

# **RESOURCE APPENDIX: ONBOARDING OF NEW NYISO RESOURCES**

[IPR Participation](#)

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***Disclaimer***

The information contained within this guide, along with the other NYISO documents, is intended to be used for informational purposes and is subject to change. The NYISO is not responsible for the user's reliance on these publications or for any erroneous or misleading material.

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# 1. NYISO'S INTERCONNECTION PROCESS

## A. TRANSMISSION EXPANSION INTERCONNECTION MANUAL

The purpose of this Transmission Expansion and Interconnection Manual (“TEI Manual”) is to provide interested parties with a road map of the NYISO’s transmission expansion and interconnection process. The manual also describes the study criteria, guidelines, procedures, and practices used in the processes.

**Navigation Path:**

NYISO Website → Manuals, Tech Bulletins & Guides → Manuals → Planning → Transmission Expansion and Interconnection Manual

## B. TRANSMISSION EXPANSION AND INTERCONNECTION GUIDE

The purpose of this guide is to provide developers with an introduction to and a high-level summary of various NYISO interconnection procedures.

**Navigation Path:**

NYISO Website → Manuals, Tech Bulletins & Guides → Guides → Transmission Expansion and Interconnection Guide

## C. NYISO TARIFF – OPEN ACCESS & TRANSMISSION TARIFF (OATT)

This eLearning module defines “Outage Scheduling,” and covers the basis for NYISO Outage Scheduling Process. This training also features:

- Attachment X: Large Facility Interconnection Procedures
- Attachment Z: Small Facility Interconnection Procedures
- Attachment S: Rules to allocate responsibility for the cost of New Interconnection Studies

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → OATT

## 1.1 BUYER-SIDE MITIGATION

### A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including services relating:

- Attachment H, ISO Market Power Mitigation Measures

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST



## 2. NYISO CUSTOMER REGISTRATION

### A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including services relating:

- Section 9 Application and Registration Procedure
- Attachment K: Creditworthiness Requirements for Customers

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

### B. REFERENCE DOCUMENTATION ON NYISO CUSTOMER SUPPORT WEBPAGE

- NAESB Digital Certificate Tutorial
- MIS Access
- Admin set up
- Linking Certificates with MIS
- Member Community Reference Guide
- Member Community Access

**Navigation Path:**

NYISO Website → Support

### C. TECH BULLETIN #116

This Technical Bulletin describes procedures for new generating units to operate in testing mode prior to commercial operation.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Technical Bulletins → New Generation Units Operating During the Start-Up Testing Phase

### D. WIND AND SOLAR PLANT OPERATOR DATA USER'S GUIDE

This guide focuses on the data reporting required of Intermittent Power Resources that depend on wind or solar energy as their fuel to support the integration of renewable energy into the New York Control Area.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides → Wind and Solar Plant Operator Data User's Guide

### E. TECH BULLETIN #154

This Technical Bulletin identifies market rules for wind and solar resources pertaining to bidding, scheduling, and settlements for energy. This Technical Bulletin assumes prior knowledge of NYISO bidding processes.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Technical Bulletins → Wind and Solar Resource Bidding, Scheduling, Dispatch, and Settlements

# 3. ESTABLISHMENT OF WIND AND SOLAR FORECASTS

## A. WIND AND SOLAR PLANT OPERATOR DATA USER'S GUIDE

This guide focuses on the data reporting required of Intermittent Power Resources that depend on wind or solar energy as their fuel to support the integration of renewable energy into the New York Control Area.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides →  
Wind and Solar Plant Operator Data User's Guide

# 4. CREDIT REQUIREMENTS

## A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including services relating:

- Attachment K Creditworthiness Requirements for Customers

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

## B. CREDIT DEPARTMENT FAQ

The NYISO Credit FAQ Document covers the following topics:

- Collateral
- Cash Deposits
- Letter of Credit
- Surety Bonds
- Credit Management System (CMS)
- Annual/Periodic Submissions
- New Applicants – Items needed for Credit Approval

**Navigation Path:**

NYISO Website → Support → Budget & Finance → NYISO Credit → NYISO Credit FAQ

# 5. COMMUNICATIONS TESTING & OPERATIONS MODELING

## A. WIND AND SOLAR PLANT OPERATOR DATA USER'S GUIDE

This guide focuses on the data reporting required of Intermittent Power Resources that depend on wind or solar energy as their fuel to support the integration of renewable energy into the New York Control Area.

