
Guide to Capacity Auction Activities via Online IESO

June 2025

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AN IESO MARKETPLACE TRAINING PUBLICATION

This guide has been prepared to assist in the IESO training of market participants and has been compiled from extracts from the market rules or documents posted on the web site of Ontario's Independent Electricity System Operator. Users of this guide are reminded that they remain responsible for complying with all of their obligations under the market rules and associated policies, standards and procedures relating to the subject matter of this guide, even if such obligations are not specifically referred to herein. While every effort has been made to ensure the provisions of this guide are accurate and up to date, users must be aware that the specific provisions of the market rules or particular document shall govern.

Attention: Customer Relations

The Independent Electricity System Operator Box 4474, Station A

Toronto, Ontario M5W 4E5

Customer Relations: Tel: (905) 403-6900

Toll Free 1-888-448-7777

Website: www.ieso.ca

This issue of the Guide to Capacity Auction Activities via Online IESO outlines how organizations can complete key activities in order to participate in the Capacity Auction.

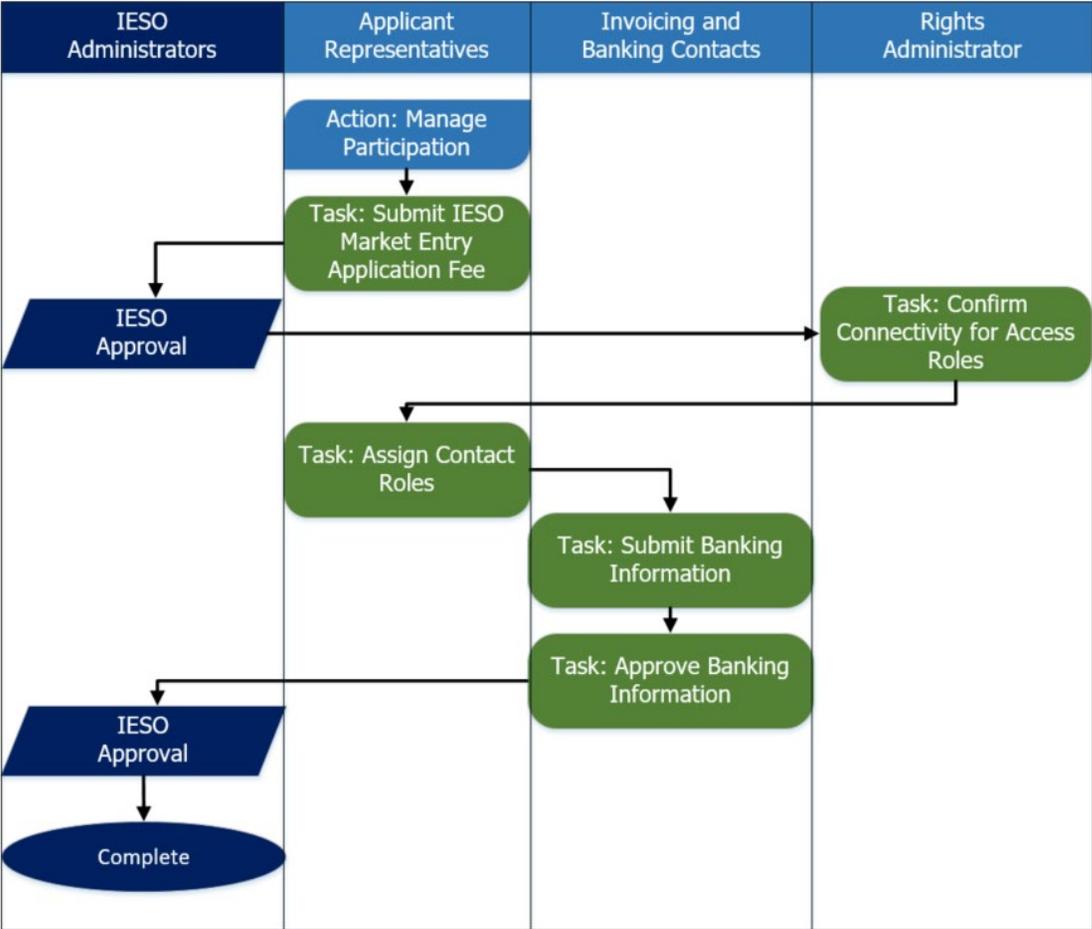
The timelines for each of the milestones that need to be completed for participating in the auction are provided in the “Capacity Auction Timelines” document posted on the [webpage](#).

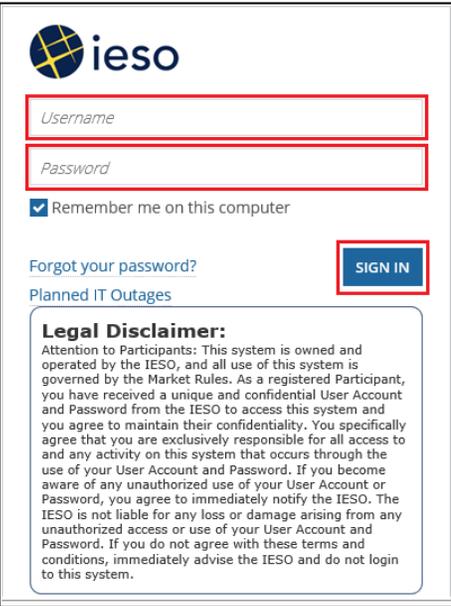
Note:

The Market Participant must have an active Gateway account and must be assigned to an appropriate a contact role(s) to complete these activities. Once the Market Participant is assigned to a contact role(s), it may take a day for the IESO system to process the change. Refer to the [IESO Gateway User Guide](#) if you do not have an existing active Gateway account.

1. How to Authorize as a Capacity Auction Participant

The following chapter provides an overview, followed by step-by-step screen captures, describing how to authorize as a capacity auction participant (CAP) using the Online IESO web-based registration system

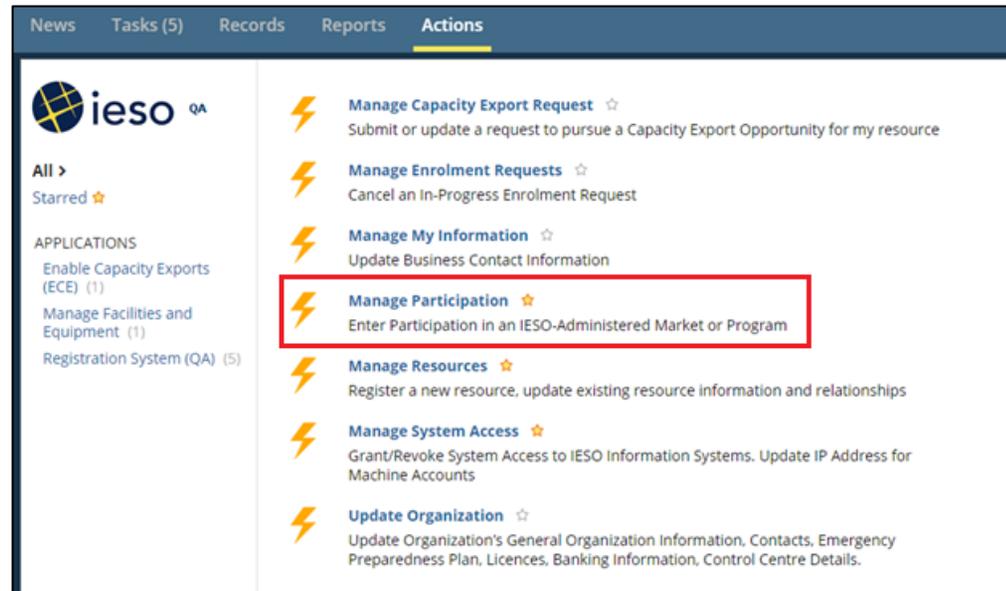


Step	Instruction	Picture
1	<p data-bbox="310 250 684 277">Action: Manage Participation</p> <p data-bbox="310 305 674 440">An Applicant Representative Logs in to the Online IESO web-based registration system using this link.</p> <p data-bbox="310 467 674 527">Enter your Username and Password and click Sign In.</p> <p data-bbox="310 555 684 651">A new user needs to activate their gateway account to access Online IESO.</p>	

Step	Instruction	Picture
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2 Click **Actions** on the menu bar at the top of the screen.

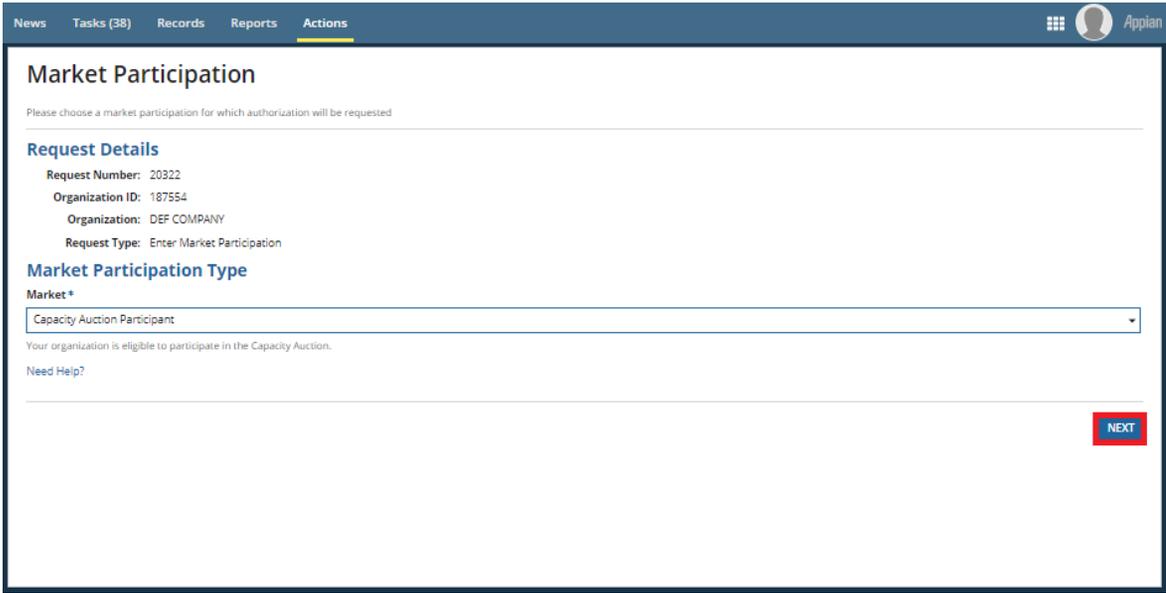
Click **Manage Participation** from the list of available action items displayed on the subsequent screen.



3 The **Choose Organization** screen is displayed.

Select the check box corresponding to the organization that you wish to become authorized as a capacity auction participant (CAP), and click **Next**.



Step	Instruction	Picture
4	<p>The Select Participation Type screen is displayed.</p> <p>In the Action to Complete drop-down list, select Enter Market Participation, and click Next.</p>	
5	<p>The Market Participation screen is displayed.</p> <p>In the Market Participation Type drop-down list, select Capacity Auction Participant, and click Next.</p>	

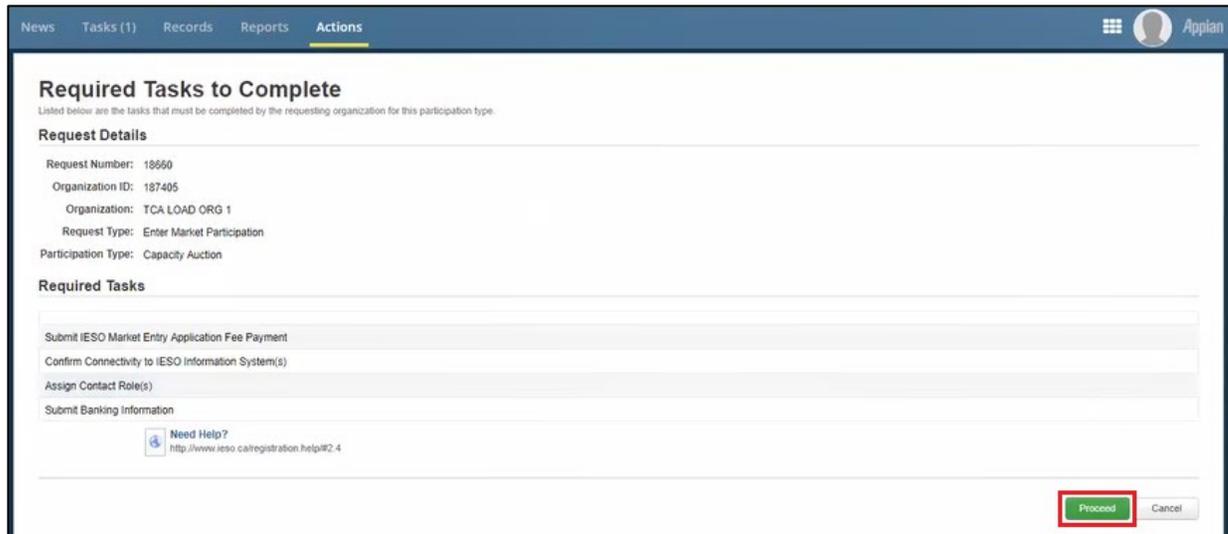
Step	Instruction	Picture
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6 The **Required Tasks to Complete** screen is displayed for your review – click **Proceed**.

Note: The following required tasks are applicable only to organizations with new Demand Response Resources:

- Submit IESO Market Entry Application Fee Payment (Applicant Representative)
- Confirm Connectivity to IESO Information System(s) (Rights Administrator)
- Assign Contact Role(s) (Applicant Representative)
- Submit Banking Information (Invoicing and Banking)

For organizations with Capacity Generation Resources, some tasks are not required because they would have already been completed when the organization was first registered with the IESO.



Step	Instruction	Picture
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7 Task: Submit IESO Market Entry Application Fee (Applicant Representative)

Click **Tasks** on the menu bar at the top of the screen.

Click **Submit IESO Market Entry Application Fee for <your organization>** from the list of available tasks displayed on the subsequent screen.

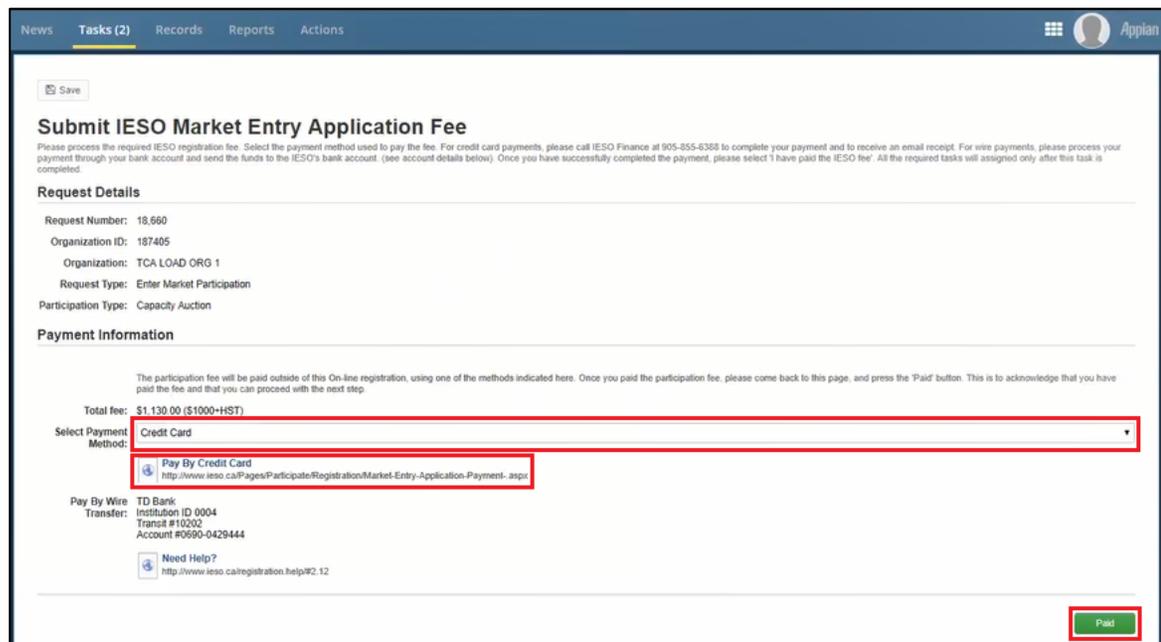
Click **Yes** to confirm that you accept the task.

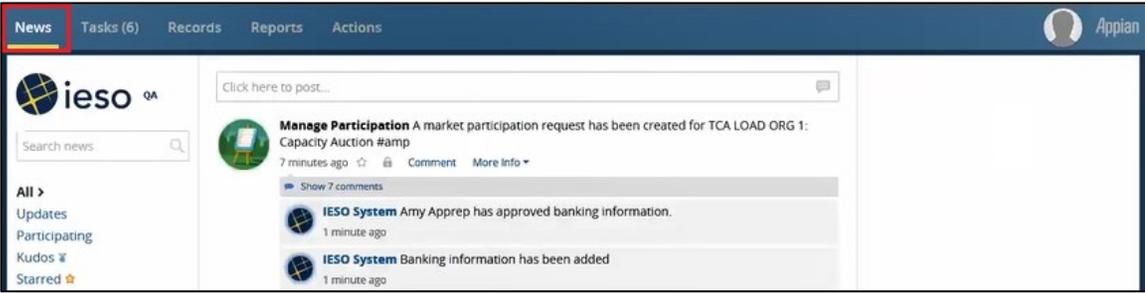
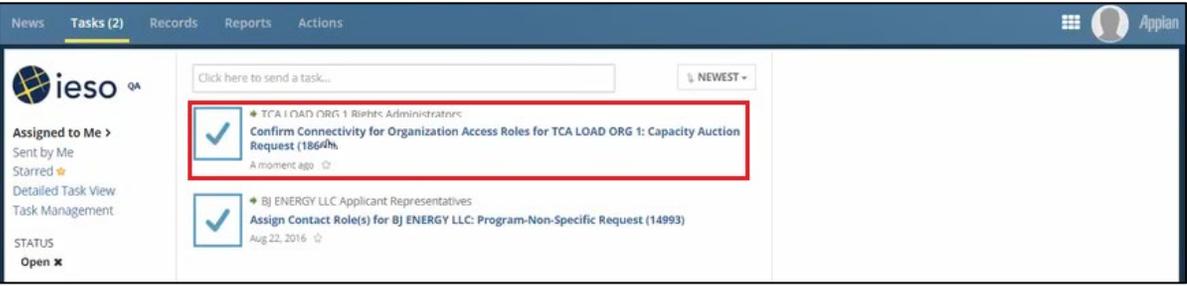


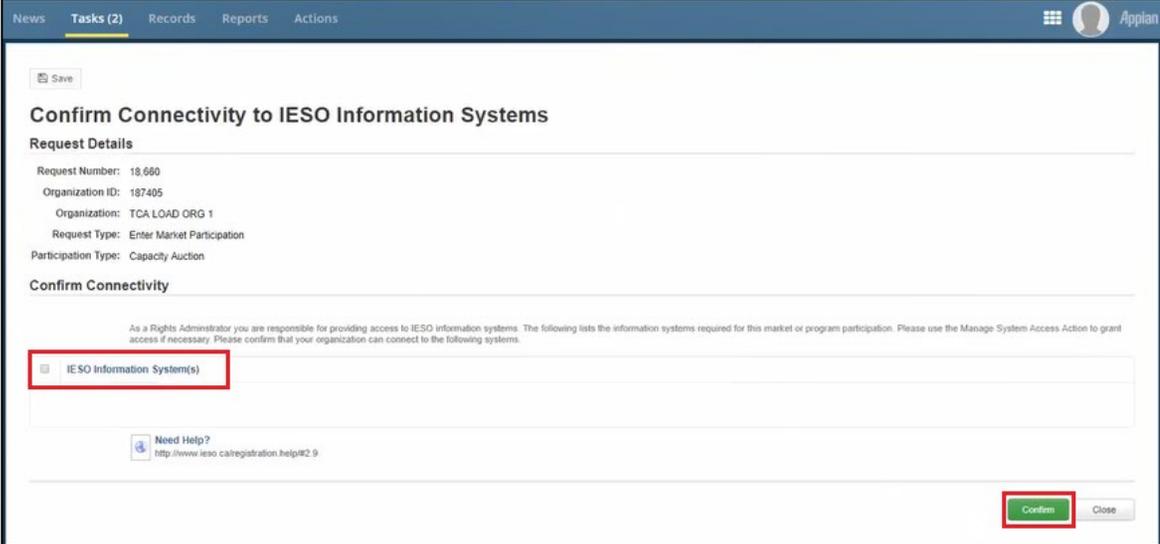
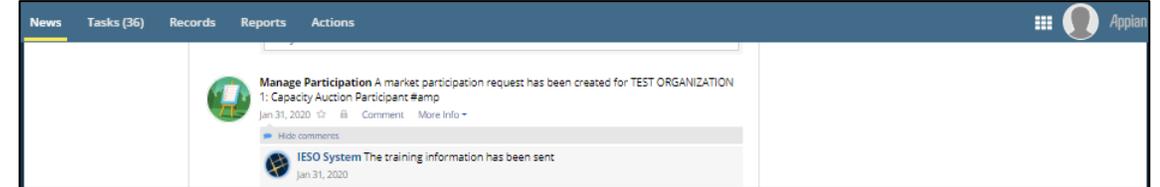
8 The **Submit IESO Market Entry Application Fee** screen is displayed.

Click **Pay by Credit Card** to link to the external website where you can make the payment.

Select the payment method that you used, and click **Paid**.



Step	Instruction	Picture
9	Click News on the menu bar at the top of the screen to view the Payment Received notification.	 <p>The screenshot shows the IESO News feed. The 'News' menu item is highlighted in red. The feed contains a notification titled 'Manage Participation' with the text 'A market participation request has been created for TCA LOAD ORG 1: Capacity Auction #amp' and two system updates from 'IESO System' regarding banking information approval and addition.</p>
10	You will also receive an email with the subject line Training Info for <your organization>: Capacity Auction Participant Request . This email provides you with valuable links to training documents and contact information at the IESO.	N/A
11	<p>Task: Confirm Connectivity for Access Roles</p> <p>Click Tasks on the menu bar at the top of the screen.</p> <p>Click Confirm Connectivity for Organization Access Roles for <your organization>: Capacity Auction Request from the list of available tasks displayed on the subsequent screen.</p>	 <p>The screenshot shows the IESO Tasks page. The 'Tasks (2)' menu item is highlighted in yellow. A task titled 'Confirm Connectivity for Organization Access Roles for TCA LOAD ORG 1: Capacity Auction Request (1864h)' is highlighted with a red box. Another task, 'Assign Contact Role(s) for BJ ENERGY LLC: Program-Non-Specific Request (14993)', is also visible.</p>

Step	Instruction	Picture
	Click Yes to confirm that you accept the task.	
12	After you confirm that you are able to access your participant reports (at the this link) by logging in with your credentials, select the appropriate check box via the Confirm Connectivity to IESO Information Systems screen, and click Confirm .	
13	Click News on the menu bar at the top of the screen to view the confirmation notification that the task has been completed.	

Step Instruction Picture

14 Task: Assign Contact Roles

Click **Tasks** on the menu bar at the top of the screen.

Click **Assign Contact Roles for <your organization>** from the list of available tasks displayed on the subsequent screen.

Click **Yes** to confirm that you accept the task.



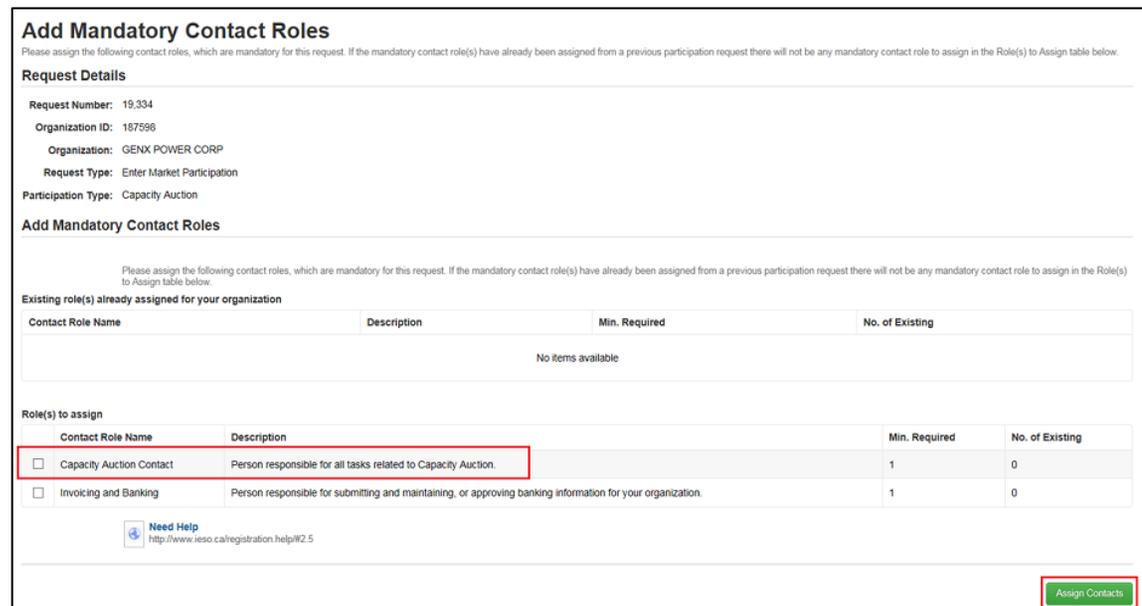
15 The **Add Mandatory Contact Roles** screen is displayed.

Select the check box corresponding to Capacity Auction Contact (listed under Contact Role Name), and click **Assign Contacts**.

Note: During CAP authorization, the following contacts are mandatory and are applicable to all organizations, regardless of resource type:

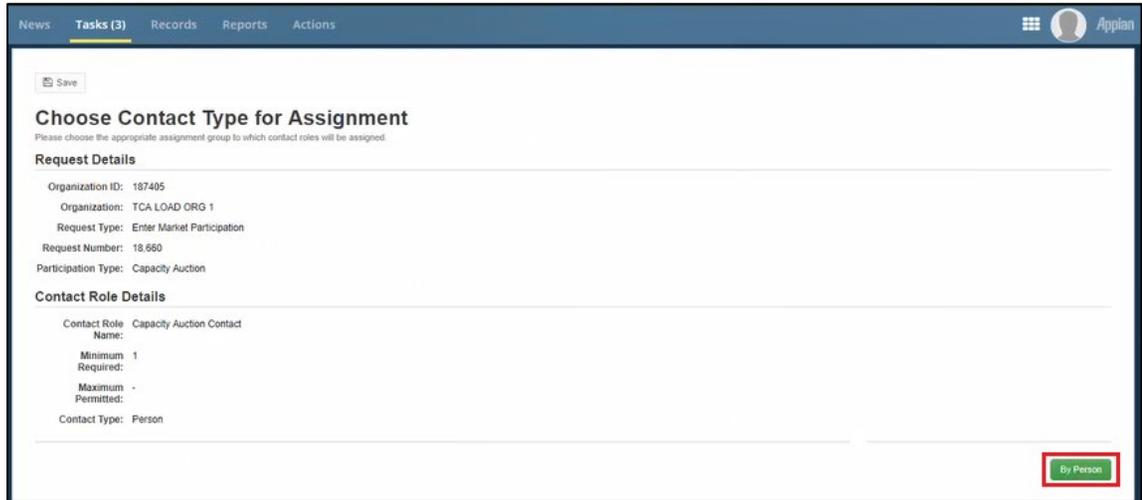
- 1) Capacity Auction Contact
- 2) Invoicing and Banking

At a minimum, one contact is required per Contact Role.



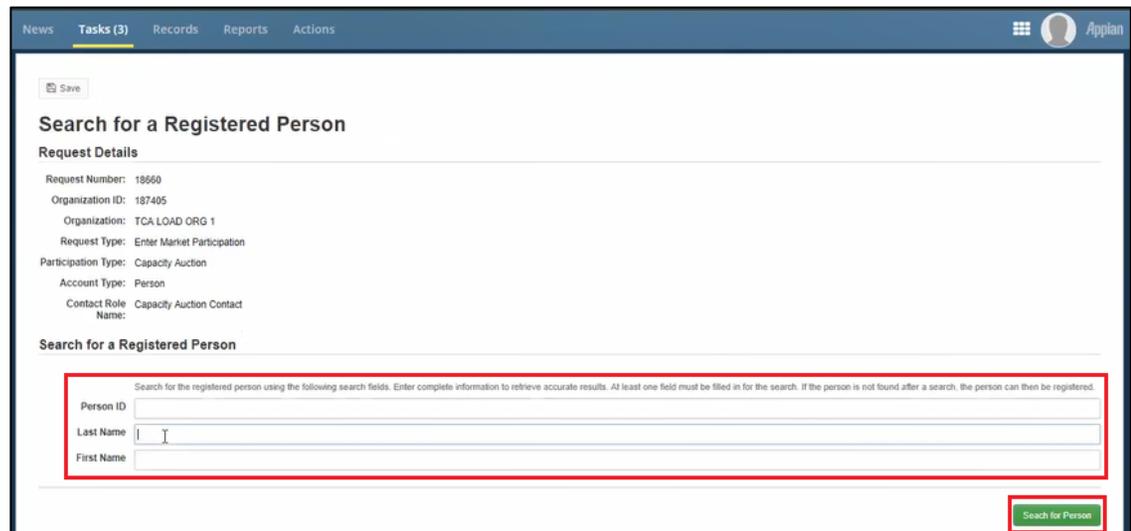
Step Instruction Picture

16 The **Choose Contact Type for Assignment** screen is displayed for your review – click **By Person** to proceed.



17 The **Search for a Registered Person** screen is displayed.

To search for a registered person, enter the name of the registered person in the search fields, and click **Search for Person**.



Step Instruction

Picture

18 If a person is registered in the IESO database, that name appears in the **Search Results** via the **Select Registered Person** screen – select the corresponding check box, and click **Next**.

If a person is not already in the IESO database, you must register that individual by clicking **Register New Person**.

News **Tasks (3)** Records Reports Actions

Save

Select Registered Person

Request Details

Request Number: 18660
Organization ID: 187405
Organization: TCA LOAD ORG 1
Request Type: Enter Market Participation
Participation Type: Capacity Auction
Account Type: Person
Contact Role: Capacity Auction Contact
Name:

Search Results

Person ID	Last Name	First Name	Preferred Name	Middle Name
No items available				

If you do not see the correct person, please refine your search in the fields below.

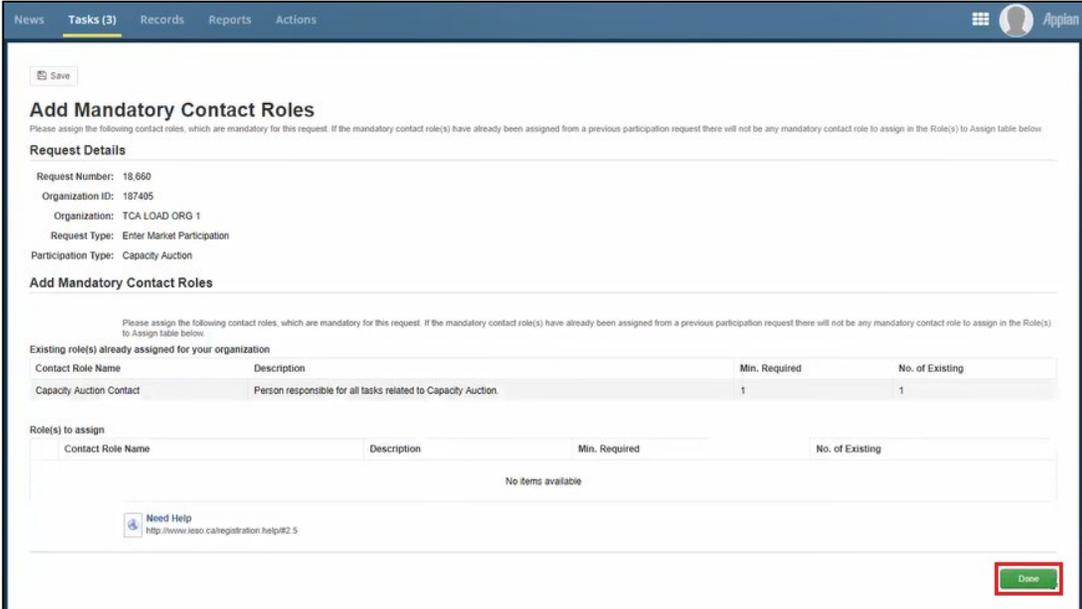
Person ID
Last Name
First Name

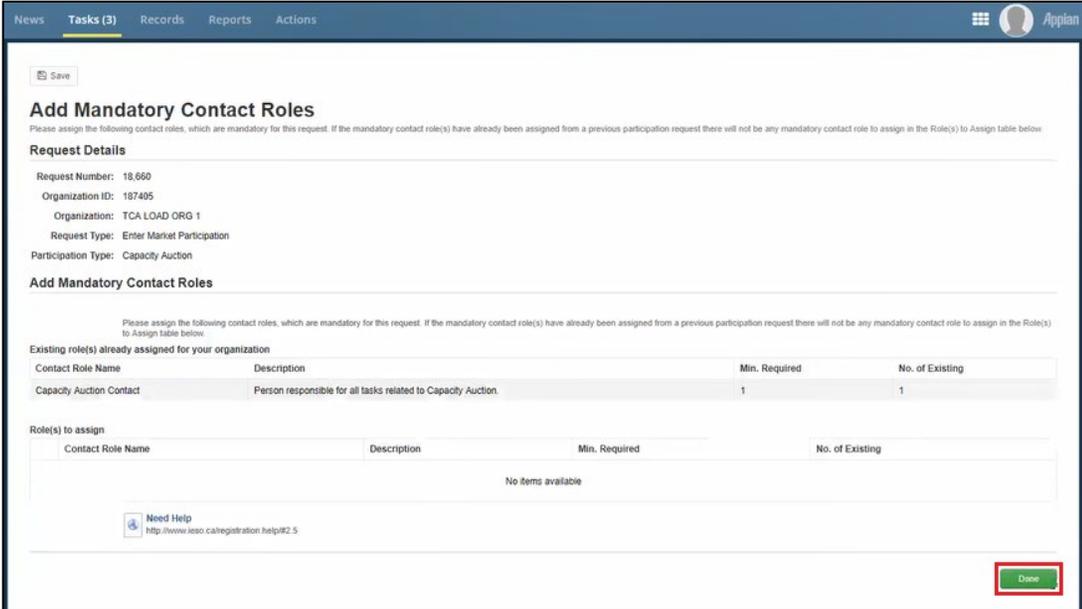
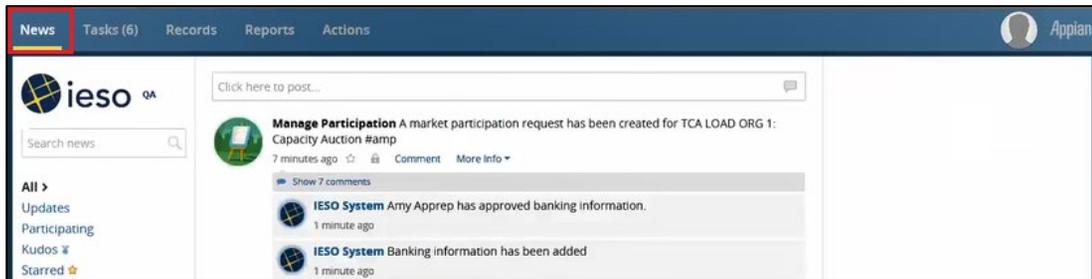
Next Refine Search Register New Person

19 Repeat Steps 18 – 21 after selecting the check box corresponding to **Invoicing and Banking** listed under **Contact Role Name**.

