but was "Former Dris Resource ID #"	EXCEPTION	Facility Enrollments	18	1
		mismatched column: expected "Former Dris Resource ID #", but was "Street Address"	EXCEPTION	Facility Enrollments	19	1
		mismatched column: expected "Street Address", but was "City"	EXCEPTION	Facility Enrollments	20	1
		mismatched column: expected "City", but was "State"	EXCEPTION	Facility Enrollments	21	1
		mismatched column: expected "State", but was "Zip Code"	EXCEPTION	Facility Enrollments	22	1

[Full dataset](#)
[Current page dataset](#)
Page 1 of 1 | Go to page:

Pop-up message with a list of formatting errors

Step 2: Create Facility Enrollment



New York ISO Aggregation System MPUSER_1
LOGOUT

Facility Enrollments

Export Facility history Create Facility Enrollment

Facility ID	Facility Name	Aggregation ID	MP	Start Date	End Date	Status	TO	Tr
473	Solar_1		zation_1	09/01/2023		Unsubmitted	NG	F - CAPITL 80458
473	Solar_1		zation_1	08/01/2023		Enrolled	NG	F - CAPITL 80458
474	ESR_1		zation_1	09/01/2023		Unsubmitted	NG	F - CAPITL 80458
474	ESR_1	800141	Test_Organization_1	08/01/2023		Enrolled	NG	F - CAPITL 80458
481	DR Training	800138	Test_Organization_1	08/01/2023		Unsubmitted	O&R	G - HUD VL 55557
484	G_100	800148	Test_Organization_1	08/01/2023		Enrolled	NG	E - MHK VL 80656

Full dataset | Current page dataset

Page 1 of 1 | Go to page:

Click down arrow key to Search by specific fields

Click here to export Enrollment details for one or more selected facilities

Status of Aggregation Enrollment for selected DER facility

Step 2: Assigning Facilities to an Aggregation

- Prior to “submitting” an Enrollment, the Aggregator must ensure that each facility is assigned to its respective Aggregation
 - For each facility that makes up an Aggregation, the system assigned Aggregation ID must be entered in the facility’s enrollment record when importing the data template
 - By linking the applicable Aggregation ID to the facility enrollment record, the Aggregation enrollment record and facility enrollment record are mapped together for initial validation by the Agg system
 - Important to note that only DER type Aggregations can have one facility assigned to it, as long as the facility is a Demand Side Resource
 - All other types of Aggregations must have at least two facilities assigned to it, to be able submit the enrollment

Step 3: Submit Enrollment

New York ISO Independent System Operator | Aggregation System | MPUSER_1 LOGOUT

Aggregation Enrollments

⊕ Create
🔄 Submit
📄 Export Details
✂ Separate
🔍

Aggregation ID	Aggregation Name	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node PTID
800071	ROME_E_ESR_AGG1	ESR	Test_Organization_1	04/01/2023		Pending NYISO Review	E - MHK VL	80656
800086	BENSHRST_G_Gen_AGG1	Generator	Test_Organization_1	07/01/2023		Enrolled	J - N.Y.C.	355998

Aggregation Enrollments are submitted on the Aggregation Enrollments screen

Click on the Submit button, then select Aggregation using radio button, and click Submit


New York ISO Independent System Operator | Aggregation System | MPUSER_1 LOGOUT

Aggregation Enrollments

🔍 Search Enrollments
Cancel
Submit


Select	Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone
<input type="checkbox"/>	800071	ROME_E_ESR_AGG1	ESR	Test_Organization_1	NG	04/01/2023		Pending NYISO Review	E - MHK VL
<input type="checkbox"/>	800086	BENSHRST_G_Gen_AGG1	Generator	Test_Organization_1	CONED	07/01/2023		Enrolled	J - N.Y.C.

Step 3: Submit Enrollment



New York ISO
Independent System Operator

Aggregation System

MPUSER_1
LOGOUT 

^ Aggregation Enrollments

Cancel Submit

Select	Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone
<input type="checkbox"/>	800071	ROME_E_ESR_AGG1						Pending NYISO Review	E - MHK VL
<input type="checkbox"/>	800086	BENSHRST_G_Gen_AGG1						Enrolled	J - N.Y.C.
<input checked="" type="checkbox"/>	800138	WHAVSTOR_D_Training1						Unsubmitted	G - HUD VL

Submit Enrollments

Please submit required supporting documentation to each of the Aggregation and Facility level DVM Workflows. If any issues arise, please email the NYISO's Distributed Resources Operations Department

Cancel
Confirm

Prompt to submit required documentation through DVM workflows to complete the enrollment

Step 3: Submit Enrollment

New York ISO Independent System Operator		Aggregation System		MPUSER_1 LOGOUT						
Aggregation Enrollments						+	↻	↓	✂	🔍
Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node PTID	
800071	ROME_E_ESR_AGG1	ESR	Test_Organization_1	NG	04/01/2023		Pending NYISO Review	E - MHK VL	80656	
800086	BENSHRST_G_Gen_AGG1	Generator	Test_Organization_1	CONED	07/01/2023		Enrolled	J - N.Y.C.	355998	
800138	WHAVSTOR_D_Training1	DER	Test_Organization_1	O&R	08/01/2023		Submitted	G - HUD VL	55557	

Status of Aggregation Enrollment: Submitted

Initial NYISO Validation

Initial NYISO Validation

- Once the Aggregation enrollment has been submitted, the NYISO's Distributed Resources Operations (DRO) team will perform an initial validation
- Includes a high-level DER composition check
- If the Aggregation enrollment passes validation:
 - NYISO will send the Aggregation/ facility Enrollment data package to applicable Distribution Utility for their review
 - **Status in the Aggregations Enrollment screen: Submitted**
- If the Aggregation enrollment fails validation:
 - NYISO will notify the Aggregator via email, so the Aggregator can re-submit their enrollment with the required modifications
 - **Status in the Aggregations enrollment screen: Draft**

Upfront Documentation Requests

- Supporting upfront documentation required to validate the enrollment of facilities/Aggregations can be submitted using the Documentation Vault through:
 - Aggregation workflow (DVM by Aggregation) and/or
 - Facility workflow (DVM by Facility)
- Failure to submit required documentation(s) within the specified timeframe may result in separation or delayed participation of the Aggregation and/or facility
- All submitted documentation is subject to NYISO review
- A complete list of upfront documentation required to be submitted can be found in the [Appendix C of the Agg System User's Guide](#)

Upfront Documentation Requests

- The fields in the workflow screens include:
 - Reason for documentation request
 - Due Date
 - Upload document option
 - Comments by Aggregator and/or NYISO
 - Status of Documentation request
 - **Open:** Indicates that action is required by the Aggregator or that the action is under review by the NYISO
 - **Passed:** Confirms that the documents have been reviewed by the NYISO, and no further action is needed by the Aggregator
 - **Failed:** Indicates that the documentation or justification provided by the Aggregator has been rejected by the NYISO

Upfront Documentation Submission

Click on the Workflows header to view Documentation requests



Aggregation System ▾



Enrollment

- Transmission Nodes
- Create Aggregations
- Asset Source Configuration
- Aggregation Enrollments
- Facility Enrollments

Workflow

Workflows

Capacity

- Facility Seasonal Factors
- DMNC
- ICAP and UCAP
- Aggregation Auction Sales
- Facility Auction Sales
- BSM Aggregation Buckets
- BSM Facility Summary
- Aggregation Annual Elections
- Facility Annual Elections
- Facility CRIS Monthly

Documentation Vault - By Aggregation

Click down arrow key to Search by specific fields

Workflows

Workflow	Aggregation ID	Facility ID	MP	Month	Status	Last Update Date	Last Updated By
DVM by Aggregation	800116		Test_Organization_1	March 2025	Open	02/20/2025 10:52:07	MPUSER_1
DVM by Facility	800116	312	Test_Organization_1	March 2025	Open	02/20/2025 10:52:07	MPUSER_1
DVM by Facility	800116	311	Test_Organization_1	March 2025	Open	02/20/2025 10:52:06	MPUSER_1
DVM by Aggregation	800115		Test_Organization_1	March 2025	Open	02/18/2025 13:53:29	MPUSER_1

Clicking on any row to view Documentation requests details by Aggregation level

Details

Workflow Tasks

Task ID	Task Name	History	Comments	Attachments	Status	Reason	Aggregation ID	Facility ID
22153	ICAP Supplier Two Year Outage Schedule				Open	Upfront Field - Capacity	800116	
22154	Meter Authority Confirmation				Open	Upfront Field - Meter Authority	800116	

Full dataset
 Current page dataset

Document upload option

Status indicator of the documentation request

MP	Month	Due Date	Last Update Date	Last Updated By
Test_Organization_1	March 2025	02/28/2025 17:00:00	02/20/2025 10:52:07	NYISO
Test_Organization_1	March 2025	02/28/2025 17:00:00	02/20/2025 10:52:08	NYISO

Documentation Vault – By Facility

Workflows

Workflow	Aggregation ID	Facility ID	MP	Month	Status	Last Update Date	Last Updated By
DVM by Aggregation	800116		Test_Organization_1	March 2025	Open	02/20/2025 10:52:07	MPUSER_1
DVM by Facility	800116	312	Test_Organization_1	March 2025	Open	02/20/2025 10:52:07	MPUSER_1
DVM by Facility	800116	311	Test_Organization_1	March 2025	Open	02/20/2025 10:52:06	MPUSER_1



Details

Workflow Tasks

Task ID	Task Name	History	Comments	Attachments	Status	Reason
22150	Outage State Confirmation				Open	Upfront Field - Outage State Confirmation
22146	Generator Specifications				Open	Upfront Field - Summer Declared Injection MW, Winter Declared Injection MW
22147	Interconnection Agreement				Open	Upfront Field - Summer Declared Injection MW, Winter Declared Injection MW
22148	Meter Authority Confirmation				Open	Upfront Field - Facility ID

Clicking on any row to view Documentation requests details by Aggregation level

Facility	MP	Month	Due Date	Last Update Date	Last Updated By
312	Test_Organization_1	March 2025	02/28/2025 17:00:00	02/20/2025 10:52:07	NYISO
312	Test_Organization_1	March 2025	02/28/2025 17:00:00	02/20/2025 10:52:07	NYISO
312	Test_Organization_1	March 2025	02/28/2025 17:00:00	02/20/2025 10:52:07	NYISO
312	Test_Organization_1	March 2025	02/28/2025 17:00:00	02/20/2025 10:52:07	NYISO



Monitored Field Change Documentation Requests

- NYISO may require submission of additional documentation from Aggregator for any monitored field changes after initial enrollment
- Documentation requests will be displayed under DVM by facility in the Workflows screen
 - Reason for documentation request will be displayed as “Monitored Field”
- Please refer to [Appendix D of the Agg System User’s Guide](#) for details on Monitored Fields

Clicking on the History field provides information about the old and new value for the specified monitored field

Task	History	Comments	Attachments	Status	Reason	Aggregation ID	Facility ID
11092	Meter Authority Confirmation			Open	Monitored Field - Meter Authority	800026	226
11093	TO Transmission Node Confirmation			Open	Monitored Field - Transmission Node PTID	800026	226
11094	Utility Bill			Open	Monitored Field - Zip Code	800026	226

Full dataset Current page dataset

Distribution Utility Review

Distribution Utility DER Review

- The NYISO will facilitate a review process to allow the applicable Distribution Utility (DU) to review DER enrollments that are interconnected to its electric facilities for safety and reliability
 - Takes place once Initial NYISO validation has been completed
 - NYISO transfers facility and Aggregation enrollment data
- **DU Review:**
 - Verifies that operating characteristics of the facilities and Aggregations are not in violation of existing Interconnection agreements, metering configurations or other pertinent safety and reliability considerations

Distribution Utility DER Review

- **Successful DU review:**
 - DU will notify the NYISO that the Aggregation does not pose safety or reliability risk
 - **The Aggregator will receive an email from the NYISO confirming the DER and Aggregation will move on to the next step in the enrollment process**
 - **NYISO Review typically starts on the 1st of the month following completion of successful DU review**

Distribution Utility DER Review

- DU identifies safety and/or reliability concerns:
 - The DU will provide the NYISO with an explanation of the identified safety and reliability issues
 - NYISO will provide this information to the Aggregator via email
 - NYISO will “unsubmit” the Aggregation enrollment from the Agg System
 - Status in the Agg System Enrollment screen for the applicable Aggregation: Draft
 - Once the Aggregator addresses the applicable safety and/or reliability concerns identified by the DU, they can re-submit the enrollment data record for each facility and Aggregation
 - NYISO will re-send the enrollment data package back to the DU
 - Upon successful completion of DU review, the Aggregation enrollment can proceed to the next step