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides → Wind and Solar Plant Operator Data User's Guide

## B. CONTROL CENTER REQUIREMENTS MANUAL

This Manual focuses on the computer, communications, and metering systems required for reliable and economic operations of the New York Independent System Operator (NYISO).

- *Computer Systems*
- *Metering Policy and Certification*
- *Voice Communications*

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Control Center Requirements

## C. DIRECT COMMUNICATIONS PROCEDURE

The Direct Communications Procedure describes the communication options available to generation owners, demand-side resources, limited energy storage resources, and other suppliers that provide energy and ancillary services to the NYISO markets; outlines the Initial Installation Procedure; and documents Operational Procedures for communications facilities.

- The Direct Communications Procedure is a secured document not available on the NYISO website. To request authorization to receive the Direct Communications Procedure, please contact [Stakeholder\\_services@nyiso.com](mailto:Stakeholder_services@nyiso.com)

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals  
→ Operations → Direct Communications Manual

## D. NEW GENERATION UNITS OPERATING DURING THE START-UP TESTING PHASE

This Technical Bulletin describes procedures for new generating units to operate in testing mode prior to commercial operation.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Technical Bulletins → TB 116 – New Generation Units Operating During the Start-Up Testing Phase

# 6. MARKET MITIGATION & ANALYSIS: ENERGY REFERENCE LEVELS

## A. NAESB DIGITAL CERTIFICATE TUTORIAL

This e-Learning module is geared toward guiding Market Participants (MPs) on how to obtain and implement the use of a digital certificate to access NYISO markets and applications.

**Navigation Path:**

NYISO Website → Training → Online Learning → NAESB Digital Certificate Tutorial

## B. REFERENCE LEVEL MANUAL

This manual describes the NYISO's Reference Level Processes and details various timelines that apply to the submission, review, approval, and update of cost-based data and to mitigation consultations.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Operations → Reference Level Manual

## C. REFERENCE LEVEL SOFTWARE USER'S GUIDE

This user guide is intended for Market Participants (MPs) who are users of the NYISO Reference Level Software (RLS) application.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides → Reference Level Software User's Guide

## D. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including services relating:

- Attachment H, ISO Market Power Mitigation Measures

### **Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST



# 7. OUTAGE SCHEDULING

## A. NYISO TARIFF – OPEN ACCESS & TRANSMISSION TARIFF (OATT)

This eLearning module defines “Outage Scheduling,” and covers the basis for NYISO Outage Scheduling Process. This training also features:

- Section 9.6, Transmission Reliability Margin (“TRM”)

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → OATT

## B. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including services relating:

- *Section 5.18 Generator Outages and Generator Obligations While in These Outages*
- *Section 5.12 Requirements Applicable to Installed Capacity Suppliers*

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST

## C. OUTAGE SCHEDULING MANUAL

This Outage Scheduling Manual is intended for the New York Independent System Operator (NYISO) staff and those entities who are responsible for

notifying the NYISO of planned and unexpected changes to the operational availability of their transmission and generating facilities.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Outage Scheduling Manual

## D. OUTAGE SCHEDULER USER'S GUIDE

This user guide is intended for Market Participants (MPs) and Transmission Owners (TOs) who are users of the NYISO Outage Scheduler (OMS) System.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides → Outage Scheduler User's Guide

## E. MARKET PARTICIPANTS USER GUIDE

This Guide provides Market Participants with the information needed to participate in New York Independent System Operator (NYISO) Markets.

- *Section 7.4 Generator and Ancillary Services Bids*

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Guides → Market Participant User's Guide

## F. INSTALLED CAPACITY MANUAL

The Installed Capacity Manual contains the procedures that will be followed by the NYISO and its Customers with regard to the Installed Capacity markets and auctions administered by the NYISO pursuant to the NYISO Market Administration and Control Area Services Tariff (Services Tariff).