Role(s) to assign				
	Contact Role Name	Description	Min. Required	No. of Existing
<input checked="" type="checkbox"/>	Invoicing and Banking	Person responsible for submitting and maintaining, or approving banking information for your organization.	1	0

Step	Instruction	Picture
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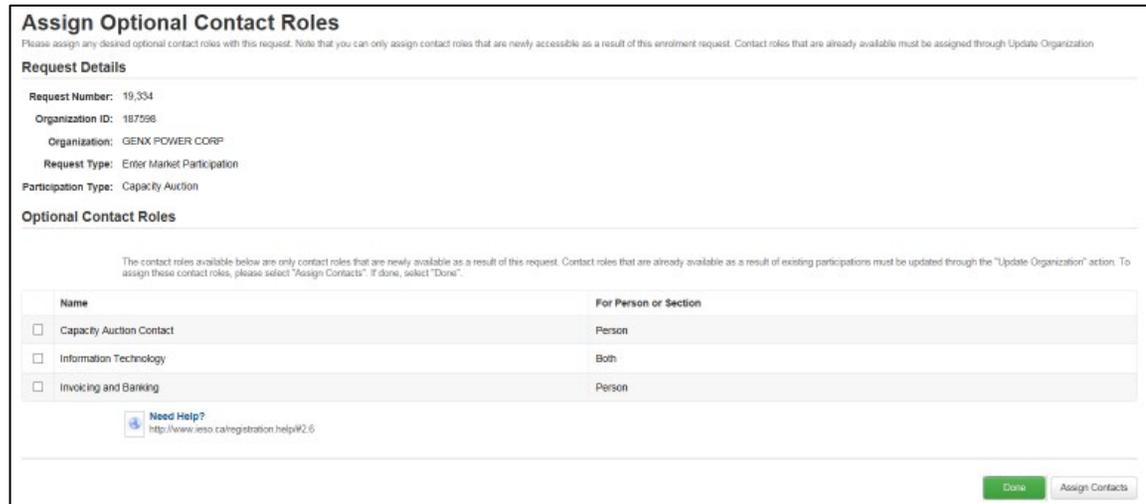
20	<p>After all mandatory contact roles have been added, click Done.</p> <p>The registered person will receive the IESO contact role update notification email.</p>	
21	<p>Click News on the menu bar at the top of the screen to view the notification confirming that this step has been completed.</p> <p>You will also receive an email confirmation notification with the subject line IESO Notice – Contact Update. This email confirms that the roles have been assigned.</p>	

Step Instruction Picture

22 Assign optional contact roles (if applicable) in a similar manner to mandatory contact roles.

Note: You can also add more than one person per contact role at this point.

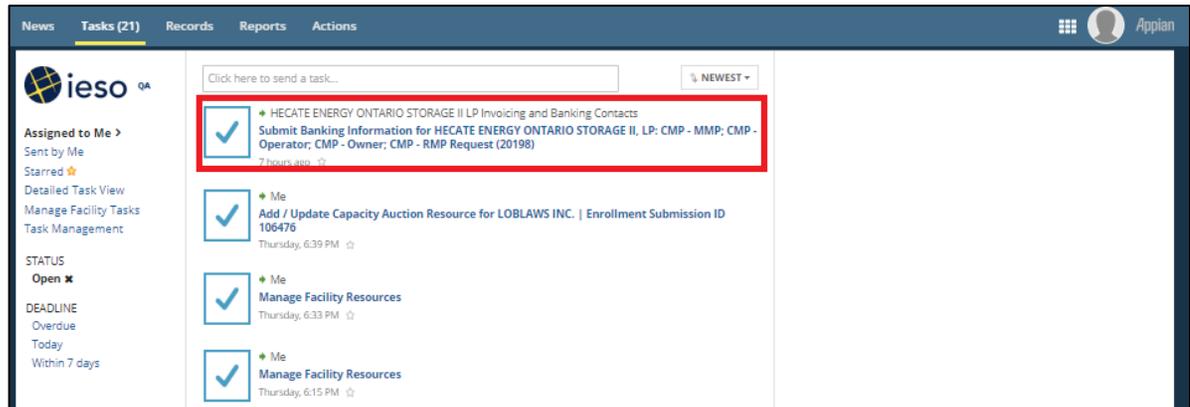


23 Task: Submit Banking Information (Invoice and Banking contact role)

Click **Tasks** on the menu bar at the top of the screen.

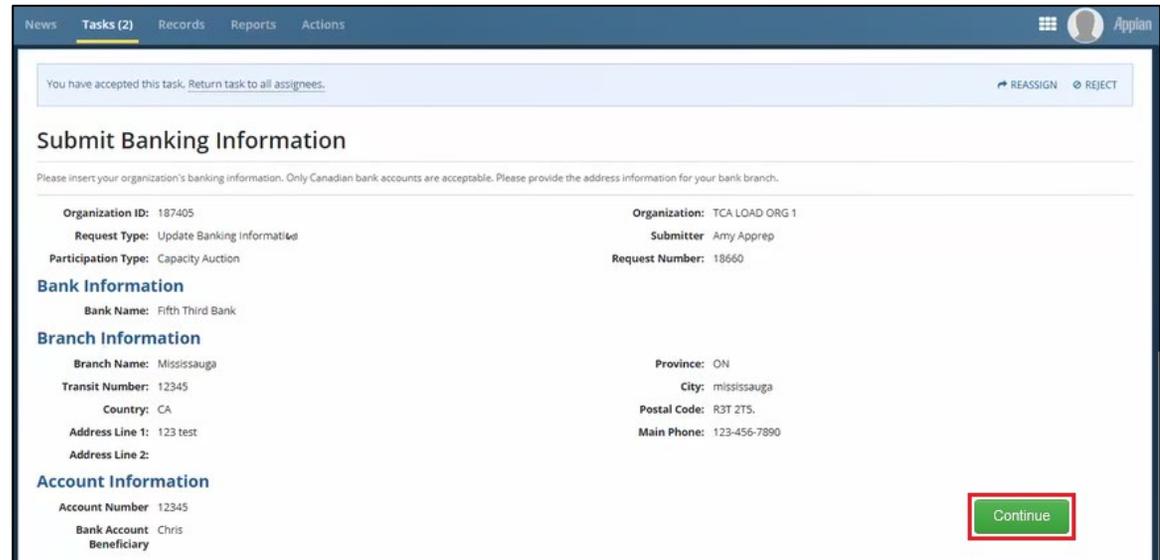
Click **Submit Banking Information for <your organization>**: **Capacity Auction Request** from the list of available tasks displayed on the subsequent screen.

Click **Yes** to confirm that you accept the task.



Step Instruction Picture

24 The **Submit Banking Information** screen is displayed.
All fields marked with a red star are mandatory.
Complete the form and click **Continue**.



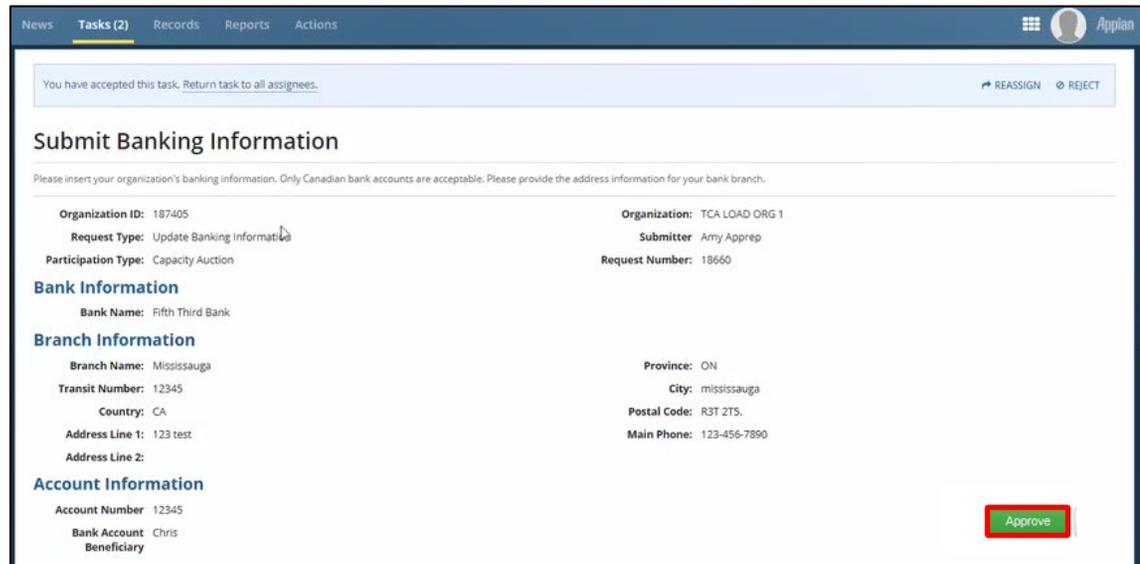
25 Click **News** on the menu bar at the top of the screen to view the confirmation notification that the form has been completed.



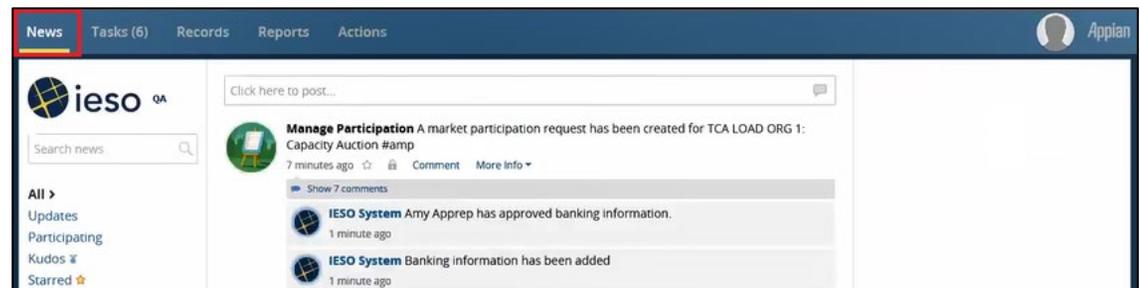
Step	Instruction	Picture
26	<p>A second user (Primary Contact, Authorized Representative or other individual in the Invoicing and Banking contact role) must log in to the Online IESO web-based registration system in order to approve the banking information.</p> <p>Note: If the original user who submitted the task tries to also complete this task, an error message is displayed.</p>	<div data-bbox="768 297 1948 350" style="border: 1px solid red; padding: 5px; margin-bottom: 5px;"> <p>You are unable to approve the banking information in this task since the approver cannot be the same person who submitted the information.</p> </div> <div data-bbox="768 378 1948 431" style="border: 1px solid red; padding: 5px;"> <p>If you have accepted the task, please click the button below to return the task to the assignee group and request for another user at your organization to approve the banking information.</p> </div>
27	<p>Task: Approve Banking Information</p> <p>The second user (separate sign-in required) must accept the task by clicking Tasks on the menu bar at the top of the screen, and then clicking Approve Banking Information for <your organization>: Capacity Auction Request from the list of available tasks displayed on the subsequent screen.</p>	 <p>The screenshot shows the IESO web interface. At the top, there is a navigation bar with 'News', 'Tasks (2)', 'Records', 'Reports', and 'Actions'. Below this, there is a search bar and a 'NEWEST' dropdown. The main content area displays a list of tasks. The first task is 'Approve Banking Information for TCA LOAD ORG 1: Capacity Auction Request (18660)', which is highlighted with a red box. The second task is 'Assign Contact Role(s) for BJ ENERGY LLC: Program-Non-Specific Request (14993)'. On the left side, there is a sidebar with 'Assigned to Me', 'Sent by Me', 'Starred', 'Detailed Task View', 'Task Management', 'STATUS', 'DEADLINE', and 'Open x'.</p>
28	<p>Click Yes to confirm that you accept the task.</p>	N/A

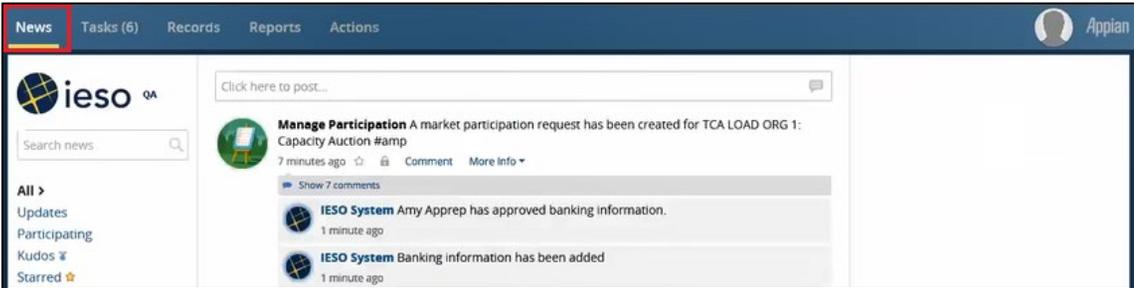
Step	Instruction	Picture
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29	Review the information in the form, confirm or edit as required, and click Approve .	
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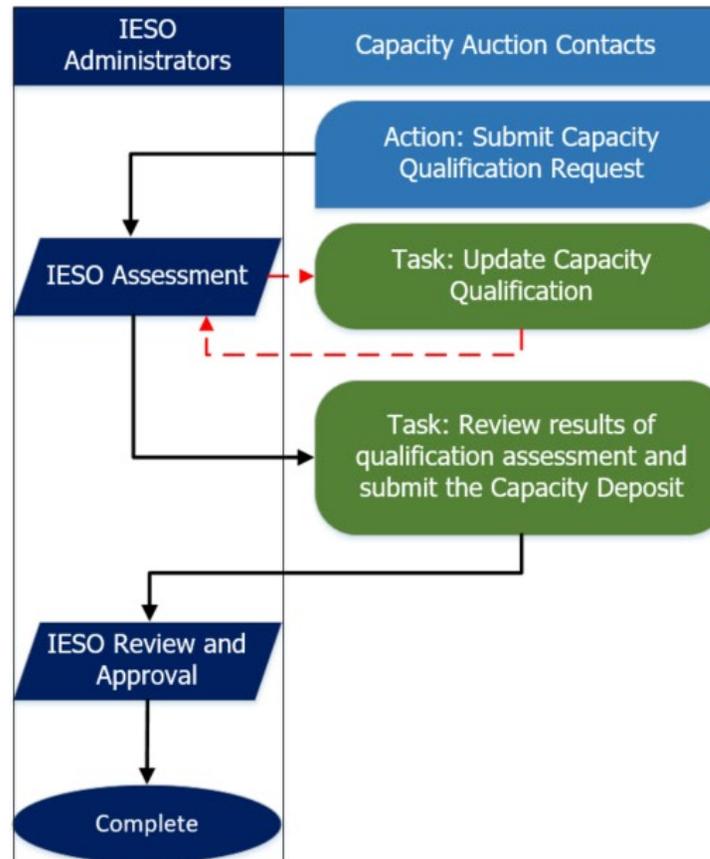
30	The original user can view a confirmation notification that the form has been completed by clicking News on the menu bar at the top of the screen.	
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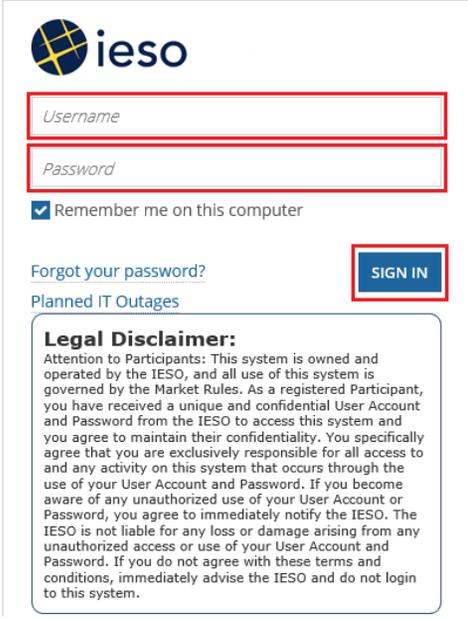


Step	Instruction	Picture
31	<p>After all tasks have been completed, click News on the menu bar at the top of the screen to view a confirmation notification.</p> <p>You will also receive a Registration Approval Notification (RAN) in your email inbox after the IESO has completed the authorization process.</p>	 <p>The screenshot shows the IESO News feed interface. At the top, there is a navigation bar with 'News' highlighted in red, along with 'Tasks (6)', 'Records', 'Reports', and 'Actions'. The user's name 'Appian' is visible in the top right corner. The main content area displays a notification titled 'Manage Participation' with the text 'A market participation request has been created for TCA LOAD ORG 1: Capacity Auction #amp'. Below this, there are two system messages from 'IESO System': 'Amy Apprep has approved banking information.' and 'Banking information has been added'. The left sidebar contains a search bar and a list of filters: 'All >', 'Updates', 'Participating', 'Kudos', and 'Starred'.</p>

2. How to Submit a Capacity Qualification Request

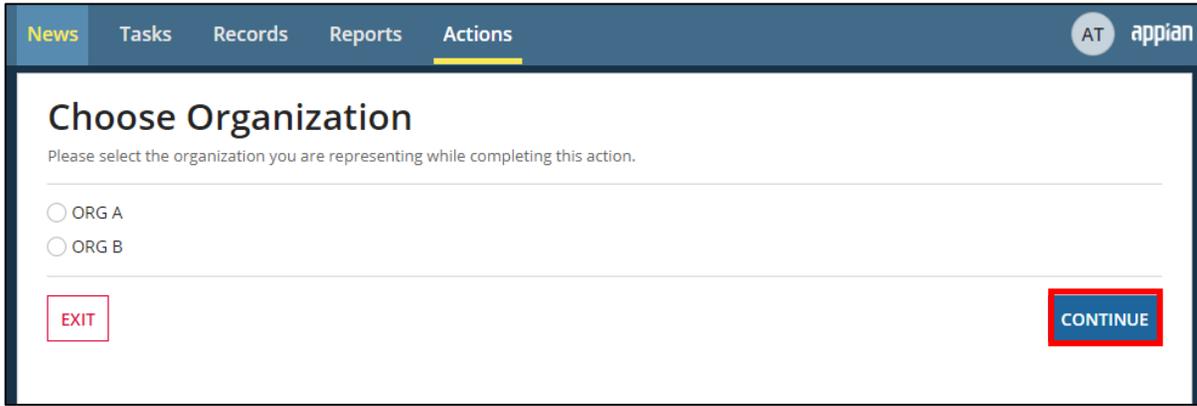
The following flowchart and table provides step-by-step instructions, with accompanying screen captures, describing how to submit a capacity qualification request using the Online IESO web-based registration system. You must receive a Registration Approval Notification (RAN) email authorizing you as a Capacity Auction Participant before you can submit a capacity qualification request using Online IESO. The Capacity Auction Contact is the contact role that can submit a capacity qualification request.



Step	Instruction	Picture
1	<p>Action: Submit Capacity Qualification Request.</p> <p>The Capacity Auction Contact is the contact role that can submit a capacity qualification request.</p> <p>Log in to the Online IESO web-based registration system using this link.</p> <p>Enter your Username and Password, and click Sign In. You must have an active gateway account in order to access Online IESO.</p>	
2	<p>Click Actions on the menu bar at the top of the screen.</p> <p>Select Submit Capacity Qualification Request from the list of available action items displayed on the screen.</p>	

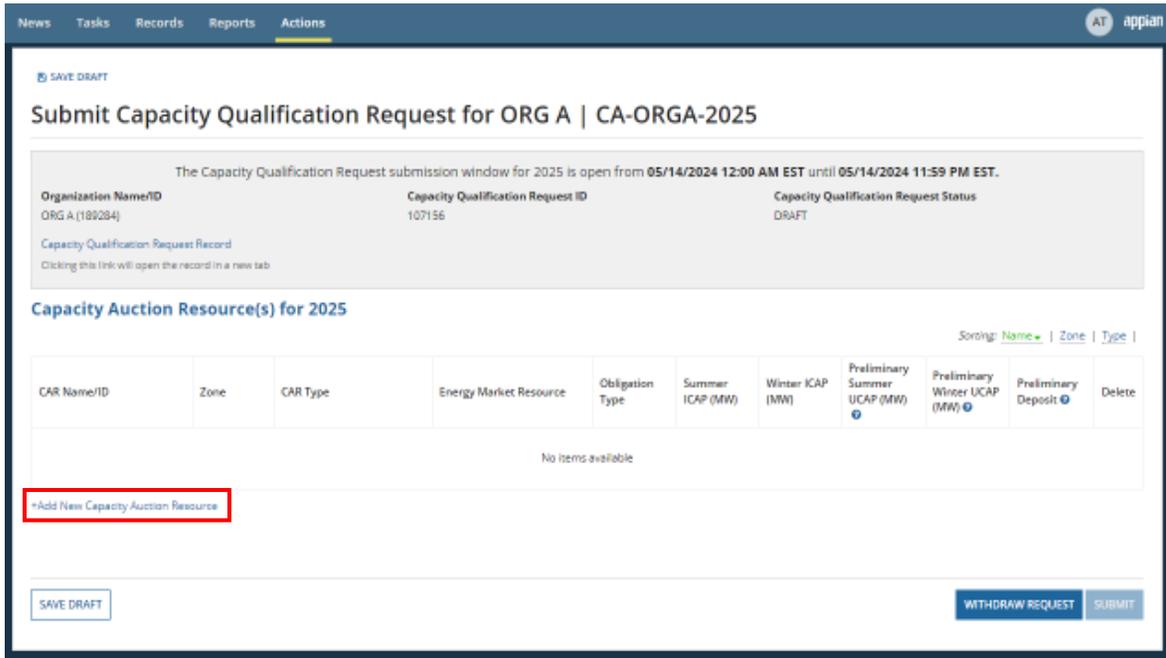
Step	Instruction	Picture
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3 If you are a Capacity Auction Contact for multiple organizations, the **Choose Organization** screen will appear, select the organization for which you intend to complete a capacity qualification request, and click **Continue**.



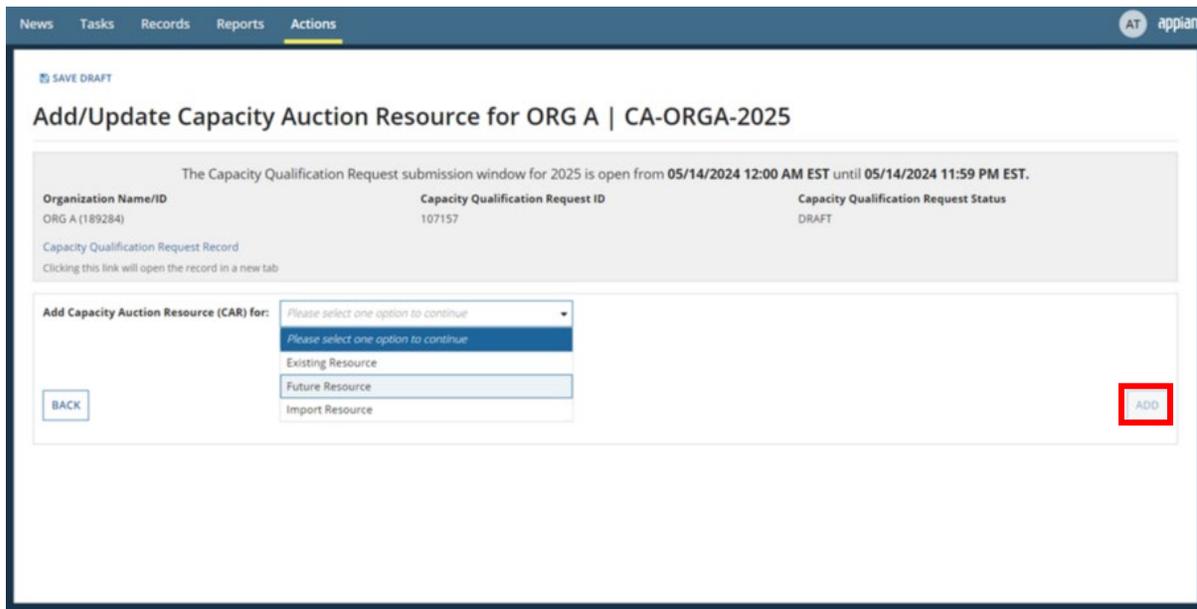
4 You are navigated to the **Submit Capacity Qualification Request** window. As you prepare your capacity qualification request, a summary of your draft submission will be displayed here.

Click **Add New Capacity Auction Resource**. The **Add/Update Capacity Auction Resource** screen appears.



Step	Instruction	Picture
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- 5** On the **Add/Update Capacity Auction Resource** screen, choose one of the available options from the drop-down box and click **Add**.
- A. To participate with a resource that is already registered in the IESO-Administered Market, select **Existing Resource** and proceed to Step **6A**.
 - B. To participate with a demand response resource that is not currently registered in the IESO-Administered Market select **Future Resource** and proceed to Step **6B**.
 - C. To participate with an import resource, select **Import Resource** and proceed to Step **6C**.



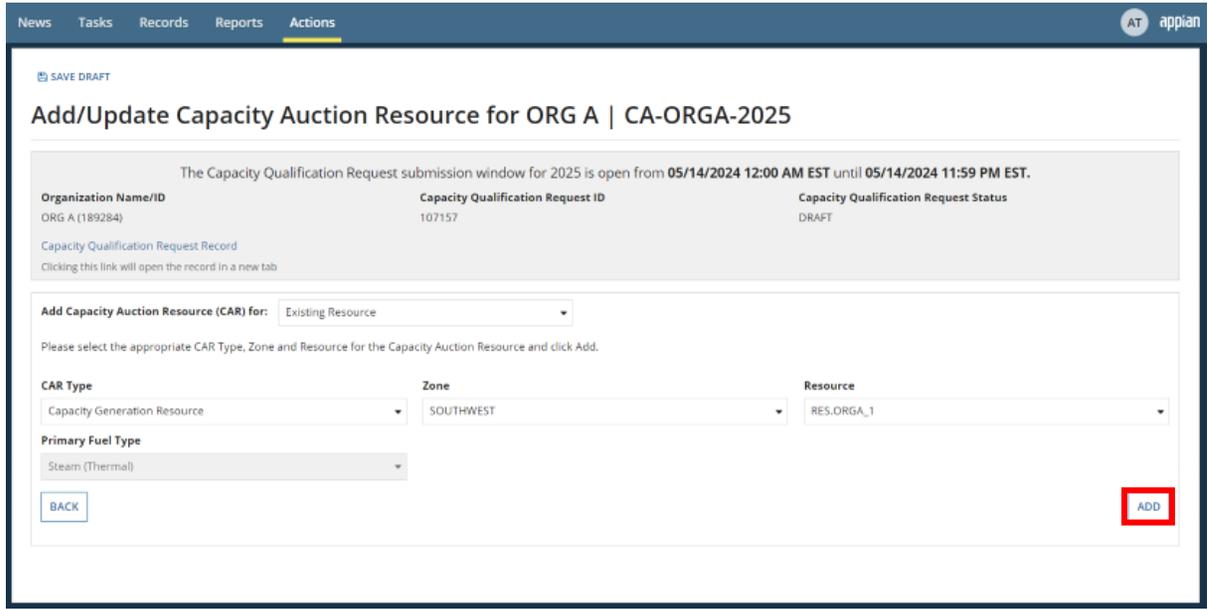
Step	Instruction	Picture
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6A If you selected **Existing Resource** from the drop-down box in step 5, additional drop-down boxes will appear.

Use the drop-down boxes for **CAR Type** and **Zone** to filter your list of available resources.

Based on the resource that is selected, the **Primary Fuel Type** of the chosen resource will be pre-populated.

Once you have selected a **Resource**, click **Add**. Proceed to Step 7.

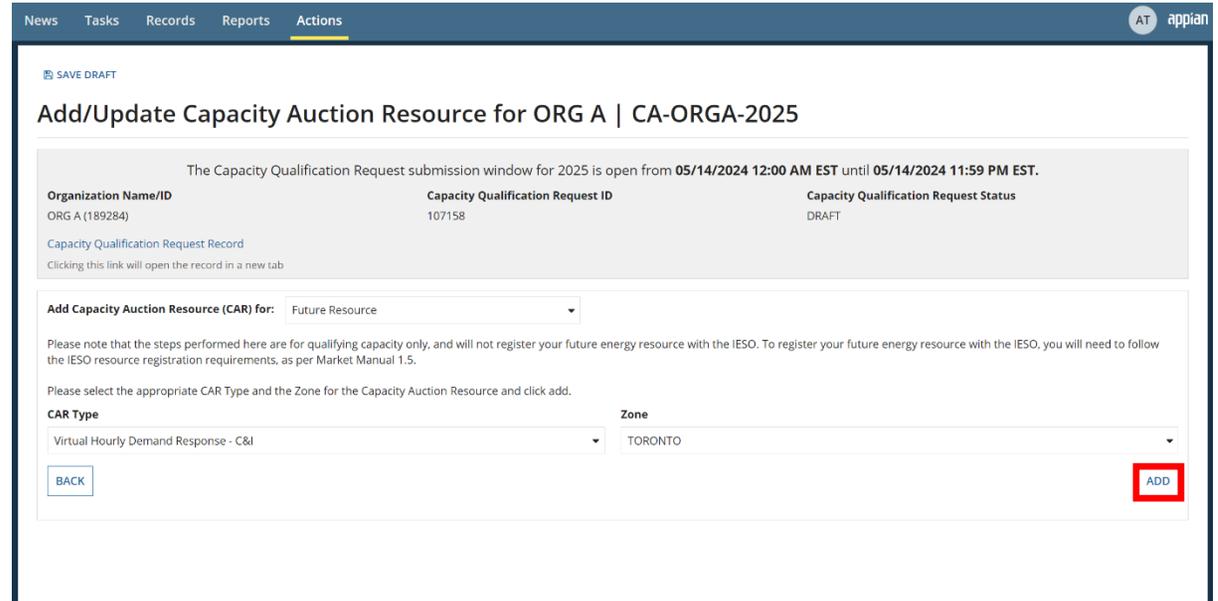


Step	Instruction	Picture
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6B If you selected **Future Resource** from the drop-down box in step 5, additional drop-down boxes will appear.

Use the drop-down boxes to choose a **CAR Type** and **Zone** that would apply to the future resource. Since this resource has not yet completed the market registration process, these selections will need to be consistent with how the future resource will qualify for, offer into and participate in the auction, once registration is completed during the forward period.

Once you have selected the **CAR Type** and **Zone**, click **Add**. Proceed to Step **7**.



Reminder: if you are qualifying a future resource, the registered owner of that resource must be the Capacity Auction Participant.

Step**Instruction****Picture****6C**

If you selected **Import Resource** from the drop-down box in step 5, additional drop-down boxes will appear that will allow you to submit either a System-Backed Import or Generator-Backed Import Resource.

Note: You can only submit a System-Backed Import Resource if your resource is designated as such by the IESO.

Use the drop-down boxes to choose **Capacity Import Resource** as your **CAR Type**, and the **Interface** where capacity import offers will be offered through. The **Resource**, **CAR Sub Type** and **Zone** will pre-populate based on these selections. Click **Add**. Proceed to Step 7.

If you are qualifying a **Generator-Backed Import Resource**, go directly to Step 8.

The screenshot shows the 'Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025' form. At the top, there is a navigation bar with 'News', 'Tasks', 'Records', 'Reports', and 'Actions'. Below the navigation bar, there is a 'SAVE DRAFT' button and the title 'Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025'. The main content area contains a message: 'The Capacity Qualification Request submission window for 2025 is open from 05/14/2024 12:00 AM EST until 05/14/2024 11:59 PM EST.' Below this message, there are three columns of information: 'Organization Name/ID' (ORG A (189284)), 'Capacity Qualification Request ID' (107158), and 'Capacity Qualification Request Status' (DRAFT). There is also a link for 'Capacity Qualification Request Record' with a note: 'Clicking this link will open the record in a new tab'. Below this, there is a dropdown menu for 'Add Capacity Auction Resource (CAR) for:' set to 'Import Resource'. A note says: 'Please select the appropriate CAR Type and Interface for the Capacity Auction Resource and click Add.' Below this, there are four dropdown menus: 'CAR Type' (Capacity Import Resource), 'Interface' (NY.ROSETON), 'Resource' (NY.ROSETON.SOURCE.GBACK), and 'CAR Sub Type' (Generator Backed Import). The 'Zone' dropdown is pre-populated with 'NIAGARA'. At the bottom left is a 'BACK' button and at the bottom right is an 'ADD' button highlighted with a red box.

7A This step applies to **Capacity Generation, Hourly Demand Response** and **Capacity Dispatchable Load** resources.

On this screen, you will enter the name of your capacity auction resource if you selected 'Future Resource' on the preceding screen. If you selected an existing resource, that resource name will be pre-populated as the default CAR Name. For either resource, you must also enter the installed capacity (**ICAP**) in MW for the applicable obligation periods.

Enter a 0 value for any obligation period that your resource will not be participating in.

Note: The maximum ICAP value that can be submitted for summer or winter cannot exceed either the Maximum Generator Capability (if applicable) of that resource (found in the Capacity Auction Resource Details table displayed) and the zonal limits shown in the column(s) to the

The screenshot shows a web application interface for adding or updating a Capacity Auction Resource (CAR) for ORG A in 2025. The page title is "Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025". A notification states that the submission window for 2025 is open from 05/14/2024 12:00 AM EST until 05/14/2024 11:59 PM EST. The form includes the following details:

- Organization Name/ID: ORG A (189284)
- Capacity Qualification Request ID: 107159
- Capacity Qualification Request Status: DRAFT
- Capacity Qualification Request Record: Clicking this link will open the record in a new tab
- Summer Obligation Period: Start Date: 5/1/2025 | End Date: 10/31/2025
- Winter Obligation Period: Start Date: 11/1/2025 | End Date: 4/30/2026
- Capacity Auction Resource (CAR) Details:
 - Zone: SOUTHWEST
 - CAR Name: RES. ORGA_1
 - CAR Type: Capacity Generation Resource
 - Associated Energy Market Resource: RES. ORGA_1 (189292)
 - Obligation Type: PHYSICAL
 - Primary Fuel Type: Steam (Thermal)
 - CAR ID: 200904
 - Maximum Generator Capability (MW): 2
 - Preliminary CAR Deposit (CAD): \$1,162
- CAR Capacity Table:

Obligation Period	Total Zonal Capacity Limit Maximum (MW)	ICAP (MW)	Preliminary Availability De-Rating Factor	Preliminary Performance Adjustment Factor	Preliminary UCAP (MW)
2025 SUMMER	9999	2	0.3	1	0.6
2025 WINTER	9999	0	0.3	1	0

A note at the bottom states: "**Note: Displayed values are preliminary estimates only and are subject to change following the IESO capacity qualification assessment**". Buttons for "BACK" and "UPDATE" are located at the bottom of the form.

left of the **ICAP (MW)** column.

A **Preliminary UCAP** (MW) and **Preliminary CAR Deposit** (CAD) will be calculated based on the ICAP value you input. An availability de-rating factor, and performance adjustment factor (PAF) will apply if applicable.

Note: The **Preliminary UCAP** is rounded up to one decimal place.

Once you have filled out this information, click **Update**.

Proceed to Step **11**.

Step**Instruction****Picture**

7B This step applies if you are qualifying an existing **Capacity Storage Resource**.

On this screen, you will enter:

- the **Full Power Operating Mode (MW)**
- the **Energy Rating (MWh)**

Enter a 0 value for any obligation period that your resource will not be participating in.

Note: The maximum ICAP value that can be submitted for summer or winter cannot exceed either the **Maximum Generator Capability** of that resource (found in the Capacity Auction Resource Details table) and the zonal limits shown in the column(s) to the left of the **Full Power Operating Mode (MW)** column.

An **ICAP (MW)**, **Preliminary UCAP (MW)** and **Preliminary CAR Deposit (CAD)** will be calculated based on the values you input. An availability de-rating factor and performance

The screenshot shows the 'Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025' form. The form includes a header with navigation tabs (News, Tasks, Records, Reports, Actions) and a user profile (AT appian). Below the header, there is a 'SAVE DRAFT' button and a title. The main content area is divided into several sections:

- Organization Information:** Organization Name/ID (ORG A (189284)), Capacity Qualification Request ID (107159), and Capacity Qualification Request Status (DRAFT).
- Obligation Periods:** Summer Obligation Period (Start Date: 5/1/2025, End Date: 10/31/2025) and Winter Obligation Period (Start Date: 11/1/2025, End Date: 4/30/2026).
- Capacity Auction Resource (CAR) Details:**
 - Zone: SOUTHWEST
 - CAR Name: RES.ORG.A_1
 - CAR Type: Capacity Storage Resource
 - Obligation Type: PHYSICAL
 - CAR ID: 200905
 - Associated Energy Market Resource: RES.ORG.A_1 (189292)
 - Maximum Generator Capability (MW): 2
 - Preliminary CAR Deposit (CAD): \$3,872
- CAR Capacity Table:**

Obligation Period	Total Zonal Capacity Limit Maximum (MW)	Full Power Operating Mode (MW)	Energy Rating (MWh)	ICAP (MW)	Preliminary Availability De-Rating Factor	Preliminary Performance Adjustment Factor	Preliminary UCAP (MW)
2025 SUMMER	9999	2	1000	2	1	1	2
2025 WINTER	9999	0	1000	0	1	1	0

At the bottom of the form, there is a note: "**Note: Displayed values are preliminary estimates only and are subject to change following the IESO capacity qualification assessment**". There are also 'BACK' and 'UPDATE' buttons.

