

Demand Response Registration User Guide

Version 5.10

~~November~~ October 13, 2025~~1, 2024~~

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		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Table of Contents

1 INTRODUCTION.....64

1.1 Purpose.....64

1.2 Content and Organization.....64

1.3 Definitions.....86

1.4 Application Access.....119

1.5 DRRS Automated Email Notification.....1513

1.6 DRRS User Roles.....1513

2 DRRS FUNCTIONALITY OVERVIEW1615

2.1 Locations.....1615

2.2 Registrations.....1716

2.3 Application Layout.....1918

2.3.1.1 Role-based tab views.....1918

2.3.1.2 Column Headers.....2120

2.3.1.3 Sorting and Filtering Locations and Registrations.....2322

2.4 Actions.....2423

2.4.1.1 DRP Actions.....2423

2.4.1.2 UDC and LSE Actions.....3534

2.5 Location and Registration Status Lifecycle.....3635

2.5.1.1 Location Status Lifecycle Process Flow.....4039

2.5.1.2 Registration Status Lifecycle Process Flow.....4140

3 CREATING AND REGISTERING LOCATIONS AND RESOURCE:.....4241

3.1 Create a Location.....4241

3.1.1 Edit.....4645

3.1.2 Copy.....5755

3.1.3 Delete.....5957

3.1.4 Duplication Check.....6058

3.1.5 Defend.....6159

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 <u>10/13/2025</u>
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

3.1.6	Withdraw	6763
3.1.7	End Date	6965
3.2	Location Review	7066
3.2.1	LSE Review	7166
3.2.2	UDC Review	7368
3.2.3	Invalid Review Disputed Location	7772
3.2.4	LSE/UDC Review notification	8075
3.2.5	Application Programming Interface (API) Location Management	8176
3.3	Creating a Registration	8277
4	REGISTRATION MANAGEMENT	9388
4.1	DRRS User Interface (UI) Registration Management	9388
4.1.1	Edit	9488
4.1.2	Copy	9691
4.1.3	Terminate	9792
4.1.4	Delete	10194
4.2	Application Programming Interface (API) Registration and Resource Management	10396
5	HELPFUL LINKS	10497
6	REVISION HISTORY	109101
APPENDIX A – THREE (3) POSSIBLE CASES OF DEFEND PROCESS		113105
APPENDIX B – EDITABLE FIELD(S) BY LOCATIONS STATUS		117109
APPENDIX C - CUSTOMER MARKET RESULTS INTERFACE (CMRI)		121113
Viewing Total Expected Energy (TEE)		121113
APPENDIX D – TIPS FOR CREATING REGISTRATIONS BY BASELINE METHOD TABLE		123115
APPENDIX E - DRRS LOCATION DEVICE TYPE BUSINESS RULES AND BASELINE METHOD REFERENCE MATRIX		125117
APPENDIX F – EXAMPLE OF CREATING A REGISTRATION USING CONTROL GROUP BASELINE METHOD		129121

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 <u>10/13/2025</u>
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted

1	INTRODUCTION	4
1.1	Purpose	4
1.2	Content and Organization	4
1.3	Definitions	6
1.4	Application Access	9
1.5	DRRS Automated Email Notification	12
1.6	DRRS User Roles	13
2	DRRS FUNCTIONALITY OVERVIEW	14
2.1	Locations	14
2.2	Registrations	15
2.3	Application Layout	16
2.3.1.1	Role based tab views	16
2.3.1.2	Column Headers	19
2.3.1.3	Sorting and Filtering Locations and Registrations	21
2.4	Actions	22
2.4.1.1	DRP Actions	22
2.4.1.2	UDC and LSE Actions	33
2.5	Location and Registration Status Lifecycle	34
2.5.1.1	Location Status Lifecycle Process Flow	38
2.5.1.2	Registration Status Lifecycle Process Flow	38
3	CREATING AND REGISTERING LOCATIONS AND RESOURCE	39
3.1	Create a Location	40
3.1.1	Edit	44
3.1.2	Copy	54
3.1.3	Delete	56
3.1.4	Duplication Check	57
3.1.5	Defend	58
3.1.6	Withdraw	64

Formatted

Formatted

Formatted

Formatted

Formatted

Formatted

Formatted

Formatted

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 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 <u>10/13/2025</u>
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

3.1.7	End Date	65
3.2	Location Review	67
3.2.1	LSE Review	67
3.2.2	UDC Review	70
3.2.3	Invalid Review Disputed Location	74
3.2.4	LSE/UDC Review notification	77
3.2.5	Application Programming Interface (API) Location Management	78
3.3	Creating a Registration	79
4	REGISTRATION MANAGEMENT	92
4.1	DRRS User Interface (UI) Registration Management	92
4.1.1	Edit	92
4.1.2	Copy	94
4.1.3	Terminate	95
4.1.4	Delete	98
4.2	Application Programming Interface (API) Registration and Resource Management	100
5	HELPFUL LINKS	100
6	REVISION HISTORY	105
	APPENDIX A – THREE (3) POSSIBLE CASES OF DEFEND PROCESS	109
	APPENDIX B – EDITABLE FIELD(S) BY LOCATIONS STATUS	113
	APPENDIX C – CUSTOMER MARKET RESULTS INTERFACE (CMRI)	117
	Viewing Total Expected Energy (TEE)	117
	APPENDIX D – TIPS FOR CREATING REGISTRATIONS BY BASELINE METHOD TABLE	119
	APPENDIX E – DRRS LOCATION DEVICE TYPE BUSINESS RULES AND BASELINE METHOD REFERENCE MATRIX	120
	APPENDIX F – EXAMPLE OF CREATING A REGISTRATION USING CONTROL GROUP BASELINE METHOD	124

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Formatted

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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1 Introduction

1.1 Purpose

The Demand Response Registration System (DRRS) is the application developed to enable wholesale market participation by end-use customers, referred to as locations, under the PDR and RDRR participation models. The DRRS application facilitates the registration process which identifies the end-use customers providing load curtailment in response to a CAISO PDR/RDRR dispatch instruction. The system also performs a series of process controls, including data validation, duplication check and review process by LSEs and UDCs, to ensure the uniquely identified end-use customer is being registered appropriately and is not participating in overlapping registrations or retail programs.

The DRRS application provides a robust User Interface (UI) and Application Program Interface (API) to facilitate a streamlined registration process for all DRRS user roles. —This includes an API for uploading bulk location data to accommodate the input of volumes of locations participating, in aggregate, as PDR/RDRRs. Additional DRRS APIs are provided for the creation, modification, review and termination of locations and their registrations.

Business process will not be covered in this User Guide, please refer to Business the Business Practice Manual (BPM) for Demand Response.

1.2 Content and Organization

The purpose of the guide is to instruct users how to use the features of the Demand Response Registration System (DRRS) User Interface. This guide describes the DRRS application layout, as well as the steps for creating Locations and Registration.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

Other applications that may be applicable, and are utilized by Scheduling Coordinators who ~~participates~~participate in Demand Response will **not** be discussed in this User Guide, please refer to its respective manuals/documentations. All Technical documentations are located on the CAISO website at:

<http://www.caiso.com/participate/Pages/ApplicationAccess/Default.aspx>

- [Market Results Interface](#) – Settlements (MRI-S) application access is required to submit performance and load values to MRI-S by the Scheduling Coordinator (SC).
- [Master File User Interface](#) – This application is used to submit RDT updates, and ~~may~~can also be used to generate reports such as:
 - Generator RDT Report
 - Use Limit Plan (ULPDT) Report
 - Resources with Approved Changes
- The [Customer Interface for Resource Adequacy \(CIRA\)](#) application is used to manage ISO's resource adequacy needs by the Scheduling Coordinator. This application allows the SC to submit their Net Qualifying Capacity (NQC), annual and monthly Supply and Resource Adequacy (RA) Plans. This application also provides the capability for an SC and ~~aan~~ LSE to provide generic and flexible RA capacity information to the ISO using their Supply and RA Plans.
- [Customer Market Results Interface \(CMRI\)](#) – This Application may be used to generate the ~~following~~ reports listed below. [Appendix D](#) provide screenshots of viewing binding schedules and awards for Demand Response.
 - Total Expected Energy (TEE)
 - Real-time Unit Commitment (RTUC)
 - Fifteen Minute Market (FMM).
- [Scheduling Infrastructure and Business Rules \(SIBR\)](#) – SIBR provides an SC interface to submit Bids and Inter-SC Trades (IST). For Demand Response, SIBR will utilize the bid dispatchable options registered in the Master File.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

- Automated Dispatch System (ADS) - ADS user interface displays commitment instructions, energy instructions, and ancillary services awards from the real-time market application. The energy instructions ~~displaysdisplay~~ 5-minute dispatch operating target (DOT) for Demand Response.

1.3 Definitions

The following defined terms and acronyms are used throughout this document:

Terms	Definition
AARF	Application Access Request Form – method used to provision access to users of the DRS
Address information	The physical address of the location.
ADS	Automated Dispatch System
AIM	Access Identity Management (AIM) application. The application provides registered UAAs with the ability to view application-level access for all of their organization’s users as well as any users from other organizations who have access to their resources (endorsed users).
AIMS	Access and Identity Management System – application used to provision access to users of the DRRS
API	Application User Interface. Allows users to upload bulk location data to accommodate the input of the volume of locations participating in the Demand Response Program.
BTM	Behind-the-meter (BTM) refers to a connected device that is ‘behind’ the user’s utility service meter from the perspective of the utility. Therefore, the BTM connected device is considered a retail consumer of electricity.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

Terms	Definition
Custom Resource ID	A unique resource ID requested by the DRP, modeled with their specified nodal locations and associated generation distribution factors (GDF).
Customer	The name of the customer that user assigned during the registration process.
Device Type	The physical device that is installed at the service account location. This can either be Energy Storage, Electric Vehicle Supply Equipment or both.
DLA Resource	The DLAP in which the Locations of the Registration resides.
DLAP	Default Load Adjustment Point
DRP	Demand Response Provider
DRP SC	Demand Response Provider Scheduling Coordinator who are <u>is</u> responsible for submitting bids into the market and meter data to the MRI-S.
DRRS	Demand Response Registration System. Allows users to create large volumes of locations and aggregate locations for participation in the ISO's demand response program.
DRRS UI	Demand Response Registration System User Interface
End Date	End date of registration. The end date when the Registration will become inactive.
Endorsed User	Individual(s) outside of the company that is requesting for application access.
ES	Energy Storage. Technologies capable of charging energy from an external source and discharging this energy at a later time, after some amount of the initial energy is lost.
EVSE	Electric Vehicle Supply Equipment

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

Terms	Definition
Load Reduction	The total Load Reduction capacity per location.
Location name	Identifies the location/site for the user.
Locations	Physical location of the demand response entity. This includes the customer data such as the service account number, physical service location, and curtailable load amounts.
LSE	Load Serving Entity
New Custom PDR	CAISO will develop a new resource ID for this registration (custom).
PDR	Proxy Demand Resource
PDR-LSR	Proxy Demand Resource – Load Shift Resource. An enhancement of the PDR participation model that facilitates participation of both curtailment and consumption of load.
Pnode	Pricing Node - A single network Node or subset of network Nodes where a physical injection or withdrawal is modeled and for which a Locational Marginal Price is calculated and used for financial settlements.
POC	Point of Contact, now referred to as UAA.
Pre-Defined Resource ID	A pre-established resource ID pre-modeled in each SubLAP based on CAISO specifications and available in the Master File for DRP to request assignment to a registration.
RDRR	Reliability Demand Response Resource
RegID	The registration ID number assigned to the registration by the Demand Response System; this ID is assigned by the DRRS in sequential order.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

Terms	Definition
Registration	Comprised of a single location or an aggregation of many locations. Submitted by the DRP to the LSE and UDC for review and CAISO for approval. Meter data is also submitted at the registration level for the baseline calculation prior to the market participation.
Resource ID	A unique ID used for participation in the ISO wholesale markets (scheduling/bidding and settlements). Assigned by the CAISO during the registration process in the Demand Response Registration System. Resource specific information for the ID resides in the ISO Master File.
SAN	Service Account Number. Unique number assigned to a location by the UDC. Dashes or any other special characters are not allowed for the location SAN.
Start Date	Start date of the registration (cannot overlap with existing registration for the same location).
SubLAP	One of the 23 SubLAP locations of CAISO. The SubLAP in which all the locations within the registration reside.
UAA	User Access Administrator, formerly known as the POC.
UDC	Utility Distribution Company. The UDC in which the Locations in the Registration reside and is part of the approval process.
UDC Account #	This is the account number a DRP receives from a UDC for billing.

1.4 Application Access

This user guide will address the Demand Response Registration System (DRRS) application.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

DRRS access is required for a DRP to submit locations, registration, and resource management processes in order to establish a PDR/RDRR resource ID for market participation.

DRRS access is required for LSEs and UDCs to manage the review process of locations submitted by the DRP.

Access to **DRRS** can be obtained through the organization's **User Access Administrator (UAA)** via the **Access Identity Management (AIM)** application.

The **UAA** is the designated User Access Administrator for the organization that is managing their user's application access. More information on how to become a UAA can be found at <http://www.caiso.com/participate/Pages/UserAccessAdministratorGuide/Default.aspx>

The **AIM** User Interface (UI) is an application that provides registered UAA with the ability to view application-level access for all of their organization's users as well as any users from other organizations who have access to their resources (Endorsed users). More information can be found at http://www.caiso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf

The **AARF (Application Access Request Form)** is no longer used by the UAAs to submit application access. All access requests shall be performed through the AIM UI application.

To request **DRRS** application access, the following shall occur:

In AIM, for existing ~~using user~~users within the organization, the UAA shall:

- Go to the **Access Request** tab
- Click on the pencil icon
- Click on the **New Row** button
- Type in a brief description
- Click **Update**

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

- Go to the **Select Users** tab
- Select the user from the **Available Users** column and click **Add** to move them over to the **Selected Users** column on the right side
- Go to the **Select Application and Roles** tab
- Select the appropriate roles from the **Available Applications/Roles** column.
 - For the **DRP role**, select *EXTERNAL DRP*
 - For the **LSE role**, select *EXTERNAL LSE*
 - For the **UDC role**, select *EXTERNAL UDC*
- Be sure to update the applicable Action, Application, Role, Environment, and Entity
- Click **Update** to save the roles.
- Next, click the green **Preview** button, which will open a submission window
- Click **Submit** to finalize the request.

In the order to provision user for the “EXTERNAL LSE” or EXTERNAL UDC” role for DRRS in AIM, the UAA must have the following contract types in the AIM profile.

- DR LSE (Demand Response Load Serving Entity)
- DR UDC (Demand Response Utility Distribution Company)

If the UAA does not have this contract type, they will need to submit a new UAA Agreement form to add these contract types into their UAA profile.

Below is a screenshot of the contract type from the UAA Agreement form. Please check the Demand response box and list the LSE and or UDC ID in the corresponding field.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

☐ Basic UAA (Market Participant Portal only)

☐ Scheduling Coordinator Agreement (for SCs in the physical market)

☐ Convergence Bidding Agreement (for SCs in the financial market only)

☐ Congestion Revenue Rights Entity Agreement

☐ CIRA only (for Load Serving Entities to submit RA plans)

☐ CIRA only (for Local Regulatory Authorities)

☐ Demand Response

☐ EIM Entity Scheduling Coordinator

☐ EIM Participating Resource Scheduling Coordinator

☐ Adjacent Reliability Coordinator

☐ Reliability Coordinator (RC) Customer Transmission Operator

☐ Reliability Coordinator (RC) Customer Balancing Authority

☐ Transmission Owner

☐ RIMS for Interconnection Customers

(Enter only project codes. Do not enter resource IDs. Please attach project code confirmation email for new project if available. This will help to expedite the validation process.)

~~Submit~~Submitting a request for both the production and market simulation/map stage environments is recommended.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

1.5 DRRS Automated Email Notification

The DRP shall send contact information using a CIDI ticket with the Subject Line "Demand Response Automated Email." A common email distribution list is **required**. The Contact(s) will receive automated email notifications from DRRS of Location and/or Registration status change and when the **defense** process has been initiated for an existing location, in an active or inactive status, that needs the incumbent DRP's attention.

Common Email Address (this is a group group email distribution list will be used for DRRS email notifications)	Organization Name	DRP ID

1.6 DRRS User Roles

There are three types of user roles for this application.

Entity	Read Access Only	Read Write Access	Brief Description of the entity (DRP, LSE, UDC, ISO)
DRP		X	DRP can create, modify and end-date locations and create, modify and terminate registrations.
UDC	X		UDC can review and submit comment(s) on location info and view registrations containing those locations
LSE	X		LSE can review and submit comment(s) on location info and view registrations containing those locations.

