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.

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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.

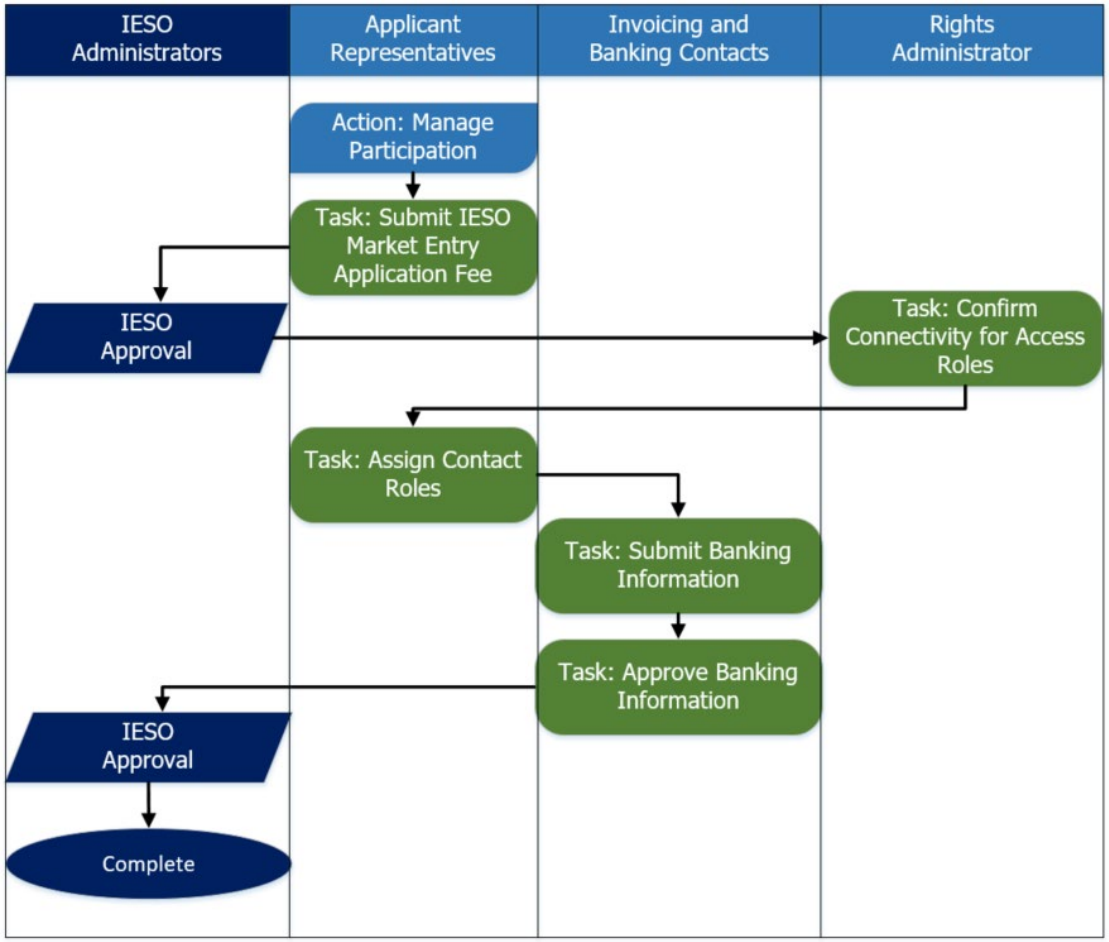
The timelines for each of the milestones that need to be completed for participating in the auction are provided in the "Capacity Auction Timelines" document posted on the webpage.

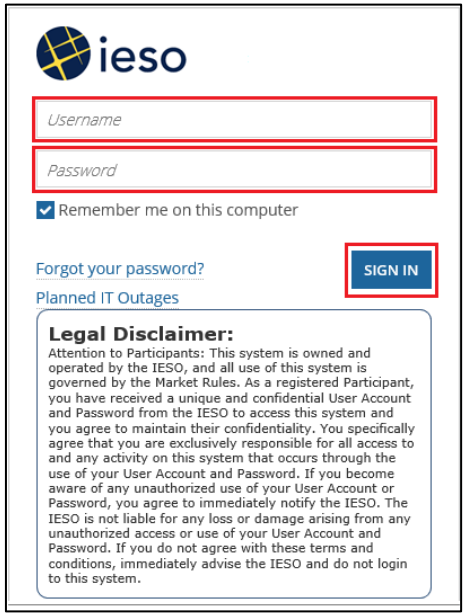
Note:

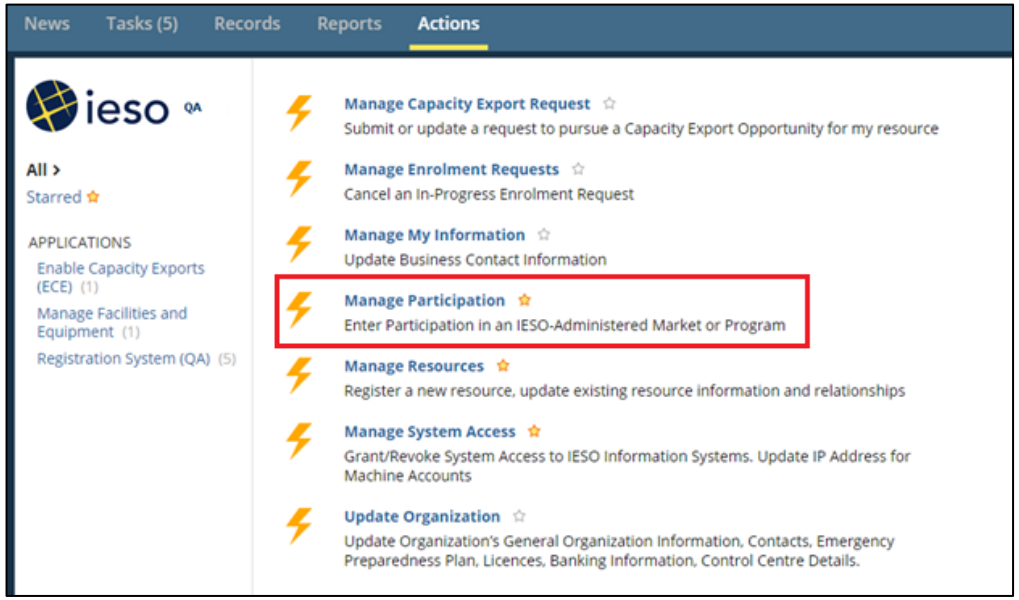
The Market Participant must have an active Gateway account and must be assigned to an appropriate a contact role(s) to complete these activities. Once the Market Participant is assigned to a contact role(s), it may take a day for the IESO system to process the change. Refer to the IESO Gateway User Guide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

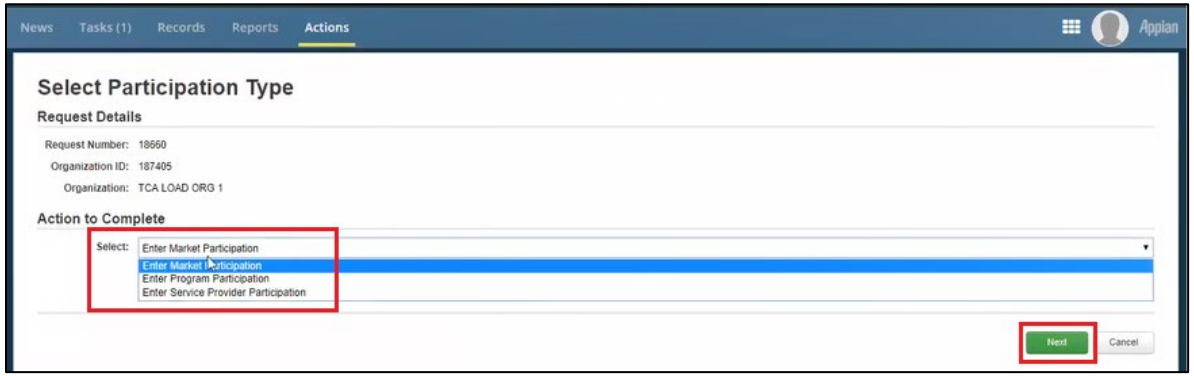
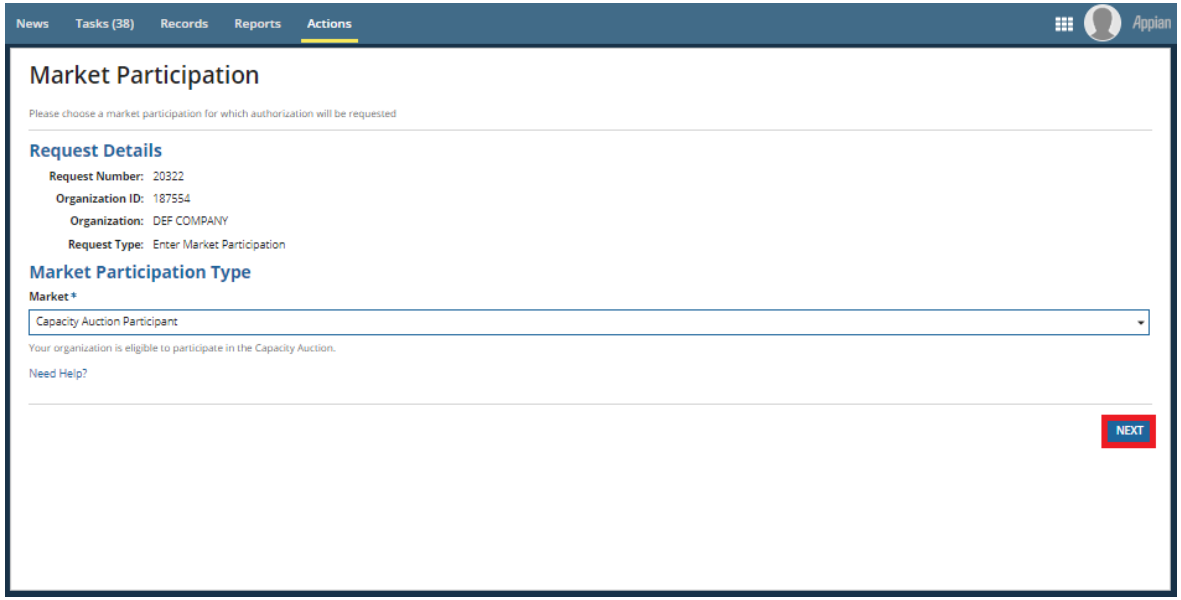
1. How to Authorize as a Capacity Auction Participant

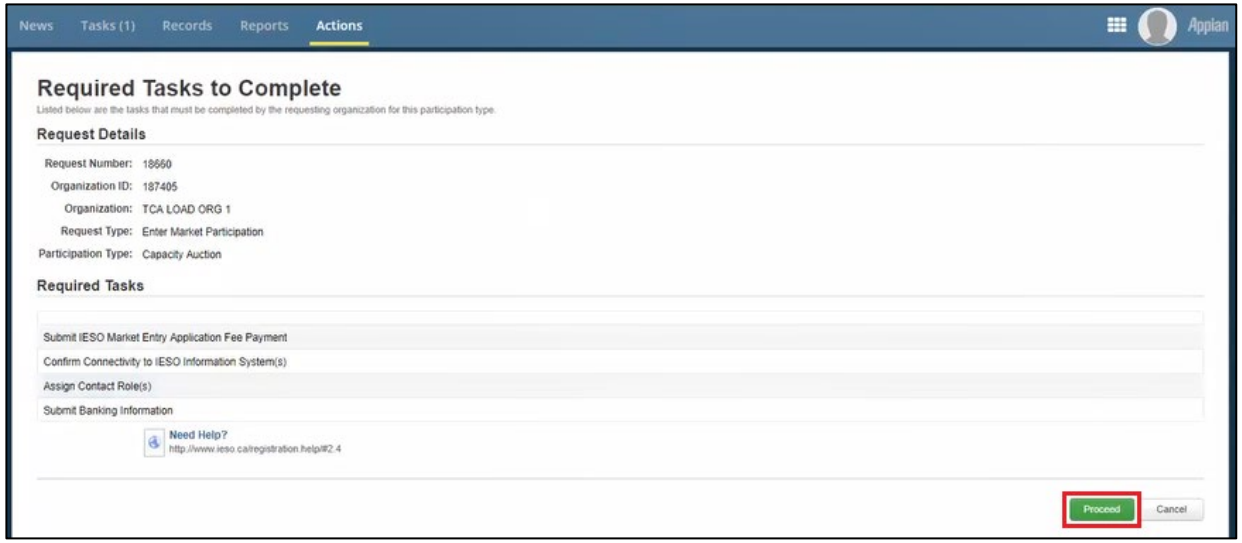
The following chapter provides an overview, followed by step-by-step screen captures, describing how to authorize as a capacity auction participant (CAP) using the Online IESO web-based registration system

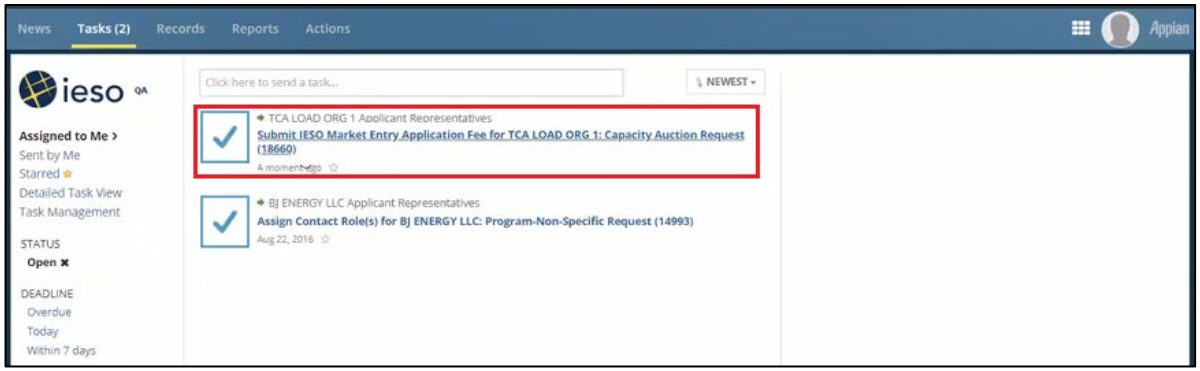
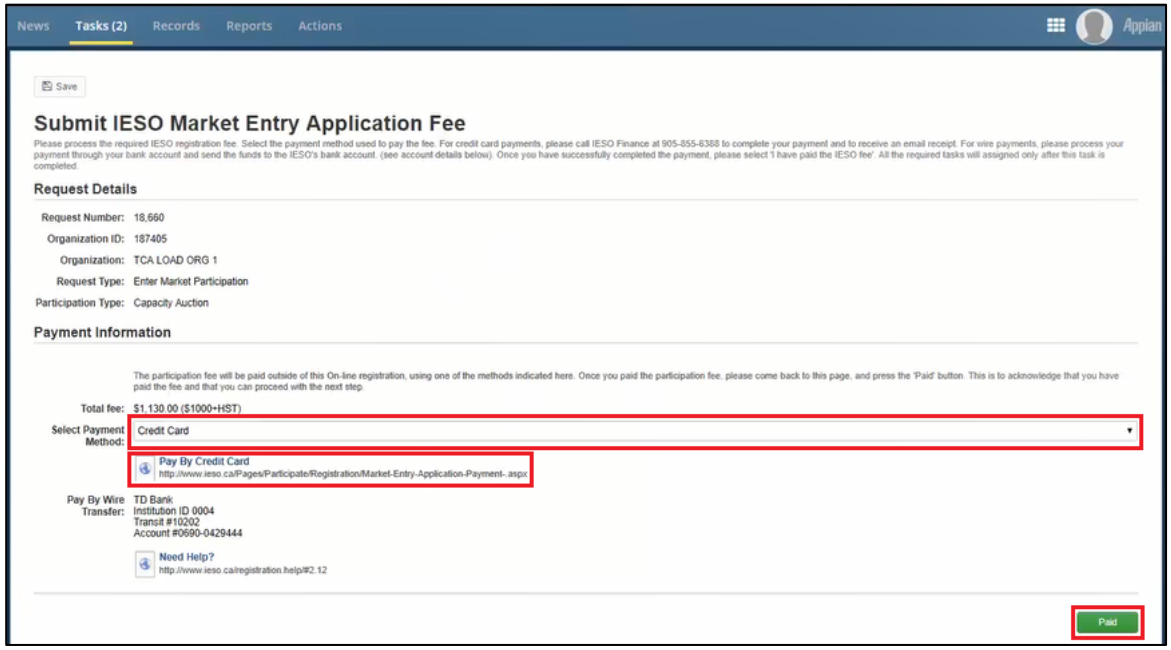


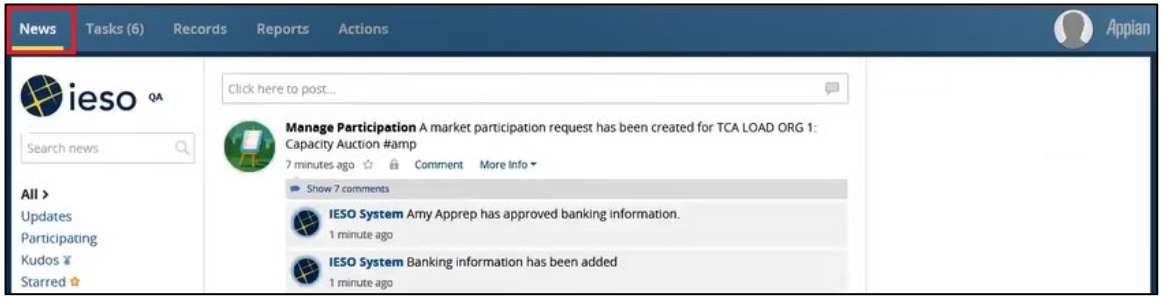
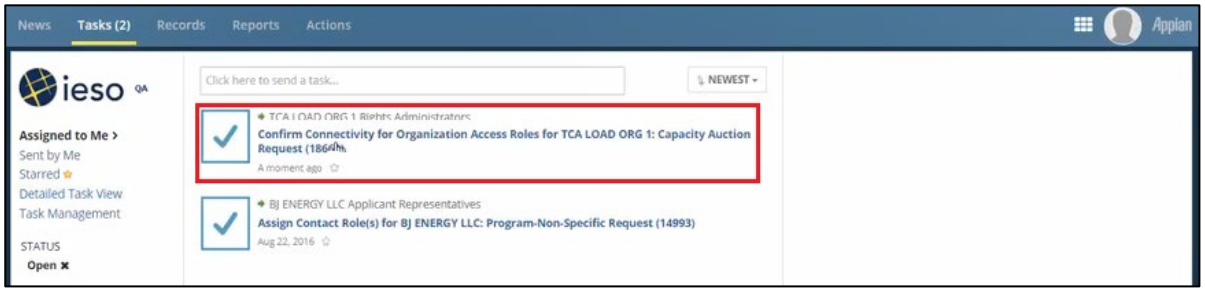
Step	Instruction	Picture
1	Action: Manage Participation An Applicant Representative Logs in to the Online IESO web-based registration system using this link. Enter your Username and Password and click **Sign In**. A new user needs to activate their gateway account to access Online IESO.	

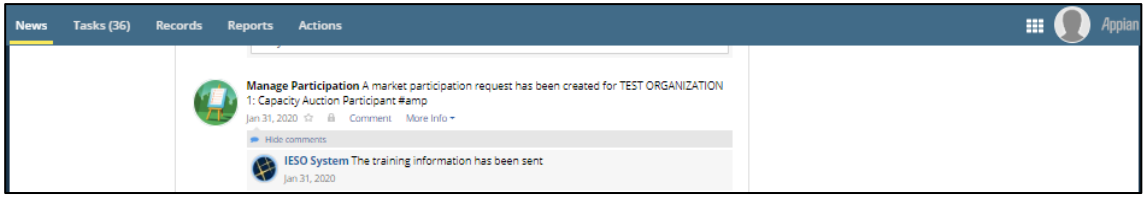
Step	Instruction	Picture
2	Click **Actions** on the menu bar at the top of the screen. Click **Manage Participation** from the list of available action items displayed on the subsequent screen.	
3	The **Choose Organization** screen is displayed. Select the check box corresponding to the organization that you wish to become authorized as a capacity auction participant (CAP), and click **Next**.	

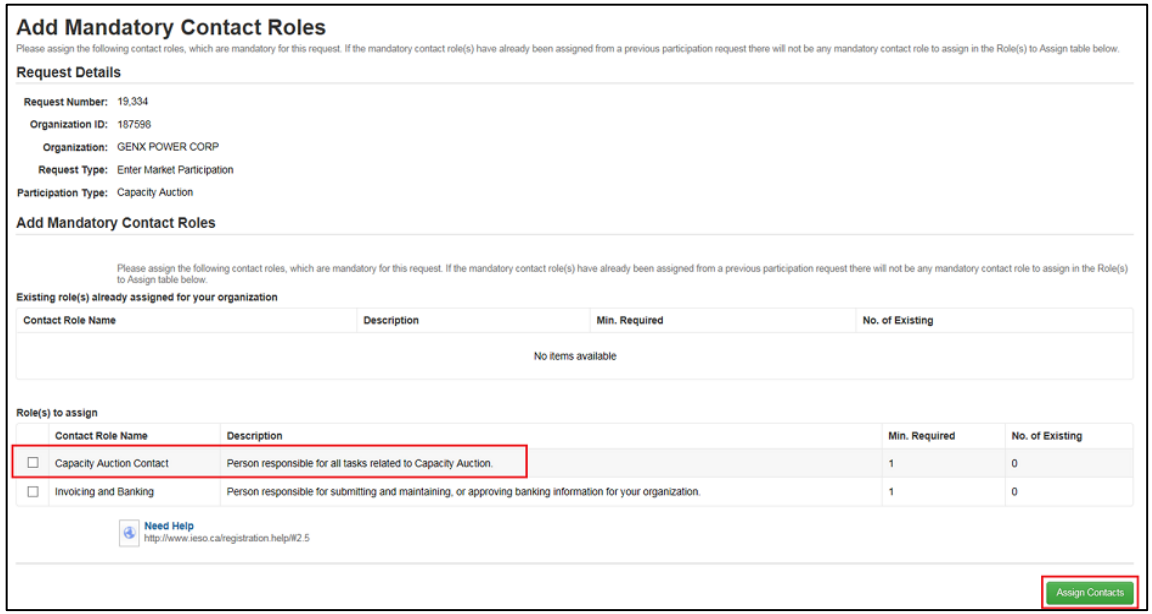
Step	Instruction	Picture
4	The Select Participation Type screen is displayed. In the **Action to Complete** drop-down list, select **Enter Market Participation**, and click **Next**.	
5	The **Market Participation** screen is displayed. In the **Market Participation Type** drop-down list, select **Capacity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

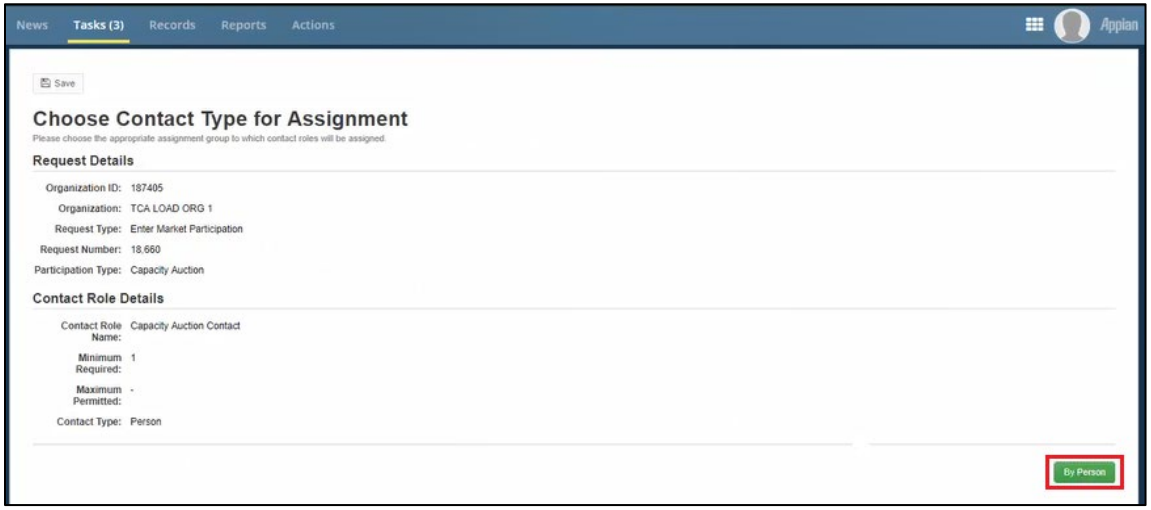
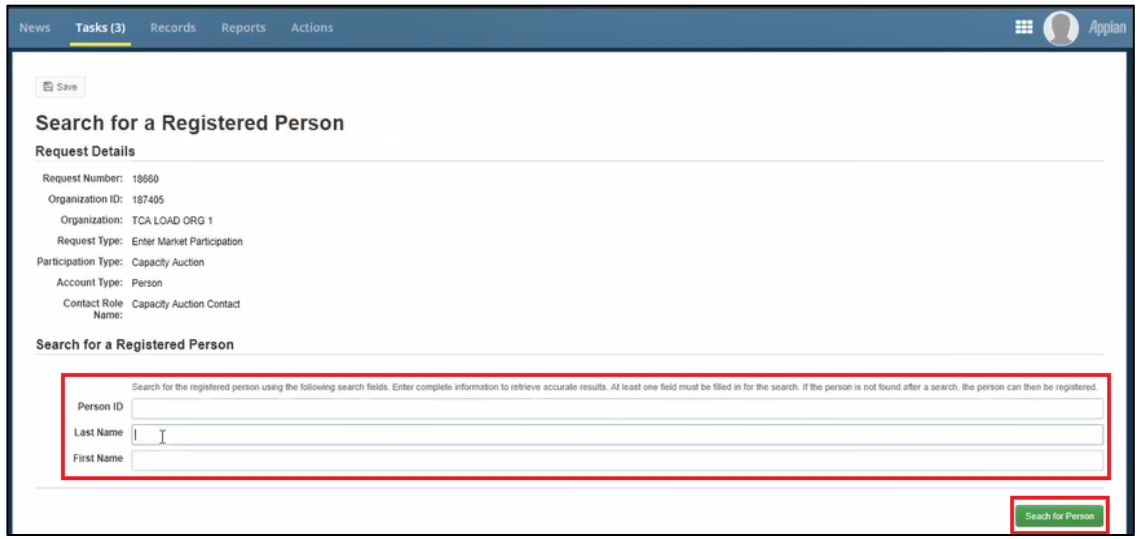
Step	Instruction	Picture
6	The **Required Tasks to Complete** screen is displayed for your review – click **Proceed**. Note: The following required tasks are applicable only to organizations with new Demand Response Resources: • Submit IESO Market Entry Application Fee Payment (Applicant Representative) • 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.	

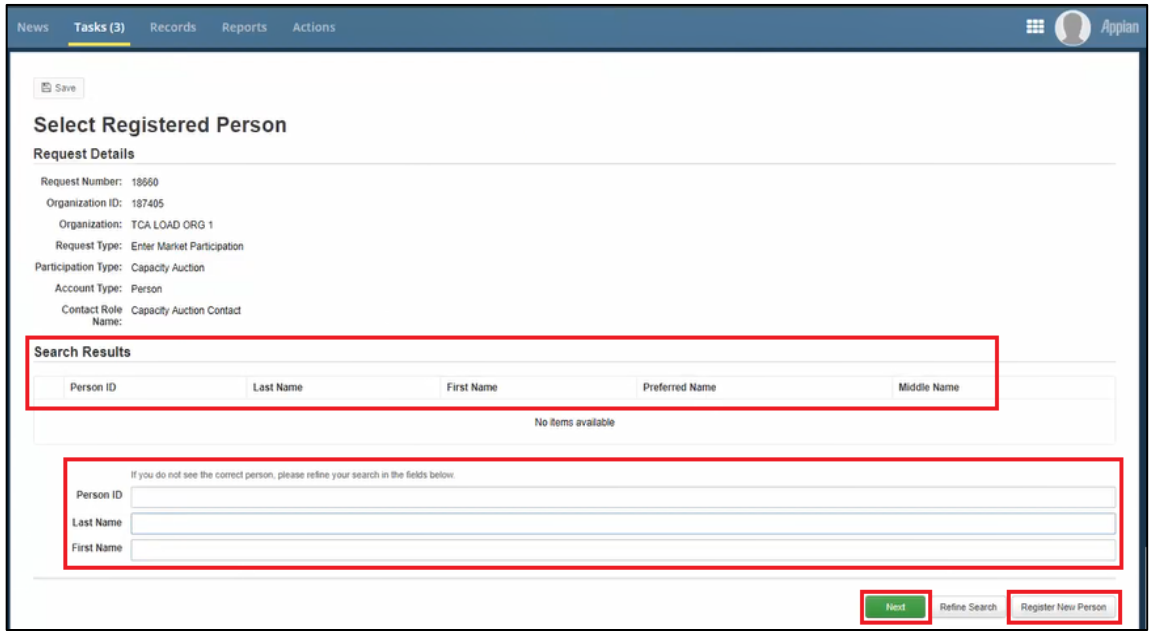
Step	Instruction	Picture
7	Task: Submit IESO Market Entry Application Fee (Applicant Representative) Click **Tasks** on the menu bar at the top of the screen. Click **Submit IESO Market Entry Application Fee for <your organization>** from the list of available tasks displayed on the subsequent screen. 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**.	

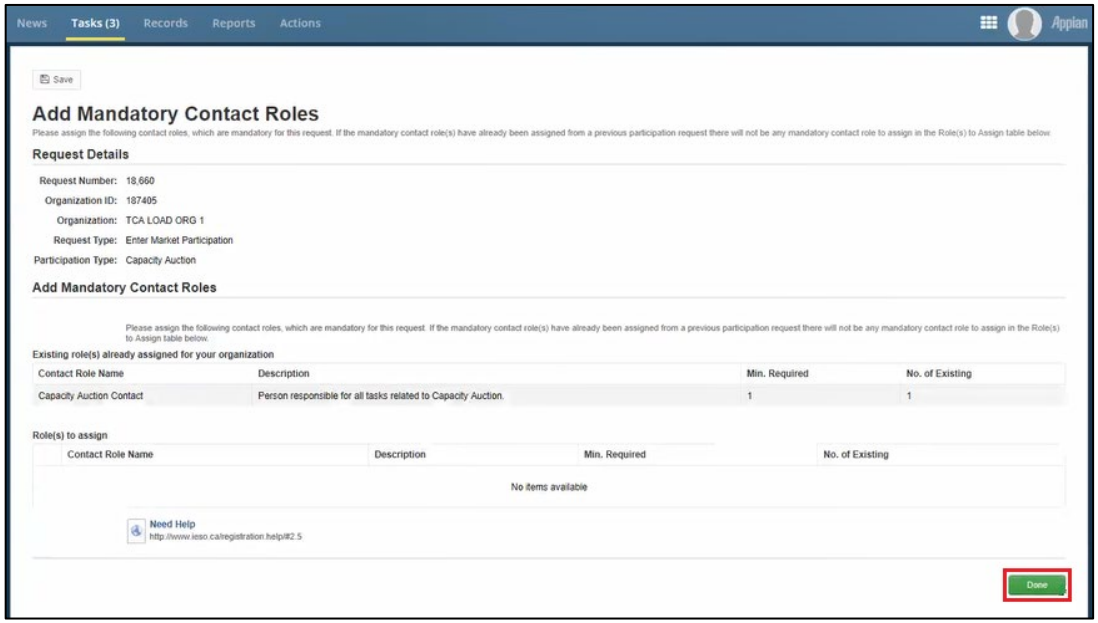
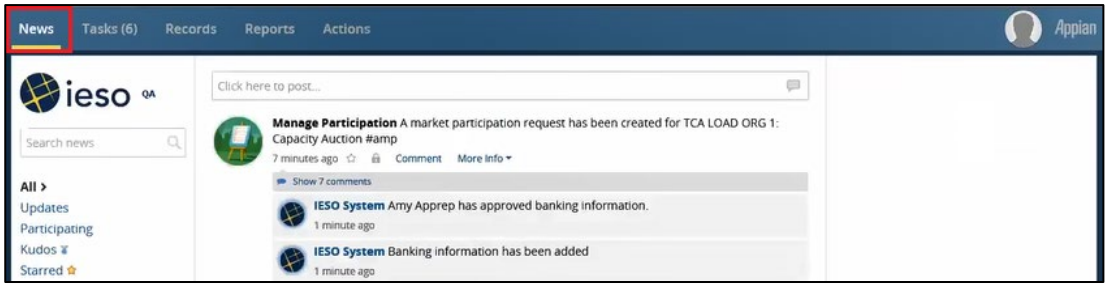
Step	Instruction	Picture
9	Click **News** on the menu bar at the top of the screen to view the Payment Received notification.	
10	You will also receive an email with the subject line **Training Info for <your organization>: Capacity Auction Participant Request**. This email provides you with valuable links to training documents and contact information at the IESO.	N/A
11	Task: Confirm Connectivity for Access Roles Click **Tasks** on the menu bar at the top of the screen. Click **Confirm Connectivity for Organization Access Roles for <your organization>: Capacity Auction Request** from the list of available tasks displayed on the subsequent screen.	

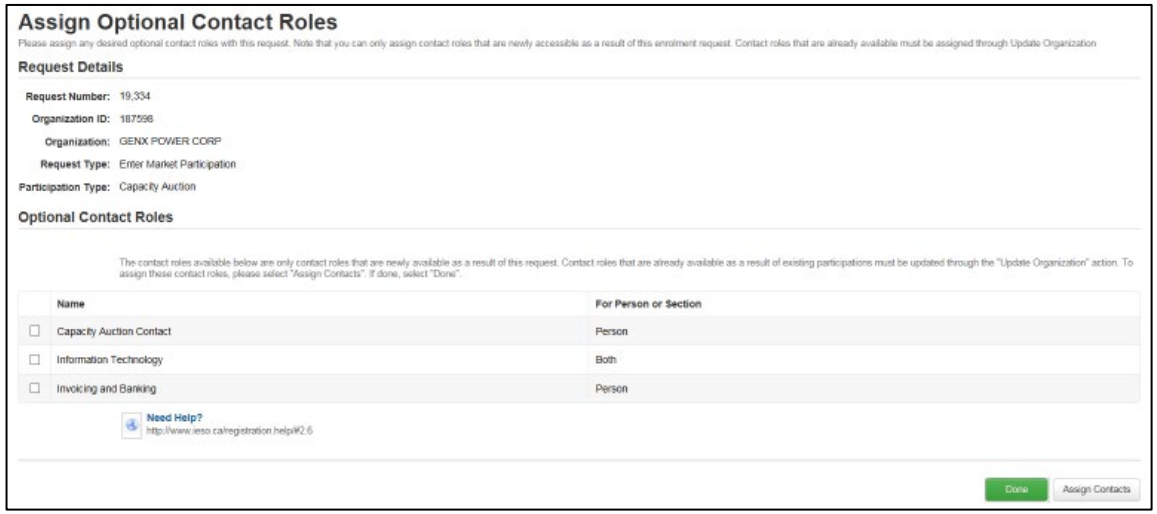
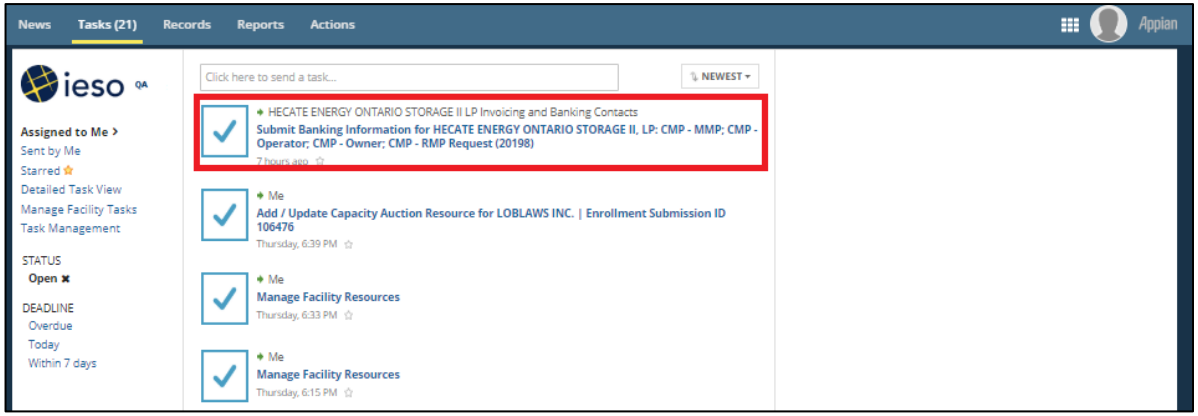
Step	Instruction	Picture
	Click **Yes** to confirm that you accept the task.	
12	After you confirm that you are able to access your participant reports (at the this link) by logging in with your credentials, select the appropriate check box via the **Confirm Connectivity to IESO Information Systems** 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.	

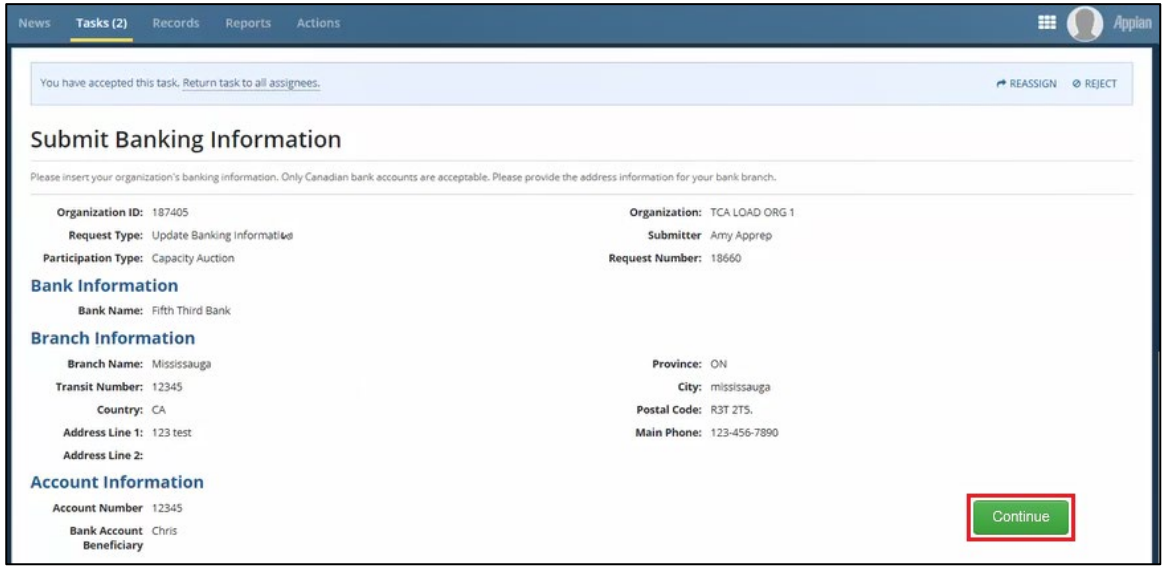
Step	Instruction	Picture
14	Task: Assign Contact Roles Click **Tasks** on the menu bar at the top of the screen. Click **Assign Contact Roles for <your organization>** from the list of available tasks displayed on the subsequent screen. Click **Yes** to confirm that you accept the task.	
15	The **Add 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.	