Step	Instruction	Picture
	<p data-bbox="296 261 659 331">adjustment factor (PAF) will apply if applicable.</p> <p data-bbox="296 358 716 493">Note: The ICAP is truncated to one decimal place. The Preliminary UCAP is rounded up to one decimal place.</p> <p data-bbox="296 521 674 591">Once you have filled out this information, click Update.</p> <p data-bbox="296 618 562 646">Proceed to Step 11.</p>	

Step**Instruction****Picture****7C**

This step applies if you are qualifying a **System-Backed Import Resource**.

Enter the **ICAP** (MW) for the resource. Enter a 0 value for any obligation period that your resource will not be participating in.

Note: The maximum value that can be input as ICAP for summer or winter cannot exceed either the **Total Zonal Capacity Limit Maximum**, **Global Import Limit** or **Interface Limit** shown in the column(s) to the left of the **ICAP (MW)** column.

A **Preliminary UCAP** (MW) and **Preliminary CAR Deposit** (CAD) will be calculated based on the ICAP you input. A performance adjustment factor (PAF) will apply, if applicable.

Note: The **Preliminary UCAP** is rounded up to one decimal place.

Once you have filled out this information, click **Update**.

The screenshot shows the 'Add/Update Capacity Auction Resource for ORG B | CA-ORGB-2025' page. At the top, there's a navigation bar with 'News', 'Tasks', 'Records', 'Reports', and 'Actions'. Below that, a 'SAVE DRAFT' button is visible. The main heading is 'Add/Update Capacity Auction Resource for ORG B | CA-ORGB-2025'. A message states: 'The Capacity Qualification Request submission window for 2025 is open from 05/14/2024 12:00 AM EST until 05/14/2024 11:59 PM EST.' Below this, there are three columns of information: 'Organization Name/ID' (ORG B (189286)), 'Capacity Qualification Request ID' (107160), and 'Capacity Qualification Request Status' (DRAFT). A link for 'Capacity Qualification Request Record' is provided. The form is divided into 'Summer Obligation Period' (Start Date: 5/1/2025, End Date: 10/31/2025) and 'Winter Obligation Period' (Start Date: 11/1/2025, End Date: 4/30/2026). The 'Capacity Auction Resource (CAR) Details' section includes fields for 'Zone' (NORTHWEST), 'CAR Name *' (MB.WHITESHELL.SOURCE.SBACK.01), 'CAR Type' (Capacity Import Resource), 'CAR Sub Type' (System Backed Import), and 'Obligation Type' (PHYSICAL). A 'Preliminary CAR Deposit (CAD)' of \$77,438 is shown. The 'CAR Capacity' table is as follows:

Obligation Period	Total Zonal Capacity Limit Maximum (MW)	Global Import Limit (MW)	Interface Limit (MW)	ICAP (MW)	Preliminary Performance Adjustment Factor	Preliminary UCAP (MW)
2025 SUMMER	50	500	50	20	1	20
2025 WINTER	150	500	50	20	1	20

At the bottom, there's a note: '**Note: Displayed values are preliminary estimates only and are subject to change following the IESO capacity qualification assessment**'. There are 'BACK' and 'UPDATE' buttons.

Step**Instruction****Picture**

Proceed to Step **11**.

8A Step 8 applies if you are qualifying a **Generator-Backed Import Resource**.

If you added a Generator-Backed Import Resource in step 6, you will be directed to this screen where you will need to add one or more generation or storage facilities that will contribute to the CAR.

Note: The maximum value that can be input as ICAP for summer or winter cannot exceed either the **Total Zonal Capacity Limit Maximum**, **Global Import Limit** or **Interface Limit** shown in the column(s) to the left of the **ICAP (MW)** column under the CAR Capacity table.

Click **Add New Facility to Capacity Auction Resource**. Proceed to Step **8B**

The screenshot displays the 'Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025' page. At the top, there are navigation tabs: News, Tasks, Records, Reports, and Actions. A 'SAVE DRAFT' button is visible in the top left. The main title is 'Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025'. Below the title, a message states: 'The Capacity Qualification Request submission window for 2025 is open from 05/14/2024 12:00 AM EST until 05/14/2024 11:59 PM EST.' The page is divided into several sections: 'Organization Name/ID' (ORG A (189284)), 'Capacity Qualification Request ID' (107161), and 'Capacity Qualification Request Status' (DRAFT). There are also links for 'Capacity Qualification Request Record' and 'Clicking this link will open the record in a new tab'. The 'Obligation Period' section shows 'Summer Obligation Period' (Start Date: 5/1/2025, End Date: 10/31/2025) and 'Winter Obligation Period' (Start Date: 11/1/2025, End Date: 4/30/2026). The 'Capacity Auction Resource (CAR) Details' section includes fields for 'Zone' (NIAGARA), 'CAR Name *' (NY.ROSETON.SOURCE.GBACK), 'Boundary Entity Resource' (NY.ROSETON.SOURCE.GBACK (189051)), 'CAR Sub Type' (Generator Backed Import), 'Obligation Type' (PHYSICAL), and 'CAR ID' (200907). A 'Preliminary CAR Deposit (CAD)' of \$0 is shown. The 'CAR Capacity' table has columns for 'Obligation Period', 'Total Zonal Capacity Limit Maximum (MW)', 'Global Import Limit (MW)', 'Interface Limit (MW)', 'ICAP (MW)', 'Total Facility UCAP (MW)', 'Preliminary Performance Adjustment Factor', and 'Preliminary UCAP (MW)'. The table shows values for 2025 SUMMER and 2025 WINTER. Below the table, a note states: '**Note: Displayed values are preliminary estimates only and are subject to change following the IESO capacity qualification assessment**'. The 'CAR Facility(ies)' table has columns for 'Facility ID', 'Facility Name', 'Facility Type', 'Summer ICAP (MW)', 'Winter ICAP (MW)', 'Summer Facility UCAP (MW)', 'Winter Facility UCAP (MW)', and 'Delete'. The table is currently empty, showing 'No items available'. At the bottom left, a red box highlights the '+ Add New Facility to Capacity Auction Resource' button. A 'BACK' button is also present at the bottom left.

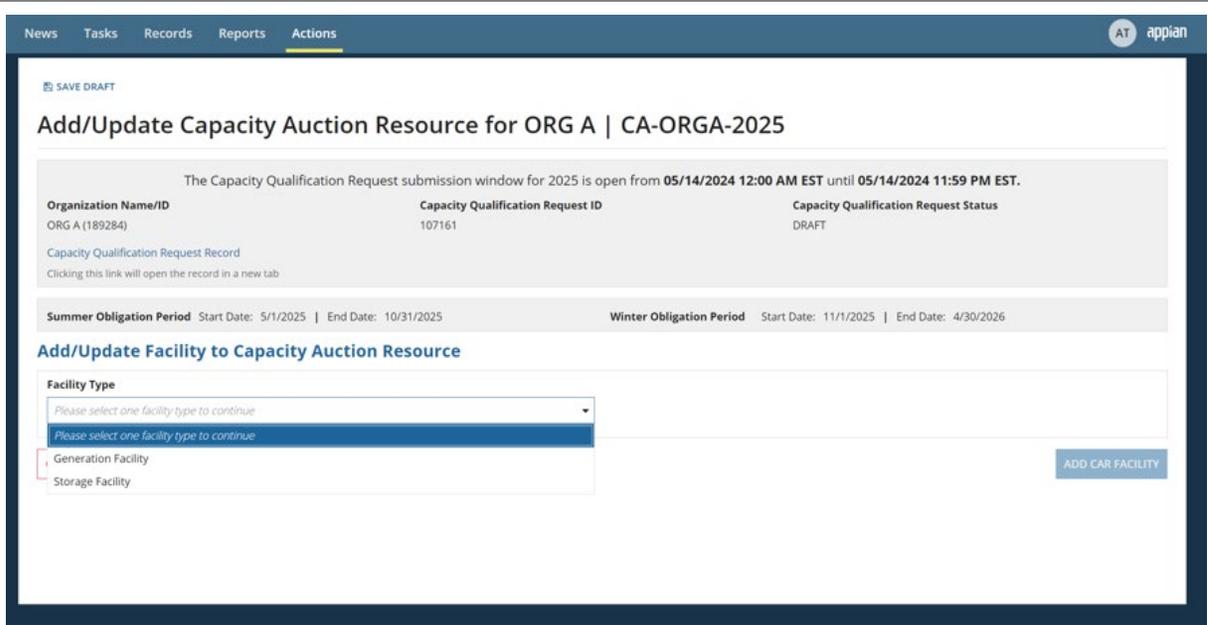
Step	Instruction	Picture
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8B Use the drop-down box to choose a **Facility Type**:

A. If you select **Generation Facility**, go to Step **9A**.

B. If you select **Storage Facility**, go to Step **9B**.

Upon selecting a **Facility Type**, the screen will expand.



Step**Instruction****Picture****9A**

This step only applies to **Generation Facilities** included under a Generator-Backed Import Resource.

On the screen, you will enter:

- Facility ID
- Facility Name
- Facility Fuel Type
- Elapsed Time to Dispatch
- Minimum Loading Point
- Facility ICAP (MW)
- External System Accredited UCAP (MW)

Enter a 0 value for any obligation period that your resource will not be participating in.

A **Preliminary Facility UCAP** (MW) will be equal to the External System Accredited UCAP value you input.

Note: The **Preliminary UCAP** is rounded up to one decimal place.

The screenshot shows a web application interface for adding or updating a capacity auction resource. The page title is "Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025". At the top, there are navigation tabs: News, Tasks, Records, Reports, and Actions. A "SAVE DRAFT" button is visible in the top left. Below the title, a message states: "The Capacity Qualification Request submission window for 2025 is open from 05/14/2024 12:00 AM EST until 05/14/2024 11:59 PM EST." Below this, there is a table with three columns: Organization Name/ID (ORG A (185284)), Capacity Qualification Request ID (107161), and Capacity Qualification Request Status (DRAFT). A link "Capacity Qualification Request Record" is provided with the note "Clicking this link will open the record in a new tab". Below this, there are two obligation periods: "Summer Obligation Period" (Start Date: 5/1/2025, End Date: 10/31/2025) and "Winter Obligation Period" (Start Date: 11/1/2025, End Date: 4/30/2026). The main section is titled "Add/Update Facility to Capacity Auction Resource" and contains several input fields: "Facility Type" (a dropdown menu set to "Generation Facility"), "Facility ID", "Facility Name", "Facility Fuel Type" (a dropdown menu set to "Select Facility Fuel Type"), "Elapsed Time To Dispatch (min)", and "Minimum Loading Point". Below these fields is an "Upload Demonstration of Deliverability Document*" section with an "UPLOAD" button and a "Drop file here" area. At the bottom, there is a "Facility Capacity" table with columns: Obligation Period, Facility ICAP (MW), External System Accredited UCAP (MW), Availability De-Rating Factor, and Preliminary Facility UCAP (MW). The table has two rows: "2025 SUMMER" and "2025 WINTER". The "Facility ICAP (MW)" and "External System Accredited UCAP (MW)" cells for both rows are highlighted with a red box. The "Availability De-Rating Factor" and "Preliminary Facility UCAP (MW)" cells for both rows contain "N/A". A "CANCEL" button is at the bottom left, and an "ADD CAR FACILITY" button is at the bottom right.

Step	Instruction	Picture
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You will also be required to upload a **Demonstration of Deliverability Document** for this facility.

Once you have filled out this information, click **Add CAR Facility**.

Proceed to Step **10**.

9B This step only applies to **Storage Facilities** included under a Generator-Backed Import Resource.

On the following screen, you will enter:

- Facility ID
- Facility Name
- Full Power Operating Mode (MW)
- Energy Rating (MWh)

Enter a 0 value for any obligation period that your resource will not be participating in.

A **Facility ICAP (MW)** and **Preliminary Facility UCAP (MW)** will be calculated based on the values you input and

The screenshot shows a web application interface for adding or updating a capacity auction resource. At the top, there are navigation tabs: News, Tasks, Records, Reports, and Actions. The main heading is "Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025". Below this, there is a "SAVE DRAFT" button and a message: "The Capacity Qualification Request submission window for 2025 is open from 05/14/2024 12:00 AM EST until 05/14/2024 11:59 PM EST." The form displays the following information:

- Organization Name/ID: ORG A (185284)
- Capacity Qualification Request ID: 107161
- Capacity Qualification Request Status: DRAFT
- Capacity Qualification Request Record: Clicking this link will open the record in a new tab.
- Summer Obligation Period: Start Date: 5/1/2025 | End Date: 10/31/2025
- Winter Obligation Period: Start Date: 11/1/2025 | End Date: 4/30/2026

The main section is titled "Add/Update Facility to Capacity Auction Resource". It contains a "Facility Type" dropdown menu set to "Storage Facility". Below this are two input fields: "Facility ID" and "Facility Name", both highlighted with a red box. There is an "Upload Demonstration of Deliverability Document*" section with an "UPLOAD" button and a "Drop file here" prompt, also highlighted with a red box. At the bottom, there is a "Facility Capacity" table:

Obligation Period	Full Power Operating Mode (MW)	Energy Rating (MWh)	Facility ICAP (MW)	Availability De-Rating Factor	Preliminary Facility UCAP (MW)
2025 SUMMER				0.1	
2025 WINTER				0.1	

The table rows are highlighted with a red box. At the bottom left of the form is a "CANCEL" button, and at the bottom right is an "ADD CAR FACILITY" button.

Step	Instruction	Picture
	<p>the resource's availability de-rating factor.</p> <p>Note: The Facility ICAP is truncated to one decimal place. The Preliminary UCAP is rounded up to one decimal place.</p> <p>You will also be required to upload a Demonstration of Deliverability Document for this facility.</p> <p>Once you have filled out this information, click Add CAR Facility.</p> <p>Proceed to Step 10.</p>	

Step

Instruction

Picture

10 This step applies if you are qualifying a **Generator-Backed Import Resource**.

Once you have added the generation/storage facilities included under the capacity auction resource, you will be directed back to the Add/Update Capacity Auction Resource screen where the facilities you added will be summarized in the table under **CAR Facility(ies)**.

The **ICAP (MW)** and **Facility UCAP (MW)** for each facility added under the capacity auction resource will be summed to a single **ICAP** and **Total Facility UCAP** value in the table under **CAR Capacity**. A preliminary UCAP will be calculated based on the inputted total ICAP, Total Facility UCAP and the resource’s performance adjustment factor (PAF).

The **Preliminary CAR Deposit (CAD)** will also be displayed.

The Capacity Qualification Request submission window for 2025 is open from 05/14/2024 12:00 AM EST until 05/14/2024 11:59 PM EST.

Organization Name/ID	Capacity Qualification Request ID	Capacity Qualification Request Status
ORG A (189284)	107161	DRAFT

Capacity Qualification Request Record
Clicking this link will open the record in a new tab

Summer Obligation Period Start Date: 5/1/2025 | End Date: 10/31/2025 Winter Obligation Period Start Date: 11/1/2025 | End Date: 4/30/2026

Capacity Auction Resource (CAR) Details

Zone	NIAGARA	CAR Name *	NY.ROSETON.SOURCE.GBACK	Preliminary CAR Deposit (CAD) \$79,374
CAR Type	Capacity Import Resource	Boundary Entity Resource	NY.ROSETON.SOURCE.GBACK (189051)	
CAR Sub Type	Generator Backed Import	Interface	NY.ROSETON	
Obligation Type	PHYSICAL			
CAR ID	200907			

CAR Capacity

Obligation Period	Total Zonal Capacity Limit Maximum (MW)	Global Import Limit (MW)	Interface Limit (MW)	ICAP (MW)	Total Facility UCAP (MW)	Preliminary Performance Adjustment Factor	Preliminary UCAP (MW)
2025 SUMMER	900	500	500	30	20.5	1	20.5
2025 WINTER	750	500	500	30	20.5	1	20.5

Note: Displayed values are preliminary estimates only and are subject to change following the IESO capacity qualification assessment

CAR Facility(ies)

Facility ID	Facility Name	Facility Type	Summer ICAP (MW)	Winter ICAP (MW)	Summer Facility UCAP (MW)	Winter Facility UCAP (MW)	Delete
FACILITY20	FACILITY20	Generation Facility	20	20	19.5	19.5	<input type="button" value="x"/>
FACILITY10	FACILITY10	Storage Facility	10	10	1	1	<input type="button" value="x"/>

+ Add New Facility to Capacity Auction Resource

Step	Instruction	Picture
	<p>Note: The maximum value that can be input as ICAP for summer or winter cannot exceed either the Total Zonal Capacity Limit Maximum, Global Import Limit or Interface Limit shown in the column(s) to the left of the ICAP (MW) column under the CAR Capacity table.</p> <p>Repeat steps 8 to 9 to add additional facilities.</p> <p>Once complete, click Update. Proceed to Step 11.</p>	

Step**Instruction****Picture**

11 You are navigated back to the **Submit Capacity Qualification Request** screen which now displays a summary of the added capacity auction resource information, including the preliminary deposit balance.

You will now be prompted to submit an **Attestation** for any Capacity Generation Resource, Capacity Storage Resource, Generator-Backed Import Resource, or System-backed Import Resource you are qualifying.

Press **Click Here** within the blue box to navigate to the Review Capacity Qualification Attestation page.

If you are not qualifying a resource type that requires an attestation, skip to Step **13**.

The screenshot displays the 'Submit Capacity Qualification Request for ORG A | CA-ORGA-2025' page. At the top, there is a navigation bar with 'News', 'Tasks (2)', 'Records', 'Reports', and 'Actions'. Below this, a 'SAVE DRAFT' button is visible. The main heading is 'Submit Capacity Qualification Request for ORG A | CA-ORGA-2025'. A message states: 'The Capacity Qualification Request submission window for 2025 is open from 05/14/2024 12:00 AM EST until 05/15/2024 11:59 PM EST.' Below this, a summary table shows: Organization Name/ID (ORG A (189284)), Capacity Qualification Request ID (107161), and Capacity Qualification Request Status (DRAFT). A link for 'Capacity Qualification Request Record' is provided. The main section is titled 'Capacity Auction Resource(s) for 2025' and contains a table with columns: CAR Name/ID, Zone, CAR Type, Energy Market Resource, Obligation Type, Summer ICAP (MW), Winter ICAP (MW), Preliminary Summer UCAP (MW), Preliminary Winter UCAP (MW), Preliminary Deposit, and Delete. The table lists two resources: RES.ORG_A_1 (200908) and NY.ROSETON_SOURCE.GBACK (200907), with a 'Total' row. Below the table is a blue box with a red warning icon and text: 'Participants in the Capacity Auction intending to participate with one of generation resource, storage resource, system-backed import resource or generator-backed import resource, are required to confirm an attestation with respect to the eligibility of their resource(s). To confirm and submit the attestation, click here'. A 'click here' link is highlighted with a red box. At the bottom, there are buttons for 'SAVE DRAFT', 'WITHDRAW REQUEST', and 'SUBMIT'.

CAR Name/ID	Zone	CAR Type	Energy Market Resource	Obligation Type	Summer ICAP (MW)	Winter ICAP (MW)	Preliminary Summer UCAP (MW)	Preliminary Winter UCAP (MW)	Preliminary Deposit	Delete
RES.ORG_A_1 (200908)	SOUTHWEST	Capacity Generation Resource	RES.ORG_A_1 (189292)	PHYSICAL	2	0	0.6	0	\$1,162	✖
NY.ROSETON_SOURCE.GBACK (200907)	NIAGARA	Capacity Import Resource	NY.ROSETON_SOURCE.GBACK (189051)	PHYSICAL	30	30	20.5	20.5	\$79,374	✖
Total					32	30	21.1	20.5	\$80,536	

Step**Instruction****Picture**

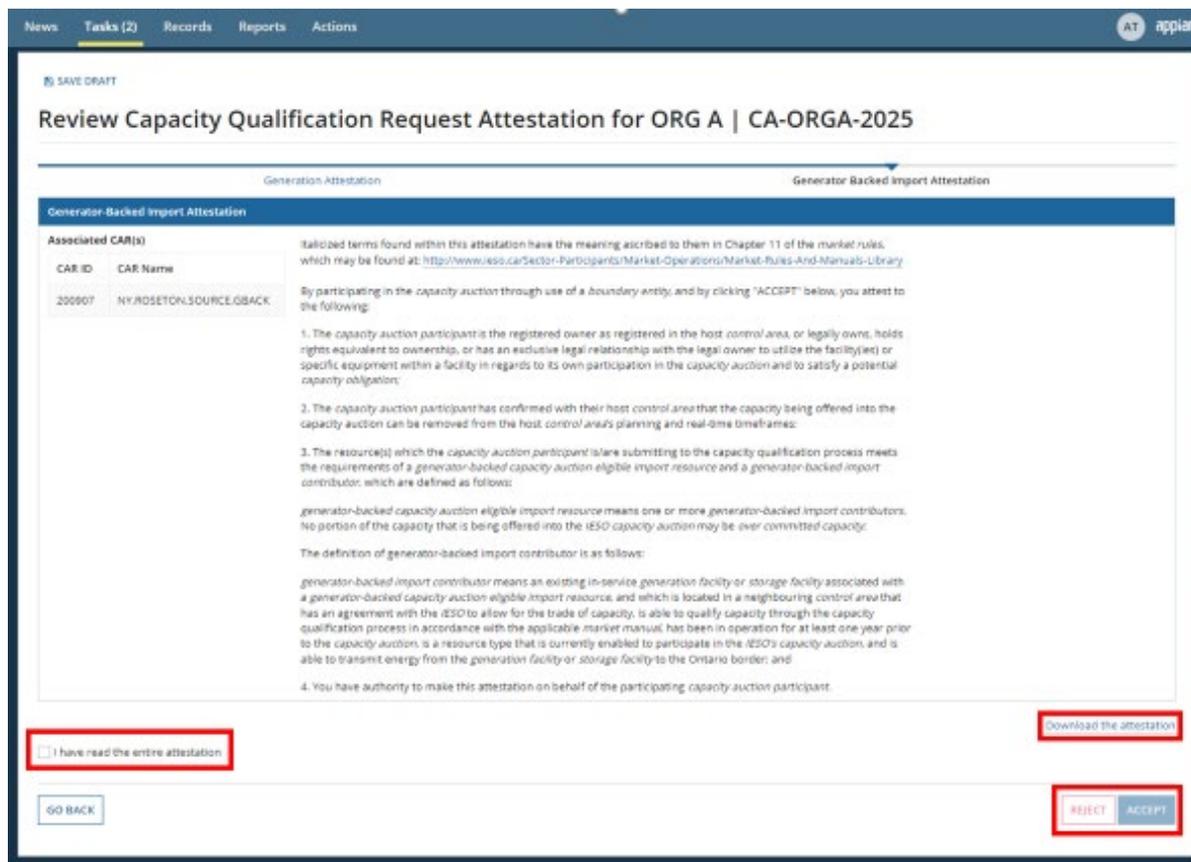
12 The **Review Capacity Qualification Request Attestation** screen is displayed.

You may download a copy of the attestation by clicking the **Download the attestation** link found towards the bottom right of the screen.

After completing your review, select the **I have read the entire attestation** checkbox.

If your capacity qualification request includes multiple capacity auction resource types, you will be required to accept multiple attestations. Click **Next** to view and accept each attestation.

Once all attestations have been read, click either **Accept** or **Reject**. If you reject an attestation, the qualification request will be cancelled.



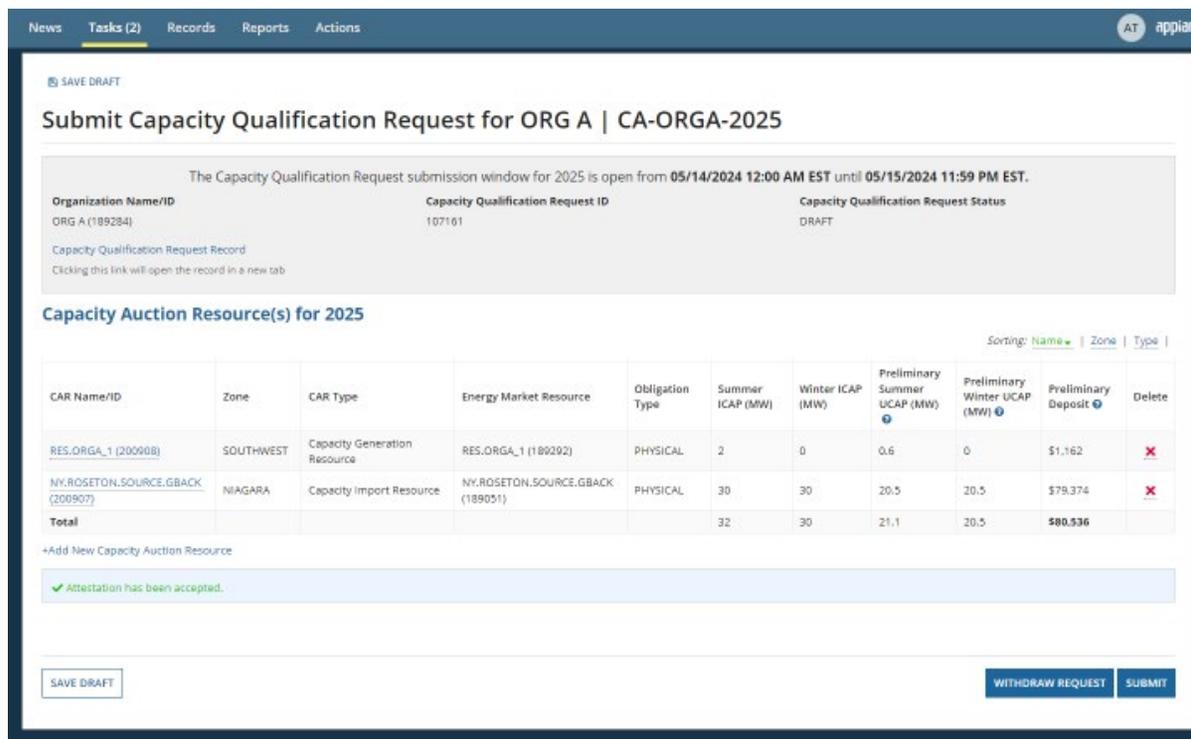
Step**Instruction****Picture**

13 You are returned to the **Submit Capacity Qualification Request** screen.

If applicable, a message will show "Attestation has been accepted."

If you wish to qualify additional resources, click the **Add New Capacity Auction Resource** button again and repeat Steps 4-12. You may also modify the capacity auction resources that you have added by clicking on the **CAR Name** within the table. You may also delete capacity auction resources by clicking on the red X icon under the **Delete** column.

Click **Submit** to proceed with submitting your capacity qualification request. A dialog box will display **Are you sure you want to submit?** Click **Yes**.



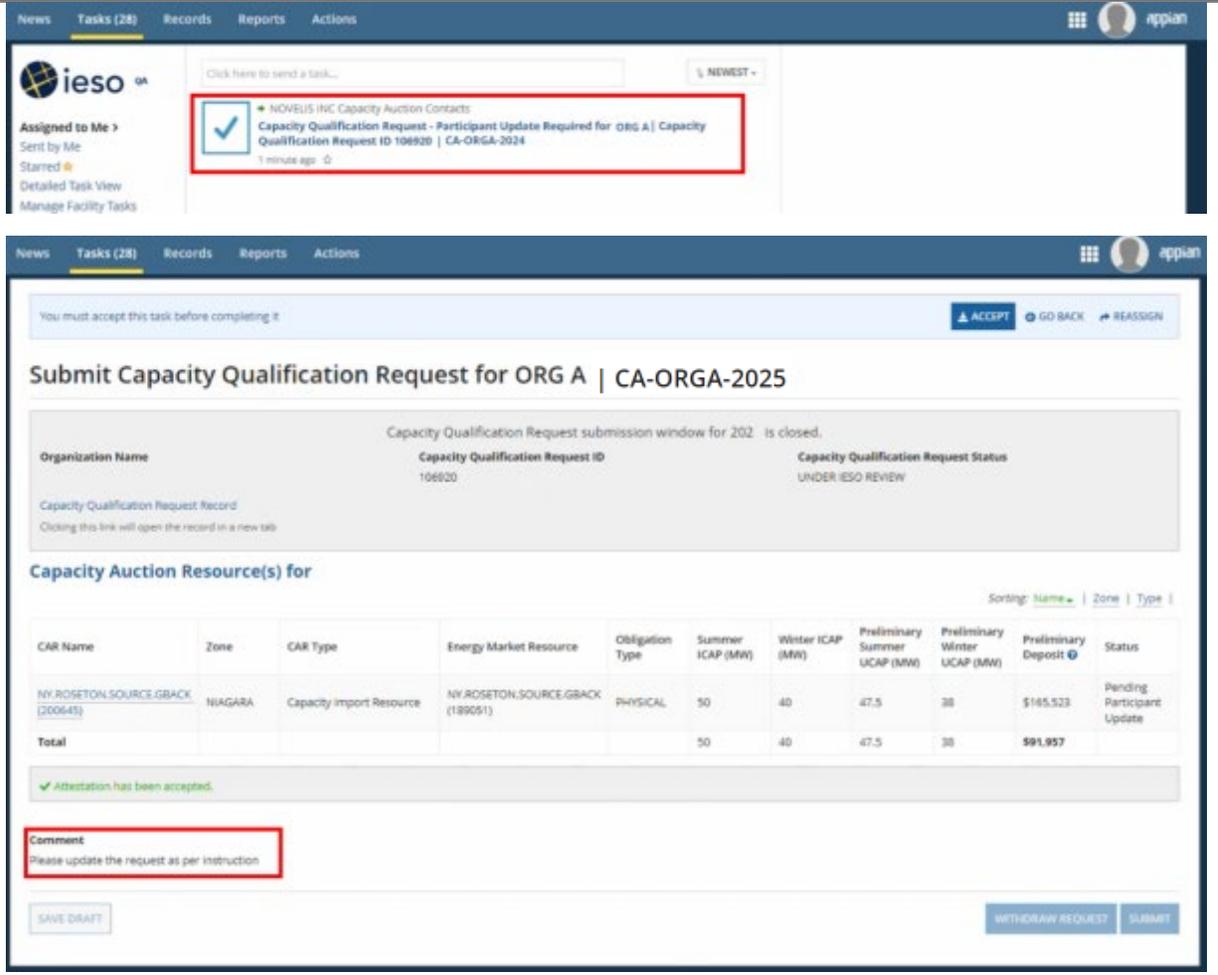
Step	Instruction	Picture
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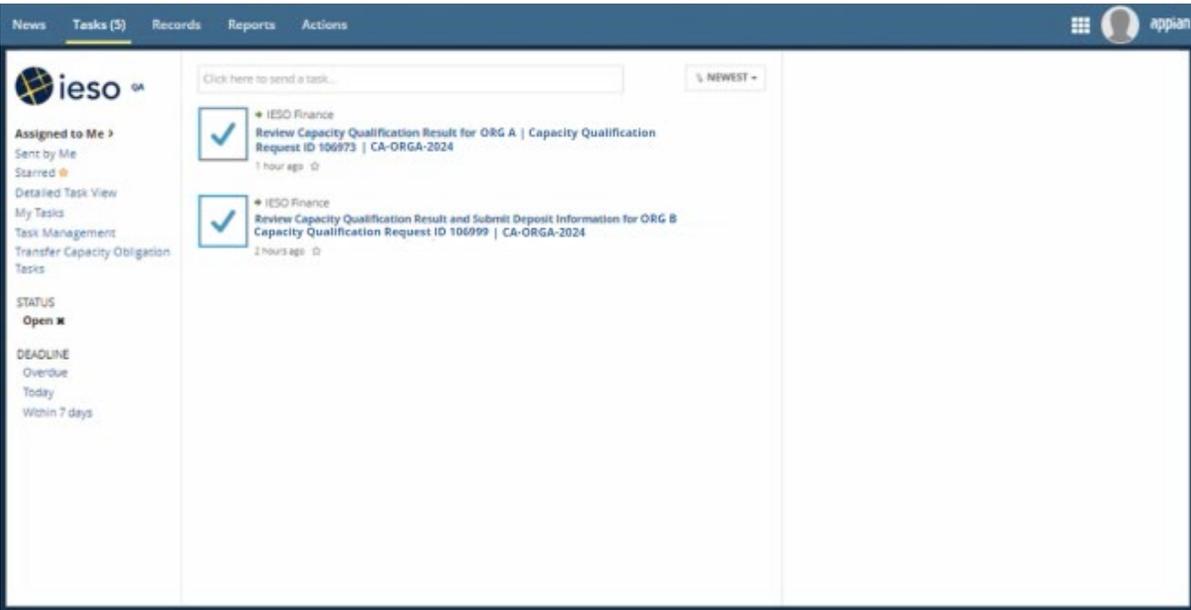
Note: Once the qualification request submission window closes, no further modifications can be made by the participant to the request.

14 After the qualification request submission window has closed, the IESO will assess the request.

During the assessment, if the IESO requires additional information or modifications to a request, you will receive a task titled **Capacity Qualification Request – Participant Update Required**. The participant should enter this task to provide the additional information requested by the IESO or to make the requested modifications to the request.

Refer to the Comment section at the bottom of this task screen for any instructions provided by the IESO.



Step	Instruction	Picture
	<p>Note: No other information outside of what is being requested by the IESO may be modified, and could lead to rejection of the request if the instructions are not followed.</p>	
15	<p>Once the assessment window has closed, you will receive the following two tasks:</p> <ul style="list-style-type: none"> • If you receive a task to Review Capacity Qualification Result and Submit Deposit Information, go to Step 16A. • If you receive a task to Review Capacity Qualification Result, go to Step 16B. 	

16A Task: Review Capacity Qualification Result and Submit Deposit Information

You may review the assessment results here, including the assessed summer UCAP, winter UCAP and assessment status. The deposit required will also be displayed.

You are now required to submit the deposit payment information.

Select the option button corresponding to either **Cash**, **Letter of Credit** or **Cash and Letter of Credit** to indicate the payment method for your deposit. Additional instructions are displayed for the chosen payment method.

If you choose **Letter of Credit**, you must also provide the name of the bank that you wish to use.

If you choose **Cash**, you must use the details provided under the cash deposit instructions to complete the payment. Under the list of cash deposit

News Tasks (39) Records Reports Actions

You have accepted this task. [Return task to all assignees.](#) SAVE DRAFT REASSIGN REJECT

Review Capacity Qualification Result and Submit Deposit for ORG A | CA-ORGA-2025

Capacity Qualification Request Deposit window for : open from 06/11/2023 12:00 AM EST until 06/12/2023 11:59 PM EST.

Organization Name	Capacity Qualification Request ID	Capacity Qualification Request Status
	106943	REQUEST FOR DEPOSIT INFO

Capacity Qualification Request Record
Clicking this link will open the record in a new tab

Auction Deposit Balance is \$487,856.00

Sorting: Name | Zone | Type

CAR Name	Zone	CAR Type	Energy Market Resource	Obligation Type	Summer ICAP (MW)	Winter ICAP (MW)	Summer UCAP (MW)	Winter UCAP (MW)	Deposit	Status
THU6 (200675)	NORTHEAST	Capacity Dispatchable Load Resource	New Energy Resource	PHYSICAL	280	280	140	112	\$487,856	Accepted
Total					280	280	140	112	\$487,856	
Deposit Paid									\$0	
Deposit Balance									\$487,856	

Deposit Information

The following information should be submitted back to the IESO to confirm the payment method, and amount, to which the deposit balance has been paid.