NYISO Review

NYISO Review

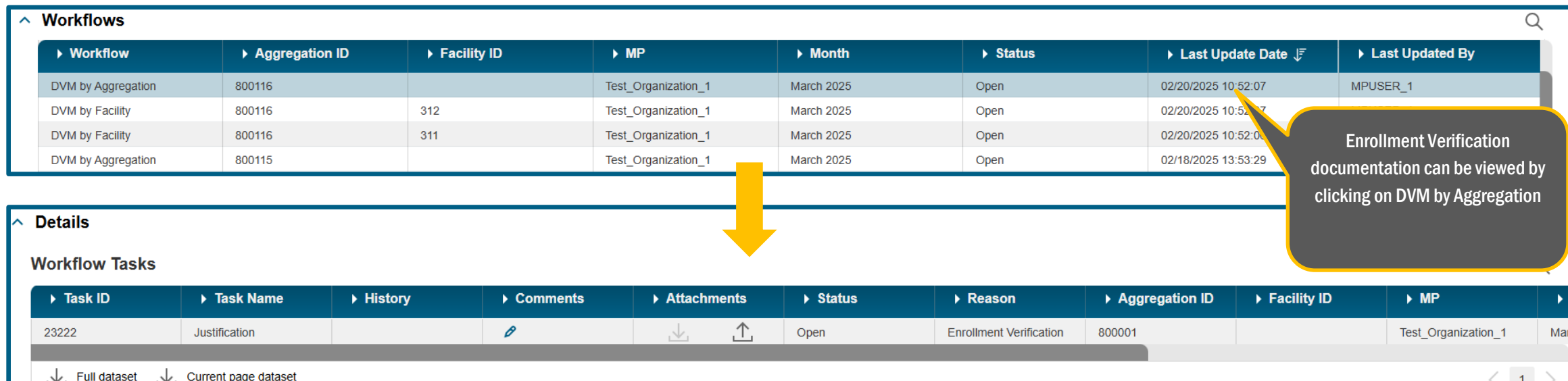
- NYISO Review typically begins on the 1st of the month following a successful DU review
 - NYISO Review will take approximately 15-25 days
 - An Aggregation may begin participation in the NYISO markets on the 1st of the month, following completion of NYISO review
- At the start of the NYISO review month:
 - **Status of the Aggregation on the Aggregation Enrollments screen changes to: Pending NYISO Review**
- During this period, NYISO performs a series of validations and reviews to check that the facilities and Aggregation enrollment data appreciably conform to market rules
- NYISO tasks include:
 - Enrollment data review
 - Aggregation, facility and asset level
 - Verification of ERIS and ERIS equivalent MW values (Summer and Winter)
 - Verification of CRIS MW value (Summer and Winter)
 - Confirmation of ELR resource status

NYISO Review

- Coordination with the Aggregator on end-to-end communications testing
 - NYISO emails Aggregator, (as well as the applicable Member System) the Telemetry ID and Object ID(s) assigned by NYISO
 - Aggregator coordinates with the NYISO and respective Member System to complete end-to-end communications testing
 - Completing the end-to-end communications test within the first 5 days of the NYISO review month supports timely market entry and mitigates some risk of delay
 - Refer to the [End-to-end communications testing fact sheet of the DER Onboarding Educational Suite](#) for detailed information on this process
- Review for duplicate enrollment of facilities
 - If NYISO finds duplicate enrollment of facilities in more than one Aggregation, or if the facility is enrolled in any other NYISO programs such as SCR
 - NYISO will email the applicable Aggregator(s)
 - NYISO will review contract and other information submitted for the applicable facility by the Aggregator(s)
 - Duplicate enrollments will be resolved according to NYISO procedures

Requests

- NYISO may create a documentation request for the verification of any Aggregation, facility or asset enrollment data under the workflows page
 - Reason for documentation request under workflow task details: Enrollment verification
- Along with the workflow page update, NYISO will email the applicable Aggregator with instructions on information required and due date for submission of documents
 - Aggregator should submit documents via the upload feature on the workflow page



Workflows

Workflow	Aggregation ID	Facility ID	MP	Month	Status	Last Update Date	Last Updated By
DVM by Aggregation	800116		Test_Organization_1	March 2025	Open	02/20/2025 10:52:07	MPUSER_1
DVM by Facility	800116	312	Test_Organization_1	March 2025	Open	02/20/2025 10:52:07	
DVM by Facility	800116	311	Test_Organization_1	March 2025	Open	02/20/2025 10:52:07	
DVM by Aggregation	800115		Test_Organization_1	March 2025	Open	02/18/2025 13:53:29	

Details

Workflow Tasks

Task ID	Task Name	History	Comments	Attachments	Status	Reason	Aggregation ID	Facility ID	MP
23222	Justification				Open	Enrollment Verification	800001		Test_Organization_1


Full dataset | Current page dataset

Enrollment Verification documentation can be viewed by clicking on DVM by Aggregation

NYISO Review

- If all steps in the NYISO review are successfully completed
 - **Status in the Aggregations Enrollment screen: Enrolled**
 - NYISO notifies the Aggregator via email of successful enrollment of aggregation
- If the Aggregation fails any of the steps during the NYISO's Review
 - NYISO will reject the enrollment of the Aggregation and the associated DER facilities
 - NYISO emails Aggregator details on why the Aggregation enrollment was rejected
 - **Status in the Aggregations Enrollment screen: Rejected**
 - The Aggregator can resubmit its enrollment materials after modifying the DER facility/Aggregation enrollment data to address NYISO's concerns

NYISO Review



New York ISO
Independent System Operator

Aggregation System

MPUSER_1
LOGOUT

^ Aggregation Enrollments

+ Create
↻ Submit
↓ Export Details
✂ Separate
🔍

Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node PTID
800183	WATKINRD_D_Train_1	DER	Test_Organization_1	NG	10/01/2023		Pending NYISO Review	E - MHK VL	55919

Full dataset
Current page dataset

<< < > >>
Page 1 of 1
Go to page:

^ Details

Agg Enrollment Details
Workflow
Services
Facilities

Facility ID	Facility Name	Status	Asset Type(s)	Summer Total Supply Declared MW	Winter Total Supply Declared MW	Last Update Date	Last Updated By
663	Train_01	Pending NYISO Review	Demand Reduction	150	150	08/14/2023 07:13:43	NYISO
664	Train_02	Pending NYISO Review	Demand Reduction	120	120	08/14/2023 07:13:43	NYISO

Full dataset
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Status of the enrollment, at the start of the NYISO review month


Pending NYISO Review

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NYISO Review








New York ISO
Independent System Operator

Aggregation System ▾

MPUSER_1
LOGOUT 

^ Aggregation Enrollments

 Create
 Submit
 Export Details
 Separate


Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node PTID
800183	WATKINRD_D_Train_1	DER	Test_Organization_1	NG	10/01/2023		Enrolled	E - MHK VL	55919

Full dataset
Current page dataset

<< >> Page 1 of 1 | Go to page:

^ Details

Agg Enrollment Details
Workflow
Services
Facilities

Facility ID ↑	Facility Name	Status	Asset Types(s)	Summer Total Supply Declared MW	Winter Total Supply Declared MW	Last Update Date	Last Updated By
663	Train_01	Enrolled	Demand Reduction	150	150	08/14/2023 07:21:37	NYISO
664	Train_02	Enrolled	Demand Reduction	120	120	08/14/2023 07:21:37	NYISO

Full dataset
Current page dataset

<< >> Page 1 of 1 | Go to page:

Status of enrollment that has passed successful NYISO review


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NYISO Review



New York ISO
Independent System Operator

Aggregation System

MPUSER_1
LOGOUT

Aggregation Enrollments

⊕ Create ↻ Submit ↓ Export Details ✂ Separate 🔍

Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node PTID
800168	CHATEAUG_G_MSM_TG	Generator	Test_Organization_1	NYPA	09/01/2023	09/30/2023	Rejected	D - NORTH	355732

Full dataset Current page dataset

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Details

Agg Enrollment Details Workflow Services Facilities

Facility ID	Facility Name	Status	Asset Types(s)	Summer Total Supply Declared MW	Winter Total Supply Declared MW	Last Update Date	Last Updated By
586	G_TY	Rejected	Generator	10	10	08/09/2023 10:53:02	NYISO
587	G_TN	Rejected	Generator	8	8	08/09/2023 10:53:02	NYISO
588	G_TY2	Rejected	Generator	4	4	08/09/2023 10:53:02	NYISO

Full dataset Current page dataset

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Status of the enrollment, if it fails NYISO review

Rejected

Workflow - Post Enrollment

Workflows

Workflow	Aggregation ID	Facility ID	MP	Month	Status	Last Update Date	Last Updated By
Post-Enrollment	800025		Test_Organization_1	April 2025	Passed	03/21/2025 12:17:35	NYISO
Post-Enrollment	800016		Test_Organization_1	April 2025	Passed	03/21/2025 12:15:49	NYISO
DVM by Facility	800025		Test_Organization_1	April 2025	Open	03/21/2025 11:52:23	MPUSER_1

Clicking on the Post Enrollment row displays the tasks and status completed by NYISO, post enrollment

Details

Workflow Tasks

Task ID	Task Name	History	Comments	Attachments	Status	Reason	Aggregation ID	Facility ID	MP
24778	Update Enrollment Status to Enrolled				Passed		800025		Test_Organization_1
24783	Calculation Steps from ICAP to UCAP				Passed		800025		Test_Organization_1

Full dataset
 Current page dataset

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Post enrollment Setup for 1st month of Participation

- Once the Aggregation has been enrolled in the Agg system, there will be an automatic transfer of Aggregation and facility specific information to the MIS and other NYISO Internal systems
- Based on the market services that the Aggregation is qualified to participate in:
 - Flags for Energy, Operating Reserves and Regulation will be set in MIS
- Verification testing for Operating reserves and Regulation must be coordinated between the NYISO's Grid Operations group and the Aggregator for each applicable Aggregation
 - Must be completed within the first 14 days of the 1st month of Energy and ancillary services participation

Enrollment Actions for Installed Capacity Market Participation

Participation in the Installed Capacity Market

- New DER and Aggregations
 - Installed Capacity Market Participation: From the 2nd month of participation onwards
 - Aggregations must be in the **Status: Enrolled** in the Aggregations Enrollment screen prior to submitting DMNC test data
 - To begin participating in the Installed Capacity market in a month, DMNC test data for DER and Aggregations must be conducted and submitted within the first 7 days of the prior month
 - In alignment with the applicable Agg monthly DMNC calendar event
 - Aggregator must submit DMNC data for all DER that constitute the Aggregation, even if one or more DER do not provide capacity in the Installed Capacity market

Market

- Existing resources transitioning into the DER and Aggregation participation model
 - Installed Capacity Market Participation: Can start 1st month after NYISO Review and successful enrollment
 - Resources must be existing capacity suppliers
 - Aggregations that these DER will be a part of can be in the **Status: Pending NYISO Review or Enrolled** in the Aggregations Enrollment screen when submitting the applicable DMNC test data
 - In alignment with the applicable Agg monthly DMNC calendar event
 - All DER within the Aggregation must provide capacity and must participate in the Installed Capacity market
 - Two types:
 - **Special Case Resources (SCRs):** Provided provisional DMNC is submitted and validated during the month of NYISO Review
 - **Single Resource Type (SRT) stand-alone Generators:** Provided SRT transfer DMNC is submitted and validated during the month of NYISO Review

* Refer to Section 4 of the Aggregation Manual for more details

DMNC for Resources Transitioning to the DER and Aggregation Participation Model

- **Provisional DMNC for SCRs**: Equivalent to the declared value, maximum allowed is the ACL value for the SCR
 - Enables uninterrupted capacity market participation for resources switching from SCR capacity market participation into the DER and Aggregation participation model
- **SRT Transfer for stand-alone Generators**: Previously approved DMNC value being currently used for Installed Capacity market participation
 - Enables uninterrupted capacity market participation for resources switching from stand-alone generator capacity market participation into the DER and Aggregation participation model

DMNC for Resources Transitioning to the DER and Aggregation Participation Model

- A provisional DMNC/SRT Transfer record must be validated with a regular in-period DMNC test for the applicable Capability Period
 - Dates and deadlines for submission of in-period DMNC testing for Summer and Winter Capability Periods can be found in the ICAP Event Calendar
- Before submitting facility and Aggregation information for enrollment into the Aggregation System:
 - An Aggregator that would like to utilize a provisional DMNC or SRT Transfer DMNC based on the Aggregation's composition should contact DER@nyiso.com to discuss the process requirements

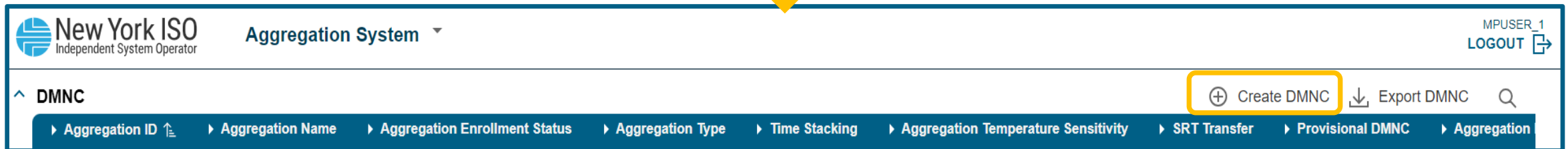
Creating and Submitting DMNC in the Agg System