- *Section 4.3 Maintenance Scheduling Requirements*
- *Section 4.8 Bidding, Scheduling, and Notification Requirements*
- *Attachment K: Reportable Operating Data*

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals  
→ Operations → Installed Capacity Manual

## G. OUTAGE SCHEDULER TRAINING: OUTAGE SCHEDULER (OMS) SYSTEM – GENERATOR OWNER (GO) EDITION

This e-Learning module provides a walk-through of the Outage Scheduler (OMS) System for Generator Owners. Topics covered include accessing and logging into the OMS System, environment navigation, creating a new outage request (Generation O.R.E.), tracking a request, as well as modifying a request.

**Navigation Path:**

NYISO Website → Training → Online Learning → Outage Scheduler (OMS) System → Generator Owner (GO) Edition

## H. OUTAGE SCHEDULER TRAINING: OUTAGE SCHEDULER (OMS) SYSTEM – TRANSMISSION OWNER (TO) EDITION

This e-Learning module provides a walk-through of the Outage Scheduler (OMS) System for Transmission Owners. Topics covered include accessing and logging into the OMS System, environment navigation, accessing the conflict calendar, creating a new outage request (Transmission O.R.E.), tracking a request, as well as modifying a request.

**Navigation Path:**

NYISO Website → Training → Online Learning → Outage Scheduler (OMS) System → Transmission Owner (TO) Edition

# 8. METERING CONFIGURATION

## A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including services relating:

- 13 Metering

**Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST → Metering 13

## B. REVENUE METERING REQUIREMENTS MANUAL

The material in this manual defines the standards for the revenue metering systems required for conducting accurate financial settlements of the New York Independent System Operator, Inc. (NYISO) – administered wholesale electric energy markets. Additionally, it defines the responsibilities for Meter Authorities (MA) and describes the processes for data processing, analysis, and dispute resolution.

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Revenue Metering Requirements

## C. CONTROL CENTER REQUIREMENTS MANUAL

This Manual focuses on the computer, communications, and metering systems required for reliable and economic operations of the New York Independent System Operator (NYISO).

- Computer Systems
- Metering Policy and Certification
- Voice Communications

### **Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals  
→ Administrative → Control Center Requirements

# 9. METERING FOR SETTLEMENTS

## A. NYISO TARIFF – MARKET ADMINISTRATION AND CONTROL AREA SERVICES TARIFF (MST)

This document sets forth the provisions applicable to the services provided by the ISO related to its administration of competitive markets for the sale and purchase of Energy and Capacity and for the payments to Suppliers who provide Ancillary Services to the ISO in the ISO Administered Markets (“Market Services”) and the ISO’s provision of Control Area Services (“Control Area Services”), including services relating:

- 13 Metering

### **Navigation Path:**

NYISO Website → Library → Regulatory Resources → Tariffs, FERC Filings & Orders → Tariffs → MST → Metering 13.2.4

## B. REVENUE METERING REQUIREMENTS MANUAL

The material in this manual defines the standards for the revenue metering systems required for conducting accurate financial settlements of the New York Independent System Operator, Inc. (NYISO) – administered wholesale electric energy markets. Additionally, it defines the responsibilities for Meter Authorities (MA) and describes the processes for data processing, analysis, and dispute resolution.

### **Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Revenue Metering Requirements

## C. CONTROL CENTER REQUIREMENTS MANUAL

This Manual focuses on the computer, communications, and metering systems required for reliable and economic operations of the New York Independent System Operator (NYISO).

- Computer Systems
- Metering Policy and Certification
- Voice Communications

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Control Center Requirements

## D. ACCOUNTING & BILLING MT-304 COURSE MATERIALS

This course provides detailed knowledge of the settlements associated with Power Suppliers, Load Serving Entities, Transactions, Virtual Trading, Demand Response and Transmission Owners.

- Metering Fundamentals
- Settlements Reports Overview

### Navigation Path:

NYISO Website → Training → Course Materials & Infographics → Training Course Materials → Accounting & Billing MT-304

## E. METER DATA SUBMISSION TIMELINE

The Meter Data Review section of the website hosts the following information in PDF:

- Daily Lock-down Schedule
- Meter System Contacts
- Hourly Tie-line Generator, LSE Bus Meter Data Revision, & Lock-down Schedule
- Meter Data Management Protocols

### Navigation Path:

NYISO Website → Support → Budget & Finance → Billing & Settlements → Processing and Invoice Schedule → Meter Data Review

## F. PROCESSING AND INVOICE SCHEDULING

This schedule provides dates for the following:

- 4-Month Cycle Settlement Months
- NYISO Flexible Billing Period Invoice

### Navigation Path:

NYISO Website → Support → Budget & Finance → Billing & Settlements → Processing and Invoice Schedule → Close-out Schedule

NYISO Website → Support → Budget & Finance → Billing & Settlements → Processing and Invoice Schedule → Flexible Invoicing Schedule

## G. ACCOUNTING & BILLING MANUAL

This document focuses on the settlement, invoicing and clearing processes for wholesale market transactions encompassing the NYISO-administered Energy, Transmission Service, and Ancillary Services markets.