Payment Method: *

Cash Letter of Credit Cash and Letter of Credit

* Cash Deposit Amount

You must provide an actual cash deposit value greater than \$0.00

Letter of Credit Deposit Amount \$0.00

Total Deposit Amount \$0.00

Total Deposit Value can not be less than the required Deposit Balance

Payment Details

Cash Deposit Instructions

TD Bank
Bank Address: 55 King Street West, Toronto, ON, M5K 1A2
Bank Number: 0004
Transit: 10202
Swift: TD0MCATTTOR
Account: 0690-0458762
Beneficiary: Independent Electricity System Operator (IESO)
Beneficiary Address: 1600-120 Adelaide Street West, Toronto, ON M5H 1T1
Payment Details Note: CA-BRANTFORD-2029

Comment

WITHDRAW SUBMIT

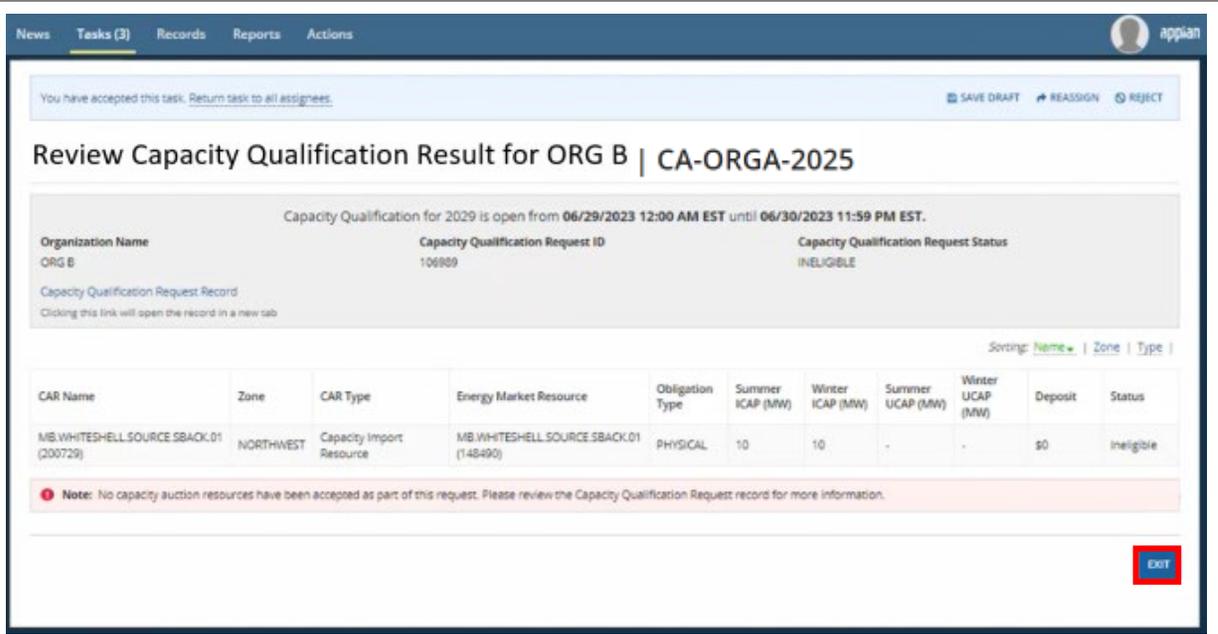
Step	Instruction	Picture
	<p>instructions you will see an item called Payment Details</p> <p>Note: This unique identifier ties the payment to the qualification submission and should be added within the Payment Details field generally found in the payment forms of banking institutions.</p> <p>If you choose Cash and Letter of Credit, you will be required to submit the amount to be provided via each method of payment.</p> <p>The Comments field is available if you choose to enter additional information concerning the deposit payment.</p> <p>Once you have completed your deposit task, click Submit. Proceed to Step 17.</p>	

Step	Instruction	Picture
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16B Task: Review Capacity Qualification Result

You may click into the task to review the assessment results. No additional action is required as part of this task.

Click **Exit**.



17 The IESO will review and confirm the submitted deposit. If additional information is required, you will receive a task to resubmit your deposit, with instructions.

Once the IESO confirms that the deposit has been accepted, you will receive a confirmation email reflecting the qualification results. You can also view your Capacity Qualification Request details

To ORG A,

This is confirmation that the IESO has accepted your capacity qualification information as summarized in the table below:

CAR NAME	ZONE	CAR TYPE	OBLIGATION TYPE	Summer Obligation Period (May 01,2025 - Oct 31,2025)	Winter Obligation Period (Nov 01,2025 - Apr 30,2026)	STATUS
				UCAP (MW)	UCAP (MW)	
THUB (200675)	NORTHEAST	Capacity Dispatchable Load Resource	PHYSICAL	140	112	Accepted
TOTAL				140	112	

Additional Capacity Qualification Request details can also be viewed in the 'Capacity Qualification Requests' record found [here](#).

For general inquiries on this notice, please contact IESOcustomerrelations@ieso.ca.

Regards,
Online IESO

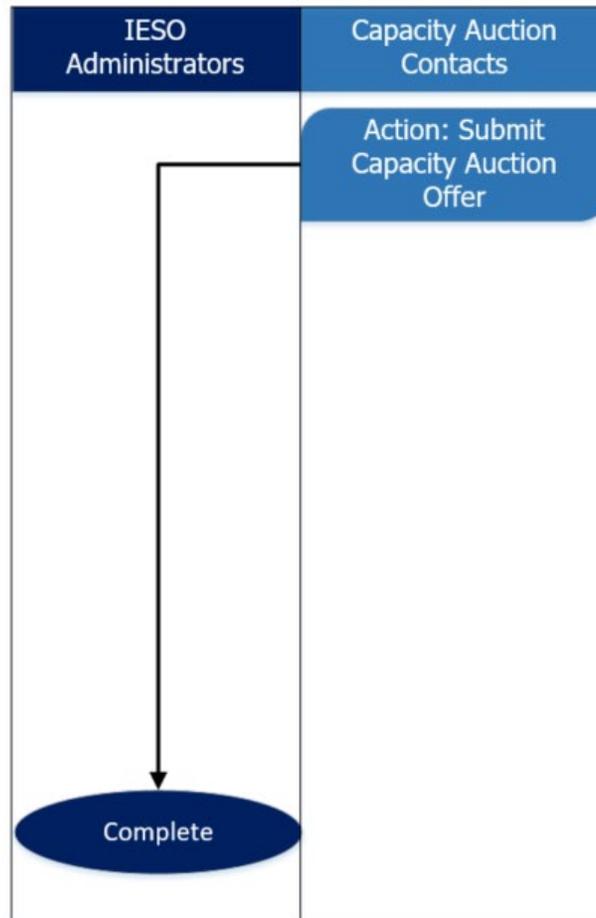
To
ORG A Capacity Auction Contacts

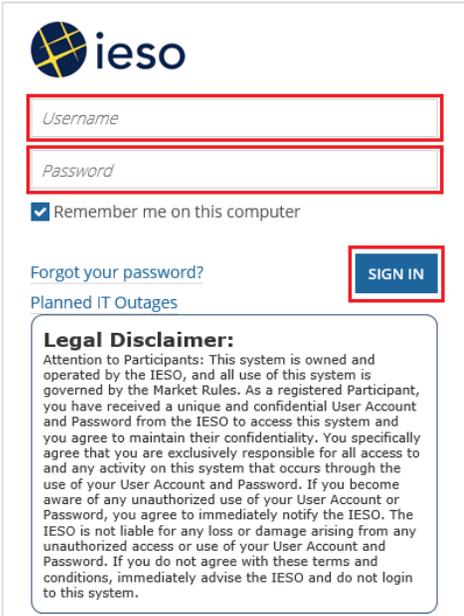
cc
IESO Capacity Auction Specialist

Step	Instruction	Picture
	<p>under the Capacity Qualification Requests record found in the Records tab in Online IESO.</p> <p>You are now qualified to submit offers into the Capacity Auction.</p>	

3. How to Offer Capacity

The following table provides step-by-step instructions, with accompanying screen captures, describing how to offer capacity into the auction using the Online IESO web-based registration system.



Step	Instruction	Picture
1	<p data-bbox="296 253 611 318">Action: Submit Capacity Auction Offer</p> <p data-bbox="296 342 688 553">The person in your organization registered as the Capacity Auction Contact should log in to the Online IESO web-based registration system using this link.</p> <p data-bbox="296 578 667 643">Enter your Username and Password and click Sign In.</p>	
2	<p data-bbox="296 911 663 976">Click Actions on the menu bar at the top of the screen.</p> <p data-bbox="296 1008 674 1195">Click Submit Capacity Auction Offer from the list of available action items displayed on the subsequent screen.</p>	

Step	Instruction	Picture
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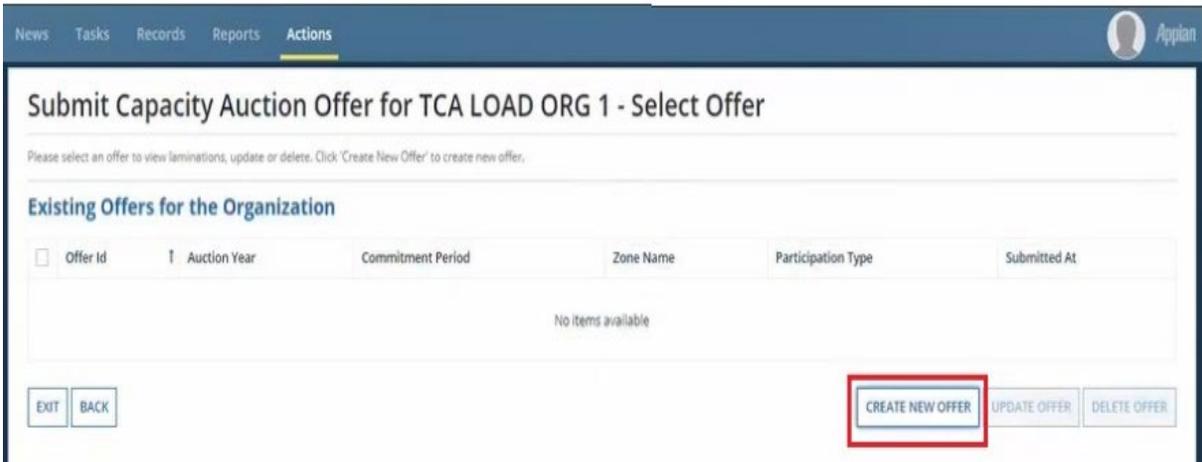
3 The **Submit Capacity Auction Offer – Select Organization** screen is displayed.

Select the option button corresponding to the desired organization, and click **Continue**.



4 A list of existing offers for your organization, if any, is displayed. You have the option to either update any of these existing offers, or create a new offer.

To create a new offer, click **Create New Offer**.



Step	Instruction	Picture
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5 Select the desired Obligation Period (i.e., Summer or Winter), from the **Obligation Period** drop down list.

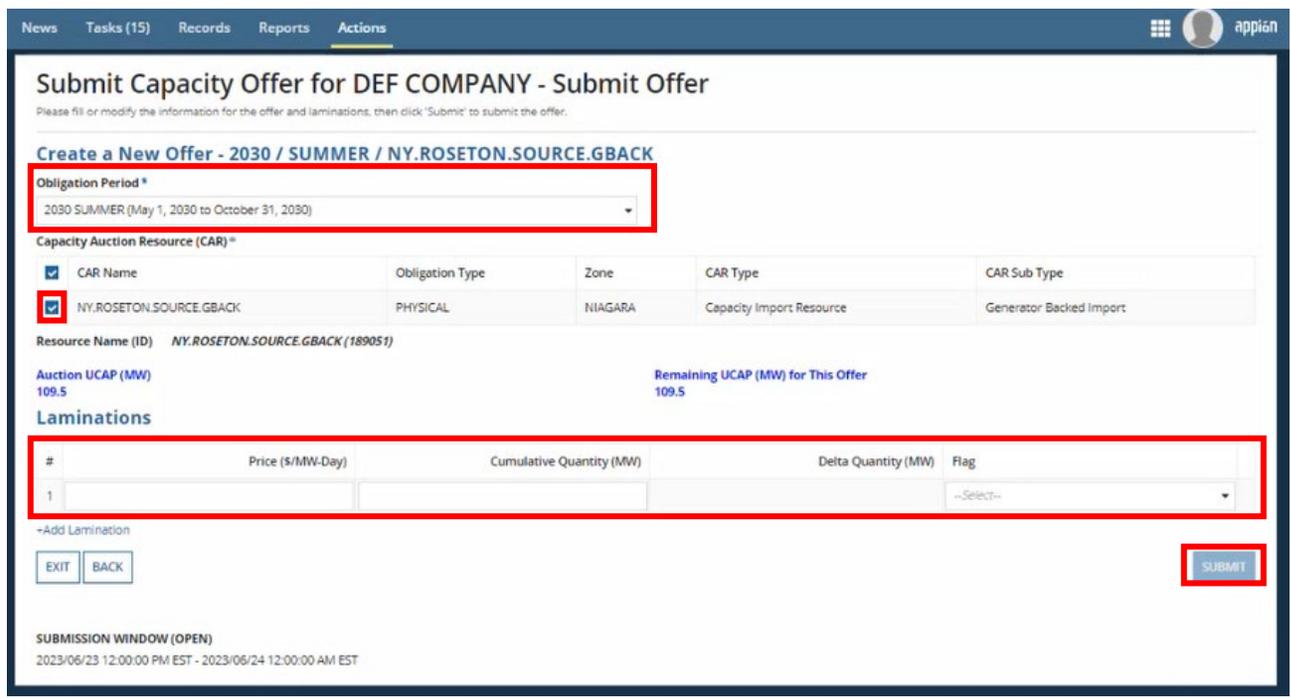
Only Obligation Periods that a resource has capacity qualified for will appear in the drop down list.

Select the **Capacity Auction Resource** for which you wish to submit an offer. The UCAP amount that was qualified for the CAR will be displayed. As capacity is added to an offer, the Remaining UCAP field will be updated.

Submit your offer by first entering the price and cumulative quantity for each lamination.

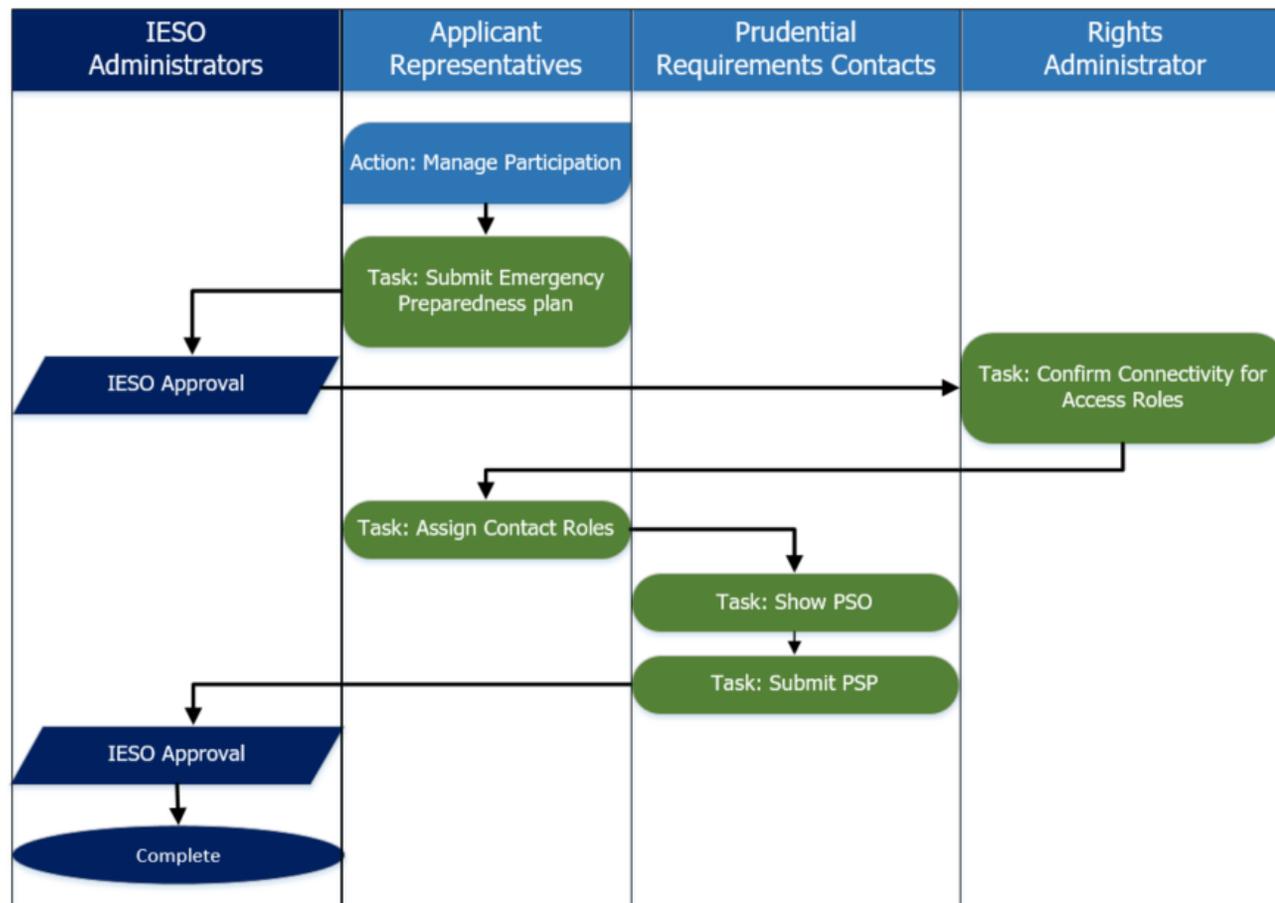
The flag field allows you to indicate whether any quantity associated with the lamination will be offered and subsequently cleared in full or as partial for each lamination. You can submit up to 20 laminations for each resource.

Click **Submit** to complete the offer.



4. How to Authorize as a Capacity Market Participant

The following flow chart and table provides step-by-step instructions, with accompanying screen captures, describing how to become authorized as a Capacity Market Participant (CMP) using the Online IESO web-based registration system.

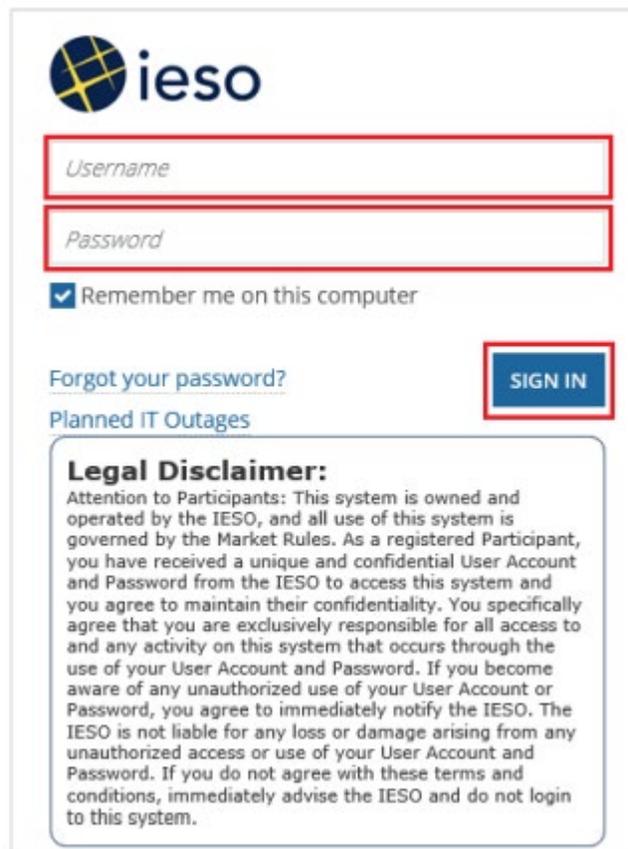


Step	Instruction	Picture
------	-------------	---------

1 [Action: Manage Participation](#)

Log in to the Online IESO web-based registration system using this link.

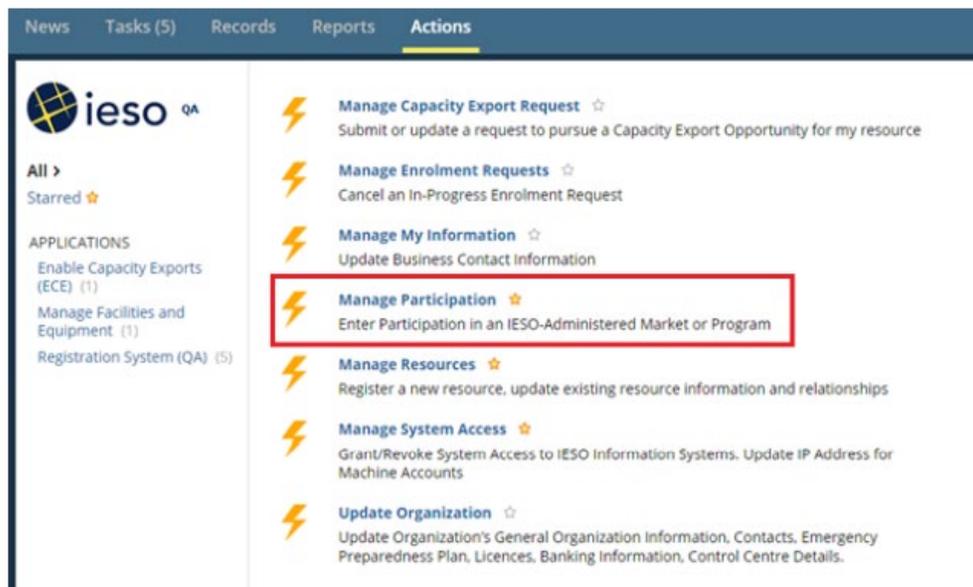
Enter your Username and Password, and click **Sign In**.



Step	Instruction	Picture
------	-------------	---------

2 Click **Actions** on the menu bar at the top of the screen.

Click **Manage Participation** from the list of available action items displayed on the subsequent screen.



3 The **Choose Organization** screen is displayed.

Select the check box corresponding to the organization that you wish to become authorized as a Capacity Market Participant (CMP), and click **Next**.



Step	Instruction	Picture
4	<p>The Select Participation Type screen is displayed.</p> <p>In the Action to Complete drop - down list, select Enter Market Participation, and click Next.</p>	 <p>Select Participation Type</p> <p>Request Details</p> <p>Request Number: 19084 Organization ID: 109111 Organization: POWERTRAIL INC.</p> <p>Action to Complete</p> <p>Select: Enter Market Participation</p> <p>Need Help?</p> <p>Next Cancel</p>
5	<p>The Market Participation screen is displayed.</p> <p>In the Market Participation Type drop -down list, select Capacity Market Participation, and click Next.</p> <p>Note: An organization will only be able to complete the Capacity Market Participant authorization if they've received a capacity obligation in the capacity auction</p>	 <p>Market Participation</p> <p>Please choose a market participation for which authorization will be requested</p> <p>Request Details</p> <p>Request Number: 19084 Organization ID: 109111 Organization: POWERTRAIL INC. Request Type: Enter Market Participation</p> <p>Market Participation Type</p> <p>Market * Capacity Market Participation</p> <p>Need Help?</p> <p>NEXT</p>

Step

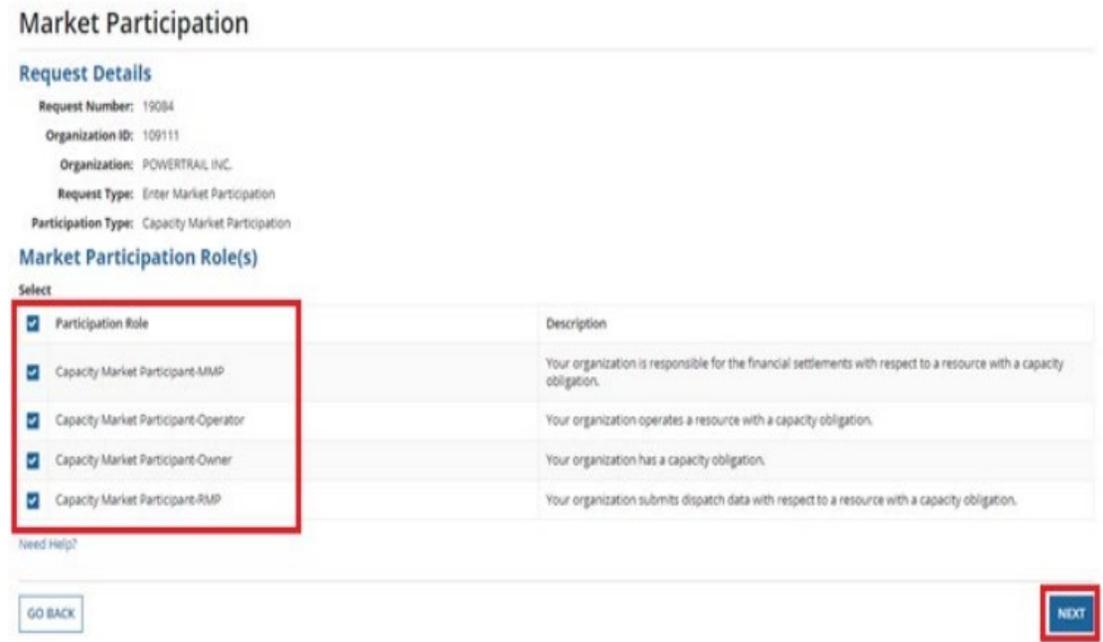
Instruction

Picture

6 Select the appropriate check boxes to select the Market Participant Role(s) for your organization.

Note: You can select multiple roles. If multiple organizations will take on roles, select only the role that applies to your organization. The CAP organization must become the CMP - Owner.

The following steps assume that your organization is taking on all four roles. Click **Next** to proceed.



Step	Instruction	Picture
7	<p>Online IESO automatically determines the next steps and displays these steps on the Required Tasks to Complete screen (depending on the roles selected).</p> <p>Make note of these tasks, and click Proceed. These tasks will also be shown on the News screen.</p> <p>Note: If you are new organization to IESO you will be required to submit the entire next set of required tasks.</p>	

8	<p>Task: Submit Emergency Preparedness Plan</p> <p>Click Tasks on the menu bar at the top of the screen.</p> <p>Click Upload Emergency Preparedness Plan for from the list of available tasks displayed on the subsequent screen.</p> <p>Click Yes to confirm that you accept the task.</p>	
---	---	--

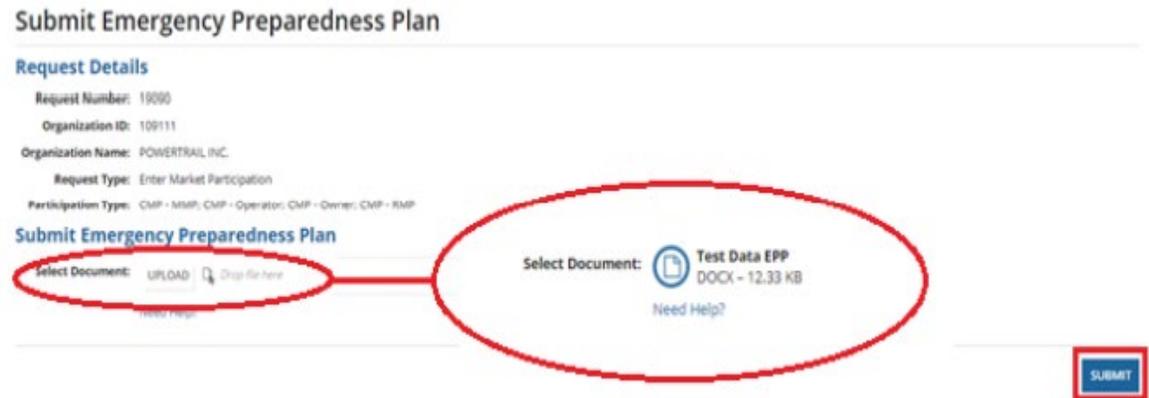
Step Instruction

Picture

9 Click **Accept** at the top of the **Submit Emergency Preparedness Plan** screen, click **Upload** to attach the Emergency Preparedness Plan PDF file, and click **Submit**.

If your organization has previously submitted the Emergency Preparedness Plan, then it will be available for selection or you can choose to upload a new plan.

Further instructions on how to complete an Emergency Preparedness Plan are available [here](#).



10 Click **Tasks** on the menu bar at the top of the screen.

Click **Confirm Connectivity for Organization Access Roles** for from the list of available tasks displayed on the subsequent screen.

Click **Yes** to confirm that you accept the task.

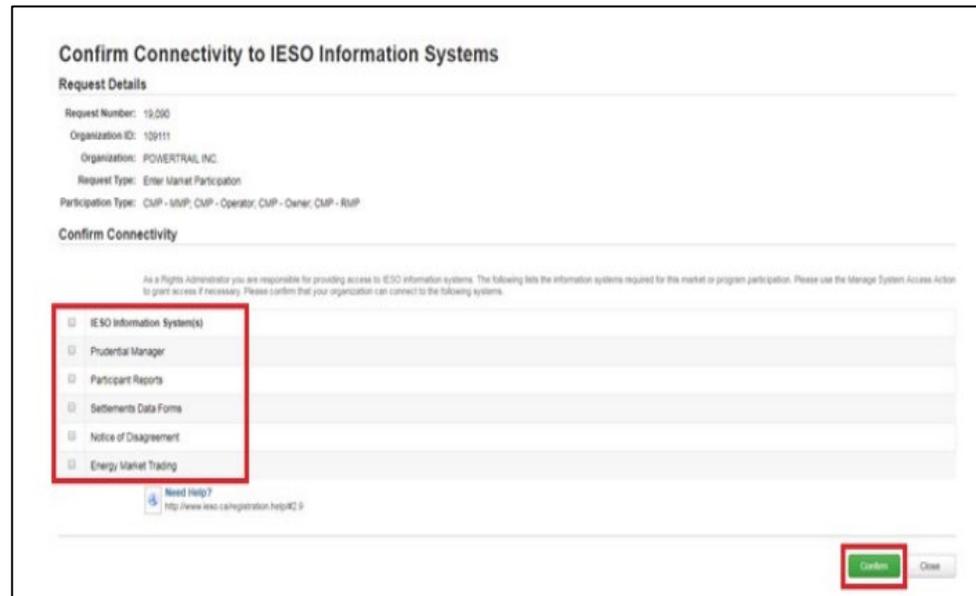


Step Instruction

Picture

11 Separately, confirm that your organization can connect to the tasks listed, then select the appropriate check box(es) via the **Confirm Connectivity to IESO Information Systems** screen, and click Confirm.

Note: The Applicant Representative will receive this task.



12 Task: Assign Contact Roles

Click **Tasks** on the menu bar at the top of the screen.

Click **Assign Contact Role(s)** for **<your organization>** from the list of available tasks displayed on the subsequent screen.

Click **Yes** to confirm that you accept the task.

Note: A CMP has more mandatory contact roles than a CAP.



Step Instruction

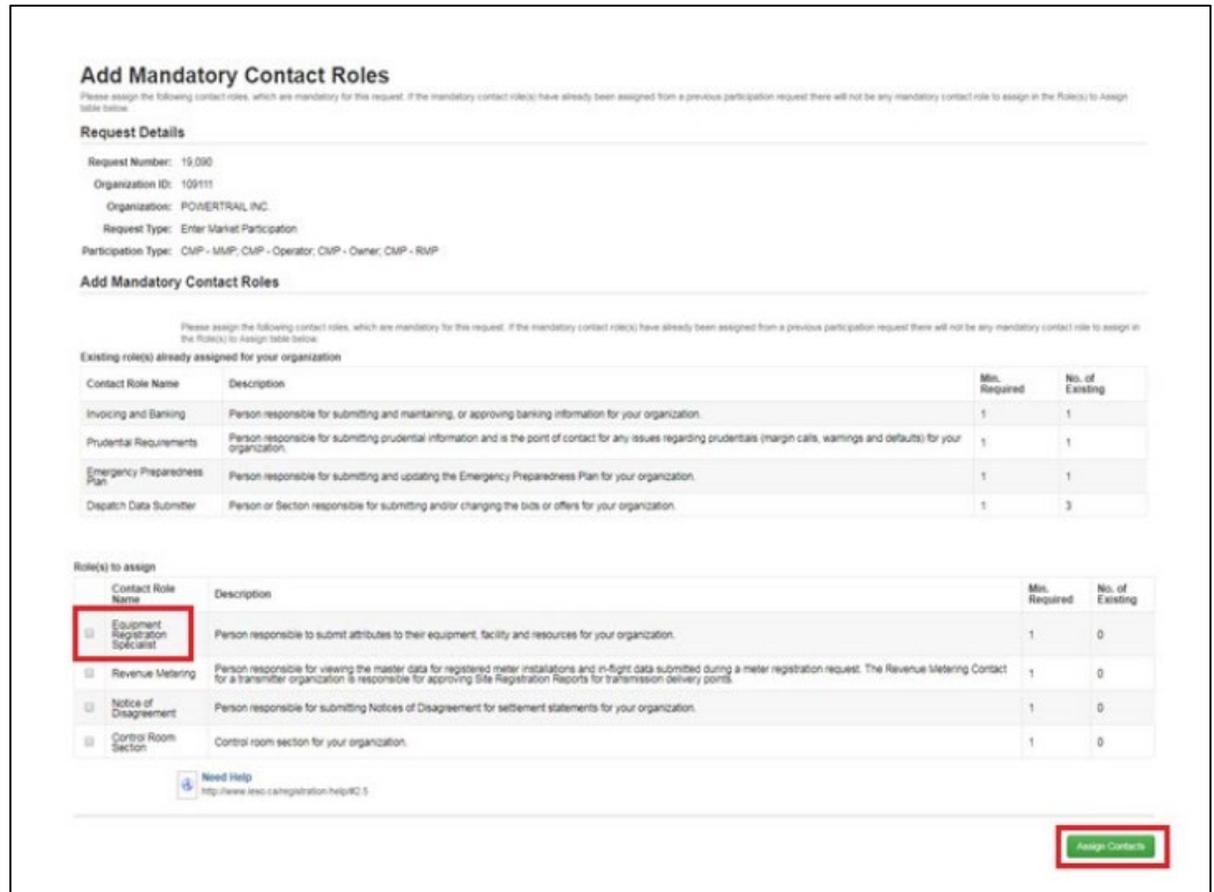
Picture

13 Online IESO automatically determines the contact roles that apply to the CMP roles that you previously selected.

Select the contact role that you wish to assign (you must assign roles one at a time), and click **Assign Contacts**.

At a minimum, one contact is required per Contact Role. If you already have pre-existing contacts assigned, then you are not required to assign any additional contacts.

Note: Mandatory Contact Roles are the same for all organizations regardless of resource type.



Step Instruction

Picture

- 14** The **Choose Contact Type for Assignment** screen is displayed – review and click by Person.
Click **Search for Person** to search for a person registered in the IESO database.

Choose Contact Type for Assignment
Please choose the appropriate assignment group to which contact roles will be assigned.

Request Details

Organization ID: 109111
Organization: POWERTRAIL, INC.
Request Type: Enter Market Participation
Request Number: 19.000
Participation Type: CMP - MWP, CMP - Operator, CMP - Owner, CMP - RWP

Contact Role Details

Contact Role: Equipment Registration Specialist
Name:
Minimum: 1
Required:
Maximum: -
Permitted:
Contact Type: Person

By Person

Search for a Registered Person

Request Details

Request Number: 19000
Organization ID: 109111
Organization: POWERTRAIL, INC.
Request Type: Enter Market Participation
Participation Type: CMP - MWP, CMP - Operator, CMP - Owner, CMP - RWP
Account Type: Person
Contact Role: Equipment Registration Specialist
Name:

Search for a Registered Person

Search for the registered person using the following search fields. Enter complete information to retrieve accurate results. At least one field must be filled in for the search. If the person is not found after a search, the person can then be registered.

Person ID:
Last Name:
First Name:

Search for Person

Step Instruction

Picture

15 If a person is registered in the IESO database, that name appears in the Search Results via the **Select Registered Person** screen. Select the corresponding check box, and click Next.

If a person is not already in the IESO database, you must register that individual by clicking **Register New Person**, and providing their contact information.

Repeat for each contact role. Once all mandatory roles have been assigned, click **Done**.

Select Registered Person

Request Details
Request Number: 1000
Organization ID: 100111
Organization: POWERTRAK, INC.
Request Type: Enter Market Participation
Participation Type: CDP - MSP, CDP - Operator, CDP - Owner, CDP - ROP
Account Type: Person
Contact Role: Equipment Registration Specialist
Name:

Search Results

Person ID	Last Name	First Name	Preferred Name	Middle Name
<input type="checkbox"/> 2123	Berry	Berry		
<input type="checkbox"/> 2124	Tenigin	Claudio		
<input type="checkbox"/> 2125	Lovelady	Olav		
<input type="checkbox"/> 2127	Branch	Tony		
<input type="checkbox"/> 2130	Stanton	Brent		
<input type="checkbox"/> 101440	Papenhall	Debra		
<input type="checkbox"/> 101050	Amos	Chris		
<input type="checkbox"/> 100010	Van Nest	Greg		
<input type="checkbox"/> 05000	Brown	Paul		
<input type="checkbox"/> 101000	Fraser	Pat		

1-10 of 5,707

If you do not see the correct person, please refine your search in the fields below.