New York ISO Independent System Operator

Aggregation System

- Enrollment
 - Transmission Nodes
 - Create Aggregations
 - Asset Source Configuration
 - Aggregation Enrollments
 - Facility Enrollments
- Workflow
 - Workflows
- Capacity
 - Facility Seasonal Factors
 - DMNC**
 - ICAP and UCAP
 - Aggregation Auction Sales
 - Facility Auction Sales
 - BSM Aggregation Buckets
 - BSM Facility Summary
 - Aggregation Annual Elections
 - Facility Annual Elections
 - Facility CRIS Monthly



New York ISO Independent System Operator

Aggregation System

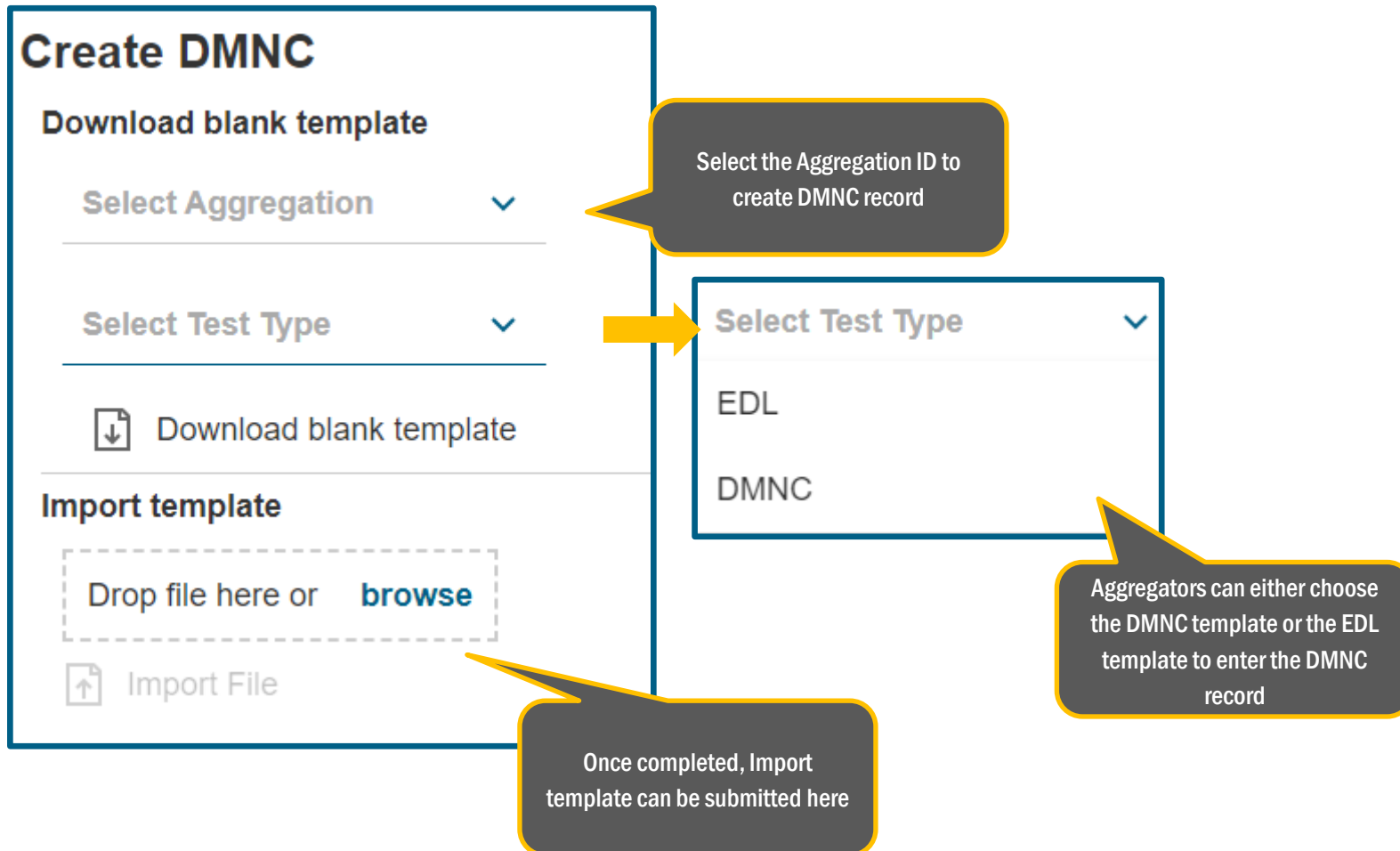
MPUSER_1 LOGOUT

DMNC

+ Create DMNC Export DMNC

Aggregation ID	Aggregation Name	Aggregation Enrollment Status	Aggregation Type	Time Stacking	Aggregation Temperature Sensitivity	SRT Transfer	Provisional DMNC	Aggregation
----------------	------------------	-------------------------------	------------------	---------------	-------------------------------------	--------------	------------------	-------------

Creating and Submitting DMNC in the Agg System




The screenshot shows the 'Create DMNC' interface. It includes a 'Download blank template' section with a 'Select Aggregation' dropdown and a 'Select Test Type' dropdown. Below this is another 'Download blank template' button with a download icon. The 'Import template' section features a dashed box for file upload with 'Drop file here or browse' text and an 'Import File' button with an upload icon. Three callouts provide instructions: one points to the 'Select Aggregation' dropdown, another points to the 'Select Test Type' dropdown which is open to show 'EDL' and 'DMNC' options, and a third points to the 'Import File' button.

Create DMNC

Download blank template


Select Aggregation

Select Test Type

 Download blank template

Import template

Drop file here or [browse](#)

 Import File

Select the Aggregation ID to create DMNC record

Select Test Type

EDL

DMNC

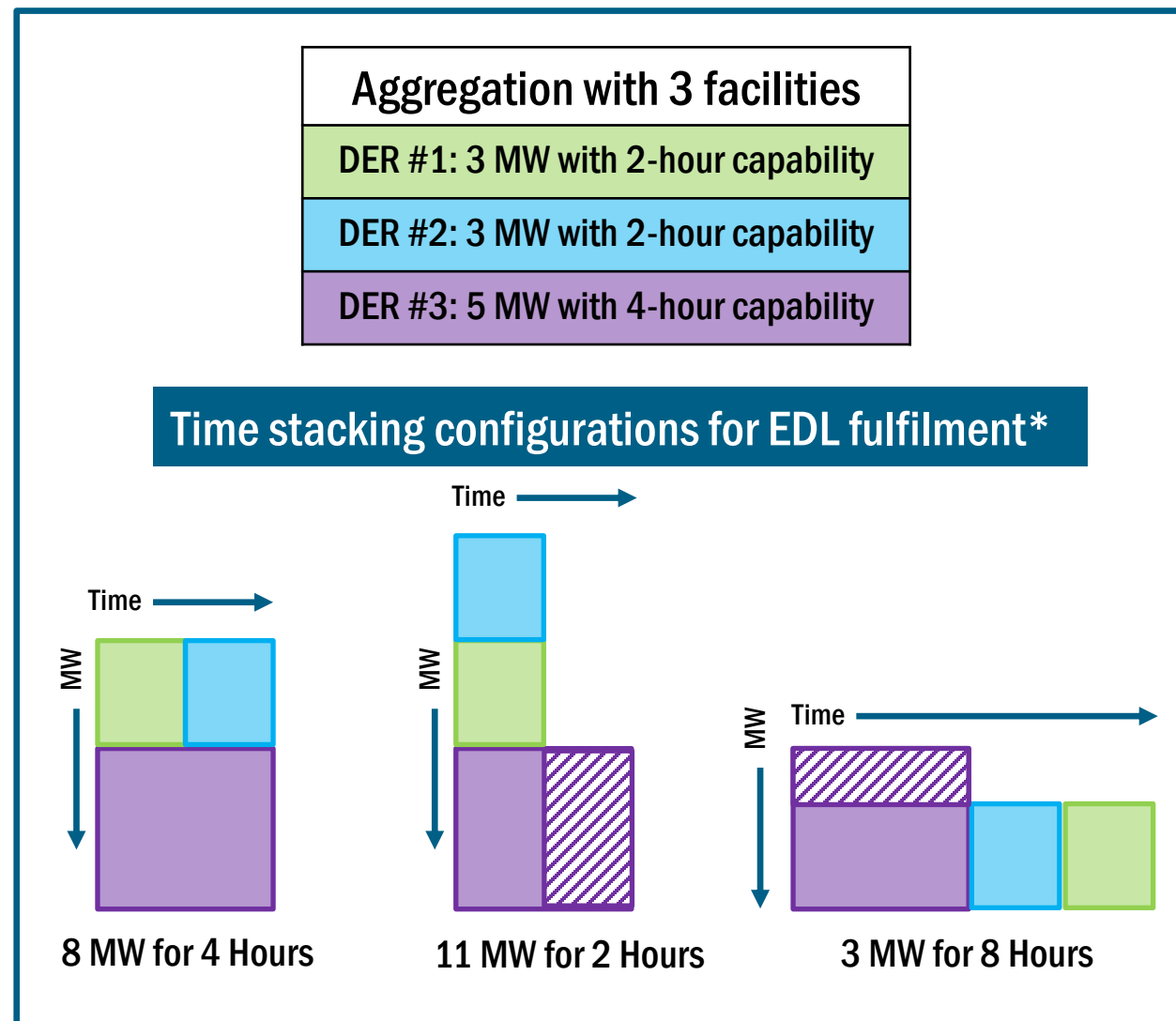
Once completed, Import template can be submitted here

Aggregators can either choose the DMNC template or the EDL template to enter the DMNC record

- If the Aggregation has an Energy Duration Limitation (EDL) and has indicated that in their Aggregation Enrollment file, the EDL Test template should be chosen for initial DMNC submission
 - For subsequent Capability Periods, either the DMNC template or EDL template can be chosen according to rules set forth in the [ICAP Manual, Section 4.2.2.2](#)
- This template also allows for time-stacking information to be submitted

Creating and Submitting DMNC

- Time stacking: Available to an Aggregation with Energy Duration Limitation (EDL), where DER that can provide a minimum of 1 hour of Energy, can be grouped up with other DER in the Aggregation through sequential Time-Stacking, to sum up to the Aggregation's EDL election
 - Available EDL elections are 2,4,6, and 8 hours
 - The Aggregator can configure the individual facilities' duration and capacity to meet the elected EDL
 - Once selected, EDL elections remain the same for a capability year
 - EDL elections for an Aggregation can be modified during the Annual election every August for the upcoming Capability Year



*For details refer to Section 4.1.3 of the ICAP Manual

Creating and Submitting DMNC in the Agg system

- **DMNC and DMNC Time Stacking attributes to be submitted:**
 - **Aggregation level attributes:** Aggregator indicates here if provisional DMNC or SRT transfer DMNC is being submitted
 - If the Aggregation is enrolled with an EDL, the EDL will be auto-populated in the Aggregation's template export
 - **Aggregation Hourly Attributes:** Includes DMNC test information that is repeated every hour
 - **Facility hourly level attributes:** Includes facility level DMNC test information that is repeated every hour
 - DER time stacking elections
- For a full list of the attributes to be submitted, refer to the [Appendix D of the Agg System User's Guide](#)

Creating and Submitting DMNC in the Agg New York ISO System

New York ISO Independent System Operator Aggregation System

DMNC + Create DMNC ↓ Export DMNC

Aggregation ID	Aggregation Name	Aggregation Enrollment Status	Aggregation Type	Time Stacking	Aggregation Temperature Sensitivity	SRT Transfer	Provisional DMNC	Aggregation EDL	Test Date
800140	TR_EDL	Pending NYISO Review	DER	Update			✓	6	05/15/2023
800141	SB_EDL	Enrolled	DER	Update				8	06/01/2023
800141	SB_EDL	Enrolled	DER	Update				8	06/01/2023

Go to page: 1

Use the scroll bar to view all the populated fields on this screen

This field indicates the current status the Aggregation enrollment, when submitting the DMNC

By clicking here, Aggregators can update their hourly time-stacking values for applicable Aggregations and facilities, after the DMNC record has been reviewed and approved by NYISO at the Aggregation level

Time stacking updates can be performed up to Certification close for the following month

These fields indicates if the DMNC record is a provisional DMNC or an SRT transfer

These fields indicates the EDL election for the Aggregation



Continued on next slide

Creating and Submitting DMNC in the Agg System

▶ Start Date ↑	▶ Test Start HB	▶ Test Duration	▶ Electing To Time Stack	▶ End Date	▶ Capability Period Type	▶ In/Out of Period	▶ MP Aggregation Demonstrated Capability MW	▶ Aggregation Pre-Test Rating MW
08/01/2023	11	6		10/31/2023	Summer	OUT	90.5	
08/01/2023	10	8	✓	10/31/2024	Summer	IN	0.874	
09/01/2023	10	8	✓	10/31/2024	Summer	IN	0.874	