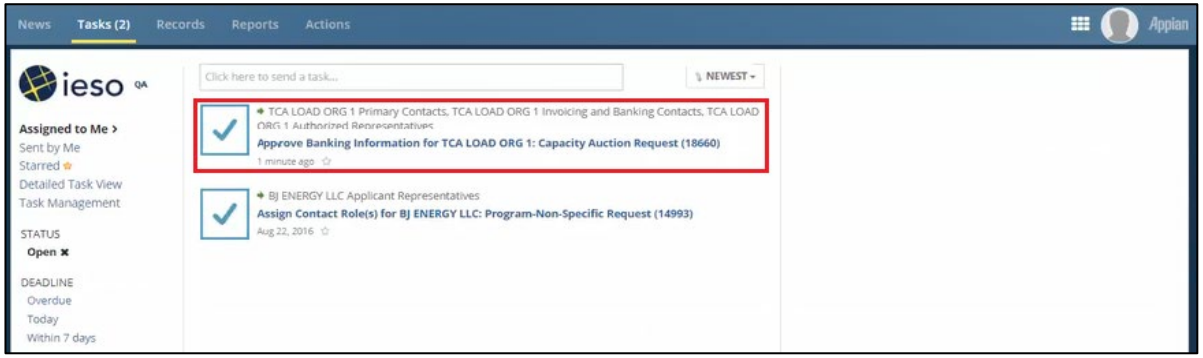
Step	Instruction	Picture
16	The **Choose Contact Type for Assignment** screen is displayed for your review – click **By Person** to proceed.	
17	The **Search for a Registered Person** screen is displayed. To search for a registered person, enter the name of the registered person in the search fields, and click **Search for Person**.	

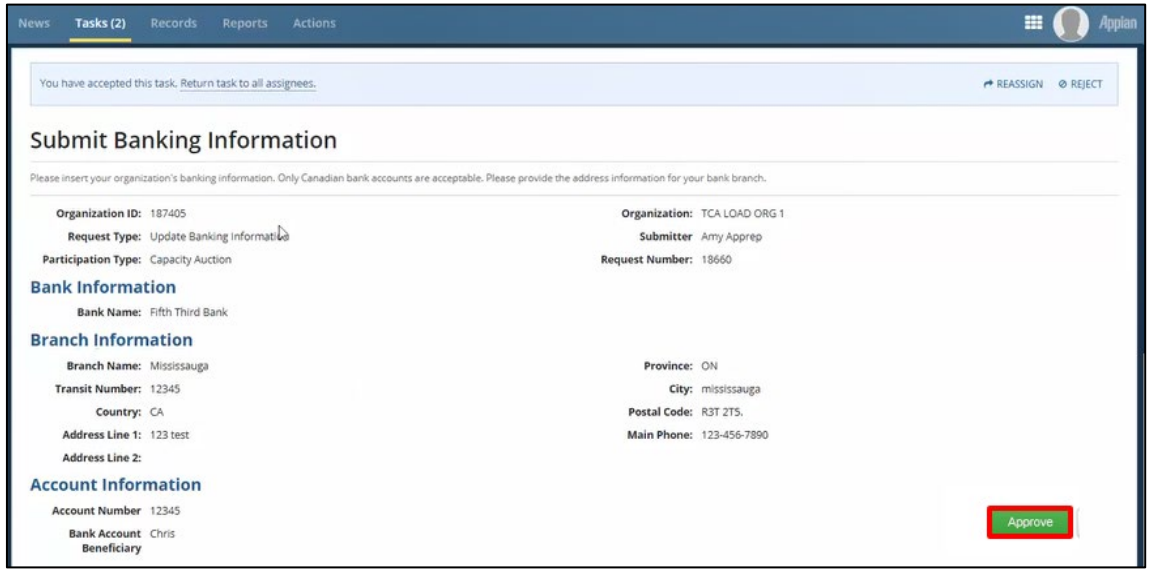
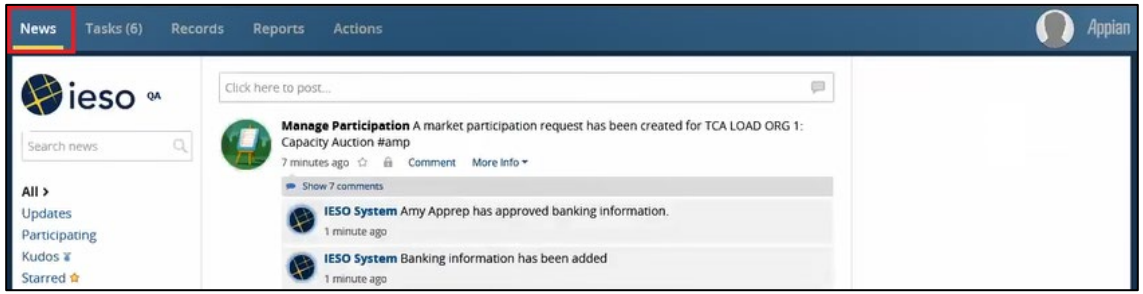
Step	Instruction	Picture
18	If a person is registered in the IESO database, that name appears in the **Search Results** via the **Select Registered Person** screen – select the corresponding check box, and click **Next**. If a person is not already in the IESO database, you must register that individual by clicking **Register New Person.**	
19	Repeat Steps 18 – 21 after selecting the check box corresponding to **Invoicing and Banking** listed under **Contact Role Name**.	

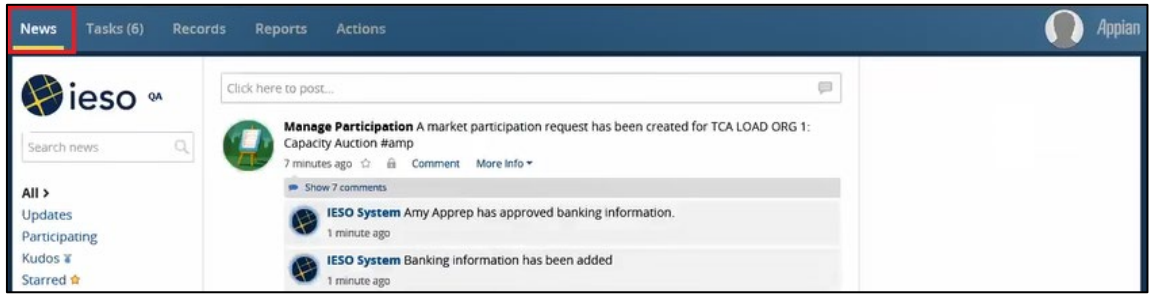
Step	Instruction	Picture
20	After all mandatary contact roles have been added, click **Done**. The registered person will receive the IESO contact role update notification email.	
21	Click **News** on the menu bar at the top of the screen to view the notification confirming that this step has been completed. 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.	

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.	

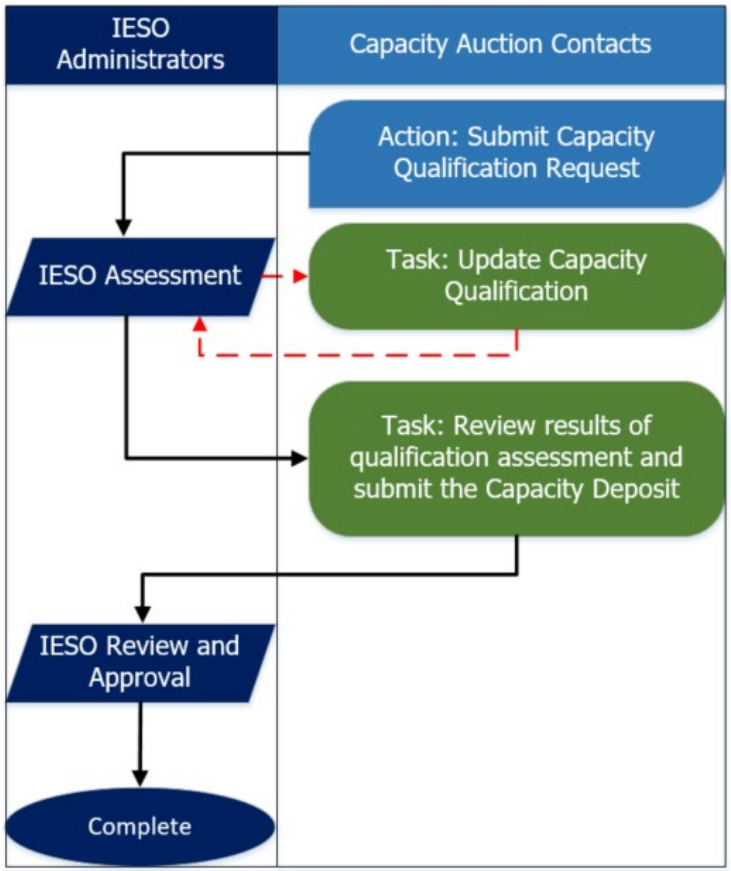
Step	Instruction	Picture
26	A second user (Primary Contact, Authorized Representative or other individual in the Invoicing and Banking contact role) must log in to the Online IESO web-based registration system in order to approve the banking information. Note: If the original user who submitted the task tries to also complete this task, an error message is displayed.	You are unable to approve the banking information in this task since the approver cannot be the same person who submitted the information. 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.
27	Task: Approve Banking Information 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.	
28	Click **Yes** to confirm that you accept the task.	N/A

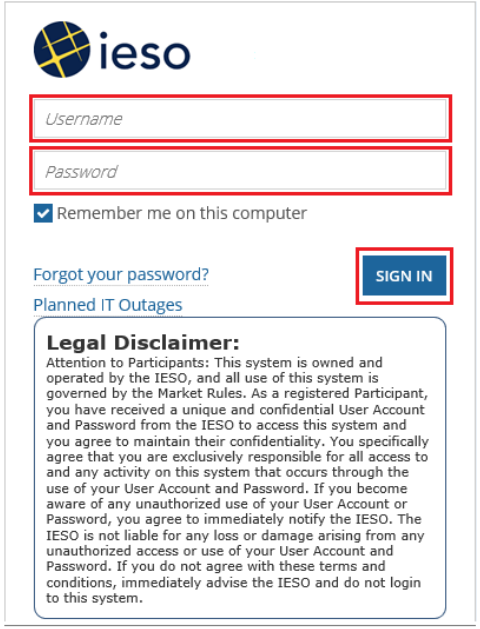
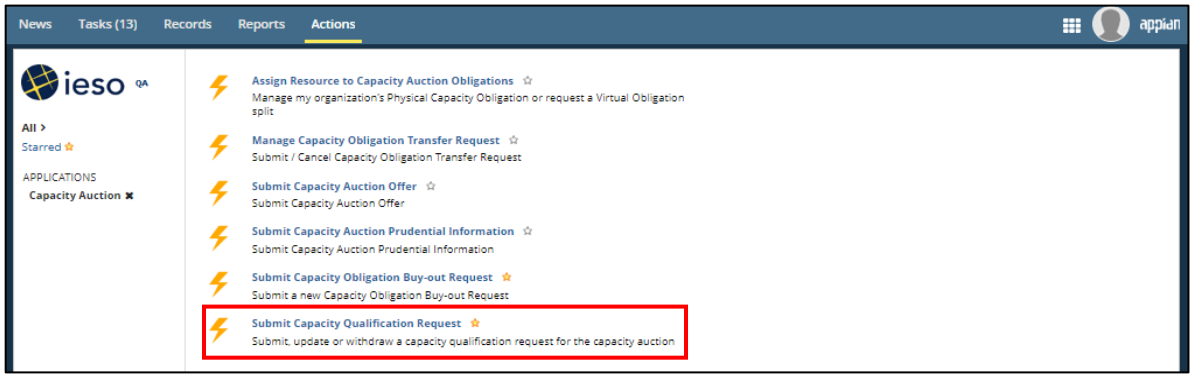
Step	Instruction	Picture
29	Review the information in the form, confirm or edit as required, and click **Approve.**	
30	The original user can view a confirmation notification that the form has been completed by clicking **News** on the menu bar at the top of the screen.	

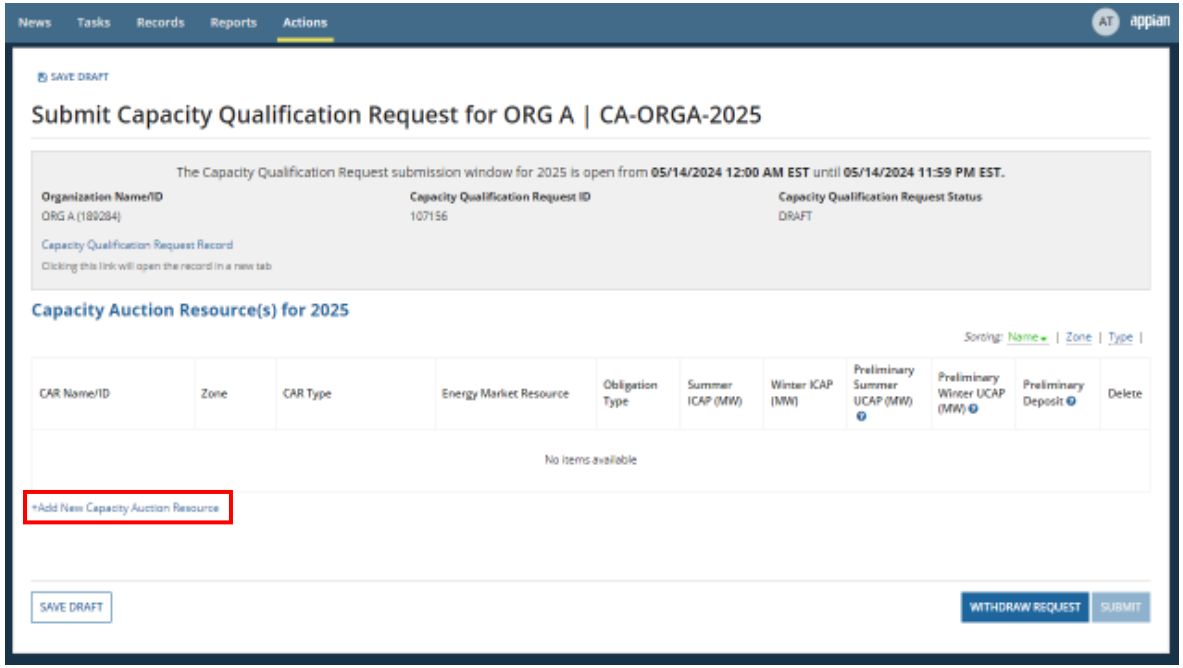
Step	Instruction	Picture
31	After all tasks have been completed, click **News** on the menu bar at the top of the screen to view a confirmation notification. You will also receive a Registration Approval Notification (RAN) in your email inbox after the IESO has completed the authorization process.	

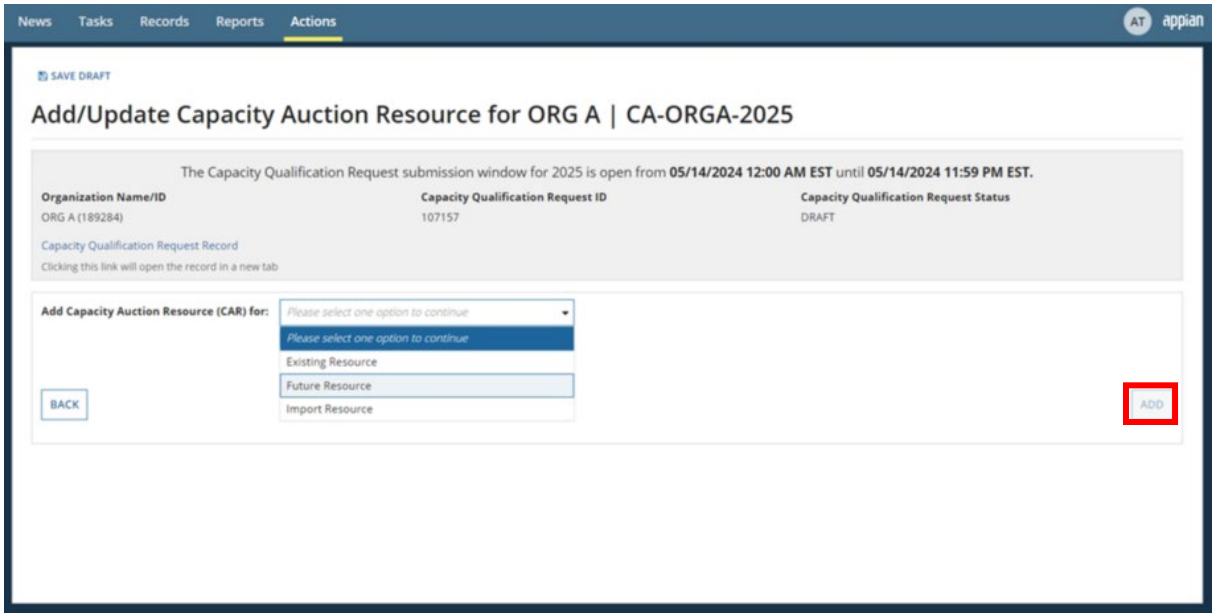
2. How to Submit a Capacity Qualification Request

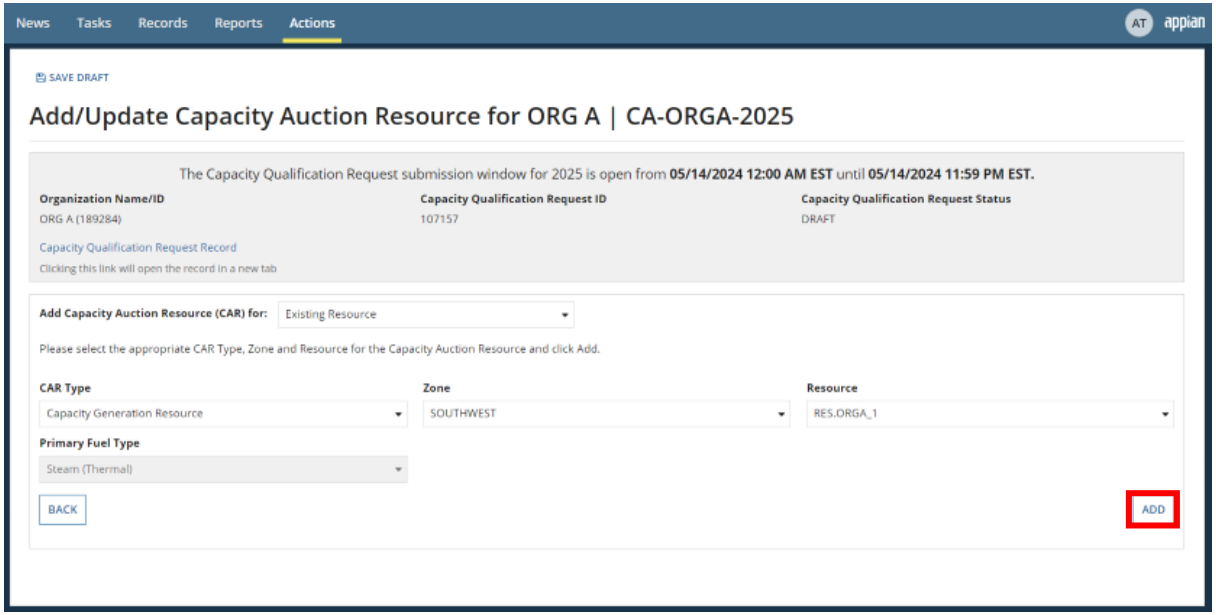
The following flowchart and table provides step-by-step instructions, with accompanying screen captures, describing how to submit a capacity qualification request using the Online IESO web-based registration system. You must receive a Registration Approval Notification (RAN) email authorizing you as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

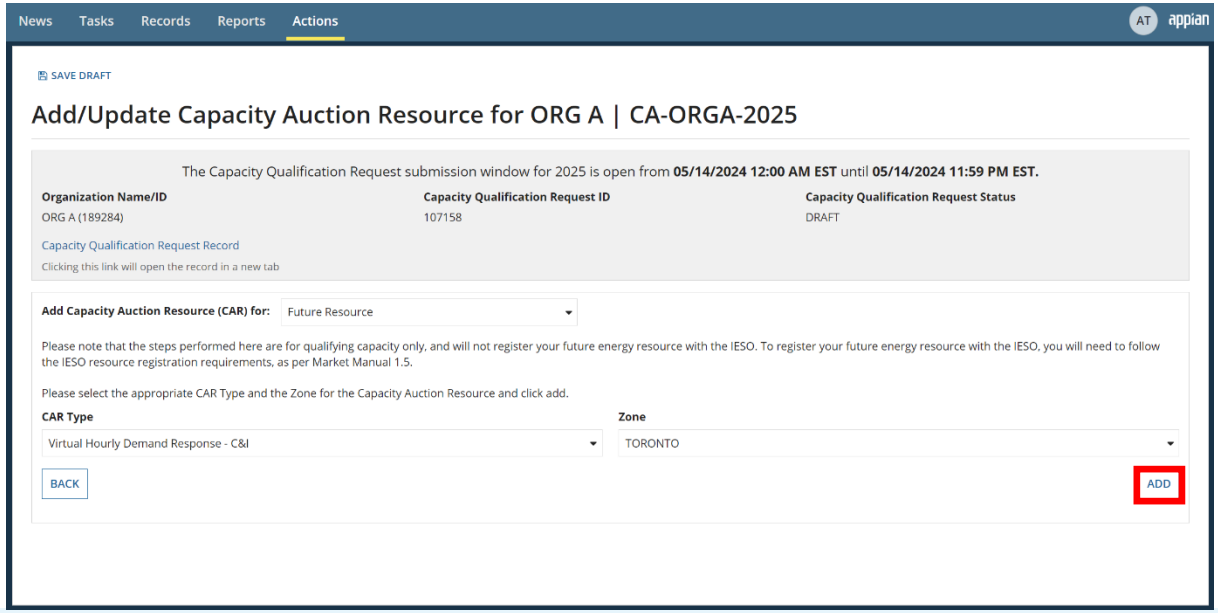


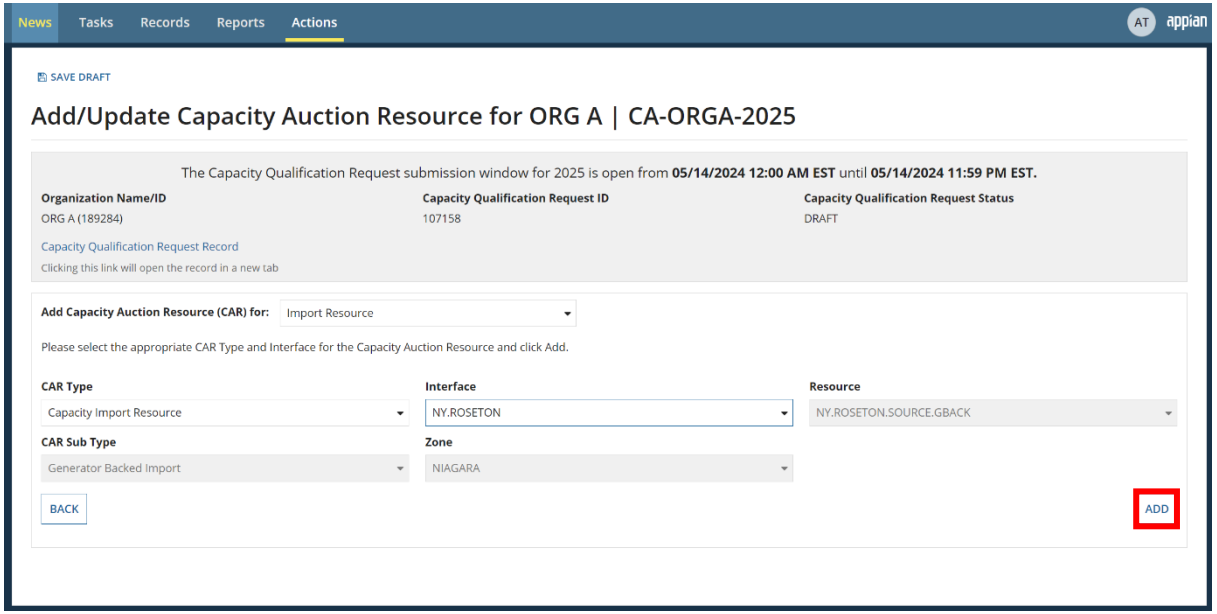
Step	Instruction	Picture
1	Action: Submit Capacity Qualification Request. The Capacity Auction Contact is the contact role that can submit a capacity qualification request. Log in to the Online IESO web-based registration system using this link. Enter your Username and Password, and click **Sign In**.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

Step	Instruction	Picture
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
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
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
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.

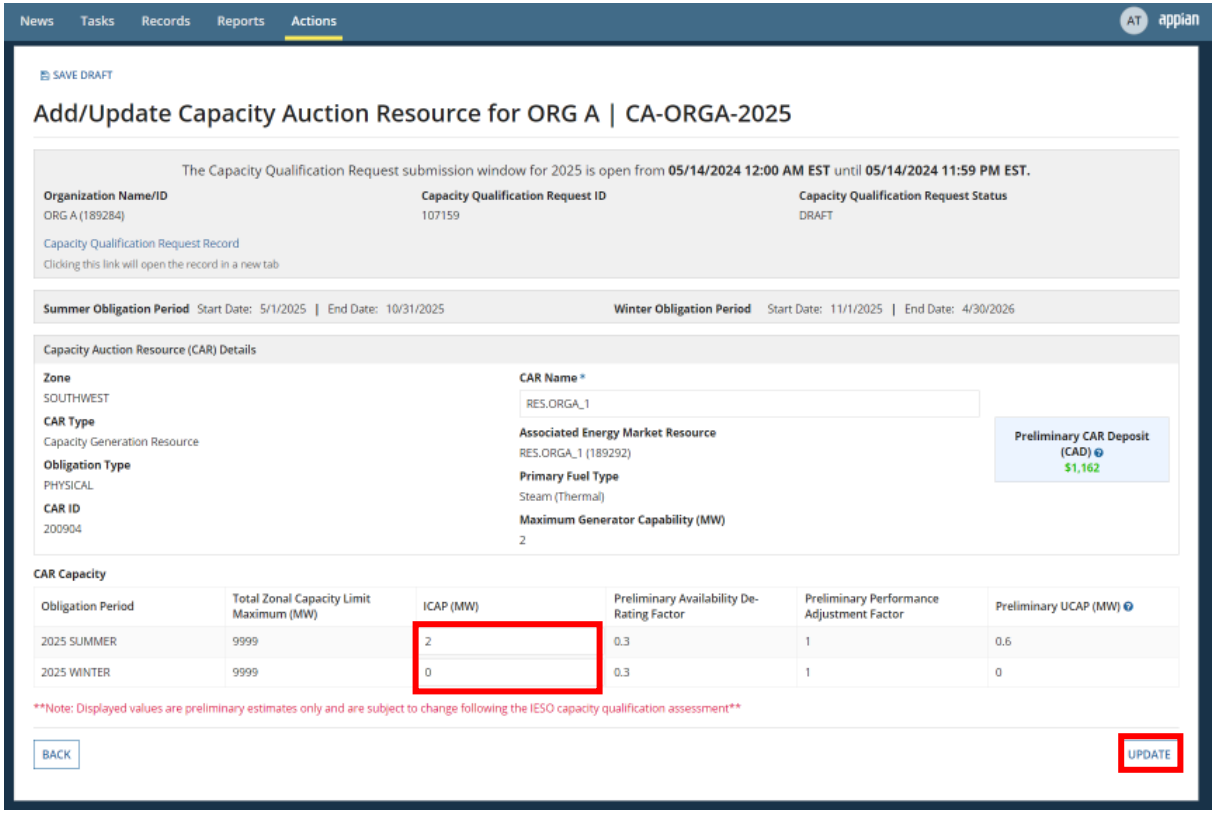
Step	Instruction	Picture
6C	If you selected **Import Resource** from the drop-down box in step 5, additional drop-down boxes will appear that will allow you to submit either a System-Backed Import or Generator-Backed Import Resource. Note: You can only submit a System-Backed Import Resource if your resource 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**.	

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



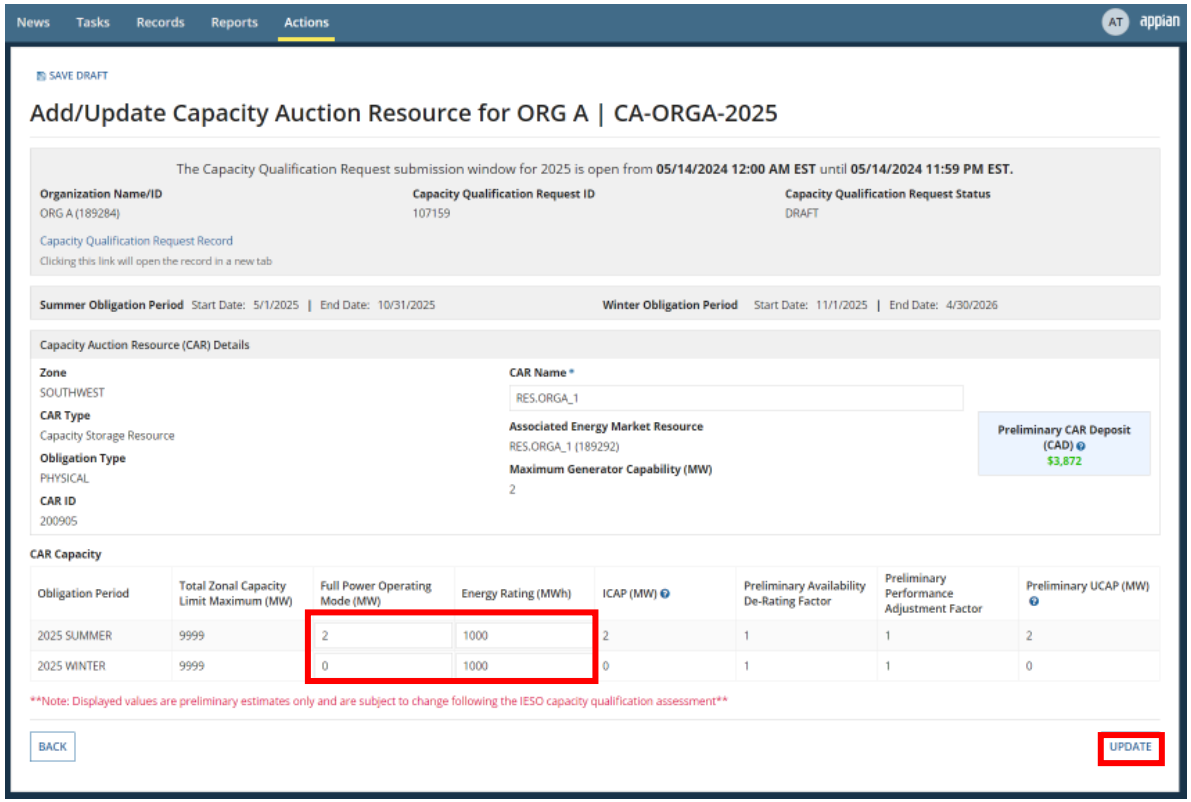
left of the **ICAP (MW)** column.

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.

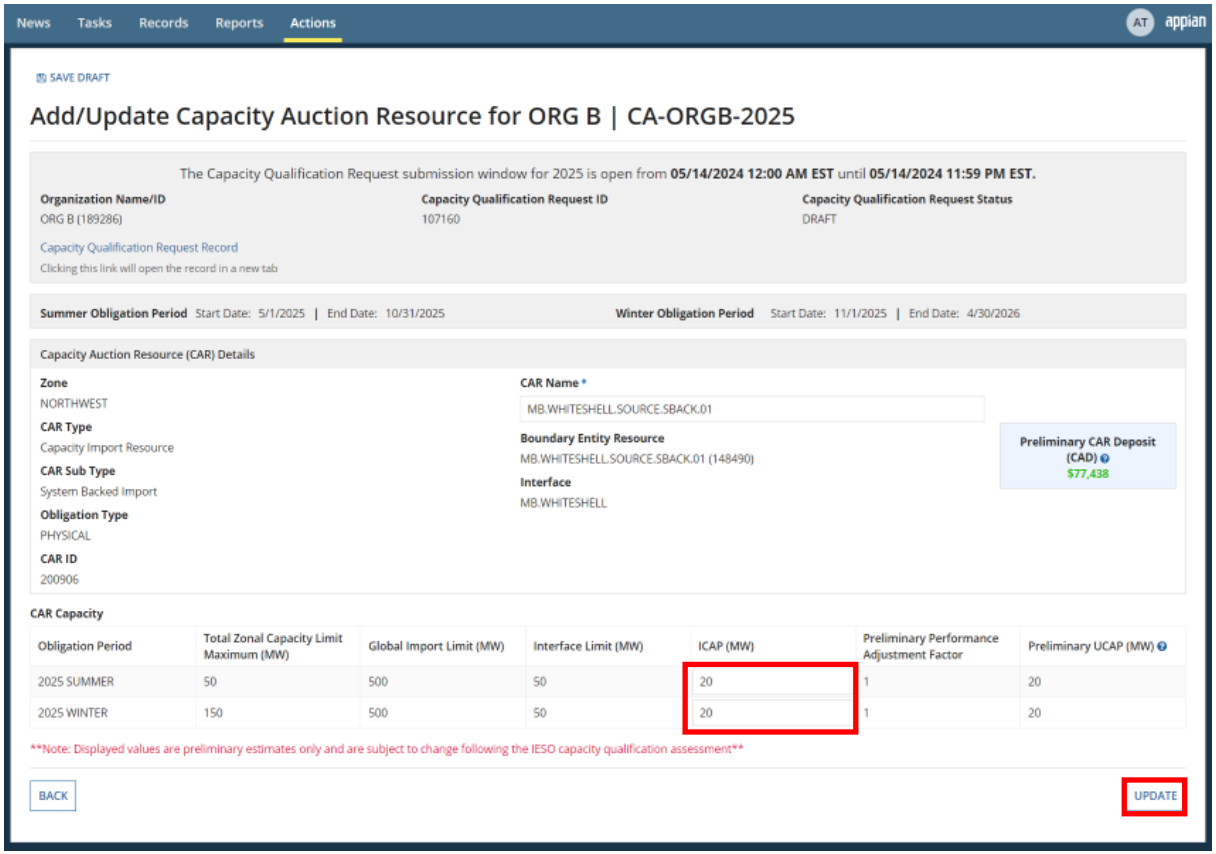
Note: The **Preliminary UCAP** is rounded up to one decimal place.

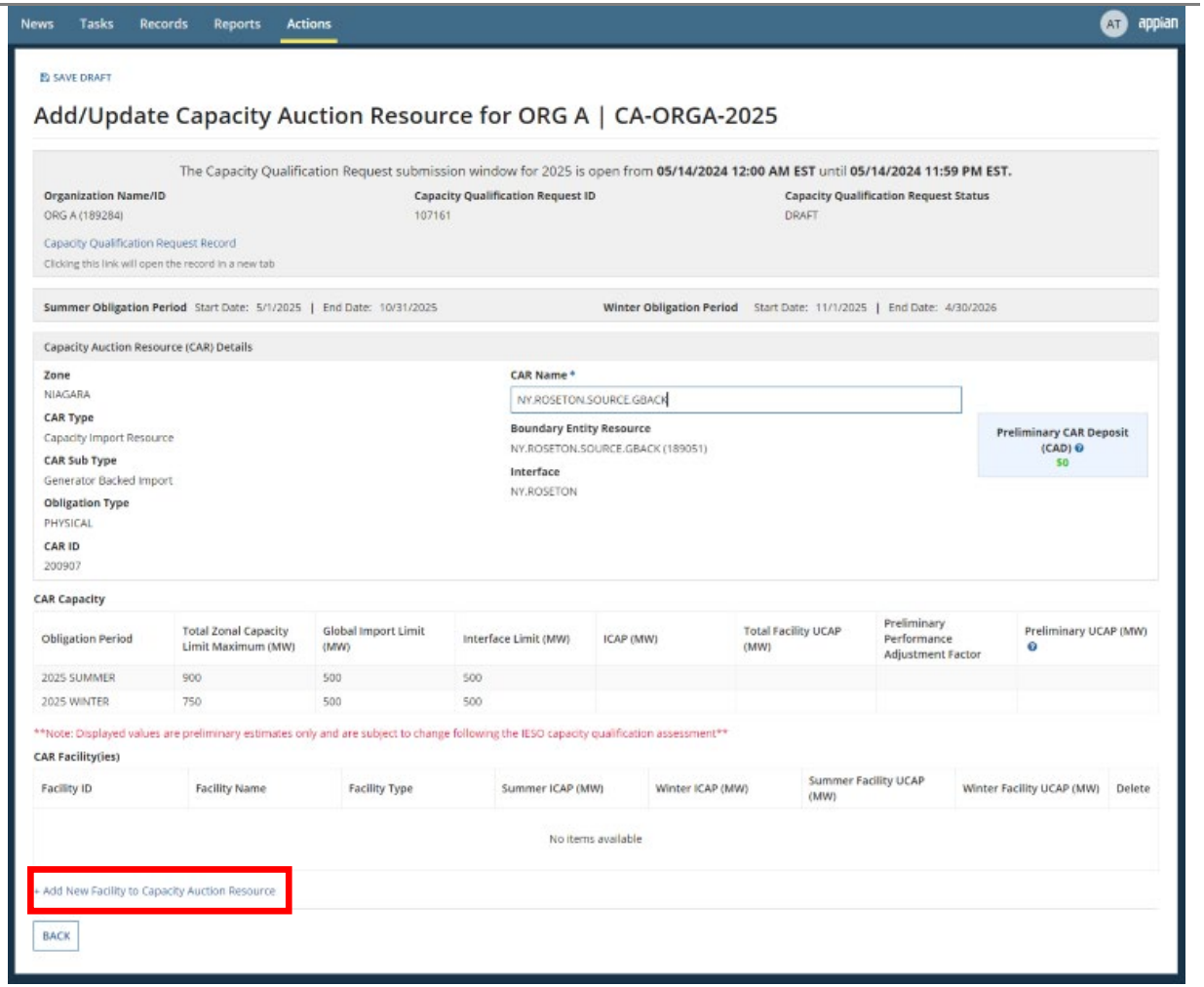
Once you have filled out this information, click **Update**.

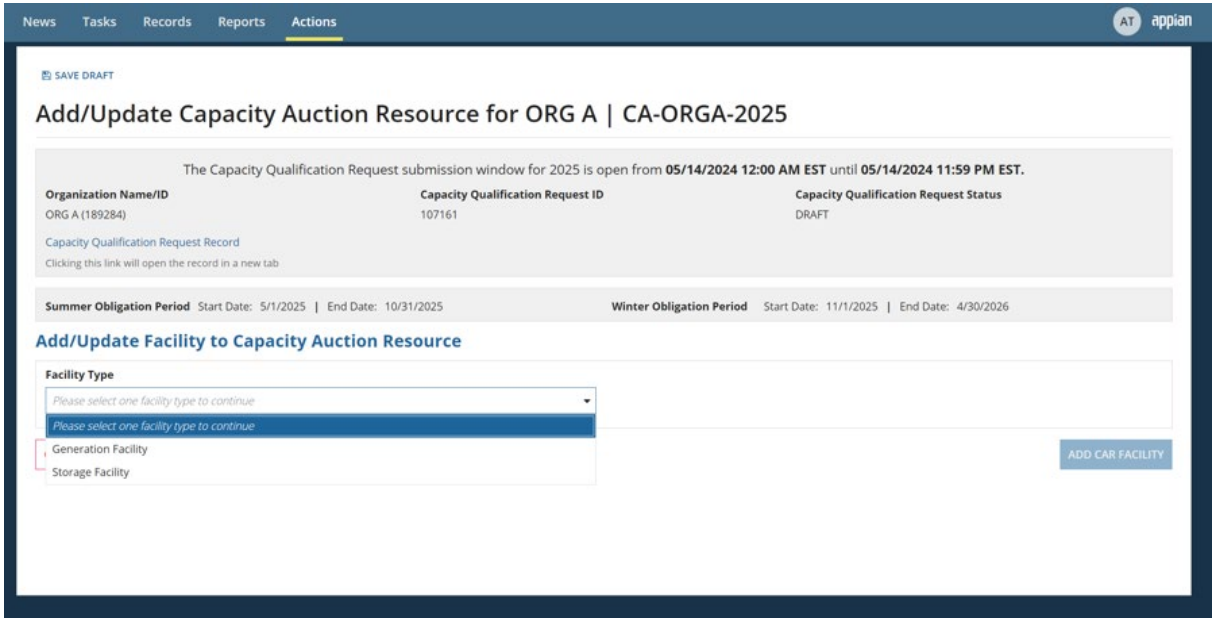
Proceed to Step **11**.

