




## Demand Response Registration User Guide

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Version 45.90


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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 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 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.


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Other applications that maybe applicable, and utilized by Scheduling Coordinator who participates 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 maybe 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 a SC and a 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 maybe used to generate the following reports. [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 a 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.


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- 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 displays 5 minute dispatch operating target (DOT) for Demand Response.

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## 1.3 Definitions

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

Terms	Definition
<b>AARF</b>	Application Access Request Form – method used to provision access to users of the DRS
<b>Address information</b>	The physical address of the location.
<b>ADS</b>	Automated Dispatch System
<b>AIM</b>	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).
<b>AIMS</b>	Access and Identity Management System – application used to provision access to users of the DRRS
<b>API</b>	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.
<b>BTM</b>	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.
<b>Custom Resource ID</b>	A unique resource ID requested by the DRP, modeled with their specified nodal locations and associated generation distribution factors (GDF).
<b>Customer</b>	The name of the customer that user assigned during the registration process.


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Terms	Definition
<b>Device Type</b>	The physical device that is installed at the service account location. This can either be Energy Storage, Electric Vehicle Supply Equipment or both.
<b>DLA Resource</b>	The DLAP in which the Locations of the Registration resides.
<b>DLAP</b>	Default Load Adjustment Point
<b>DRP</b>	Demand Response Provider
<b>DRP SC</b>	Demand Response Provider Scheduling Coordinator who are responsible for submitting bids into the market and meter data to the MRI-S.
<b>DRRS</b>	Demand Response Registration System. Allows users to create large volumes of locations and aggregate locations for participation in the ISO's demand response program.
<b>DRRS UI</b>	Demand Response Registration System User Interface
<b>End Date</b>	End date of registration. The end date when the Registration will become inactive.
<b>Endorsed User</b>	Individual(s) outside of the company that is requesting for application access.
<b>ES</b>	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.
<b>EVSE</b>	Electric Vehicle Supply Equipment
<b>Load Reduction</b>	The total Load Reduction capacity per location.
<b>Location name</b>	Identifies the location/site for the user.


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Terms	Definition
<b>Locations</b>	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.
<b>LSE</b>	Load Serving Entity
<b>New Custom PDR</b>	CAISO will develop a new resource ID for this registration (custom).
<b>PDR</b>	Proxy Demand Resource
<b>PDR-LSR</b>	Proxy Demand Resource – Load Shift Resource. An enhancement of the PDR participation model that facilitates participation of both curtailment and consumption of load.
<b>Pnode</b>	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.
<b>POC</b>	Point of Contact now referred to as UAA.
<b>Pre-Defined Resource ID</b>	A pre-established resource ID pre-modeled in each SubLAP based on CAISO specifications and available in the MasterFile for DRP to request assignment to a registration.
<b>RDRR</b>	Reliability Demand Response Resource
<b>RegID</b>	The registration ID number assigned to the registration by the Demand Response System; this ID is assigned by the DRRS in sequential order.
<b>Registration</b>	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.

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Terms	Definition
<b>Resource ID</b>	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.
<b>SAN</b>	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.
<b>Start Date</b>	Start date of the registration (cannot overlap with existing registration for the same location).
<b>SubLAP</b>	One of the 23 SubLAP locations of CAISO. The SubLAP in which all the locations within the registration reside.
<b>UAA</b>	User Access Administrator formerly known as the POC.
<b>UDC</b>	Utility Distribution Company. The UDC in which the Locations in the Registration reside and is part of the approval process.
<b>UDC Account #</b>	This is the account number a DRP receives from a UDC for billing.

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## 1.31.4 Application Access

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

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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](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 request shall be performed through the AIM UI application.

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

In AIM, for existing using user 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**
- 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.

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- 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 type 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.

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- ☐ 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 a request for both the production and market simulation/map stage environments is recommended.

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## 1.4 DRRS Automated Email Notification

### 1.5


The DRP shall send contact information ~~to PDR@caiso.com using 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 need the incumbent DRP's attention.

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Common Email Address (this is a <b>group email distribution list</b> will be used for DRRS email notifications)	Org <del>anization</del> Name	DRP ID

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## 1.51.6 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)
<b>DRP</b>		X	DRP can create, modify and end-date locations and create, modify and terminate registrations.
<b>UDC</b>	X		UDC can review and submit comment(s) on location info and view registrations containing those locations
<b>LSE</b>	X		LSE can review and submit comment(s) on location info and view registrations containing those locations.