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 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 <u>10/13/2025</u>
DEMAND RESPONSE REGISTRATION USER GUIDE			

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2 DRRS Functionality Overview

In DRRS, there are two functionality tabs: (1) Locations, (2) Registrations

1. **Location** tab – Allows the DRP to Create, Copy, Delete, Defend, Withdraw, Edit, End Date and Register locations. The UDC and LSE can **review** locations and registrations in which associated locations are assigned.
2. **Registration** tab – Allows the DRP to Create, Edit, Copy, Terminate, and Delete registrations. The UDC and LSE can view registrations and location(s) associated ~~to~~with the registration.

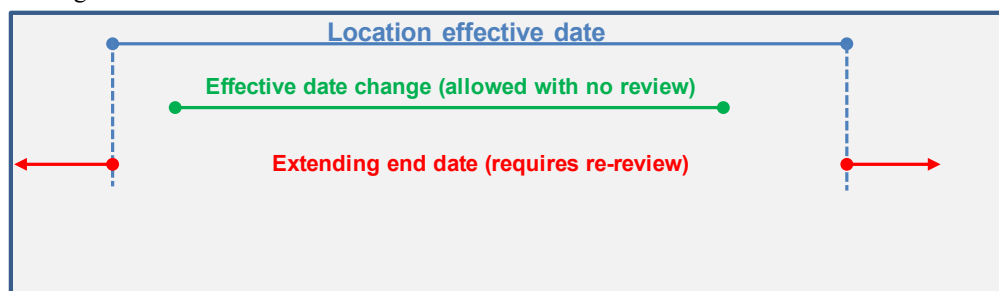
2.1 Locations

- Require effective dates (Start Date and End Date) which provides flexibility in creating and processing registrations. (see example in ~~figure~~Figure 1 below)
- Start Date and End Dates cannot be prior dates.
- Can be created individually via UI or in bulk using web service API.
- Cannot be added or removed from a Confirmed registration.
- Once submitted, can be end-dated or edited, but not deleted.
- Provides DRP control in their use in creating registrations
- The **green** line allows for locations to move in and out of registrations without additional UDC or LSE review. The **red** arrows for locations indicate that locations requires re-review by the UDC and LSE.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Figure 1



2.2 Registrations

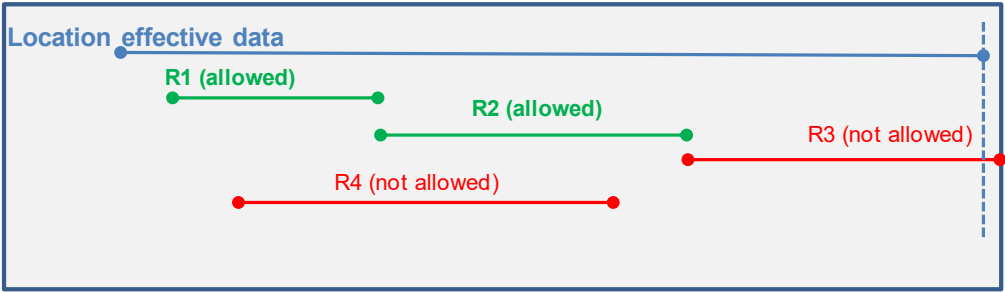
- Effective dates are validated against location effective dates.
- Multiple registrations can be created within location effective dates so long as they do not overlap (see example in Figure 2 below)
- Can be created using web service API or UI.
- Can be created when reviewed locations are available.
 - Includes location validations that may result in processing errors (i.e. location being used in another registration during effective dates)
- May be affected by edits made to location attributes.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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- Once confirmed, can be terminated but not deleted.
- Effective dates determine associated Resource effective dates.
- One Registration to one Resource relationship (1:1) maintained

Figure 2



 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

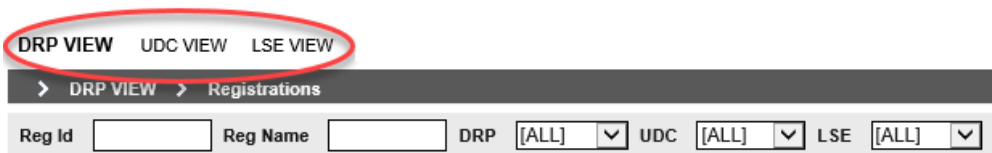
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2.3 Application Layout

2.3.1.1 Role-based tab views

In DRRS, there are three (3) different role-based tab views. The views that are accessible to the users will be determined by the number of roles provisioned on the digital CMA certificate.

1. **DRP View** – This tab will be visible to users that log in with the **DRP** role. Users can have multiple views if the users have multiple roles.
2. **UDC View** – This tab will be visible to users that log in with the **UDC** role.
3. **LSE View** – This tab will be visible to users that log in with the **LSE** role.



To access the Location or Registration functionality, users can place their cursor over the applicable tab(s) (**DRP VIEW**, **UDC VIEW** or **LSE VIEW**). The Locations and Registration screens are accessible under the corresponding views.

DRP VIEW, **UDC VIEW** or **LSE VIEW** selection shows all the locations assigned to that entities ID or filtered view showing a subset of that entities locations.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

Example: LSE VIEW Locations

LSE VIEW

> LSE VIEW > Loc

Locations

Registrations

LOC ID SAN DRP [ALL] UDC [ALL] LSE [ALL] SUBLAP [ALL] Updated Since DateTime

LTEST

Locations

1 - 25 of 907916

GO

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	DEVICE TYPE	PNODE	Start Date	End Date	Review Start	Review
---------------	------	-----	-----	-----	-----	--------	-------------	-------	------------	----------	--------------	--------

Additionally, DRP VIEW, UDC VIEW or LSE VIEW will show all registrations comprised of locations assigned to that entities ID or filtered view showing a subset of locations

Example: LSE VIEW Registrations

LSE VIEW

> LSE VIEW > Re

Locations

Registrations

Reg Id DRP [ALL] UDC [ALL] LSE [ALL] SUBLAP [ALL] Updated Since DateTime

LTEST

Registrations

1 - 25 of 28054

GO

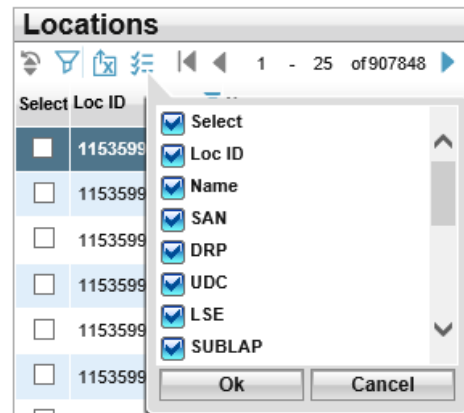
Reg ID	Name	DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource ID	Resource Type	Program	Baseline Method
--------	------	-----	-----	-----	--------	------	--------	-------------	---------------	---------	-----------------

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

2.3.1.2 Column Headers

In the **Locations** tab, users can choose what columns they would like visible at any time. These options include: Loc Id, Name, SAN, DRP, UDC, LSE, SUBLAP, Device Type, PNODE, Start Date, End Date, Status, Defense Active, Defense Start, Defense End, Updated By and Updated Date.



 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

Search Parameters

Locations: Allows users to search using any of the available following criteria: (1) LOC ID, (2) LOC Name (3) SAN, (4) DRP (5) UDC, (6) LSE, (7) SUBLAP.

DRP VIEW

DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP Defense Active Updated Since DateTime

Create Copy Delete Defend Withdraw Edit End Date Register

Registrations: Allows users to search using the following criteria: (1) Reg ID, (2) Reg Name (3) DRP ID (4) UDC ID, (5) LSE ID, (6) SUBLAP.

DRP VIEW

DRP VIEW > Registrations

Reg ID Reg Name DRP UDC LSE SUBLAP Updated Since DateTime

Create Edit Copy Terminate Delete

Registration

1 - 25 of 27970 GO

Select Reg ID Name

DRP UDC LSE SUBLAP DLAP DRP SC Resource ID Resource Type Program Baseline Method Start Date End Date Status

Rows 25

2.3.1.3 Sorting and Filtering Locations and Registrations

Sorting from ascending to descending by clicking on any of the column headers. Multiple column headers can be sorted either ascending or descending.

Locations

1 - 25 of 907848 GO

Select Loc ID Name SAN DRP UDC LSE SUBLAP Device Type PNODE Start Date End Date Status Defense Defense Defense Active? Start End

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Users can also use the inline filtering option . The inline filter works as a toggle. Click the icon to filter data based on the content of a particular column. Press Enter after inputting the filter criteria. Please note that wildcard symbols can be used in this column, but are not necessary.

Registrations

   1 - 25 of 27970 **GO**

Select Reg ID Name **DRP**

2.4 Actions

In DRRS, the action buttons are role-based. Actions provided are determined by the role provisioned for the user.

2.4.1.1 DRP Actions

Locations: Create, Copy, Delete, Defend, Withdraw, Edit, End Date, Register

DRP VIEW

> DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP

Create Copy Delete Defend Withdraw Edit End Date Register

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Registrations: Create, Edit, Copy, Terminate, Delete

DRP VIEW

> DRP VIEW > Registrations

Reg Id

Reg Name

DRP

[ALL]

▼

UDC

[ALL]

▼

LSE

[ALL]

▼

Create

Edit

Copy

Terminate

Delete

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Under the **DRP** action, the **Create** button is used when a location is being created for the first time. When **DRP** selects the **Create** button, the “Create New Location” view will appear as shown in the figure below. All required fields will be designated with an asterisk.

DRP VIEW

> **DRP VIEW** > **Create New Locations**

Create New Location

Name*

SAN*

Start Date*

End Date*

DRP*

UDC*

LSE*

SUBLAP*

PNODE

Address 1*

Address 2

City*

State*
California

Zip*

Address Type

Device Type

Cancel

Save

Submit

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP Copy provides the ~~user~~user with the ability to copy a previously created location. The user must first select the location to be copied (1) then the **Copy** button (2). The copied location information will be ~~presented~~presented, and all fields will be editable. This action is provided for cases where the user is creating multiple locations with the same key fields, reducing the effort in having to create each independently.

DRP VIEW

> DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP Defense Active Updated Since DateTime

Create Copy Delete Defend Withdraw Edit End Date Register

Locations

1 - 25 of 907860 GO

Select L 1

	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	
☒	11536993000151	LOC_TEST_12_CTRLGP151	SAN_TEST_12_CTRLGP151						06/10/2020	06/30/2020	End Dated	

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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> DRP VIEW > Create New Locations

Create New Location

Name*

SAN*

Start Date*

End Date*

DRP*

UDC*

LSE*

SUBLAP*

PNODE

Address 1

City*

State*

Zip*

Address Type

Device Type

Update Fields

Save as Draft

Cancel

Save

Submit

DRP DELETE action is usable when a location has been previously created. **DELETE** is only actionable for certain location statuses (Draft/New), and any other status will receive an error as seen in the example below.-

DRP VIEW

> DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP Defense Active Updated Since DateTime

Create Copy Delete Defend Withdraw Edit End Date Register

Locations

1 - 25 of 907860 GO

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defense Active?
☐	11535993000151 LOC_TEST_12_CTRLGP151	SAN_TEST_12_CTRLGP151							06/10/2020	06/30/2020	End Dated	
☐	11535993000150 UD_TEST_12_CTRLGP150	SAN_TEST_12_CTRLGP150							05/20/2020	06/16/2020	End Dated	
☒	11535993000149 LOC_TEST_12_CTRLGP149	SAN_TEST_12_CTRLGP149							05/20/2020	12/30/2021	Active	
☐	11535993000148 UD_TEST_12_EDIT	SAN_TEST_12_CTRLGP148							05/20/2020	12/29/2020	Active	
☐	11535993000147 LOC_TEST_12_CTRLGP147	SAN_TEST_12_CTRLGP147							05/20/2020	06/30/2020	End Dated	
☐	11535993000146 LOC_TEST_12_CTRLGP146	SAN_TEST_12_CTRLGP146							05/20/2020	12/30/2021	Active	
☐	11535993000145 LOC_TEST_12_CTRLGP145	SAN_TEST_12_CTRLGP145							05/20/2020	12/30/2021	Active	
☐	11535993000144 LOC_TEST_12_CTRLGP144	SAN_TEST_12_CTRLGP144							05/20/2020	12/30/2021	Active	
☐	11535993000143 LOC_TEST_12_CTRLGP143	SAN_TEST_12_CTRLGP143							05/20/2020	12/30/2021	Active	
☐	11535993000142 LOC_TEST_12_CTRLGP142	SAN_TEST_12_CTRLGP142							05/20/2020	12/30/2021	Active	
☐	11535993000141 LOC_TEST_12_CTRLGP141	SAN_TEST_12_CTRLGP141							05/20/2020	12/30/2021	Active	
☐	11535993000140 LOC_TEST_12_CTRLGP140	SAN_TEST_12_CTRLGP140							05/20/2020	12/30/2021	Active	
☐	11535993000139 LOC_TEST_12_CTRLGP139	SAN_TEST_12_CTRLGP139							05/20/2020	12/30/2021	Active	
☐	11535993000138 LOC_TEST_12_CTRLGP138	SAN_TEST_12_CTRLGP138							05/20/2020	12/30/2021	Active	

07/02/2020 11:52:30 Selected Locations cannot be Deleted. Only Draft/NEW locations can be deleted.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP Defend is actionable by a **DRP** that has been notified by another **DRP**, referred to as the prospective **DRP**, that the defense process has been initiated for an existing location, in an **a**Active or **i**nactive status, of theirs.

To defend a location, the **DRP** for the existing location, referred to as the incumbent **DRP**, must first select the location then the **Defend** button.

DRP VIEW

> DRP VIEW > Locations

LOC ID LOC Name SAN UDC LSE SUBLAP Defense Active Updated Since DateTime

Create Copy Delete Defend Withdraw Edit End Date Register

Locations

1 - 25 of 907860 GO

Select	Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defens Active?
☐	11535993000151	LOC_TEST_12_CTRLGP151	SAN_TEST_12_CTRLGP151							06/10/2020	06/30/2020	End Dated	
☐	11535993000150	UD_TEST_12_CTRLGP150	SAN_TEST_12_CTRLGP150							05/20/2020	06/16/2020	End Dated	
☒	11535993000149	LOC_TEST_12_CTRLGP149	SAN_TEST_12_CTRLGP149							05/20/2020	12/30/2021	Active	

The incumbent **DRP** will then have an opportunity to respond to the comments submitted by the prospective **DRP**. In the defend locations screen, the incumbent **DRP** ~~has the ability to can~~ either accept or reject the Defend request.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP Withdraw action is usable when a location has been previously created and submitted for review but **has** not completed the review process. To withdraw a location, the user must first select the location then the **Withdraw** button. The ~~DRP~~ will be required to provide contact information prior to submitting the location to the ~~defend~~**Defend** process.

DRP VIEW | UDC VIEW | LSE VIEW | ADMINISTRATION

DRP VIEW Confirm Withdraw Locations

Locations To Be Withdrawn

1 - 1 of 1

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE	Start Date	End Date	Location Status		
DPGE	UPGE	LPGE	SLAP_PGCP	NORCO_1_N001	DAPX	UPGE	LPGE	SLAP_PGCC	1	09/01/2016	09/01/2017	Pending

Are you sure you want to Withdraw above Locations?

Cancel

Continue

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP Edit action is usable when a location has been previously created. To edit a location, the user must first select the location then the **Edit** button. The location information will be presented to the user with available fields that are editable. Editable fields will be dependent on the location's status.

DRP VIEW

> DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP Defense Active Updated Since DateTime

Create Copy Delete Defend Withdraw Edit Update Register

Locations

1 - 25 of 907860 GO

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defen Activ
☐ 11535993000151	LOC_TEST_12_CTRLGP151	SAN_TEST_12_CTRLGP151							06/10/2020	06/30/2020	End Dated	
☐ 11535993000150	UD_TEST_12_CTRLGP150	SAN_TEST_12_CTRLGP150							05/20/2020	06/16/2020	End Dated	
☒ 11535993000149	LOC_TEST_12_CTRLGP149	SAN_TEST_12_CTRLGP149							05/20/2020	12/30/2021	Active	

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP VIEW

> DRP VIEW > Edit Location

Edit Location

Gray areas are non-modifiable

LOC ID

11535993000149

SAN*

SAN_TEST_12_CTRLGP149

NAME*

LOC_TEST_12_CTRLGP149

Start Date*

05/20/2020

End Date*

12/30/2021

DRP*

UDC*

LSE*

SUBLAP*

PNODE

Address 1*

250 Crop Circle Way

Address 2

Suite 15G

City*

Folsom

State*

California

Zip*

95687

Address Type

Business

Status

Active

Device Type

Cancel

Update

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP End Date ~~action is~~ actionable only under certain location statuses. NOTE: ~~ending~~ Ending a location may impact the effective dates of a registration. To End Date a location, the user must first select the location then the **End Date** button. The **DRP** will be required to confirm that they want to End Date the location prior to it being processed. Using the **End Date** action does not allow the **DRP** to select an end date. ~~but~~ Instead, the new end date will correspond with to the date that the action was taken. The **DRP** must use the **Edit** action to End Date a location for a ~~different~~ specific date.