Person ID:
Last Name:
First Name:

Register a New Person

Request Details
Request Number: 1000
Organization ID: 100111
Organization: POWERTRAK, INC.
Request Type: Enter Market Participation
Contact Role: Notice of Disagreement
Name:

Please fill in the mandatory information below. The address fields have been populated with the organization's registered address but can be modified. Please note an email will be sent to this person upon registration.

Person Information

*First Name:
*Last Name:
*Main Phone:
Main Phone Extension: (Numbers only)
*Main Email:

*Address Line 1: 3025 Adison Road 50rth
Address Line 2:
Address Line 3:
Address Line 4:
*City: Ottawa
*Province/State: Ontario
*Postal Code (Zip Code): K1G 3S4
*Country: Canada

<http://www.ieso.ca/registration-help/#1.2>

Step Instruction

Picture

16 After all roles are filled with the appropriate registered person(s), the **Add Mandatory Contact Roles** screen is displayed – click **Done**.

Add Mandatory Contact Roles

Please assign the following contact roles, which are mandatory for this request. If the mandatory contact role(s) have already been assigned from a previous participation request there will not be any mandatory contact role to assign in the Role(s) to Assign table below.

Request Details

Request Number: 19280
 Organization ID: 109111
 Organization: POWERTRAIL INC.
 Request Type: Enter Market Participation
 Participation Type: CMP - SMP, CMP - Operator, CMP - Owner, CMP - RMP

Add Mandatory Contact Roles

Please assign the following contact roles, which are mandatory for this request. If the mandatory contact role(s) have already been assigned from a previous participation request there will not be any mandatory contact role to assign in the Role(s) to Assign table below.

Existing role(s) already assigned for your organization

Contact Role Name	Description	Min. Required	No. of Existing
Equipment Registration Specialist	Person responsible to submit attributes to their equipment, facility and resources for your organization.	1	1
Trading and Billing	Person responsible for submitting and maintaining, or approving billing information for your organization.	1	1
Prudential Requirements	Person responsible for submitting prudential information and is the point of contact for any issues regarding prudentials (margin calls, warnings and defaults) for your organization.	1	1
Emergency Preparedness Plan	Person responsible for submitting and updating the Emergency Preparedness Plan for your organization.	1	1
Revenue Metering	Person responsible for viewing the master data for registered meter installations and in-flight data submitted during a meter registration request. The Revenue Metering Contact for a transmitter organization is responsible for approving Site Registration Reports for transmission delivery points.	1	1
Notice of Disagreement	Person responsible for submitting Notices of Disagreement for settlement statements for your organization.	1	1
Dispatch Data Submitter	Person or Section responsible for submitting and/or changing the bids or offers for your organization.	1	2
Control Room Section	Control room section for your organization.	1	1

⏪ ⏩ 1-8 of 8 ⏪ ⏩

Role(s) to assign

Contact Role Name	Description	Min. Required	No. of Existing
No items available			

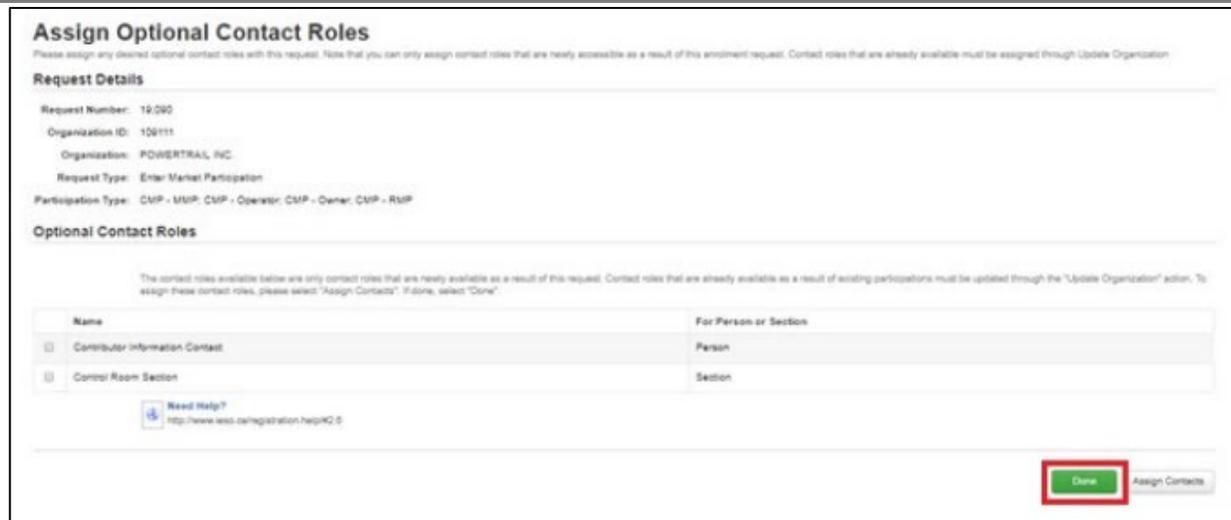
[Need Help](http://www.ieso.com/registration-help/RC2)
<http://www.ieso.com/registration-help/RC2>

Done

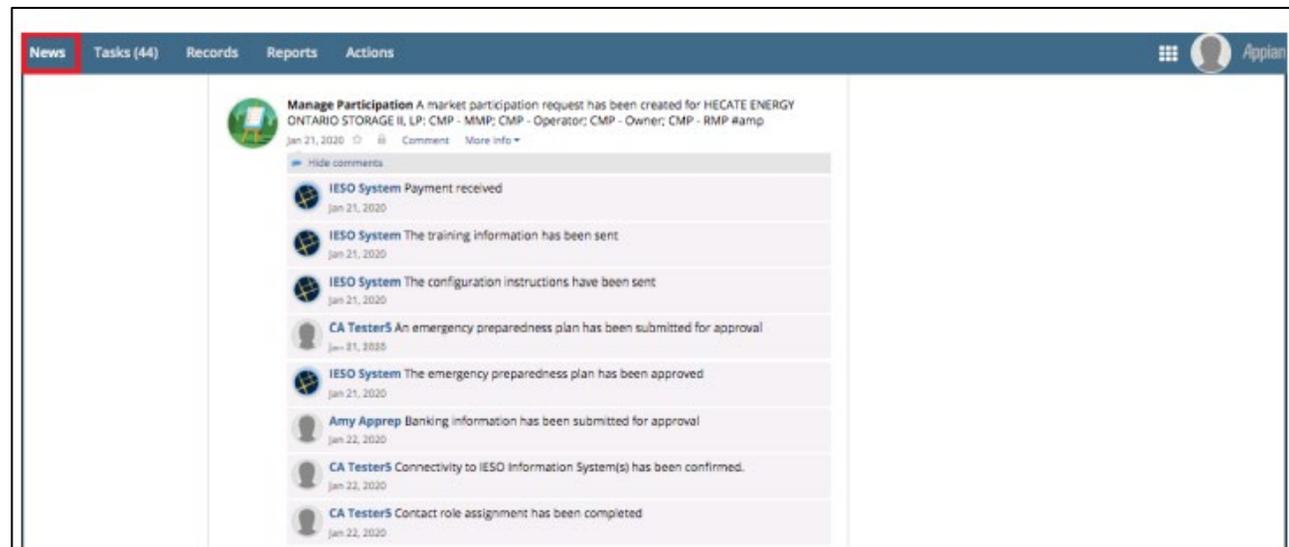
Step Instruction

Picture

17 The **Assign Optional Contact Roles** screen is displayed – click **Done**.



18 You can verify completion on the **News** screen and viewing a notification that contact roles assignment has been completed.



Step Instruction

Picture

19 Task: Show PSO (Prudential Support Obligation)

Click **Tasks** on the menu bar at the top of the screen.

Click **Show PSO for <your organizations>** from the list of available tasks displayed on the subsequent screen.

Click **Yes** to confirm that you accept the task.

Note: This task is made available after the Prudential Requirements contact is assigned as part of Assign Contact Role(s).



Step Instruction

Picture

20 The Capacity Prudential Support Information screen is displayed - click **Submit**.

Capacity Prudential Support Information

This is the capacity prudential support obligation for POWERTRAIL INC.

Capacity Prudential Support Obligation

Capacity Prudential Support Obligation: \$12,650.00

Capacity Prudential Support Obligation Details

Commitment Details:

Auction Capacity (MW)	Year	Season	Zone	Type	Clearing Price
11	2019	WINTER	BRUCE	PHYSICAL	\$100.00

Total Commitment Capacity (MW): 11

Availability Payment: \$25,500.00

Business Days: 23

Capacity Support Obligation Percentage: 50

Capacity PSO Prior To Reduction: \$12,650.00

Agency Name:

Credit Rating Reduction: \$0.00

Good Payment Years: 0

Payment History Reduction: \$0.00

SUBMIT

Step Instruction

Picture

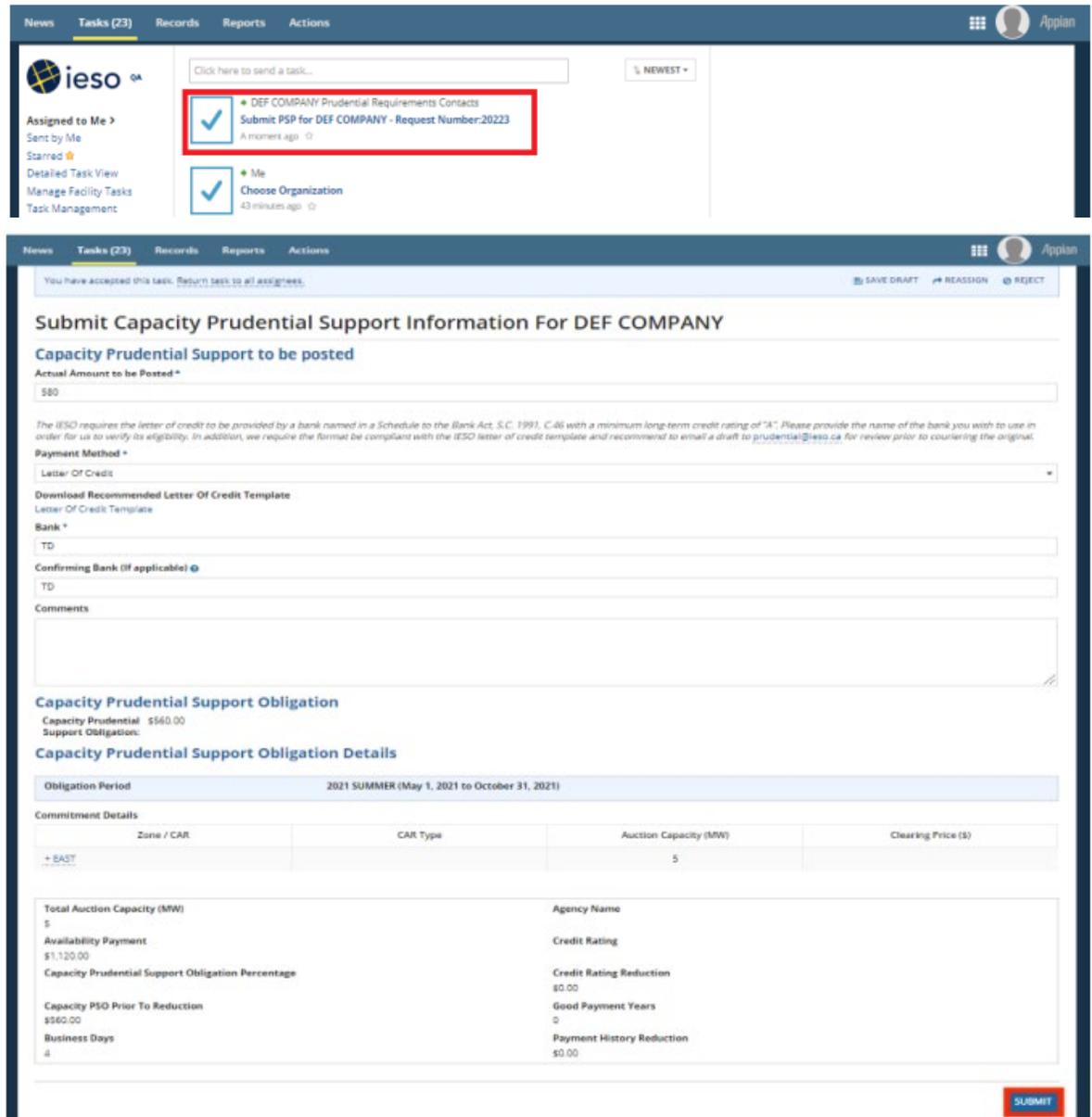
21 Task: Submit PSP (Prudential Support Posted)

Click **Tasks** on the menu bar at the top of the screen.

Click **Submit PSP for <your organizations>** from the list of available tasks displayed on the subsequent screen.

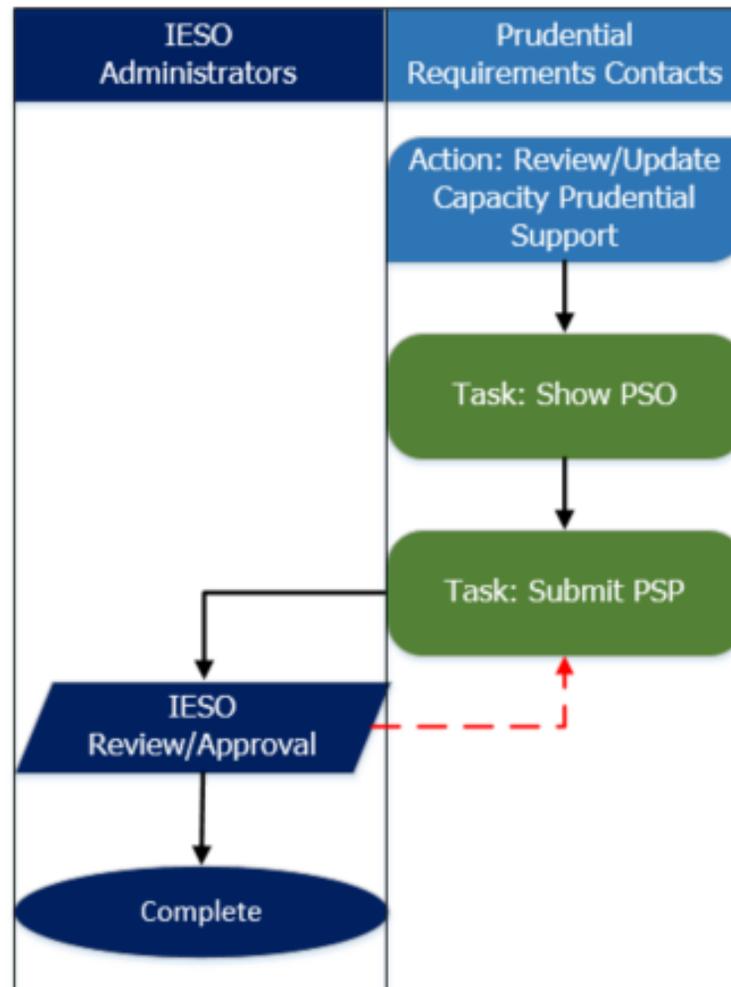
Enter the required prudential support obligation amount in the **Actual Amount to be Posted** field, select the Payment Method from the **Payment Method** drop-down list (the Letter of Credit must be provided per the template), enter bank name in the **Bank field**, and click **Submit** to confirm the information submission.

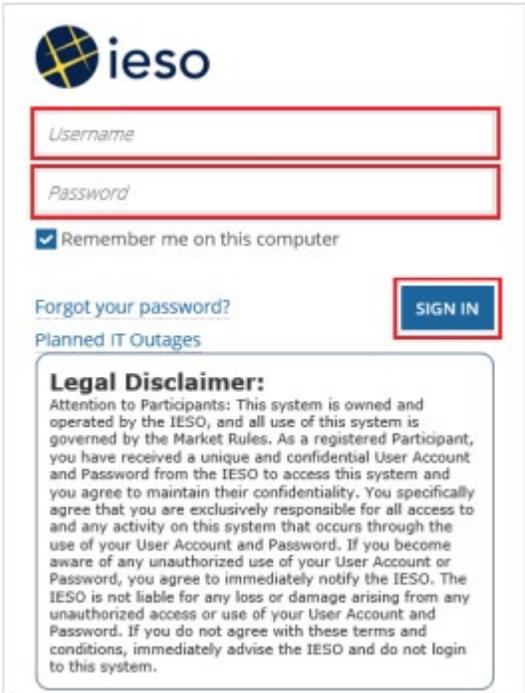
Following the submission, you may proceed with sending the funds to the IESO using the payment method specified.



5. How to Review/Update Capacity Prudential Support

The following chapter provides step-by-step instructions, with accompanying screen captures, describing the process for reviewing/updating capacity prudential support using the Online IESO web-based system.



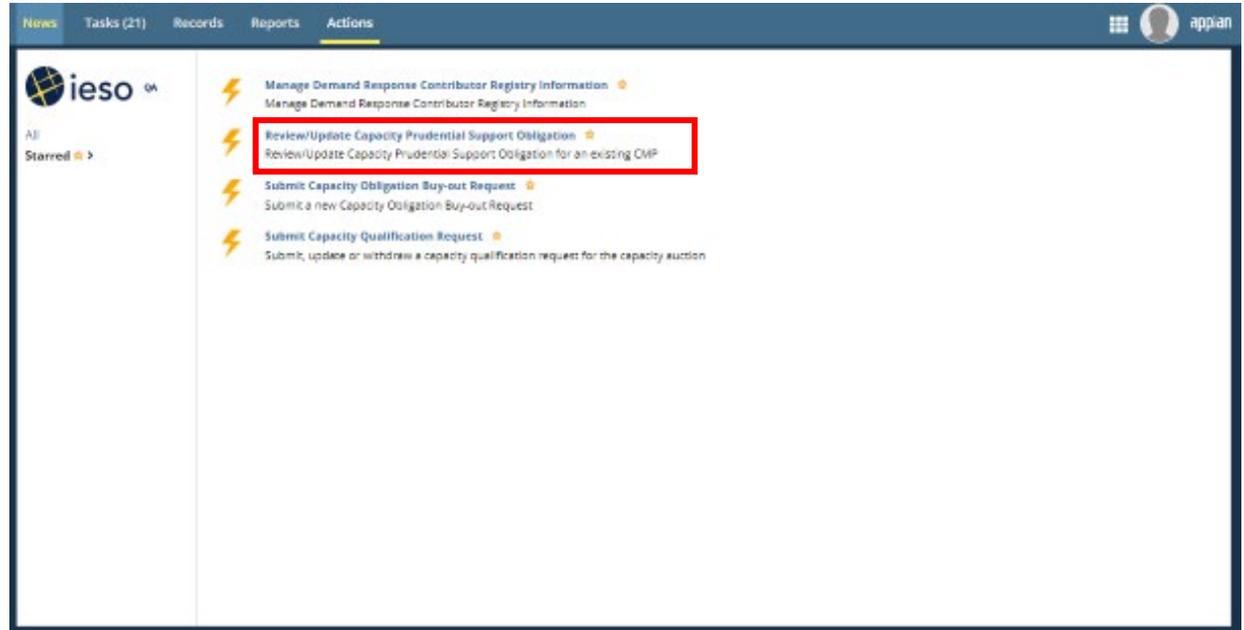
Step	Instruction	Picture
1	<p data-bbox="310 215 787 285">Action: Review/Update Capacity Prudential Support.</p> <p data-bbox="310 305 787 410">Log in to the Online IESO web-based registration system using this link.</p> <p data-bbox="310 430 787 500">Enter your Username and Password and click Sign In.</p>	 <p data-bbox="1024 285 1199 345">ieso</p> <p data-bbox="1031 367 1486 418">Username</p> <p data-bbox="1031 423 1486 475">Password</p> <p data-bbox="1024 488 1329 513"><input checked="" type="checkbox"/> Remember me on this computer</p> <p data-bbox="1024 553 1220 578">Forgot your password?</p> <p data-bbox="1402 537 1486 586">SIGN IN</p> <p data-bbox="1024 586 1192 610">Planned IT Outages</p> <p data-bbox="1031 630 1255 654">Legal Disclaimer:</p> <p data-bbox="1031 659 1465 935">Attention to Participants: This system is owned and operated by the IESO, and all use of this system is governed by the Market Rules. As a registered Participant, you have received a unique and confidential User Account and Password from the IESO to access this system and you agree to maintain their confidentiality. You specifically agree that you are exclusively responsible for all access to and any activity on this system that occurs through the use of your User Account and Password. If you become aware of any unauthorized use of your User Account or Password, you agree to immediately notify the IESO. The IESO is not liable for any loss or damage arising from any unauthorized access or use of your User Account and Password. If you do not agree with these terms and conditions, immediately advise the IESO and do not login to this system.</p>

Step

Instruction

Picture

- 2 Click **Actions** on the menu bar at the top of the page.
- Select **Review/Update Capacity Prudential Support Obligation** from the list of available action items displayed on the subsequent screen.



Step

Instruction

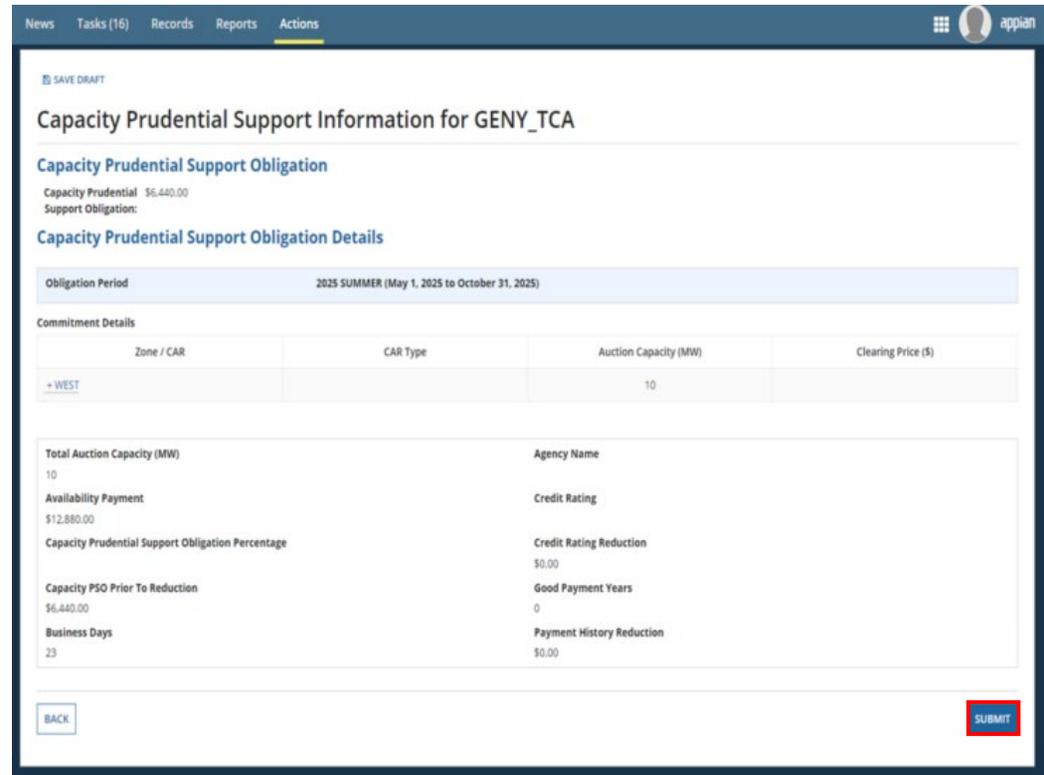
Picture

3

On the following screen, the **Capacity Prudential Support Information** screen is displayed and displays the estimated PSO amount for the upcoming obligation.

If your existing prudential support covers the required amount, then click **Back**. No additional action is required.

If you need to post additional prudential support, click **Submit**. A dialog box will confirm **Do you wish to continue?** Click **Yes**.



Step

Instruction

Picture

4

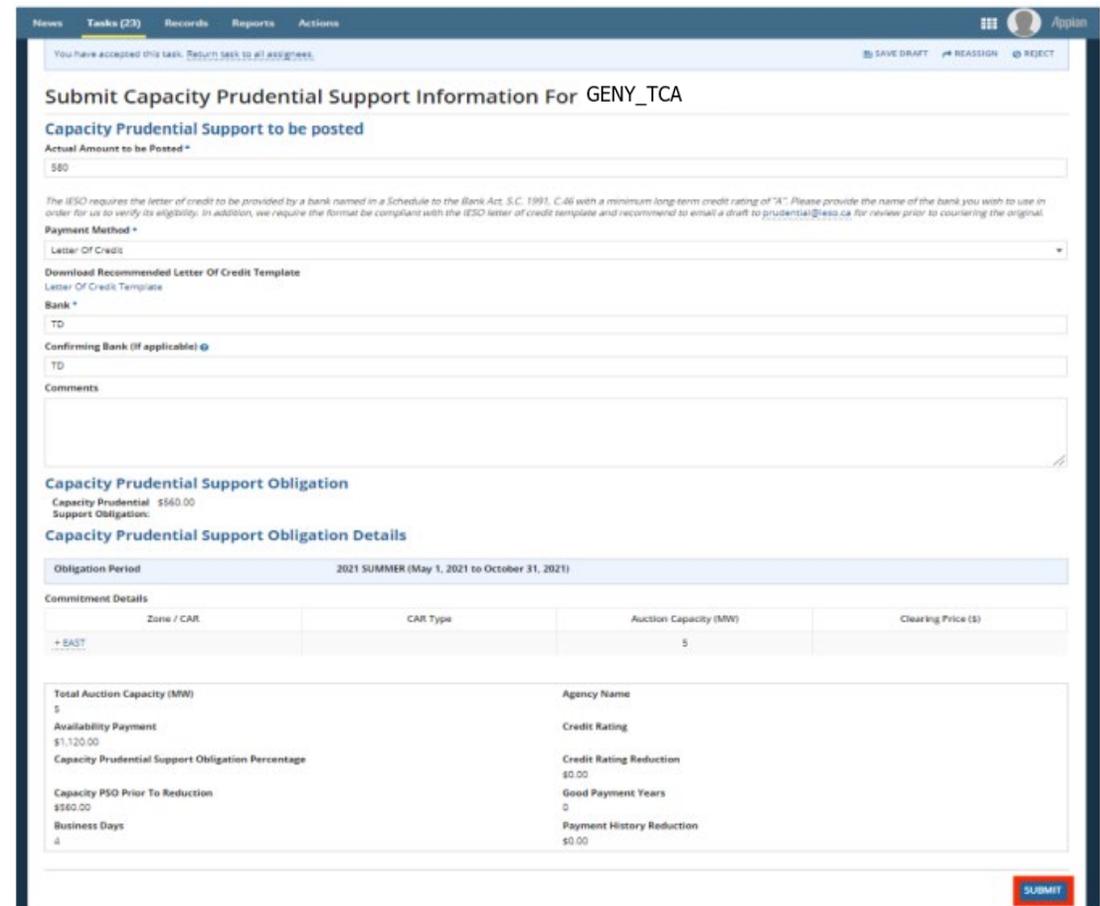
Task: Submit PSP (Prudential Support Posted)

Once IESO confirms the prudential support, a task will be generated in Online IESO. Click **Tasks** on the menu bar at the top of the screen.

Click **Submit PSP for <your organizations>** from the list of available tasks displayed on the subsequent screen.

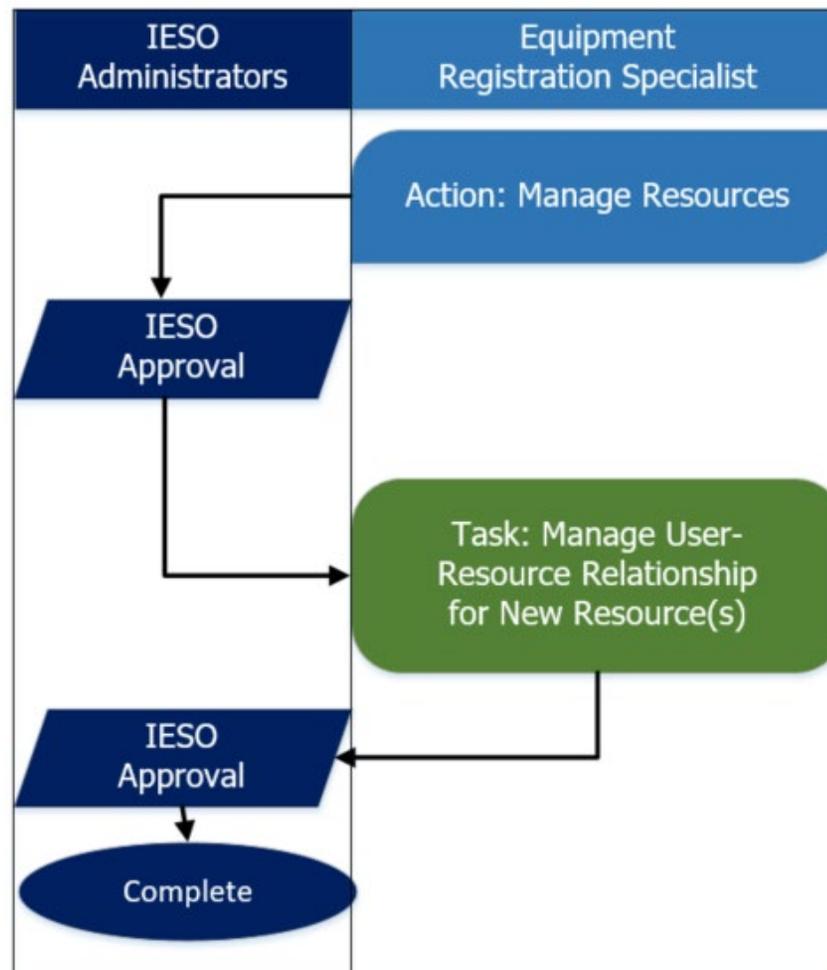
Enter the required prudential support obligation amount in the **Actual Amount** to be Posted field, select the Payment Method from the **Payment Method** drop-down list (the Letter of Credit must be provided per the template), enter bank name in the **Bank field**, and click **Submit** to confirm the information submission.

Following the submission, you may proceed with sending the funds to the IESO using the payment method specified.



6. How to Register a Virtual Demand Response Resource

The following table provides step-by-step instructions, with accompanying screen captures, describing how to register/update virtual Demand Response Resources using the Online IESO web-based registration system.



Step Instruction

Picture

1 **Action: Manage Resources**

Log in to the Online IESO web-based registration system using this [link](#).

Enter your Username and Password, and click **Sign In**.

ieso

Username

Password

Remember me on this computer

[Forgot your password?](#)

[Planned IT Outages](#)

SIGN IN

Legal Disclaimer:
Attention to Participants: This system is owned and operated by the IESO, and all use of this system is governed by the Market Rules. As a registered Participant, you have received a unique and confidential User Account and Password from the IESO to access this system and you agree to maintain their confidentiality. You specifically agree that you are exclusively responsible for all access to and any activity on this system that occurs through the use of your User Account and Password. If you become aware of any unauthorized use of your User Account or Password, you agree to immediately notify the IESO. The IESO is not liable for any loss or damage arising from any unauthorized access or use of your User Account and Password. If you do not agree with these terms and conditions, immediately advise the IESO and do not login to this system.

Step	Instruction	Picture
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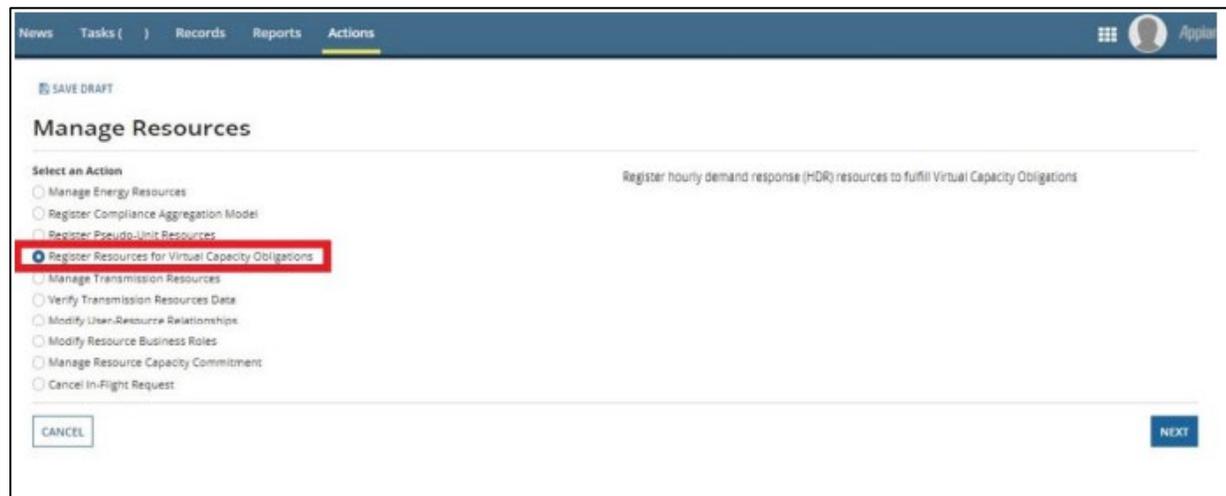
2 Click **Actions** on the menu bar at the top of the screen.

Select **Manage Resources** from the list of available action items displayed on the subsequent screen.

Note: In order to assign capacity, if you already have resources assigned to your virtual CARs, use the Manage Demand Response Contributor Registry Information action (7: How to Manage Contributors for Virtual HDR Resources).



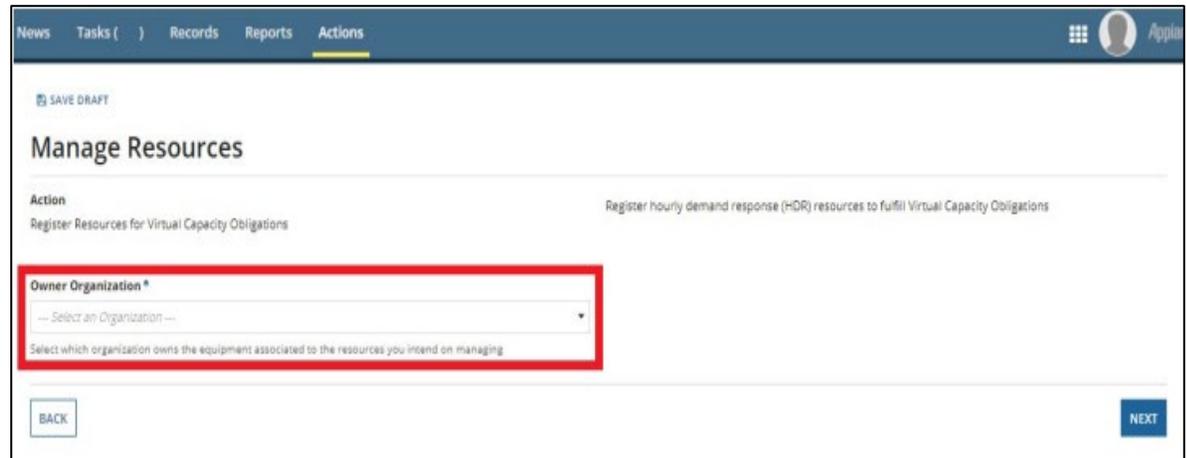
3 The **Manage Resources** screen is displayed. Select the option corresponding to **Register Resources for Virtual Capacity Obligations**, and click Next.