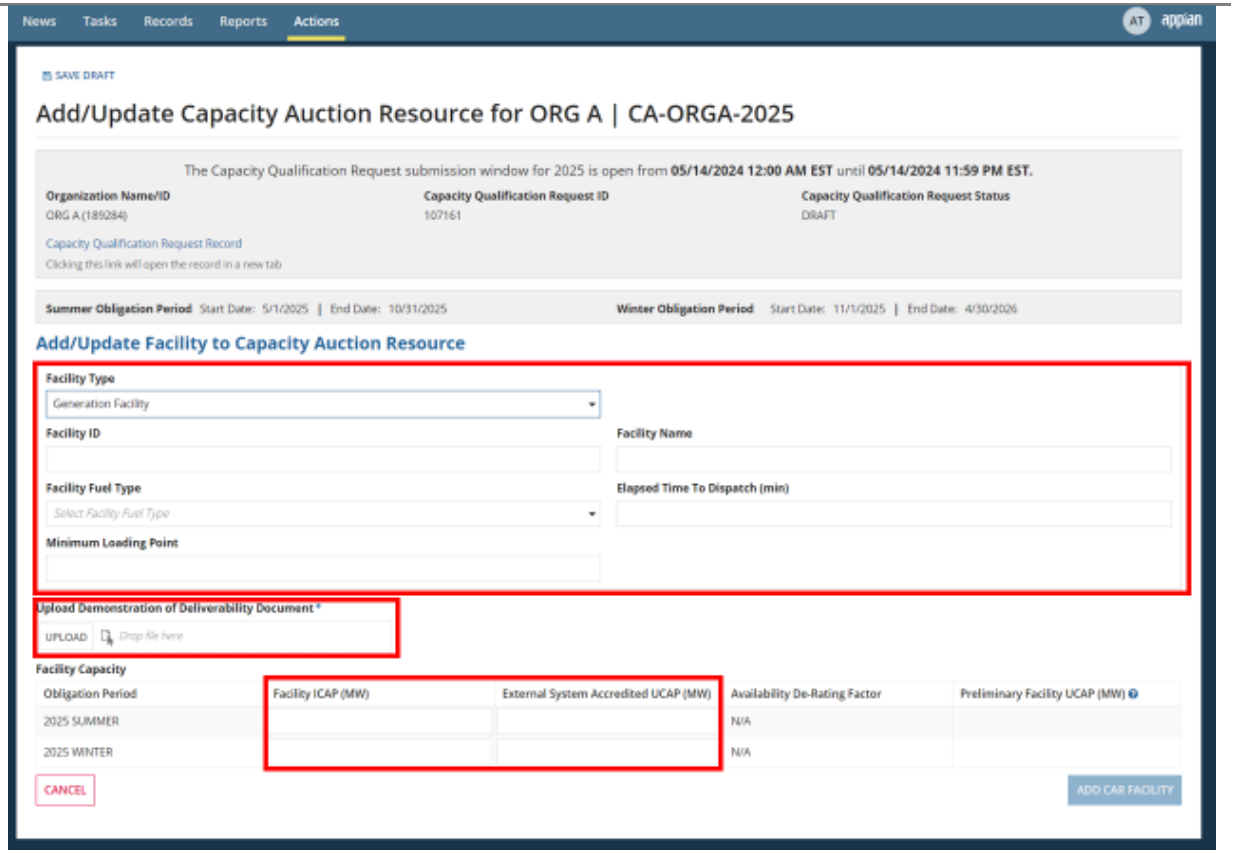
Step	Instruction	Picture
7B	This step applies if you are qualifying an existing **Capacity Storage Resource**. On this screen, you will enter: • the **Full Power Operating Mode** (MW) • the **Energy Rating** (MWh) Enter a 0 value for any obligation period that your resource will not be participating 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	

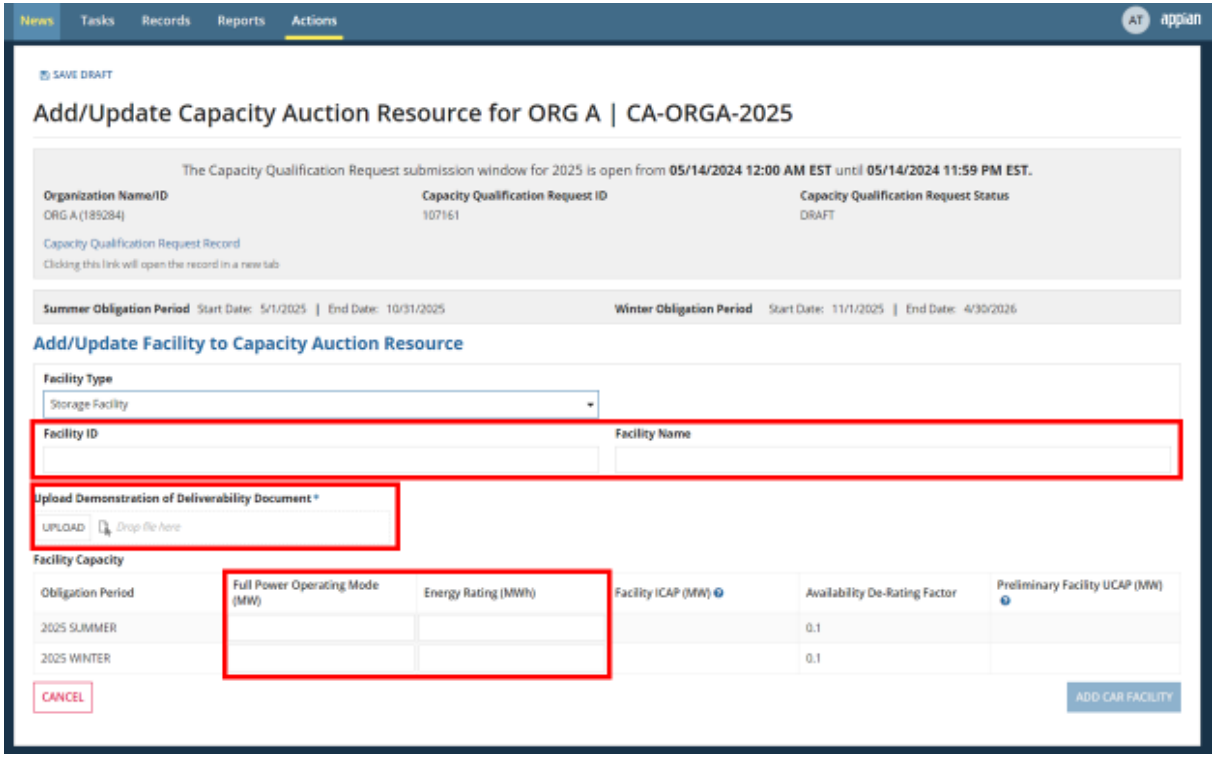
Step	Instruction	Picture
	adjustment factor (PAF) will apply if applicable. Note: The **ICAP** is truncated to one decimal place. The **Preliminary UCAP** is rounded up to one decimal place. Once you have filled out this information, click **Update**. Proceed to Step **11.**	

Step	Instruction	Picture
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**.	

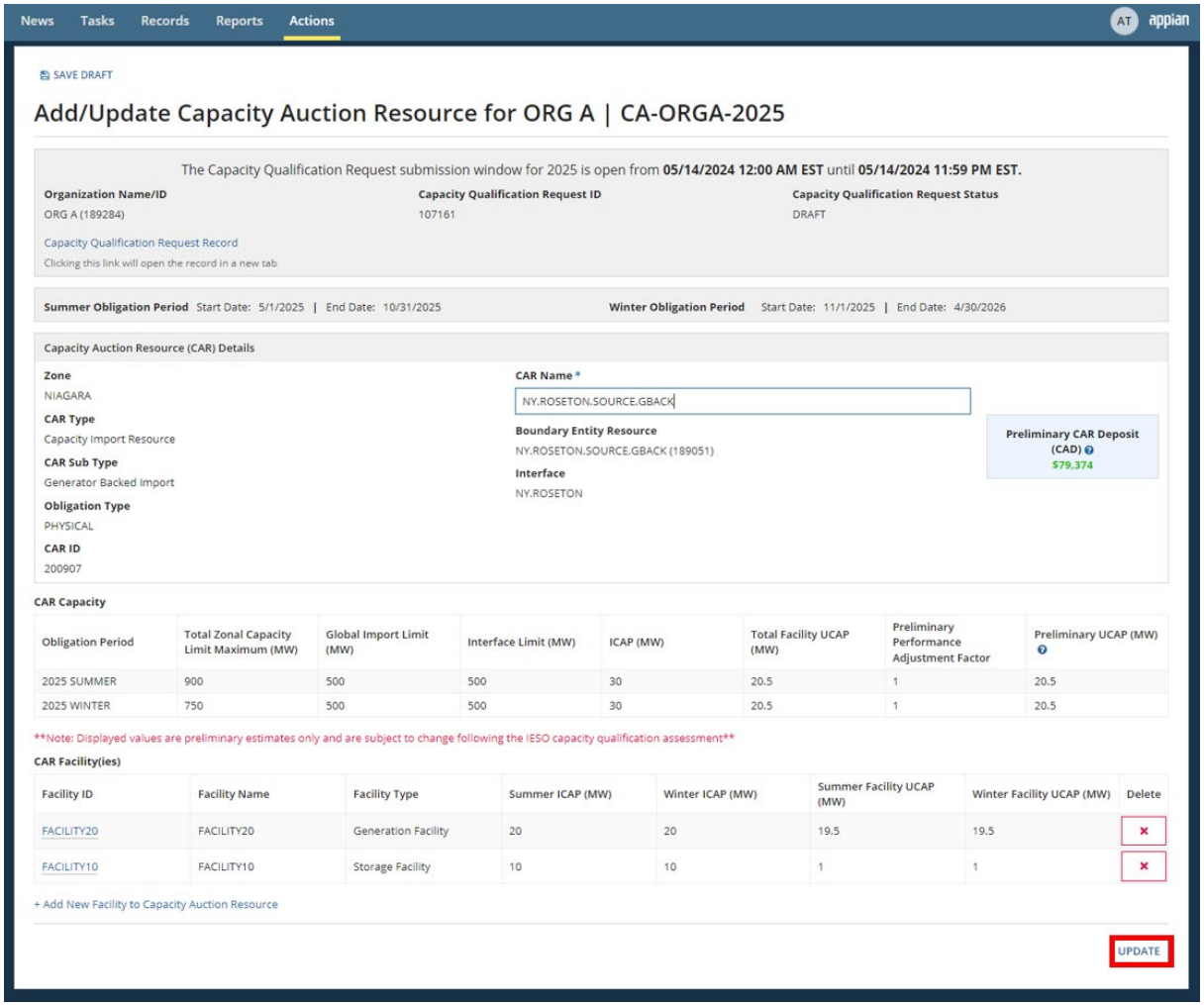
Step	Instruction	Picture
	Proceed to Step **11.**	
8A	Step 8 applies if you are qualifying a **Generator-Backed Import Resource**. If you added a Generator-Backed Import Resource in step 6, you will be directed to this screen where you will need to add one or more generation or storage facilities that 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**	

Step	Instruction	Picture
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.	

Step	Instruction	Picture
	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	

Step	Instruction	Picture
	the resource's availability de-rating factor. Note: The **Facility ICAP** is truncated to one decimal place. The **Preliminary UCAP** is rounded up to one decimal place. 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**.	

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.	

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SAVE DRAFT

Add/Update Capacity Auction Resource for ORG A | CA-ORGA-2025

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

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

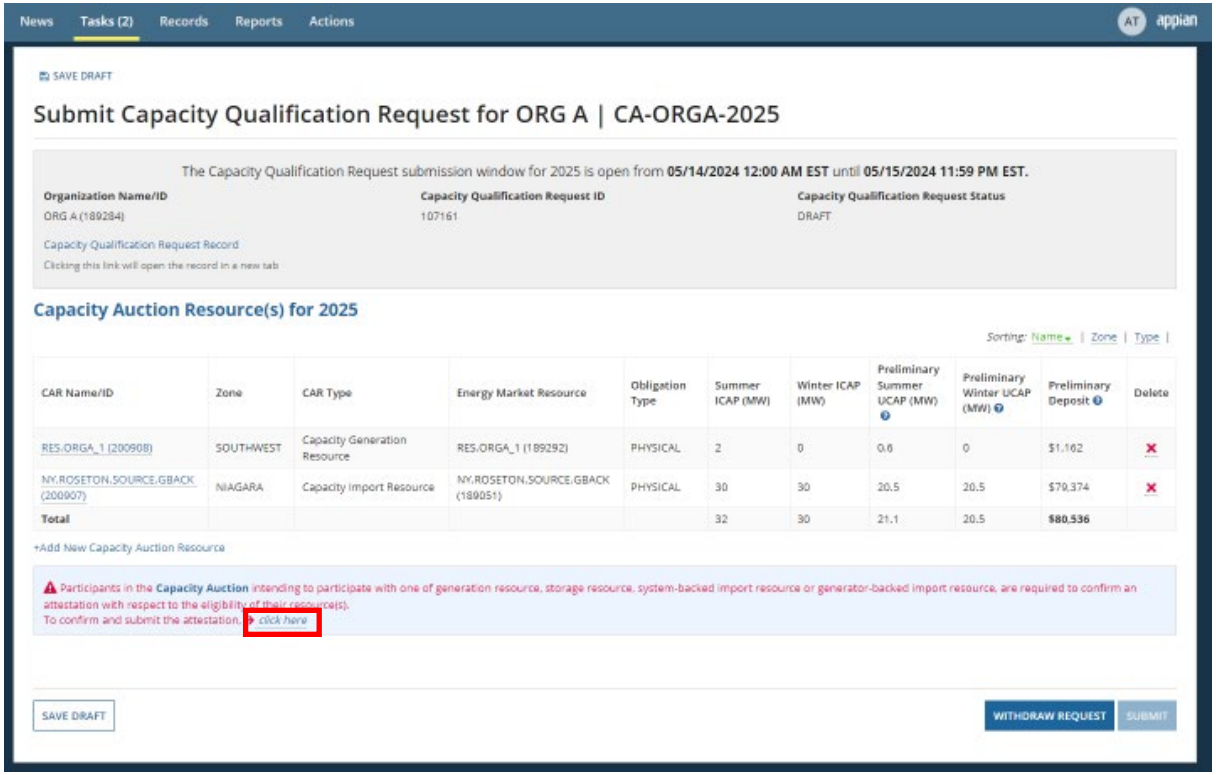
CAR Facility(ies)

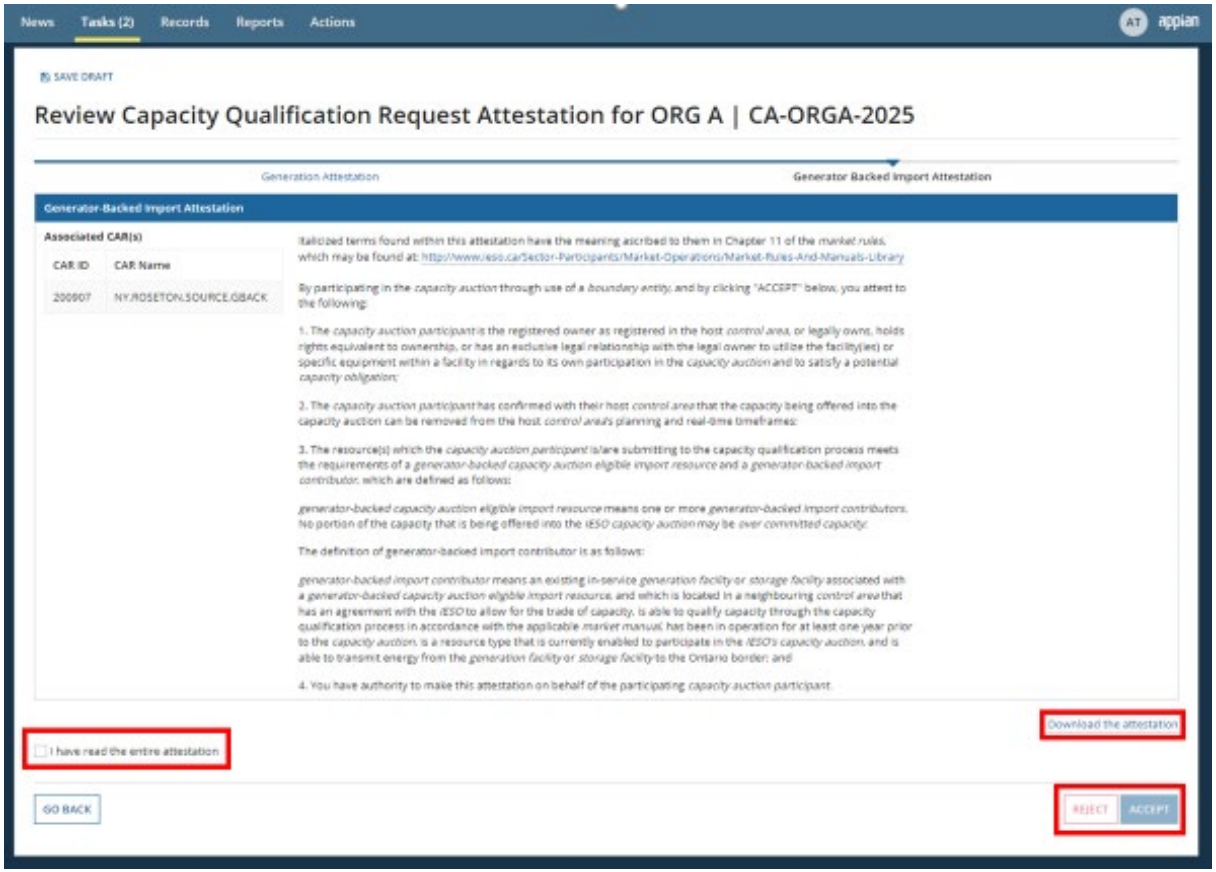
Facility ID	Facility Name	Facility Type	Summer ICAP (MW)	Winter ICAP (MW)	Summer Facility UCAP (MW)	Winter Facility UCAP (MW)	Delete
FACILITY20	FACILITY20	Generation Facility	20	20	19.5	19.5	×
FACILITY10	FACILITY10	Storage Facility	10	10	1	1	×

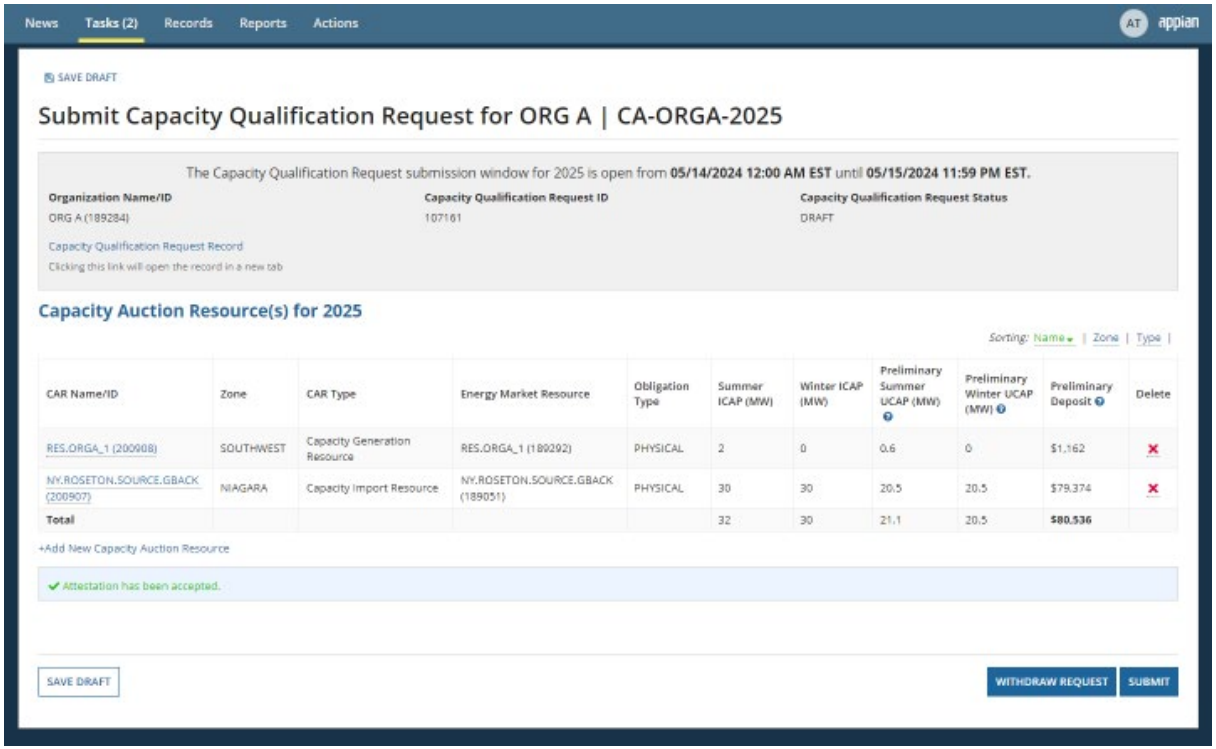
+ Add New Facility to Capacity Auction Resource

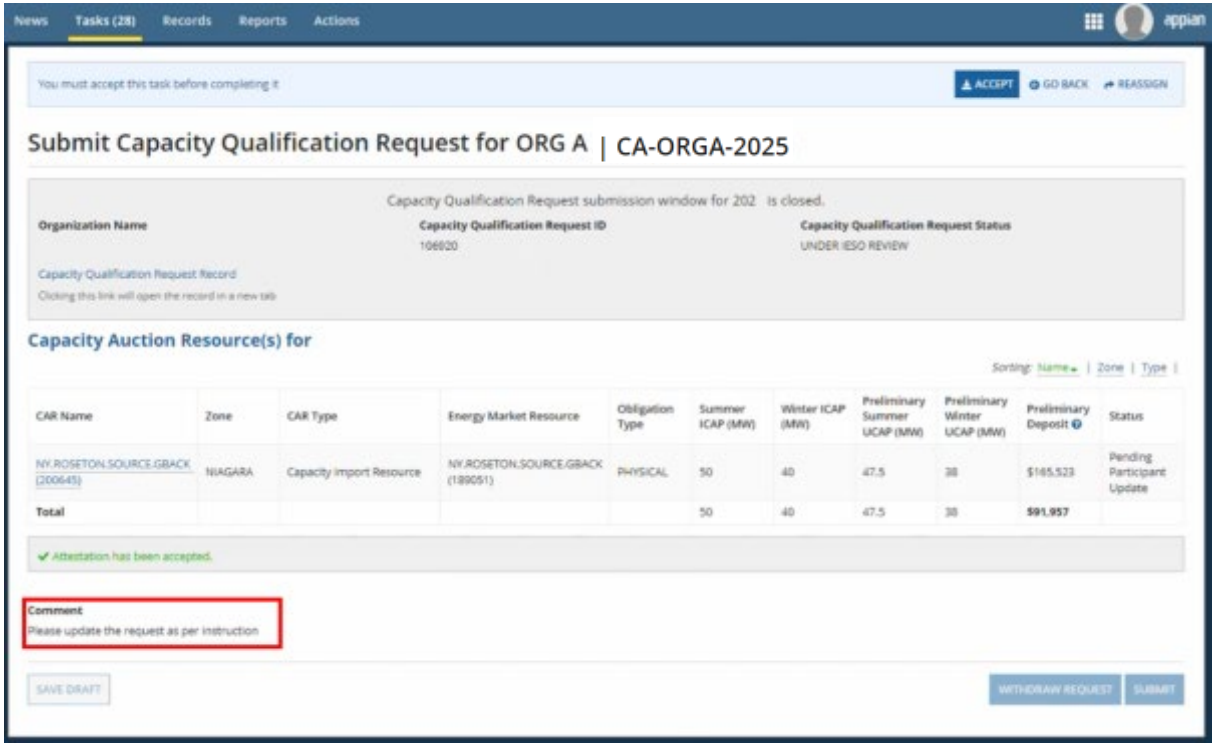
UPDATE

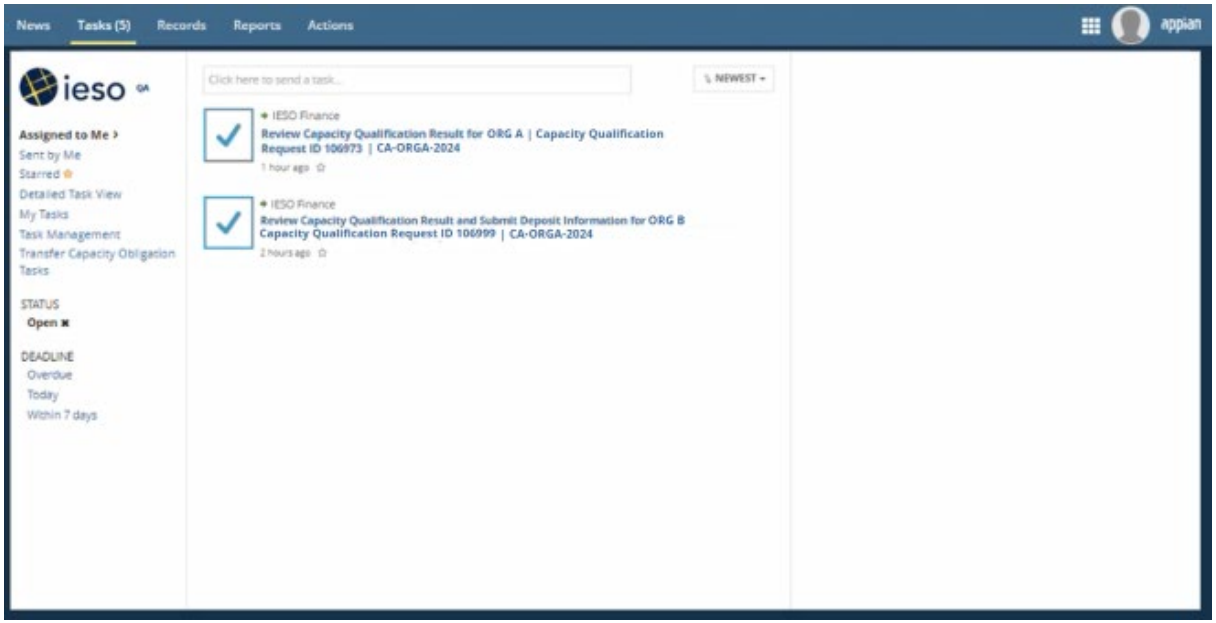
Step	Instruction	Picture
	Note: The maximum value that can be input as ICAP for summer or winter cannot exceed either the **Total Zonal Capacity Limit Maximum, Global Import Limit or Interface Limit** shown in the column(s) to the left of the **ICAP (MW)** column under the CAR Capacity table. Repeat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

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**.	

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
	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
	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.	
15	Once the assessment window has closed, you will receive the following two tasks: • 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

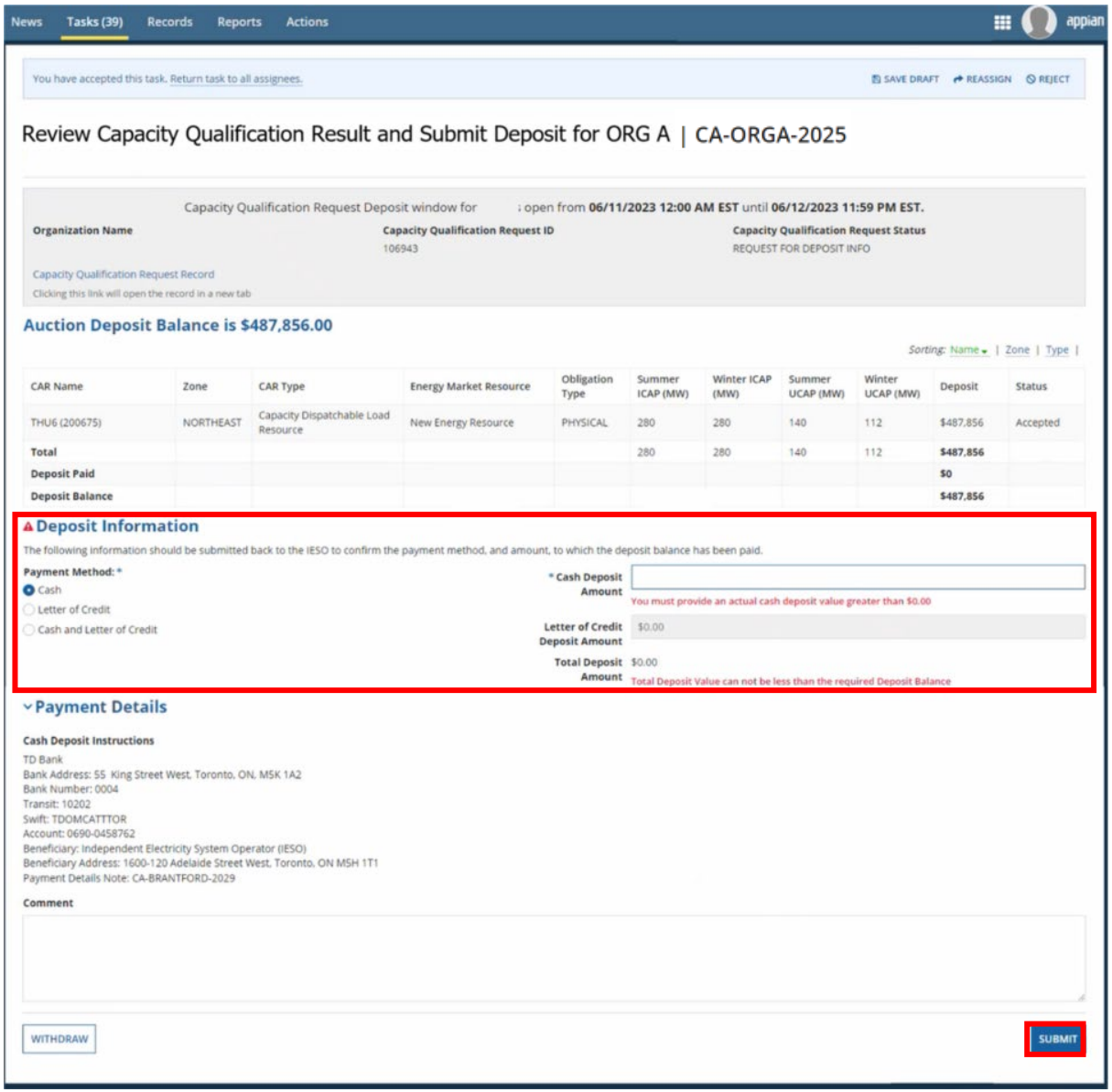
You may review the assessment results here, including the assessed summer UCAP, winter UCAP and assessment status. The deposit required will also be displayed.

You are now required to submit the deposit payment information.

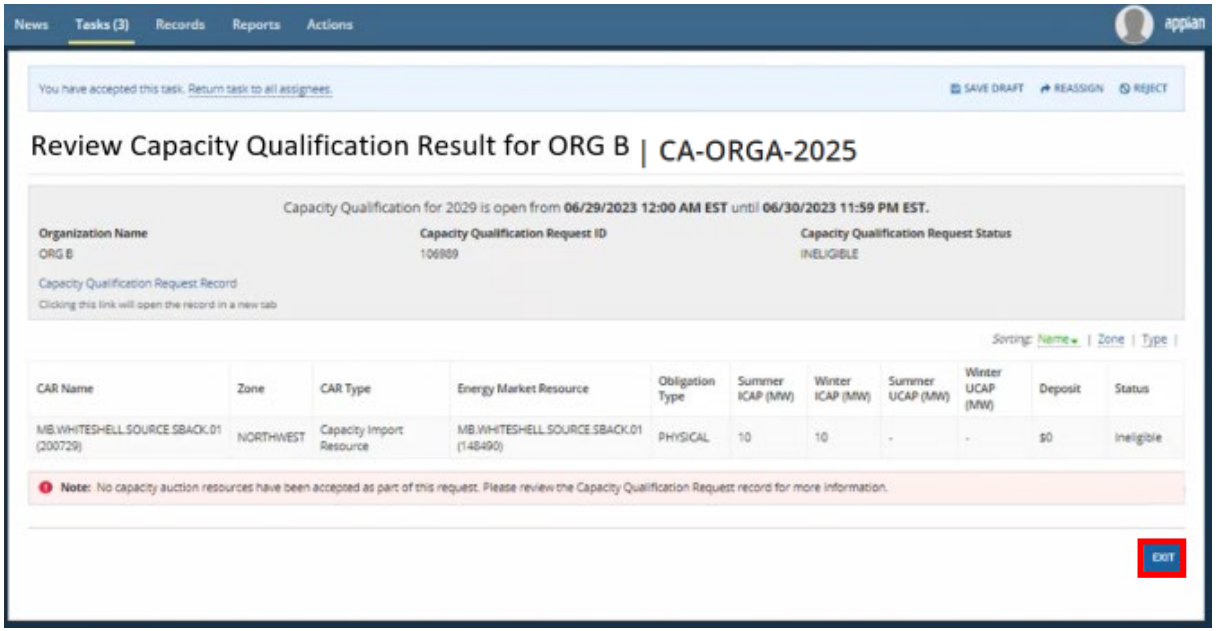
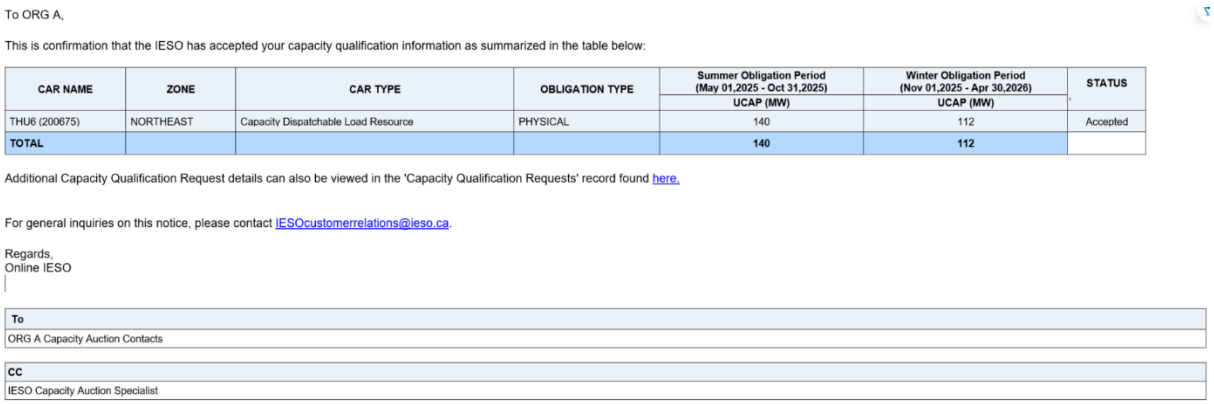
Select the option button corresponding to either **Cash, Letter of Credit** or **Cash and Letter of Credit** to indicate the payment method for your deposit. Additional instructions are displayed for the chosen payment method.

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



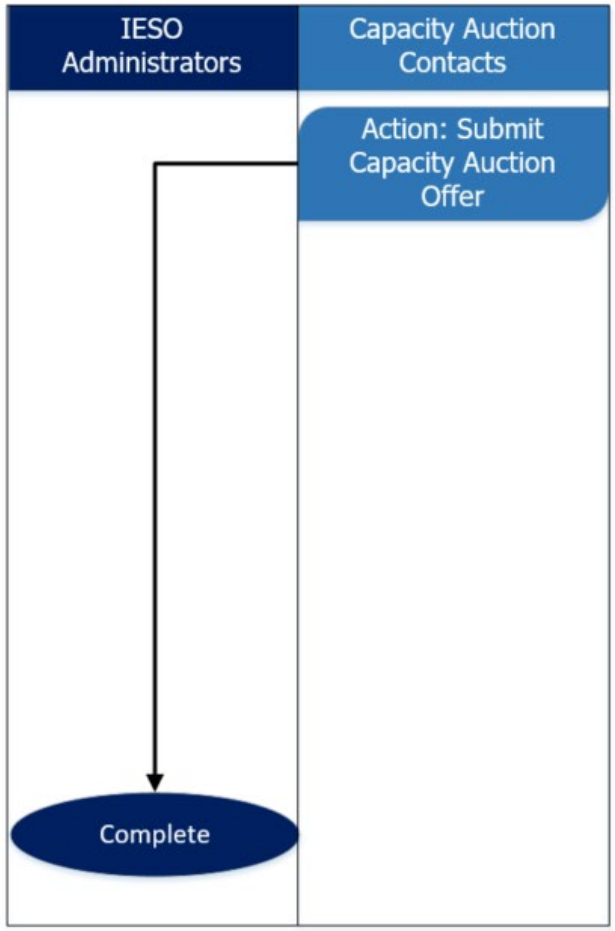
Step	Instruction	Picture
	instructions you will see an item called Payment Details Note: This unique identifier ties the payment to the qualification submission and should be added within the Payment Details field generally found in the payment forms of banking institutions. If you choose **Cash** and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

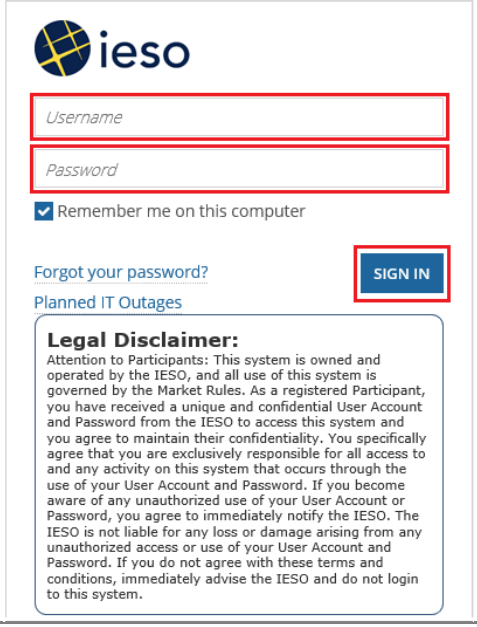
Step	Instruction	Picture
16B	Task: Review Capacity Qualification Result You may click into the task to review the assessment results. No additional action is required as part of this task. Click **Exit**.	
17	The IESO will review and confirm the submitted deposit. If additional information is required, 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	

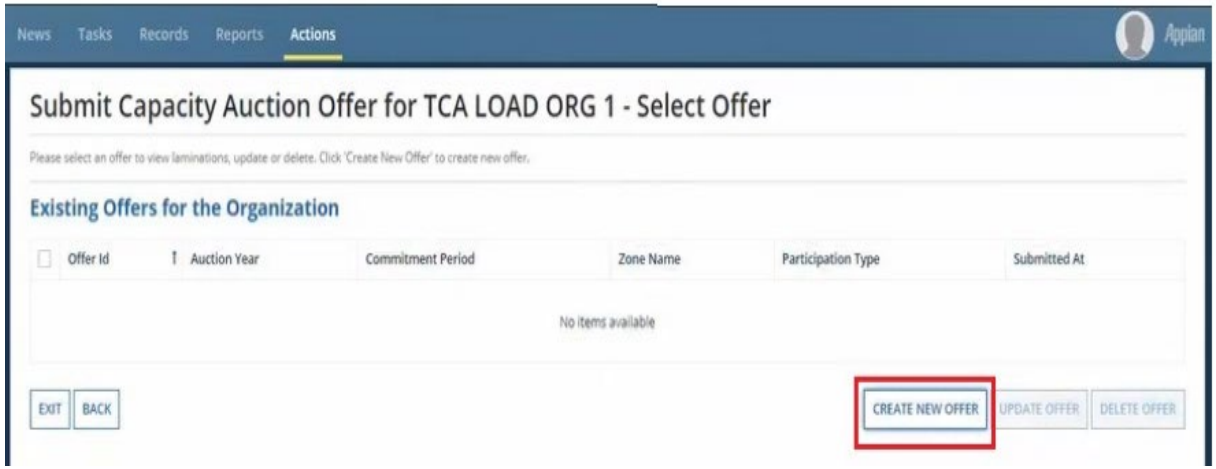
Step	Instruction	Picture
	under the **Capacity Qualification Requests** record found in the Records tab in Online IESO. You are now qualified to submit offers into the Capacity Auction.	