DRP VIEW
UDC VIEW
LSE VIEW

DRP VIEW
Confirm End Date Locations

Locations To Be End Dated

1
-
1
of
1

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE Start Date	End Date	Location Status
DPGE	UPGE	LPGE	SLAP_SCLD				05/04/2016	06/03/2016	Inactive

Are you sure you want to End Date above Locations?

Cancel
Continue

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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2.4.1.2 UDC and LSE Actions

Locations: Review

UDC VIEW

Locations

LOC ID LOC Name SAN DRP

[ALL]

 UDC

[ALL]

 LSE

[ALL]

 SUBLAP

[ALL]

 Updated Since DateTime

Review

Locations

Registrations: View Location

UDC VIEW

Registrations

Reg ID Reg Name DRP

[ALL]

 UDC

[ALL]

 LSE

[ALL]

 SUBLAP

[ALL]

 Updated Since DateTime

Registrations

Rows 25

Reg ID	Name	DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource ID	Resource Type	Program	Baseline Method	Start Date	End Date	Status
11544082	Reg Test count1	t							Pre Defined	Reliability DR	Control Group	07/01/2020	08/01/2020	New

Locations

Rows 25

Loc ID	SAN	Resource ID	Start date	End date	Device Type	Distribution Factor	Control Group?	Treatment Group?
11535793000023	SAN_TEST_SCE_2REG23		05/20/2020	12/30/2021				View Location
11535793000026	SAN_TEST_SCE_2REG26		05/20/2020	12/30/2021				View Location
11535793000028	SAN_TEST_SCE_2REG28		05/20/2020	12/30/2021				View Location
11535993000001	SAN_TEST_12_CTRLGP1		05/20/2020	12/30/2021				View Location
11535993000002	SAN_TEST_12_CTRLGP2		05/20/2020	12/30/2021				View Location
11535993000003	SAN_TEST_12_CTRLGP3		05/20/2020	12/30/2021				View Location
11535993000004	SAN TEST 12_CTRLGP4		05/20/2020	12/30/2021				View Location

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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2.5 Location and Registration Status Lifecycle

DRRS Status	
Location	Registration
1. New 2. Processing 3. Pending 4. Inactive 5. Active 6. Withdrawn 7. End-Dated 8. Duplicate 9. Disputed	1. New 2. Pending 3. Confirmed 4. Terminated

DRRS	Statuses	Description
Location	New	Location will be set to this status when it is created and saved but not yet submitted for review.
	Processing	Location will be set to this status while being validated, when it is submitted for review.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRRS	Statuses	Description
	Pending	Location will be set to this status when it is submitted for review and validation has successfully completed. This status indicate <u>indicates</u> that the review process has been initiated for the location.
	Inactive	Location will be set to this status when it has successfully completed the review process but is not part of a registration that is in a ‘pending’ or ‘confirmed’ status.
	Active	Location will be set to this status when it is part of a registration that is in a ‘pending’ or ‘confirmed’ status.
	Withdrawn	Location will be set to this status when it is Withdrawn while in the pending, duplicate or disputed statuses.
	Duplicate	Location will be set to this status when, during the submittal validation, the location SAN for the same UDC is found to be used by another DRP.
	Disputed	Location will be set to this status when it has NOT successfully completed the LSE/UDC review process. Review process has resulted in invalidation findings.
	End Dated	Location will be set to this status when the effective end date of the location is prior to the current date. End dated locations are logically equivalent to deleted records.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRRS	Statuses	Description
Registration	New	Registration will be set to this status when it has been created but NOT yet submitted.
	Pending	Registration will be set to this status when it has been submitted <u>submitted</u> , and validation is in progress.
	Confirmed	Registration will be set to this status when it has been submitted <u>submitted</u> , and validation has successfully completed.
	Terminated	Registration will be set to this status when the effective end date of the registration is prior to the current date. End dated registrations are logically equivalent to deleted records.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

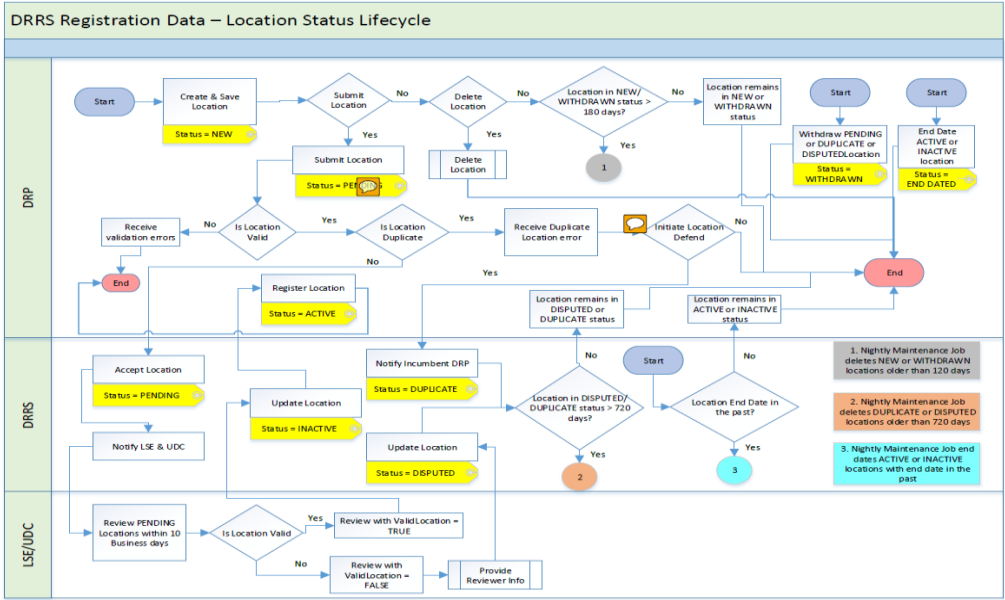
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Registration		
Status	Registration Status Description	Fields that can be edited
New	Created but NOT yet submitted.	All fields
Pending	Submitted and validation is in progress	Edit option not available, can only Terminate
Confirmed	Submitted and validation has successfully completed	Name, Start Date, End Date and Resource (if applicable)
Terminated	Effective end date of the registration is prior to the current date. End dated registrations are logically equivalent to deleted records.	Cannot be Edited, will receive an error message if attempted through UI or rejected if submitted with API

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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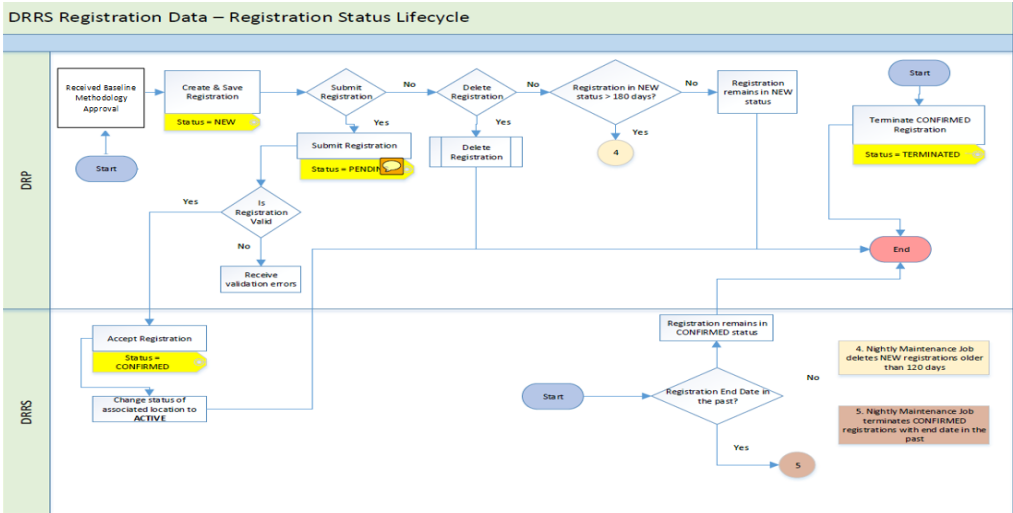
2.5.1.1 Location Status Lifecycle Process Flow



 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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2.5.1.2 Registration Status Lifecycle Process Flow



 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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3 Creating and Registering Locations and Resource:

For the DRP/SC, the DRRS facilitates three registration process components: manage locations, manage registrations, and manage resources. After the DRP receives approvals for Baseline methodologies, the process begins with creating the location(s) information into the DRRS, the LSE/UDC reviews and approves the location(s), DRP/SC creates registrations from one or many reviewed locations, registration is in “Confirmed” status, and the DRP/SC submits Generator Resource Data Template (GRDT) to be added to Master File.

For the UDC and the LSE, the DRRS facilitates a review process as part of the DRP’s management of locations. Once the DRP submits a location for review, the DRRS will perform data validation, including a duplication check for that location. If the data is valid, then the UDC and LSE ~~is~~^{are} notified that there is a location ready for review. The UDC and LSE have five (5) business days to complete their review and either submit with or without findings. If the five (5) business day elapses without a UDC or LSE acting on the review notification, the DRRS will auto approve the location. [Section 3.1.5 contains more information about the Defend process.](#)

3.1 Create a Location

The registration process builds from location to registration to resource management. The DRRS provides Location management which includes the creation of locations by the DRP, a duplication check by the DRRS, and an LSE and UDC review of the location to validate its use by the DRP for the established effective dates. The DRRS provides a robust UI and API's for the DRP(s), LSE(s) and UDC(s) use in performing their location management tasks. System generated email notifications are also generated as alerts to activities occurring that may require their attention.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRRS User Interface (UI) Location Management

To **Create** a new location, DRP(s) will click on the **Create** button under their Locations View.

DRP VIEW

> DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP Defense Active Up

Create Copy Delete Defend Withdraw Edit End Date Register

Locations

Next, enter the location information. The required fields are indicated by the asterisk (*) signs. Fill out all required fields and any optional fields as needed.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP VIEW

> DRP VIEW > Create New Locations

Create New Location

Name*

Address 1*

SAN*

Address 2

Start Date*

City*

End Date*

State*

California

DRP*

Zip*

UDC*

Address Type

LSE*

Device Type

SUBLAP*

PNODE

Cancel

Save

Submit

- Name**

DRP chosen name of the designated location.
- SAN**

Service Account Number unique identifier of the location often assigned by the UDC.
- Start Date**

The Start Date cannot be a prior date or overlap with an existing Active location with same SAN and UDC assignment.
- End Date**

The End Date cannot be a prior date or overlap with an existing Active location with same SAN and UDC assignment.
- DRP**

Designated Demand Response Provider.
- UDC**

Designated Utility Distribution Company
- LSE**

Designated Load Serving Entity
- SubLAP**

The SubLAP in which all the locations within the registration reside SubLAP are determined by the Start/End Dates.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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PNODE The Pnode at which the location load is modeled at. Required field if planning to use the location in a Registration selecting a Custom Resource ID.

Address, City State, Zip, Type

The address of the location and type of location (e.g. commercial, residential) for DRP identification purposes

Device Type

Specifies which device type is installed at the service account location. This field is optional. Please refer to [Appendix E for Business Rules](#) in DRRS by Baseline Method.

Valid inputs are:

- **Null/blank** = Indicates the service account does not have any behind-the-meter device type installed (~~ie i.e.~~ ES, EVSE).
- **Energy Storage (ES)** = Indicates that the location has a behind-the-meter energy storage device installed.
- **Electric Vehicle Supply Equipment (EVSE)** = Indicates that the service account has behind-the-meter EVSE installed.
- **ES and EVSE** combination = Indicates that both ES and EVSE are installed at that location. To select ES and EVSE, use the mouse and click the left mouse button to select ES, hold down the mouse, move the cursor to EVSE and release the mouse.

Options within Create New Location include:

Cancel - cancels the creation of a location.

Save - creates a new location and location ID for it.

Submit - creates a new location and location ID for it and submits it to the UDC/LSE review process. Submits a previously Saved and Edited location to the UDC/LSE review process

Once the new location information has been saved or submitted, a new **Location ID (LOC ID)** will be generated.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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When saved, the location's **Status** will be displayed as **New**.

Start Date	End Date	Status
06/22/2020	12/30/2020	New
06/22/2020	12/30/2020	New

When submitted, the location's **Status** will be displayed as **pending**~~Pending~~.

Start Date	End Date	Status
07/11/2020	07/24/2020	Pending
07/10/2020	07/21/2020	Pending

3.1.1 Edit

New Location

To **Edit** a **New** location, DRP(s) must first select a location with a **Status** of **New** then click on the **Edit** button under their Locations View.

DRP VIEW
Locations

LOC ID
LOC Name
SAN
DRP
[ALL]
UDC
[ALL]
LSE
[ALL]
SUBLAP
[ALL]
Defense Active
[ALL]
Updated Since
DateTime

Create
Copy
Delete
Defend
Withdraw
Edit
End Date
Register

Locations

1
25 of 68
GO

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	De	Ac
☒	11542454 UD_LOC_SAVE_NULL101	SAN_LOC_SAVE_NULL101							06/22/2020	12/30/2020	New		
☐	11542453 UD_LOC_SAVE_EVSE1	SAN_LOC_SAVE_EVSE1					EVSE		06/22/2020	12/30/2020	New		

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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In the **Edit** location view, any changes can be made to the location without it having to be end dated. In this example, the LSEID and start date is changed and the location is updated by selecting the **Update** option.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP VIEW

Edit Location

Edit Location

LOC ID

11542454

SAN*

SAN_LOC_SAVE_NULL101

NAME*

UD_LOC_SAVE_NULL101

Start Date*

06/22/2020

End Date*

12/30/2020

DRP*

UDC*

LSE*

SUBLAP*

PNODE

Address 1*

Work1

Address 2

Work2

City*

Folsom

State*

California

Zip*

98600

Address Type

Work

Status

New

Device Type

ES
EVSE

Cancel

Update

Submit

A message indicates that the **Update** was successful.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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> DRP VIEW > Edit Location

Edit Location

LOC ID
 11542454

SAN*
 SAN_LOC_SAVE_NULL101

NAME*
 UD_LOC_SAVE_NULL101

Start Date*
 07/02/2020

End Date*
 12/30/2020

DRP*
 [dropdown]

UDC*
 [dropdown]

LSE*
 [dropdown]

SUBLAP*
 SLAP_SCEC

PNODE
 [dropdown]

Address 1*
 Work1

Address 2
 Work2

City*
 Folsom

State*
 California

Zip*
 98600

Address Type
 Work

Status
 New

Device Type
 ES
EVSE

Cancel

Update

Submit

07/02/2020 14:58:24 Location (UD_LOC_SAVE_NULL101) with SAN SAN_LOC_SAVE_NULL101 was UPDATED successfully.

The Update is reflected for that Location without a Loc ID change. This type of modification is not available once a location has been submitted for review.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP Defense Active Updated Since DateTime

Create Copy Delete Defend Withdraw Edit End Date Register

Locations

Select Loc ID Name SAN DRP UDC LSE SUBLAP Device Type PNODE Start Date End Date Status Defense Active?

11542454	D_LOC_SAVE_NULL101	SAN_LOC_SAVE_NULL101								07/02/2020	12/30/2020	New	
----------	--------------------	----------------------	--	--	--	--	--	--	--	------------	------------	-----	--

Refer to [Appendix B](#) for Editable fields by Location status.

Pending Location

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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A **Pending** Location has successfully completed the submittal validation and is in the LSE and UDC review. A location in the **Pending** status cannot be edited and, if an attempt is made to Edit a Pending location, an error message will be received. The **Pending** location only allows for end dating of the location. The DRP must select the End Date and confirm that the selected location is to be End Dated.

> DRP VIEW > Confirm End Date Locations

Locations To Be End Dated

1 - 1 of 1

GO

Rows 25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Location Status
		07072020	C			3			07/09/2020	08/01/2022	Pending

Are you sure you want to End Date above Locations?

CancelContinue

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Active Location

An **Active** Location is part of a registration that is in Pending or Confirmed status. Editing **ef-Active** locations is limited to the location **N**ame and **a**Address fields. All other fields (in gray) will be unavailable for modification **and-or** update.