[Full dataset](#)
[Current page dataset](#)
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This field indicates when the DMNC test was submitted

Out of period DMNC test submissions must be validated by an in-period test

DMNC test period information can be found on the ICAP Event calendar



Continued on next slide

Creating and Submitting DMNC in the Agg System

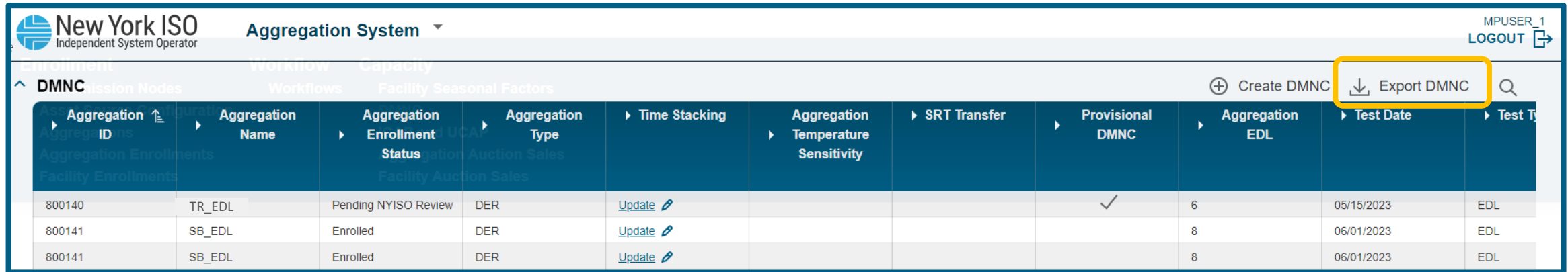
Aggregation Post-Test Rating MW	DMNC Status	Reason	Created Date	Created By	Last Update Date	Last Updated By
90.5	Approved		07/10/2023 12:19:50	MPUSER_1	07/11/2023 16:16:36	NYISO
0.874	Pending Review	Waiting MMA Review	07/10/2023 15:46:03	MPUSER_1	07/11/2023 08:46:39	NYISO
0.874	Withdrawn	Waiting MMA Review	07/10/2023 15:39:32	MPUSER_1	07/10/2023 15:46:03	MPUSER_1

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The Aggregator can view the status of their submitted DMNC record here

Once submitted, DMNC test data will need to be reviewed and validated by NYISO's Market Mitigation and Analysis (MMA) team to be approved

Creating and Submitting DMNC in the Agg System



New York ISO Aggregation System

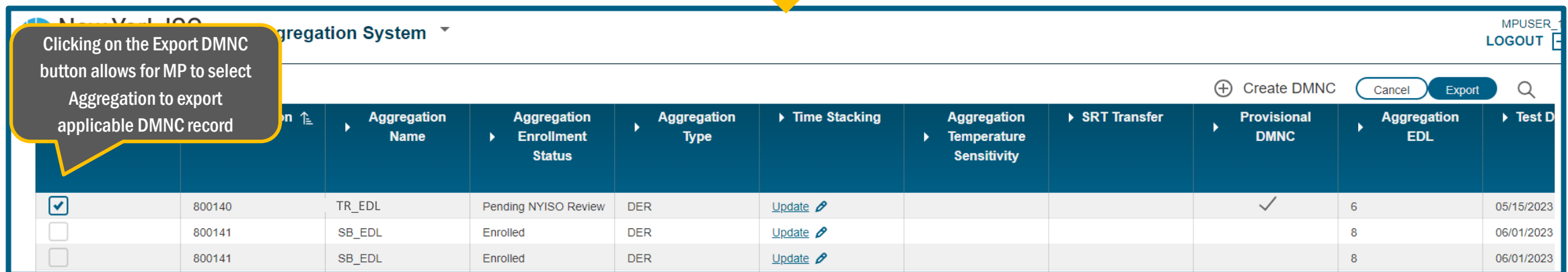
MPUSER_1 LOGOUT

Enrollment Workflow Capacity

DMNC Mission Nodes Workflows Facility Seasonal Factors

+ Create DMNC Export DMNC

Aggregation ID	Aggregation Name	Aggregation Enrollment Status	Aggregation Type	Time Stacking	Aggregation Temperature Sensitivity	SRT Transfer	Provisional DMNC	Aggregation EDL	Test Date	Test T
800140	TR_EDL	Pending NYISO Review	DER	Update			✓	6	05/15/2023	EDL
800141	SB_EDL	Enrolled	DER	Update				8	06/01/2023	EDL
800141	SB_EDL	Enrolled	DER	Update				8	06/01/2023	EDL

New York ISO Aggregation System

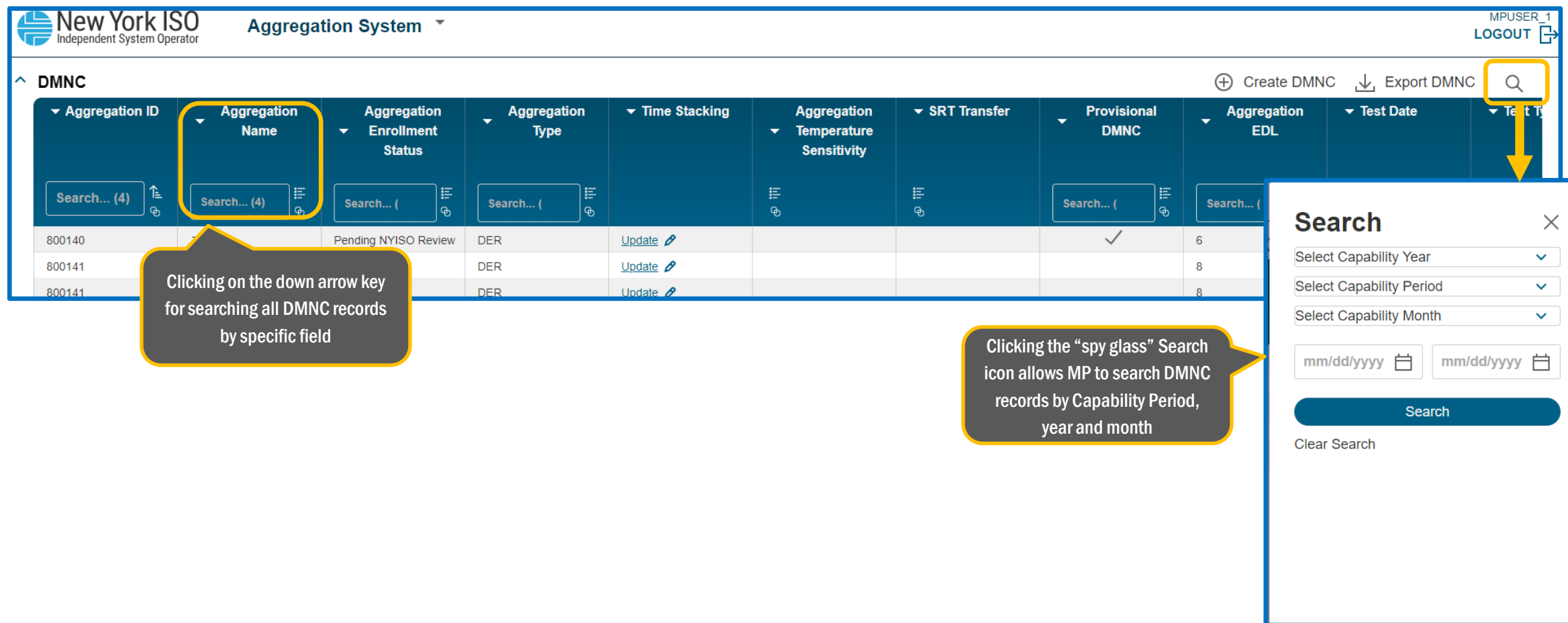
MPUSER_1 LOGOUT

+ Create DMNC Cancel Export

Clicking on the Export DMNC button allows for MP to select Aggregation to export applicable DMNC record

Aggregation ID	Aggregation Name	Aggregation Enrollment Status	Aggregation Type	Time Stacking	Aggregation Temperature Sensitivity	SRT Transfer	Provisional DMNC	Aggregation EDL	Test Date	Test D
<input checked="" type="checkbox"/>	800140	TR_EDL	Pending NYISO Review	DER	Update		✓	6	05/15/2023	
<input type="checkbox"/>	800141	SB_EDL	Enrolled	DER	Update			8	06/01/2023	
<input type="checkbox"/>	800141	SB_EDL	Enrolled	DER	Update			8	06/01/2023	

Creating and Submitting DMNC in the Agg System



The screenshot displays the 'Aggregation System' interface. At the top, the New York ISO logo and 'Independent System Operator' are visible. The page title is 'Aggregation System'. In the top right corner, the user 'MPUSER_1' is logged in, with a 'LOGOUT' button.

The main content area is titled 'DMNC' and contains a table with the following columns: Aggregation ID, Aggregation Name, Aggregation Enrollment Status, Aggregation Type, Time Stacking, Aggregation Temperature Sensitivity, SRT Transfer, Provisional DMNC, Aggregation EDL, Test Date, and Test Time. The table lists three records with Aggregation IDs 800140, 800141, and 800141. The first record has an enrollment status of 'Pending NYISO Review' and a 'Provisional DMNC' status of 'Yes'.

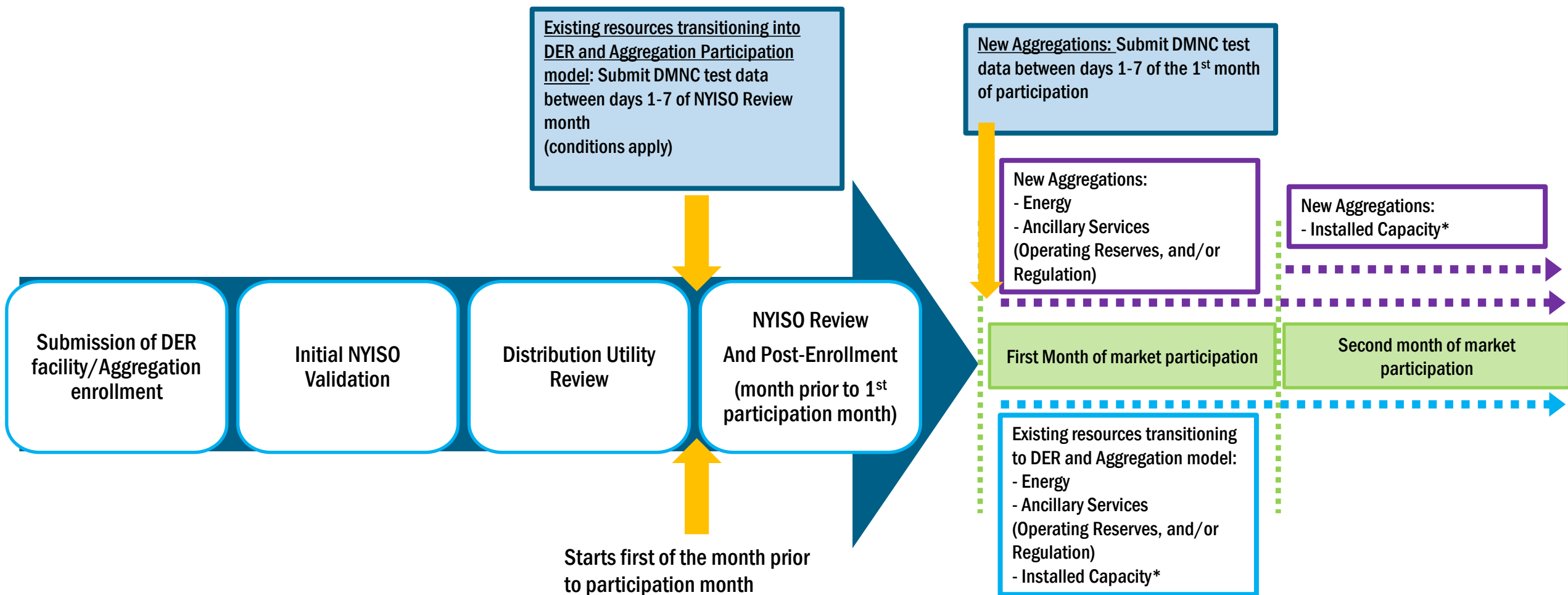
Two callout boxes provide instructions:

- Left Callout:** 'Clicking on the down arrow key for searching all DMNC records by specific field'. This points to the dropdown arrow in the 'Aggregation Name' column header.
- Right Callout:** 'Clicking the "spy glass" Search icon allows MP to search DMNC records by Capability Period, year and month'. This points to the search icon in the top right of the table area.