Step Instruction

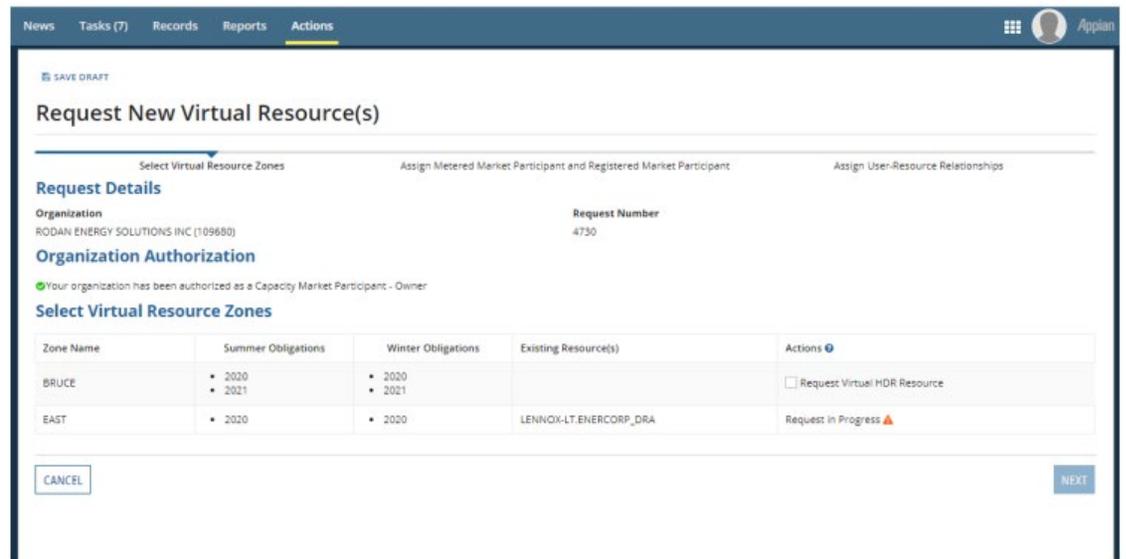
Picture

4 On the following screen, select from the drop down list the name of the organization that owns the equipment associated to the resource you intend on managing, and click **Next**.



5 The Request New Virtual Resource(s) screen is displayed. Select the check box corresponding to the zone(s) requiring a resource, and click **Next**.

Note: After finishing this process, a virtual resource is assigned to your virtual obligation.



Step Instruction

Picture

6 Identify the Metered Market Participant (MMP), the Registered Market Participant (RMP), and the Virtual DR Resource Type for each resource, and click **Submit Request**.

Note: After the IESO approves the resource modelling name, another task is initiated.

Register Virtual Resources

Request Details

Organization: RODAN ENERGY SOLUTIONS INC (109680) | Request Number: 4730

Assign Metered Market Participant (MMP) and Registered Market Participant (RMP)

BRUCE

Resource Name: BRUCE-LT.ENERCORP_DRA
 Note: This is a preliminary name that will be reviewed by IESO

Demand Response Owner: RODAN ENERGY SOLUTIONS INC

Virtual DR Resource Type: Commercial & Industrial Residential

Metered Market Participant (MMP): RODAN ENERGY SOLUTIONS INC

Registered Market Participant (RMP): RODAN ENERGY SOLUTIONS INC

Obligation Period	Obligation (MW)
Summer 2020	4.5
Winter 2020	4.5

Obligation Period	CAR ID	CAR Name	CAR Type	Obligation (MW)
Summer 2021	100343	Rodan1	Virtual Hourly Demand Response - C&I	50
Winter 2021	100343	Rodan1	Virtual Hourly Demand Response - C&I	50
Summer 2021	100344	Rodan2	Virtual Hourly Demand Response - Residential	5
Winter 2021	100344	Rodan2	Virtual Hourly Demand Response - Residential	5

CANCEL | SUBMIT REQUEST

Step Instruction

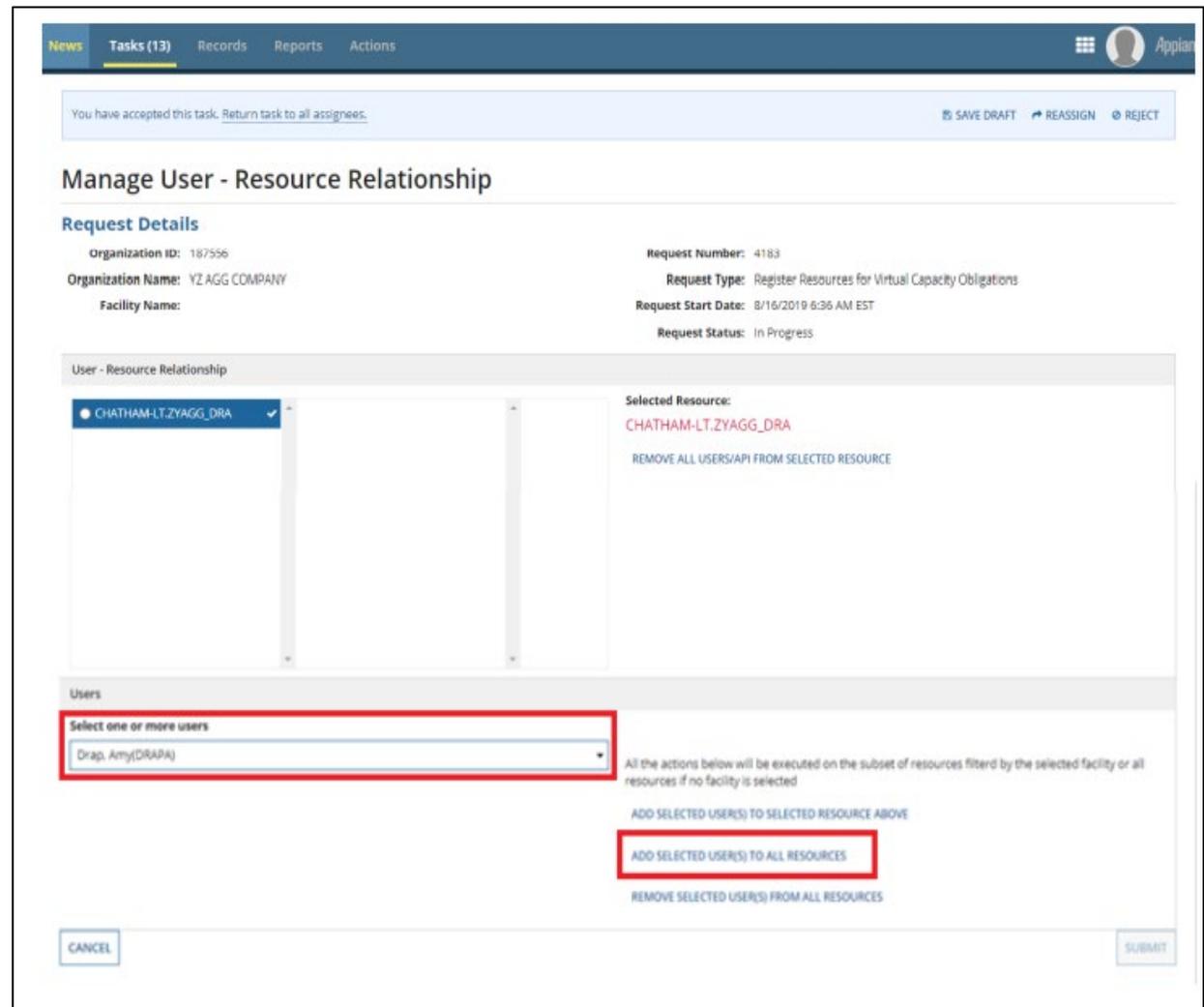
Picture

7 Task: Manage User -Resource Relationship for New Resource(s)

Click **Tasks** on the menu bar at the top of the screen. Select **Manage User - Resource Relationship** for **New Resources <your organization>** from the list of available tasks displayed on the subsequent screen.

The Manage User – Resource Relationship screen is displayed. Select the appropriate resource(s), and click Add Selected User(s) to all Resources.

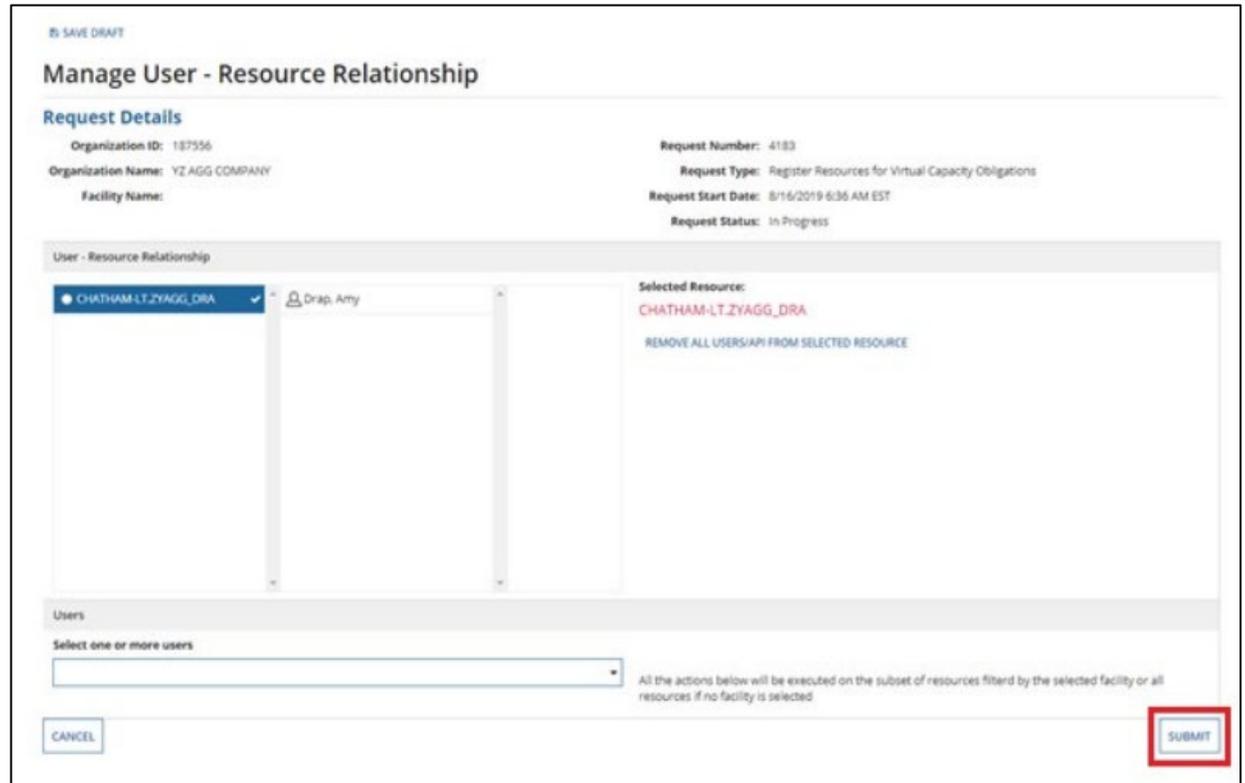
Note: An Applicant Representative can compete this. It takes a day for the IESO system to process the change.



Step Instruction

Picture

- 8** Review/confirm your selection, and click **Submit**.



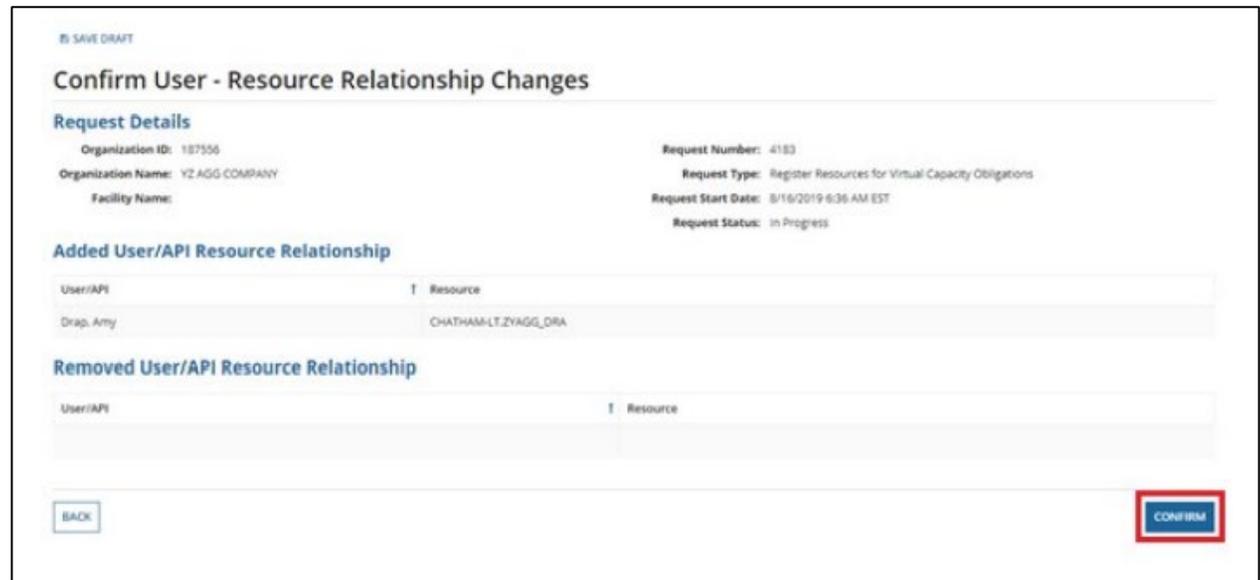
Step Instruction

Picture

9 The Confirm User – Resource Relationship Changes screen is displayed.

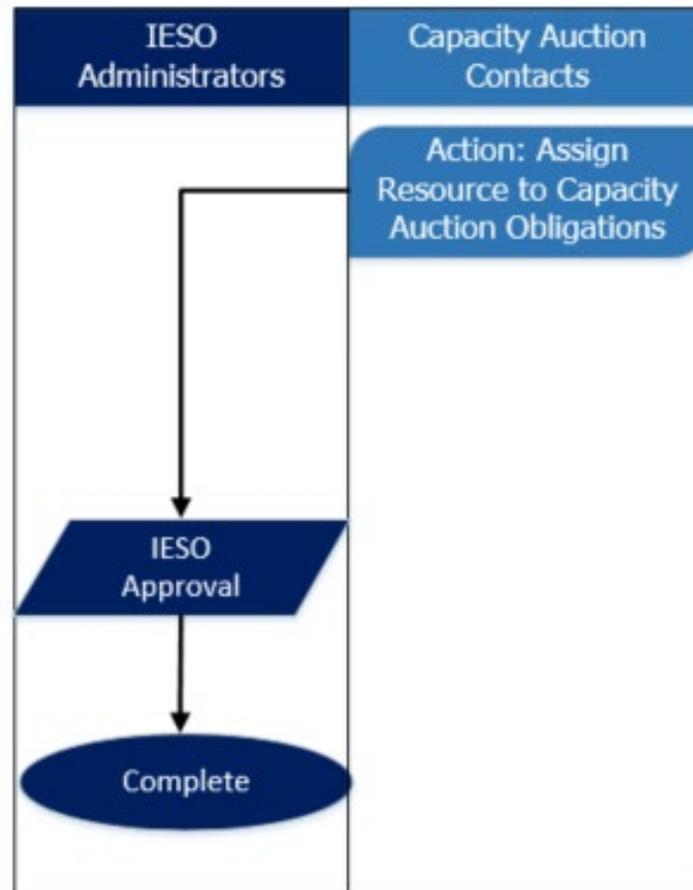
Click **Confirm**.

Note: The IESO issues a Registration Approval Notice (RAN) after completing an assessment of the submission



7. How to Assign a New Physical DR Resource to an Obligation

The following table provides step-by-step instructions, with accompanying screen captures, describing how to assign physical resources to a Capacity Obligation using the Online IESO web-based registration system.

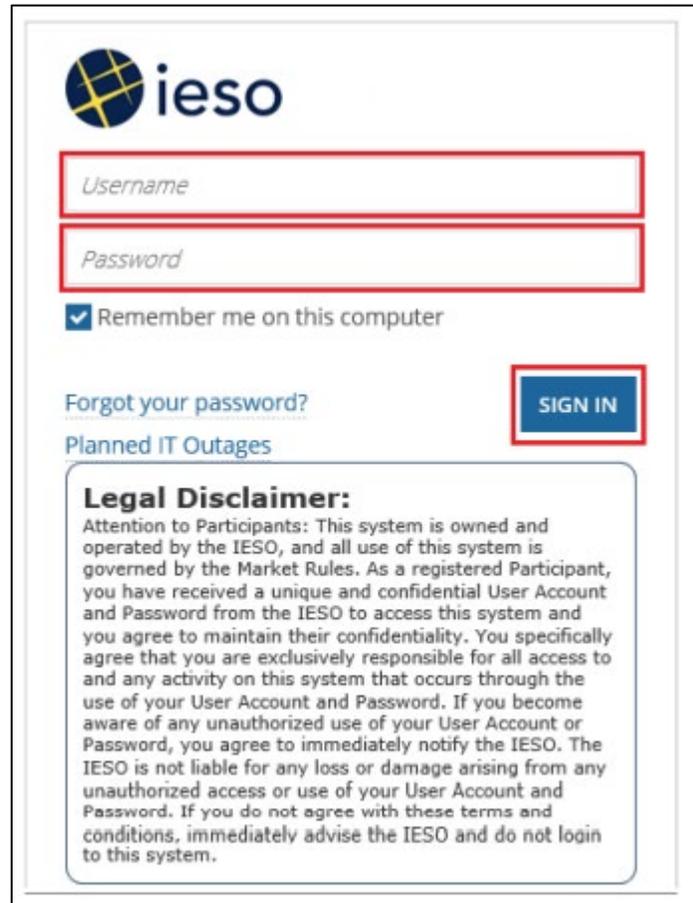


Step Instruction

Picture

1 Action: Assign Resource to Capacity Obligation

Log in to the Online IESO web-based registration system using this [link](#). Enter your Username and Password, and click **Sign In**.



2 Click **Actions** on the menu bar at the top of the screen.

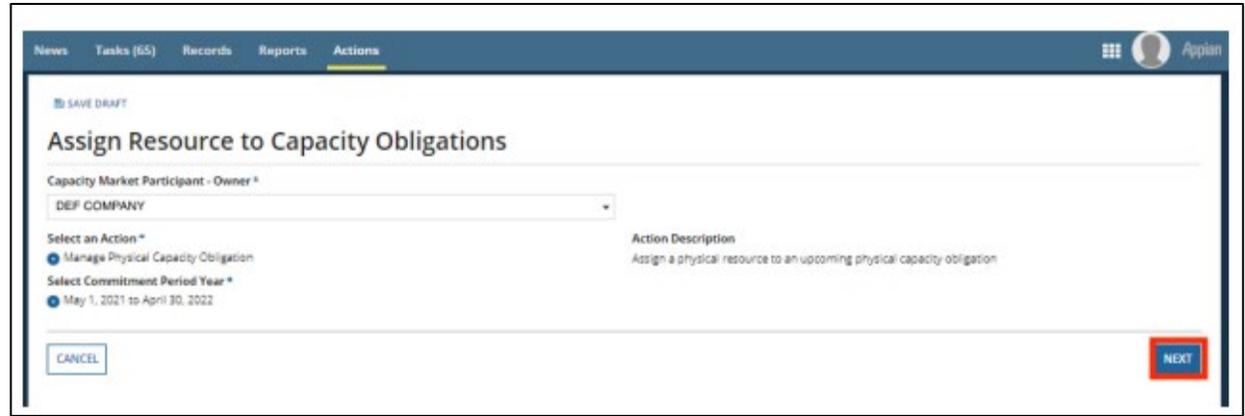
Select **Assign Resource to Capacity Auction Obligations** from the list of available action items displayed on the subsequent screen.



Step Instruction

Picture

- 3** The **Assign Resource to Capacity Obligations** screen is displayed. Select the CMP name from the drop -down list.
- Online IESO will pre -select the available action(s). If needed, select the **Action** and **Commitment Year**, and click **Next**.

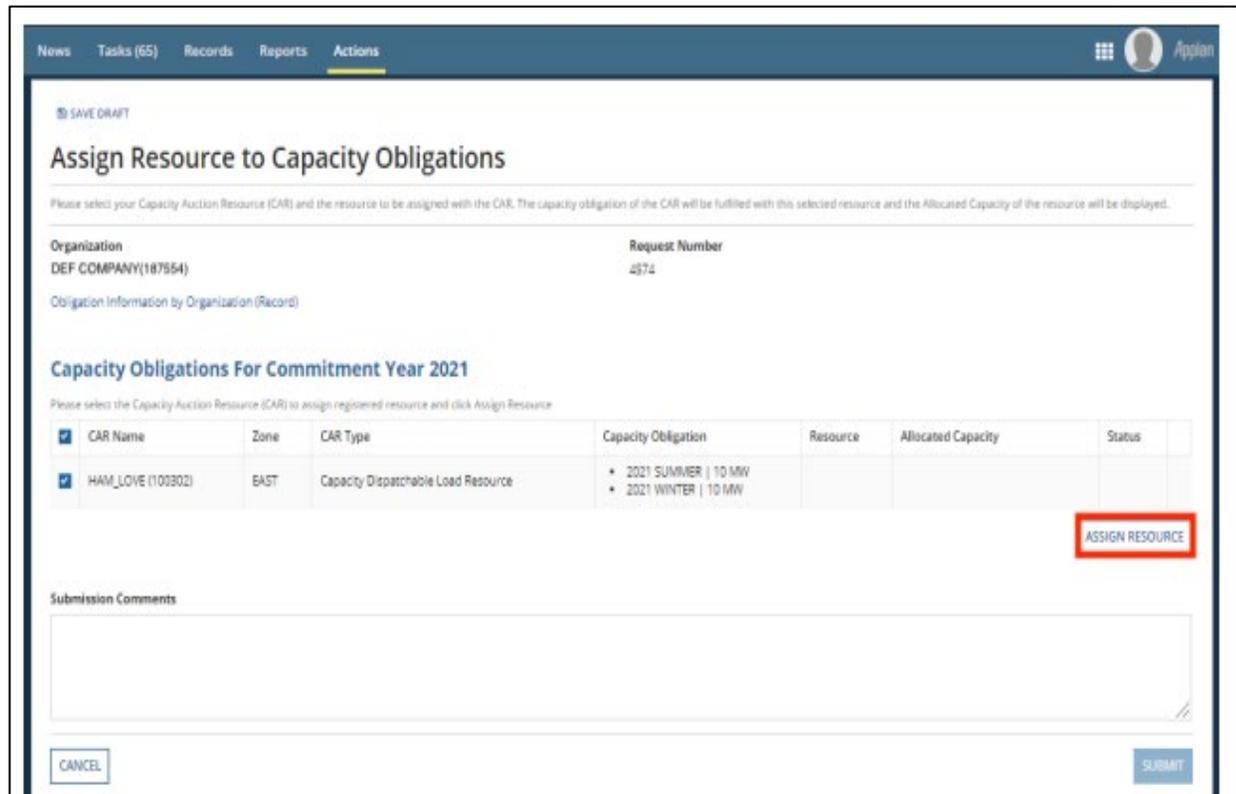


Step Instruction

Picture

4 On the following screen, your capacity obligations for the selected commitment period will be displayed.

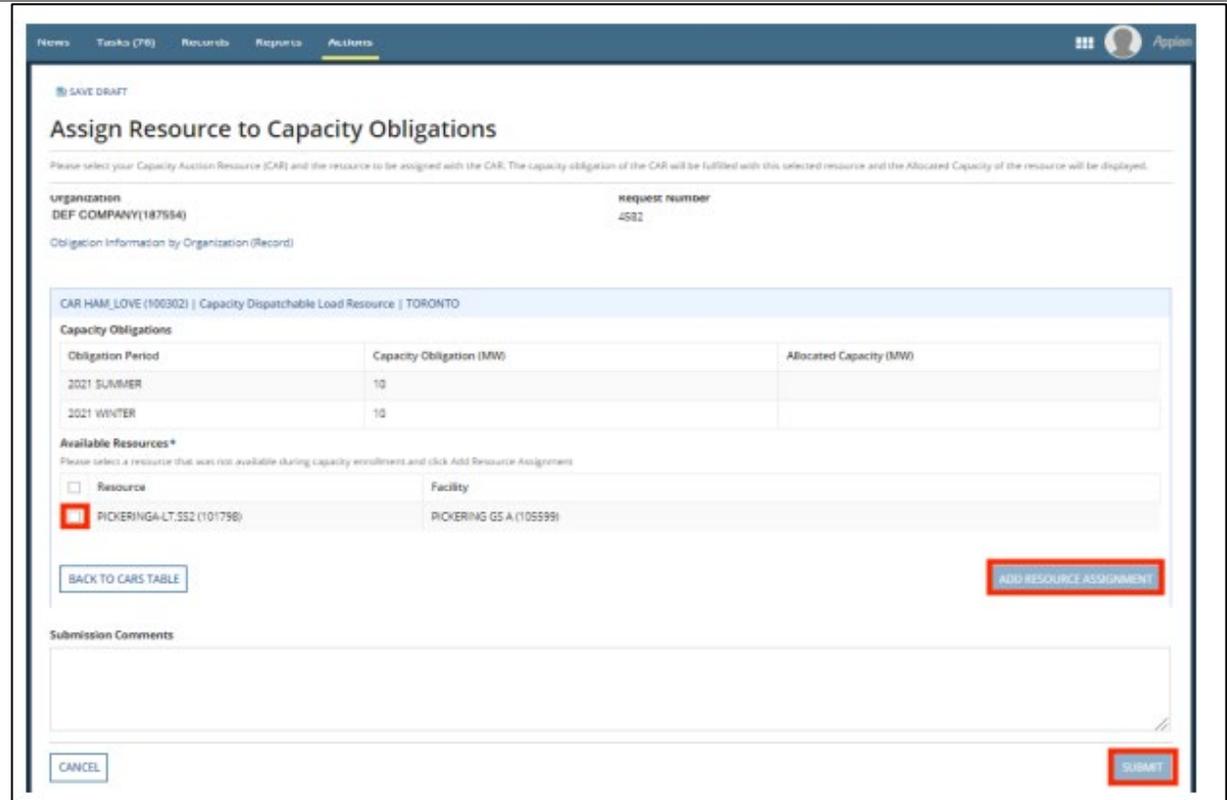
Choose the desired capacity obligation and click **Assign Resource**.



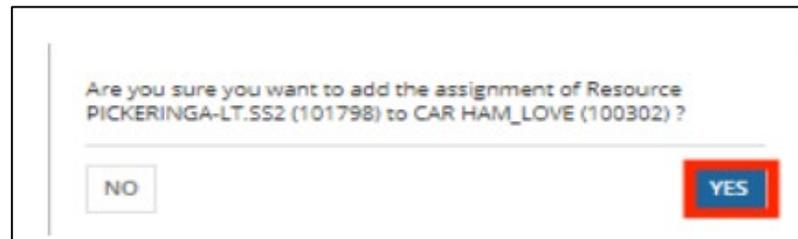
Step Instruction

Picture

- 5 Your available resources will be shown.
Select one resource that will satisfy the capacity obligation and click **Add Resource Assignment**.
Click **Submit** at the bottom of the page.



- 6 From the pop-out box, click **Yes** to confirm the assignment.



Step Instruction

Picture

7 Upon approval, you will receive an email from the IESO summarizing the resource assignment.

- This is an automated message: Do not reply to this Email Address -

The IESO has approved the capacity obligation physical resource assignment for DEF COMPANY. as part of Request #4584

CAR Name	CAR TYPE	Resource	Zone	Obligation Id	Obligation Period	Capacity Obligation (MW)	Allocated Capacity (MW)
HAM_LOVE (100302)	Capacity Dispatchable Load Resource	PICKERINGA-LT.SS2 (101798)	TORONTO	1075	2021 SUMMER	10 MW	0 MW ⚠
				1076	2021 WINTER	10 MW	0 MW ⚠

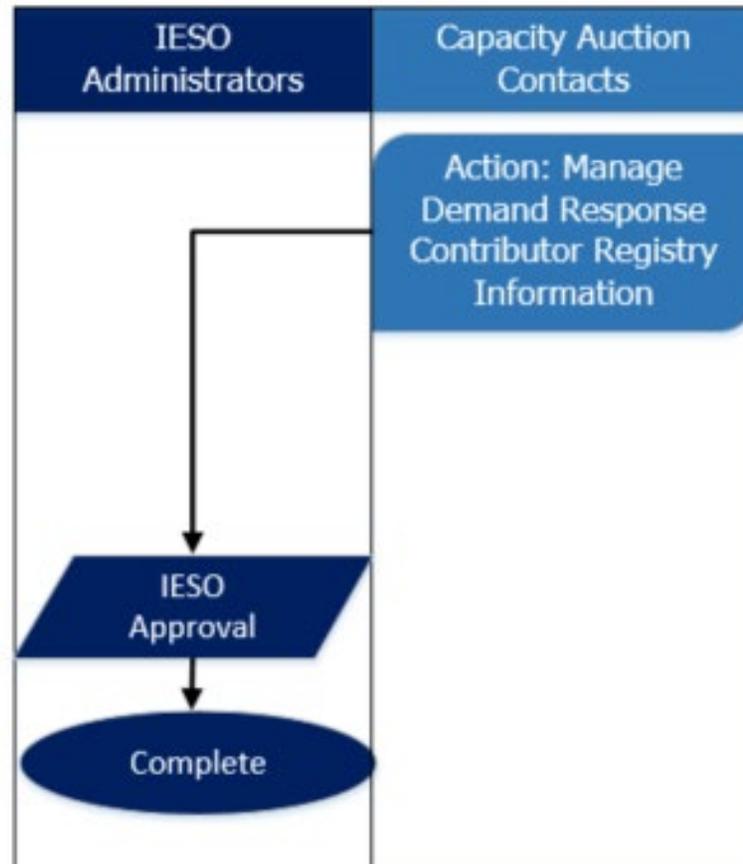
⚠ Please note that the resource capability is lower than the capacity obligation.

Sincerely,
IESO

To
IESO Enrolment Specialist

8. How to Manage Contributors for Virtual HDR Resources

The following table provides step-by-step instructions, with accompanying screen captures, describing how to manage contributors using the Online IESO web-based registration system.



Step Instruction

Picture

1 Action: Manage Demand Response Contributor Management Registry

Log in to the Online IESO web-based registration system using this [link](#).

Enter your Username and Password, and click **Sign In**.



2 Click **Actions** on the menu bar at the top of the screen.

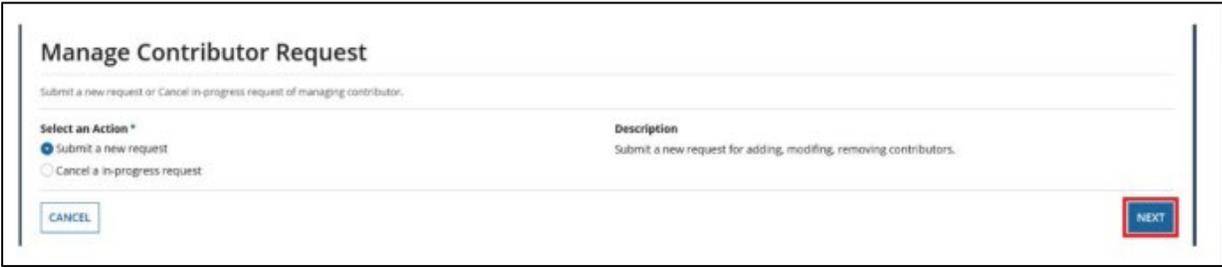
Select **Manage Demand Response Contributor Registry Information** from the list of available action items displayed on the subsequent screen.

Note: This allows you to:

- Register new Virtual or Physical contributors to a Demand Response Resource.

Modify or remove Virtual or Physical contributors associated to a Demand Response Resource.



Step	Instruction	Picture
3	Select the organization you will be representing while completing this action, and click Next .	
4	<p>If your organization already has a request open under another resource, then the Manage Contributor Request screen is displayed, giving the option to submit a new request or to cancel an in-progress request. Choose "Submit a new request", and click Next.</p> <p>Note: It is possible to cancel the request, provided that the request has not passed final approval.</p>	
5	On the following screen, select a Demand Response Resource from the drop-down list.	

Step Instruction

Picture

6 (C&I) Commercial and Institutional (C&I) Resources

The screen is populated with registration data for the selected resource.

Click Add Virtual Contributor or Add Physical Contributor (based on your requirements).

Contributor Management - 187565 - EAST - Auction - C&I

Request Information

Request Number	20679	Resource Id	187565
Organization Name	ENERGY ABC	Resource Name	LENNOX-LT.ENERGYABC_ORA

Timelines for Request

Proposed Effective Date	June 1, 2020	Business Days Left to Submit a Completed Request	3
Request Submission Deadline	May 11, 2020		

Select Demand Response Resource *

187565 - EAST - Auction - C&I

Resource Capacity

Capacity Obligation (MW)	12	Total Contributors Capacity (MW)	0.000
Obligation Period	2020 - Summer	Commitment Capacity (MW)	0

+ ADD VIRTUAL CONTRIBUTOR

+ ADD PHYSICAL CONTRIBUTOR

BACK SUBMIT

Step Instruction

Picture

7 (C&I) For virtual contributors, provide details for each contributor using the form (an asterisk indicates a mandatory item), and click **Save Contributor** to create a virtual contributor.

Design Updates: The requirement to submit a record of installation (ROI) has been removed. CMPs will now be required to submit a copy of an LDC Statement (issued within three months of the contributor effective date) with each metering installation

'Premise ID' field is removed

'Data Acquisition Method' extended to include 'other'

SLD only required if the Demand Response type is selected as Behind the Meter Generation

Add New Virtual Contributor

Request Information

Request Number: 20679
Organization Name: ENERGY ABC
Resource Id: 187565
Resource Name: LENNOX-LT.ENERGYABC_DRA

Contributor Information

Name *: Test1
Address *: 123 street west
Format: Street, City, ON, Postal Code
Load Class Type *: Industrial
Demand Response Type *: Behind the Meter Generation (BAG)
Data Acquisition Method *: LDC Provided
Auction Capacity (MW) *: 4
Format: #.### numerical value. Requirement is 3 decimal places.

LDC Statement

An LDC Statement is required for each metering installation that is associated with the LDC account number indicated in the Contributor details.

Number of Meter Installations *: 1

LDC Statement ID	LDC Statement File	Description
188186	LENNOX-LT.ENERGYABC_DRA_LDC_188186_20200507_v1	LDC attached X

Single Line Diagram

An SLD submission is required when the Contributor Demand Response type is declared as Behind the Meter Generator.

SLD ID	SLD File	Description
188187	LENNOX-LT.ENERGYABC_DRA_SLD_188187_20200507_v1	SLD attached X

SAVE CONTRIBUTOR

Step Instruction

Picture

8 (C&I) For physical contributors, provide details for each contributor using the form (a red asterisk indicates a mandatory item).

If the resource ID type is invalid, the system will check and return the following error message:

“Error: NDL Resource ID not available where one or more parameters are not valid: (1) NDL Resource ID has already been registered as a physical contributor (2) Associated NDL metering installation active for less than two months. (3) Resource ID not fully registered as an NDL.”

Click **Save** to add a physical Contributor.

Add New Physical Contributor

Request Information

Request Number 20679	Resource Id 187565
Organization Name ENERGY ABC	Resource Name LENNOX-LT.ENERGYABC_DRA

Contributor Details

Name
Test2 (physical)

NDL Resource Id *
123456

NDL Resource Capacity (MW) *
8

Comments *
Allocated 8 MWs to physical Contributor

CANCEL **SAVE**

Step Instruction

Picture

9 (C&I) Upon completing the forms, you can view added contributor(s) on the **Contributor Management** screen in the **New Contributors Added** section, and then click Submit.

Finally, on the Submit Request – Confirmation screen, select Click Here to Finish Submission.

Contributor Management - 187565 - EAST - Auction - C&I

Request Information

Request Number 20679	Resource Id 187565
Organization Name ENERGY ABC	Resource Name LENNOX-CT.ENERGYABC_DRA

Timelines for Request

Proposed Effective Date June 1, 2020	Business Days Left to Submit a Completed Request 1
Request Submission Deadline May 11, 2020	

Selected Demand Response Resource

187565 - EAST - Auction - C&I

Resource Capacity

Capacity Obligation (MW) 12	Total Contributors Capacity (MW) ④ 12,000
Obligation Period ④ 2020 - Summer	Commitment Capacity (MW) 12,000

+ ADD VIRTUAL CONTRIBUTOR + ADD PHYSICAL CONTRIBUTOR

New Contributors Added

Id	Name	Type	Auction Capacity (MW)	Status	NDL Status	DELETE
188190	Test2 (physical)	PHYSICAL	8	PENDING	PENDING	X
188188	Test1	VIRTUAL	4	PENDING		X

BACK SUBMIT

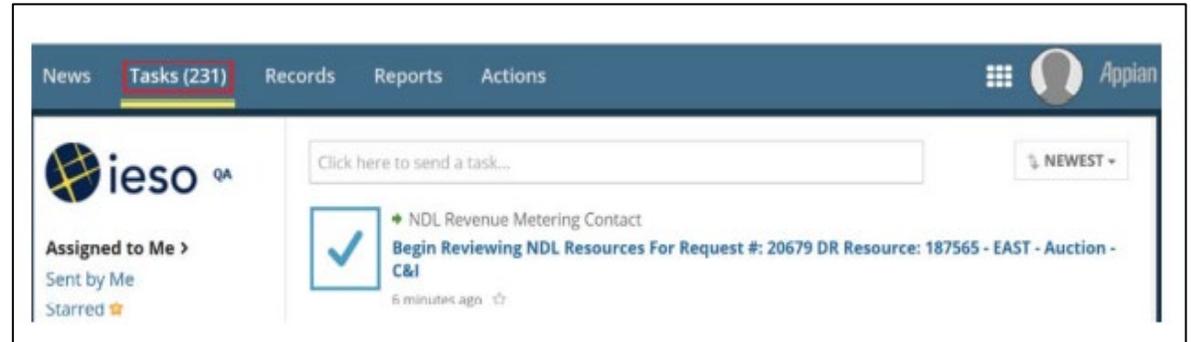
Step Instruction

Picture

10 (C&I) Once the request has been submitted by the CMP, Online IESO will generate a separate task for the Non - Dispatchable Load (NDL) **Revenue Metering Contact** to approve the capacity allocated to the physical contributor.