> DRP VIEW > Edit Location

Edit Location

LOC ID
 11535993000149

SAN*
 SAN_TEST_12_CTRLGP149

NAME*
 LOC_TEST_12_CTRLGP149

Start Date*
 05/20/2020

End Date*
 12/30/2021

DRP*

UDC*

LSE*

SUBLAP*

PNODE

Address 1*
 250 Crop Circle Way

Address 2
 Suite 15G

City*
 Folsom

State*
 California

Zip*
 95687

Address Type
 Business

Status
 Active

Device Type

Cancel
 Update

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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If editing the Location end date that is currently in an “Active” status, the corresponding Registration, and the rest of the Location(s) that are also part of that Registration may be affected. Editing the end date of a Location currently in an “Active” status may affect the corresponding Registration and any other Location(s) that are also a part of that Registration. – The Location end date can only be contracted until the end date of the registration. System will allow the user to edit a Location within the Registration start and end date if the Registration start date is in the future. If the Location that ~~are is~~ being ended is part of a Registration that contains more than one (1) Locations, the rest of the Locations will no longer be linked to that Registration once the Registration ~~expired~~ expires, and the Locations’ status will ~~be changed~~ from “Active” to “Inactive”.

Example 1.

- User ~~Eend-D-dates~~ a location with an “Active” status.
- Location ~~Endend_-Dd~~ate is in the future and within the Registration period.

REG ID#249719, Resource ID = RESA.

1. On 10/28/2019: USER1 created REG ID#249719, Resource ID = RESA for 11/15/2019 through 11/30/2021. REG ID#249719 contains more than 1 locations.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Create Edit Copy Terminate Delete

Registrations

Select Reg ID	Name	DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource ID	Resource Type	Program	Baseline Method	Start Date	End Date	Status
249719	REG6-PSOK								Pre Defined	Proxy DR	Day Matching 10/10	11/15/2019	11/30/2021	Confirmed

Locations

Loc ID	SAN	Resource ID	Start date	End date	Distribution Factor	Control Group?	Treatment Group?
249716	LOC16-test		11/15/2019	12/31/2029			View Location
249718	LOC18-test		11/01/2019	12/31/2029			View Location

2. On 10/29/2019: USER1 "Edit" the Location ID #249716 ~~End-end~~ date from 12/31/2029 to 11/28/2019; which caused the Registration ~~End-end~~ date to change.

The system updates the Registration ~~End-end Date-date~~ from 11/30/2021 to 11/28/2019, status is still in "Confirmed".

Create Edit Copy Terminate Delete

Registrations

Select Reg ID	Name	DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource ID	Resource Type	Program	Baseline Method	Start Date	End Date	Status
249719	REG6-PSOK								Pre Defined	Proxy DR	Day Matching 10/10	11/15/2019	11/28/2019	Confirmed

Locations

Loc ID	SAN	Resource ID	Start date	End date	Distribution Factor	Control Group?	Treatment Group?
249716	LOC16-test		11/15/2019	11/28/2019			View Location
249718	LOC18-test		11/01/2019	12/31/2029			View Location

3. On 11/29/2019, after the Registration ~~expiredexpires~~, Registration status will change from "Confirmed" to "Terminated", Location ID #249716 status will change from "Active" to "End Dated", and Location ID #249718 status will change from "Active" to "Inactive".

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Example 2.

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- User End-Dates a location with an "Active" status.
 - User end-dating a location with an "Active" status.
 - Location ~~Endend~~ -Ddate is in the future and earlier than the Registration period.
- User created REG ID#249719. Resource ID = RESA, registration is for 11/15/2019 through 11/30/2021.
 - The user "Edit"end the LOCATION_ID = 123 end date to 11/14/2019. sSince the location end date is earlier than the corresponding Registration, this will cause the Registration (effective (in the future)-) willto be deleted.

LOCATION_ID	SAN	SUBLAP	START_DATE	END_DATE	UPDATED_BY	UPDT_DT_TM	Notes
123	SAN1	SLAP_PGSI	11/17/2017	12/30/2029		8/23/2019 10:29 AM	Original record.
123	SAN1	SLAP_PGSI	11/17/2017	11/14/2019	User1	11/14/2019 11:19 AM	User "User1" made a location record to the end-date from 12/30/2029 to 11/14/2019 ; which caused the Registration (effective (in the future) 11/15/2019 to be deleted.

REGISTRATION_ID	SUBLAP	RESOURCE_ID	START_DATE	END_DATE	UPDT_DT_TM	Notes
249719	SLAP_PGSI	RESA	11/15/2019	12/31/2019	11/14/2019 11:19 AM	System deleted this Registration per Location end-date update above

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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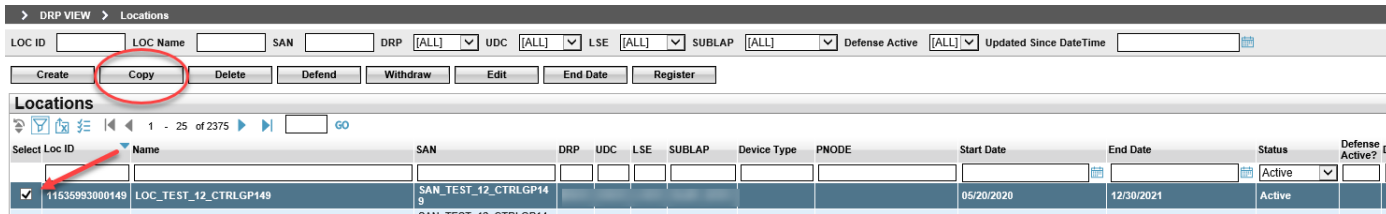
For Location that is under a defense process, user must not alter the registration record outside of the defense process. If so, undesirable results will occur such as overlapping registration records. Please see sections [3.1.5](#), and [Appendix A](#) for more information on how to handle the different cases.

End Dated Location

No changes are permitted for an End-Dated Location. Submissions to Edit an End-Dated Location will be rejected. End-dated locations are logically equivalent to deleted records.

3.1.2 Copy

The **Copy** feature allows the DRP to create a new location by copying an existing location and making changes to the copied field information. Locations in any status may be copied. To **Copy** a location, the location is first selected then the **Copy** button chosen under the Locations View.



Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defense Active?
☒	LOC_TEST_12_CTRLGP149	SAN_TEST_12_CTRLGP149							05/20/2020	12/30/2021	Active	

The Copy option takes the user to the Create New Locations window and provides the same Options:

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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- Cancel** - Cancels the creation of a new location.
- Save** - Creates a new location with changes and location ID for it.
- Submit** - Creates a new location with changes and location ID for it and submits it to the LSE and UDC review process.

>
 [DRP VIEW](#)
 >
 [Create New Locations](#)

Create New Location

Name*

LOC_TEST_12_CTRLGP149

SAN*

SAN_TEST_12_CTRLGP149

Start Date*

05/20/2020

End Date*

12/30/2021

DRP*

UDC*

LSE*

SUBLAP*

PNODE

Address 1

250 Crop Circle Way

Address 2

Suite 15G

City*

Folsom

State*

California

Zip*

95687

Address Type

Business

Device Type

Cancel

Save

Submit

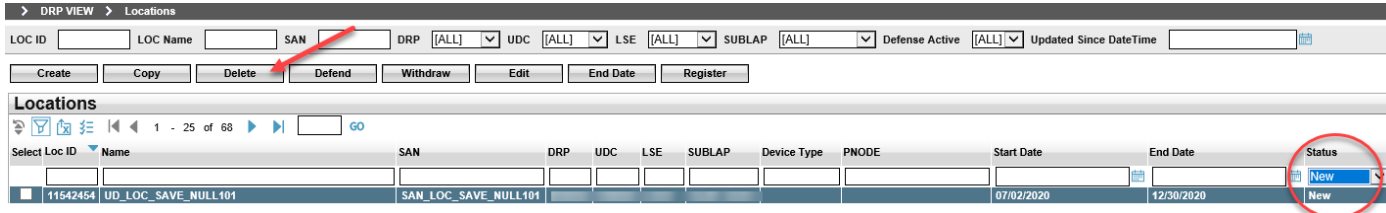
58
 COPYRIGHT © 2025 by California ISO. All Rights Reserved. Copyright © 2018 CALIFORNIA INDEPENDENT SYSTEM OPERATOR. All rights reserved.
 Information in this document is subject to change.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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3.1.3 Delete

The **Delete** feature allows the DRP to delete a ~~new~~-New location. Locations can only be deleted when they are in the New status. To **Delete** a location, the ~~new~~-New location is first selected then the **Delete** button chosen under the Locations View.



DRP VIEW > Locations

LOC ID: [] LOC Name: [] SAN: [] DRP: [ALL] UDC: [ALL] LSE: [ALL] SUBLAP: [ALL] Defense Active: [ALL] Updated Since DateTime: []

Create Copy **Delete** Defend Withdraw Edit End Date Register

Locations

Select Loc ID: [] Name: [] SAN: [] DRP: [] UDC: [] LSE: [] SUBLAP: [] Device Type: [] PNODE: [] Start Date: [] End Date: [] Status: [New]

11542454	UD_LOC_SAVE_NULL101	SAN_LOC_SAVE_NULL101							07/02/2020	12/30/2020	New
----------	---------------------	----------------------	--	--	--	--	--	--	------------	------------	-----

Once **Delete** is selected, the Location to be deleted will be identified and a confirmation to delete is required by selecting the **Continue** button.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP VIEW

Confirm Delete Locations

Locations To Be Deleted

1 - 1 of 1

GO

Rows25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Location Status
44542454	UD_LOC_SAVE_NULL101	SAN_LOC_SAVE_NULL101	DAPX	UPGE	LPGE	SLAP_PGCC			07/02/2020	12/30/2020	New

Are you sure you want to Delete above Locations?

Cancel

Continue

A deleted Location and its created Location ID will no longer exist in the Locations View.

3.1.4 Duplication Check

When a location is submitted for review, a duplication check is performed against other locations in the system. If the DRPID is the same as the submitting DRP, the system will reject the location and provide an error message. If the DRPID is different, the location will be created with a Duplicate status.

~~Note: Location cannot be submitted and cannot enter the defend process until the duplicate location is in the active or inactive status.~~

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP VIEW
Defend Location

Initiate Defend

LOC ID

Name*

LOC_TEST_12_CTRLGP149-Duplic

SAN*

SAN_TEST_12_CTRLGP149

Start Date*

07/02/2020

End Date*

01/01/2022

DRP*

UDC*

LSE*

SUBLAP*

PNODE

Address 1

250 Crop Circle Way

Address 2

Suite 15G

City

Folsom

State*

California

Zip*

95687

Address Type

Business

Device Type

ES

EVSE

Requester Name*

Phone* (Format: xxx-xxx-xxxx)

Comments*

07/02/2020 16:02:04 There is Duplicate location with given SAN and UDC

Note: Location cannot be submitted and cannot enter the Defend process until the existing location is in the Active or Inactive status – if a duplicate is submitted while the existing location is under review, the following error will arise:

There is a Duplicate location with the given SAN and UDC that is pending review. Please try to create the location after the review period to initiate the defend process

3.1.5 Defend

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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The **Defend** feature allows the DRP to defend a location that has been found to be a duplicate of ~~another~~ ~~or~~ location in the ~~inactive~~ or ~~a~~Active status ~~having-with~~ the same SAN, UDC and ~~having~~ overlapping effective dates with another DRP (Incumbent).

The location will be identified as a duplicate once it is submitted for approval.

The system may also send a courtesy notification to the Incumbent DRP that their location needs to be defended for use by request of another DRP.

Example of email notification sent to the Incumbent DRP to defend location ownership.



The following location(s) has triggered the location defend process

Updates for Locations							
Location Id	Location Name	DRP	UDC	LSE	Effective Start Dt	Effective End Dt	Status

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Prospective DRP action:

The ~~prospective~~Prospective DRP must include a contact name, number and comment if they chose to enter the ~~defend~~Defend process by selecting the **Continue** button. Locations submitted into the ~~D~~efendse process will be set to a Duplicate status.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP VIEW

DRP VIEW Defend Location

Location ID null Apply Reset

Initiate Defend

LOC ID

Name*

SAN*

Start Date*

End Date*

DRP

UDC

LSE

SUBLAP

PNODE

Address 1

Address 2

City

State*

Zip*

Address Type

Requester Name*

Phone* (Format: xxx-xxx-xxxx)

Comments*

A Location with given SAN and UDC combination already exists, do you want to continue and initiate the Defend Process?

Cancel Continue

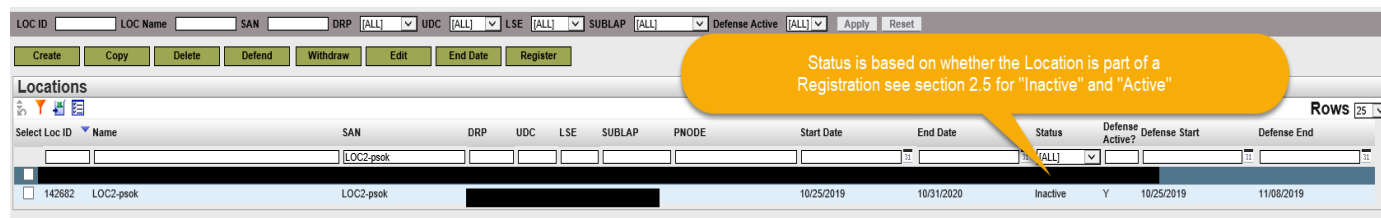
Incumbent DRP action:

The ~~incumbent~~ Incumbent DRP must accept or reject the ~~prospective's~~ Prospective's location claim request via the Defend process on the UI.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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To view the location record under defense, the incumbent DRP can log into the Locations screen. The Location(s) that is under defense will show a status of Defense Active = 'Y', and the Defense Start, and Defense End will be filled in with the relevant dates. See the figure below:-



The status of Defense Active = 'Y', and the Defense Start, and Defense End will disappear after the ~~incumbent~~-Incumbent DRP respond to the prospective DRP, or if the Defense End date is passed.-

While the ~~Defend~~ process ~~in~~-is in progress, the ~~in~~Incumbent DRP must accept/reject through the ~~defend~~-Defend process. Do not alter the registration and location outside of the ~~defend~~-Defend process; doing so will result in overlapping records. To defend, ~~in~~Incumbent DRP must select the Location, click **Defend**, provide comment on their defense of the location, contact name, and phone number.

- If "**Valid Location**" is checked, the incumbent DRP is indicating that the location is valid and will not release that location based on comments received from prospective DRP.
- If the "**Valid Location**" is not checked, the incumbent DRP is stating that the request received is accepted and action will be taken by them to release the location to the prospective DRP.

Do not check if Incumbent DRP agree to release the location.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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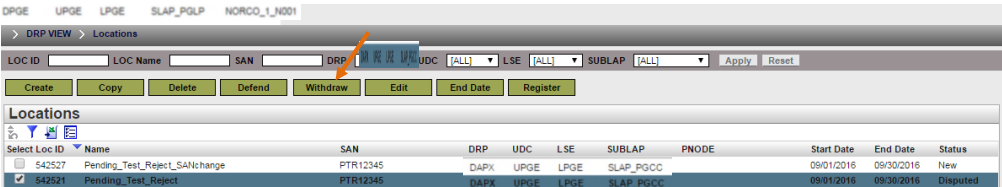
If the ~~Incumbent~~ Incumbent ~~DRP~~ DRP takes no action within 10 business days, the system will automatically accept the Defend process and will end Date the location and its corresponding registration ~~after the 10 business days~~. In addition, the system will automatically adjust the end date out by 5 business days for the location that is in defense process and its corresponding registration unless the registration is ending sooner than the new end date, in which case it will remain unchanged. Note that the status for the locations that are under the defend process will remain “Active” until the registration expired, and the rest of the locations will be in “Inactive” status.

A list of the possible Cases of the Defend Process is in [Appendix A](#) in this document.

If the ~~Incumbent~~ Incumbent ~~DRP~~ DRP defends the location during the defense period, the ~~prospective~~ Prospective ~~DRP~~ DRP must contact them to resolve the duplicate use conflict outside of the ISO registration process.

3.1.6 Withdraw

The **Withdraw** feature allows the **DRP** to withdraw a location from the validation and UDC or LSE review processes. Locations can only be withdrawn when they are in “Pending”, “Duplicate” or “Disputed” statuses. To **Withdraw** a location, the location is first selected then the **Withdraw** button chosen under the Locations View.



 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Once **Withdraw** is selected, the Location to be withdrawn will be identified and a confirmation to withdraw is required by selecting the **Continue** button.