A search modal is open on the right side of the screen. It is titled 'Search' and includes the following fields:

- Select Capability Year (dropdown)
- Select Capability Period (dropdown)
- Select Capability Month (dropdown)
- mm/dd/yyyy (calendar icon)
- mm/dd/yyyy (calendar icon)
- Search button
- Clear Search link

Summary: Energy and Installed Capacity Market Participation for DER Aggregations



* Provided DMNC test data is validated and approved by NYISO

Management of Enrollments

Aggregation and DER Facility Management

- An Aggregator who has one or more Aggregations enrolled in the Agg System and is participating in NYISO markets must re-submit all Enrollment data if:
 - There are any physical or operational changes in the Aggregation or any of the DER that make up the Aggregation, and/or
 - If the Aggregation wishes to add/remove one or more DER to their Aggregation
- If the Aggregator needs to make a change to the Aggregation, then the Aggregator must request the current submission be unsubmitted by reaching out via email to DER@nyiso.com
- The Aggregator will update the Aggregation and DER enrollment template by choosing the applicable Aggregation ID and facility ID

Aggregation and Facility Management

- The updated enrollment will then go through the DU review and NYISO review, as described previously
 - DU review: The applicable DU will review enrollment information for any changes in safety and reliability due to the change in the composition of the Aggregation or due to changes to existing facilities
 - NYISO Review: DRO and other internal teams in the NYISO will review and validate the updated characteristics of the Aggregation and/or facilities
- The Aggregator must submit all relevant documentation that reflect the modified composition of the Aggregation
- The Aggregation's old record will be end-dated to the last day of the NYISO review month, so the Aggregation can continue to participate in the NYISO's markets and services without a break, pending approval by the NYISO

Participation Model Transitions

- Resources that participate in other NYISO markets that wish to transition to the DER and Aggregation participation model, or DER that wish to transition out of the DER and Aggregation participation model must follow the requirements and deadlines that may vary depending on the participation model it currently belongs to
 - Examples:
 - SCR transitioning to the DER and Aggregation Participation model, or Demand Reduction facilities that wish to participate as an SCR
 - Stand-alone generator transitioning to the DER and Aggregation Participation model, or DER in an Aggregation that wish to participate as stand-alone generator under participation models based on their technology type

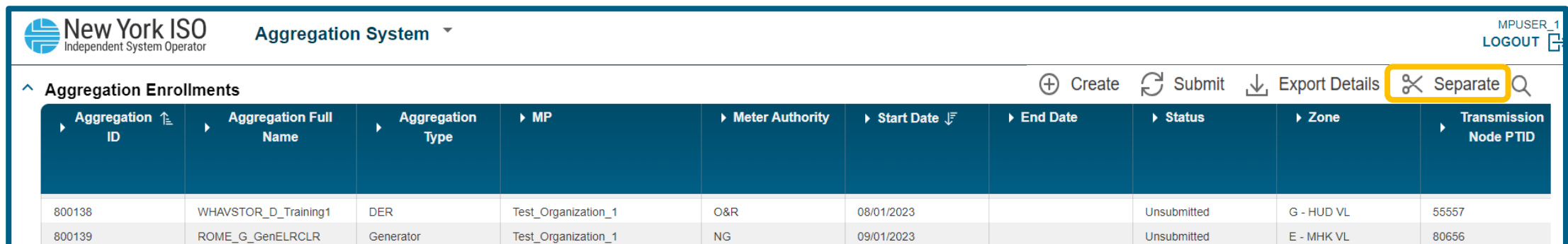
Participation Model Transitions

- Resources that transition to the DER and Aggregation participation model must utilize the enrollment process as described in this presentation, in order to enroll in the Agg System and be able to participate in NYISO markets and services
 - The Aggregation and facilities enrollment import template have specific fields that will identify these as existing resources
 - Resources will also need to complete ICAP market tasks like submission and validation of DMNC in order to participate in the ICAP market; see relevant section in this presentation
- DER that wish to transition out of the DER and Aggregation participation model will need to separate from the Aggregation
 - See following slides for details
- **For a detailed description of all the rules, please also refer to the Aggregation Manual – Section 4, Participation Model Transitions to and from DER**

Separating an Aggregation/ Facility

Separating an Aggregation

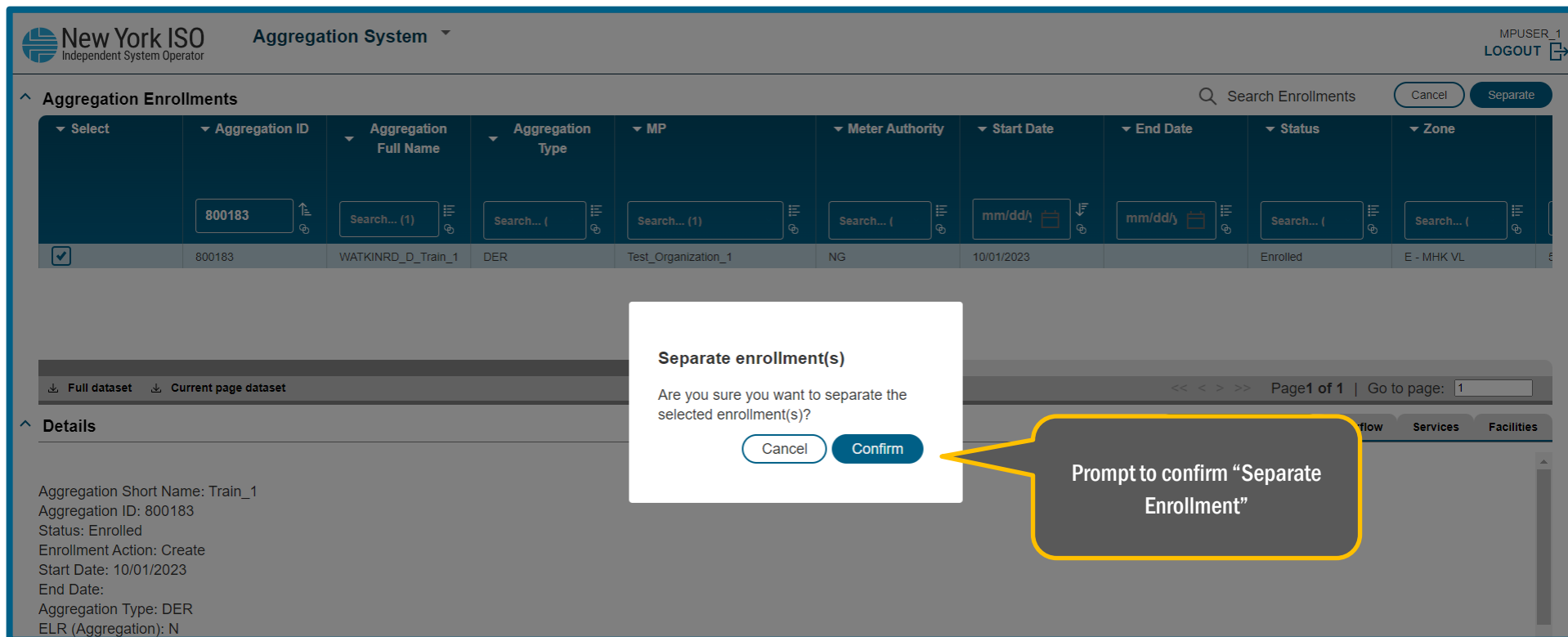
- Aggregation separated by the MP: Aggregators who wish to withdraw an Aggregation from the market, can do so using the “Separate Enrollment” feature in the Agg System
 - Example reasons for withdrawing from the market include long term outages or transitioning out of the DER and Aggregation Participation model
 - Is effective beginning 2 months from the date of action
 - If the “Separate Enrollment” is performed in April, the Aggregation will be withdrawn from the DER participation effective June 1st
 - Effective end date for the Aggregation and its facilities in the Agg system: last day of May
 - **Status of the Aggregation Enrollments screen: “Submitted for Separate” which then changes to “Separated”**



The screenshot shows the 'New York ISO Aggregation System' interface. At the top right, it displays 'MPUSER_1' and a 'LOGOUT' button. Below the header, there are action buttons: 'Create', 'Submit', 'Export Details', and 'Separate' (which is highlighted with a yellow box). The main content is a table titled 'Aggregation Enrollments' with the following columns: Aggregation ID, Aggregation Full Name, Aggregation Type, MP, Meter Authority, Start Date, End Date, Status, Zone, and Transmission Node P/TID. Two rows of data are visible:

Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node P/TID
800138	WHAVSTOR_D_Training1	DER	Test_Organization_1	O&R	08/01/2023		Unsubmitted	G - HUD VL	55557
800139	ROME_G_GenELRCLR	Generator	Test_Organization_1	NG	09/01/2023		Unsubmitted	E - MHK VL	80656

Separating an Aggregation



The screenshot shows the 'Aggregation System' interface. At the top, there is a search bar for 'Search Enrollments' and a 'Separate' button. Below this is a table of enrollment records. One record is selected, and a confirmation dialog is displayed over it.

Select	Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone
<input checked="" type="checkbox"/>	800183	WATKINRD_D_Train_1	DER	Test_Organization_1	NG	10/01/2023		Enrolled	E - MHK VL

Separate enrollment(s)

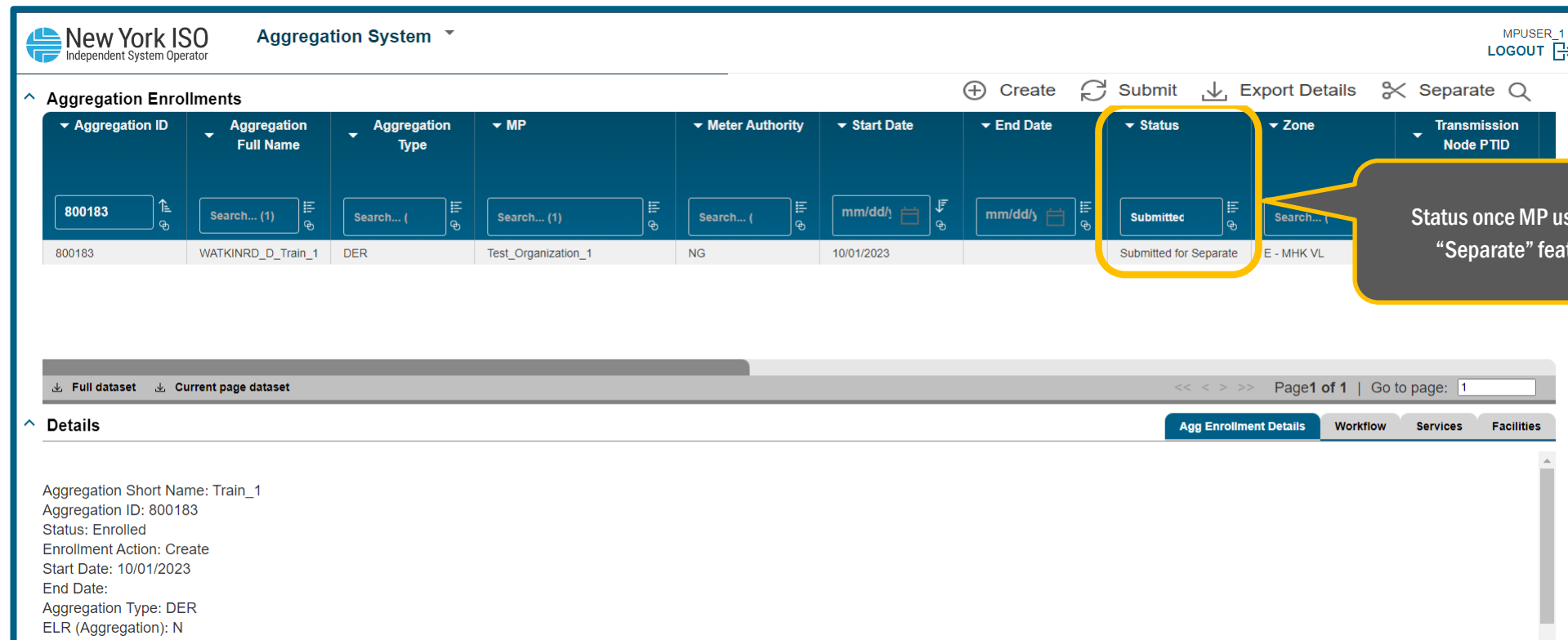
Are you sure you want to separate the selected enrollment(s)?