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## 2 DRRS Functionality Overview

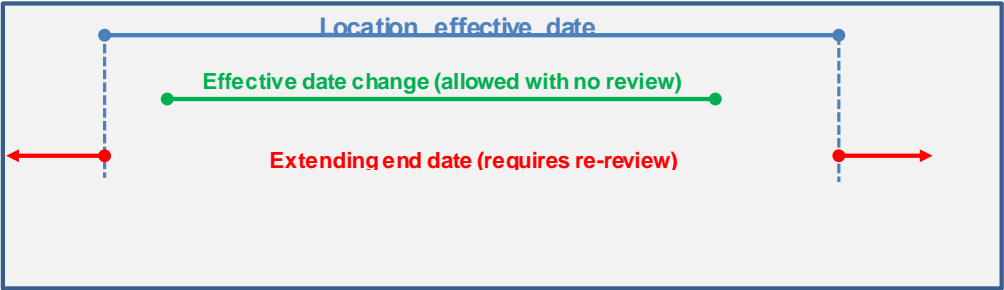
In DRRS, there are two functionality tabs: (1) Locations, (2) Registrations


- 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 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 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.

Figure 1



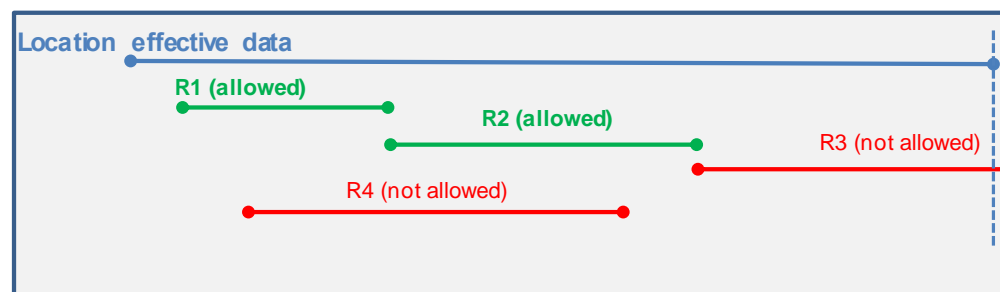
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## 2.2 Registrations

- Effective dates are validated against location effective dates.
- Multiple registrations can be created within location effective dates (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.
- 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



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## 2.3 Application Layout

### 2.3

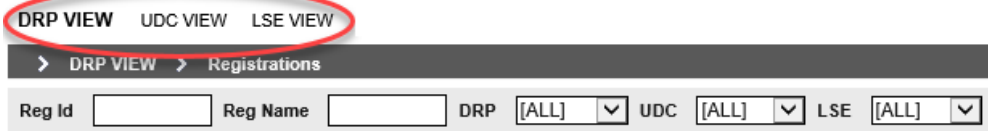
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#### 2.3.1.1 Role-based tab views


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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.

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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.

Example: LSE VIEW Locations

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LSE VIEW

LSE VIEW > 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
---------------	------	-----	-----	-----	-----	--------	-------------	-------	------------	----------	--------------	--------

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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

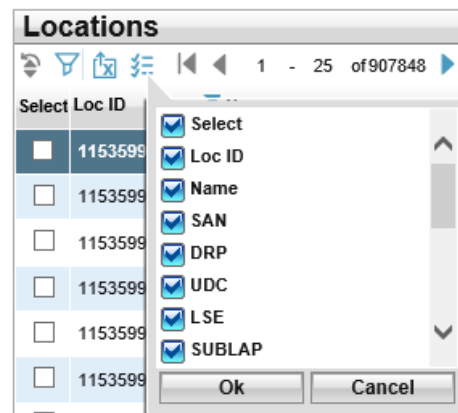
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### 2.3.1.2 Column Headers

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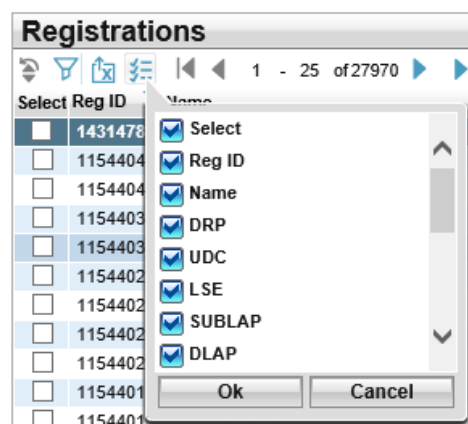
In the **Locations** tab, users can choose what columns they would like visible at anytime. These options include: Loc Id, Loc Name, SAN, ~~DRP-ID~~, ~~UDC-ID~~, ~~LSE-ID~~, ~~SUBLAP~~, Device Type, PNODE, Start Date, End Date, Status, Defense Active, Defense Start, Defense End, Updated By and Updated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



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In the **Registrations** tab, users can choose what columns they would like visible at anytime. These options include: Reg Id, Reg Name, DRP ID, UDC ID, LSE ID, SUBLAP, DLAP, DRP SC, Resource Id, Resource Type, Program, Baseline Method, Start Date, End Date, Status, Updated By and Updated Date.