DRP VIEW | UDC VIEW | LSE VIEW | ADMINISTRATION

DRP VIEW Confirm Withdraw Locations

Locations To Be Withdrawn

1 - 1 of 1

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE	Start Date	End Date	Location Status
542714	Test_duplicate_SAN	PTR12345	DAPX	UPGE	LPGE	SLAP_PGCC		8/8/2016	10/10/2016	Duplicate

Are you sure you want to Withdraw above Locations?

Cancel

Continue

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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3.1.7 End Date

The **End Date** feature allows the DRP to end ~~date~~a location with its earliest available end date.—Locations can only be end dated when they are in the “Inactive”, “Active”, “Duplicate”, or “Disputed” statuses. The end date selected by the system is dependent on the status of the location. To **End Date** a location, the location is first selected then the **End Date** button is chosen-selected under the Locations View.

DRP VIEW | UDC VIEW | LSE VIEW | ADMINISTRATION

DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP

Locations

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE	Start Date	End Date	Status
☐	542527 Pending_Test_Reject_SANchange	PTR12345	DAPX	UPGE	LPGE	SLAP_PGCC		09/01/2016	09/30/2016	New
☒	542521 Pending_Test_Reject	PTR12345	DAPX	UPGE	LPGE	SLAP_PGCC		09/01/2016	09/30/2016	Disputed

DRP VIEW | UDC VIEW | LSE VIEW | ADMINISTRATION

DRP VIEW > Locations

LOC ID LOC Name SAN DRP UDC LSE SUBLAP

Locations

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PN
☐								

Once **End Date** is selected, the Location to be end dated will be identified and a confirmation to end date is required by selecting the **Continue** button. If that Location is in Active State, a list of its Registrations will also be provided with a

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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notice stating: “Note: End Dating the above location will affect the listed registrations. Future Registrations will be deleted from the system.”

Locations To Be End Dated

1 - 1 of 1

GO

Rows 25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Location Status
	Location_Test_C				DAPX	UPGE	LPGE	SLAP_PGCC			

Registrations

Rows 25

Reg ID	Reg Name	Start Date	End Date	Status
	Registration_Test_1	09/17/2025	02/06/2026	Confirmed

View Registration

Are you sure you want to End Date above Locations?

Cancel

Continue

Note: End Dating the above location will affect the listed registrations. Future Registrations will be deleted from the system.

DRP VIEW Confirm End Date Locations

Locations To Be End Dated

1 - 1 of 1

GO

Rows 25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE	Start Date	End Date	Location Status
542527	Test_duplicate_SAN	PTR12345	DAPX	UPGE	LPGE	SLAP_PGCC		09/01/2016	09/30/2016	Inactive

Are you sure you want to End Date above Locations?

Cancel

Continue

3.2 Location Review

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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3.2.1 LSE Review

After logging into ~~the~~DRRS, the LSE is ~~provided~~provided with a view option for Locations and Registrations. Selecting the Location view will provide a list of locations that they have been assigned as the LSE. The Location view includes all the locational information provided by the DRP to create the location. ¹ In addition, the following ~~is~~are provided in this view:

Location ID	A unique ID assigned by the DRRS for all new locations when they are saved or submitted.
Status	The Current status of the location.
Review Start	The date on which the location was submitted for review. This date <u>marks the</u> beginning of the five <u>(5)</u> business day (5) -review period for the LSE to review and respond before the DRRS auto approves the location.
Review End	The date on which the review period ends <u>s</u> or date on which the review was completed.
LSE Review	A “Y” indicates that a valid location <u>-</u> review has been completed.
Reviewer Name	The name of the reviewer provided as part of validation
Reviewer Contact	Phone number of the reviewer provided as part of validation.

Locations requiring review will be in the **Pending** status.

Locations reviewed without findings will be in the **Active** or **Inactive** status.

Locations reviewed with findings from either the LSE or UDC will be in the **Disputed** status

The LSE selects the Locations (one or multiple) to be reviewed and ~~chooses~~clicks the **Review** button to enter the review confirmation process screen.

Note: -The system ~~only accepts~~allows up to 25 Locations/rows at a time when approving.

¹ See Location Management > Create section for all location information provided by the DRP.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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> LSE VIEW > Locations

LOC ID: LOC Name: SAN: DRP: [ALL] UDC: [ALL] LSE: [ALL] SUBLAP: [ALL] Updated Since DateTime: Apply Reset

Review

Locations

Select	Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	DEVICE TYPE	PNODE	Start Date	End Date	Review Start	Review End	Status
☒	11544237	CIDI 213762 Case 2 - Prospective	GK_SAN_07012002							07/11/2020	07/24/2020	07/01/2020	07/06/2020	Pending
☐	11544081	GK Loc for CIDI 213762 Case 1 - Prospective	GK_SAN_07012001							07/10/2020	07/21/2020	07/01/2020	07/06/2020	Pending
☐	11544016	LOC_TEST_to defend	SAN_TEST_ST12_CTRLGP1							07/09/2020	12/31/2021	07/01/2020	07/06/2020	Pending

When selecting more than one location, all locations listed are reviewed by the LSE together. Response by the LSE will affect all locations listed, selection of individual locations is not available in the "locations to be reviewed" view.

> LSE VIEW > Confirm Review Locations

Locations To Be Reviewed

1 - 3 of 3 GO Rows 25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	DEVICE TYPE	PNODE	Start Date	End Date	Location Status
11544237	CIDI 213762 Case 2 - Prospective	GK_SAN_07012002							07/11/2020	07/24/2020	Pending
11544081	GK Loc for CIDI 213762 Case 1 - Prospective	GK_SAN_07012001							07/10/2020	07/21/2020	Pending
11544016	LOC_TEST_to defend	SAN_TEST_ST12_CTRLGP1							07/09/2020	12/31/2021	Pending

Valid Location ☒ Check the box to approve

Reviewer Name* Reviewer Name and Phone number is required

Phone* (Format: xxx-xxx-xxxx) Reviewer Name and Phone number is required

Review Comment

Are you sure you want to Submit the Review for above Locations?

Cancel Continue Hit "Continue" to submit

The location(s) is confirmed as being valid by **selecting** the **Valid Location** box. The location confirmation is disputed by leaving the box un-selected indicating that the location(s) have has not passed the review.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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The LSE must include a Reviewer Name and Phone # and, if the location is not valid, a Review Comment when choosing to **Continue**. Comment should include the reason as to why the LSE has determined this to be an invalid location.

Examples include, but are not limited to the following:

- Incorrect location information (e.g. incorrect SubLAP)
- Wrong LSE or UDC designation
- No commercial agreement
- Regulatory non-conformance
- Location identified as participating in another program
- Location device type

Note: The **Comments** box is limited to **255** characters.

The LSE may end their validation of the location(s) by choosing to **Cancel**.

3.2.2 UDC Review

After logging into ~~the~~ DRRS, the UDC is ~~provided~~provided with a view option for Locations and Registrations.

Selecting the Location view will provide a list of locations that they have been assigned as the UDC. The Location view includes all the locational information provided by the DRP to create the location. ² In addition, the following ~~is~~are provided in this view:

Location ID	A unique ID assigned by the DRRS for all new locations when they are saved or submitted.
Status	The Current status of the location.

² See Location Management > Create section for all location information provided by the DRP.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Review Start The date on which the location was submitted for review. This date marks the beginning of the five (5)-business day ~~(5)~~-review period for the UDC to review and respond before the DRRS auto approves the location.

Review End The date on which the review period ends or date on which the review was completed.

LSE Review A “Y” indicates that a valid location review has been completed.

Reviewer Name The name of the reviewer provided as part of validation.

Reviewer Contact Phone number of the reviewer provided as part of validation.

Locations requiring review will be in the **Pending** status.

Locations reviewed without findings will be in the **Active** or **Inactive** status.

Locations reviewed with findings from either the LSE or UDC will be in the **Disputed** status

The UDC selects the Locations (one or multiple) to be reviewed and ~~chooses~~ clicks the **Review** button to enter the review confirmation process screen.

Note: -The system only accepts 25 Locations/rows at a time when approving.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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UDC VIEW > Locations

LOC ID: LOC Name: SAN: DRP: [ALL] UDC: [ALL] LSE: [ALL] SUBLAP: [ALL] Updated Since DateTime:

Locations

Select Loc ID: Select the location(s)

	SAN	DRP	UDC	LSE	SUBLAP	DEVICE TYPE	PNODE	Start Date	End Date	Review Start	Review End	Status
☒	11544237 CIDI 213762 Case 2 - Prospective	GK_SAN_07012002						07/11/2020	07/24/2020	07/01/2020	07/06/2020	Pending
☐	11544081 GK Loc for CIDI 213762 Case 1 - Prospective	GK_SAN_07012001						07/10/2020	07/21/2020	07/01/2020	07/06/2020	Pending

SAN TEST ST12 CTRLGP

When selecting more than one location, all locations listed are reviewed by the UDC together. Response by the UDC will affect all locations listed, selection of individual locations is not available in the “locations to be reviewed” view.

UDC VIEW > Confirm Review Locations

Locations To Be Reviewed

Rows: 25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	DEVICE TYPE	PNODE	Start Date	End Date	Location Status
11544237	CIDI 213762 Case 2 - Prospective	GK_SAN_07012002							07/11/2020	07/24/2020	Pending
11544081	GK Loc for CIDI 213762 Case 1 - Prospective	GK_SAN_07012001							07/10/2020	07/21/2020	Pending

☐ Valid Location

Reviewer Name*

Phone* (Format: xxx-xxx-xxxx)

Review Comment

Are you sure you want to Submit the Review for above Locations?

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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The location(s) is confirmed as being valid by **selecting** the **Valid Location** box. The location confirmation is disputed by leaving the box un-selected indicating that the location(s) ~~have~~has not passed the review.

The UDC must include a Reviewer Name and Phone # and, if the location is not valid, a Review Comment when choosing to **Continue**. Comment should include the reason as to why the UDC has determined this to be an invalid location. Examples include, but are not limited to the following:

- Incorrect location information (e.g. incorrect SubLAP)
- Wrong LSE or UDC designation
- No commercial agreement
- Regulatory non-conformance
- Location identified as participating in another program
- Location device type

Note: The **Comments** box is limited to **255** characters.

The UDC may end their validation of the location(s) by choosing to **Cancel**

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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3.2.3 Invalid Review Disputed Location

A **Disputed** Location was unsuccessful in obtaining a valid review by one of the reviewing entities (LSE/UDC). The DRP must now determine from ~~the provided comments~~comments provided why they were unable to pass validation of the location submitted for review. When a location has not passed the LSE/UDC review, it will be set to the status of **Disputed** and ~~the~~reviewer contact information and comments can be viewed by the DRP in their Locations view when the location is highlighted.

DRP VIEW > Locations

LOC ID
LOC Name
SAN
DRP
[ALL]
UDC
[ALL]
LSE
[ALL]
SUBLAP
[ALL]
Defense Active
[ALL]
Updated Since DateTime

Create
Copy
Delete
Defend
Withdraw
Edit
End Date
Register

Locations
1 - 25 of 1222
GO

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defense Active?	Defense Sta
									01/27/2019	01/27/2029	Duplicate		
									01/27/2019	01/27/2029	Duplicate		
									01/25/2019	01/25/2029	Duplicate		
									01/25/2019	01/25/2029	Duplicate		

Location Address

Address 1

UDC/LSE Reviewer Contact and Comments

CityStateZipType

MONTCLAIRCAS91763-1630Test address

Location Review Details

LSE Approved	LSE Comments	LSE Reviewer	LSE Contact Info	UDC Approved	UDC Comments	UDC Reviewer	UDC Contact Info
--------------	--------------	--------------	------------------	--------------	--------------	--------------	------------------

Location Defend Details - Incumbent

Incumbent Name	Incumbent Contact Info	Incumbent Comments	Prospective Name	Prospective Contact Info	Prospective Comments
		Customer turned off service on 12/5/2018			

Location Defend Details - Prospective

Incumbent Name	Incumbent Contact Info	Incumbent Comments	Prospective Name	Prospective Contact Info	Prospective Comments
----------------	------------------------	--------------------	------------------	--------------------------	----------------------

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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To correct errors identified, the DRP must create a new location. The **Disputed** Location is not editable but may be copied and updated with the corrected information. When saved or submitted, a new location with **a** new Location ID will be created. The new location created must then be submitted for review and will be in **Pending** status until the review is complete.

DRP VIEW > Locations

LOC ID
LOC Name
SAN
DRP [ALL]
UDC [ALL]
LSE [ALL]
SUBLAP [ALL]
Defense Active [ALL]
Updated Since DateTime
Apply
Reset

Create
Copy
Delete
Defend
Withdraw
Edit
End Date
Register

Locations
1 - 25 of 1222
GO

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defense Active?	Defense Start	Defense End
☒									01/27/2019	01/27/2029	Duplicate			
☐									01/27/2019	01/27/2029	Duplicate			
☐									01/25/2019	01/25/2029	Duplicate			

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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> DRP VIEW > Create New Locations

Create New Location

Copy and Correct Disputed Location

Name*

Address 1

SAN*

Address 2

Start Date* 01/27/2019

City* MONTCLAIR

End Date* 01/27/2029

State* California

DRP*

Zip* 91763-1630

UDC*

Address Type Test address

LSE*

Device Type

SUBLAP*

PNODE

Cancel

Save

Submit

If the DRP believes the location is valid with information provided and does not agree with the LSE or UDC findings, they must work with the entity that provided the comments to resolve the reason it was not found to be a valid location. The process for resolving the disputed location issues is managed outside of the ISO. The DRP is provided with the necessary information through the review process, needed to make direct contact with the LSE or UDC to initiate resolution.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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3.2.4 LSE/UDC Review notification

Example of email notification to the LSE and UDC when a location has been submitted for review.



Mon 7/6/2020 8:22 AM

no-reply@caiso.com

Locations Submitted for Review - Production

To ☐

Cc ☐ PDR

UDC or LSE
Primary
Contact

Notification

Updates for Locations

Location Id	Location Name	DRP	UDC	LSE	Effective Start Dt	Effective End Dt	Status
					2020-07-06	2029-12-31	PENDING
					2020-07-06	2029-12-31	PENDING
					2020-07-06	2029-12-31	PENDING

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 <u>10/13/2025</u>
DEMAND RESPONSE REGISTRATION USER GUIDE			

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3.2.5 Application Programming Interface (API) Location Management

The DRRS provides APIs for the performance of all location management processing.

Market Participants can perform the following using the DRRS web services:

- Retrieve DRRS Locations
- Save request for creating draft/new DRRS Locations
- Delete request for deleting the draft/new DRRS Locations
- Submit request for creating/end-dating DRRS Locations
- Review request for reviewing DRRS Locations (for LSE/UDC/LSE&UDC review)
- Modify request for modifying DRRS Locations
- Initiate Defend request for defending for a DRRS Location
- Review Defend request for reviewing the DRRS Location that is under defend process (for DRP review)
- Retrieve status for the creation or modification requests
- Retrieve locations attributes that is currently displayed on the UI.
- Retrieve locations that are currently involved in a defense process. This is equivalent to the existing function on the UI to retrieve locations with "Defense Active" = 'Y'

Technical ISO Interface Specifications with more detailed information are available on the ISO Developer website at

<https://developer.caiso.com>.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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3.3 Creating a Registration

After the LSE and UDC have reviewed and approved the Location(s), the DRP can then create a registration. The **Register** feature allows the DRP to register a location or multiple locations. Locations can only be registered when they are in either the inactive, and or a Active statuses. Registration can be in multiple LSEs, but LSEs but must be within the same SubLAP.

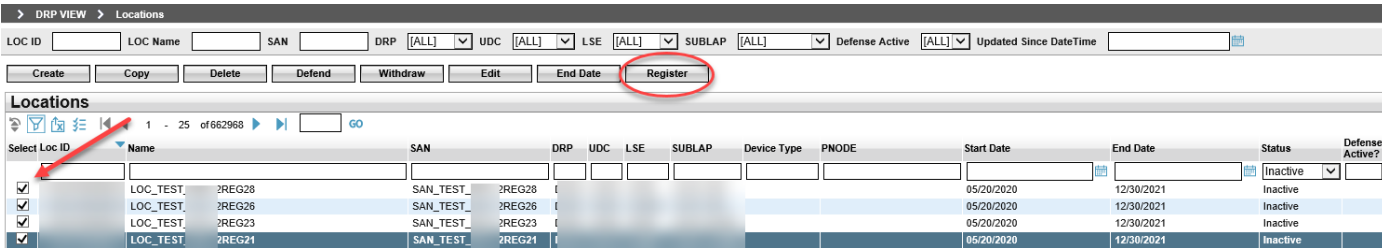
There are 2 approaches to register a location or multiple locations.