The NDL Revenue Metering Contact must log in to the Online IESO web - based registration system in order to approve the request.

Click **Tasks** on the menu bar at the top of the screen and select **Begin Reviewing NDL Resources** from the list of tasks. Once selected, the NDL Revenue Metering Contact must first **Accept** the task before completing it. Under **Submitted Contributors**, click on the **Contributor ID** to see contributor details.



Step Instruction

Picture

11 (C&I) Next, review **Contributor Details**, update comments as needed, and click **Approve**. On the main screen, click **Submit**.

Review NDL Resource Contributors

Request Information

Request Number: 20679
Organization Name: ENERGY ABC
Resource Id: 187565
Resource Name: LENNOX-LT.ENERGYABC_DRA

Contributor Details

Name: Test2 (physical)
NDL Resource Id: 123456
NDL Resource Capacity (MW): 8

Comments: Approved

Comments History: Amy Drap - 5/11/2020 2:30 PM EST: Allocated 8 MWs to physical Contributor

BACK APPROVE REJECT

Review NDL Resource Contributors - 187565 - EAST - Auction - C&I

Request Information

Request Number: 20679
Organization Name: ENERGY ABC
Resource Id: 187565
Resource Name: LENNOX-LT.ENERGYABC_DRA

Timelines for Request

Proposed Effective Date: June 1, 2020
Request Submission Deadline: May 11, 2020
Business Days Left to Submit a Completed Request: 1

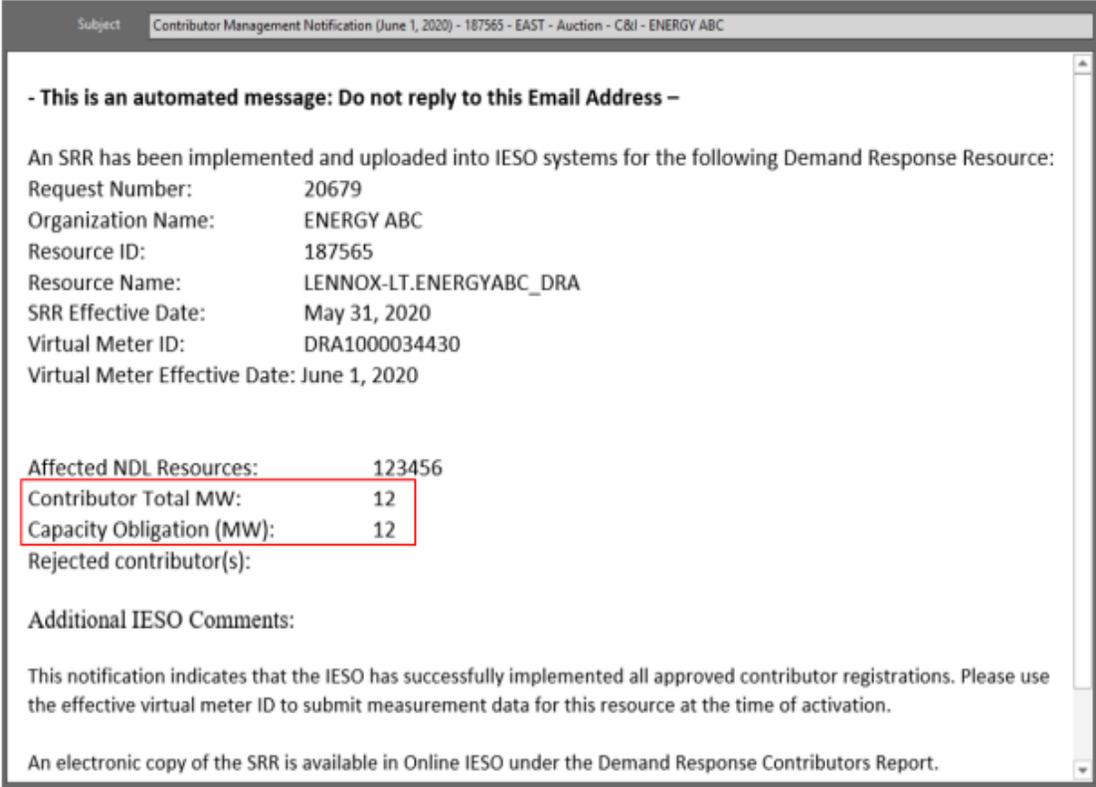
Submitted Contributors

Select id to review or modify contributor.

Id	Name	NDL Resource ID	NDL Status	Action	Capacity (MW)
188190	Test2 (physical)	123456	APPROVED	ADD	8

SUBMIT

Step	Instruction	Picture
12 (C&I)	Finally, at the Review NDL Resource – Confirmation screen select Click Here to Finish Review .	

13 (C&I)	<p>Scenario #1 – IESO Approves a Contributor Request</p> <p>Once the IESO has reviewed and approved all contributor registrations within a request, an email notification is sent to the CMP’s Contributor Information Contact (CIC) summarizing the registration details.</p>	
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Step Instruction

Picture

14 (C&I) Scenario #2 – IESO Rejects a Contributor Request

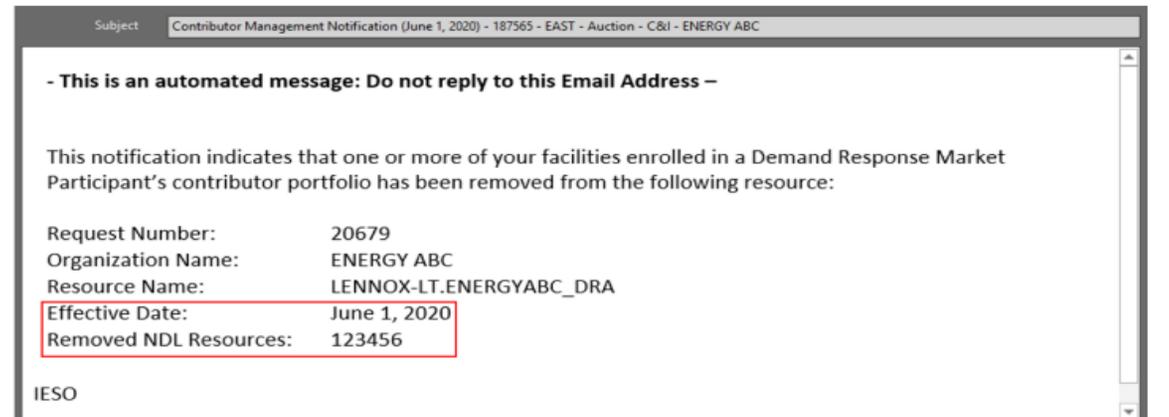
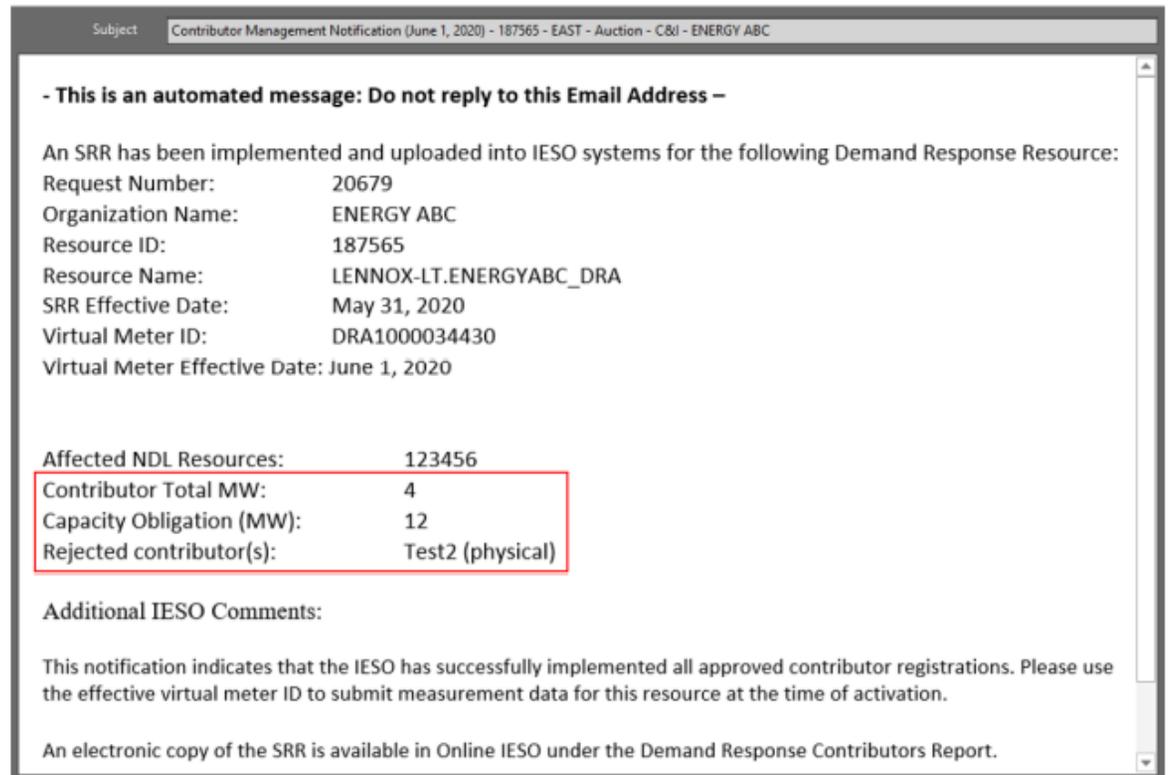
Monthly Contributor Management Registrations will be processed by “individual contributors” and not by “monthly task”

Registration requests will move forward with the contributors that have been approved.

CMPs will be notified of all Rejected Contributors via email notification.

If a physical contributor has been rejected by the IESO or removed by the CMP, the NDL Revenue Metering Contact of the physical load will receive a separate email notification indicating the removal of their facility from the Demand Response Resource.

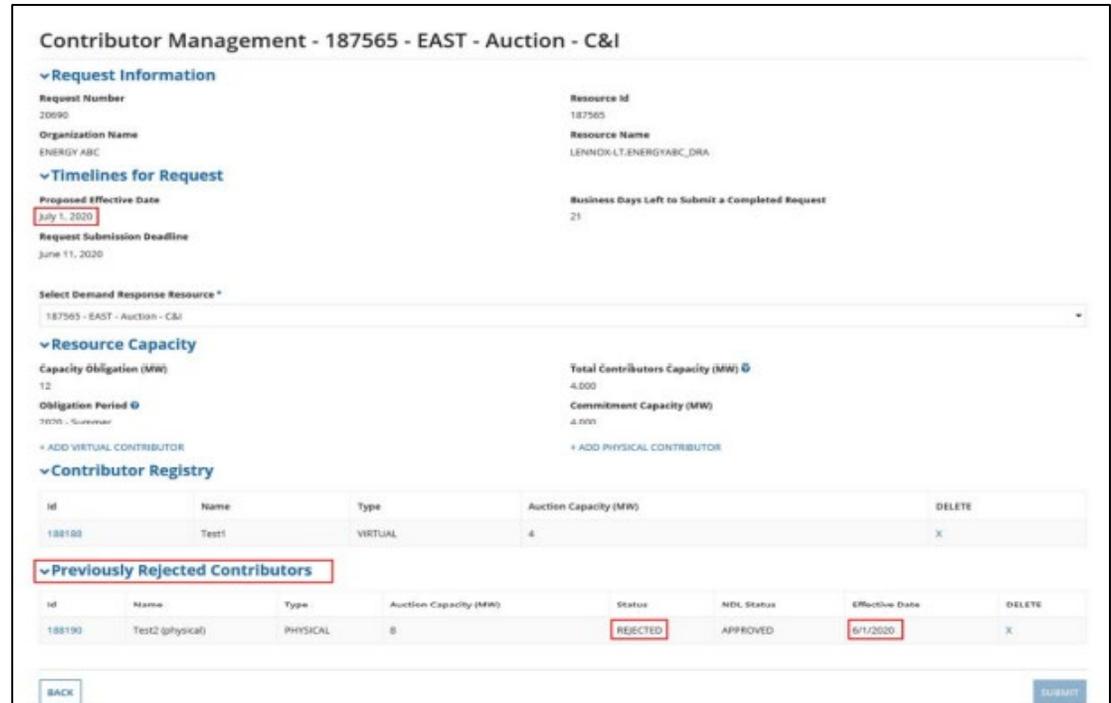
The Online IESO contributor management process has been modified to eliminate the need for NDL Approval before removing physical contributors.



Step Instruction

Picture

15 (C&I) The Online IESO system will save the Rejected Contributors registration information and present it to the user (CMP) for the subsequent month's registration with a **Rejected** status.



16 (C&I) Click **Reports** on the menu bar at the top of the screen, and select **Demand Response – Contributors Report** to view the **Registered Active Contributors** list for each zone/Demand Response Resource by month. You can view your **Site Registration Report (SRR)** by clicking the hyperlinks at the bottom of the screen.



Step Instruction

Picture

Select Export Results to Excel to export the Contributors Report to Excel.
 The **Contributors Report** is now available for download as an Excel workbook.

Demand Response - Contributors Report

Select Year: 2020 | Select Report Month: June

[Export Contributor data to Excel](#)

ENERGY ABC - Contributor Registry as of June, 01, 2020

Contributor ID	Zone	Registered Contributor Name	Contributor MW's	Resource ID	NDL Resource ID	Virtual Meter Point ID	Contributor Type	LDC Name	LDC Account #	DR Type	Data Acquisition Method	Effective Date	Record End Date
188188	EAST	Test1	4.000	187565		DRA1000034630	VIRTUAL	ALECTRA	111111111	BMG	LDC Provided	6/1/2020	12/31/5000
188190	EAST	Test2 (physical)	8.000	123456			PHYSICAL					6/1/2020	12/31/5000

Zone Totals as of June, 01, 2020

Zone	Total Contributor MW's	Obligation MW's
EAST	12.000	12.000
ZONE TOTAL	12.000	12.000

ENERGY ABC - DR Resource Active SRR's as of June, 01, 2020

Resource Id	Zone	SRR File	SRR Effective Date	SRR End Date
187565	EAST	LENNOX-LT.ENERGYABC_DRA_SRR_187565_20200601_v1	6/1/2020	12/31/5000

Active Residential Contributor Document's are NOT found for June, 01, 2020

Step Instruction

Picture

17 Residential Resources
(Res) The **Contributor Management** screen is populated with registration data for the selected resource.
Click Add Monthly Residential Contributor Group.

Contributor Management - 187536 - SOUTHWEST - Auction - Residential

Request Information

Request Number 19351	Resource Id 187536
Organization Name PWRN LP	Resource Name MIDDLEPORT-LT.PWRNLP_DRA

Timelines for Request

Proposed Effective Date October 1, 2019	Business Days Left to Submit a Completed Request 15
Request Submission Deadline September 11, 2019	

Selected Demand Response Resource

187536 - SOUTHWEST - Auction - Residential

Resource Capacity

Capacity Obligation (MW) 30	Total Contributors Capacity (MW) ⓘ 0.000
Obligation Period ⓘ 2019 - Summer	Commitment Capacity (MW) 0

+ ADD MONTHLY RESIDENTIAL CONTRIBUTOR GROUP

To be Removed Contributors

Id	Name	Type	Auction Capacity (MW)	Status	# of Control Contributors	# of Treatment Contributors	DELETE
187543	MIDDLEPORT-LT.PWRNLP_DRA	RESIDENTIAL	20	PENDING	350	2	X

BACK SUBMIT

Step Instruction

Picture

18 Enter **Contributor Details**, and upload the Contributor list file.
(Res) Click **Save** to create the new Residential Contributor

Contributor list format:

A	B	C	D
Contributor Address	LDC Name	LDC Account#	Control Group Flag (Y/N)

Step Instruction

Picture

19 (Res) Upon completing the forms, you can view added contributor(s) on the **Contributor Management** screen in the **New Contributors Added** section.

Click **Submit**, and complete the submission by selecting **Click Here to Finish Submission**.

Contributor Management - 187536 - SOUTHWEST - Auction - Residential

Request Information

Request Number: 19351	Resource Id: 187536
Organization Name: FWRN LP	Resource Name: MIDDLEPORT-LT.FWRNLP_DRA

Timelines for Request

Proposed Effective Date: October 1, 2019	Business Days Left to Submit a Completed Request: 15
Request Submission Deadline: September 11, 2019	

Selected Demand Response Resource

187536 - SOUTHWEST - Auction - Residential

Resource Capacity

Capacity Obligation (MW): 30	Total Contributors Capacity (MW): 30,000
Obligation Period: 2019 - Summer	Commitment Capacity (MW): 0

New Contributors Added

Id	Name	Type	Auction Capacity (MW)	Status	# of Control Contributors	# of Treatment Contributors	DELETE
187651	MIDDLEPORT-LT.FWRNLP_DRA	RESIDENTIAL	30	PENDING	400	200	X

To be Removed Contributors

Id	Name	Type	Auction Capacity (MW)	Status	# of Control Contributors	# of Treatment Contributors	DELETE
187543	MIDDLEPORT-LT.FWRNLP_DRA	RESIDENTIAL	20	PENDING	350	2	X

BACK SUBMIT

Submit Request - Confirmation

Request Information

Request Number: 19351	Resource Id: 187536
Organization Name: FWRN LP	Resource Name: MIDDLEPORT-LT.FWRNLP_DRA
Contributor Effective Month: October, 2019	

Request has been submitted successfully

CLICK HERE TO FINISH SUBMISSION

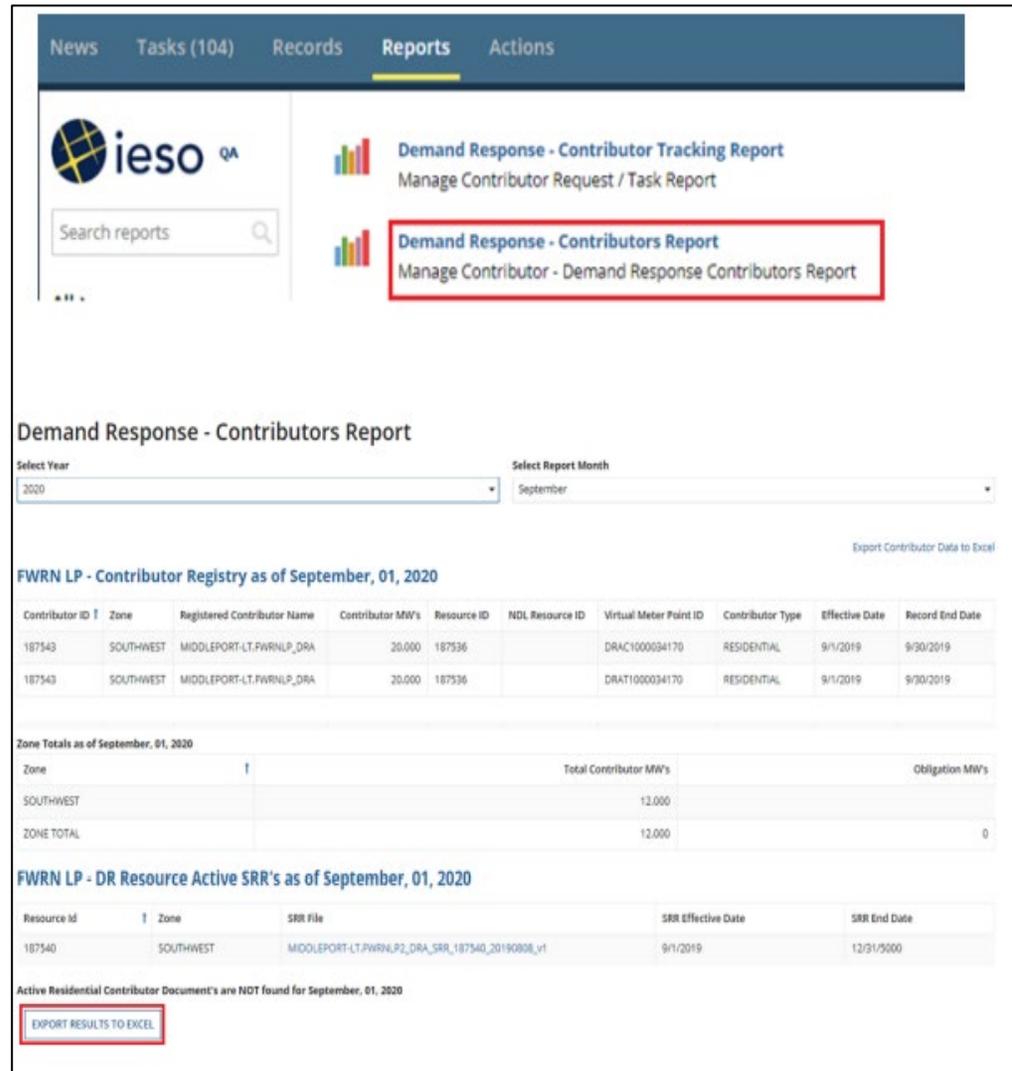
Step	Instruction	Picture
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20 (Res)	An email notification is sent after the IESO has approved the submission.	N/A
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21 (Res)	Click Reports on the menu bar at the top of the screen, and select Demand Response – Contributors Report to view the registered active contributors list for each zone/Demand Response Resource by month.	
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Select **Export Results to Excel** to export the **Contributors Report** to Excel.

The **Contributors Report** is now available for download as an Excel workbook.



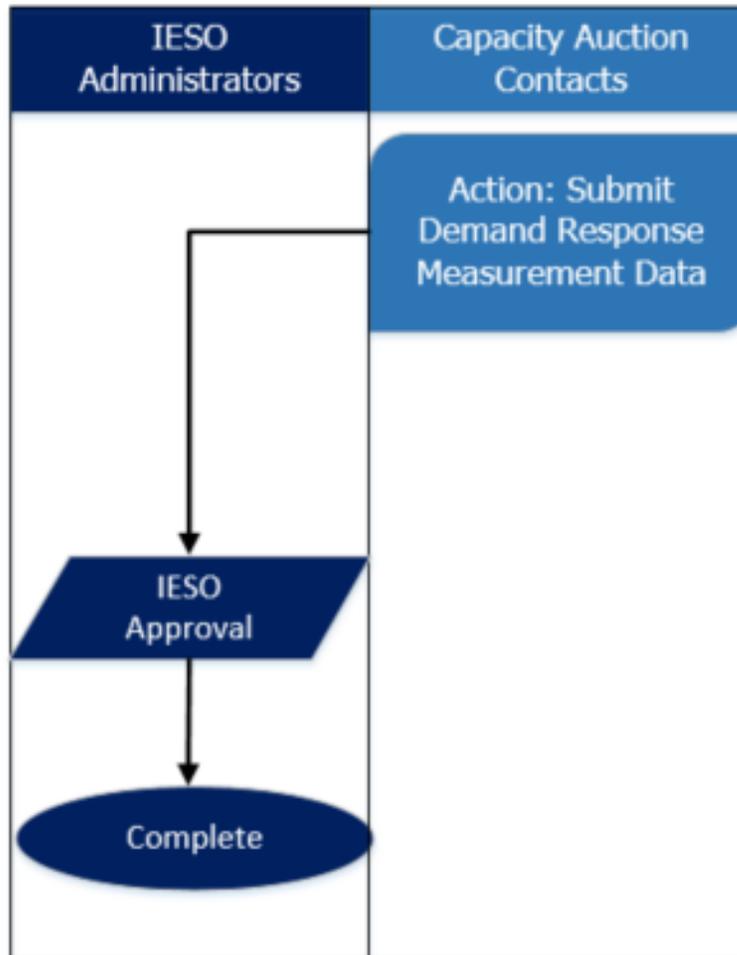
Step Instruction**Picture**

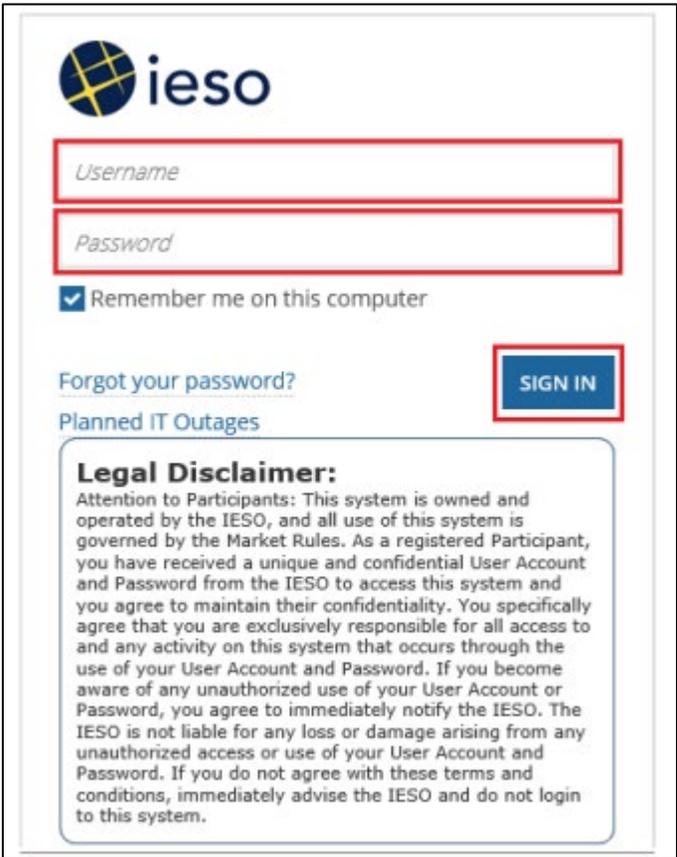
22 Select the desired Residential Contributor File, and use the pop-up on the screen to download the file.
(Res)

Resource Id	Zone	Residential Contributor File	Effective Date	End Date
143357	WEST	CHATHAM.LT.ENERGY-ABC_DRA_RES_143394_20170501_v1	5/1/2017	5/31/2017

9. How to Submit Demand Response Measurement Data

The following table provides step-by-step instructions, with accompanying screen captures, describing how to submit demand response measurement data using the Online IESO web-based registration system.



Step	Instruction	Picture
1	<p data-bbox="331 215 751 285">Action: Submit Demand Response Measurement Data</p> <p data-bbox="331 305 737 410">Log in to the Online IESO web-based registration system using this link.</p> <p data-bbox="331 430 716 500">Enter your Username and Password, and click Sign In.</p>	

Step	Instruction	Picture
------	-------------	---------

2 Click **Actions** on the menu bar at the top of the screen.

Select **Submit Demand Response Measurement Data** from the list of available action items displayed on the subsequent screen.

Note: This allows you to submit Virtual Measurement data with a virtual meter point ID associated to a Demand Response Resource

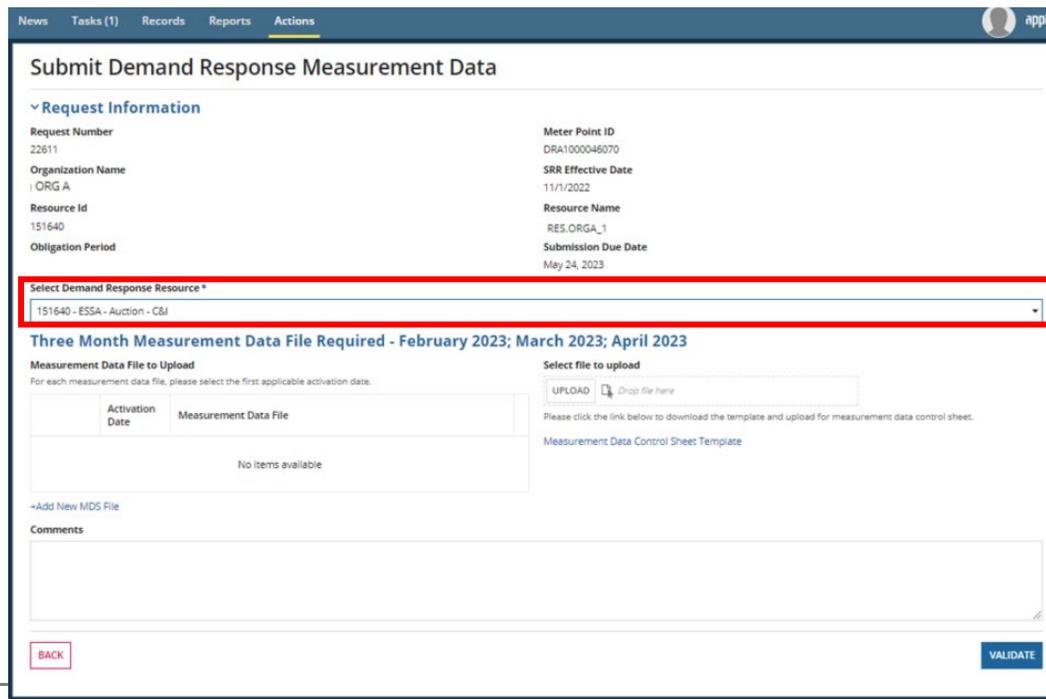


3 Select a **Demand Response Resource** from the drop-down list. The page will expand as shown.

Note:

1. Measurement Data Control Sheet Template is available to download in the task
2. Measurement Data Submissions will be required based on Activation
3. Each submission will require a Measurement Data File based on the months indicated

Multiple measurement data files can be uploaded to



Step	Instruction	Picture
------	-------------	---------

support contributor outage management.

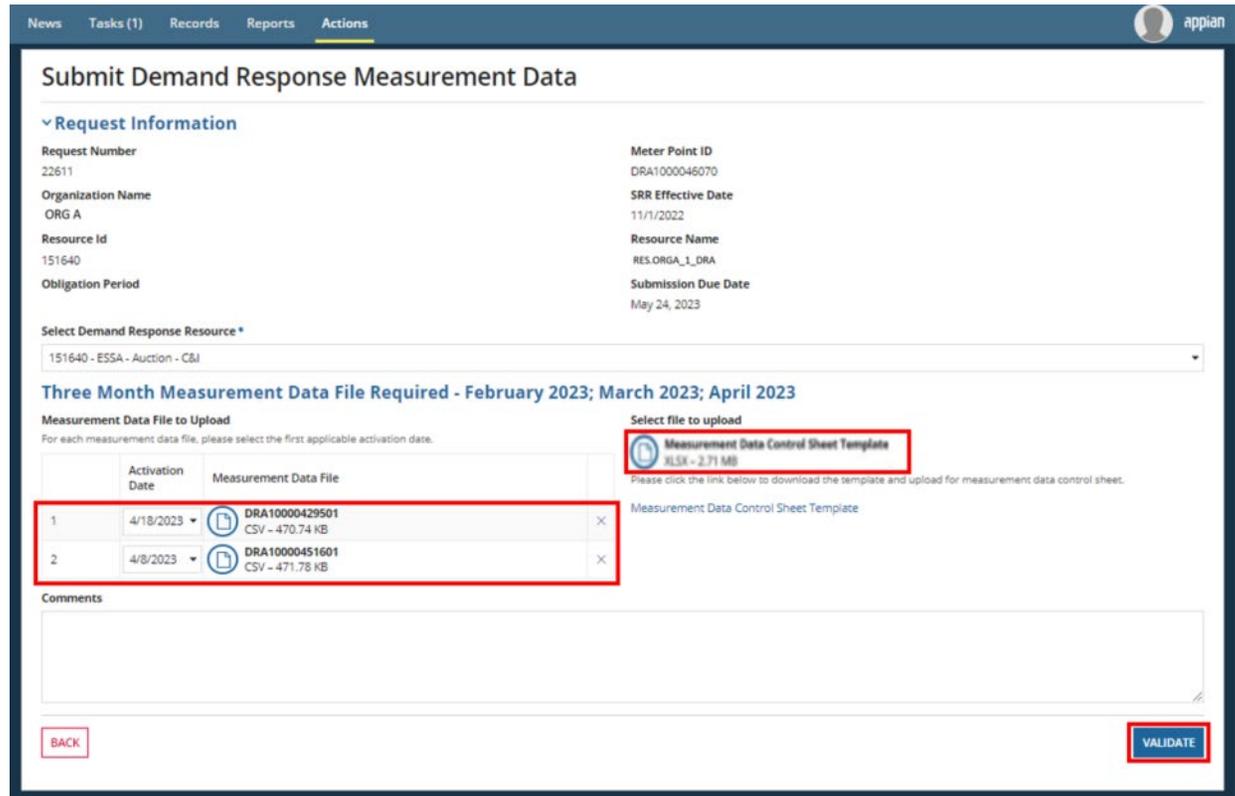
Note: The system will indicate the data required in the measurement submission (i.e., months of interest).

4 The screen is populated with registration data for the selected resource.

Click **Upload** to locate and upload multiple measurement data files (in CSV format only). You are required to select the applicable activation date for each measurement data file.

If more than one activation date is applicable to a file, specify all the activation dates in the comment box.

Once uploaded, click **Validate**.



Step	Instruction	Picture								
5 (C&I)	<p>Example of a Failed Validation</p> <p>The screen is populated with results when the validation process is complete. The validation will check:</p> <ol style="list-style-type: none"> 1. That the files formats meets requirements; 2. The required months of data is submitted. <p>Specific errors will be identified if the data does not pass validation.</p> <p>In this example, the number of records did not match what was expected (i.e., uploaded the wrong month).</p>	<p>Validate and Confirm Measurement Data For 187565 - LENNOX-LT.ENERGYABC_DRA</p> <p>Request Information</p> <table border="0"> <tr> <td>Request Number 20697</td> <td>Meter Point ID DRA1000034430</td> </tr> <tr> <td>Organization Name ENERGY ABC</td> <td>SRR Effective Date 6/1/2020</td> </tr> <tr> <td>Resource ID 187565</td> <td>Resource Name LENNOX-LT.ENERGYABC_DRA</td> </tr> <tr> <td>Obligation Period 2020 - Summer</td> <td>Submission Due Date July 24, 2020</td> </tr> </table> <p>Validation Details</p> <p>Uploaded Measurement Data File 3MonthFile_April_May_June_2020.xlsx</p> <p>Uploaded Measurement Data Control Sheet File Measurement Data Control Sheet Template.xlsx</p> <p>Failed Validation</p> <p>Three Month Measurement Data File Required - April 2020; May 2020; June 2020</p> <p>The number of records in uploaded file does not match the expected records</p> <p>Required Number of Records: 25920 Number of Records in Uploaded File: 121</p> <p>Select revised file to upload *</p> <p>UPLOAD <input type="text" value="Click for help"/></p> <p>Select revised control sheet file to upload</p> <p>UPLOAD <input type="text" value="Click for help"/></p> <p>CANCEL VALIDATE SUBMIT</p>	Request Number 20697	Meter Point ID DRA1000034430	Organization Name ENERGY ABC	SRR Effective Date 6/1/2020	Resource ID 187565	Resource Name LENNOX-LT.ENERGYABC_DRA	Obligation Period 2020 - Summer	Submission Due Date July 24, 2020
Request Number 20697	Meter Point ID DRA1000034430									
Organization Name ENERGY ABC	SRR Effective Date 6/1/2020									
Resource ID 187565	Resource Name LENNOX-LT.ENERGYABC_DRA									
Obligation Period 2020 - Summer	Submission Due Date July 24, 2020									

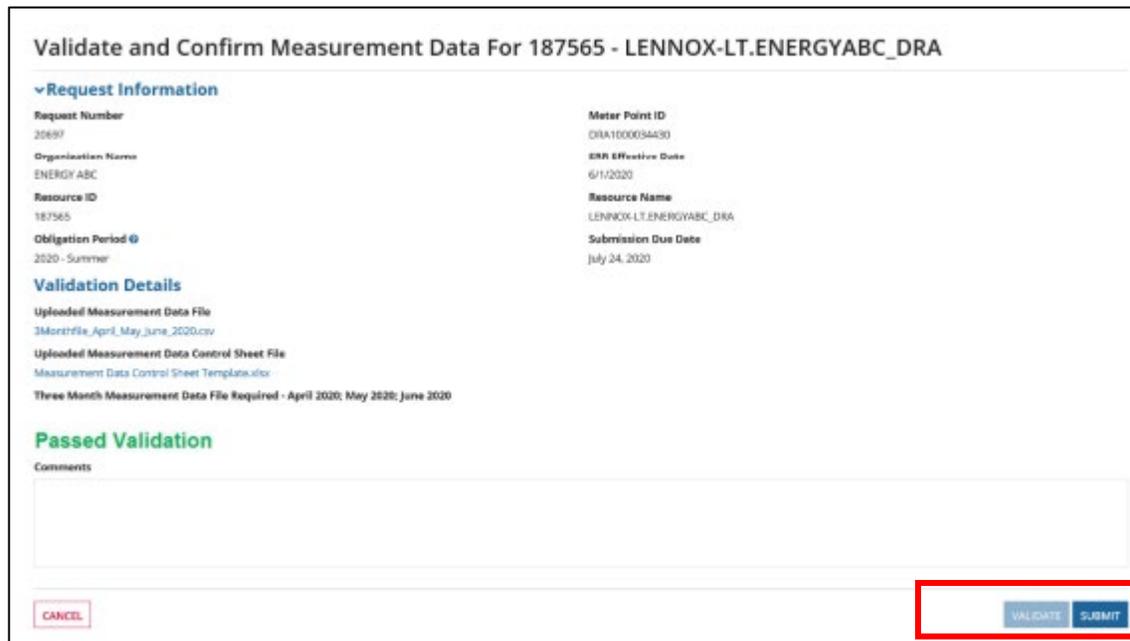
Step	Instruction	Picture
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6
(C&I)

Example of a Passed Validation
The screen is populated with the results when the validation process is complete. Click **Next MSD File to Validate**. The same validation process will be done for the second file.