Prompt to confirm "Separate Enrollment"

Details

Aggregation Short Name: Train_1
 Aggregation ID: 800183
 Status: Enrolled
 Enrollment Action: Create
 Start Date: 10/01/2023
 End Date:
 Aggregation Type: DER
 ELR (Aggregation): N

Separating an Aggregation



New York ISO Aggregation System MPUSER_1 LOGOUT

Aggregation Enrollments + Create ↻ Submit ↓ Export Details ✂ Separate 🔍

Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Zone	Transmission Node PTID
800183	Search... (1)	Search... (1)	Search... (1)	Search... (1)	mm/dd/yy	mm/dd/yy	Submitted for Separate	Search... (1)	
800183	WATKINRD_D_Train_1	DER	Test_Organization_1	NG	10/01/2023			E - MHK VL	


Full dataset Current page dataset << < > >> Page 1 of 1 | Go to page: 1

Details Agg Enrollment Details Workflow Services Facilities

Aggregation Short Name: Train_1
 Aggregation ID: 800183
 Status: Enrolled
 Enrollment Action: Create
 Start Date: 10/01/2023
 End Date:
 Aggregation Type: DER
 ELR (Aggregation): N

Status once MP uses the "Separate" feature

Separating an Aggregation


Aggregation System

Search Enrollments
Create
Export Docs
Submit

Aggregation Enrollments

Aggregation ID	Aggregation Full Name	Aggregation Type	MP	Meter Authority	Start Date	End Date	Status	Facility	ELR
800032	MAPLEWOD_D_DER_AGG1	DER	Test_Organization_1	NG	09/01/2023		Separated	F - CAPITL	80458
800032	MAPLEWOD_D_DER_AGG1	DER	Test_Organization_1	NG	08/01/2023	08/31/2023	Enrolled	F - CAPITL	80458
800059	CHATEAUG_D_DER_AGG3	DER	Test_Organization_1	NYPA	08/01/2023		Pending NYISO Review	D - NORTH	355732
800059	CHATEAUG_D_DER_AGG3	DER	Test_Organization_1	NYPA	06/01/2023		Unsubmitted	D - NORTH	355732
800060	MAPLEWOD_D_DER_AGG2	DER	Test_Organization_1	NG	06/01/2023		Pending NYISO Review	F - CAPITL	80458
800071	ROME_E_ESR_AGG1	ESR	Test_Organization_1	NG	07/01/2023		Unsubmitted	E - MHK VL	80656

[Full dataset](#)
[Current page dataset](#)
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Details

[Agg Enrollment Details](#)
[Workflow](#)
[Services](#)
[Facilities](#)

Aggregation Short Name: Train_1
 Aggregation ID: 800183
 Status: Enrolled
 Enrollment Action: Create
 Start Date: 10/01/2023
 End Date:
 Aggregation Type: DER
 ELR (Aggregation): N

Info

All separations: The successful Separate of an Aggregation enrollment requires that bids for the Aggregations [800183] be removed from the System, and furthermore prohibits telemetry from being transmitted to or from the NYISO for the Separated Aggregation beginning on 2023-10-01.

Separating an Aggregation

- Aggregation separated by the NYISO:
 - Example reasons: Poor performance by Aggregations, done after NYISO’s Grid Operations team’s recommendation and communication between the DRO team and the Aggregator

If performed before Certification close for the following month	If performed after Certification close for the month
Withdrawal from the DER and Aggregation Participation model will be effective for the following month	Withdrawal from the DER and Aggregation Participation model will be effective for 2 months from then
Example: If performed during the Certification open period in April, withdrawal from the DER and Aggregation Participation model will be effective May 1 st	Example: If performed after the Certification open period in April, withdrawal from the DER and Aggregation Participation model will be effective June 1 st

- Certification period details for a month can be found on the ICAP Event Calendar found on the NYISO website
- NYISO will separate the Aggregation enrollment and email the Aggregator
- Status of the Aggregation Enrollments screen: Separated

Withdrawing a DER Facility

- **Facility withdrawn by the MP: Aggregators who wish to withdraw one or more facilities from their currently enrolled Aggregation can use the process described here**
 - Example reasons to separate one or more facilities may be poor performance of the facility in the Aggregation, the facility contract with the Aggregation is over or the facility is switching to another Aggregation or transitioning to another participation model
- **Aggregator will use the “Create Facility Enrollment”, download the template with data for the applicable Aggregation, and upload an updated file with the Aggregation ID removed from the facility that should be separated**
- **Aggregator will need to re-submit the Aggregation enrollment for the applicable Aggregation with the updated facilities enrollment template**
 - Changes will become effective after completion of NYISO review
 - The old enrollment will be end dated to the last day of the pending NYISO review month

ICAP Market Related Tasks



Submitting DMNC

- Aggregations participating in the Installed Capacity markets must submit their DMNC test data once every Capability Period (Summer and Winter)
 - Similar process to when initial DMNC test data is submitted during enrollment
- The time period and deadlines for DMNC test data submissions in the Agg System can be found in the ICAP Event Calendar
 - Similar to deadlines for other resource types
 - Out of period DMNC test data must be validated by in-period testing, in accordance with rules set forth in the tariff and the ICAP Manual
 - For more details, Refer to [Section 4.2 of the Installed Capacity manual: DMNC and DMGC Procedures](#)
- After the initial submission of DMNC for Aggregations with EDLs, DMNC submissions in subsequent Capability Period must be for a minimum of either
 - I. Its elected Energy Duration Limitation
 - II. Duration required by its technology type according to rules set forth in the ICAP Manual
 - Refer to the [ICAP Manual Section 4.2.2.2](#) for more details

ICAP and UCAP



- Read-only screen that has a summary of Aggregation level and facility level ICAP and UCAP calculations and other pertinent information for selected timeframes
- Records
- This includes, but is not limited to:
 - Aggregation Declared Value MW
 - Aggregation Post-Test Rating MW
 - Aggregation DMNC Status and MW amounts
 - Aggregation CRIS MW
 - Aggregation Derating Factor
 - Aggregation ICAP MW
 - Aggregation weighted CAF (%)
 - Aggregation Adjusted ICAP MW
 - Aggregation UCAP MW


ICAP and UCAP


 New York ISO
Independent System Operator
Aggregation System 
Enrollment
Transmission Nodes
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Asset Source Configuration
Aggregation Enrollments
Facility Enrollments
Workflow
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Capacity
Facility Seasonal Factors
DMNC
ICAP and UCAP
Aggregation Auction Sales
Facility Auction Sales
BSM Aggregation Buckets
BSM Facility Summary
Aggregation Annual Elections
Facility Annual Elections
Facility CRIS Monthly


ICAP and UCAP


Calculated Date	MP	Zone	Aggregation ID	Aggregation Name	Month	Capability Period	Capacity	Mitigated Capacity Zone	Status Filter
08/16/2023 16:00:20			86	AGG1	October 2023	Summer 2023	✓		
08/15/2023 16:00:47			40		23	Summer 2023	✓		
08/14/2023 17:13:16			140		23	Summer 2023	✓		
08/14/2023 17:13:11	Test_Org...	F - CAPITL	800141		23	Summ...			
08/16/2023 16:00:48	Test_Organization_1	F - CAPITL	800141		23	Summ...			


mm/dd/yy  


Search... (10) 

Search... (10) 

Search... () 

Search... () 



Search... () 

Search 

Select Capability Year

Select Capability Period

Select Capability Month

mm/dd/yyyy  mm/dd/yyyy 

Search

Clear Search

Full dataset Current page dataset

Clicking on the row of an Aggregation displays facility level Capacity information and CARC details for the Aggregation

Clicking on the teal panel displays the feature to Search by specific fields

Clicking the "spy glass" Search icon allows MP to search the records by Capability period, year and month

ICAP and UCAP

The Facilities tab contains Capacity information for all the facilities that are contained in the selected Aggregation, including facility level DMNC, Declared values, Facility % of Aggregation UCAP etc.

Details

Facility ID	Facility Name	Capacity	Facility Enrollment Status	DMNC Test Type	Has Response Type I Demand Reduction	Facility Declared Injection MW	Facility Declared Reduction MW
33	Solar_Array1	✓	Enrolled	DMNC		8	8
34	Solar_Array2	✓	Enrolled	DMNC		8	8
71	Panel_Set3	✓	Enrolled	DMNC		8	8

Full dataset | Current page dataset



Facility Average New EDL DMNC MW	Facility Non TS Average DMNC MW	Facility TS Minimum DMNC MW	Facility CRIS MW	Facility ICAP MW	Facility Seasonal Availability Factor (%)	Facility Percent of Aggregation UCAP (%)	Last Update Date	Last Updated By
	10.2		9.3	8	100.00	33.33	03/21/2025 12:15:43	NYISO
	9.5		9	8	100.00	33.33	03/21/2025 12:15:43	NYISO
	10.2		9.1	8	100.00	33.33	03/21/2025 12:15:43	NYISO

The CARC tab contains the Capacity Accreditation Resource Class (CARC) that the Aggregation is assigned to and the corresponding CAF %

Details

Aggregation ID	Month	Capability Period	CARC	CAF (%)	CARC Overflow	CARC E MW	Last Update Date
800016	March 2025	Winter 2024-2025	Solar	15.64			02/28/2025 16:02:06

Aggregation Auction Sales

- Read-only screen that has a summary of Aggregation level Auction sales for selected timeframes, mirroring values available in the ICAP AMS
- This includes:
 - Auction month
 - Available ICAP
 - Available UCAP for Sale
 - Auction and Bilateral Sales
 - Spot Market Auction Sales
 - Unsold MW
 - ICAP Sold for DAM MW



The screenshot shows the New York ISO Independent System Operator logo on the left. A yellow arrow points from the logo to the 'Aggregation System' dropdown menu. In the top right corner, the user is identified as 'MPUSER_1' with a 'LOGOUT' button and a refresh icon. The main navigation menu is divided into three columns: 'Enrollment', 'Workflow', and 'Capacity'. Under 'Enrollment', there are links for 'Transmission Nodes', 'Create Aggregations', 'Asset Source Configuration', 'Aggregation Enrollments', and 'Facility Enrollments'. Under 'Workflow', there is a link for 'Workflows'. Under 'Capacity', there are links for 'Facility Seasonal Factors', 'DMNC', 'ICAP and UCAP', 'Aggregation Auction Sales' (highlighted with a yellow box), and 'Facility Auction Sales'.

Aggregation Auction Sales

Aggregation Auction Sales

Aggregation ID	Aggregation Name	MP	Location	Zone	Auction Month	CRIS Market Activity Indicator	Available ICAP	Available UCAP for Sale	Auction and Bilateral Sales
800140		organization_1	ROS	CENTRL	August 2023		60		
800141		organization_1	ROS	CAPITL	August 2023		0.5		
800141		organization_1	ROS	CAPITL	September 2023	✓	0.428		
800148		organization_1	ROS	MHK VL	August 2023		25		
800148		organization_1	ROS	MHK VL	September 2023	✓	25		

Clicking on the teal panel displays the feature to Search by specific fields

Search

Select Capability Year

Select Capability Period

Select Capability Month

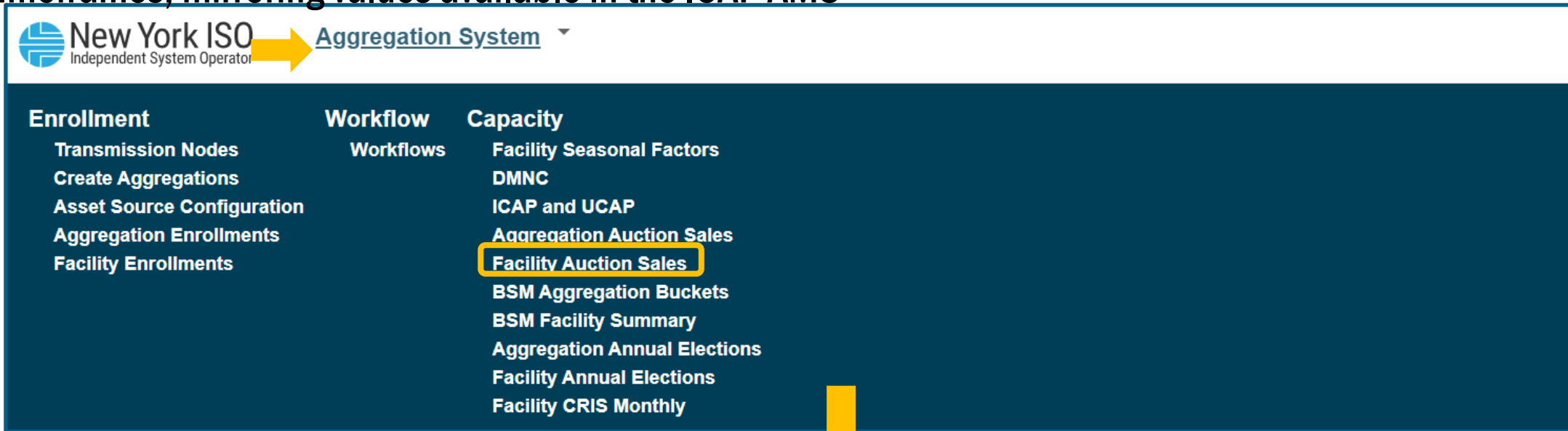
mm/dd/yyyy

mm/dd/yyyy

Clicking the "spy glass" Search icon allows MP to search the records by Capability Period, year and month