- **Approach 1:**
 - Under the **DRP View > Locations**
 - Select the required-desired location(s)
 - Locations belonging to the same or various LSEs are permitted, but with the same DRP, UDC, and SUBLAP for the registration. The “Device Type” will determine corresponding baseline methodologies available for registrations inclusive of these devices, please refer to [Appendix E-DRRS Location Type – Baseline Method Reference Matrix](#).
 - Click on the **Register** button

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Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defense Active?
☒	LOC_TEST_2REG28	SAN_TEST_2REG28							05/20/2020	12/30/2021	Inactive	☐
☒	LOC_TEST_2REG26	SAN_TEST_2REG26							05/20/2020	12/30/2021	Inactive	☐
☒	LOC_TEST_2REG23	SAN_TEST_2REG23							05/20/2020	12/30/2021	Inactive	☐
☒	LOC_TEST_2REG21	SAN_TEST_2REG21							05/20/2020	12/30/2021	Inactive	☐

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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- On the **Registration** screen, input the data and click either ~~S~~save/ or ~~S~~submit.
 - Save will create a draft Registration in New Status
 - Submit will create a Registration in Confirmed or Pending Status, depending on validation requirements

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▲ The following is a description of the fields requested for input to **create** a Registration:

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- **Name** DRP chosen name of the Registration. May contain alphanumeric and special characters, up to a max of 255
- **Start Date**³ The Effective Start Date of the Registration. The Start Date cannot be a prior date. Note: The Start Date cannot overlap with the effective dates of another Confirmed Registration for the same resource ID or linked to the same location. Only Locations with start dates before and end dates after will be generated as Available Locations for selection
- **End Date** The Effective End Date of the Registration. The End Date cannot be a prior date, a date before the Start Date, or overlap with an existing Active location Confirmed Registration with same SAN and UDC assignment. The End Date can be no less than 6 Business Days from the request processing date. Note: End Date cannot be the same as the Start Date if the Start Date is within 5 Business Days from the request processing date.
- **DRP**⁴ Demand Response Provider ID
- **UDC** Utility Distribution Company ID

³ The system validates effective dates input for the Registration against Location effective dates to determine available Locations that can be registered.

⁴ The system uses DRP, UDC, LSE and SubLAP information provided to ensure Locations presented as available have the same designations.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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- **Baseline Method** The Baseline Method that will be used to determine the performance of the Resource. This requires approval by the CAISO. Only the approved Performance Evaluation Method (baseline) will be available from the drop-down list. Please see Section 5 of the Business Practice Manual (BPM) for Demand Response for instruction on how to submit a Performance Evaluation Methodology request section 5, and Appendix E – DRRS Location Device Type Business Rules and Baseline Method Reference Matrix.
- **SubLAP** The SubLAP in which all the locations within the registration reside
- **DRP SCID** The ID of the acting Scheduling Coordinator for the Registrations market Resource.
- **Program** Proxy DR or Reliability DR
- **Resource Type** Predefined or Custom.
 - Available Locations will be filtered based on the Resource Type selection. When selecting Custom, only Locations with PNODE information can be selected for the Registration.
 - **Custom Resource ID**
 - If the DRP believes that the pre-defined Resource ID is not sufficient for its needs, the DRP selects or requests a custom Resource ID be assigned when the Registration is created. The information provided in the DRRS during the Registrations creation, including PNodes and their applicable Distribution Factors, is-is used to develop the Custom Resource ID.
 - For ~~an~~ example (applicable for a PDR or RDRR): -A DRP requests a custom Resource ID for 4 end use Loads that have the same LSE and are located in the same Sub-LAP. Based on historic Load of these 4 end use customers, 80% of the Load is connected to Bus 1 and 20% of the Load is connected to Bus 2.

Here is how it will look:

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Customer	LSE	Sub-LAP	Location	Registration	GDF	Custom DR Resource ID
1	A	PGF1	Bus 1	Reg 01	0.8	PRMNTE_6_PDRC01
2	A	PGF1	Bus 1	Reg 01		PRMNTE_6_PDRC01
3	A	PGF1	Bus 2	Reg 01	0.2	PRMNTE_6_PDRC01
4	A	PGF1	Bus 2	Reg 01		PRMNTE_6_PDRC01

o Requesting a Custom Resource ID with Dynamic GDF

- If approved by the CAISO, a DRP may submit GDFs as part of its Bid for a given PDR or RDRR. In order to be eligible to submit GDFs as part of a Bid, the DRP must request and receive approval from the CAISO to dynamically Bid GDFs. To request a custom GDF, please contact the PDR coordinator at pdrc@caiso.com with the following information: Location of bus, and total MW. The custom GDF can be deployed based on the Master File deployment.

o Resource (Resource ID)

- o When Resource Type = Pre Defined or Custom
 - o The drop-down list will show available resources that can be selected based on the Registration information provided, including Resource IDs previously assigned to the DRP and unassigned Pre Defined resource IDs for the identified SubLAP.

The Resource ID naming convention has the letter “C” after the letter “PDR” and Pre defined has the letter “P” after the letter “PDR” for Proxy Demand Resource.

Please see Appendix D for business rules and tips.

o Show/Refresh Available Location

- o The selected locations will appear in the **Selected Locations** grid.

Commented [A1]: Add a business rule regarding the Curtailment resource applies to a PDR-LSR baseline registration...

Commented [A2R1]: Please see Appendix D

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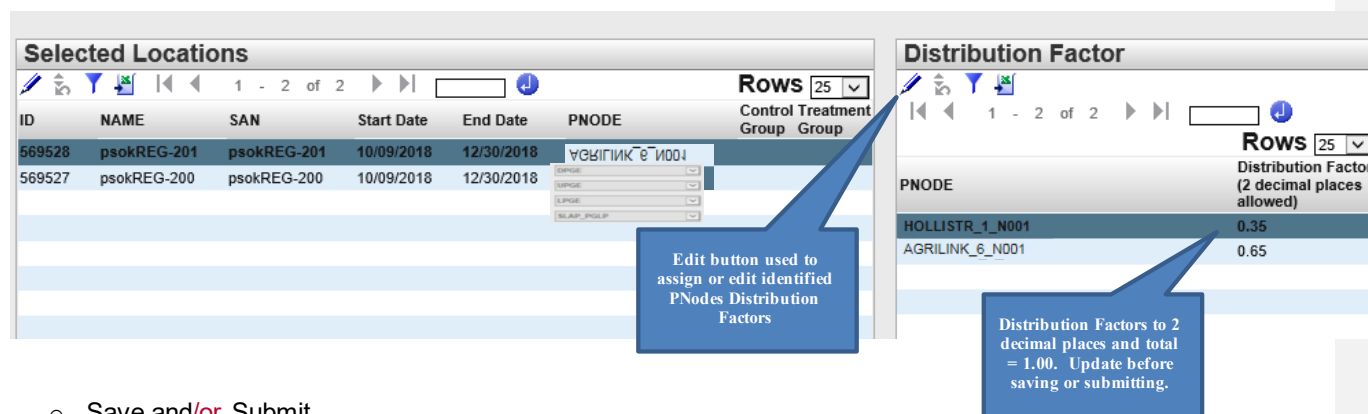
 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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- Only Locations with start dates before the registration's Start Date, and end dates after the registration's End Date, will be generated as Available Locations for selection

Distribution Factors for Custom Resource

If the Resource Type selected is Custom, the system generated list of available Locations, to select from, will only include locations that have been assigned a PNode. When creating this Registration, the DRP must assign distribution factors for PNodes identified. PNodes will be populated in the Distribution Factor window based on the Locations selected to be registered. The Edit button in this window provides the DRP with the opportunity to assign a Distribution Factor to each of the PNodes. The Distribution Factor must indicate the ~~percent~~percentage of load reduction that will be occur at each PNode represented as a two decimal precision level. Distribution Factors across all PNodes provided must total 1.00. The SC shall provide the Pnode and Distribution Factors used to create the custom Resource ID and the Registration in the DRRS to RDT@caiso.com when submitting the GRDT form.



- Save and/or Submit.

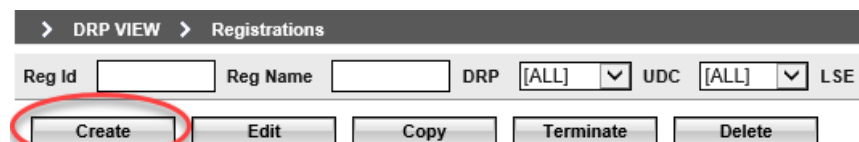
 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Creating Registration using the Control Group baseline method, please see [Appendix F](#).

• **Approach 2:**

- Under the **DRP View**, select **Registrations** then click on the **Create** button.



- Input registration data.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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> DRP VIEW > Registration

Registration

Reg Id

Name*

Start Date*

End Date*

DRP*

UDC*

Baseline Method*

SUBLAP

DRP SCID*

Program*

Resource Type*

Resource*

PMax

Status

Refresh Available Locs

Show/Refresh Available Locations

Locations list based on DRP, UDC, SUBLAP, effective dates, and Baseline method and its associated Location device type

Available Locations

ID	Name	SAN	Start Date	End Date	Device Type	PNODE

Selected Locations

ID	Name	SAN	Start Date	End Date	Device Type	PNODE	Control Group	Treatment Group

The following is a description of the fields requested ~~to~~ for input to **create** a Registration:

- Name** DRP chosen name of the Registration. May contain alphanumeric and special characters, up to a max of 255

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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- **Start Date⁵** The Effective Start Date of the Registration. The Start Date cannot be a prior date. Note: The Start Date cannot overlap with the effective dates of another Confirmed Registration for the same resource ID or linked to the same location. The Start Date cannot be a prior date. Only Locations with start dates before and end dates after will be generated as Available Locations for selection
- **End Date** The Effective End Date of the Registration. The End Date cannot be a prior date, a date before the Start Date, or overlap with an existing Confirmed Registration with same SAN and UDC assignment. The End Date can be no less than 6 Business Days from the request processing date. Note: End Date cannot be the same as the Start Date if the Start Date is within 5 Business Days from the request processing date. The End Date cannot be a prior date or overlap with an existing Active location with same SAN and UDC assignment
- **DRP⁶** Demand Response Provider ID
- **UDC** Utility Distribution Company ID
- **Baseline Method** The Baseline Method that will be used to determine the performance of the Resource. This require approval by CAISO. Only the approved Performance Evaluation or Baseline Method will be available from the drop-down list. Please see Section 5 of the Business Practice Manual (BPM) for Demand Response for instruction on how to submit a Performance Evaluation Methodology request and Appendix E – DRRS Location Device Type Business Rules and Baseline Method Reference Matrix.
- **SubLAP** The SubLAP in which all the locations within the registration reside
- **DRP SCID** The ID of the acting scheduling coordinator for the Registrations market Resource.

⁵ The system validates effective dates input for the Registration against Location effective dates to determine available Locations that can be registered.

⁶ The system uses DRP, UDC, LSE and SubLAP information provided to ensure Locations presented as available have the same designations.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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- **Program** Proxy DR or Reliability DR
- **Resource Type** Predefined or Custom.
 - Available Locations will be filtered based on the Resource Type selection. When selecting Custom, only Locations with PNODE information can be selected for the Registration.
 - **Custom Resource ID**
 - If the DRP believes that the pre-defined Resource ID is not sufficient for its needs, the DRP selects or requests a custom Resource ID be assigned when the Registration is created. The information provided in the DRRS during the Registrations creation, including PNodes and their applicable Distribution Factors, is to develop the Custom Resource ID. This information is automatically provided from the DRRS to the applicable business unit that will then match this Registration information with the submitted Generator Resource Data Template.
 - For ~~an~~ example (applicable for a PDR or RDRR): ~~-~~A DRP requests a custom Resource ID for 4 end use Loads that have the same LSE and are located in the same Sub-LAP. Based on historic Load of these 4 end use customers, 80% of the Load is connected to Bus 1 and 20% of the Load is connected to Bus 2.

Here is how it will look:

Customer	LSE	Sub-LAP		Location	Registration	GDF	Custom DR Resource ID
1	A	PGF1		Bus 1	Reg 01	0.8	PRMNTE_6_PDRC01
2	A	PGF1		Bus 1	Reg 01		PRMNTE_6_PDRC01
3	A	PGF1		Bus 2	Reg 01	0.2	PRMNTE_6_PDRC01
4	A	PGF1		Bus 2	Reg 01		PRMNTE_6_PDRC01

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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○ Requesting a Custom Resource ID with Dynamic GDF

- If approved by the CAISO, a DRP may submit GDFs as part of its Bid for a given PDR or RDRR. In order to be eligible to submit GDFs as part of a Bid, the DRP must request and receive approval from the CAISO to dynamically Bid GDFs. To request a custom GDF, please contact the PDR coordinator at pdr@caiso.com with the following information: Location of bus, and total MW. The custom GDF can be deployed based on the Master File deployment.

● Resource (Resource ID)

○ When Resource Type = Pre Defined or Custom

- The drop-down list will show available resources that can be selected based on the Registration information provided including Resource IDs previously assigned to the DRP and unassigned Pre Defined resource IDs or Custom Resource IDs for the identified SubLAP.
- The Resource ID naming convention has the letter "C" after the letter "PDR" and Pre defined has the letter "P" after the letter "PDR" for Proxy Demand Resource.

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Note: If no available resource appears in the drop-down list, submit a request to PDR@caiso.com with the following information:

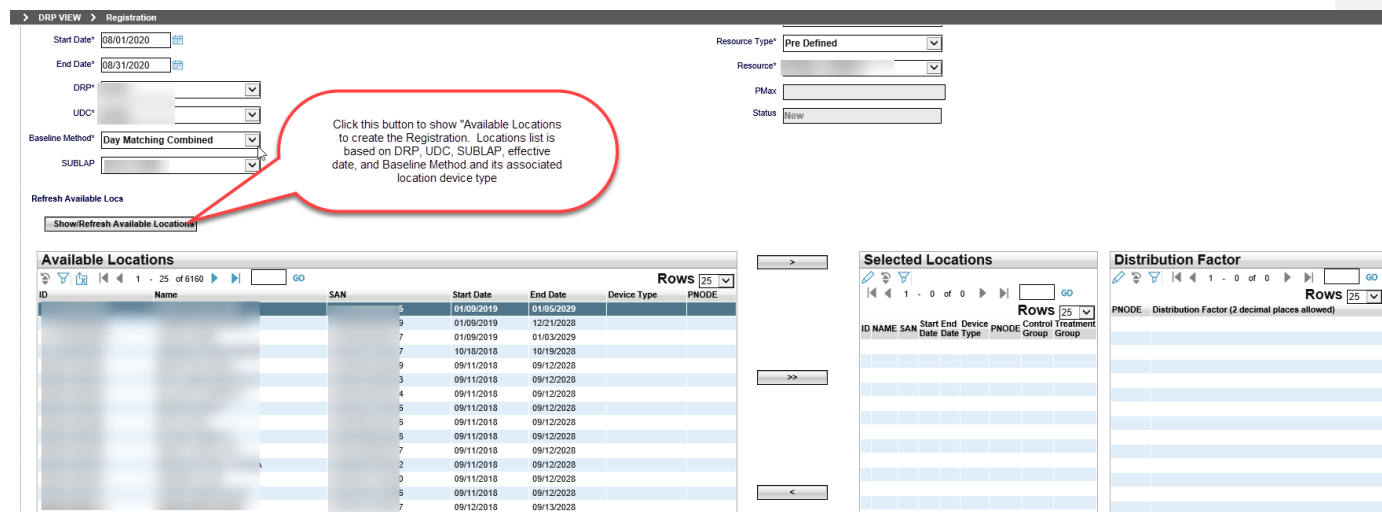
- Is the request for PDR-LSR?
- What Resource Type (i.e. Pre-Defined or Custom)?
- What Program Type (i.e. Proxy DR or Reliability DR)?
- How many Resource IDs do you need?
- What effective date are you requesting?

● Show/Refresh Available Location

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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The system will generate a list of available Locations to select from based on the information provided when creating a Registration. The Locations list is based on DRP, UDC, SubLAP, effective dates, and Baseline method and its associated Location device type (please refer to the Appendices [D](#) and [E](#)).



- To select more than 25 locations, in the **Available Locations**, change the number of **Rows** from 25 to 200. This will allow you to move more than 25 rows to the available locations.
- Move available locations to **Selected Locations** with the arrow buttons.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 <u>10/13/2025</u>
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Distribution Factors for Custom Resource

See Approach 1 above.