**Note:** The system will display blank under the LSE and DLAP columns for registration with a start date of 11/13/2019 and forward.



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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.

Locations

1 - 25 of 907848

GO

Select Loc ID

Name

SAN

DRP

UDC

LSE

SUBLAP

Device Type

PNODE

Start Date

End Date

Status

Defense Active?

Defense Start

Defense End

DRP VIEW

DRP VIEW > Locations

LOC ID

LOC Name

SAN

DRP

UDC

LSE

SUBLAP

Defense Active

Updated Since DateTime

Apply

Reset

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

Apply

Reset

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

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2.3.1.3 Sorting and Filtering Locations and Registrations

Sorting from ascending to descending by clicking on any of the column headers.

Locations

1 - 25 of 907848

GO

Select Loc ID

Name

SAN

DRP

UDC

LSE

SUBLAP

Device Type

PNODE

Start Date

End Date

Status

Defense Active?

Defense Start

Defense End

Rows 25

Registrations

1 - 25 of 27970

GO


Select Reg ID

Reg Name

Start Date

End Date


Status

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Multiple column headers can be sorted either ascending or descending.

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

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	
Select Reg ID	Name

## 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

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DRP VIEW

> DRP VIEW > Locations

LOC ID  LOC Name  SAN  DRP 

[ALL] ▼

 UDC 

[ALL] ▼

 LSE 

[ALL] ▼

 SUBLAP 

[ALL] ▼

CreateCopyDeleteDefendWithdrawEditEnd DateRegister

Registrations: Create, Edit, Copy, Terminate, Delete

DRP VIEW

> DRP VIEW > Registrations

Reg Id  Reg Name  DRP 

[ALL] ▼


 UDC 

[ALL] ▼

 LSE 

[ALL] ▼

CreateEditCopyTerminateDelete

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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

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**DRP Copy** provides the user the ability to copy a previously created location. The user must first select the location to be copied then the **Copy** button. The copied location information will be 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 [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 907860 GO

Select	L	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	C
<input checked="" type="checkbox"/>	1	LOC_TEST_12_CTRLGP151	SAN_TEST_12_CTRLGP151							06/10/2020	06/30/2020	End Dated	A

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> DRP VIEW > Create New Locations

Create New Location

Name\*

LOC\_TEST\_12\_CTRLGP151

SAN\*

SAN\_TEST\_12\_CTRLGP151

Start Date\*

06/10/2020

End Date\*

06/30/2020

DRP\*

UDC\*

LSE\*

SUBLAP\*

PNODE

Address 1

Address 2

Suite 15G

City\*

Folsom

State\*

California

Zip\*

95687

Address Type

Business

Device Type


Update Fields

Save as Draft

Cancel

Save

Submit

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**DRP DELETE** action is usable when a location has been previously created. **DELETE** is only actionable for certain location statuses.

DRP VIEW

DRP VIEW > Locations

LOC ID  LOC Name  SAN  DRP 

[ALL]

 UDC 

[ALL]

 LSE 

[ALL]

 SUBLAP 

[ALL]

 Defense Active 

[ALL]