Facility Auction Sales

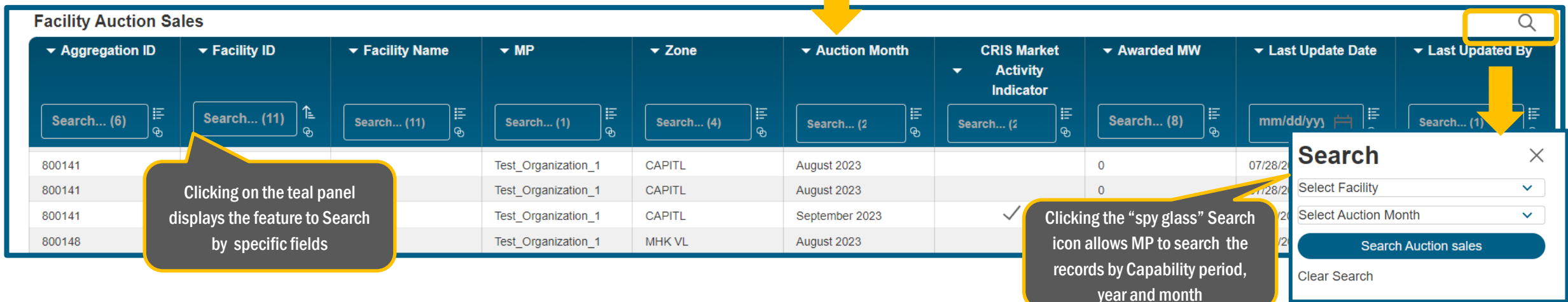
- Read-only screen that has information about the awarded UCAP MW per DER facility for selected timeframes, mirroring values available in the ICAP AMS



New York ISO Independent System Operator

Aggregation System

- Enrollment
 - Transmission Nodes
 - Create Aggregations
 - Asset Source Configuration
 - Aggregation Enrollments
 - Facility Enrollments
- Workflow
 - Workflows
- Capacity
 - Facility Seasonal Factors
 - DMNC
 - ICAP and UCAP
 - Aggregation Auction Sales
 - Facility Auction Sales**
 - BSM Aggregation Buckets
 - BSM Facility Summary
 - Aggregation Annual Elections
 - Facility Annual Elections
 - Facility CRIS Monthly



Facility Auction Sales

Aggregation ID	Facility ID	Facility Name	MP	Zone	Auction Month	CRIS Market Activity Indicator	Awarded MW	Last Update Date	Last Updated By
800141			Test_Organization_1	CAPITL	August 2023		0	07/28/23	
800141			Test_Organization_1	CAPITL	August 2023		0	07/28/23	
800141			Test_Organization_1	CAPITL	September 2023	✓			
800148			Test_Organization_1	MHK VL	August 2023				

Clicking on the teal panel displays the feature to Search by specific fields

Clicking the "spy glass" Search icon allows MP to search the records by Capability period, year and month

Facility Seasonal Factors

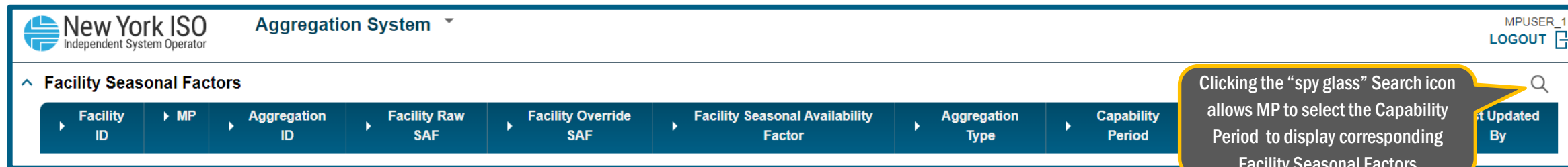
- Read-only screen that contains the Seasonal Availability factors for each facility that has been enrolled
 - Seasonal Availability factors are seasonal enrollment-based calculations required for ICAP/UCAP calculations for Installed Capacity market participation
 - Availability factors for each facility can be viewed at the Capability period level, and for every month contained within the Capability Period



The screenshot shows the New York ISO Aggregation System navigation menu. The 'Facility Seasonal Factors' option is highlighted with a yellow box. The menu is organized into three main categories: Enrollment, Workflow, and Capacity.

Enrollment	Workflow	Capacity
Transmission Nodes	Workflows	Facility Seasonal Factors
Create Aggregations		DMNC
Asset Source Configuration		ICAP and UCAP
Aggregation Enrollments		Aggregation Auction Sales
Facility Enrollments		Facility Auction Sales
		BSM Aggregation Buckets
		BSM Facility Summary
		Aggregation Annual Elections
		Facility Annual Elections
		Facility CRIS Monthly

Facility Seasonal Factors

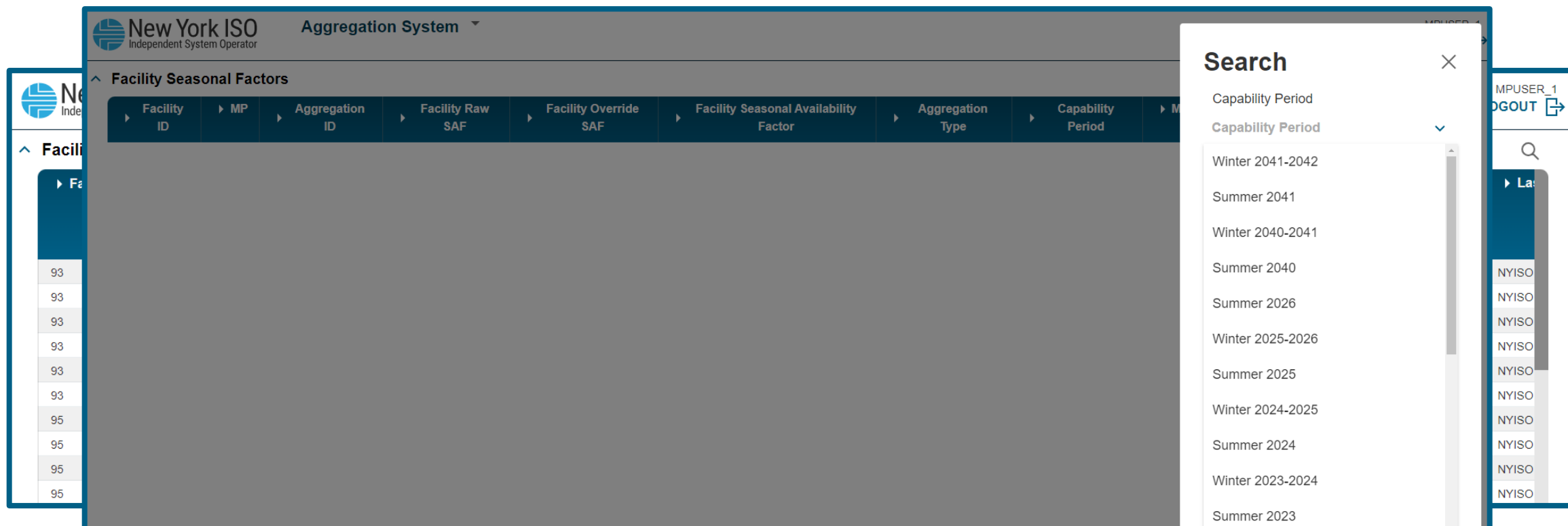


New York ISO Independent System Operator Aggregation System MPUSER_1 LOGOUT

Facility Seasonal Factors

- Facility ID
- MP
- Aggregation ID
- Facility Raw SAF
- Facility Override SAF
- Facility Seasonal Availability Factor
- Aggregation Type
- Capability Period
- Last Updated By

Clicking the "spy glass" Search icon allows MP to select the Capability Period to display corresponding Facility Seasonal Factors



New York ISO Independent System Operator Aggregation System MPUSER_1 LOGOUT

Facility Seasonal Factors

- Facility ID
- MP
- Aggregation ID
- Facility Raw SAF
- Facility Override SAF
- Facility Seasonal Availability Factor
- Aggregation Type
- Capability Period
- Last Updated By

Search

- Capability Period
- Capability Period
- Winter 2041-2042
- Summer 2041
- Winter 2040-2041
- Summer 2040
- Summer 2026
- Winter 2025-2026
- Summer 2025
- Winter 2024-2025
- Summer 2024
- Winter 2023-2024
- Summer 2023

Facility Seasonal Factors

The Availability Factor values for each facility that will be used in ICAP/UCAP calculations for the applicable Aggregation

Facility ID	MP	Aggregation ID	Facility Raw SAF	Facility Override SAF	Facility Seasonal Availability Factor	Aggregation Type	Capability Period	Month	Last Update Date	Last Update By
93	Test_Organization_1	800032			89.86	DER	Summer 2023	July 2023	11/15/2023 14:31:07	NYISO
93	Test_Organization_1	800032			89.86	DER	Summer 2023	August 2023	11/15/2023 14:31:07	NYISO
93	Test_Organization_1	800032			89.86	DER	Summer 2023	September 2023	11/15/2023 14:31:07	NYISO
93	Test_Organization_1	800032			89.86	DER	Summer 2023	August 2023	11/15/2023 14:31:07	NYISO
93	Test_Organization_1	800032			89.86	DER	Summer 2023	August 2023	11/15/2023 14:31:07	NYISO
93	Test_Organization_1	800032			89.86	DER	Summer 2023	October 2023	11/15/2023 14:31:07	NYISO
95	Test_Organization_1	800060			89.86	DER	Summer 2023	August 2023	11/15/2023 14:31:07	NYISO
95	Test_Organization_1	800060			89.86	DER	Summer 2023	July 2023	11/15/2023 14:31:07	NYISO
95	Test_Organization_1	800060			89.86	DER	Summer 2023	August 2023	11/15/2023 14:31:07	NYISO
95	Test_Organization_1	800060			89.86	DER	Summer 2023	August 2023	11/15/2023 14:31:07	NYISO

Raw SAF: System calculated
 Override SAF: NYISO entered values

Buyer Side Mitigation

- Certain DER (that can provide greater than 2MW injection on to the grid) located in NYISO’s Mitigated Capacity Zones (New York City and Zones G-J) may be subject to Buyer Side Mitigation, pursuant to NYISO tariff and procedures
 - DER that satisfy the goals specified in New York State Climate Leadership and Community Protection Act (CLCPA) are excluded from Buyer Side Mitigation evaluations
 - For example, Energy Storage Resources (ESRs), Demand Response, Wind and Solar Intermittent Power Resources are all excluded from BSM evaluations
- Two read-only screens in the Agg system that pertain to Buyer Side Mitigation:
 - BSM Facility Summary: Facility offer floor records for facilities that are subject to BSM
 - BSM Aggregation Buckets: Facilities grouped together by Offer floor within an Aggregation
- [Refer to Section 9.2.1 of the Aggregation Manual for more details on rules of BSM evaluations for DER](#)



BSM Facility Summary

- This screen contains Summer and Winter offer floor records and exempt/non-exempt MW data for DER for a selected Auction month
 - Screen is populated once Aggregation and facility's enrollment is submitted
 - By NYISO's Market Mitigation and Analysis team and the Distributed Resources Operations team

BSM Facility Summary Auction Month: **November 2023** 🔍

MP	Facility ID	Facility Name	Capability Period	Auction Month	Facility UCAP MW	Capacity	Summer Offer Floor \$	Winter Offer Floor \$	Start Month	End M
Test_Organization_1	251	Gen_01	Winter 2023-2024	November 2023	9.374	✓	\$7.00	\$23.00	November 2023	
Test_Organization_1	252	Gen_02	Winter 2023-2024	November 2023	14.123	✓	\$0.00	\$12.00	November 2023	

Summer and Winter offer floors for DER, if they are subject to BSM
 If not, system will create a \$0 value
 Excluded facilities will have a \$0 offer floor

System calculated value from the Enrollment file

Auction Month: **November 2023** 🔍

End Month	Initial Exempt MW	Exempt MW	Non-Exempt MW	Clearing History Month Count	Last Update Date	Last Updated By
	3.7					
	6.45					

Values entered by NYISO based on BSM evaluations for the corresponding Auction month

Iterative count from 1-12
 Total number of months that a DER facility with non-zero Offer floor has cleared the ICAP Auction market clearing price

BSM Aggregation Buckets

- This screen displays, for a selected Auction month,
 - Offer floor data at the Aggregation level
 - Aggregations buckets that contain DER within an Aggregation that are grouped together by offer floors
 - Auction awards MW from exempt and non-exempt MWs

BSM Aggregation Buckets									
Version	MP	Aggregation ID	Aggregation Name	Offer Floor \$	Non-Exempt MW	Exempt MW	Auction Month	Published Exempt MW	Published Non-Exempt MW
2	Test_Organization_1	800175	wind_MPU1	0	0	0	December 2023	0	0
1	Test_Organization_1	800175	wind_MPU1	0	0	0	December 2023	0	0
1	Test_Organization_1	800177	Test_MPU2	0	0	14	October 2023	0	0
2	Test_Organization_1	800177	Test_MPU2	0	0	14	November 2023	14	0