4 Registration Management

The registration process builds from Performance/Baseline Methodology to location to registration to resource management.

Registration management includes the development of registration(s) by the DRP that identify the locations participating, in aggregate, as a PDR or RDRR for an effective period of time. Location information established, including its effective dates, control availability for their use by the DRP in creating registrations.

The DRRS provides a robust UI and API's for the DRP(s) use in performing their Registration development and management tasks. System generated email notifications are also generated as alerts to activities occurring that may require their attention.

4.1 DRRS User Interface (UI) Registration Management

The DRP may use either the Location view or Registration view to register one or multiple locations. The Registration view provides the DRP a list of all the Registrations created and saved or submitted with their Status. When highlighted, the view will list all Locations included in that Registration. When using the UI, DRRS limits to 200 locations per registration unless this is loaded using the API.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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4.1.1 Edit

To **Edit** a registration ~~from the registration view~~, the DRP must first select the Registration to be edited then click on the **Edit** button under their Registrations View.

Fields available to edit are Name, Start Date, End Date, and Resource. See below for specific rules for each of these sections:

- **Name** The Registration Name. May contain alphanumeric and special characters, up to a max of 255
- **Start Date** The Effective Start Date of the Registration. Cannot edit Start Date if the registration's Start Date is in the past. If existing Start Date is in the future, Start Date can get pushed out further in the future, but cannot be made sooner.
 - Note: If a future Start Date is chosen and the Registration is successfully updated, DRP cannot return to Edit Registration and select original Start Date again, as the original Start Date is now prior to the existing Start Date.
- **End Date** The Effective End Date of the Registration. The End Date cannot be a prior date, a date before the Start Date, or a date that overlaps with an existing Confirmed Registration with same SAN and UDC assignment. The End Date can be no less than 6 Business Days from the request processing date. End Date cannot be the same as the Start Date if the Start Date is within 5 Business Days from the request processing date.

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Note: ~~If If modifying the End Date, DRP does not need a specific End Date, or is looking to cancel a future registration, they can utilize the "Terminate" function to assign the earliest possible end date to the registration instead; the system will determine the proper end date of the registration based on 5 business days. The 5 business day window is to align with the Master File submission process. See Section 4.1.3 for more information.~~

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 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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• **Resource** Resource ID,

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> DRP VIEW > Registrations

Reg Id Reg Name
 DRP UDC LSE
 SUBLAP Updated Since DateTime

Create Edit Copy Terminate Delete

Registrations

Select Reg ID Name

DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource ID	Resource Type
							Pre Defined
							Pre Defined

A Registration Status will affect how it can be edited.

Edit Registration

Reg Id* 11544235

Name* Reg Test Count150 v2

Start Date* 07/01/2020

End Date* 07/31/2020

DRP*

UDC*

LSE

SUBLAP*

DLAP

DRP SC

PDRP10

Baseline Method* Control Group

Status Confirmed

Cancel Update

A Registration with a "Confirmed" status editable field in white.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Once the Registration is edited, the options to proceed include:

Cancel - Cancels Edit of the Registration.

Update - Updates the Registration maintaining its Registration ID.

4.1.2 Copy

The **Copy** feature allows the DRP to create a new registration by copying an existing registration and making changes to the copied field information. Registrations in any status may be copied. To **Copy** a registration, the registration is first selected then the **Copy** button chosen under the Registrations View.

Note: -If using this functionality for extending out a registration on a registration that is approaching end-date, verify the information including the Resource ID is the same and locations are not used in another registration prior to submitting.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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DRP VIEW

DRP VIEW

Registrations

Reg Id Reg Name

DRP

[ALL]

UDC

[ALL]

LSE

[ALL]

SUBLAP

[ALL]

 Updated Since DateTime

Create

Edit

Copy

Terminate

Delete

Registrations

Select a Registration

GO

Select Registrations

	Name	DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource
☒								

The Copy option takes the user to the Registration window and provides the same Options as Create registration:

Cancel - cancels the creation of a new registration.

Save - creates a new registration with changes and registration ID for it.

4.1.3 Terminate

The **Terminate** feature allows the DRP to end-date a Registration with an automatically assigned End Date. Registrations can only be end-dated when they are in the Confirmed status. The system will determine the earliest available proper end date, depending on the Start Date of the registration of the registration.

Note: This feature is only available if the existing End Date is currently further than 6 business days from the current day.

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 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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If the registration has a Start Date prior to the current date, the new End Date will be ~~based on the~~ 5 business days from the current date. The 5 business day window aligns with the Master File submission process.

Note: This does not apply if the existing End Date is within 3 business days. A registration is considered "frozen" when the End Date is within 3 business days and cannot be changed.

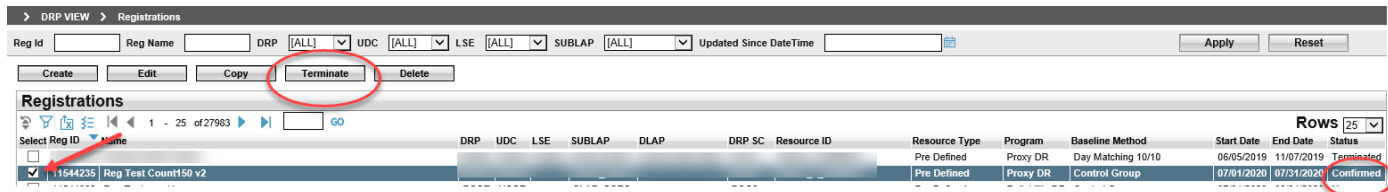
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If the registration has a Start Date in the future, the new End Date will be the exact same date and time as the Start Date, effectively canceling the registration.

Note: In the UI, the new End Date will appear to be the day prior to the Start Date.

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To **Terminate**, the Registration is first selected then the **Terminate** button chosen under the Registration View.



The screenshot shows the 'DRP VIEW > Registrations' interface. At the top, there are filters for Reg ID, Reg Name, and various status codes (DRP, UDC, LSE, SUBLAP, DLAP, DRP SC, Resource ID). Below the filters are buttons for 'Create', 'Edit', 'Copy', 'Terminate', and 'Delete'. The 'Terminate' button is circled in red. Below the buttons is a table of registrations. The first row is selected, and its status 'Confirmed' is circled in red.

Reg ID	Reg Name	DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource ID	Resource Type	Program	Baseline Method	Start Date	End Date	Status
11544235	Reg Test Count150 v2								Pre Defined	Proxy DR	Day Matching 10/10	06/05/2019	11/07/2019	Terminated
11544235	Reg Test Count150 v2								Pre Defined	Proxy DR	Control Group	07/01/2020	07/31/2020	Confirmed

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Once **Terminate** is selected, the Registration to be end-dated will be identified and ~~a confirmation~~confirmation to terminate is required by selecting the **Continue** button.

Are you sure you want to Terminate above Registrations?

In the DRRS UI, Aa Registration is in a Terminated status when its effective end date is prior to the current date. Terminated Registrations are logically equivalent to deleted records. A Terminated Registration can be Copied but not Edited.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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4.2 Application Programming Interface (API) Registration and Resource Management

The DRRS provides APIs for the performance of all Registration management processing. Market Participants can retrieve or submit the following Registration data via the DRRS web services:

- Retrieve status for the creation or modification requests
- Retrieve DRRS Registrations
- Retrieve Locations
- Save request for creating new DRRS Registrations
- Delete request for deleting the /new DRRS Registrations
- Submit request for creating/terminating (end-date) DRRS Registrations
- Modify request for modifying (edit) DRRS Registrations

Technical ISO Interface Specifications with more detailed information are available on the ISO Developer website at <https://developer.caiso.com>. Login permission is required, and users can sign up on the website provided.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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5 Helpful Links

Document	Link
Application Access Request Form Reference Guide	http://www.ca.iso.com/Documents/ApplicationAccessRequestFormReferenceGuide.pdf
Access and Identity Management (AIM) User Guide	http://www.ca.iso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf
Energy Storage and Distributed Energy Resources 3B External Training Presentation	http://www.ca.iso.com/Documents/EnergyStorage_DistributedEnergyResources_Phase3B.pdf
Demand Response and Proxy Demand Resources FAQ	http://www.ca.iso.com/Documents/DemandResponseandProxyDemandResponseFAQversion5.xls
Demand Response Provider Agreement Information Request Sheet	http://www.ca.iso.com/Documents/DemandResponseProviderAgreementInformationRequestSheet.doc
Direct Telemetry BPM	http://bpmcm.ca.iso.com/Pages/BPMDetails.aspx?BPM=Direct Telemetry

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Document	Link
External User Application Access request Form	http://www.caiso.com/Documents/UserApplicationAccessRequestForm.xls
ISO Connected Entity Service Guide	http://www.caiso.com/Documents/ISOConnectedEntityServiceGuide.pdf
List of certified SC's	http://www.caiso.com/Documents/List-SchedulingCoordinators_CRRHoldersandConvergenceBiddingEntities.pdf
List of Demand Response Participants	http://www.caiso.com/Documents/ListofDemandResponseParticipants.pdf
Load and Demand Response Page	http://www.caiso.com/participate/Pages/Load/Default.aspx
Load Serving Entity Request (LSE ID) Form	http://www.caiso.com/Documents/LoadServingEntityIDRequestForm.doc

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Document	Link
Meter Service Agreement ISO Metered Entities Information Request Sheet	http://www.caiso.com/Documents/MeterServiceAgreement_ISOMeteredEntitiesInformationRequestSheet.doc
Meter Service Agreement Scheduling Coordinators Information Request Sheet	http://www.caiso.com/Documents/MeterServiceAgreement_SchedulingCoordinatorsInformationRequestSheet.doc
Metering BPM	http://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Metering
New Resource Implementation Checklist	http://www.caiso.com/Documents/NewResourceImplementationChecklist.xlsx http://www.caiso.com/Documents/NewResourceImplementationChecklist.xls
Requirements for becoming and Scheduling Coordinator	http://www.caiso.com/participate/Pages/SchedulingCoordinator/Default.aspx
Reliability Demand Response Resource Training Requirements for becoming and Scheduling Coordinator	http://www.caiso.com/Documents/ReliabilityDemandResponseResourceOverview.pdf

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Document	Link
Energy Storage Distributed Energy Resources customer partnership group meeting artifacts including presentation	http://www.caiso.com/Documents/Presentation-EnergyStorage-DistributedEnergyResourcesPhases2-3-ImplementationCustomerPartnershipGroup-May6-2019.pdf
Energy Storage Distributed Energy Resources – Phase 3 -Business Requirements	http://www.caiso.com/Documents/BusinessRequirementsSpecificationClean-EnergyStorageandDistributedEnergyResourcesPhase3.pdf
DRRS Enhancement -Demand Response Location Registration Enhancement – Technical Specifications	http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspxhttp://www.caiso.com/Documents/DemandResponseLocationRegistrationEnhancement-TechnicalSpecificationsv4REDLINED.pdf
DRRS Enhancement -Summary of Use Case for Demand Response Solutions Registrations	http://www.caiso.com/Documents/SummaryofUseCaseforDemandResponseSolutions-Registrations.pdf
DRRS Enhancement -Location and Registration Life Cycle	http://www.caiso.com/Documents/LocationandRegistrationLifecycle.pdf
DRRS Enhancement -Summary of Use Case for Demand Response Solutions Locations	http://www.caiso.com/Documents/SummaryofUseCaseforDemandResponseSolutions-Locations.pdf

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Document	Link
Example – Day Match Workbook	http://www.caiso.com/Documents/Example-DayMatchWorkbook.xlsx
Example – Day Randomization Validation	http://www.caiso.com/Documents/Example-RandomizationValidationTemplate.xlsx
Example – Weather Match Workbook	http://www.caiso.com/Documents/Example-WeatherMatchWorkbook.xlsx
GRDT and IRDT Definitions	http://www.caiso.com/Documents/GRDTandIRDTDefinitions.xls
Generator Resource Data Template (GRDT)	http://www.caiso.com/Documents/GeneratorResourceDataTemplate_ForNewDemandResponse.xls
Full Network Model Pricing Node	http://www.caiso.com/Documents/FullNetworkModel_PricingNodeMapping_Based_FullNetworkModel_ReleaseDB2019Q2.xls

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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6 Revision History

Date	Version	Updated By	Description
03/24/15	3.7	Monica	Added info on BUS Pnode
03/25/15	3.7	Monica	Added the following info to the LSE and UDC Commenting on a Registration sections Note: The Comments box is limited to <u>255</u> characters. If the LSE review generates comments larger than 255 characters. When a comment is provided by the LSE indicating that there is a "review with findings" within the registration information, the CAISO will deny the registration. The DRP is required to resolve any issues related to the "findings" with the appropriate party. During that time, additional detail may be exchanged by parties to resolve all issues determined in the review process. CAISO's responsibility is to look for general comments as to why there is an issue with the registration and therefore does not require listing of multiple SANs that may be in conflict with availability to participate. The 255 character limitation should be sufficient to provide the CAISO with enough information to deny the registration and request issue resolution be made between the parties outside of the registration process. If the CAISO determines that there is error in the registration detail that needs to be corrected by the DRP, the registration will be denied as a means to alert the DRP of corrective actions that are being requested by the CAISO.
06/04/15	3.8	Monica M.	Updated the sections pertaining to requesting for a DRP/LSE/UDC ID and OMS.
06/05/15	3.9	Monica M.	Added clarifying language for terminating location(s)/ALOC(s).

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Date	Version	Updated By	Description
11/05/15	3.9	Monica M.	Incorporated the Jill's Demand Response Resource Participation Guide into the current Demand Response User Guide document and removed the original document off the external site.
04/12/16	3.10	Monica M.	Added clarifying language for Reliability Demand Response Services Term. Summer term runs from June through September – Winter term runs from October through May
4/19/16	3.11	Monica M.	Updated link on page 129 regarding the XML test materials. http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=6A0B3CBD-4EE0-4BCD-B44F-CBB9E711D31F
10/01/16	4.0	Jill Powers	Updated User Guide to include information related to the Enabling Demand Response Phase II for the PDR/RDRR Registration functionality transfer from DRS to DRRS. Updates to include new baseline and statistical sampling methodologies approved as part of Energy Storage and Distributed Energy Resource Initiative.
12/06/16	4.1	Monica M.	Updated the section on “Generation Resource Data Template Submission and Processing”. Going forward, all GRDTs shall be submitted to RDT@caiso.com and no longer to hdr@caiso.com .

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Date	Version	Updated By	Description
12/13/16	4.2	Monica M.	Updated the Market Participation chart under Customer Baseline Methodology.
5/5/2017	4.3	Tim B.	Completed unfinished sentence on last bullet of page 170 and changed page 84 to remove RDRR from statement regarding necessity of telemetry.
10/26/2018	4.4	Pia S.	Updated User Guide to include information related to the Energy Storage and Distributed Energy Phase II for the PDR/RDRR process and application.
10/31/2018	4.5	Pia S.	Updated sections: Purpose, Performance Evaluation/Baseline Methodology, “Generator Data Submission and Processing” for Custom Resource ID, and Telemetry.
8/16/2019	4.6	Pia S.	Updated: Removed sections related to business process to BPM for Demand Response, ESDER3a, DRRS Automated Email Notification, Application Access, helpful links Added: Appendix C, and Notes in Appendix A.
8/22/19	4.6a	Pia S.	Removed notes in section 3.3

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 <u>10/13/2025</u>
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Date	Version	Updated By	Description
11/7/19	4.7	Pia	Updated sections: - Title of the User Guide from Demand Response to Demand Response Registration User Guide. - 1.3 Application Access - 1.4 DRRS Automated Email Notification - 2.1 Locations - 2.3.1.2 Column Headers - 3.1.1 Edit - 3.1.5 Defend - Appendix A – Three (3) Cases of Defend Process.
7/22/20	4.8	Pia	Updated for ESDER 3B initiative – sections 3, 4.2, Appendix B, Helpful Links, Definitions, and UI screenshots due to WebSD changes. Added for ESDER 3B initiative – Appendices D through F.
10/27/2020	4.9	Pia	Updated Appendix E, Definitions for “ES”, section 3.3 Creating Registration for Resource ID validation rules, and resource ID request.
11/1/2024	5.0	Hewayda Ahmed	Updates to 1.5 Automated Email Notification; Updates to Section 3: UDC and LSE Review process changed from 10 business days to 5 business days; Updates to DRRS User Roles Table
<u>10/9/2025</u>	<u>5.1</u>	<u>Haley Mikeska</u>	<u>General updates to all sections for grammar and clarity</u> <u>Updates to Sections 3, 4, and Appendix A to align with CCFIM DRRS MRIS Baseline 2025 Enhancements</u>

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Appendix A – Three (3) Possible Cases of Defend Process

All three (3) possible cases of defend process below starts with:

1) Prospective DRP submit Location for approval through the UI.
2) The Prospective DRP receives a message, "A Location with given SAN and UDC combination already exists, do you want to continue and initiate the Defend Process?" Prospective DRP complete all the required fields... name, phone number, and comments. The Location for the SAN will be in " Duplicate " status after initiating the defense process.
3) The Incumbent DRP Locations screen will show a status of Defense Active = Y, and the Defense Start, and Defense End.
4) The Incumbent DRP may receive an email notification that "their location(s) has triggered the location defense process".