 Updated Since DateTime

CreateCopyDeleteDefendWithdrawEditEnd DateRegister


Locations

1 - 25 of 907860

GO

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNOE	Start Date	End Date	Status	Defens Active
<input type="checkbox"/>	11535993000151 LOC_TEST_12_CTRLGP151	SAN_TEST_12_CTRLGP151							06/10/2020	06/30/2020	End Dated	
<input type="checkbox"/>	11535993000150 UD_TEST_12_CTRLGP150	SAN_TEST_12_CTRLGP150							05/20/2020	06/16/2020	End Dated	
<input checked="" type="checkbox"/>	11535993000149 LOC_TEST_12_CTRLGP149	SAN_TEST_12_CTRLGP149							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	11535993000148 UD_TEST_12_EDIT	SAN_TEST_12_CTRLGP148							05/20/2020	12/29/2020	Active	
<input type="checkbox"/>	11535993000147 LOC_TEST_12_CTRLGP147	SAN_TEST_12_CTRLGP147							05/20/2020	06/30/2020	End Dated	
<input type="checkbox"/>	11535993000146 LOC_TEST_12_CTRLGP146	SAN_TEST_12_CTRLGP146							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	11535993000145 LOC_TEST_12_CTRLGP145	SAN_TEST_12_CTRLGP145							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	11535993000144 LOC_TEST_12_CTRLGP144	SAN_TEST_12_CTRLGP144							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	11535993000143 LOC_TEST_12_CTRLGP143	SAN_TEST_12_CTRLGP143							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	11535993000142 LOC_TEST_12_CTRLGP142	SAN_TEST_12_CTRLGP142							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	11535993000141 LOC_TEST_12_CTRLGP141	SAN_TEST_12_CTRLGP141							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	11535993000140 LOC_TEST_12_CTRLGP140	SAN_TEST_12_CTRLGP140							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	11535993000139 LOC_TEST_12_CTRLGP139	SAN_TEST_12_CTRLGP139							05/20/2020	12/30/2021	Active	
<input type="checkbox"/>	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.

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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 active or inactive 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?
<input type="checkbox"/> 11535993000151	LOC_TEST_12_CTRLGP151	SAN_TEST_12_CTRLGP151							06/10/2020	06/30/2020	End Dated	
<input type="checkbox"/> 11535993000150	UD_TEST_12_CTRLGP150	SAN_TEST_12_CTRLGP150							05/20/2020	06/16/2020	End Dated	
<input checked="" type="checkbox"/> 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 either accept or reject the Defend request.



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**DRP Withdraw** action is usable when a location has been previously created and submitted for review but 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 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
								09/01/2016	09/01/2017	Pending

Are you sure you want to Withdraw above Locations?

Cancel

Continue

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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 locations status.

DRP VIEW

DRP VIEW

Locations

LOC ID  LOC Name  SAN  DRP 

[ALL]

 UDC 

[ALL]

 LSE 

[ALL]

 SUBLAP 

[ALL]

 Defense Active 

[ALL]


 Updated Since DateTime

CreateCopyDeleteDefendWithdrawEditCancelRegister

Locations

1 - 25 of 907860

Select	Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defen Activ
<input type="checkbox"/>	11535993000151	LOC_TEST_12_CTRLGP151	SAN_TEST_12_CTRLGP151							06/10/2020	06/30/2020	End Dated	
<input type="checkbox"/>	11535993000150	UD_TEST_12_CTRLGP150	SAN_TEST_12_CTRLGP150							05/20/2020	06/16/2020	End Dated	
<input checked="" type="checkbox"/>	11535993000149	LOC_TEST_12_CTRLGP149	SAN_TEST_12_CTRLGP149							05/20/2020	12/30/2021	Active	

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## DRP VIEW

> DRP VIEW > Edit Location


Edit Location

Gray areas are non-modifiable

LOC ID	11535993000149	PNODE	
SAN*	SAN_TEST_12_CTRLGP149	Address 1*	250 Crop Circle Way
NAME*	LOC_TEST_12_CTRLGP149	Address 2	Suite 15G
Start Date*	05/20/2020	City*	Folsom
End Date*	12/30/2021	State*	California
DRP*		Zip*	95687
UDC*		Address Type	Business
LSE*		Status	Active
SUBLAP*		Device Type	

Cancel

Update

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**DRP End Date** action is actionable only under certain location statuses. NOTE: 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 the end date will correspond with the date that the action was taken. The **DRP** must use the **Edit** action to End Date a location for a different 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
							05/04/2016	06/03/2016	Inactive

Are you sure you want to End Date above Locations?

Cancel
Continue

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2.4.1.2 UDC and LSE Actions

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Locations: Review

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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
11544082

Reg Name

DRP
[ALL]

UDC
[ALL]

LSE
[ALL]

SUBLAP
[ALL]

Updated Since DateTime

Registrations

Reg ID
11544082

Reg Name

DRP
[ALL]

UDC
[ALL]

LSE
[ALL]

SUBLAP
[ALL]

DLAP
DRP
SC

Resource ID

Resource Type
Pre Defined

Program
Reliability DR

Baseline Method
Control Group

Start Date
07/01/2020

End Date
08/01/2020

Status
New

Locations


1
- 25 of 150

GO

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

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## 2.5 Location and Registration Status Lifecycle

DRRS Status	
Location	Registration
<ul style="list-style-type: none"> <li>1. New</li> <li>2. Processing</li> <li>3. Pending</li> <li>4. Inactive</li> <li>5. Active</li> <li>6. Withdrawn</li> <li>7. End-Dated</li> <li>8. Duplicate</li> <li>9. Disputed</li> </ul>	<ul style="list-style-type: none"> <li>1. New</li> <li>2. Pending</li> <li>3. Confirmed</li> <li>4. Terminated</li> </ul>

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.