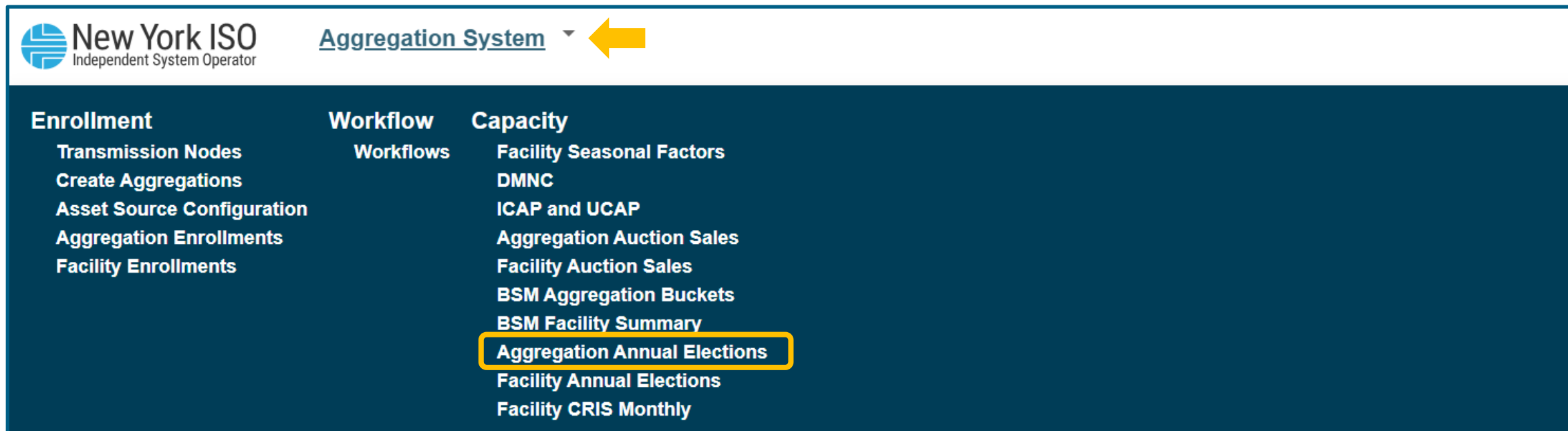
The various Aggregation buckets grouped by offer floor values for DER facilities within an Aggregation

Awards from Exempt MW	Awards from Non-Exempt MW	Total Bucket Awards MW	Last Update Date	Last Updated By
		0	11/21/2023 14:10:40	NYISO
			11/17/2023 13:51:49	NYISO
			09/29/2023 16:44:40	NYISO
		0	10/06/2023 10:54:00	NYISO

Auction awards for Exempt and Non-Exempt MWs for each Aggregation bucket, for selected Auction month

Aggregation Annual Elections

- Screen for Aggregators to view their Aggregation Annual election for Energy Duration Limitation (EDL), as well as update/create the Annual election for the upcoming Capability Year during the open “Agg Annual Election” window
 - Please refer to Section 2.2.5 of the Aggregation Manual for rules relating to Annual Election Obligations for Aggregations and facilities



New York ISO
Independent System Operator

Aggregation System ▾ ←

Enrollment	Workflow	Capacity
Transmission Nodes	Workflows	Facility Seasonal Factors
Create Aggregations		DMNC
Asset Source Configuration		ICAP and UCAP
Aggregation Enrollments		Aggregation Auction Sales
Facility Enrollments		Facility Auction Sales
		BSM Aggregation Buckets
		BSM Facility Summary
		Aggregation Annual Elections
		Facility Annual Elections
		Facility CRIS Monthly

Aggregation Annual Elections

Aggregation Annual Elections

[+ Create Annual Election](#)

MP	Aggregation ID	EDL	Capability Year	Start Date	End Date	Update	Last Update Date	Last Updated By
	800048	6	2025-2026	05/01/2025	04/30/2026	Update	09/25/2024 11:39:51	NYISO
	800048	6	2024-2025	10/01/2024	04/30/2025	Update	09/25/2024 11:39:51	NYISO

Click on the Create Annual Election button to initiate the creation of a new record

Create Aggregation Annual Election

Aggregation ID

Capability Year

EDL

Aggregator can select the Aggregation ID and the corresponding EDL for the upcoming Capability Year

Aggregation Annual Elections

New York ISO Independent System Operator Aggregation System BDONNELL LOGOUT

Aggregation Annual Elections + Create Annual Election

MP	Aggregation ID	EDL	Capability Year	Start Date	End Date	Update	Last Update Date	Last Updated By
	800048	6	2025-2026	05/01/2025	04/30/2026	Update	09/25/2024 11:39:51	NYISO
	800048	6	2024-2025	10/01/2024	04/30/2025	Update	09/25/2024 11:39:51	NYISO

Update Aggregation Annual Election: 800048

EDL

6

Clear EDL

2

4

6

8

Update Aggregation Annual Election: 800048

EDL

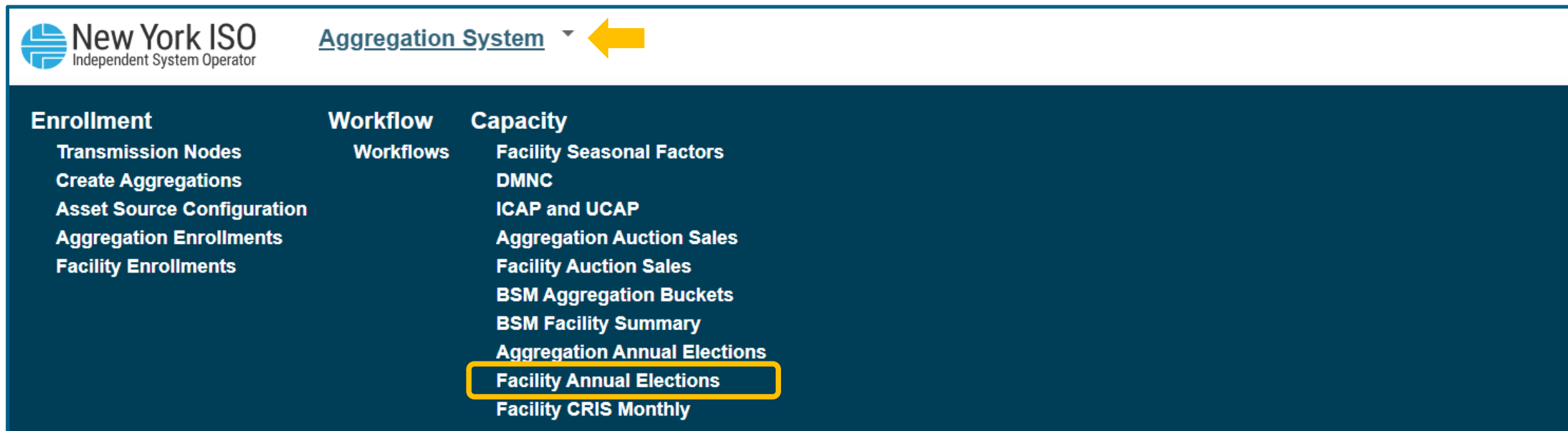
6

Cancel Save

Aggregators can also update their Aggregation Annual Election for EDL election during the open Aggregation Annual Election window

Facility Annual Elections

- Screen for Aggregators to view their Annual Election for all facilities making up one or all the Aggregations in their portfolio, as well as update/create the Annual election for the upcoming Capability Year during the open “Agg Annual Election” window
 - Please refer to Section 2.2.5 of the Aggregation Manual for rules relating to Annual Election Obligations for Aggregations and facilities



New York ISO
Independent System Operator

Aggregation System ▾ ←

Enrollment	Workflow	Capacity
Transmission Nodes	Workflows	Facility Seasonal Factors
Create Aggregations		DMNC
Asset Source Configuration		ICAP and UCAP
Aggregation Enrollments		Aggregation Auction Sales
Facility Enrollments		Facility Auction Sales
		BSM Aggregation Buckets
		BSM Facility Summary
		Aggregation Annual Elections
		Facility Annual Elections
		Facility CRIS Monthly

Facility Annual Election

Facility Annual Elections										+	Create Annual Election	Q
MP	Facility ID	Electing Aggregation Participation	Aggregation Type	Electing Retail Load Modifier	Capability Year	Start Date	End Date	Status	Update			
	94	✓	DER		2025-2026	05/01/2025	04/30/2026	Accepted	Update			09/2
	94	✓	DER		2024-2025	10/01/2024	04/30/2025	Accepted	Update			09/2

Click on the Create Annual Election button to initiate the creation of a new record

Create Facility Annual Election

Facility ID

Capability Year

Electing Aggregation Participation

Aggregation Type

Electing Retail Load Modifier

For each Facility ID selected and the Capability Year selected, Aggregators can:

1. Indicate whether the facility is electing DER Participation or is electing to leave the model
2. Select the type of Aggregation that the facility will be part of
3. Indicate whether the facility is leaving the DER and Aggregation Participation model to participate as a Retail Load Modifier

Facility Annual Election

Facility Annual Elections

[+ Create Annual Election](#)

MP	Facility ID ↑	Electing Aggregation Participation	Aggregation Type	Electing Retail Load Modifier	Capability Year	Start Date ↓	End Date	Status	Update
	94	<input checked="" type="checkbox"/>	DER		2025-2026	05/01/2025	04/30/2026	Accepted	Update
	94	<input checked="" type="checkbox"/>	DER		2024-2025	10/01/2024	04/30/2025	Accepted	Update

Update Facility Annual Election: 94

Electing Aggregation Participation

Aggregation Type

DER ↓

Electing Retail Load Modifier

Cancel

Save

Update Facility Annual Election: 94

Electing Aggregation Participation

Aggregation Type

DER ↓

Clear Aggregation Type

DER

ESR

Generator

Landfill Gas

LESR

Solar

Wind

For each Facility ID selected and the Capability Year selected, Aggregators can:

1. Indicate whether the facility is electing DER Participation or is electing to leave the model
2. Select the type of Aggregation that the facility will be part of
3. Indicate whether the facility is leaving the DER and Aggregation Participation model to participate as a Retail Load Modifier

Facility CRIS Monthly

- Read-only screen that allows Aggregator to view monthly CRIS related information for facilities in their portfolio
- For each facility, information fields include:
 - Auction month
 - CRIS Unique ID
 - Awarded Summer and Winter CRIS MW
 - Active Summer and Winter CRIS MW
 - CRIS Expiration Date
 - CRIS Award Date



The screenshot shows the New York ISO Aggregation System navigation menu. The menu is organized into three columns: Enrollment, Workflow, and Capacity. The 'Facility CRIS Monthly' option is highlighted with a yellow box. A yellow arrow points to the 'Aggregation System' dropdown menu.

Enrollment	Workflow	Capacity
Transmission Nodes	Workflows	Facility Seasonal Factors
Create Aggregations		DMNC
Asset Source Configuration		ICAP and UCAP
Aggregation Enrollments		Aggregation Auction Sales
Facility Enrollments		Facility Auction Sales
		BSM Aggregation Buckets
		BSM Facility Summary
		Aggregation Annual Elections
		Facility Annual Elections
		Facility CRIS Monthly

Facility CRIS Monthly

Auction Month	Facility ID	Facility Name	CRIS Unique ID	Aggregation ID	CRIS MW	Awarded Summer CRIS MW	Awarded Winter CRIS MW
March 2025	11	ESR_5W1	01096	800013		5	5
March 2025	13	ESR_10W2	01097	800013		10	10

Original Active Summer CRIS MW	Original Active Winter CRIS MW	New Active Summer CRIS MW	New Active Winter CRIS MW	Original Status	New Status	Facility CRIS Utilization Ratio	Original Months Under Utilization Threshold
				Active	Active	0.00	
				Active	Active	0.00	

New Months Under Utilization Threshold	Original CRIS Expiration Date	New CRIS Expiration Date	Published	CRIS Award Date	Synchronization Date	Last Update Date	Last Updated By
2			03/17/2025 15:15:36	12/01/2024	01/01/2024	03/17/2025 15:15:36	NYISO
2			03/17/2025 15:15:37	12/01/2024	01/01/2024	03/17/2025 15:15:37	NYISO



Summary: Presentation Topics

- Introduction to the Agg System
 - Access to the Agg System
- Enrollment of new Aggregations and facilities
 - Submission of facilities and Aggregation enrollment
 - Initial NYISO Validation
 - Distribution Utility Review
 - NYISO Review
 - Post Enrollment Set up for Participation
- Enrollment actions for Installed Capacity Market Participation
 - DMNC submission and validation
- Management of Enrollments
 - Separating an Aggregation/ facility
 - ICAP Market related tasks
- Additional References

Additional References

- **Tariff:**
 - Market Administration and Control Area Services Tariff
- **Manuals:**
 - Aggregation Manual
 - Installed Capacity Manual
 - Control Center Requirements Manual
- **User's Guides:**
 - Aggregation System User's Guide
- **Market Training materials:**
 - DER Onboarding Educational Suite

Questions?

For any future assistance, please contact NYISO Stakeholder Services at stakeholder_services@nyiso.com or by phone at (518) 356-6060