1. If Incumbent DRP <u>accepts</u> the Prospective DRP claim to the customer.
See steps 1-4 above.
5) The Incumbent DRP accepts the prospective DRP claim by releasing the Location for the SAN. 1. On the Locations screen, select the Location under the defense process, click " Defend ". A "Selected Locations" screen will appear. <u>Do not</u> check the "Valid Location" box. Enter your name, Phone number, and Comment, and click "Continue"
6) The system will automatically update the "End Date" of the incumbent's DRP location and change the status of the Prospective DRP's Location from " Duplicate " to " Pending " for LSE and UDC approval.
7) The Prospective DRP's Location status changes to " Inactive " after approved by the LSE and UDC.
8) The Prospective DRP creates Registration for the Location.
2. Incumbent DRP <u>rejects</u> the Prospective DRP claim to the customer.
See steps 1-4 above.
5) The Prospective DRP's Location for the SAN will remain in the " Duplicate " status as the Incumbent DRP still owns the Location in an " Active " or " Inactive " status.

- a. On the Locations screen, select the location in defense process and click **"Defend"**.

Status is based on whether the Location is part of a Registration see section 2.5 for "Inactive" and "Active"

PNODE	Start Date	End Date	Status	Defense Active?	Defense Start	Defense End
			(ALL)	☒		

b. Check the "Valid Location" box, Review Name, Phone number, and Comments.

115

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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7) After the Incumbent DRP rejects the Prospective DRP claim, the Defense Active flag, Defense Start, and End Date will be blank.												
8) The Prospective DRP will see the comments on the Locations screen > Location Defend Details – Incumbent.												
▼ Location Defend Details - Incumbent  <table><tr><th>Incumbent Name</th><th>Incumbent Contact Info</th><th>Incumbent Comments</th><th>Prospective Name</th><th>Prospective Contact Info</th><th>Prospective Comments</th></tr><tr><td>Name</td><td>916-351-0000</td><td>Incumbent Reason for rejecting the claim here</td><td>pia</td><td>000-000-0000</td><td>test</td></tr></table>	Incumbent Name	Incumbent Contact Info	Incumbent Comments	Prospective Name	Prospective Contact Info	Prospective Comments	Name	916-351-0000	Incumbent Reason for rejecting the claim here	pia	000-000-0000	test
Incumbent Name	Incumbent Contact Info	Incumbent Comments	Prospective Name	Prospective Contact Info	Prospective Comments							
Name	916-351-0000	Incumbent Reason for rejecting the claim here	pia	000-000-0000	test							
9) If the Prospective DRP agrees with the Incumbent, the Prospective DRP can <u>end date</u> or <u>delete</u> the Location. If the Prospective DRP disagrees during the defense process, they must contact the Incumbent DRP to resolve the duplicate use conflict outside of the ISO registration process.												
3. Incumbent DRP takes <u>no action</u> within the 10 business day window.												
See steps 1-4 above. 5) If the Incumbent DRP takes no action , the system will automatically end-date the Incumbent DRP’s Locations, and its corresponding Registration <u>after</u> the 10 business days. The Incumbent DRP loses the Location, and the Prospective DRPs Location status will change from “Duplicate” to “Pending”. In addition, the system will update the end date to 5 business days out for the location in the defend process and its corresponding registration <u>unless the corresponding registration ends before the new end date, in which case it will remain unchanged.</u>												

* The email notification from DRRS will be sent out the following day, and to only to those that are currently registered in the database. See DRRS Automated Email Notification section 1.4.

Note: -As a result of the Defend process, the Location's Review Start Date may have a start date after the Location's Start Date, depending on when the LSE/UDC review process is triggered.

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Appendix B – Editable field(s) by Locations Status

Locations Status

New		
Start Date		Yes
Fields	Validation Rules	Editable (Yes/No)
Name		Yes
Start Date		Yes
End Date		Yes
Address (1 and/or 2)		Yes
City		Yes
State		Yes
Zip		Yes
LOC ID		Yes

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 <u>10/13/2025</u>
DEMAND RESPONSE REGISTRATION USER GUIDE			

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SAN		No
DRP		Yes
UDC		Yes
SUBLAP		Yes
PNODE		Yes
Device Type		Yes
Pending		
Cannot be edited. The Pending Location(s) only allows for end dating.		
Duplicate		
Cannot be edited. The Duplicate Location(s) only allows for end dating.		
Inactive		
Fields	Validation Rules	Editable (Yes/No)
Name		Yes
Start Date	IF Update > Existing/Recorded	THEN Yes ELSE No
End Date	IF Update < Existing/Recorded	THEN Yes ELSE No
Address		Yes
City		Yes

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

Formatted: Font: 11 pt

State		Yes
Zip		Yes
LOC ID		No
SAN		No
DRP		No
UDC		No
SUBLAP		No
PNODE		No
Device Type		No
Active		
Fields	Validation Rules	Editable (Yes/No)
Name		Yes
Start Date		No
End Date	IF Update < Existing/Recorded	THEN Yes ELSE No
Address		Yes
City		Yes
State		Yes

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Zip		Yes
LOC ID		No
SAN		No
DRP		No
UDC		No
SUBLAP		No
PNODE		No
Device Type		No

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Appendix C - Customer Market Results Interface (CMRI)

Viewing Total Expected Energy (TEE)

 California ISO

Customer Market Results Interface

Day-AheadReal-TimePost-MarketDefault BidsConvergence BiddingForecastReferenceLSEEnergy Imbalance Market

Trade Date: 02/04/2019

Expected Energy

Trade Date SC ID

No Data found

Report Generated: 03/26/201

Confirmed Dispatch Notice (CDN)

CRN

Expected Energy Allocation Details

Expected Energy

ISO Commitment Details

Non-Dispatchable Time Ranges

Resource Level Movement

Regulation Pay for Performance

CRR Revenue Adjustments

CRR Revenue Adjustments Details

Filter: [ALL]

ApplyReset

Start Hour	Interval	Energy Type	Real-Time Market Type	Expected Energy [MWH]
------------	----------	-------------	-----------------------	-----------------------

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 <u>10/13/2025</u>
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California ISO Customer Market Results Interface

[Day-Ahead](#)
[Real-Time](#)
[Post-Market](#)
[Default Bids](#)
[Convergence Bidding](#)
[Forecast](#)
[Reference](#)
[LSE](#)
[Energy Imbalance Market](#)
[Phase Shifter](#)
[Gas Bur](#)

Trade Date: 05/06/2019 Entity: [] Resource: 0 item(s) Apply Reset
 Hour: [ALL] Interval: [ALL]

TEE

Expected Energy

Trade Date	SC ID	Resource	Configuration	Hour Ending	Interval	Energy Type	Real-Time Market Type	Expected Energy [MWH]	OeOverlapMss [Yes/No]
05/06/2019				20	12	RAMPT		-0.000104166	NO
05/06/2019				20	12	RED	RTD	-0.000312499	NO
05/06/2019				20	12	SRE		0.000312499	NO
05/06/2019				20	12	TEE		0.000000000	NO
05/06/2019				20	12	TTEE		-0.000104166	NO
05/06/2019				21	1	DABE		0.000833333	NO
05/06/2019				21	1	DASE		0.000833333	NO
05/06/2019				21	1	RAMPT		-0.000104167	NO
05/06/2019				21	1	RED	RTD	0.000104167	NO
05/06/2019				21	1	SRE		-0.000312500	NO
05/06/2019				21	1	TEE		0.000625000	NO
05/06/2019				21	1	TTEE		0.000520833	NO
05/06/2019				21	2	DABE		0.000833333	NO
05/06/2019				21	2	DASE		0.000833333	NO
05/06/2019				21	2	RED	RTD	0.000104167	NO
05/06/2019				21	2	SRE		-0.000104167	NO
05/06/2019				21	2	TEE		0.000833333	NO
05/06/2019				21	2	TTEE		0.000833333	NO
05/06/2019				21	3	DABE		0.000833333	NO
05/06/2019				21	3	DASE		0.000833333	NO

Report Generated: 05/15/2019 13:15:34

Information in this document is subject to change.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
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Appendix D – Tips for Creating Registrations by Baseline Method table

Program	Resource Type	Baseline Method	Notes						
Proxy DR	Predefined or Custom	All Baseline Methods	- For all PDR-LSR Baseline Methods: ➤ PDR-LSR ➤ PDR-LSR+Day Matching 5/10 ➤ PDR-LSR+Day Matching 10/10 ➤ PDR-LSR+Weather Matching ➤ PDR-LSR+Day Matching Combined DRRS store only the <i>Curtailment</i> Resource ID. The Resource ID contain a substring, 'CUR'. Examples of the naming convention is in the table below: <table><tr><td></td><td>Curtailment ID</td></tr><tr><td>Pre-defined Resource</td><td>ABCD_x_PDRPCURxxx</td></tr><tr><td>Custom Resource</td><td>ABCD_x_PDRCCURxxx</td></tr></table> For Master File, the GRDT must include 2 resource IDs, Curtailment and Consumption resource IDs. <u>An example of the a pre-defined PDR-LSR resource ID for Master File submittal:</u> ABCD_1_PDRPCUR001 ABCD_1_PDRPCON001		Curtailment ID	Pre-defined Resource	ABCD_x_PDRPCURxxx	Custom Resource	ABCD_x_PDRCCURxxx
	Curtailment ID								
Pre-defined Resource	ABCD_x_PDRPCURxxx								
Custom Resource	ABCD_x_PDRCCURxxx								

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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			- The business rules for location's device type applies to all Baseline Methods, please refer to BPM for DR, Appendix E – DRRS Location Device Type Business Rules and Baseline Met. - Control Group must have at least 150 control group locations and 1 treatment group location.
Reliability DR	Predefined or Custom	1. MGO+Day Matching 5/10 2. MGO+Day Matching 10/10 3. MGO+Day Matching Combined 4. MGO+Weather Matching 5. Meter Generation Output 6. Matching Combined 7. Day Matching Combined 8. Day Matching 10/10 9. Day Matching 5/10 (Residential Only) 10. Weather Matching 11. Control Group	- The business rules for location's device type applies to all Baseline Methods, please refer to BPM for DR, Appendix E – DRRS Location Device Type Business Rules and Baseline Met. - Control Group must have at least 150 control group locations and 1 treatment group location.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
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Appendix E- DRRS Location Device Type Business Rules and Baseline Method Reference Matrix

Business Rules for Location Device Type:

A summary of the baseline method criteria in relation to its associated location business rule:

Baseline Method	Need at least one location with a device type equal to	
	Energy Storage (ES)	Electric Vehicle Supply Equipment (EVSE)
1. PDR-LSR 2. PDR-LSR+Day Matching 5/10 3. PDR-LSR+Day Matching 10/10 4. PDR-LSR+Weather Matching 5. PDR-LSR+Day Matching Combined 6. MGO+Day Matching 5/10 7. MGO+Day Matching 10/10 8. MGO+Day Matching Combined 9. MGO+Weather Matching 10. Meter Generation Output	Yes	
1. EVSE res 2. EVSE res+Day Matching 5/10 3. EVSE res+Day Matching 10/10 4. EVSE res+Day Matching Combined 5. EVSE res+Weather Matching 6. EVSE non-res 7. EVSE non-res+Day Matching 10/10 8. EVSE non-res+Weather Matching 9. EVSE non-res+Day Matching Combined		Yes

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
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Baseline Method	Need at least one location with a device type equal to	
	Energy Storage (ES)	Electric Vehicle Supply Equipment (EVSE)
1. Day Matching Combined 2. Day Matching 10/10 3. Day Matching 5/10 (Residential Only) 4. Weather Matching 5. Control Group		

DRRS Location Device Type Baseline Method Reference Matrix:

Location Device Type	Baseline Methods for Registration
Energy Storage (ES)	PDR-LSR* PDR-LSR+Day Matching 5/10* PDR-LSR+Day Matching 10/10* PDR-LSR+Weather Matching* PDR-LSR+Day Matching Combined* MGO+Day Matching 5/10* MGO+Day Matching 10/10* MGO+Day Matching Combined* MGO+Weather Matching* Weather Matching Meter Generation Output Day Matching Combined Day Matching 10/10 Day Matching 5/10 (Residential Only) Control Group

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 <u>10/13/2025</u>
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Electric Vehicle Supply Equipment (EVSE)	EVSE res* EVSE res+Day Matching 5/10* EVSE res+Day Matching 10/10* EVSE res+Day Matching Combined* EVSE res+Weather Matching* EVSE non-res* EVSE non-res+Day Matching 10/10* EVSE non-res+Weather Matching* EVSE non-res+Day Matching Combined* Weather Matching Day Matching Combined Day Matching 10/10 Day Matching 5/10 (Residential Only) Control Group
Neither ES Nor EVSE	Day Matching Combined Day Matching 10/10 Day Matching 5/10 (Residential Only) Weather Matching Control Group
Both ES and EVSE	PDR-LSR* PDR-LSR+Day Matching 5/10* PDR-LSR+Day Matching 10/10* PDR-LSR+Weather Matching* PDR-LSR+Day Matching Combined* MGO+Day Matching 5/10* MGO+Day Matching 10/10* MGO+Day Matching Combined* MGO+Weather Matching*

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 10/13/2025
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Weather Matching EVSE res* EVSE res+Day Matching 5/10* EVSE res+Day Matching 10/10* EVSE res+Day Matching Combined* EVSE res+Weather Matching* EVSE non-res* EVSE non-res+Day Matching 10/10* EVSE non-res+Weather Matching* EVSE non-res+Day Matching Combined* Meter Generation Output Day Matching Combined Day Matching 10/10 Day Matching 5/10 (Residential Only) Control Group
--

Note: Baseline methods in asterisk (*) are new with ESDER 3B and those not in asterisk (*) are existing methods.

 California ISO	External Use	Version No.	5.01
		Effective Date	11/1/2024 <u>10/13/2025</u>
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Appendix F– Example of Creating a Registration using Control Group Baseline Method

A minimum of 150 Control Group Locations and at least 1 Treatment Group must be selected. See the BPM for Demand Response for more details on the requirements for Baselines.

California ISO | Demand Response Registration System

DRP VIEW | LOC VIEW | USE VIEW | ADMINISTRATION

DRP Registration

DRP:

DRP

LOC

USE

Baseline Method:

Control Group

SUBSET:

Refresh Available Locations

Available Locations

Selected Locations

Distribution Factor

 California ISO	External Use	Version No.	5.0 <u>1</u>
		Effective Date	11/1/2024 10/13/2025
DEMAND RESPONSE REGISTRATION USER GUIDE			

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Note: DRRS limits 200 locations per registration unless this is loaded using the API.

Once the Registration information is complete, Locations have been selected and Distribution Factors updated (for custom resource id), the options to proceed include:

- **Cancel** - cancels the creation of the Registration
- **Save** - creates a new Registration and Registration ID for it.
- **Submit** - creates a new Registration and Registration ID for it and submits for registration.

Once the new Registration information has been created and saved or submitted, a new **Registration ID (Reg ID)** will be generated.

When saved, the locations **Status** will be displayed as **New**.

DRP VIEW | UDC VIEW | LSE VIEW | ADMINISTRATION

DRP VIEW

Registrations

Reg ID

Reg Name

DRP

UDC

LSE

SUBLAP

DLAP

Apply

Reset

Create

Edit

Copy

Terminate

Delete

Select Reg ID

Name

DRP

UDC

LSE

SUBLAP

DLAP

DRP SC

Resource ID

Resource Type

Program

Baseline Method

Start Date

End Date

Status

542813

Create_Reg_Prefined

Pre Defined

Proxy DR

10 in 10 with SMA

09/01/2016

09/30/2016

New

542721

DRSouthbay

Pre Defined

Proxy DR

10 in 10 with SMA

09/01/2016

09/30/2016

Confirmed

Locations

Loc ID

SAN

Resource ID

Start date

End date

Distribution Factor

View Location

542827

PT121246

09/01/2016

09/30/2016

View Location

542841

UDC_LSE_NEW_1

09/01/2016

09/30/2016

View Location

When submitted, the locations **Status** will be displayed as **Confirmed**.