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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 indicated 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.

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DRRS	Statuses	Description
<b>Registration</b>	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 and validation is in progress.
	Confirmed	Registration will be set to this status when it has been submitted 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.


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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

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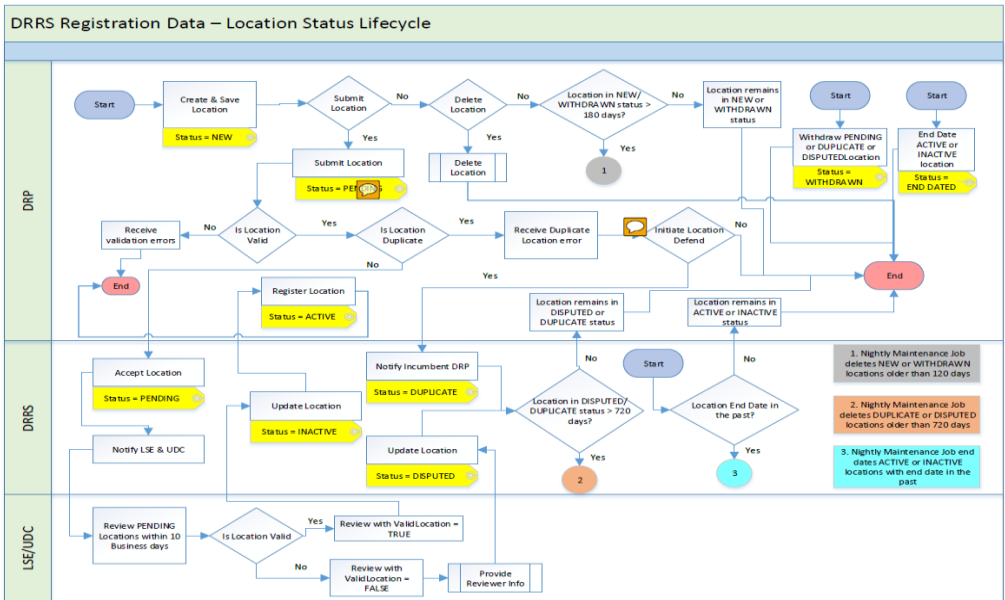
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+Headings (Cambria), Not Bold, Not Italic, Font color: Accent 1

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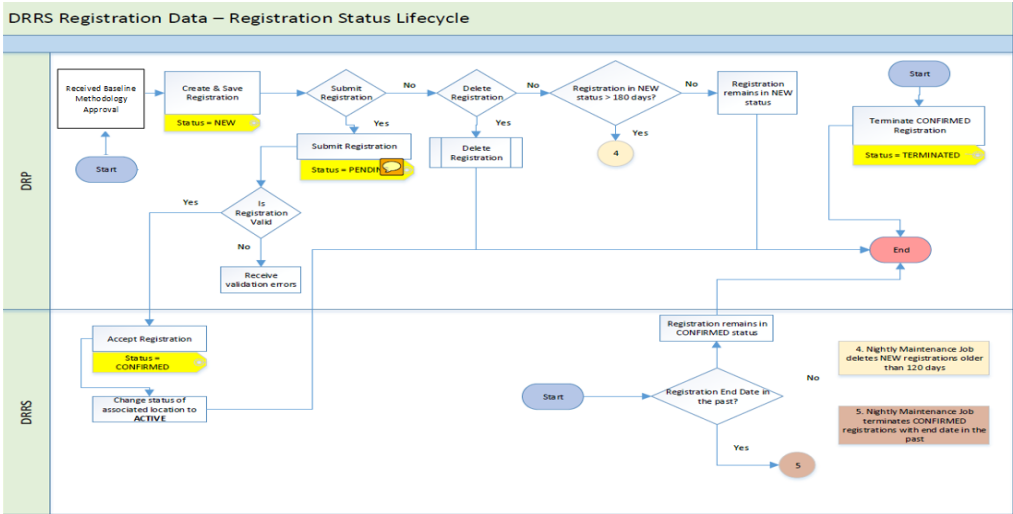
### 2.5.1.1 Location Status Lifecycle Process Flow<sup>1</sup>




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2.5.1.2 Registration Status Lifecycle Process Flow<sup>2</sup>



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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 notified that there is a location ready for review. The UDC and LSE have ~~ten-five (5-10)~~ business days to complete their review and either submit with or without findings. If the ~~ten-five (5-10)~~ business day elapses without a UDC or LSE acting on the review notification, the DRRS will auto approve the location.