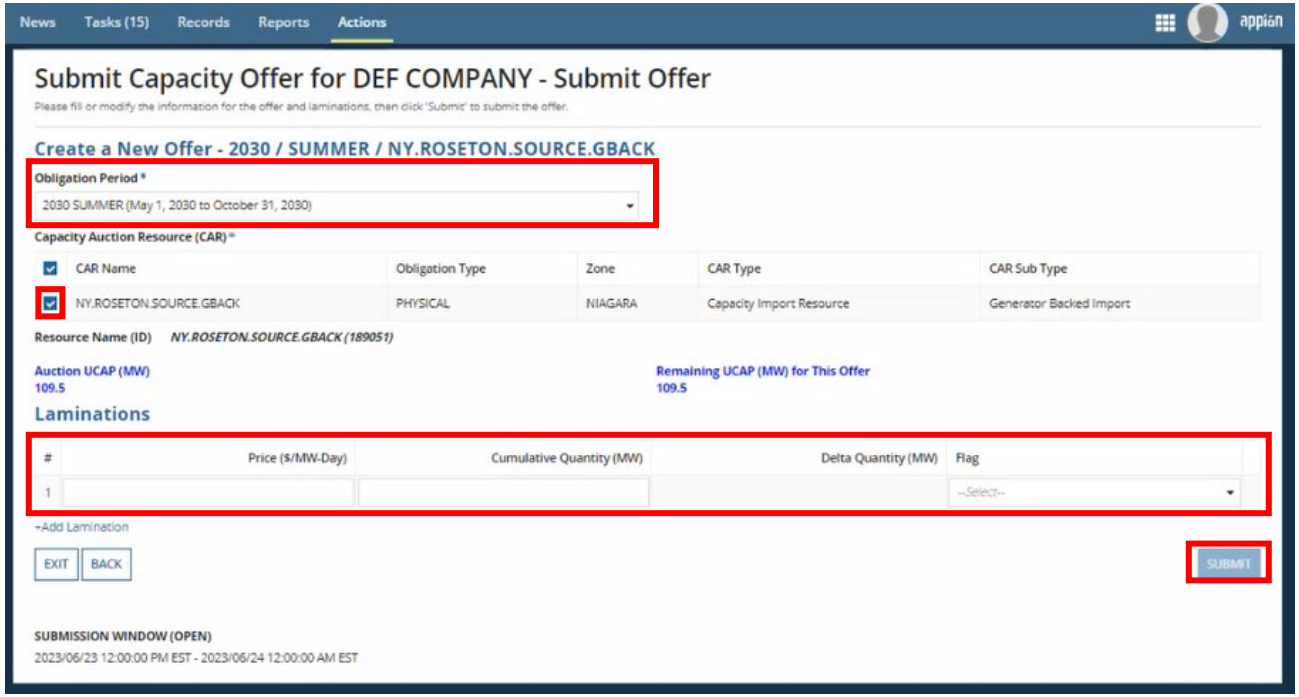
3. How to Offer Capacity

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.



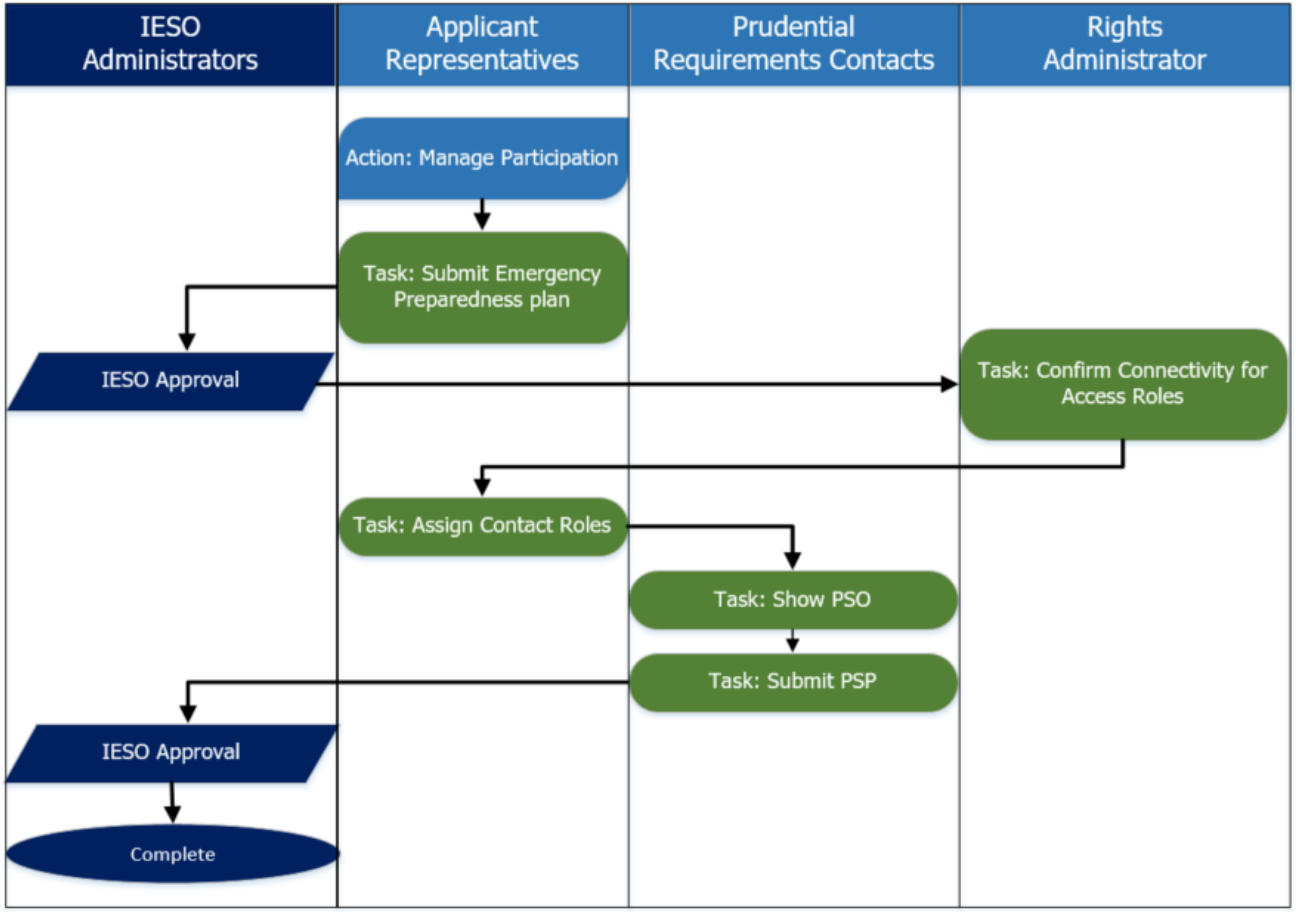
Step	Instruction	Picture
1	Action: Submit Capacity Auction Offer The person in your organization registered as the Capacity Auction Contact should log in to the Online IESO web-based registration system using this link. Enter your Username and Password and click **Sign In**.	
2	Click **Actions** on the menu bar at the top of the screen. Click **Submit Capacity Auction Offer** from the list of available action items displayed on the subsequent screen.	

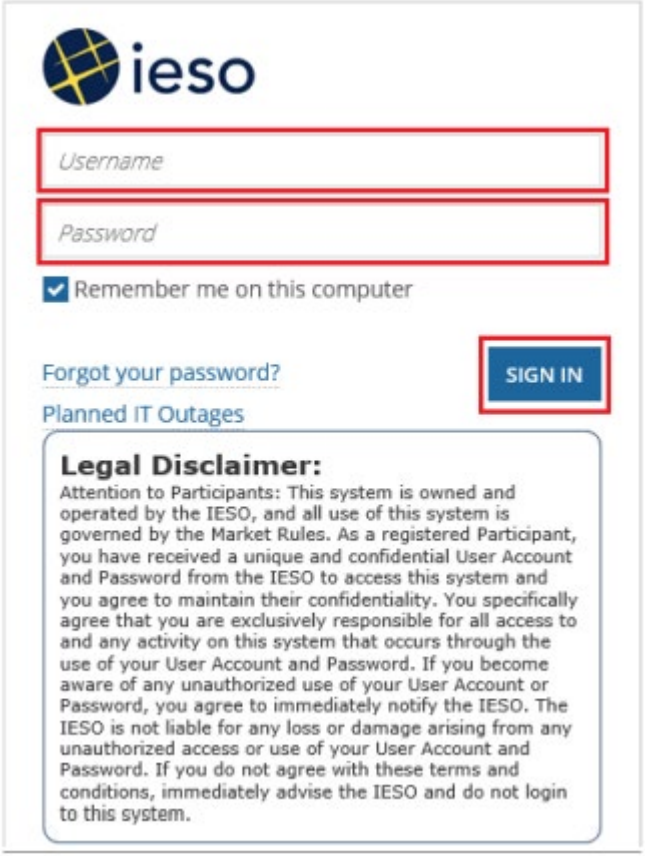
Step	Instruction	Picture
3	The **Submit Capacity Auction Offer – Select Organization** screen is displayed. Select the option button corresponding to the desired organization, and click **Continue**.	
4	A list of existing offers for your organization, if any, is displayed. You have the option to either update any of these existing offers, or create a new offer. To create a new offer, click **Create New Offer**.	

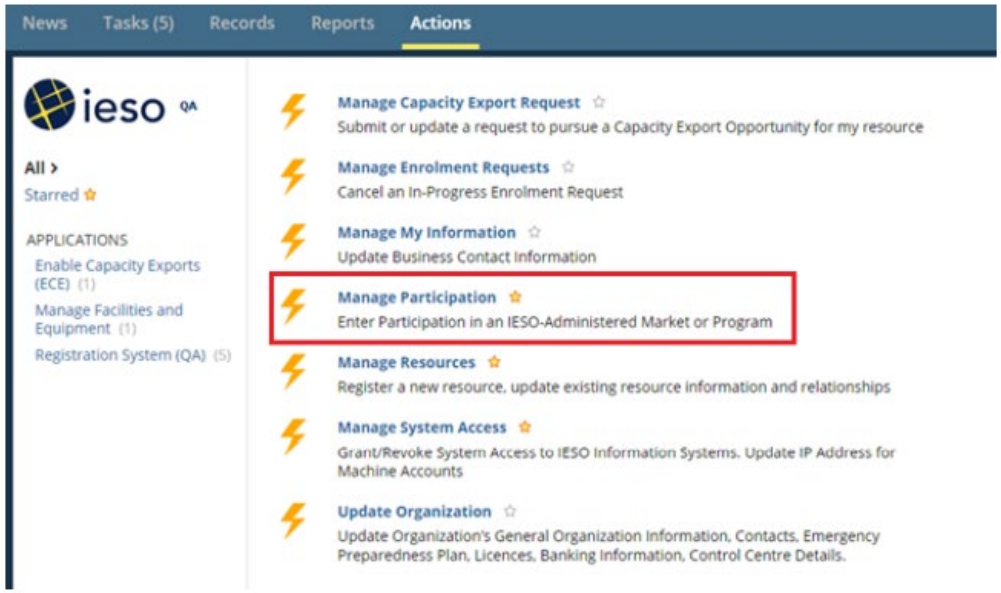
Step	Instruction	Picture
5	Select the desired Obligation Period (i.e., Summer or Winter), from the **Obligation Period** drop down list. Only Obligation Periods that a resource has capacity qualified for will appear in the drop down list. Select the **Capacity Auction Resource** for which you wish to 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

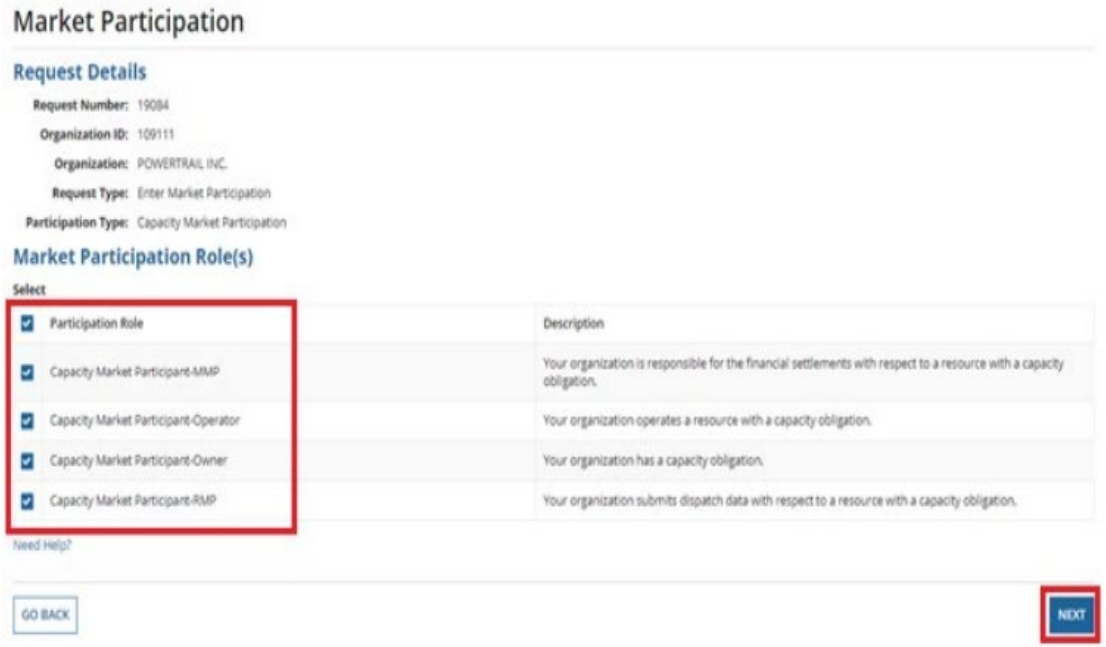
The following flow chart and table provides step-by-step instructions, with accompanying screen captures, describing how to become authorized as a Capacity Market Participant (CMP) using the Online IESO web-based registration system.

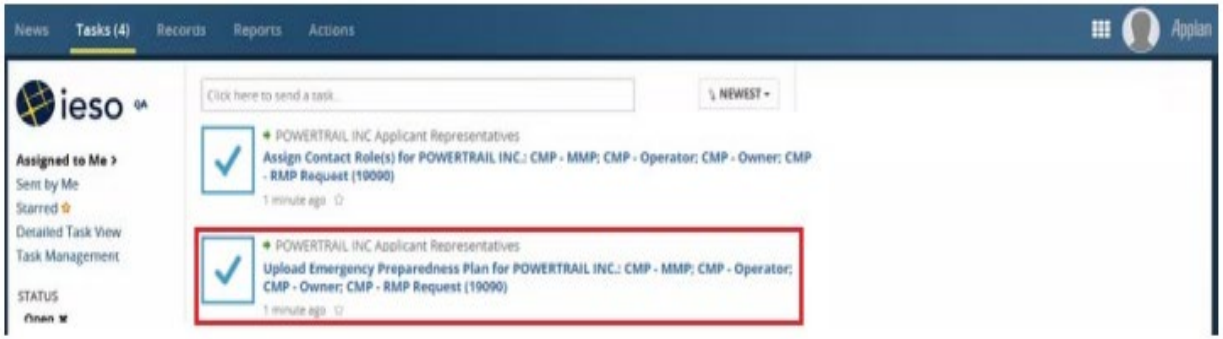


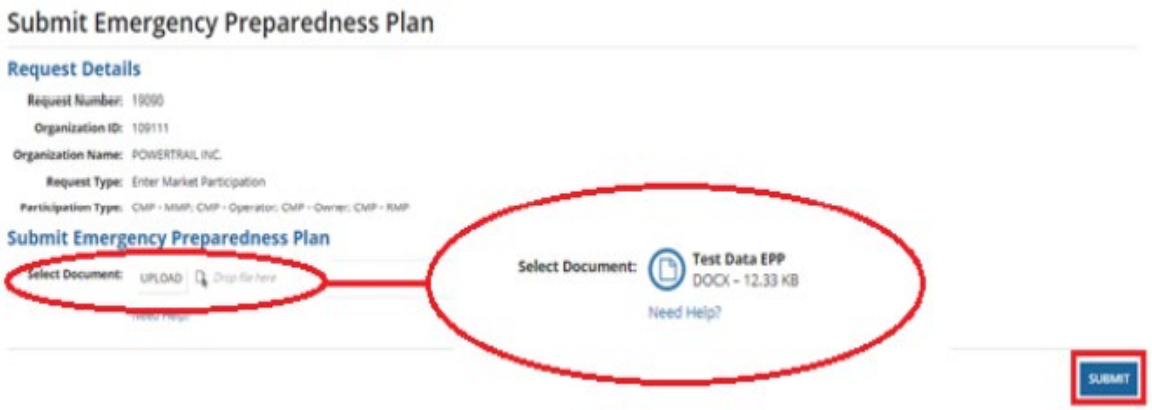
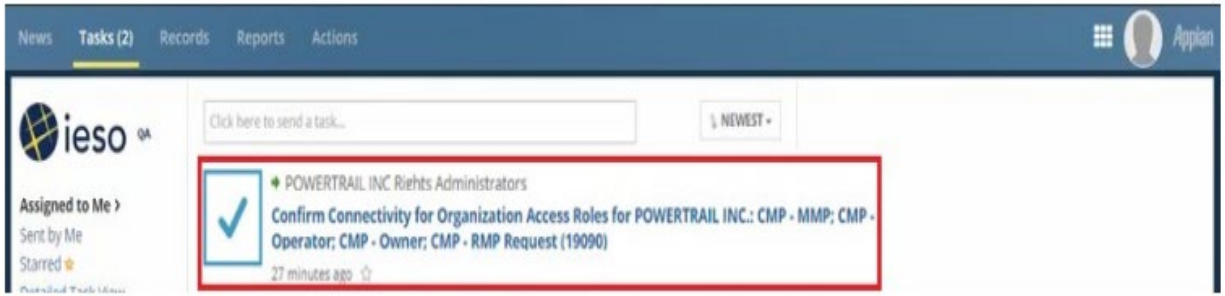
Step	Instruction	Picture
1	Action: Manage Participation Log in to the Online IESO web-based registration system using this link. Enter your Username and Password, and click **Sign In**.	

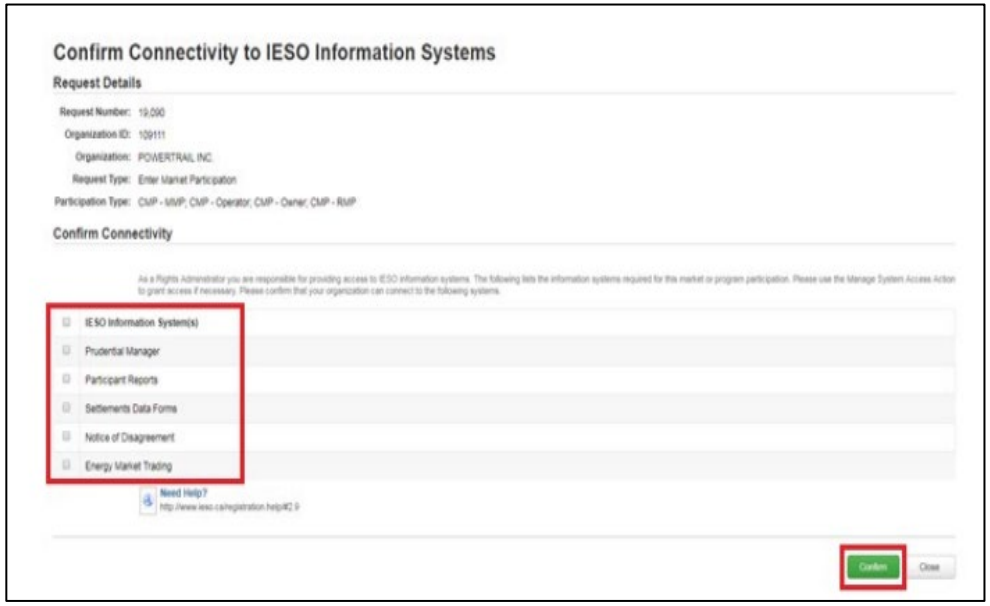
Step	Instruction	Picture
2	Click **Actions** on the menu bar at the top of the screen. Click **Manage Participation** from the list of available action items displayed on the subsequent screen.	
3	The **Choose Organization** screen is displayed. Select the check box corresponding to the organization that you wish to become authorized as a Capacity Market Participant (CMP), and click **Next**.	

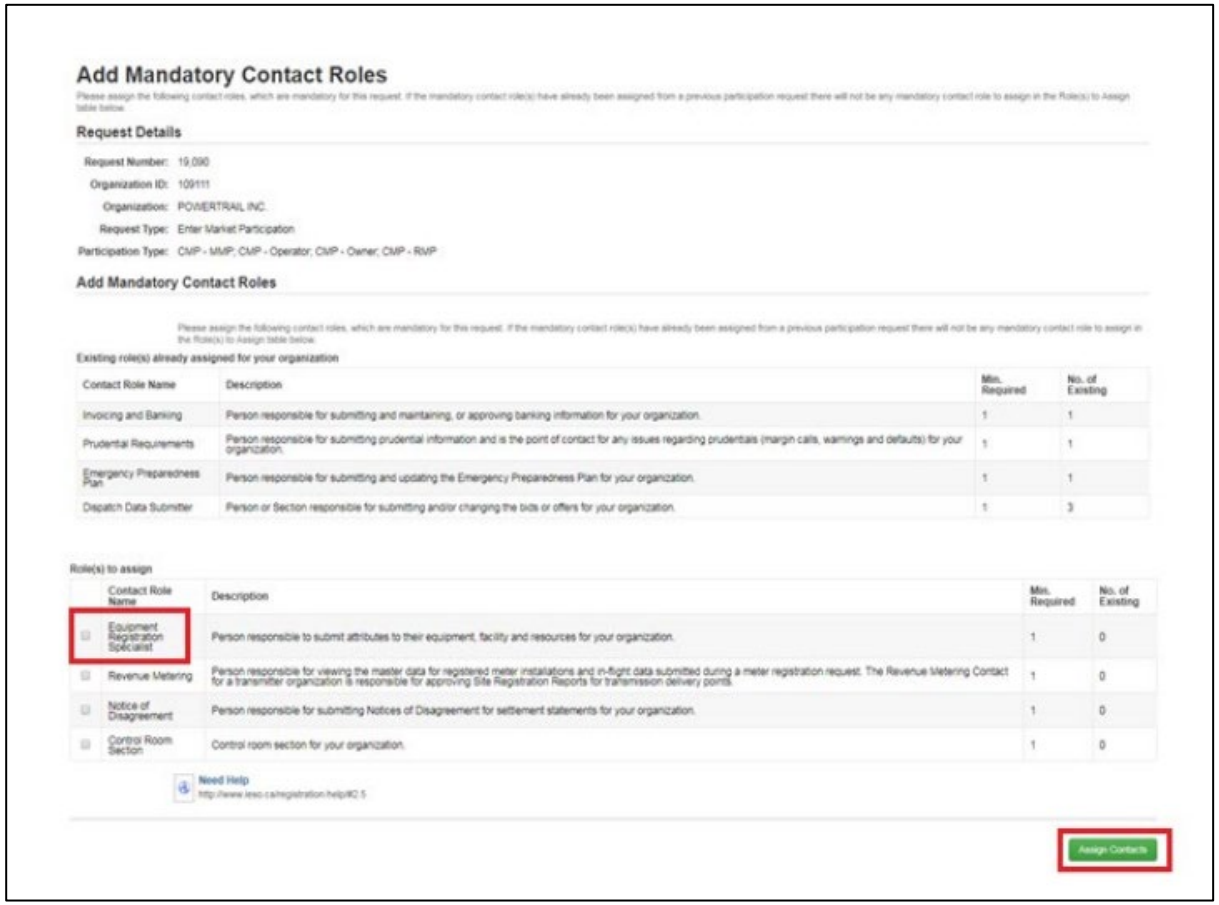
Step	Instruction	Picture
4	The Select **Participation Type** screen is displayed. In the **Action** to **Complete** drop -down list, select **Enter Market Participation**, and click Next.	
5	The **Market Participation** screen is displayed. In the **Market Participation Type** drop -down list, select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

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	Online IESO automatically determines the next steps and displays these steps on the **Required Tasks** to Complete screen (depending on the roles selected). Make note of these tasks, and click **Proceed**. These tasks will also be shown on the News screen. Note: If you are new organization to IESO you will be required to submit the entire next set of required tasks.	
8	Task: Submit Emergency Preparedness Plan Click **Tasks** on the menu bar at the top of the screen. Click **Upload Emergency Preparedness Plan** for from the list of available tasks displayed on the subsequent screen. Click **Yes** to confirm that you accept the task.	

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.	

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: 19,090
Organization ID: 109111
Organization: POWERTRAIL INC.
Request Type: Enter Market Participation
Participation Type: CMP - MMP; 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

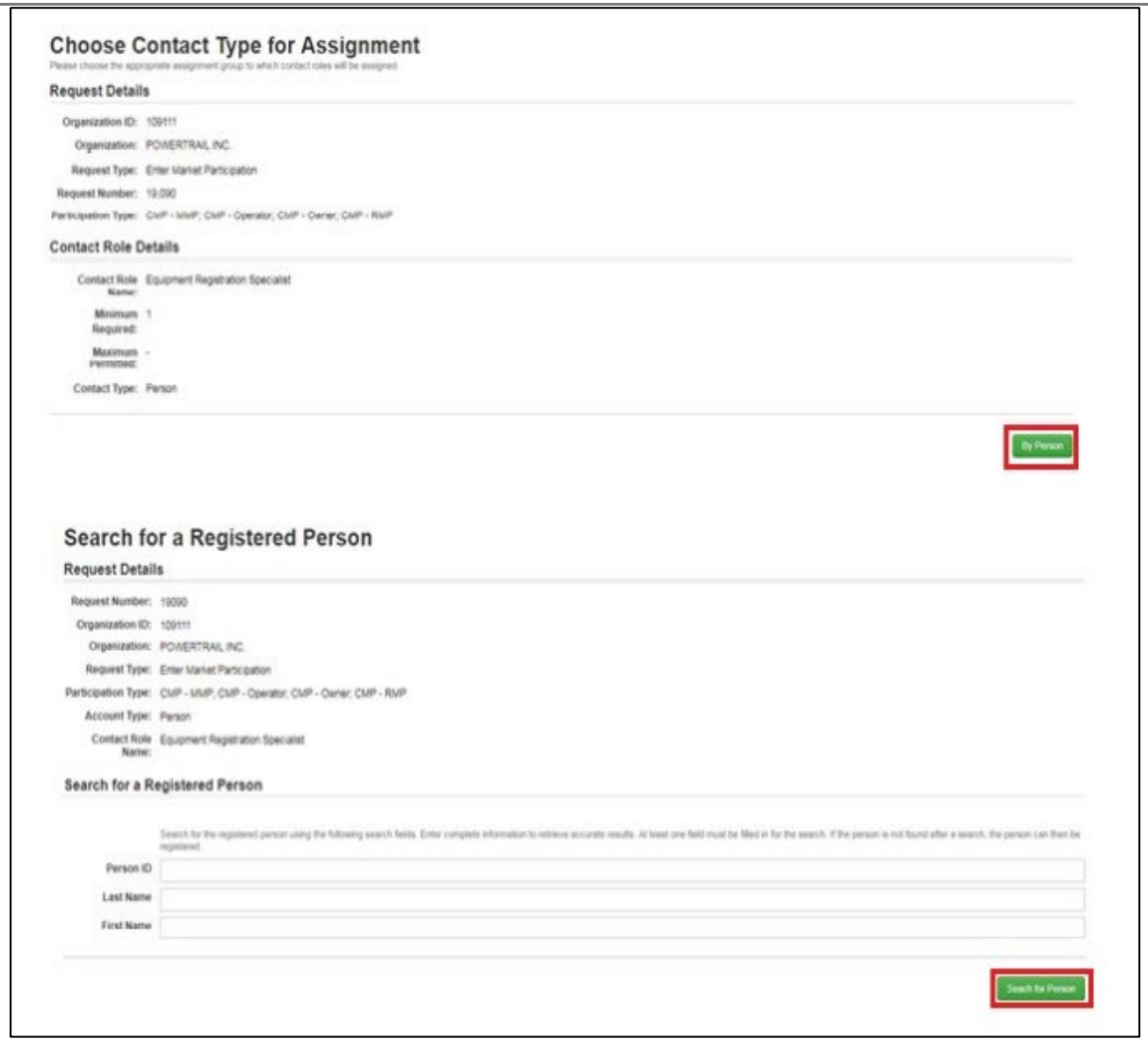
Contact Role Name	Description	Min. Required	No. of Existing
Invoicing and Banking	Person responsible for submitting and maintaining, or approving banking information for your organization.	1	1
Prudential Requirements	Person responsible for submitting prudential information and is the point of contact 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
Dispatch Data Submitter	Person or Section responsible for submitting and/or changing the bids or offers for your organization.	1	3

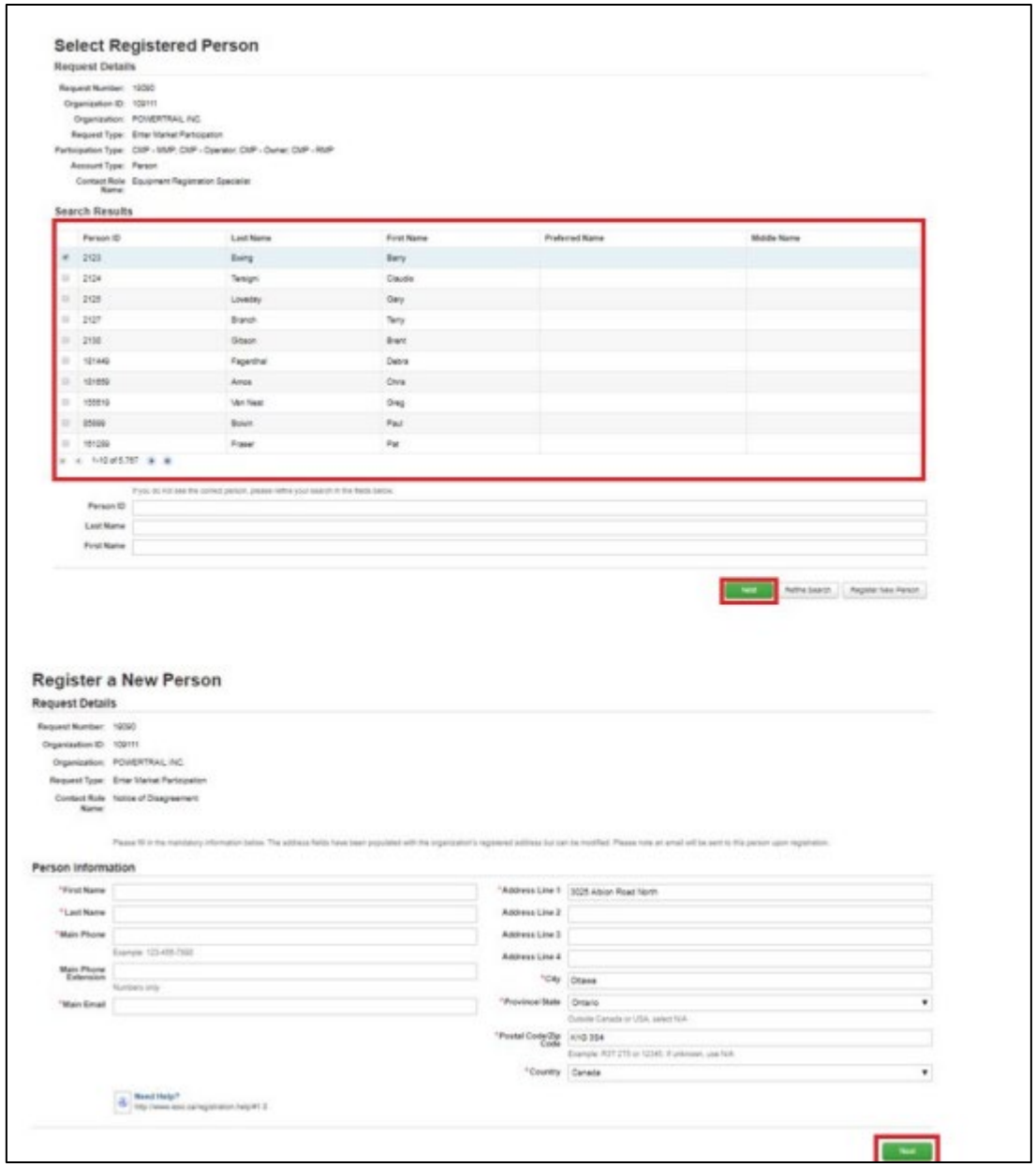
Role(s) to assign

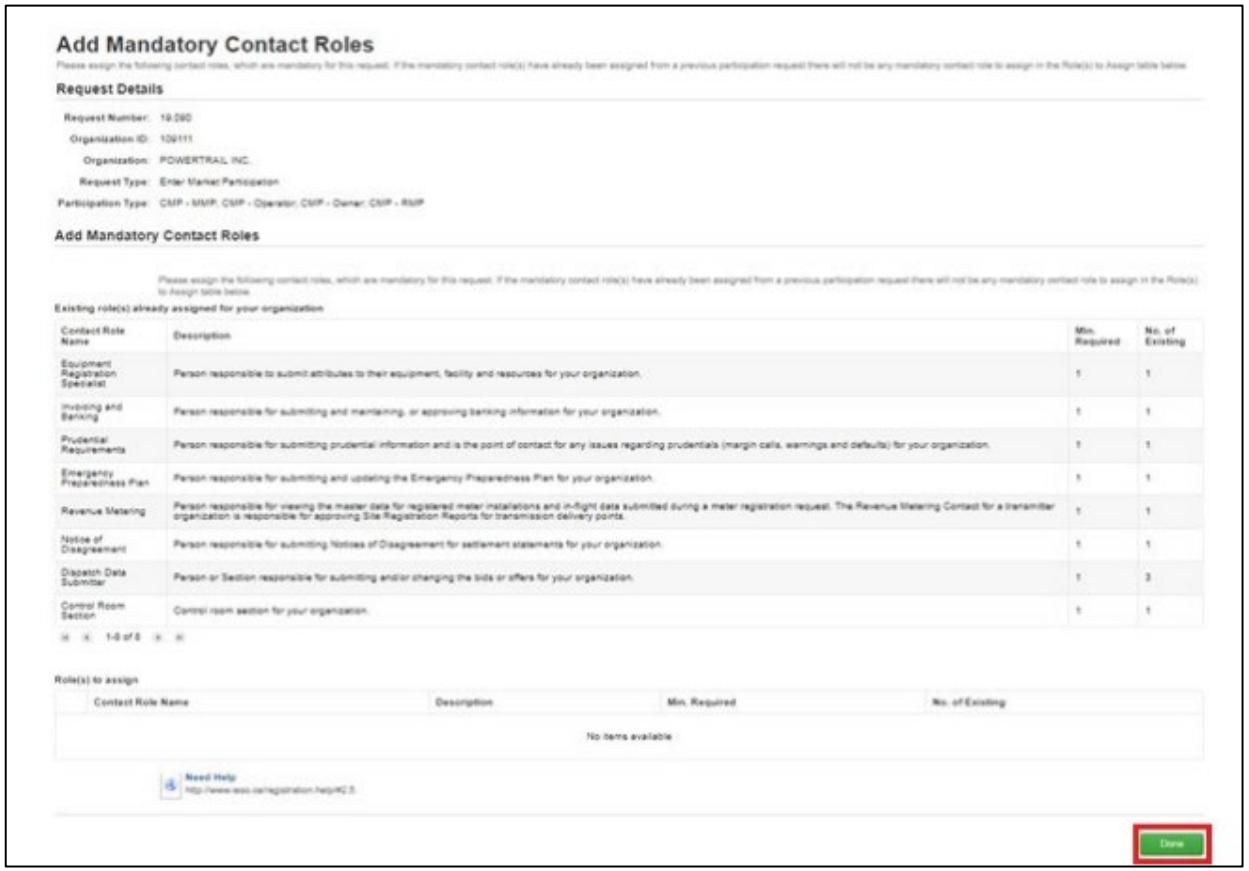
	Contact Role Name	Description	Min. Required	No. of Existing
☐	Equipment Registration Specialist	Person responsible to submit attributes to their equipment, facility and resources for your organization.	1	0
☐	Revenue Metering	Person responsible for viewing the master data for registered meter installations 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	0
☐	Notice of Disagreement	Person responsible for submitting Notices of Disagreement for settlement statements for your organization.	1	0
☐	Control Room Section	Control room section for your organization.	1	0

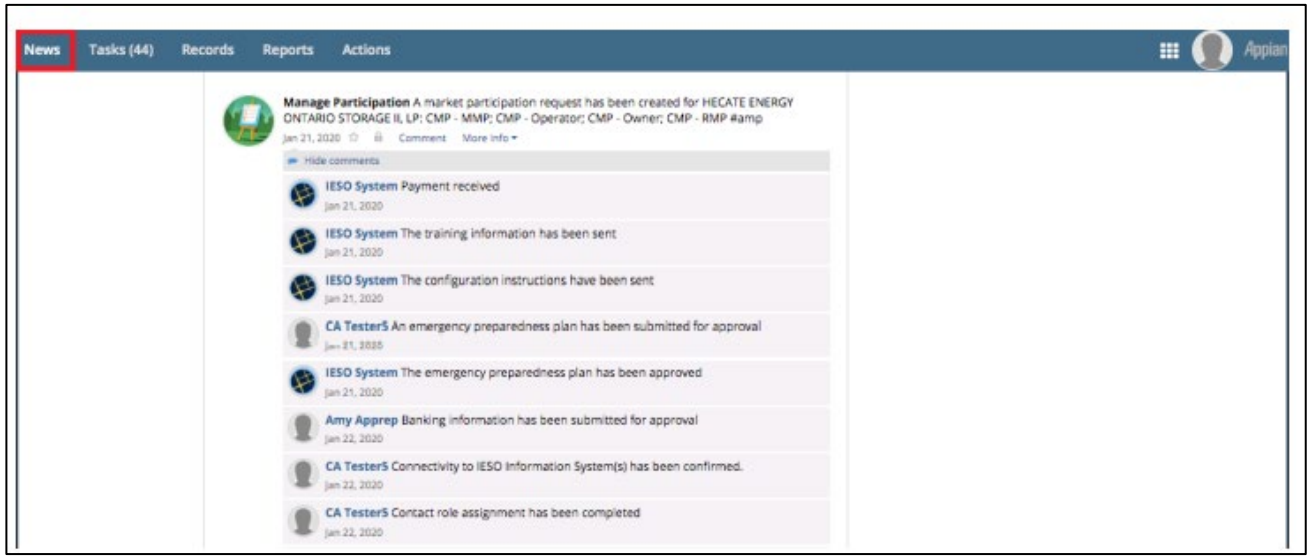
Need Help
http://www.ieso.ca/registration-help/#2.5

Assign Contacts

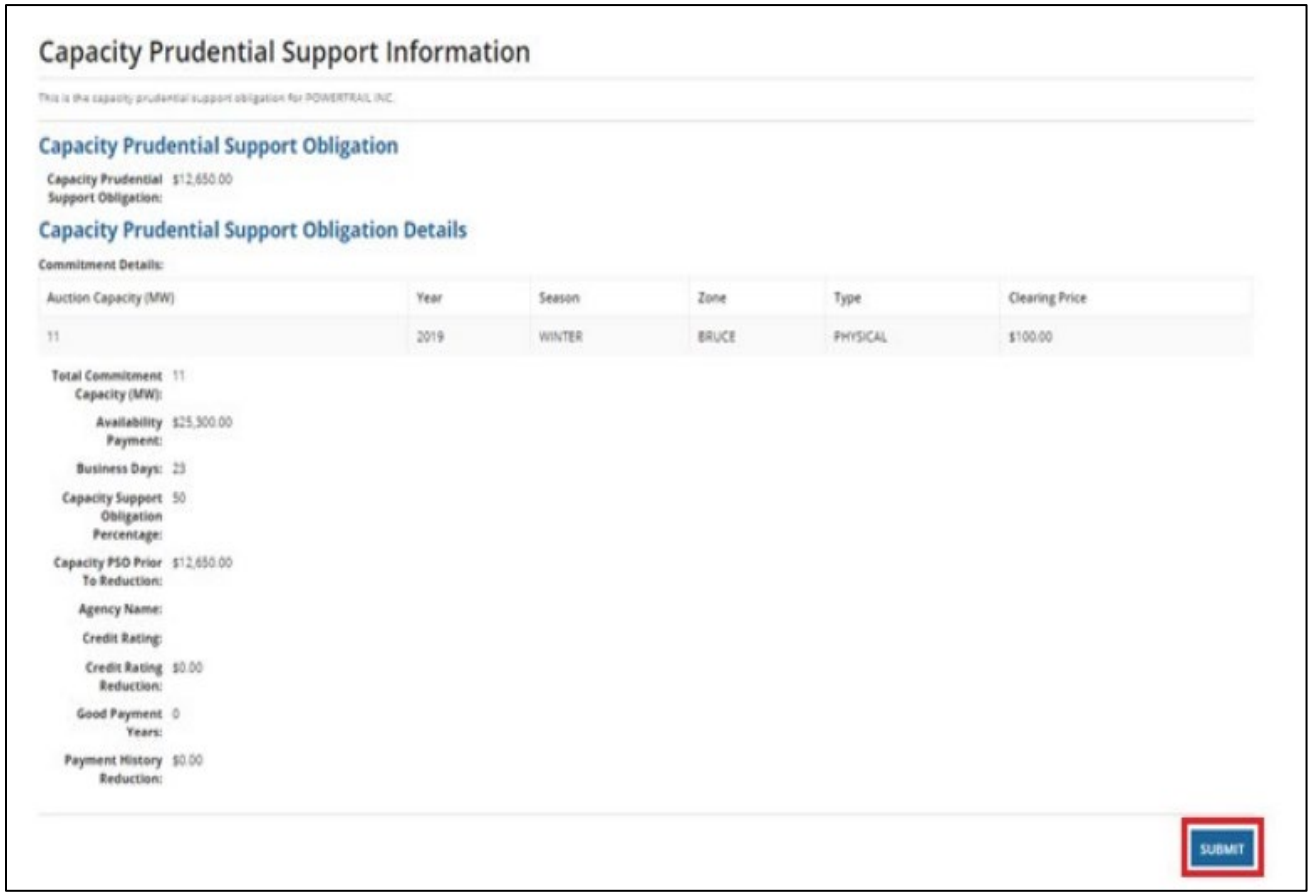
Step	Instruction	Picture
14	The **Choose Contact Type** for **Assignment** screen is displayed – review and click by Person. Click **Search for Person** to search for a person registered in the IESO database.	