- *Section 4.1.3.2: Adjustment of Actual Energy Injections and Actual Energy Withdrawals to Revenue Quality Metered Values*

### Navigation Path:

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Accounting and Billing



# 10. INSTALLED CAPACITY (ICAP) ENROLLMENT FOR PARTICIPATION

## A. INSTALLED CAPACITY MANUAL

The Installed Capacity Manual contains the procedures that will be followed by the NYISO and its Customers with regard to the Installed Capacity markets and auctions administered by the NYISO pursuant to the NYISO Market Administration and Control Area Services Tariff (Services Tariff).

- *Attachment D: Dependable Maximum Net Capability (DMNC)*
- *Attachment F: Intent to Offer Letter*

### **Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals  
→ Operations → Installed Capacity Manual

# 11. SETTLEMENTS

## A. ACCOUNTING AND BILLING MANUAL

This document focuses on the settlement, invoicing and clearing processes for wholesale market transactions encompassing the NYISO-administered Energy, Transmission Service, and Ancillary Services markets.

- *Section 1 Settlement and Invoicing Process*
- *Section 2 Market Participant Responsibilities and Controls*

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Accounting and Billing

## B. REVENUE METERING REQUIREMENTS MANUAL

Services Tariff Section 13 permits Member Systems and third parties – known as Meter Services Entities (MSEs) – to provide metering and meter data services to Demand Reduction Providers, DSASP Providers, Responsible Interface Parties (RIPs) and Curtailment Service Providers (CSPs).

**Navigation Path:**

NYISO Website → Library → Manuals, Tech Bulletins & Guides → Manuals → Administrative → Revenue Metering Requirements

## C. BUSINESS INTELLIGENCE TASK FORCE (BITF) PRESENTATIONS

BITF is a forum for stakeholders to exchange information pertaining to NYISO software enhancements and associated software training courses.

**Navigation Path:**

NYISO Website → Committees → Business Issues Committee → Business Intelligence Task Force

## D. DECISION SUPPORT SYSTEM (DSS) TRAINING

Series of four eLearning modules that encompass:

- **Session 1:** This e-Learning module explains the purpose and benefits behind DSS, identifies reports available, and explains how to access it.
- **Session 2:** This e-Learning module steps through logging into DSS, the DSS homepage options, resources within DSS, and DSS data versioning.
- **Session 3:** This e-Learning module demonstrates how to access DSS corporate reports, utilize Automated Data Delivery Files, and identified supporting documentation.
- **Session 4:** This e-Learning module explains the organization of DSS Data, and teaches basic custom query building.

**Navigation Path:**

NYISO Website → Training → Online Learning → DSS

# 12. ADDITIONAL RESOURCES FOR IPR

## A. STATION POWER TRAINING MODULE

This intermediate level e-Learning module explains the function of Station Power, various types of Station Power, requirements for Station Power, as well as the registration process for participation in the Station Power Program.

**Navigation Path:**

NYISO Website → Training → Online Learning → Energy Storage Resources Participation Model

## B. STATION POWER METERING, DATA AND PROGRAM REQUIREMENTS

This intermediate level e-Learning module explains the function of Station Power, various types of Station Power, requirements for Station Power, as well as the registration process for participation in the Station Power Program.

**Navigation Path:**

NYISO Website → Training → Online Learning → Energy Storage Resources Participation Model

# 13. CONTACT INFORMATION

## A. STAKEHOLDER SERVICES

Contact: [stakeholder\\_services@nyiso.com](mailto:stakeholder_services@nyiso.com)

## B. CUSTOMER REGISTRATION

Contact: [customer\\_registration@nyiso.com](mailto:customer_registration@nyiso.com)