### 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.

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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 

[ALL] ▼

 UDC 

[ALL] ▼

 LSE 

[ALL] ▼

 SUBLAP 

[ALL] ▼

 Defense Active 

[ALL] ▼

 Up

Create

Copy

Delete

Defend


Withdraw

Edit

End Date

Register

Locations

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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.


DRP VIEW

> DRP VIEW > Create New Locations

Create New Location

Name*	<input type="text"/>	Address 1*	<input type="text"/>
SAN*	<input type="text"/>	Address 2	<input type="text"/>
Start Date*	<input type="text"/>	City*	<input type="text"/>
End Date*	<input type="text"/>	State*	California
DRP*	<input type="text"/>	Zip*	<input type="text"/>
UDC*	<input type="text"/>	Address Type	<input type="text"/>
LSE*	<input type="text"/>	Device Type	<input type="text"/>
SUBLAP*	<input type="text"/>		
PNODE	<input type="text"/>		

Cancel Save Submit

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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\*

Zip\*

Address Type

Device Type

California

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

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

**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. 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



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

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

Start Date	End Date	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>
06/22/2020	12/30/2020	New
06/22/2020	12/30/2020	New


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

Start Date	End Date	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>
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.

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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: [ ] 1 - 25 of 68 GO

Select Loc ID	LOC Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	De Ac
<input checked="" type="checkbox"/>	11542454 UD_LOC_SAVE_NULL101	SAN_LOC_SAVE_NULL101							06/22/2020	12/30/2020	New	<input checked="" type="checkbox"/>
<input type="checkbox"/>	11542453 UD_LOC_SAVE_EVSE1	SAN_LOC_SAVE_EVSE1					EVSE		06/22/2020	12/30/2020	New	<input type="checkbox"/>

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.

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> DRP VIEW > Edit Location

Edit Location

LOC ID	11542454	PNODE	
SAN*	SAN_LOC_SAVE_NULL101	Address 1*	Work1
NAME*	UD_LOC_SAVE_NULL101	Address 2	Work2
Start Date	06/22/2020	City*	Folsom
End Date*	12/30/2020	State*	California
DRP*		Zip*	98600
UDC*		Address Type	Work
LSE*		Status	New
SUBLAP*		Device Type	ES EVSE

Cancel Update Submit

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

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> DRP VIEW > Edit Location


Edit Location

LOC ID	11542454	PNODE	
SAN*	SAN_LOC_SAVE_NULL101	Address 1*	Work1
NAME*	UD_LOC_SAVE_NULL101	Address 2	Work2
Start Date*	07/02/2020	City*	Folsom
End Date*	12/30/2020	State*	California
DRP*		Zip*	98600
UDC*		Address Type	Work
LSE*		Status	New
SUBLAP*	SLAP_SCEC	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.

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> 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

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

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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** locations 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?

Cancel
Continue

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## Inactive Location

An **Inactive** Location has successfully completed the LSE and UDC review process, but is not part of a registration that is in Pending or Confirmed status. Editing to **Inactive** locations is limited to the location name, start date, end date and address fields. All other fields (fields in gray) will be unavailable for modification and update.

DRP VIEW
Edit Location

Edit Location

LOC ID
11535793000028

SAN\*
SAN\_TEST\_SCE\_2REG28

NAME\*
LOC\_TEST\_SCE\_2REG28

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
Inactive

Device Type

Cancel
Update

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## Active Location

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



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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. The Location end date can only be contracted until the end date of the registration. System will allow user to edit Location within the Registration start and end date if the Registration start date is in the future. If the Location that are 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, and the Locations’ status will be changed from “Active” to “Inactive”.

#### Example 1.

- User end-date a location with an “Active” status.
- Location End-Date 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.

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

Rows

249719

REG-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?