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**.	

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**.	

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: $25,300.00

Business Days: 23

Capacity Support Obligation Percentage: 50

Capacity PSO Prior To Reduction: $12,650.00

Agency Name:

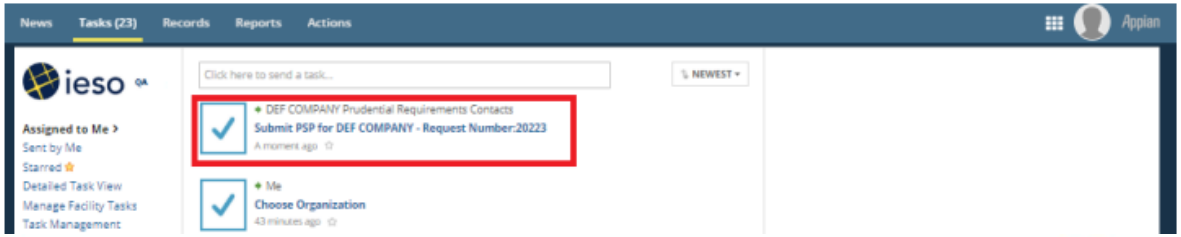
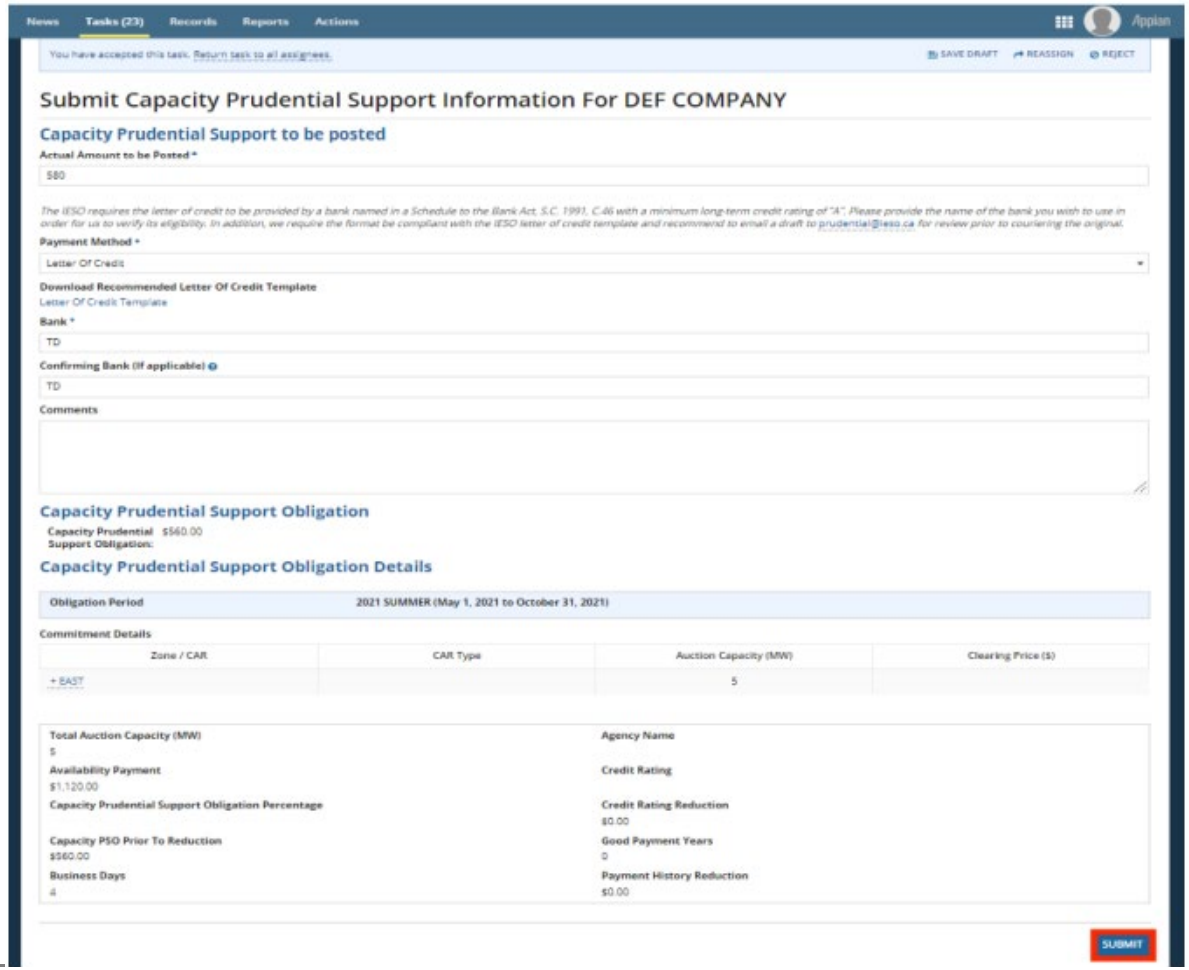
Credit Rating:

Credit Rating Reduction: $0.00

Good Payment Years: 0

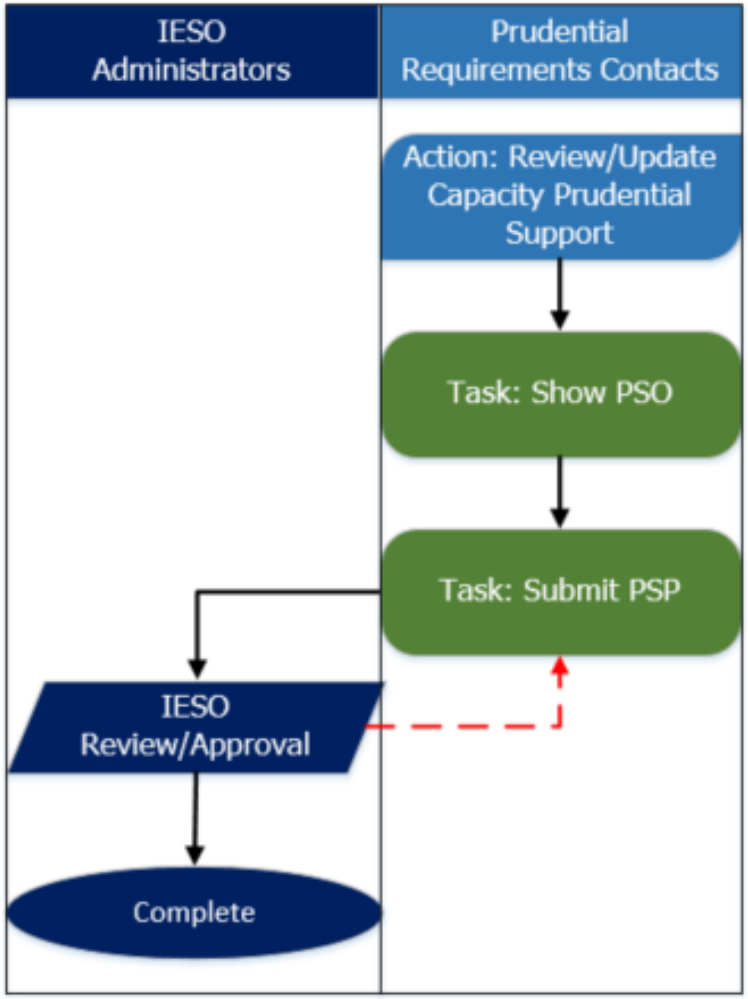
Payment History Reduction: $0.00

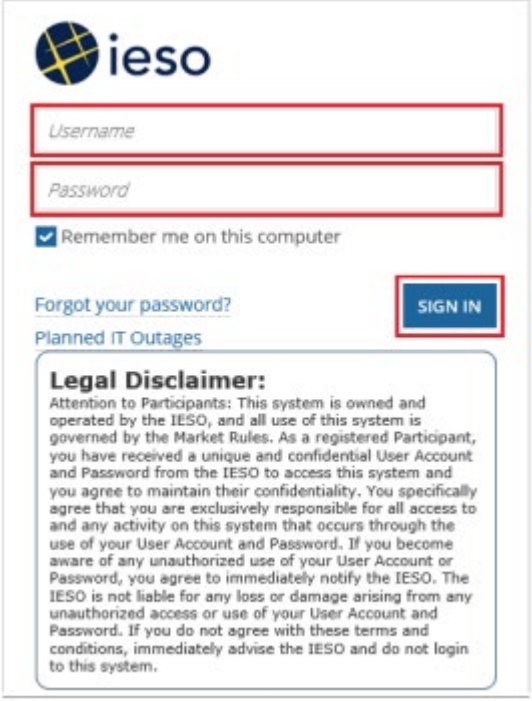
SUBMIT

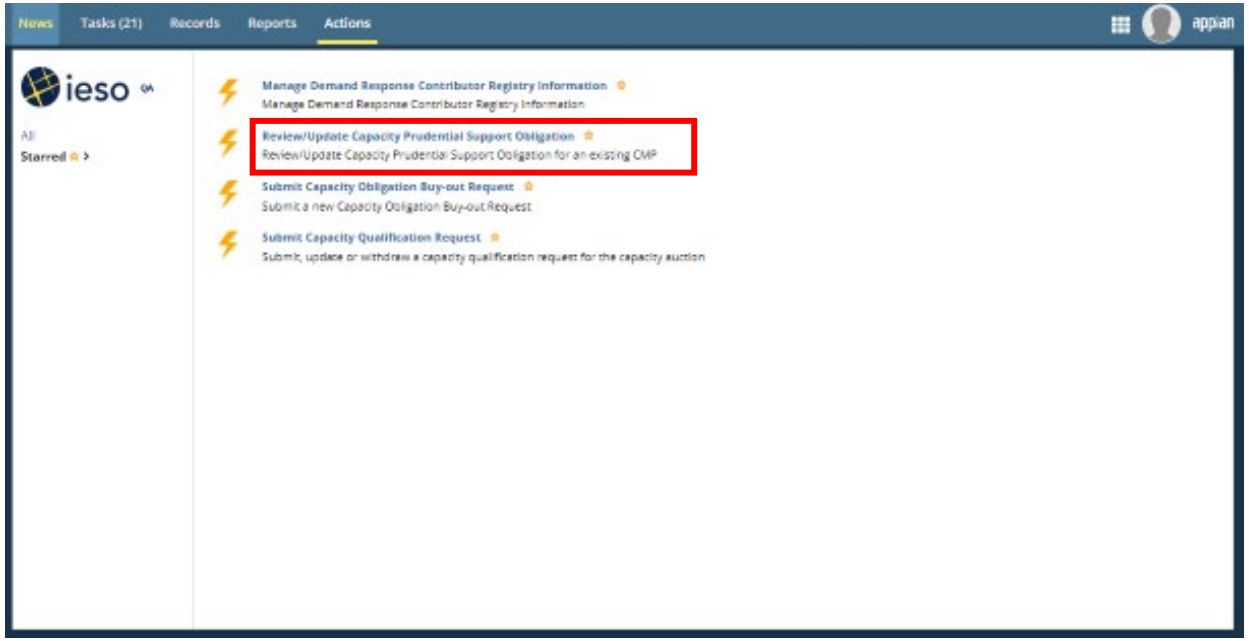
Step	Instruction	Picture
21	Task: Submit PSP (Prudential Support Posted) Click **Tasks** on the menu bar at the top of the screen. Click **Submit PSP for <your organizations>** from the list of available tasks displayed on the subsequent screen. Enter the required prudential support obligation amount 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.	 

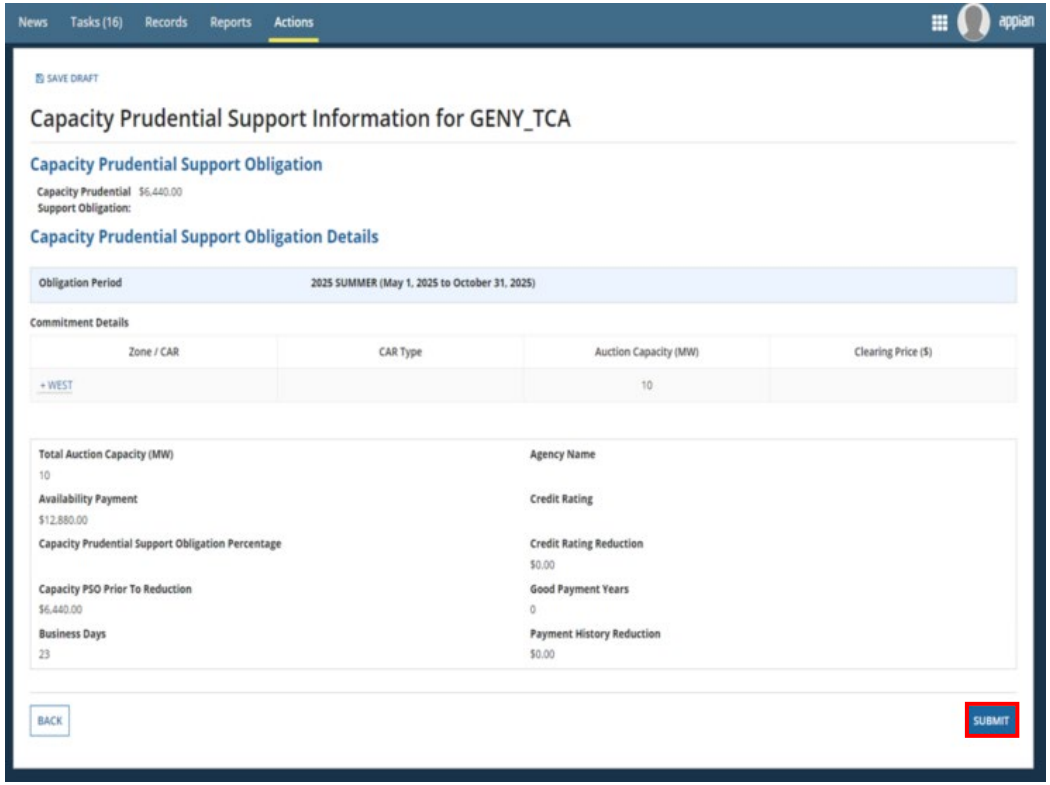
5. How to Review/Update Capacity Prudential Support

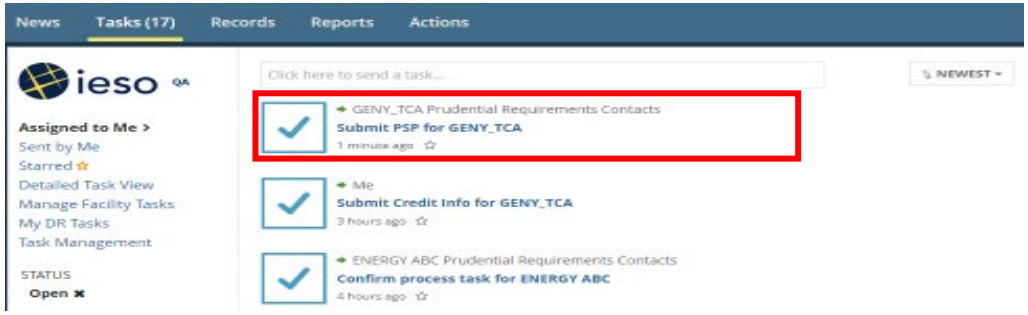
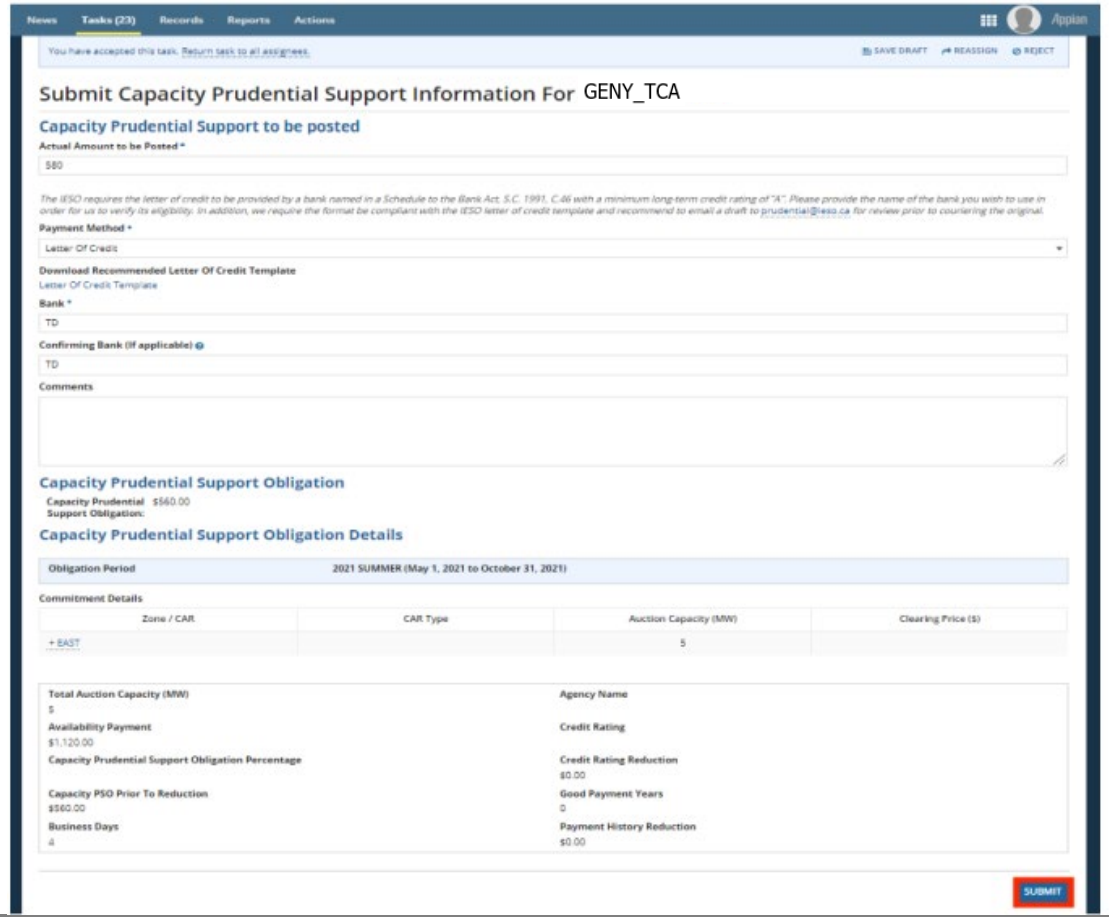
The following chapter provides step-by-step instructions, with accompanying screen captures, describing the process for reviewing/updating capacity prudential support using the Online IESO web-based system.



Step	Instruction	Picture
1	Action: Review/Update Capacity Prudential Support. Log in to the Online IESO web-based registration system using this link. Enter your Username and Password and click **Sign In**.	

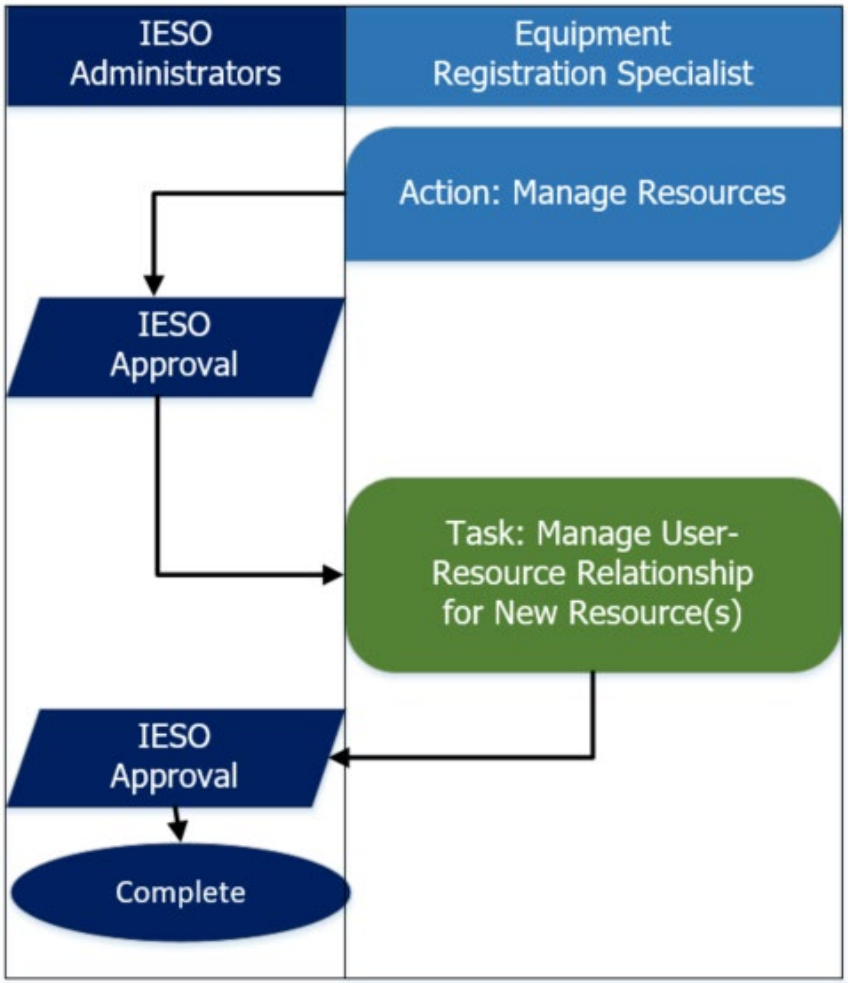
Step	Instruction	Picture
2	Click **Actions** on the menu bar at the top of the page. Select **Review/Update Capacity Prudential Support Obligation** from the list of available action items displayed on the subsequent screen.	

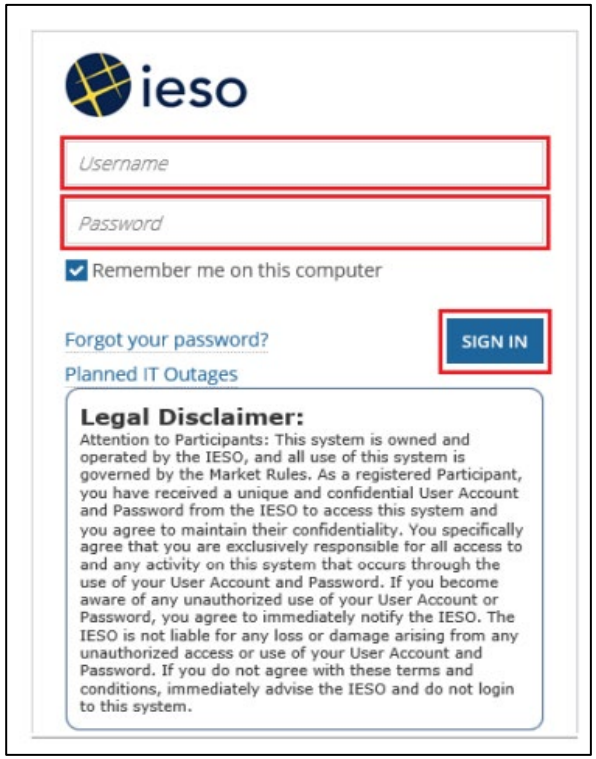
Step	Instruction	Picture
3	On the following screen, the **Capacity Prudential Support Information** screen is displayed and displays the estimated PSO amount for the upcoming obligation. If your existing prudential support covers the required amount, then click **Back**. No additional action is required. 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.	 

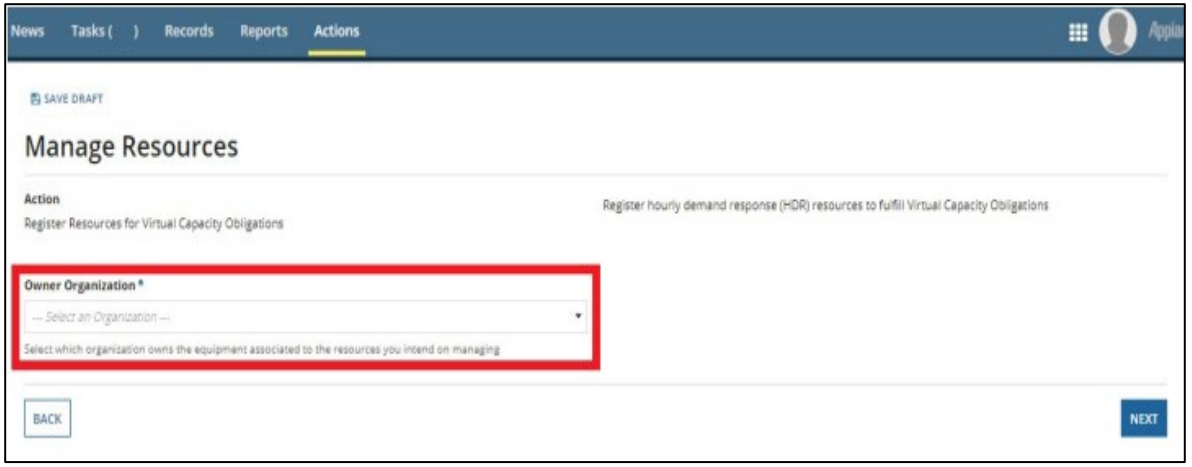
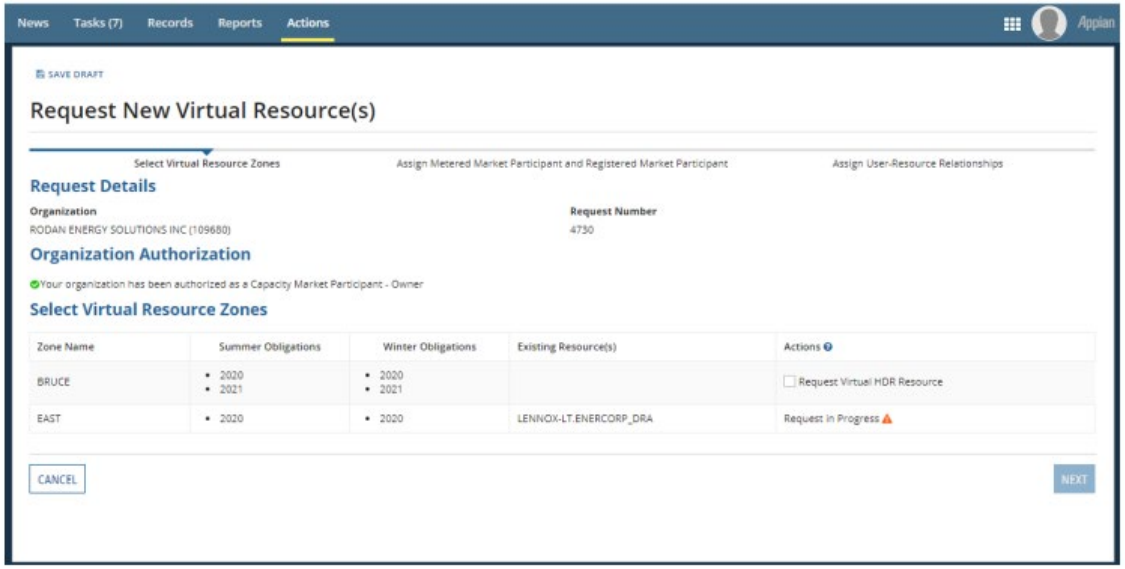
6. How to Register a Virtual Demand Response Resource

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.

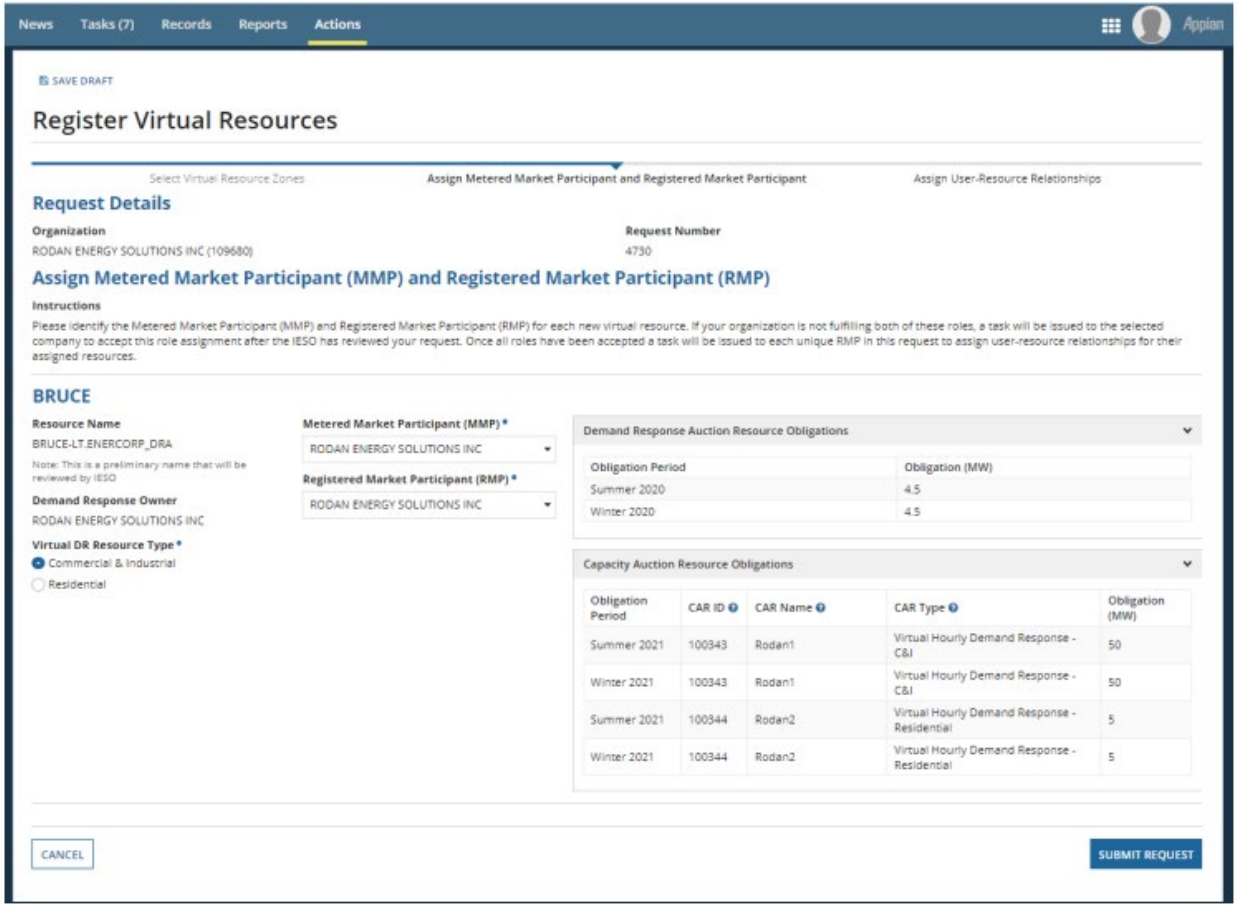


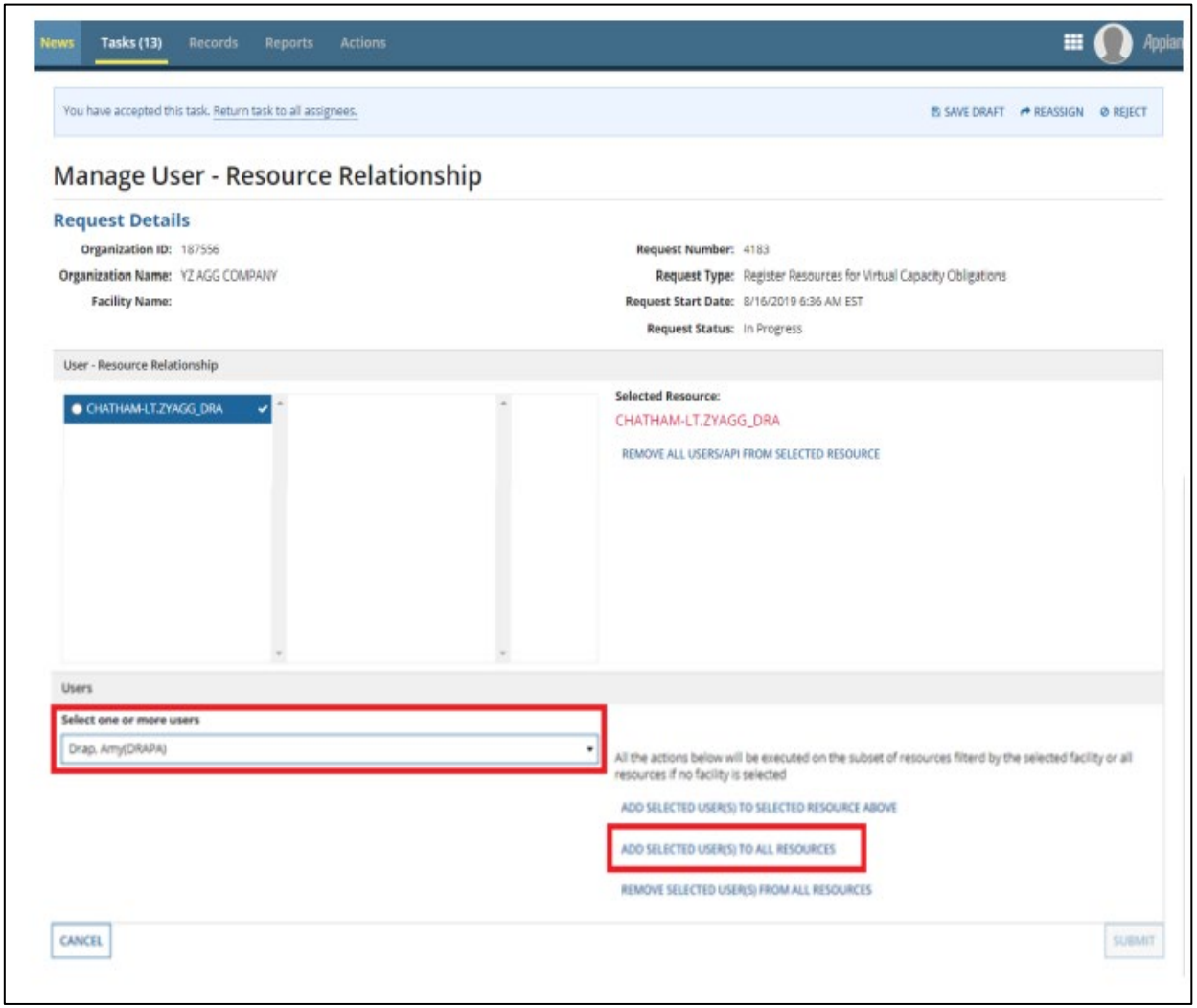
Step	Instruction	Picture
1	Action: Manage Resources Log in to the Online IESO web-based registration system using this link. Enter your Username and Password, and click **Sign In.**	

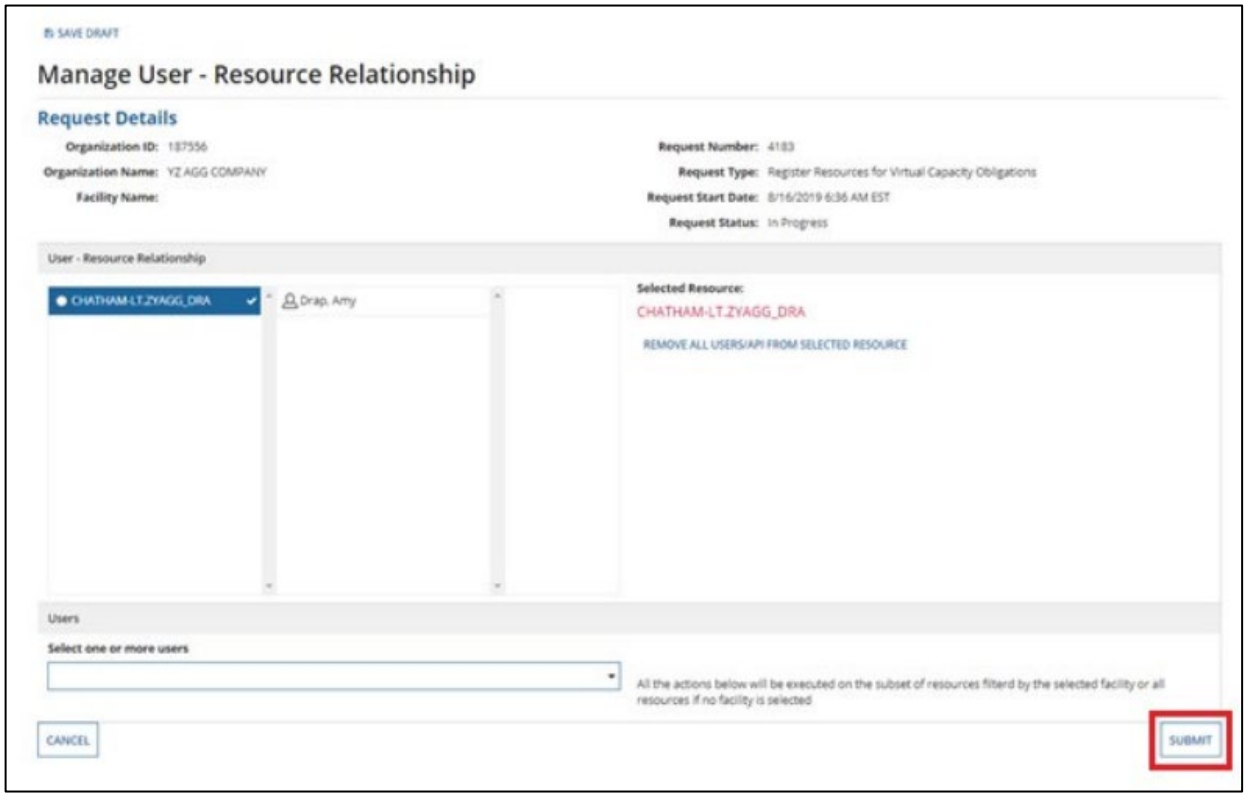
Step	Instruction	Picture
2	Click **Actions** on the menu bar at the top of the screen. Select **Manage Resources** from the list of available action items displayed on the subsequent screen. Note: In order to assign capacity, if you already have resources assigned to your virtual CARs, use the Manage 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.	

