

Checklist for Demand Response Resources seeking Telemetry

Checklist for Demand Response Resources seeking Telemetry is a requirement of market participation for a Proxy Demand Response (PDR) with a rated capacity (Pmax) greater than or equal to 10 MW. It is also required for a PDR that requests certification to provide non-spinning and spinning reserve at any rated capacity (Pmax).

Resources under 10 MW may participate in CAISO energy markets while undergoing NRI process for Ancillary Service certification as long as there is an approved GRDT. Outages will need to be submitted for required testing periods.

To make a request, the DRP/SC shall submit a Project Request Form to NewResourceImplementation@caiso.com to initiate the Resource Modeling process. Telemetry request shall follow the Full Network Model schedule. The following additional information may be requested for a PDR that requires telemetry.

| Telemetry | |
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| Project Details submitted to RIMS upon receiving it from DRP | Yes |
| IFC Electrical Drawings Document Title: SLD (See New Resource Implementation (NRI) Guide) | Yes. SLD does not require a PE stamp, but should show simplified schematic of metering arrangement and generation device specifications for each site in the aggregation. |
| Communication Block Diagram Document Title: CommBlock (See New Resource Implementation (NRI) Guide) | Yes. For PDR, Communication Diagram <i>should</i> show virtual communications pathways between telemetry device, RIG, and CAISO. Note that PDRs will frequently use a cloud-based RIG in lieu of physical RIG unit on each site. |
| AT&T IP or ISP static address Document Title: RIGDetails (See New Resource Implementation (NRI) Guide) | Yes |
| Resource owner approval of the RIG Database spreadsheet of required telemetry points** Document Title: InitialRIGDB | Yes |
| Control Room Info - 24/7 contact information Document Title: 24HourContact (See New Resource Implementation (NRI) Guide) | Required |

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| Device Certificate Request Form for RIGs | Yes |
| Email notification from resource owner stating site has witnessed and approved of the RIG pretesting. | Yes Note: Demand Response Provider notification as resource owner |
| Submit a request through the EDAS Fieldwork Request Tool to schedule CAISO point-to-point | Yes |
| CPS Subscriber Agreement for Remote Intelligent Gateways Document Title: CPSAgreement (See New Resource Implementation (NRI) Guide) | Yes Note: one agreement will be applicable for multiple resources |
| Network Connectivity Security Requirements and Agreement Document Title: ECN Agreement (See Guide Above) Document Title: ECN Agreement (See New Resource Implementation (NRI) Guide) | Yes Note: one agreement will be applicable for multiple resources |
| Telemetry testing completed | Yes |

Prior to making a request to establish telemetry with the CAISO the following must be completed:

- 1) Execute DRP Agreement
- 2) Request a DRP ID. Send this request to PDR@caiso.com. If existing DRP ID, skip this item.
- 3) Submit your Performance Evaluation Methodology Form to PDR@caiso.com. If using existing Performance/Baseline Methodology, skip this item.
- 4) Create Registration in DRRS with a "Confirmed" status to reserve your Resource ID. At least one location is required.
- 5) Verify if Resource requires Telemetry, Will the resource have a Pmax >= 10 MW or will the resource be seeking certification for spinning or non-spinning reserve?
 - a. If No, then
 - ii. If the performance evaluation methodology requested requires approval of a resource specific metering device (i.e. MGO, LSR, or EVSE), then Create a "SCME" project using the NRI Process and submit the SLD and SQMD Template to: NRI@caiso.com and CC: PDR@caiso.com.
 - b. If YES, create a "RIG Reconfiguration" Project in RIMS.

- Bucket 1 – At least 84 days before the date the PDR will be bidding into the market or will begin offering Ancillary Services into the market:

Submit a RIG details form through the RIMS UI.

- Bucket 2 – At least 40 days

Create a “SCME” project using the NRI Process and submit the SLD and SQMD Template to: NRI@caiso.com and CC: PDR@caiso.com.

- Bucket 3 – At least 30 days

Submit GRDT through RIMS UI.

- Bucket 4 - Trial operations approval - 10 days

Metering and telemetry Point to Point testing must be completed. Note that this must be scheduled at least 1 month in advance and cannot be scheduled until after resource has been modeled in the FNM.

- Bucket 5 - 1 day. Trial operations period. See Operating Procedure 5320. SC must contact ISO outage management 24 hours in advance of initial synchronization and again immediately before synchronization at the following numbers: i. Ops Planning North: 916-351-2206 ii. Ops Planning South: 916-351-2215

Note: For further details on how to create projects and each bucket items, please refer to the New Resource Implementation webpage at:
<http://www.caiso.com/participate/Pages/NewResourceImplementation/Default.aspx>.

For resources seeking Ancillary Service (A/S) certification, a test must be scheduled after the Resource ID has been implemented in the FNM Model and Point to Point testing has been completed. After the resource has passed the test, the SC may submit a Master File UI request to update the A/S flag.