Rows

249716

LOC16-test

11/15/2019

12/31/2029

View Location


249718

LOC18-test

11/01/2019

12/31/2029

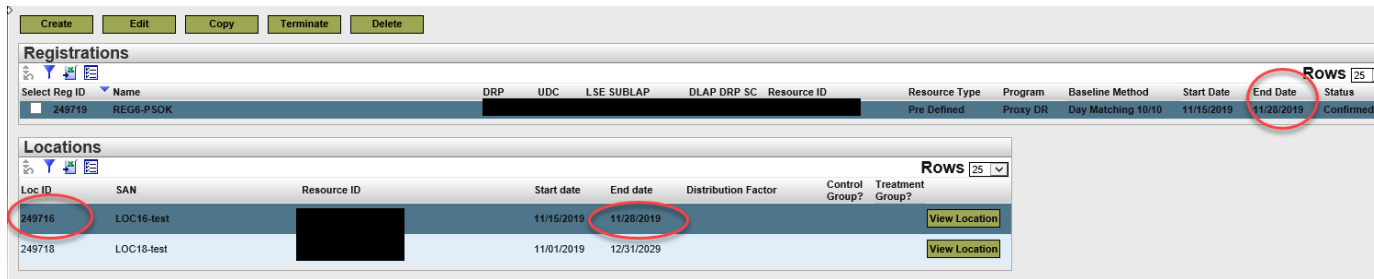
View Location

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

The system update the Registration End Date from 11/30/2021 to 11/28/2019 status is still in "Confirmed".




The screenshot displays two tables from the California ISO Demand Response Registration system. The 'Registrations' table has columns: Select Reg ID, Name, DRP, UDC, LSE, SUBLAP, DLAP, DRP, SC, Resource ID, Resource Type, Program, Baseline Method, Start Date, End Date, and Status. A record for REG ID 249719 is shown with a status of 'Confirmed' and an end date of 11/28/2019. The 'Locations' table has columns: Loc ID, SAN, Resource ID, Start date, End date, Distribution Factor, Control Group?, and Treatment Group?. A record for LOC ID 249716 is shown with an end date of 11/28/2019. Both end dates are circled in red.

- On 11/29/2019, after the Registration expired. 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".

### Example 2.

- User end-dating a location with an "Active" status.
- Location End-Date is in the future and earlier than the Registration period.

- REG ID#249719 Resource ID = RESA registration is for 11/15/2019 through 11/30/2021.
- The user end the LOCATION\_ID = 123 to 11/14/2019, since the location end date is earlier than the corresponding Registration; this will cause the Registration effective (in the future) to be deleted.

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2.

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 <b>12/30/2029 to 11/14/2019</b> ; which caused the Registration effective (in the future) <b>11/15/2019</b> to be deleted.


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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

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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

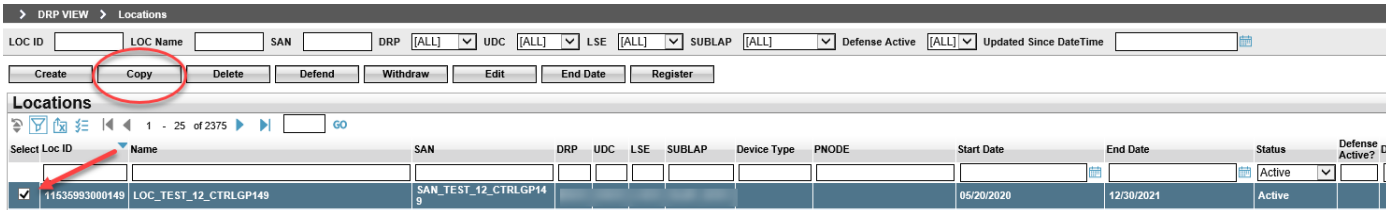
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No changes are permitted for an End-Dated Location. Submissions to Edit an End-Date Location will be rejected. End-dated locations are logically equivalent to deleted records


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.



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

- 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.

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> 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

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### 3.1.3 Delete

The **Delete** feature allows the DRP to delete a new location. Locations can only be deleted when they are in the New status. To **Delete** a location, the 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:

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

DRP VIEW > Confirm Delete Locations

Locations To Be Deleted

1 - 1 of 1


Rows: 25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Location Status
11542454	UD_LOC_SAVE_NULL101	SAN_LOC_SAVE_NULL101							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.

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### 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.