Important Note: The process of completing the validation for the three -month file can take up to one minute because of the number of records.

Do not navigate away from the screen during this time.



7
(C&I)

A confirmation page is displayed after the files has been successfully validated.

Click **Finish** to complete the process.

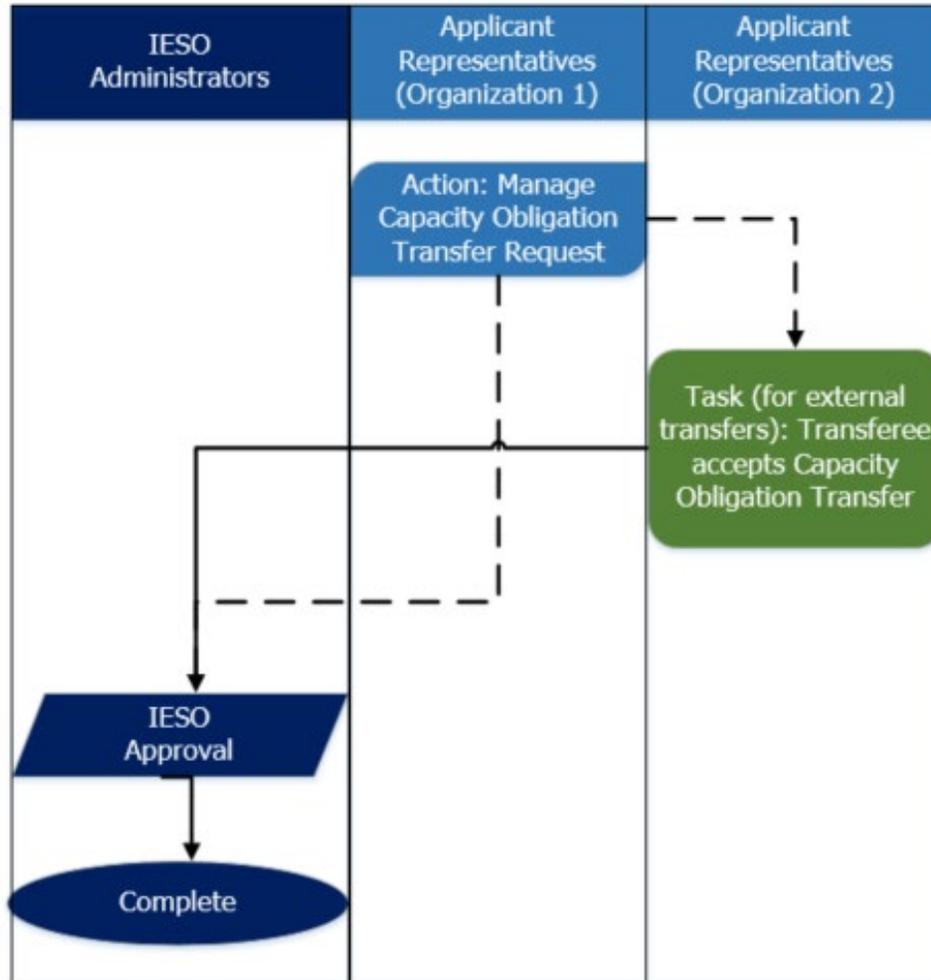


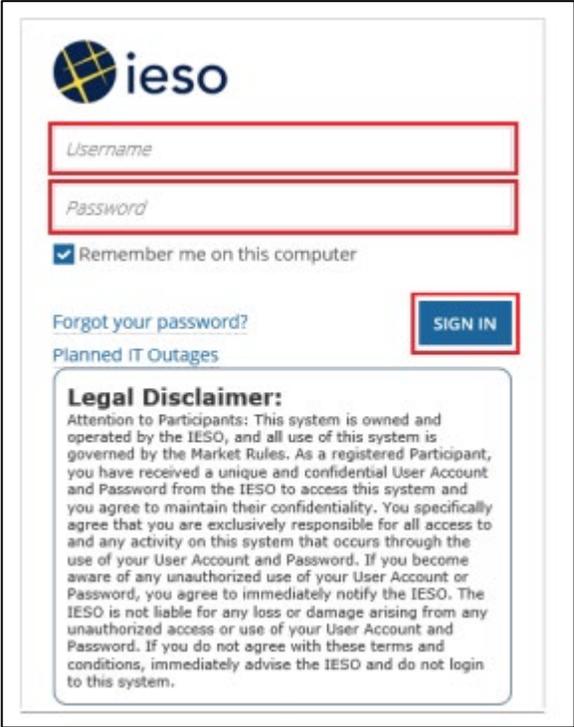
Step	Instruction	Picture																		
8 (C&I)	An email notification is sent after the IESO has implemented and approved the measurement data submission	 <p>The screenshot shows an email interface with a subject line: "Measurement Data Submission Notification (June 2020) - 187565 - ENERGY ABC". The body of the email contains the following text:</p> <p>- This is an automated message: Do not reply to this Email Address -</p> <p>A Measurement Data File has been received, reviewed, approved and uploaded into IESO systems for the following Demand Response resource:</p> <table border="0"> <tr> <td>Request Number:</td> <td>20679</td> </tr> <tr> <td>Organization Name:</td> <td>ENERGY ABC</td> </tr> <tr> <td>Resource ID:</td> <td>187565</td> </tr> <tr> <td>Resource Name:</td> <td>LENNOX-LT.ENERGYABC_DRA</td> </tr> <tr> <td>Effective Submission Month:</td> <td>June 2020</td> </tr> <tr> <td>Submitted File Name:</td> <td>3Monthfile_April_May_June_2020</td> </tr> <tr> <td>Submission Date:</td> <td>July 24, 2020</td> </tr> <tr> <td>Virtual Meter ID:</td> <td>DRA1000034430</td> </tr> <tr> <td>Measurement Data Coverage:</td> <td>April 2020; May 2020; June 2020</td> </tr> </table> <p>This notification indicates IESO has successfully received measurement data submissions.</p> <p>IESO</p>	Request Number:	20679	Organization Name:	ENERGY ABC	Resource ID:	187565	Resource Name:	LENNOX-LT.ENERGYABC_DRA	Effective Submission Month:	June 2020	Submitted File Name:	3Monthfile_April_May_June_2020	Submission Date:	July 24, 2020	Virtual Meter ID:	DRA1000034430	Measurement Data Coverage:	April 2020; May 2020; June 2020
Request Number:	20679																			
Organization Name:	ENERGY ABC																			
Resource ID:	187565																			
Resource Name:	LENNOX-LT.ENERGYABC_DRA																			
Effective Submission Month:	June 2020																			
Submitted File Name:	3Monthfile_April_May_June_2020																			
Submission Date:	July 24, 2020																			
Virtual Meter ID:	DRA1000034430																			
Measurement Data Coverage:	April 2020; May 2020; June 2020																			

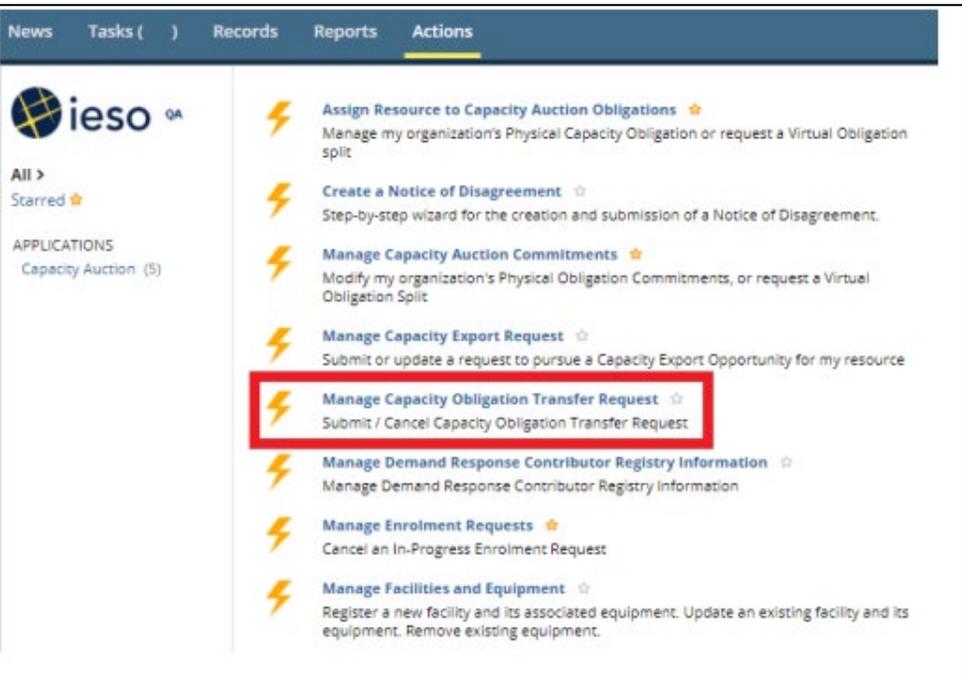
Step	Instruction	Picture																										
9 (C&I)	<p>To view measurement submissions for each zone/DR resource by month, select Demand Response - Measurement Data Submission Report in the Reports tab.</p> <p>Note: You can view all the details of your submissions for any previous month.</p> <p>Select Export Results to Excel to export the Measurement Data Submission Report to Excel.</p>	<p>Demand Response - Measurement Data Submission Report</p> <p>Report Filters:</p> <p>Submission Year: 2020 DRMP Name: ENERGY ABC Effective Submission Month: June</p> <p><small>*Note: "Obligation Period" refers to each of the two six-month seasonal periods, the same as seasonal commitment period defined in the Demand Response Auction. In the Capacity Auction, the term "Commitment Period" refers to the entire length of time (i.e. 1 year) over which each auction secures capacity.</small></p> <table border="1"> <thead> <tr> <th>DRMP Name</th> <th>Zone Name</th> <th>Resource ID</th> <th>Resource Name</th> <th>Virtual Meter Point ID</th> <th>SRR Effective Date</th> <th>Measurement File Type</th> <th>Final Status</th> <th>Submission Date</th> <th>Re-Submission Date</th> <th>Obligation Id</th> <th>Obligation Period*</th> <th>Effective submission date</th> </tr> </thead> <tbody> <tr> <td>ENERGY ABC</td> <td>C&I</td> <td>187565</td> <td>LENNDX-LT.ENERGYABC_DRA</td> <td>DBA1000034430</td> <td>6/1/2020</td> <td>Three Month</td> <td>Submitted</td> <td>7/24/2020</td> <td></td> <td>0001</td> <td>Summer 2020</td> <td>6/1/2020</td> </tr> </tbody> </table> <p>EXPORT RESULTS TO EXCEL</p>	DRMP Name	Zone Name	Resource ID	Resource Name	Virtual Meter Point ID	SRR Effective Date	Measurement File Type	Final Status	Submission Date	Re-Submission Date	Obligation Id	Obligation Period*	Effective submission date	ENERGY ABC	C&I	187565	LENNDX-LT.ENERGYABC_DRA	DBA1000034430	6/1/2020	Three Month	Submitted	7/24/2020		0001	Summer 2020	6/1/2020
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10. How to Complete a Capacity Obligation Transfer Request

The following chapter provides step-by-step instructions, with accompanying screen captures, describing the process for completing a capacity obligation transfer request using the Online IESO web-based system.

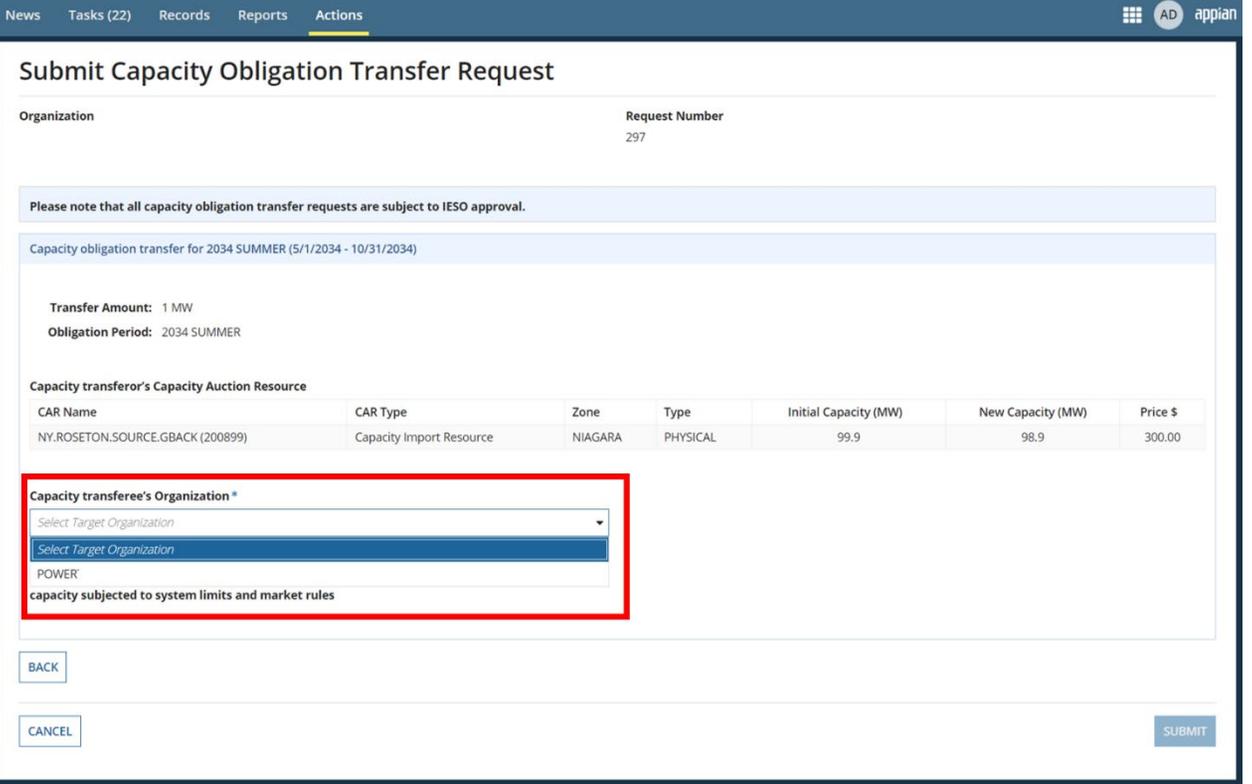


Step	Instruction	Picture
1	<p data-bbox="331 217 751 285">Action: Manage Capacity Obligation Transfer Request</p> <p data-bbox="331 306 716 410">The Capacity Auction Contact is the contact role that can submit a transfer request.</p> <p data-bbox="331 431 735 532">Log in to the Online IESO web-based registration system using this link.</p> <p data-bbox="331 553 701 623">Enter your Username and Password and click Sign In.</p>	

Step	Instruction	Picture
2	<p>Click Actions on the menu bar at the top of the page.</p> <p>Select Manage Capacity Obligation Transfer Request from the list of available action items displayed on the subsequent screen.</p> <p>Note: This action allows you to transfer some or all of a resource’s capacity obligation to another organization, or to another CAR within your own organization.</p>	 <p>The screenshot shows the IESO QA Actions menu. The menu items are:</p> <ul style="list-style-type: none"> Assign Resource to Capacity Auction Obligations Create a Notice of Disagreement Manage Capacity Auction Commitments Manage Capacity Export Request Manage Capacity Obligation Transfer Request (highlighted with a red box) Manage Demand Response Contributor Registry Information Manage Enrolment Requests Manage Facilities and Equipment

Step	Instruction	Picture
3	<p>Select your organization name from the drop-down list and choose whether you wish to Submit or Cancel a capacity obligation transfer request.</p> <p>Click Next.</p> <p>To cancel a transfer request, skip to Step 9.</p>	

Step	Instruction	Picture
4	<p>On the following screen, you will select the applicable obligation period in which you wish to make the transfer request using the drop down list.</p> <p>Note: the transfer can only be made within the same obligation period(i.e. Not between a summer and winter obligation period.)</p> <p>Based on the obligation period that is selected, the applicable Capacity Auction Resource (CAR) data relevant to your organization will be displayed on the screen. As part of this request, you will need to identify:</p> <ul style="list-style-type: none"> • The CAR from which you wish to transfer the obligation from; • The amount of capacity you wish to transfer; • The organization to which you wish to transfer capacity, or if to your own organization, the CAR that will receive the obligation. 	

Step	Instruction	Picture
	<p>Each transfer request can only be submitted for one CAR at a time, and can be accepted by only one CAR.</p> <p>Click Submit.</p>	
5	<p>If the transfer is to another organization, you will need to identify the receiving organization to which the transfer will take place. This can be selected in the Capacity Transferee's Organization drop-down list. If the transfer is to your own organization, proceed to Step 8.</p> <p>Note: Online IESO will only display organizations that are eligible to receive the transfer.</p> <p>Click Submit. A task will be issued to the Capacity Auction Contact of the receiving organization.</p>	
6	<p>Task: Accept Capacity Obligation Transfer</p>	

Step	Instruction	Picture
	<p>As part of accepting the capacity obligation transfer, the receiving organization (Transferee) must identify the CAR that will receive the capacity. Online IESO will limit the receiver to CAR's with the following characteristics:</p> <ul style="list-style-type: none"> • The CAR must have surplus capacity (i.e., qualified capacity not cleared in the auction); • The CAR must be in a zone that's not at its zonal/zonal group limit (i.e. zonal/zonal group limits will not be exceeded as a result of the transfer). <p>Once a CAR has been selected, the Revised Capacity Obligation, Revised Cleared ICAP and Price will be displayed.</p> <p>Note: A revised blended capacity auction clearing price will be determined for transfers between zones with different clearing prices.</p> <p>Click Accept, and the request will go to the IESO for approval.</p>	

Step	Instruction	Picture
	<p>As part of the approval process, the IESO will evaluate whether any additional deposit or prudential amount is required and will coordinate this accordingly. If the receiving organization chooses to reject the transfer request, an email will be sent to the transferor to inform them.</p>	
7	<p>If the receiving organization accepts the capacity using a CAR that is not yet registered, or if they are not a Capacity Market Participant (CMP), they must become a CMP, register the resource and use the Assign Resource to Capacity Obligation action in Online IESO.</p>	<p><See steps for CMP authorization, Register a Resource and Assign Resource to Capacity Obligation></p>

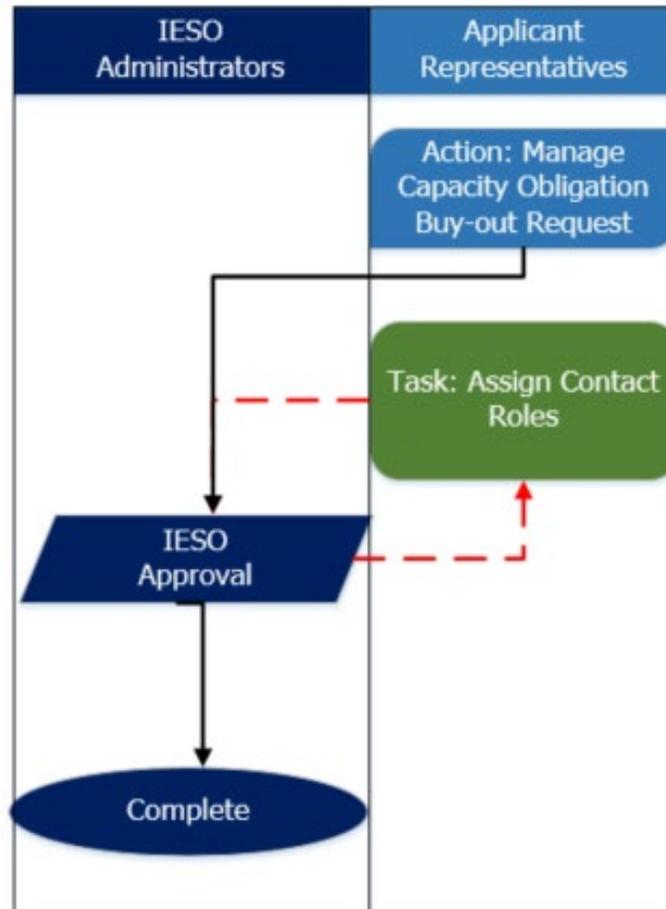
Step	Instruction	Picture
8	<p>If the transfer is to your own organization, the screen will display your available CAR data for the selected obligation period.</p> <p>The upper portion of the table (Capacity transferor's CAR) displays the source obligation information, while the lower portion of the table (Capacity transferee's CAR) displays the destination obligation information.</p> <p>Choose one transferee CAR to receive the transfer. Once a CAR has been selected, the Revised Capacity Obligation, Revised Cleared ICAP and Price will be displayed.</p> <p>Click Submit, and the request will go to the IESO for approval.</p> <p>As part of the approval process, the IESO will evaluate whether any additional deposit or prudential amount is required and will coordinate this accordingly.</p> <p>You can view your transfer request details under the Capacity Obligation Transfer Request record.</p>	<p>The screenshot displays the 'Submit Capacity Obligation Transfer Request' interface. At the top, there are navigation tabs for News, Tasks (25), Records, Reports, and Actions. The main title is 'Submit Capacity Obligation Transfer Request'. Below the title, the Organization is listed as 'FWRN LP (125440)' and the Request Number is '301'. A blue banner states: 'Please note that all capacity obligation transfer requests are subject to IESO approval.' The main content area is titled 'Capacity obligation transfer for 2032 SUMMER (5/1/2032 - 10/31/2032)'. It shows 'Transfer Amount: 1 MW' and 'Obligation Period: 2032 SUMMER'. There are two tables: 'Capacity transferor's Capacity Auction Resource' and 'Capacity transferee's Capacity Auction Resource'. The second table is selected, showing a table with columns: CAR Name, CAR Type, Zone, Type, Capacity Obligation (MW), Surplus Capacity (MW), Revised Capacity Obligation (MW), and Price \$. The selected row is 'BRUCE-LT', Virtual Hourly Demand Response - C&I, BRUCE, VIRTUAL, 47.7, 4.1 - 1 = 3.1, 48.7, 300.00. Below the tables, there is a 'Submission Comments' text area and buttons for 'BACK', 'CANCEL', and 'SUBMIT'.</p>

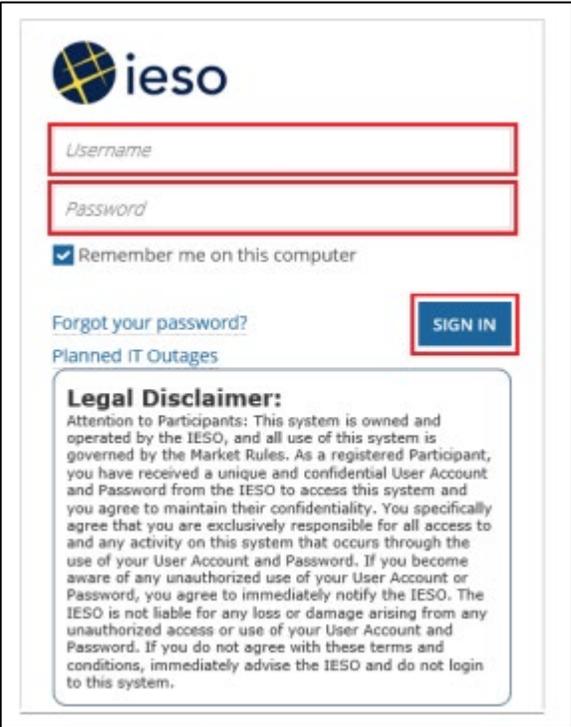
Step	Instruction	Picture
9	<p>If your submitted transfer is to another organization and you wish to cancel, you may do so up to the point the receiving organization processes their task.</p> <p>Note: Once the task is processed by the Transferee, the option to cancel is not available.</p> <p>To cancel, click Actions on the menu bar at the top of the page. Select Manage Capacity Obligation Transfer Request from the list of available action items displayed on the subsequent screen.</p> <p>Choose the request you wish to cancel by selecting the check box, enter the cancellation reason in the field that's provided, and click Submit. If your transfer is to your own organization, there is no option to cancel it in Online IESO after the request has been submitted to the IESO.</p>	

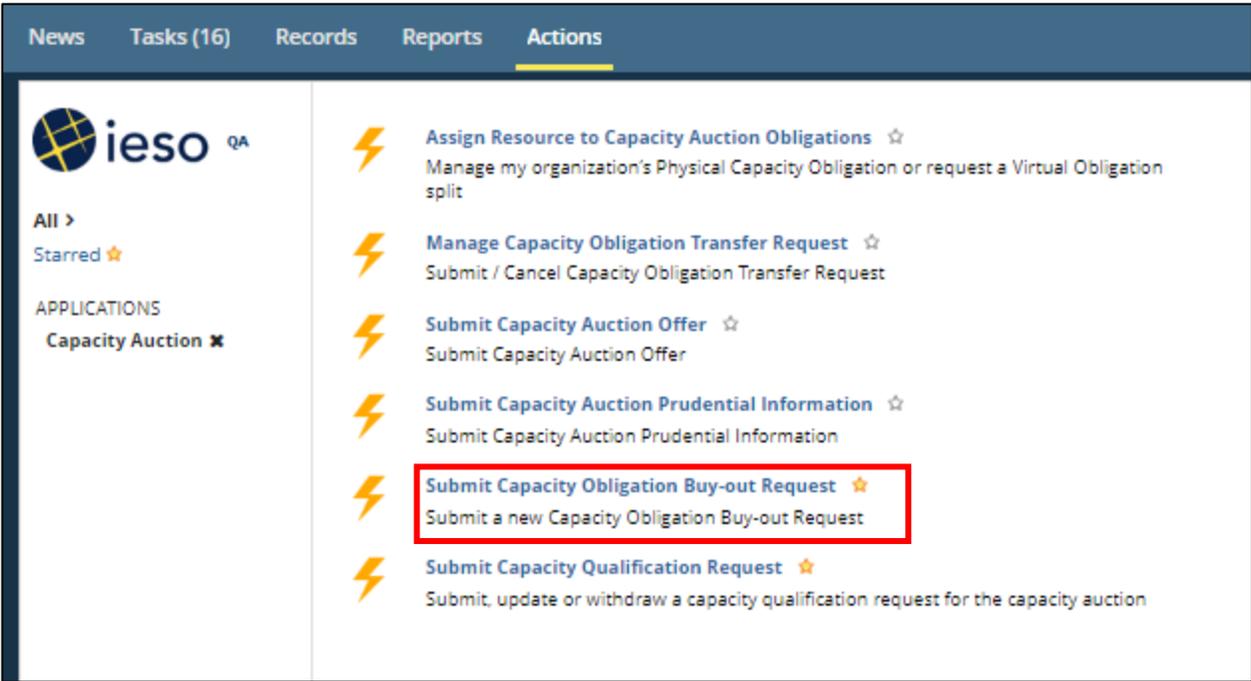
Step	Instruction	Picture
	<p>Note: if you wish to submit a second transfer request from the same capacity obligation, you must wait until the first transfer request has been approved by the IESO. Approval includes satisfying any revised prudential or deposit requirements.</p>	

11. How to Complete a Capacity Obligation Buy-out Request

The following table provides step-by-step instructions, with accompanying screen captures, describing the process for completing a capacity obligation buy-out request using the Online IESO web-based system.



Step	Instruction	Picture
1	<p data-bbox="331 219 699 284">Action: Manage Capacity Obligation Buy-out Request</p> <p data-bbox="331 310 716 410">The Capacity Auction Contact is the contact role that can submit a buy-out request.</p> <p data-bbox="331 435 732 532">Log in to the Online IESO web-based registration system using this link.</p> <p data-bbox="331 557 699 621">Enter your Username and Password and click Sign In.</p>	

Step	Instruction	Picture
2	<p>Click Actions on the menu bar at the top of the page.</p> <p>To submit a buy-out request (either partial, for a portion of the capacity obligation, or full, for the entire capacity obligation), select Submit Capacity Obligation Buy-out Request from the list of available action items displayed on the subsequent screen.</p>	 <p>The screenshot shows the IESO online interface. At the top, there is a navigation bar with tabs for 'News', 'Tasks (16)', 'Records', 'Reports', and 'Actions'. The 'Actions' tab is selected and highlighted with a yellow underline. Below the navigation bar, the IESO logo is visible on the left. A list of actions is displayed on the right, each preceded by a yellow lightning bolt icon. The action 'Submit Capacity Obligation Buy-out Request' is highlighted with a red rectangular box. Below this action, a sub-description reads 'Submit a new Capacity Obligation Buy-out Request'. Other actions in the list include 'Assign Resource to Capacity Auction Obligations', 'Manage Capacity Obligation Transfer Request', 'Submit Capacity Auction Offer', 'Submit Capacity Auction Prudential Information', and 'Submit Capacity Qualification Request'.</p>

Step	Instruction	Picture
3	<p>Select your Organization name from the drop-down list and the Obligation Period for which you want to buy-out the capacity obligation.</p> <p>Click Next.</p>	

Step	Instruction	Picture
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4 On the following screen, you will be presented with a table of all the Capacity Auction Resources (CARs) relevant to your organization. As part of this buy-out request, you will need to identify:

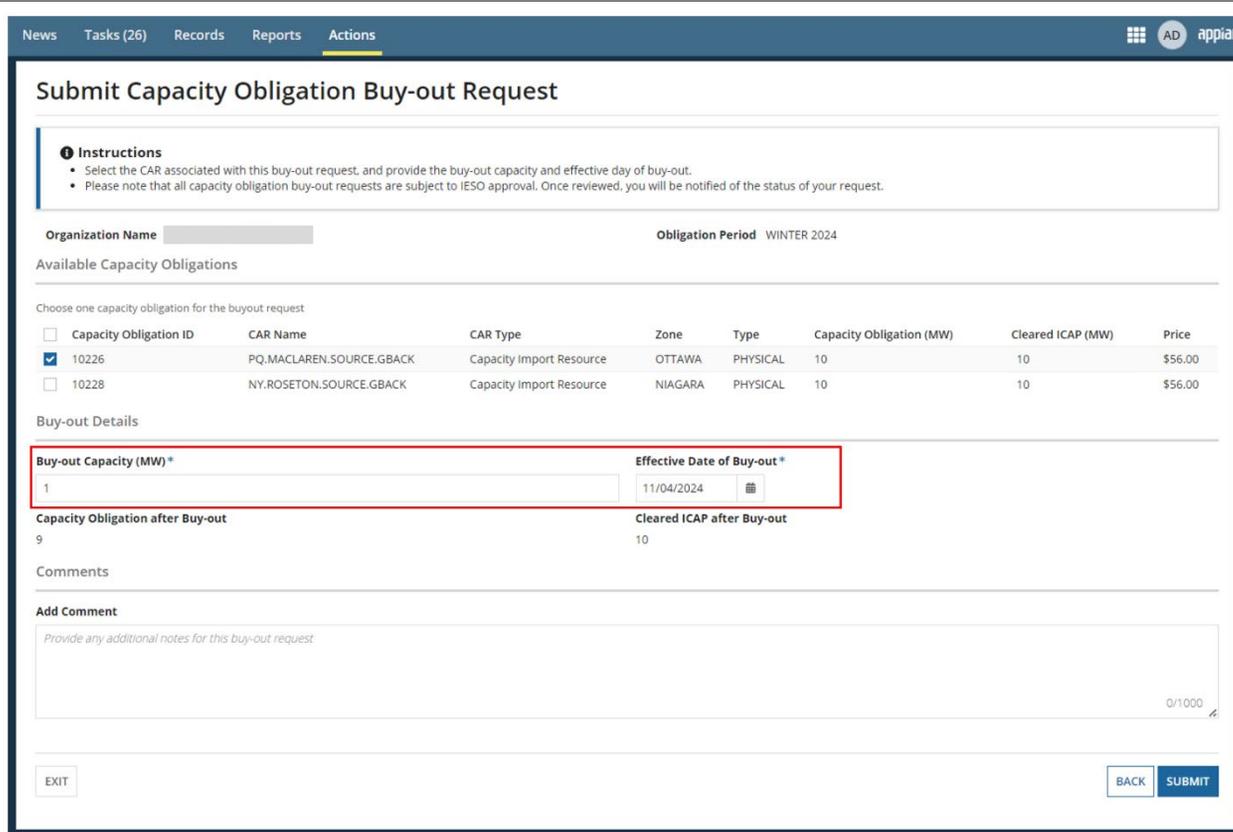
- The CAR associated with the capacity obligation of which, the buy-out is for;
- The amount of capacity you wish to buy-out;
- The effective date of the buy-out.

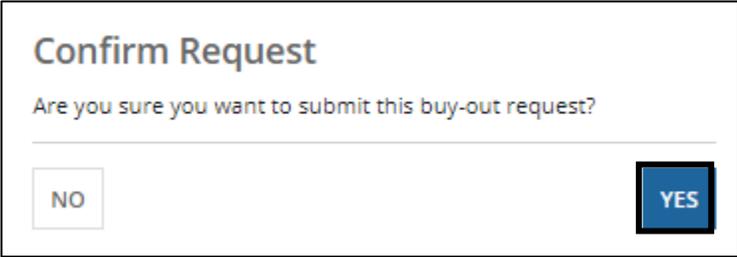
IESO requires that you provide a reason for the buy-out request in the comment box.

Each buy-out request is submitted for one CAR at a time. Click **Submit**.

Note: The revised capacity obligation after subtracting the buy-out capacity must be a minimum of 1 MW for a partial buy-out, or 0 MW for a full buy out.

The effective date of buy-out date must be at least two (2) business days out from the request date.



Step	Instruction	Picture
5	<p>A dialog box will display asking you to confirm the submission of the buy-out request. Click Yes.</p> <p>An approval email will be issued within two (2) business days of receipt of the buy-out request. Within the following five (5) business days, an email will be sent by the IESO to confirm other buy-out details, including buy-out settlement amounts and revised capacity prudential support.</p> <p>You may also go to the Records page to view the buy-out requests submitted and their status under Capacity Obligation Buy-out Requests.</p> <p>Note: A buy-out request cannot be withdrawn once it is submitted.</p>	

12. Additional Resources

- [Market Manual 12: Capacity Auctions](#)
- [Market Manual 7.3: Outage Management](#)
- [Submitting, Revising and Cancelling Energy Bids](#)
- [Submitting, Revising and Cancelling Energy Offers](#)
- [Submitting, Revising and Cancelling Import Offers and Export Bids](#)
- [Online IESO Roles and Responsibilities](#)
- [IESO Gateway User Guide](#)
- [Capacity Auction \(ieso.ca\)](#)