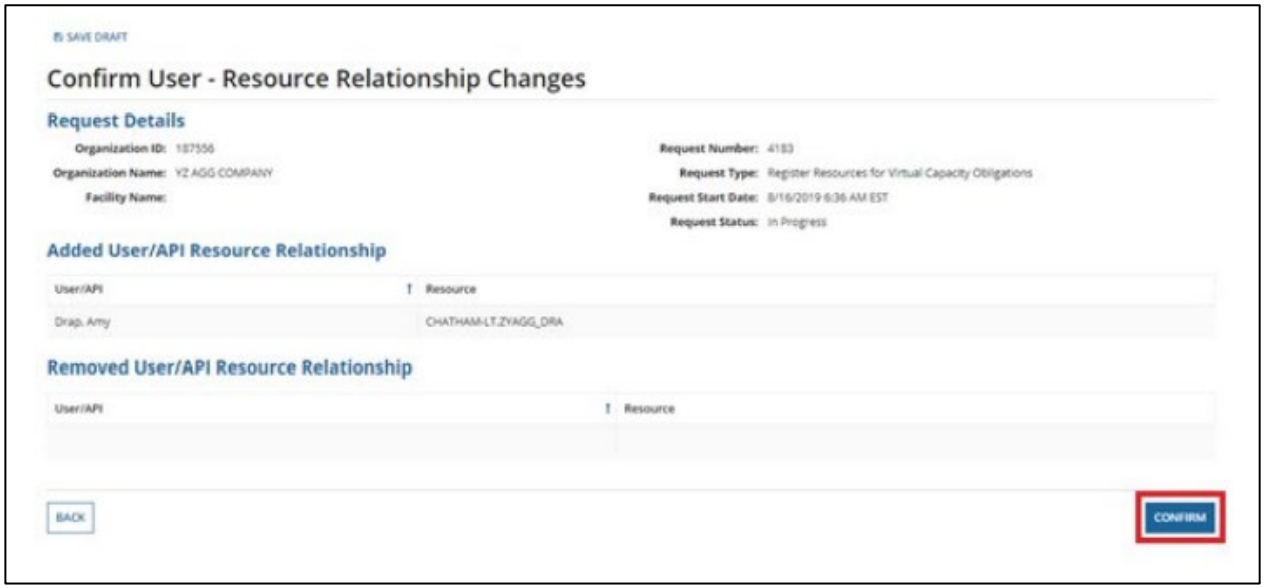
Step	Instruction	Picture
4	On the following screen, select from the drop down list the name of the organization that owns the equipment associated to the resource you intend on managing, and click **Next**.	
5	The Request New Virtual Resource(s) screen is displayed. Select the check box corresponding 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.	



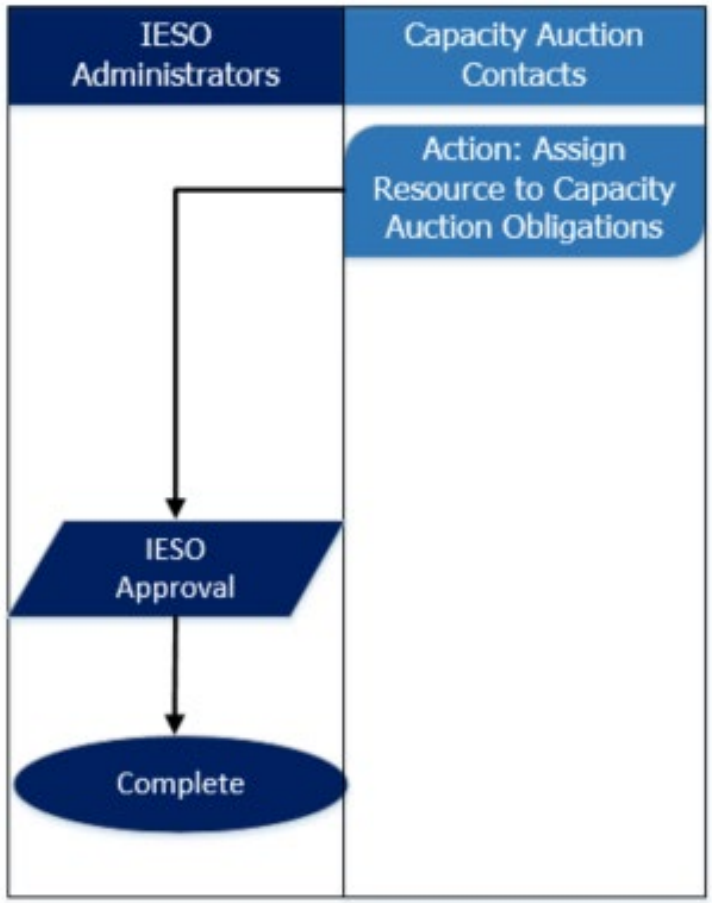
Step	Instruction	Picture
7	Task: Manage User -Resource Relationship for New Resource(s) Click **Tasks** on the menu bar at the top of the screen. Select **Manage User - Resource Relationship** for **New Resources** <**your organization**> from the list of available tasks displayed on the subsequent screen. 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.	

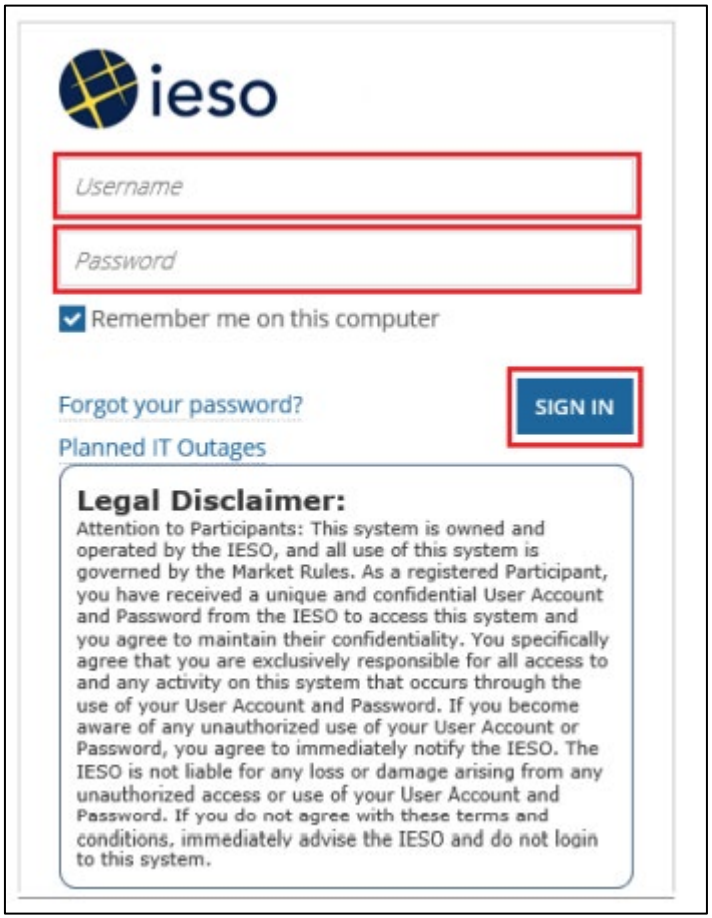
Step	Instruction	Picture
8	Review/confirm your selection, and click **Submit**.	

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	

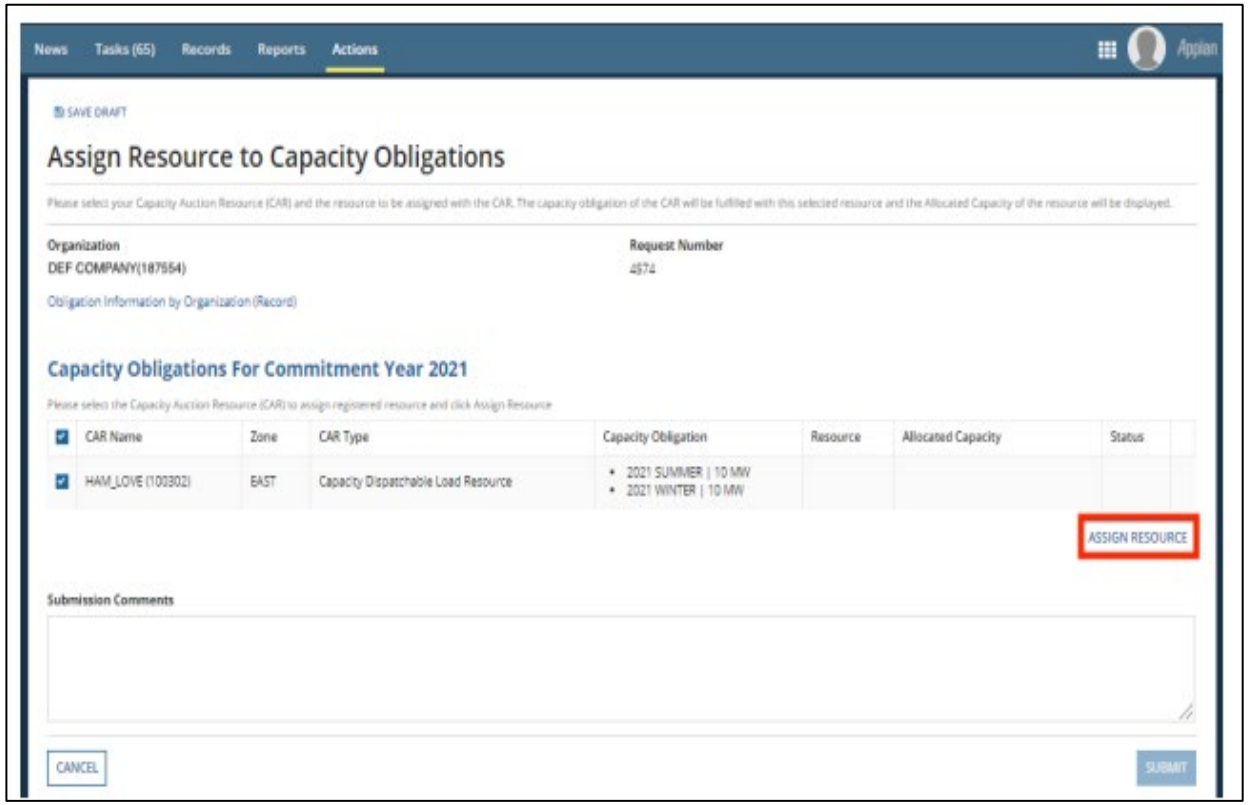
7. How to Assign a New Physical DR Resource to an Obligation

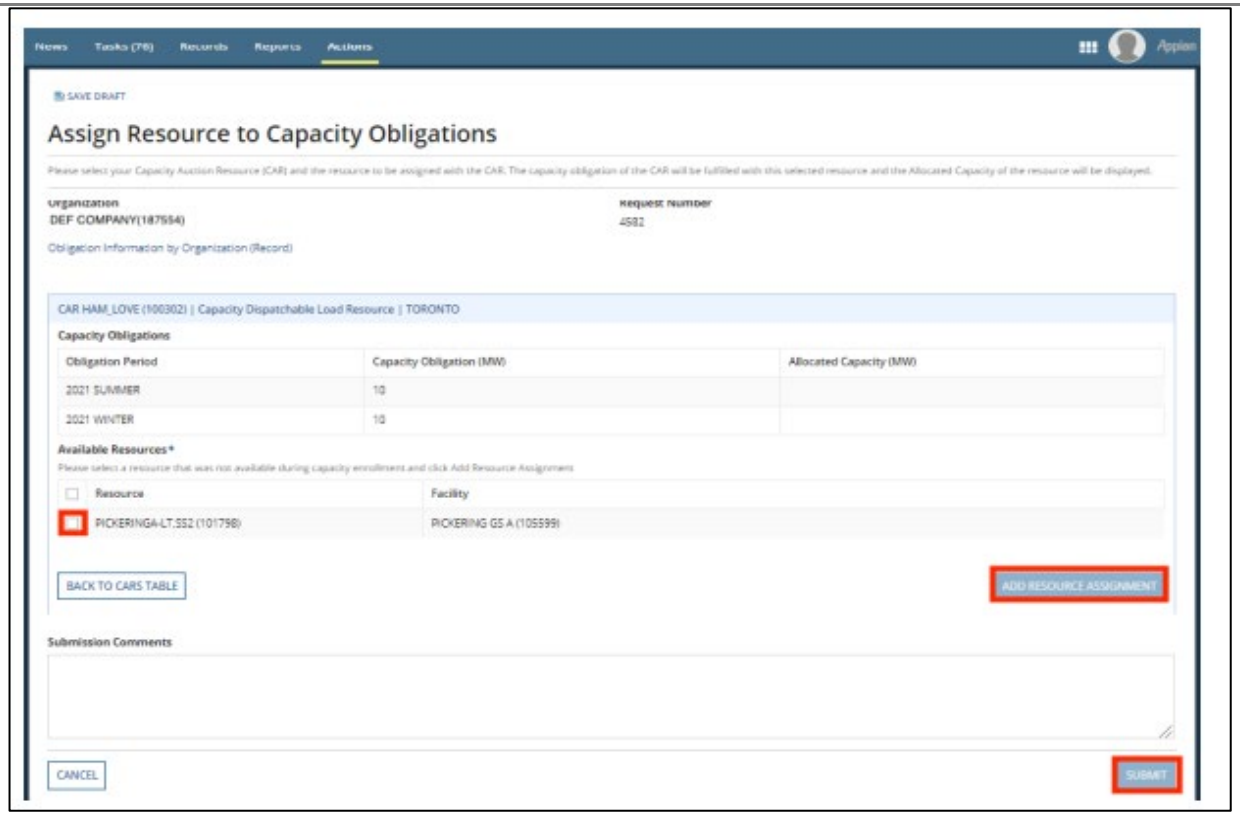
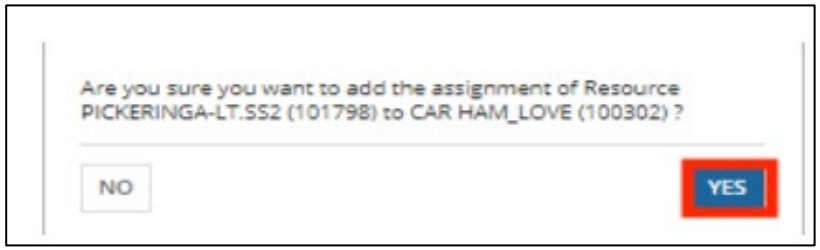
The following table provides step-by-step instructions, with accompanying screen captures, describing how to assign physical resources to a Capacity Obligation using the Online IESO web-based registration system.



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 ⚠

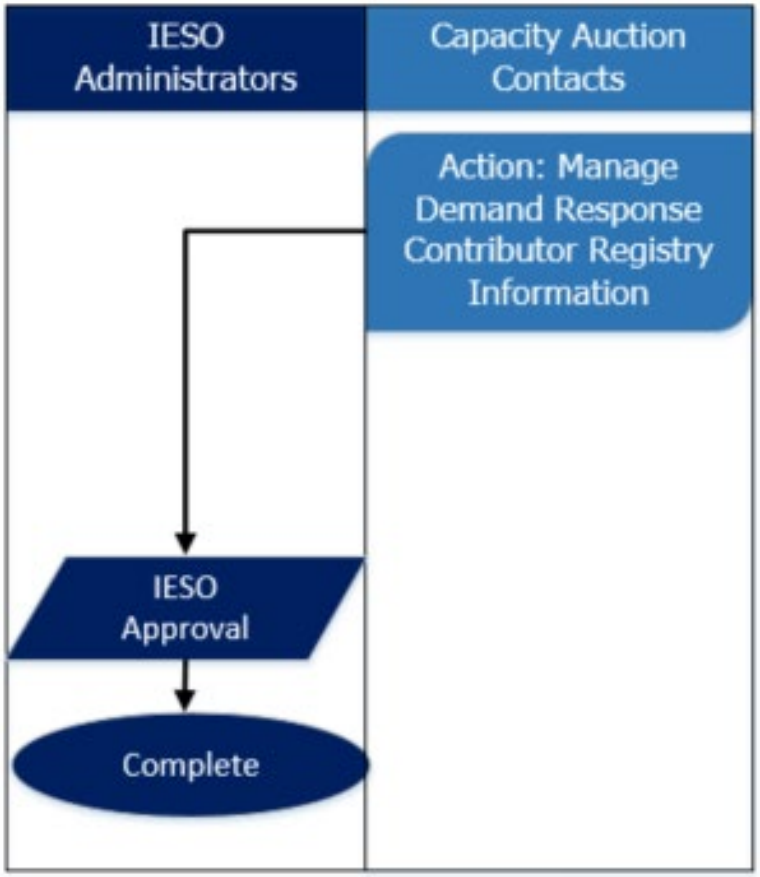
⚠ Please note that the resource capability is lower than the capacity obligation.

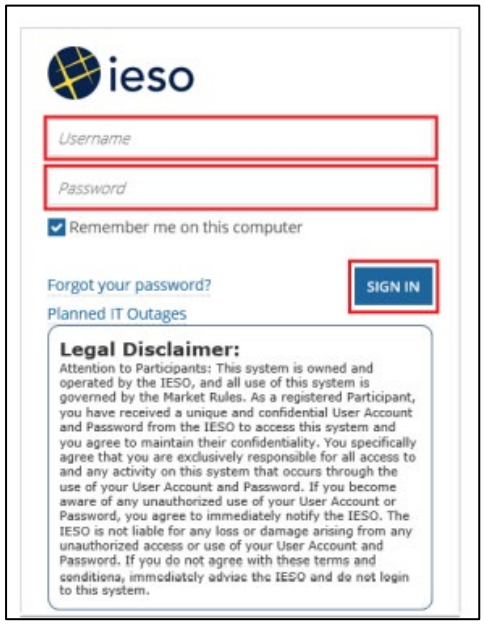
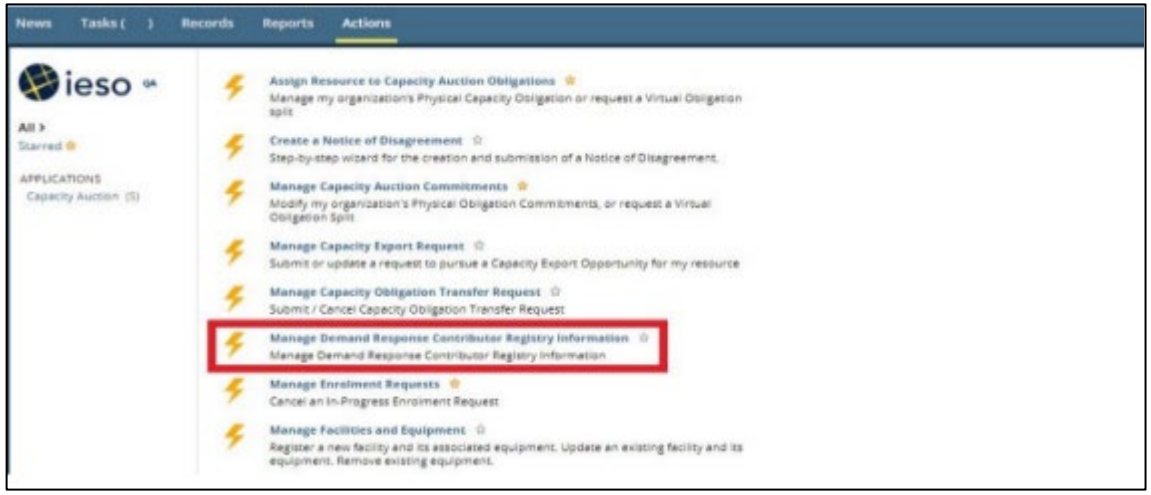
Sincerely,
IESO

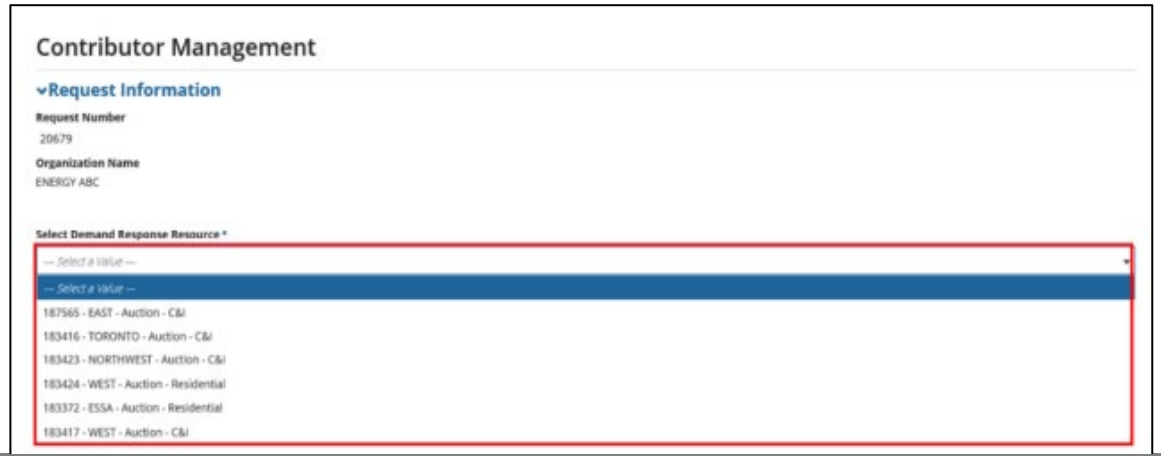
To
IESO Enrolment Specialist

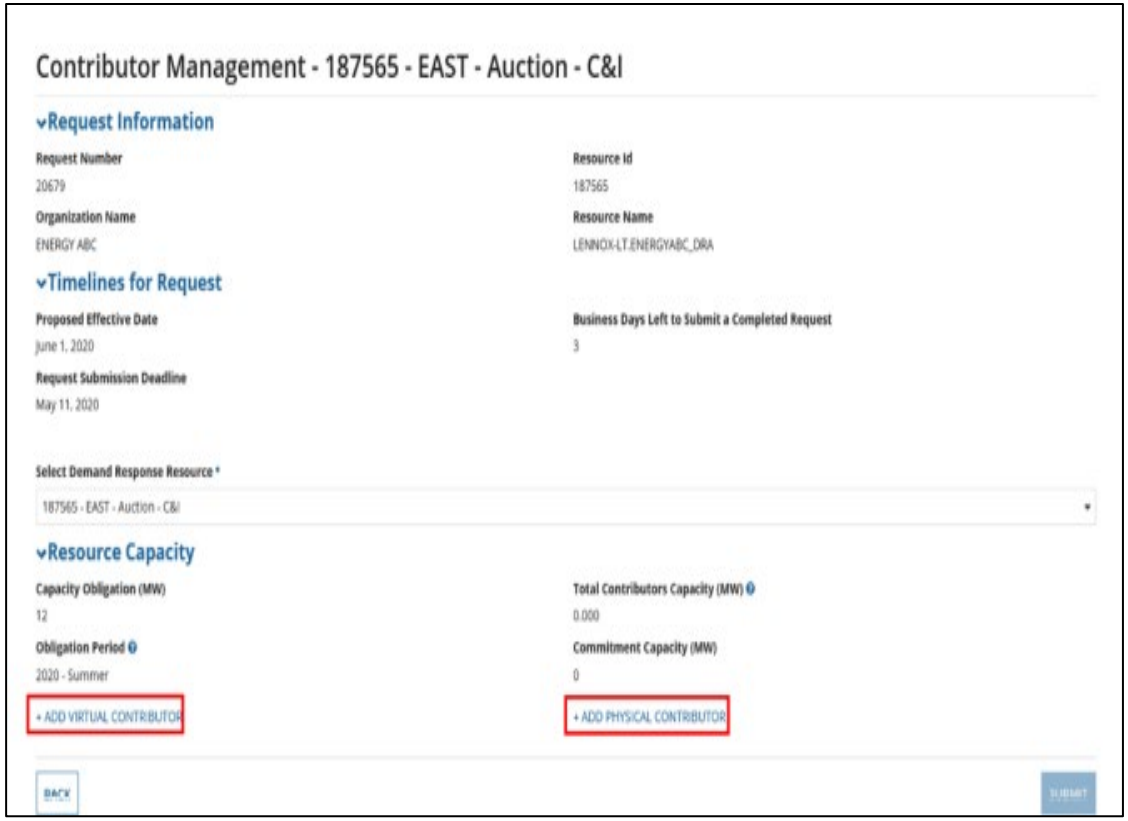
8. How to Manage Contributors for Virtual HDR Resources

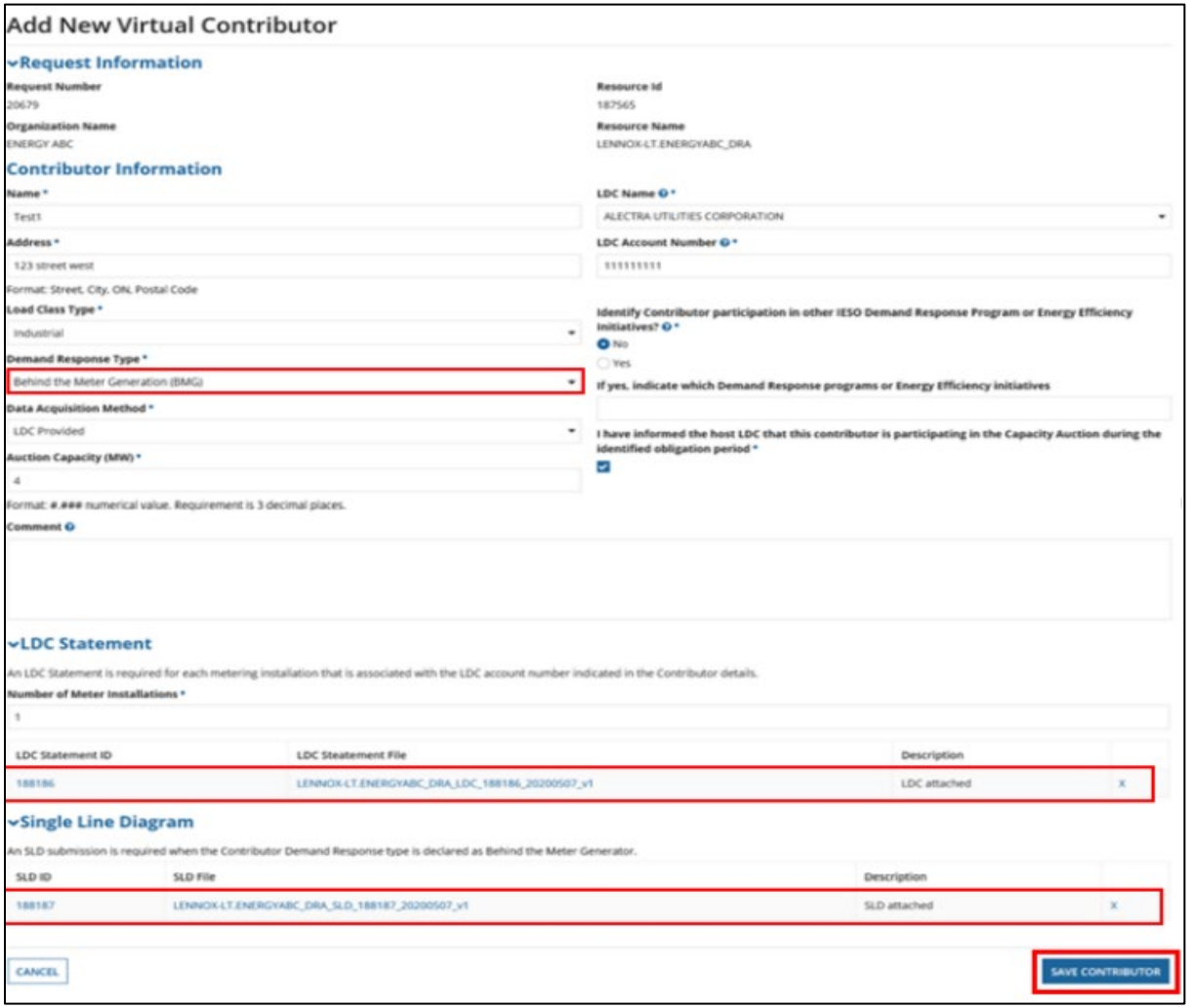
The following table provides step-by-step instructions, with accompanying screen captures, describing how to manage contributors using the Online IESO web-based registration system.



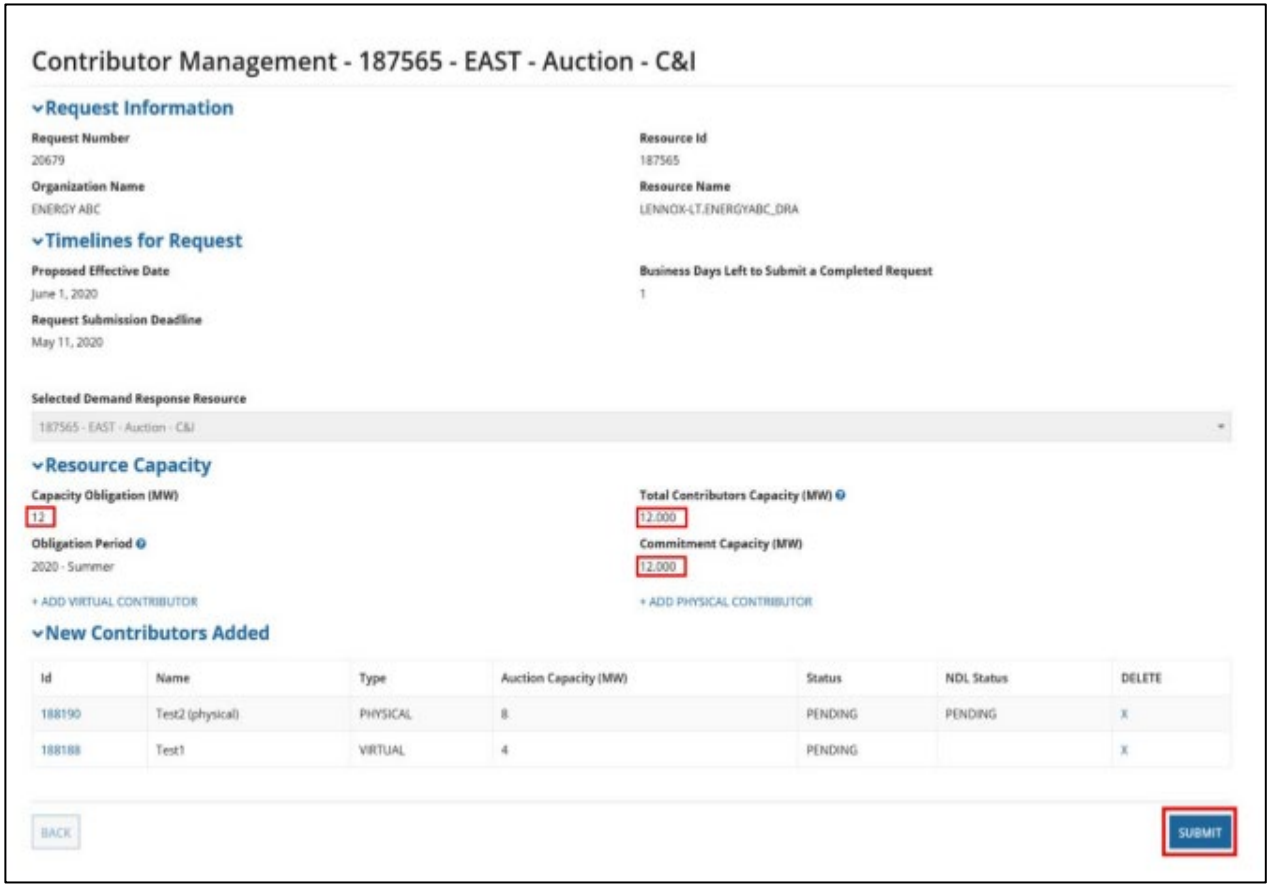
Step	Instruction	Picture
1	Action: Manage Demand Response Contributor Management Registry Log in to the Online IESO web-based registration system using this link. Enter your Username and Password, and click **Sign In**.	
2	Click **Actions** on the menu bar at the top of the screen. Select **Manage Demand 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	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**. Note: It is possible to cancel the request, provided that the request has not passed final approval.	
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).	

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	

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.	

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-LT.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

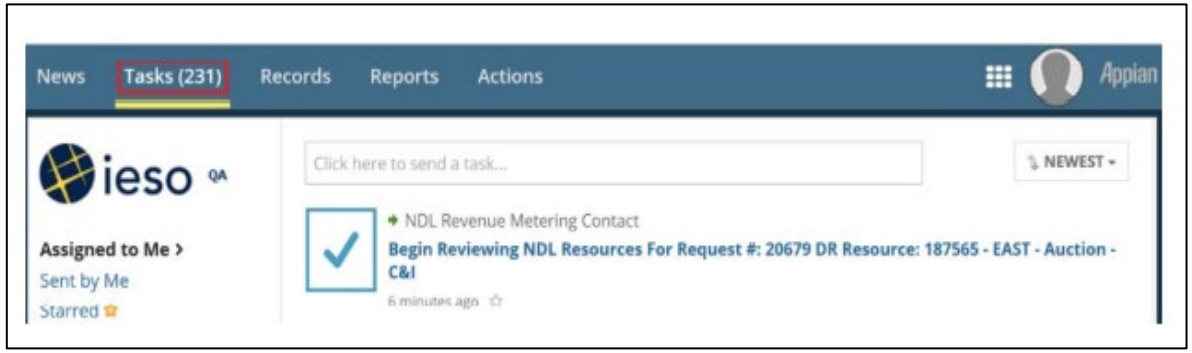
Capacity Obligation (MW): 12
Total Contributors Capacity (MW): 12.000
Obligation Period: 2020 - Summer
Commitment Capacity (MW): 12.000

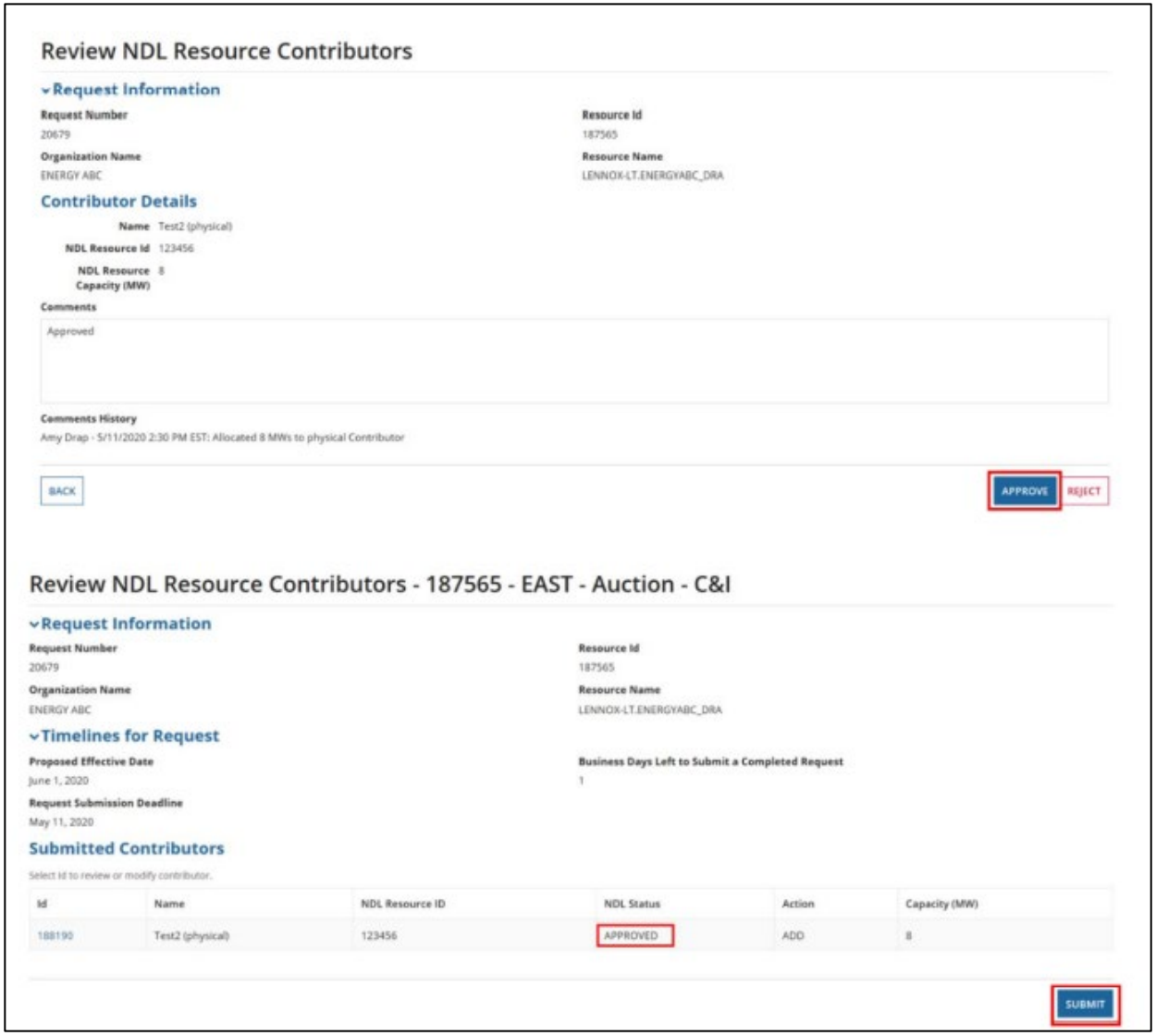
+ ADD VIRTUAL CONTRIBUTOR
+ ADD PHYSICAL CONTRIBUTOR

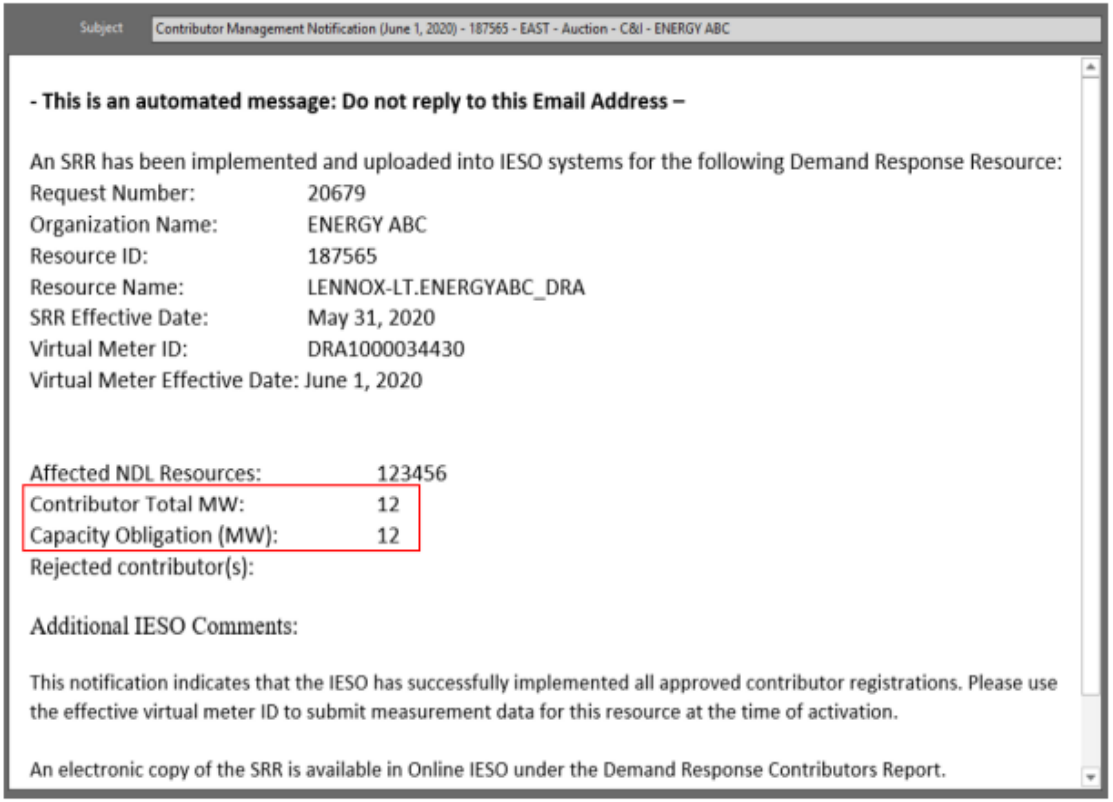
New Contributors Added

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

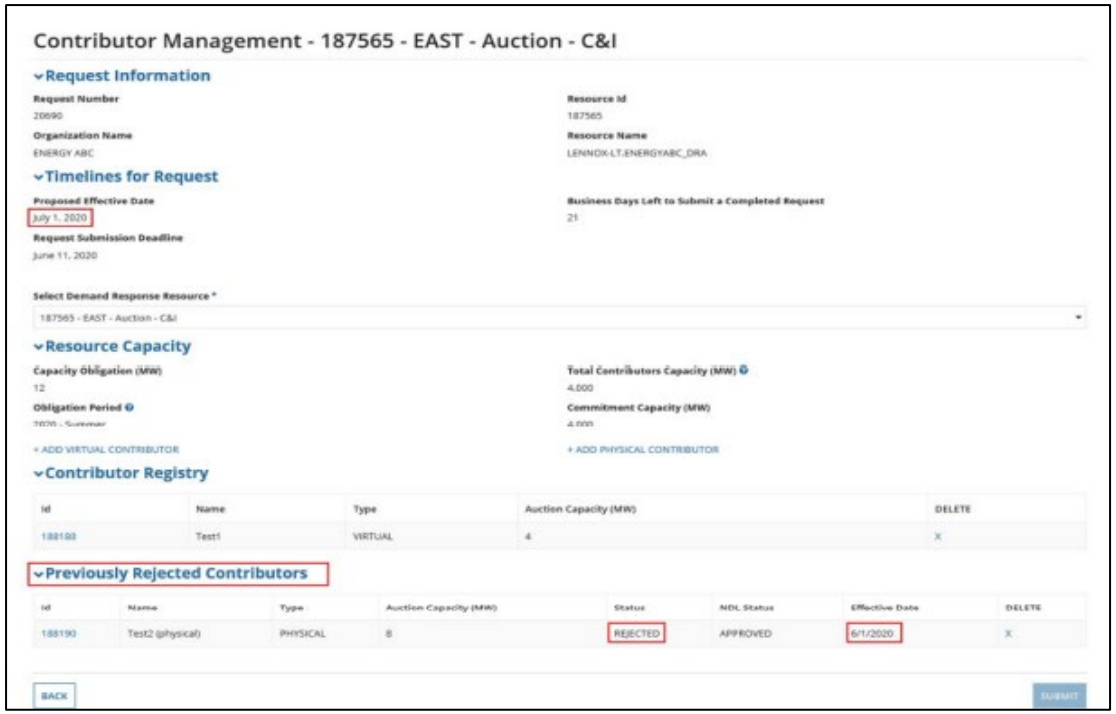
BACK
SUBMIT

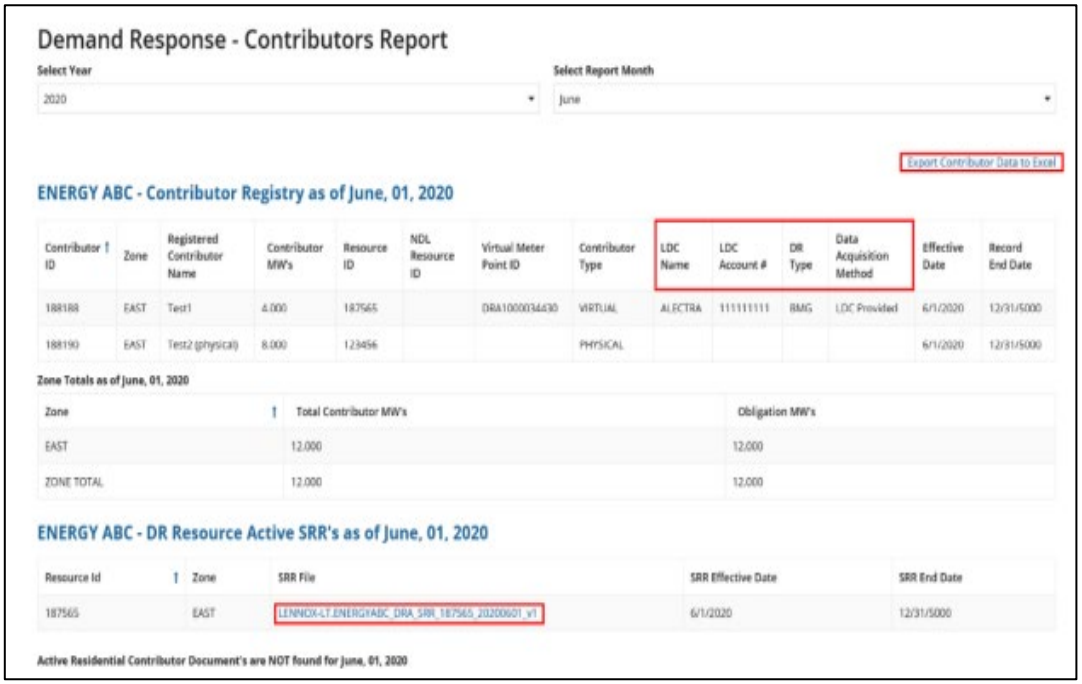
Step	Instruction	Picture
10 **(C&I)**	Once the request has been submitted by the CMP, Online IESO will generate a separate task for the Non - Dispatchable Load (NDL) **Revenue Metering Contact** to approve the capacity allocated to the physical contributor. The NDL Revenue Metering Contact must log in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

Step	Instruction	Picture
12 **(C&I)**	Finally, at the Review NDL Resource – Confirmation screen select **Click Here to Finish Review**.	
13 **(C&I)**	Scenario #1 – IESO Approves a Contributor Request 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.	

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.	Subject: Contributor Management Notification (June 1, 2020) - 187565 - EAST - Auction - C&I - ENERGY ABC **- This is an automated message: Do not reply to this Email Address –** An SRR has been implemented and uploaded into IESO systems for the following Demand Response Resource: Request Number: 20679 Organization Name: ENERGY ABC Resource ID: 187565 Resource Name: LENNOX-LT.ENERGYABC_DRA SRR Effective Date: May 31, 2020 Virtual Meter ID: DRA1000034430 Virtual Meter Effective Date: June 1, 2020 Affected NDL Resources: 123456 Contributor Total MW: 4 Capacity Obligation (MW): 12 Rejected contributor(s): Test2 (physical) Additional IESO Comments: This notification indicates that the IESO has successfully implemented all approved contributor registrations. Please use the effective virtual meter ID to submit measurement data for this resource at the time of activation. An electronic copy of the SRR is available in Online IESO under the Demand Response Contributors Report. Subject: Contributor Management Notification (June 1, 2020) - 187565 - EAST - Auction - C&I - ENERGY ABC **- This is an automated message: Do not reply to this Email Address –** This notification indicates that one or more of your facilities enrolled in a Demand Response Market Participant's contributor portfolio has been removed from the following resource: Request Number: 20679 Organization Name: ENERGY ABC Resource Name: LENNOX-LT.ENERGYABC_DRA Effective Date: June 1, 2020 Removed NDL Resources: 123456 IESO

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		DRA1000034430	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

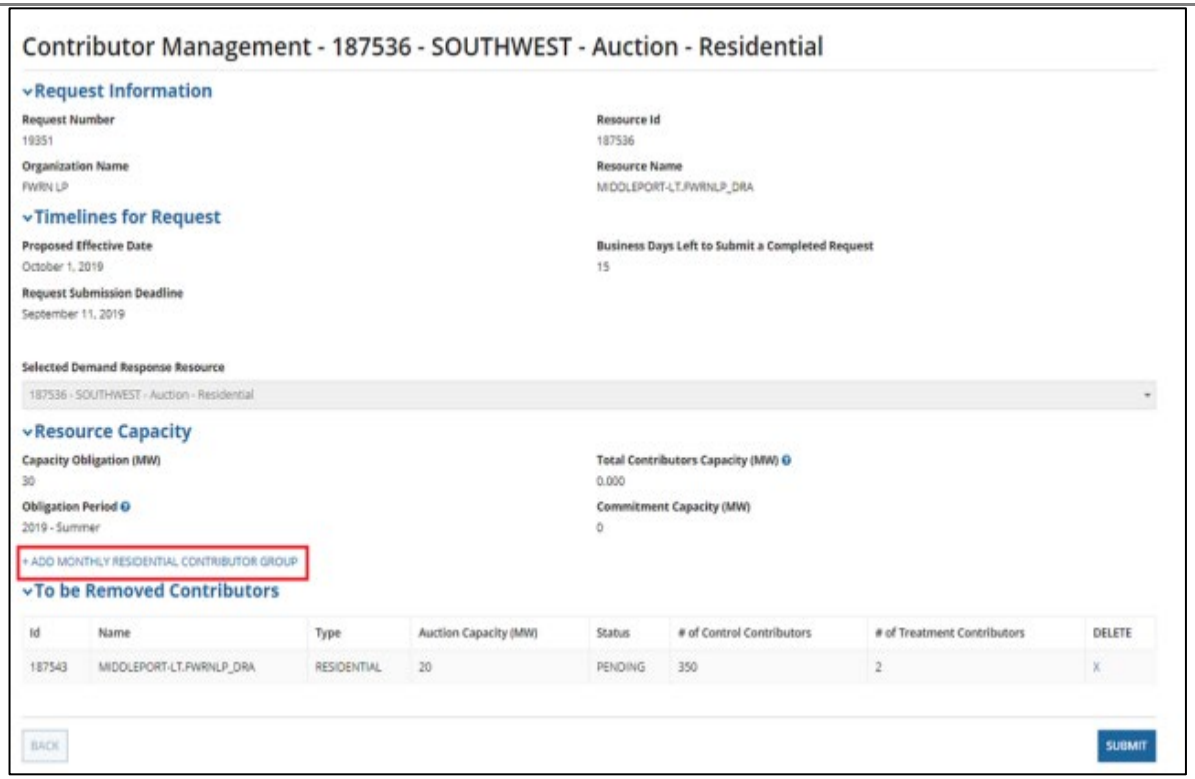
Zone	Total Contributor MW's	Obligation MW's
EAST	12.000	12.000
ZONE TOTAL	12.000	12.000

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.	



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

Add New Residential Contributor

Request Information

Request Number
19351

Resource Id
187536

Organization Name
FWRN LP

Resource Name
MIDDLEPORT-LT.FWRNLP_DRA

Contributor Effective Month
October, 2019

Contributor Details

Treatment Contributors Capacity (MW) *
30

Number of Treatment Contributors *
200

Number of Control Contributors *
400

Residential Contributor Management Registration Template
Please click the link above to download the excel template.

Select file to upload *
RES Contributor Management Registration Test
XLSX - 28.18 KB
File format limited to Microsoft Excel (.xls or .xlsx)

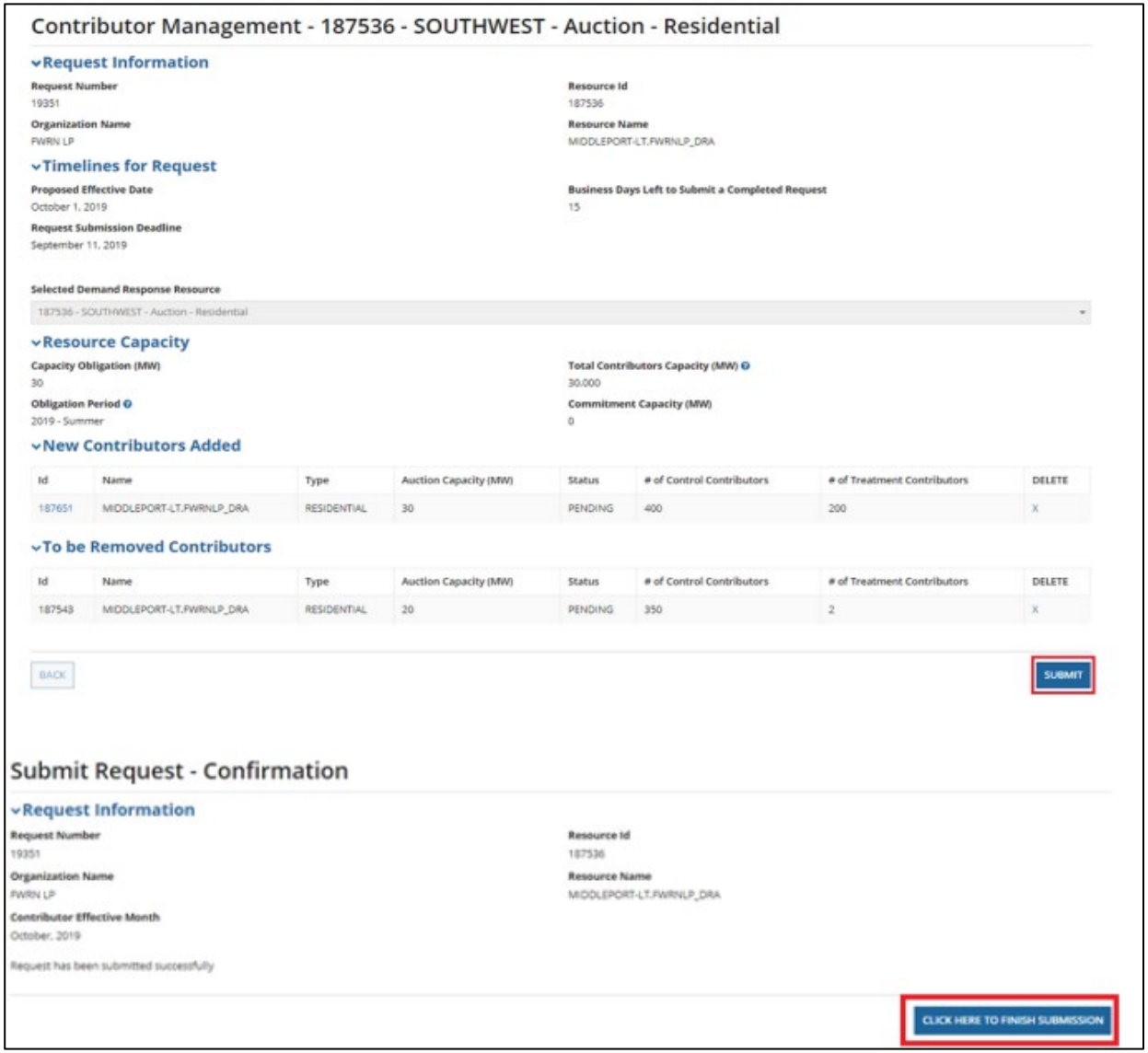
Comments

CANCEL SAVE

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

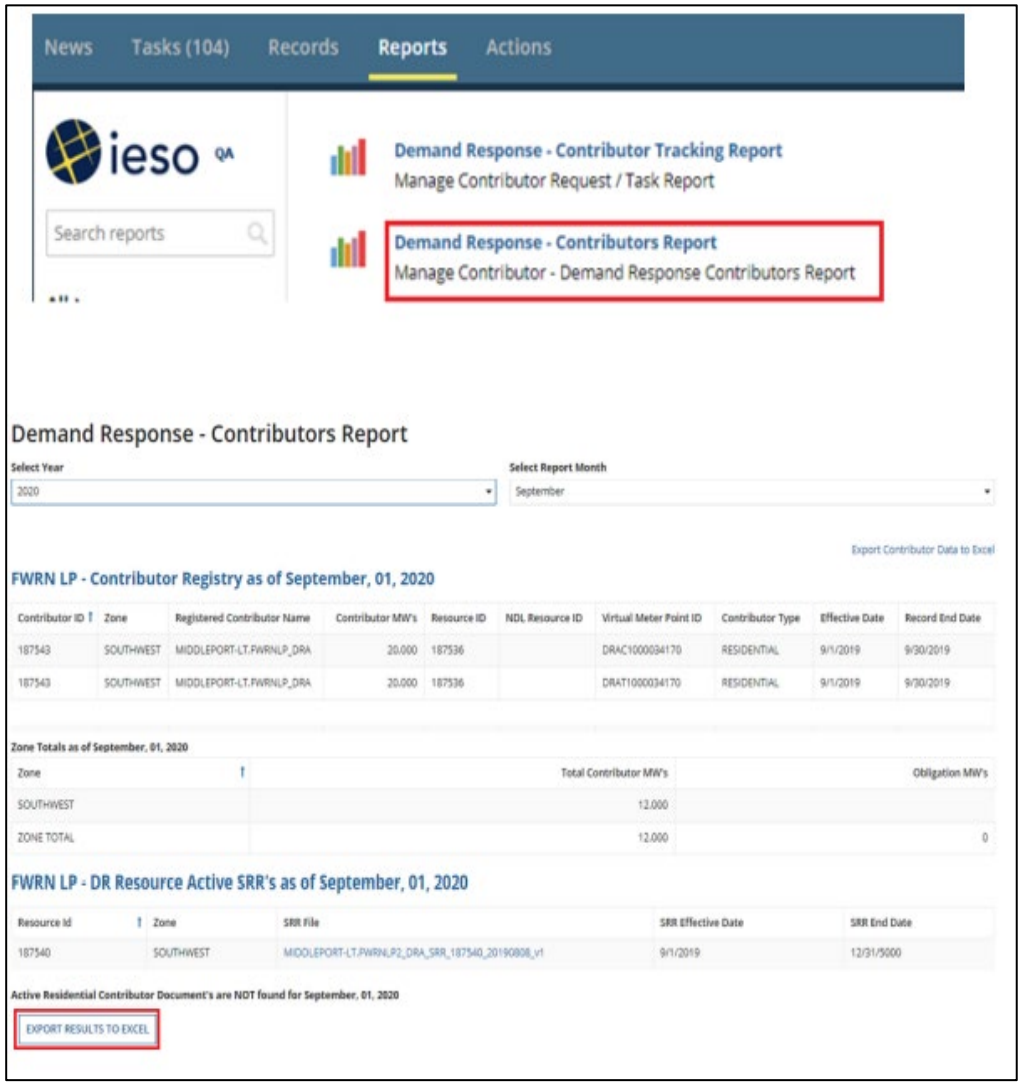
Submit Request - Confirmation

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

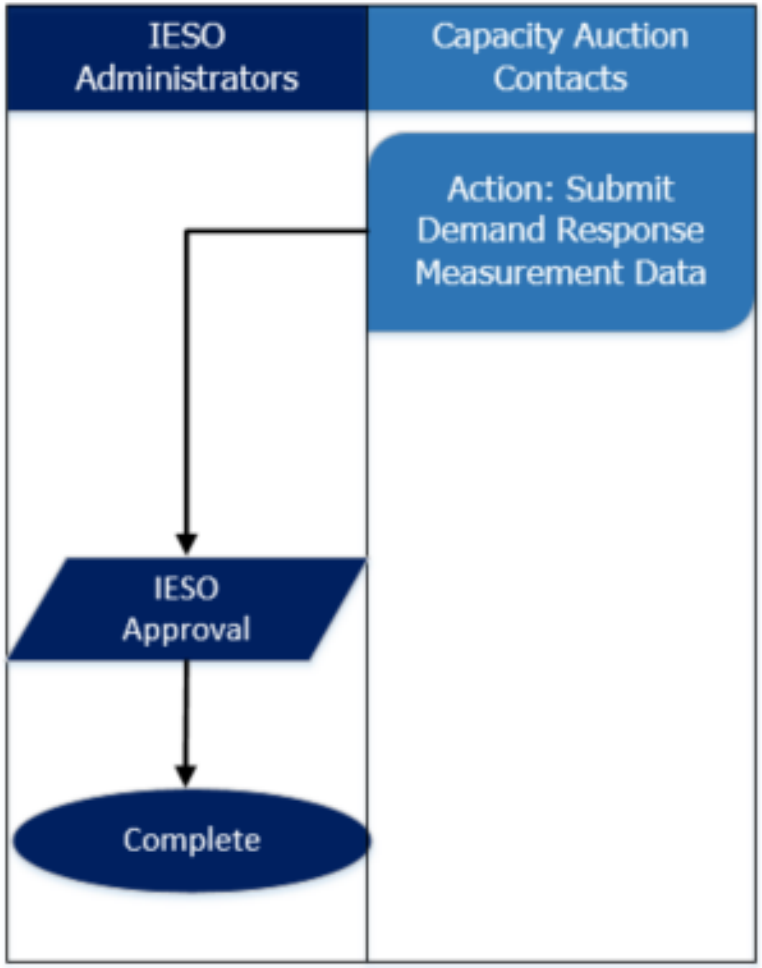
CLICK HERE TO FINISH SUBMISSION

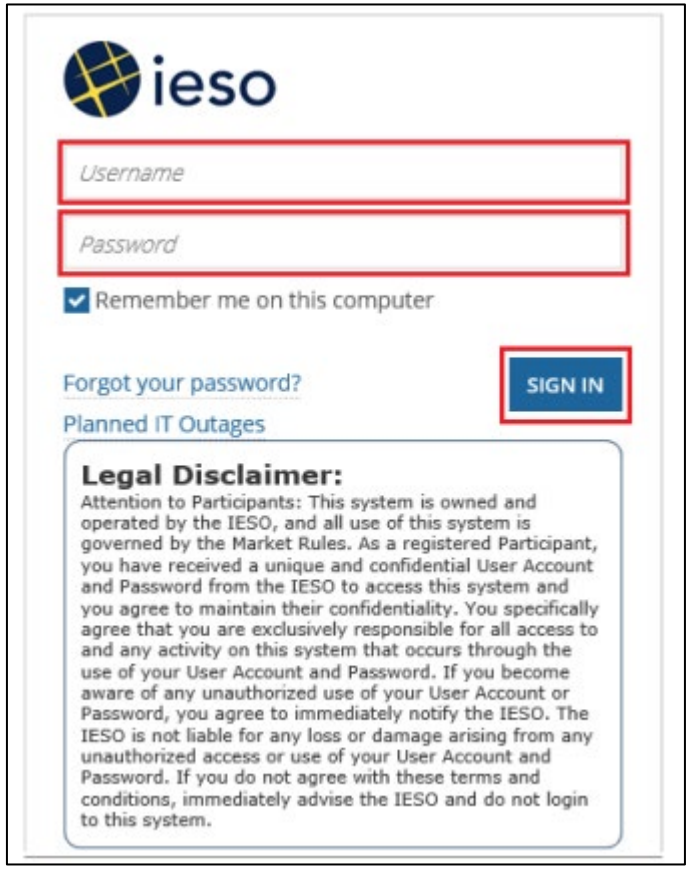
Step	Instruction	Picture
20 **(Res)**	An email notification is sent after the IESO has approved the submission.	N/A
21 **(Res)**	Click **Reports** on the menu bar at the top of the screen, and select **Demand Response – Contributors Report** to view the registered active contributors list for each zone/Demand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

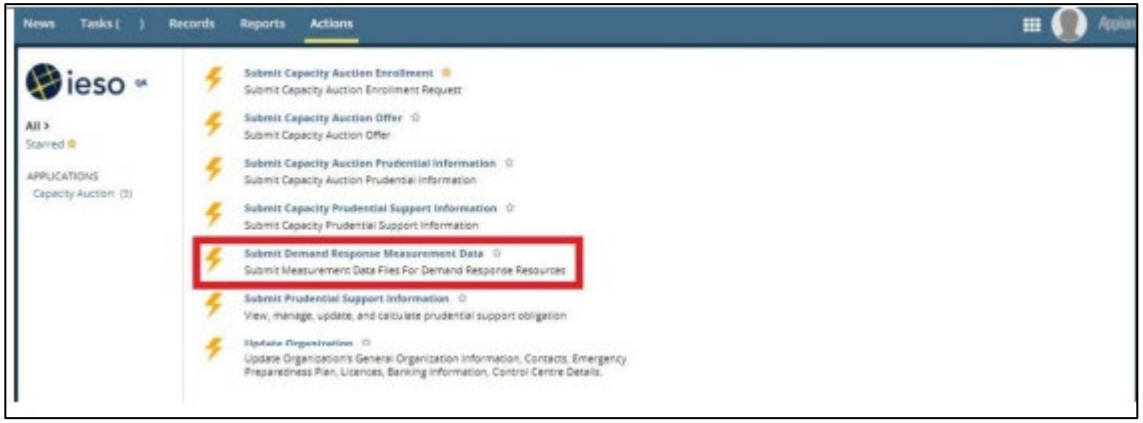
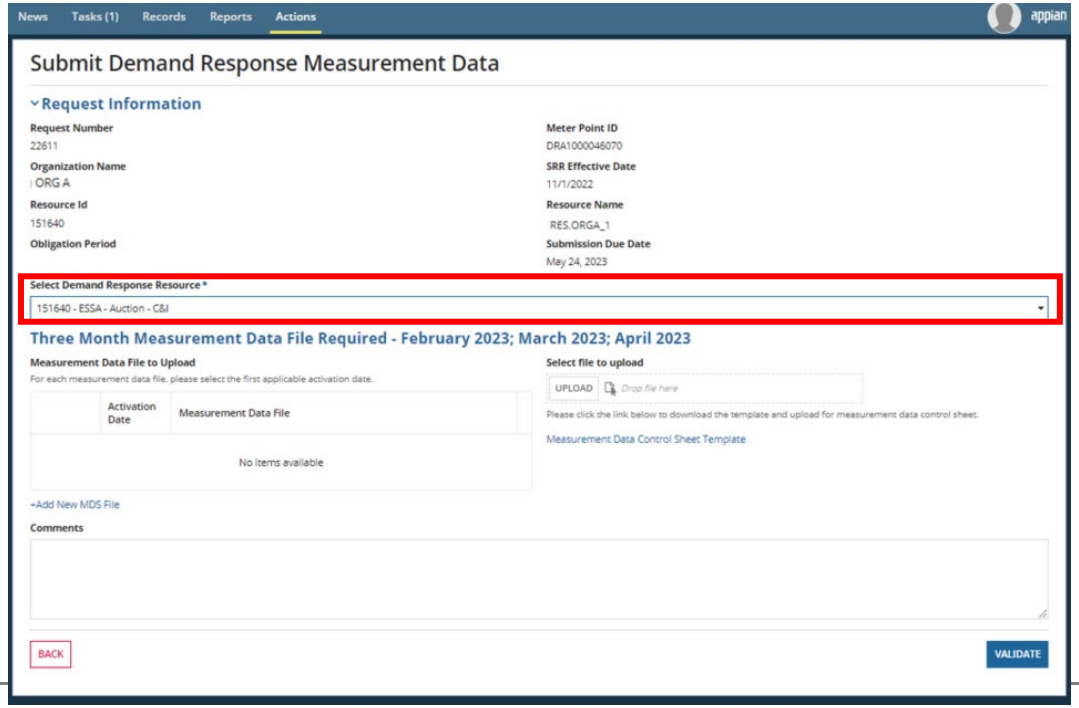
Step	Instruction	Picture
22 **(Res)**	Select the desired Residential Contributor File, and use the pop-up on the screen to download the file.	ENERGY ABC - Residential Contributor Document's as of May, 01, 2017 Resource Id ↑ | Zone | Residential Contributor File | Effective Date | End Date 143357 | WEST | CHATHAM-LT.ENERGY-ABC_DRA_RES_143394_20170501_v1 | 5/1/2017 | 5/31/2017

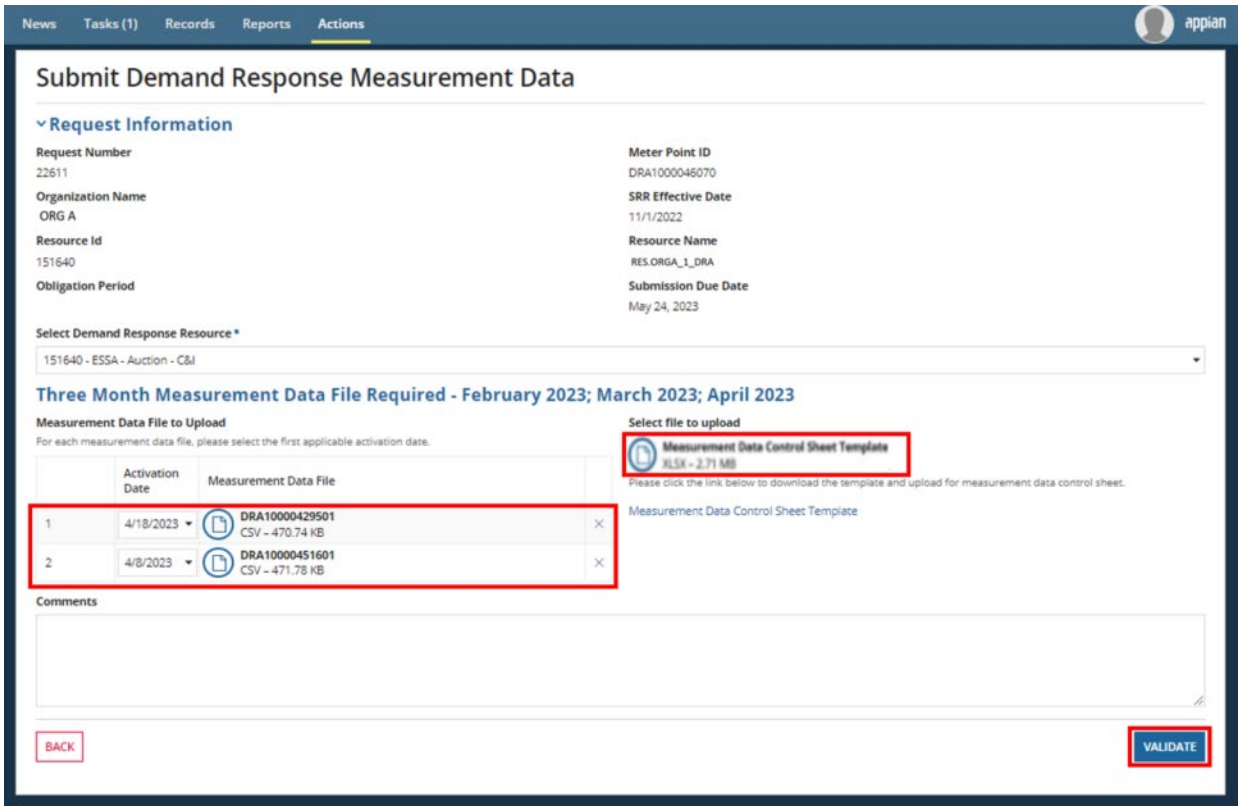
9. How to Submit Demand Response Measurement Data

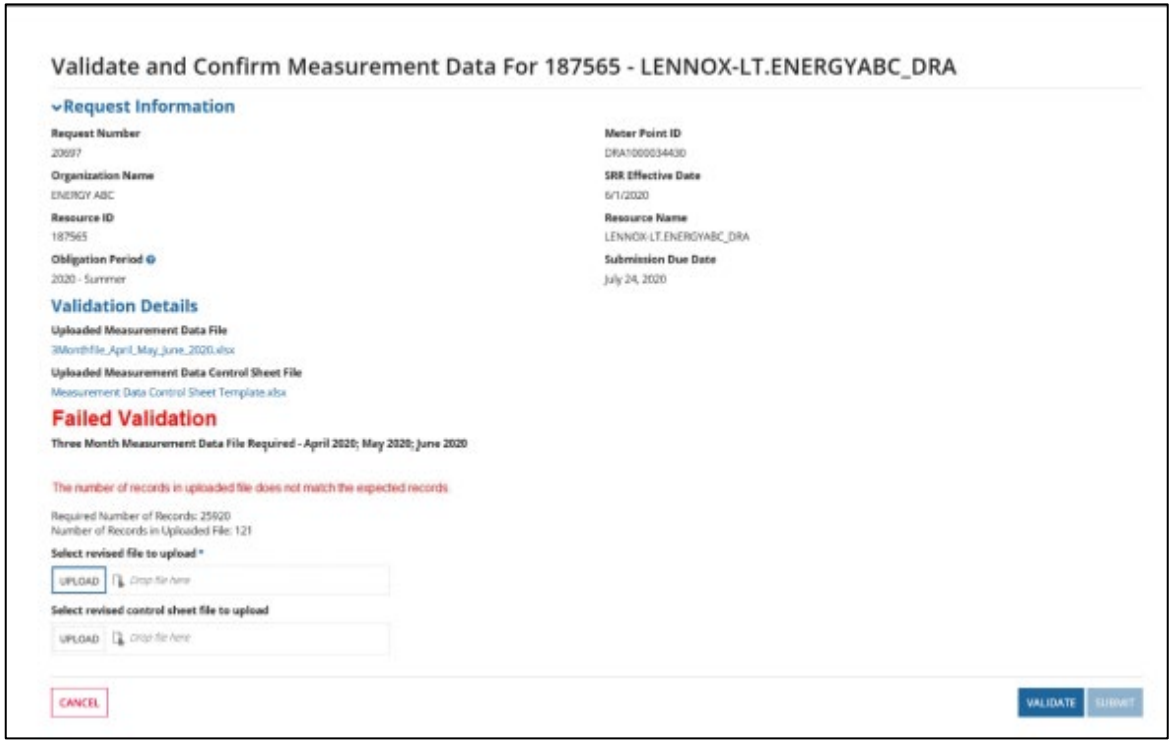
The following table provides step-by-step instructions, with accompanying screen captures, describing how to submit demand response measurement data using the Online IESO web-based registration system.

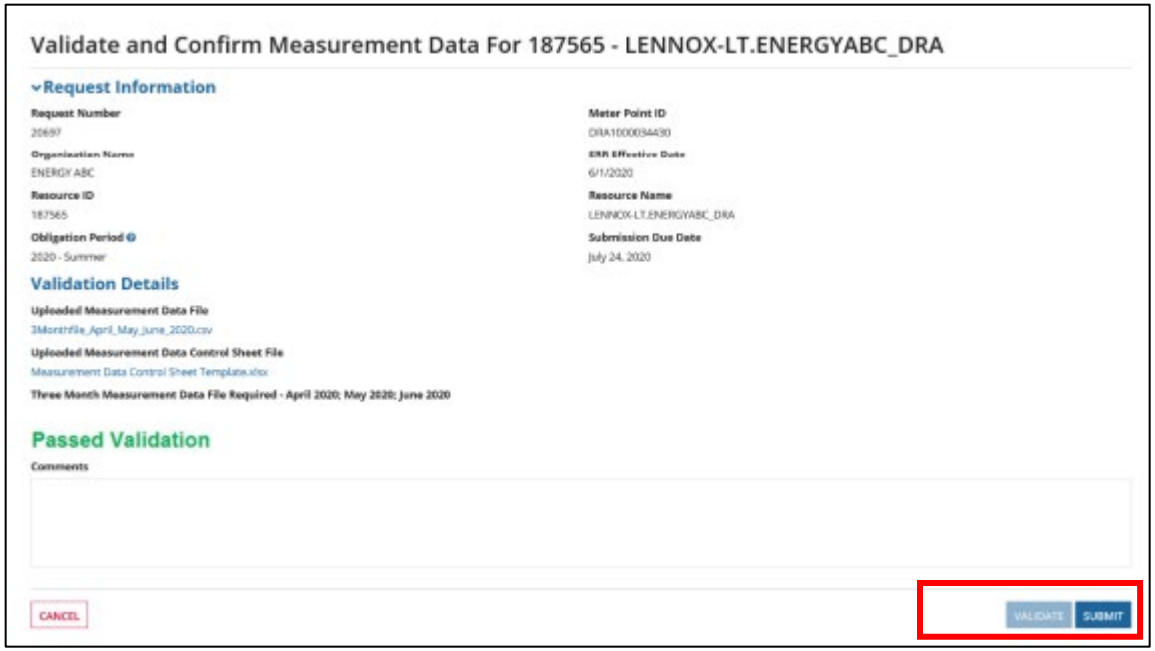
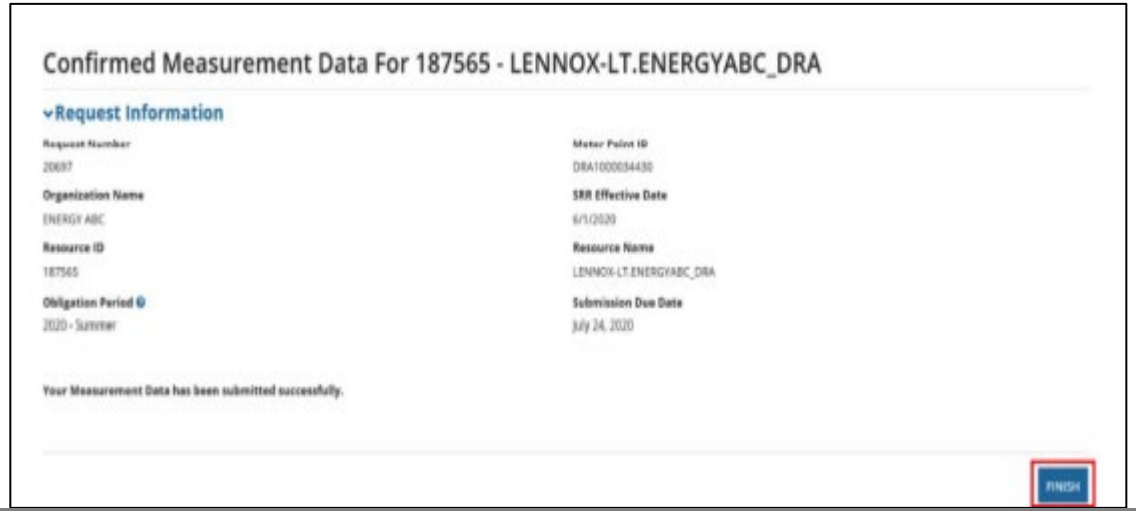


Step	Instruction	Picture
1	Action: Submit Demand Response Measurement Data Log in to the Online IESO web-based registration system using this link. Enter your Username and Password, and click **Sign In**.	

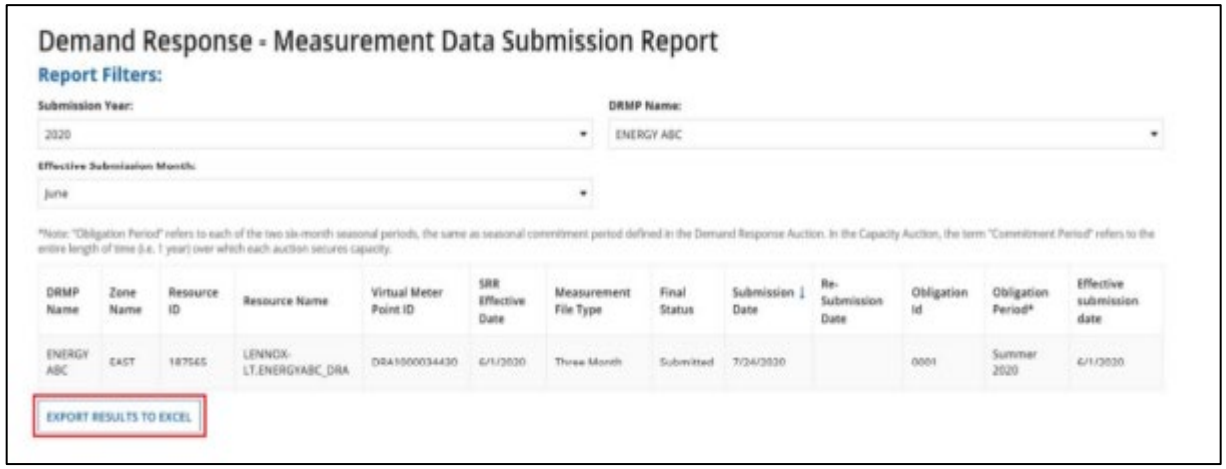
Step	Instruction	Picture
2	Click **Actions** on the menu bar at the top of the screen. Select **Submit Demand Response Measurement Data** from the list of available action items displayed on the subsequent screen. Note: This allows you to submit Virtual Measurement data with a virtual meter point ID 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)**	Example of a Failed Validation The screen is populated with results when the validation process is complete. The validation will check: 1. That the files formats meets requirements; 2. The required months of data is submitted. Specific errors will be identified if the data does not pass validation. In this example, the number of records did not match what was expected (i.e., uploaded the wrong month).	

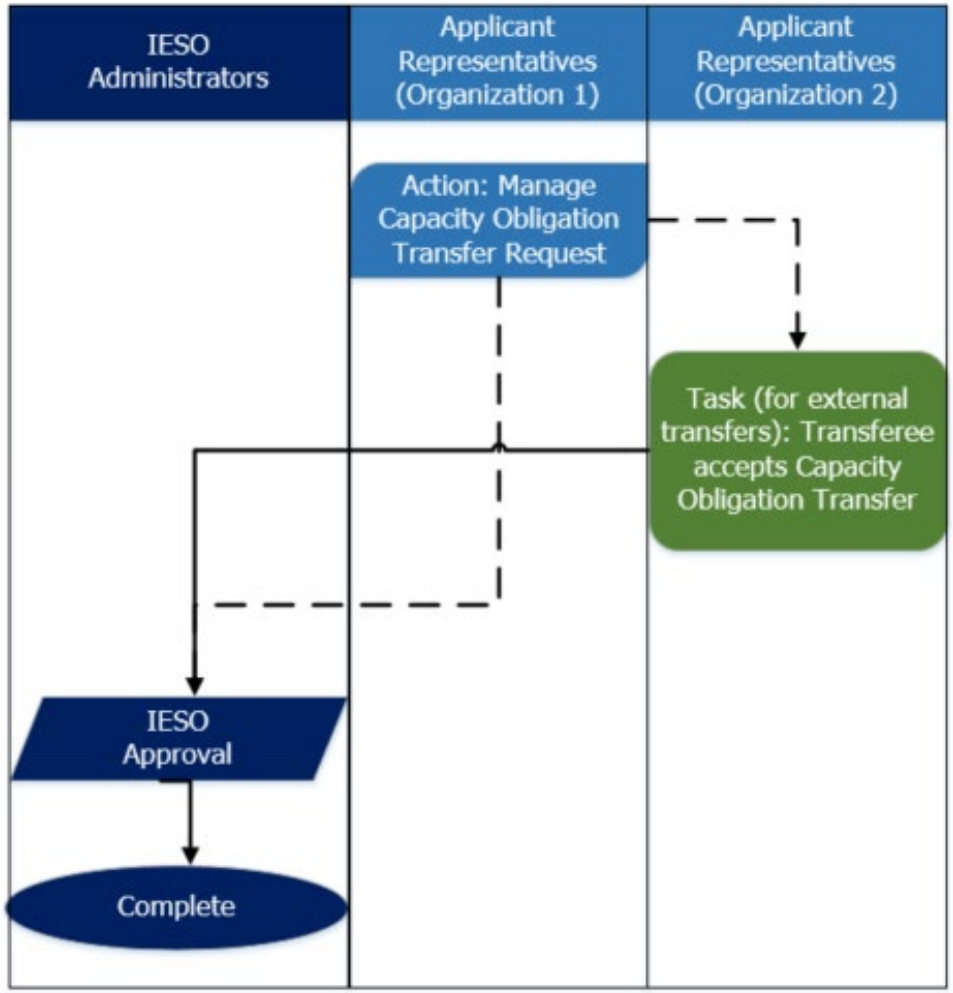
Step	Instruction	Picture
6 **(C&I)**	Example of a Passed Validation The screen is populated with the results when the validation process is complete. Click **Next MSD File to Validate**. The same validation process will be done for the second file. Important Note: The process of completing the validation 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.	

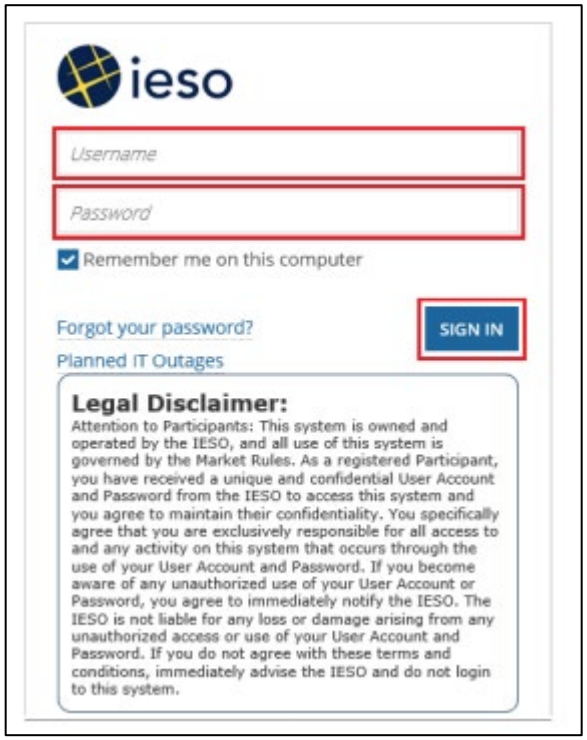
Step	Instruction	Picture
8 (C&I)	An email notification is sent after the IESO has implemented and approved the measurement data submission	Subject: Measurement Data Submission Notification (June 2020) - 187565 - ENERGY ABC **- This is an automated message: Do not reply to this Email Address –** A Measurement Data File has been received, reviewed, approved and uploaded into IESO systems for the following Demand Response resource: 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 This notification indicates IESO has successfully received measurement data submissions. IESO

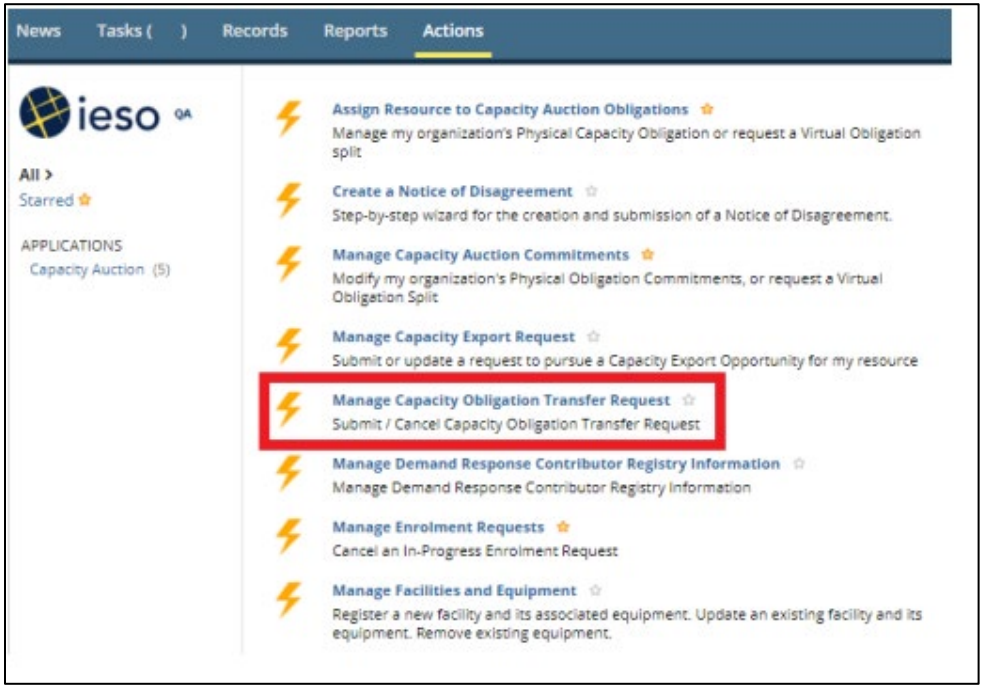
Step	Instruction	Picture
9 **(C&I)**	To view measurement submissions for each zone/DR resource by month, select **Demand Response - Measurement Data Submission Report** in the Reports tab. Note: You can view all the details of your submissions for any previous month. Select **Export Results to Excel** to export the Measurement Data Submission Report to Excel.	

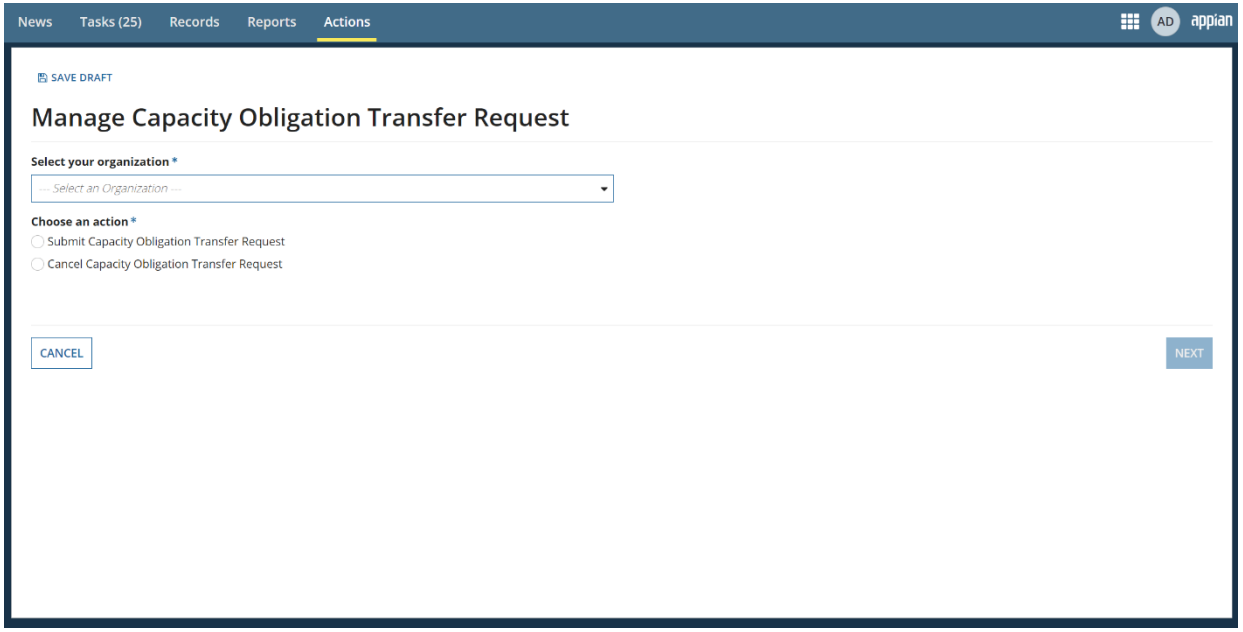
10. How to Complete a Capacity Obligation Transfer Request

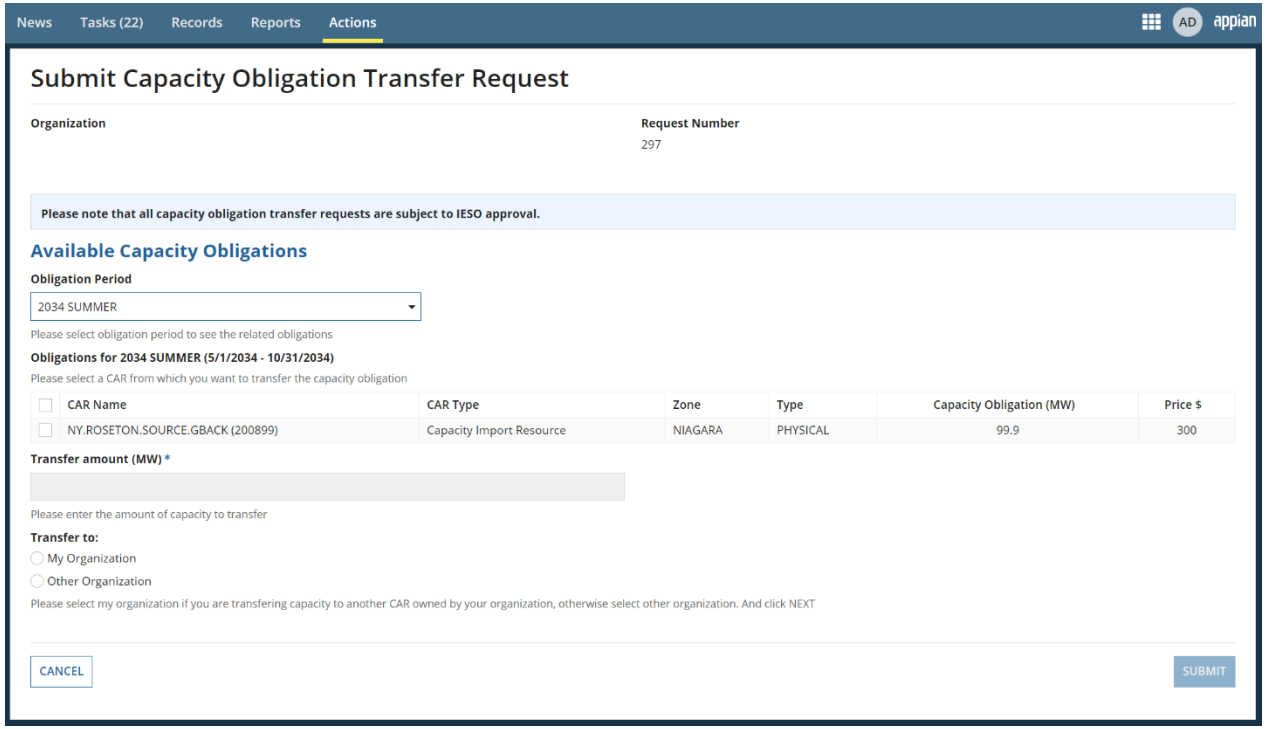
The following chapter provides step-by-step instructions, with accompanying screen captures, describing the process for completing a capacity obligation transfer request using the Online IESO web-based system.

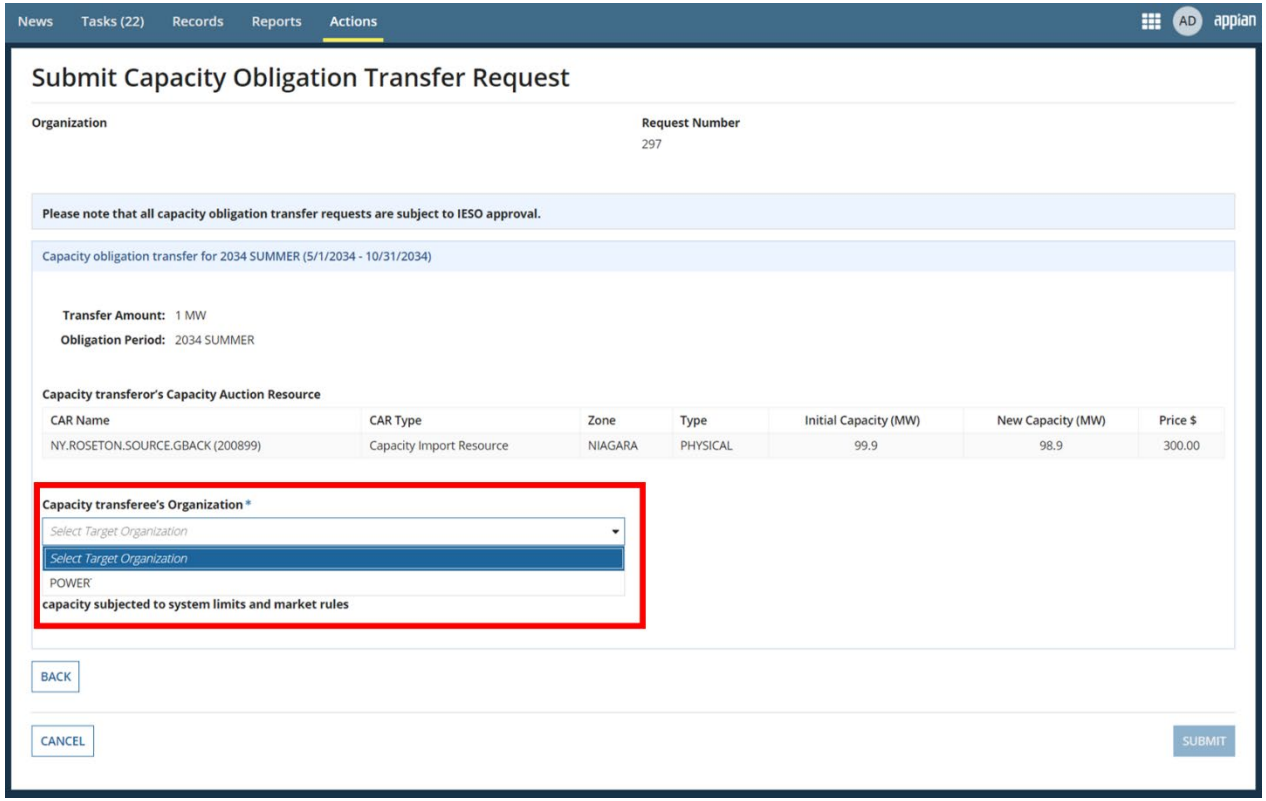


Step	Instruction	Picture
1	Action: Manage Capacity Obligation Transfer Request The Capacity Auction Contact is the contact role that can submit a transfer request. Log in to the Online IESO web-based registration system using this link. Enter your Username and Password and click **Sign In**.	

Step	Instruction	Picture
2	Click **Actions** on the menu bar at the top of the page. Select **Manage Capacity Obligation Transfer Request** from the list of available action items displayed on the subsequent screen. 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.	

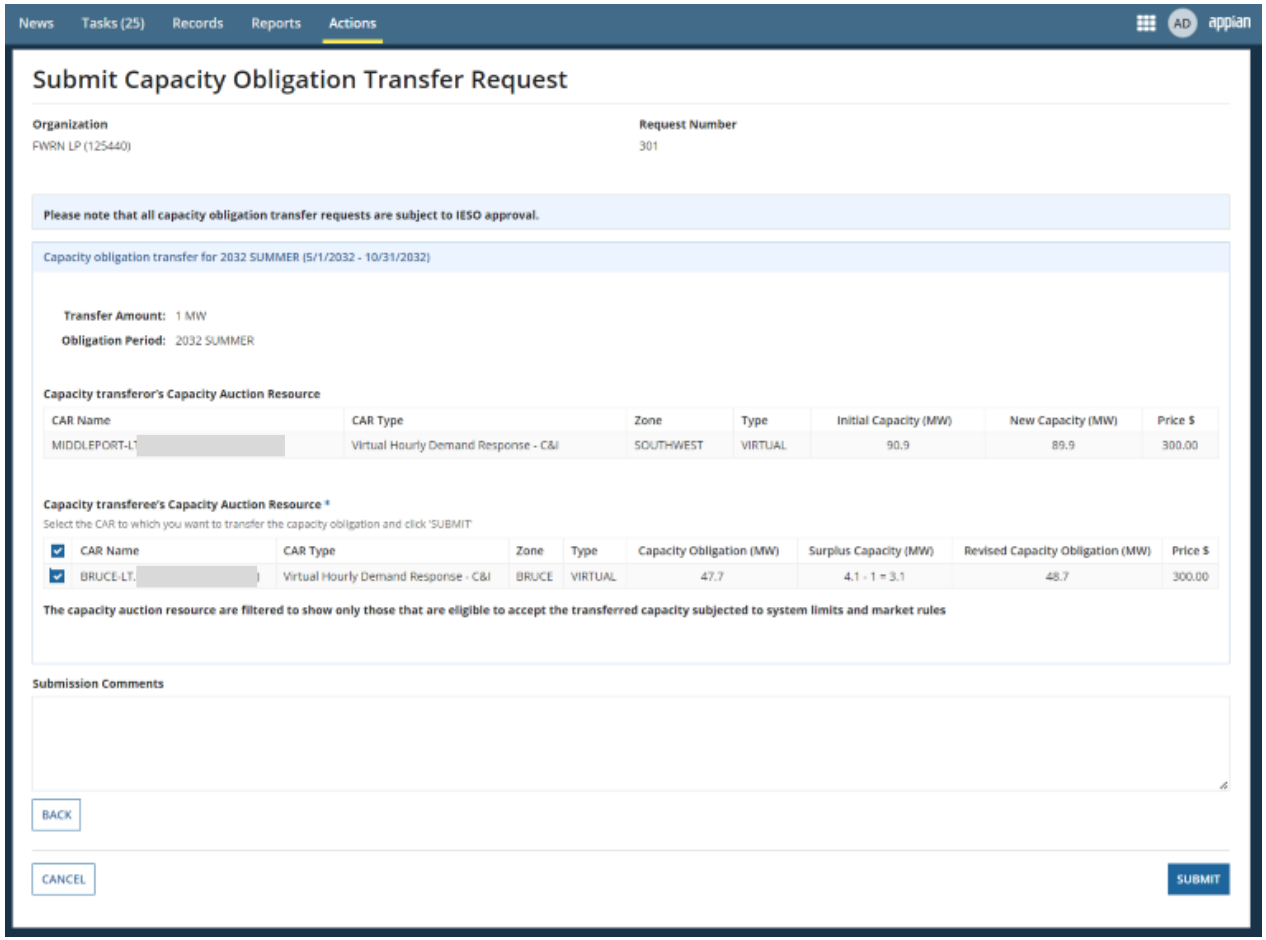
Step	Instruction	Picture
3	Select your organization name from the drop-down list and choose whether you wish to **Submit** or **Cancel** a capacity obligation transfer request. Click **Next**. To cancel a transfer request, skip to Step 9.	

Step	Instruction	Picture
4	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. Note: the transfer can only be made within the same obligation period(i.e. Not between a summer and winter obligation period.) 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: • 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
	Each transfer request can only be submitted for one CAR at a time, and can be accepted by only one CAR. Click **Submit**.	
5	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**. Note: Online IESO will only display organizations that are eligible to receive the transfer. Click **Submit**. A task will be issued to the Capacity Auction Contact of the receiving organization.	
6	Task: Accept Capacity Obligation Transfer	

Step	Instruction	Picture
	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: • 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). Once a CAR has been selected, the Revised Capacity Obligation, Revised Cleared ICAP and Price will be displayed. Note: A revised blended capacity auction clearing price will be determined for transfers between zones with different clearing prices. Click **Accept**, and the request will go to the IESO for approval.	

Step	Instruction	Picture
	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.	
7	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.	<See steps for CMP authorization, Register a Resource and Assign Resource to Capacity Obligation>

Step	Instruction	Picture
8	If the transfer is to your own organization, the screen will display your available CAR data for the selected obligation period. 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. 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. Click **Submit**, and the request will go to the IESO for approval. As part of the approval process, the IESO will evaluate whether any additional deposit or prudential amount is required and will coordinate this accordingly. You can view your transfer request details under the **Capacity Obligation Transfer Request** record.	

News Tasks (25) Records Reports Actions

Submit Capacity Obligation Transfer Request

Organization: FWRN LP (125440)

Request Number: 301

Please note that all capacity obligation transfer requests are subject to IESO approval.

Capacity obligation transfer for 2032 SUMMER (5/1/2032 - 10/31/2032)

Transfer Amount: 1 MW

Obligation Period: 2032 SUMMER

Capacity transferor's Capacity Auction Resource

CAR Name	CAR Type	Zone	Type	Initial Capacity (MW)	New Capacity (MW)	Price $
MIDDLEPORT-LT	Virtual Hourly Demand Response - C&I	SOUTHWEST	VIRTUAL	90.9	89.9	300.00

Capacity transferee's Capacity Auction Resource *

Select the CAR to which you want to transfer the capacity obligation and click 'SUBMIT'

	CAR Name	CAR Type	Zone	Type	Capacity Obligation (MW)	Surplus Capacity (MW)	Revised Capacity Obligation (MW)	Price $
☑	BRUCE-LT.	Virtual Hourly Demand Response - C&I	BRUCE	VIRTUAL	47.7	4.1 - 1 = 3.1	48.7	300.00

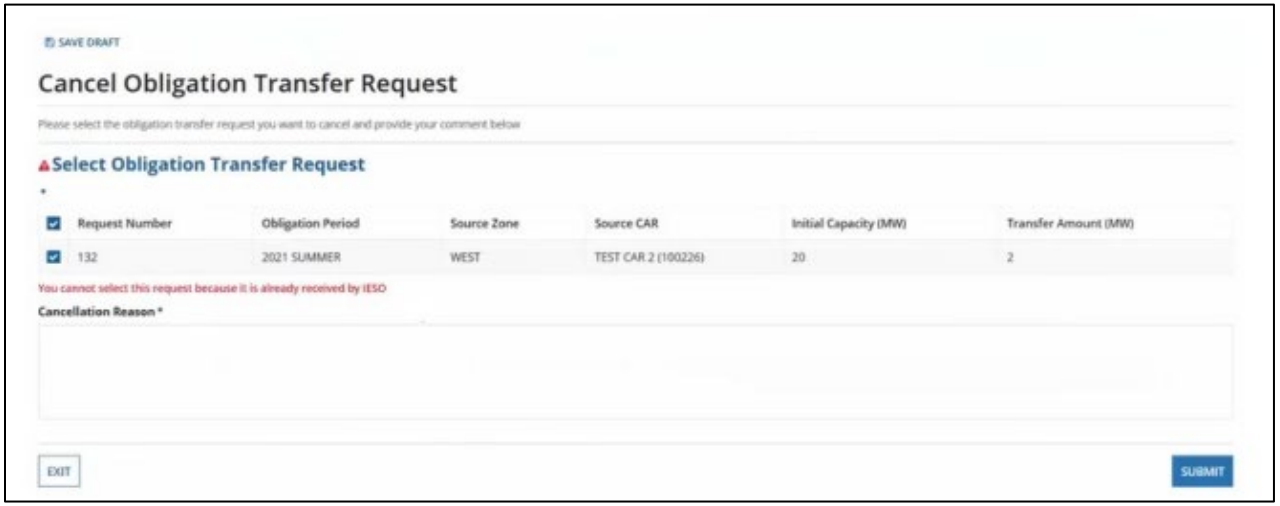
The capacity auction resource are filtered to show only those that are eligible to accept the transferred capacity subjected to system limits and market rules

Submission Comments

BACK

CANCEL

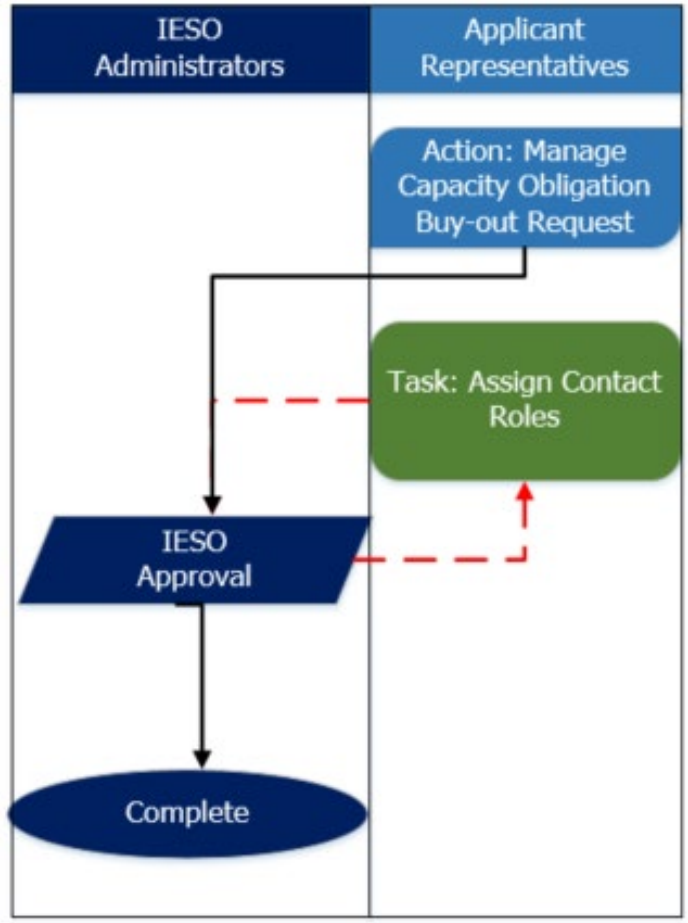
SUBMIT

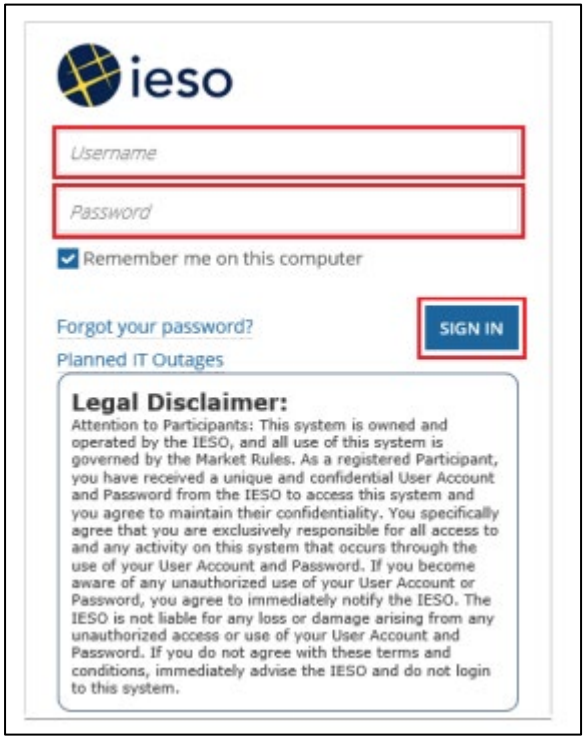
Step	Instruction	Picture
9	If your submitted transfer is to another organization and you wish to cancel, you may do so up to the point the receiving organization processes their task. **Note**: Once the task is processed by the Transferee, the option to cancel is not available. To cancel, click **Actions** 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. 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.	

Step	Instruction	Picture
	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.	

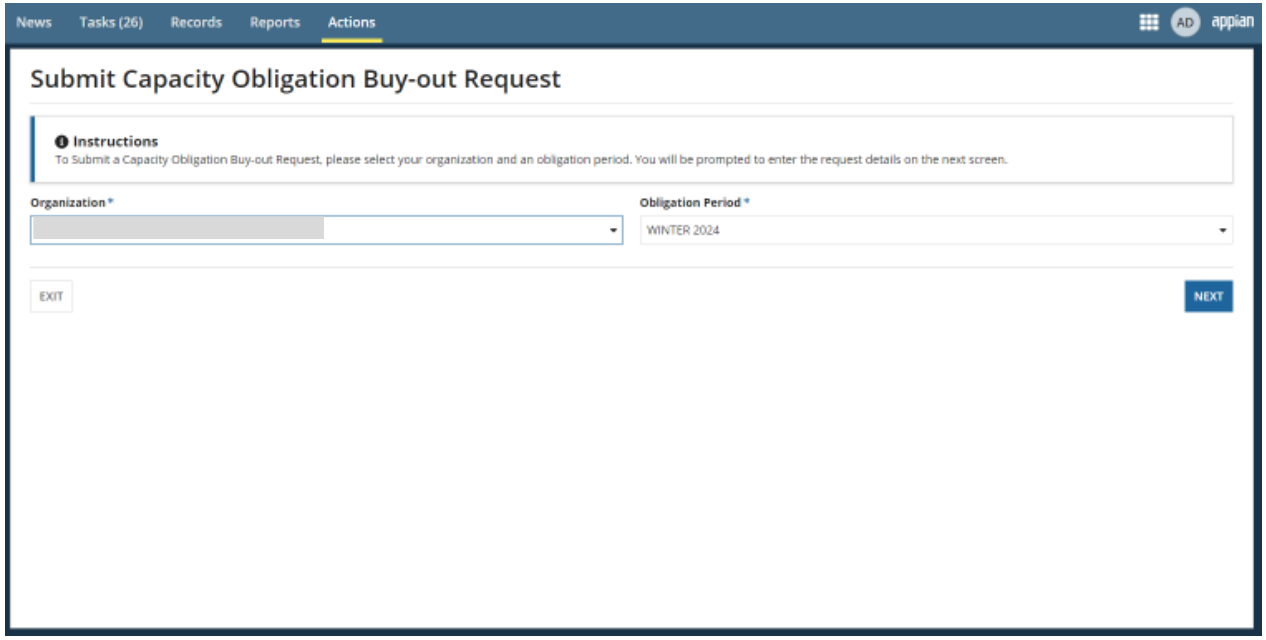
11. How to Complete a Capacity Obligation Buy-out Request

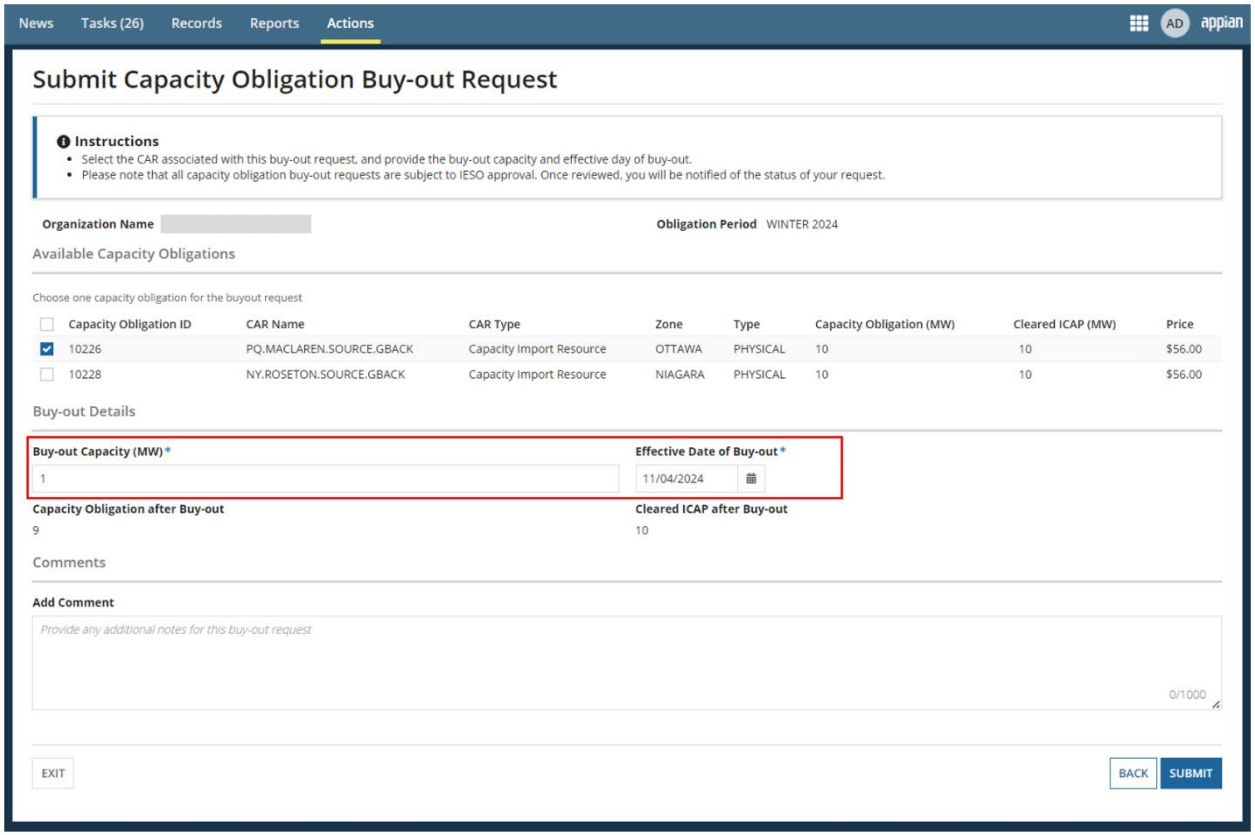
The following table provides step-by-step instructions, with accompanying screen captures, describing the process for completing a capacity obligation buy-out request using the Online IESO web-based system.

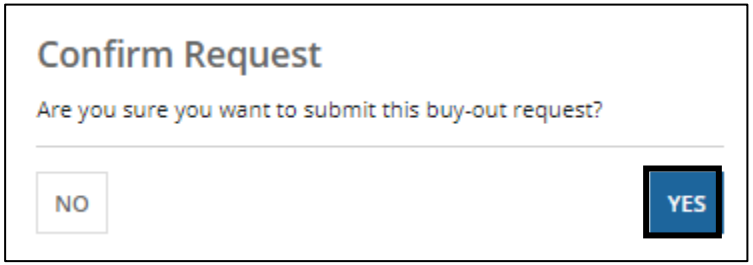


Step	Instruction	Picture
1	Action: Manage Capacity Obligation Buy-out Request The Capacity Auction Contact is the contact role that can submit a buy-out request. Log in to the Online IESO web-based registration system using this link. Enter your Username and Password and click **Sign In**.	

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

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

Step	Instruction	Picture
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	A dialog box will display asking you to confirm the submission of the buy-out request. Click **Yes**. 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. You may also go to the **Records** page to view the buy-out requests submitted and their status under **Capacity Obligation Buy-out Requests**. Note: A buy-out request cannot be withdrawn once it is submitted.	

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)