DRP VIEW
Defend Location


Initiate Defend

LOC ID
Name\*
SAN\*
Start Date\*
End Date\*
DRP\*
UDC\*
LSE\*
SUBLAP\*
PNODE

Address 1
Address 2
City
State\*
Zip\*
Address Type
Device Type

Requester Name\*
Phone\* (Format: xxx-xxx-xxxx)
Comments\*

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

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### 3.1.5 Defend

The **Defend** feature allows the DRP to defend a location that has been found to be a duplicate of another location in the inactive or active status having the same SAN, UDC and 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.



Mon 9/30/2019 1:57 AM

no-reply@caiso.com

Location Defend initiated - Production


To ☐ [Redacted]

Cc ☐ PDR

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
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]




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#### [Prospective DRP action:](#)

The prospective DRP must include a contact name, number and comment if they chose to enter the defend process by selecting the **Continue** button. Locations submitted into the defense process will set to a duplicate status.

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DRP VIEW

DRP VIEWDefend Location

Location ID nullApplyReset

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?

CancelContinue

Incumbent DRP action:

The incumbent DRP must accept or reject the prospective’s location claim request via the Defend process on the UI.

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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. See the figure below.

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

**Locations**


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

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE	Start Date	End Date	Status	Defense Active?	Defense Start	Defense End
<input type="checkbox"/> 142682	LOC2-psok	LOC2-psok						10/25/2019	10/31/2020	Inactive	Y	10/25/2019	11/08/2019

Rows: 25

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


The status of Defense Active = 'Y', and the Defense Start, and Defense End will disappear after the incumbent DRP respond to the prospective DRP.

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While the defend process is in progress, the incumbent DRP must accept/reject through the defend process. Do not alter the registration and location outside of the defend process; doing so will result in overlapping record. To defend, 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.

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DRP VIEW

UDC VIEW

LSE VIEW

ADMINISTRATION

DRP VIEW

Defend Locations

Selected Locations

1

-

1

of

1

1

2

3

4

UDC

1

1

2

Rows

25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE	Start Date	End Date	Location Status
249717	LOC17-psok	LOC17-test						11/01/2019	12/31/2029	Active

Valid Location

☐

Reviewer Name\*

pia

Phone\* (Format: xxx-xxx-xxxx)


000-000-0000

Review Comment

Incumbent DRP acc...

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

Are you sure you want to Submit Defend Request for above Locations?

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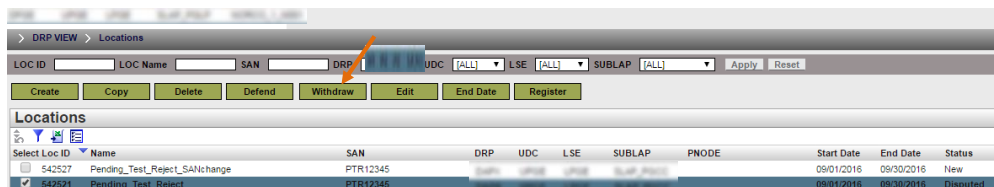
If the incumbent DRP takes no action within 10 business days, the system will automatically end date the location and its corresponding registration after the 10 business days. In addition, the system will automatically adjust the end date out by 5 business days for the location that is in defense process and its corresponding registration. Note that the status for the location 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 DRP defends the location during the defense period, the prospective 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.



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

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DRP VIEW | UDC VIEW | LSE VIEW | ADMINISTRATION


DRP VIEW Confirm Withdraw Locations

**Locations To Be Withdrawn**

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE	Start Date	End Date	Location Status
542714	Test_duplicate_SAN	PTR12345						8/08/2016	10/10/2016	Duplicate

Are you sure you want to Withdraw above Locations?

Cancel Continue

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3.1.7 End Date

The **End Date** feature allows the DRP to end date a location. Locations can only be end dated when they are in the “Inactive”, “Active”, “Duplicate”, or “Disputed” statuses. To **End Date** a location, the location is first selected then the **End Date** button chosen 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
<input type="checkbox"/> 542527	Pending_Test_Reject_SANchange	PTR12345						09/01/2016	09/30/2016	New
<input checked="" type="checkbox"/> 542521	Pending_Test_Reject	PTR12345						09/01/2016	09/30/2016	Disputed



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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.

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
542527	Test_duplicate_SAN	PTR12345								Inactive

Are you sure you want to End Date above Locations?

Cancel

Continue

3.2 Location Review

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### 3.2.1 LSE Review

After logging into the DRRS, the LSE is provided 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.<sup>3</sup> In addition the following is provided in this view:

<b>Location ID</b>	A unique ID assigned by the DRRS for all new locations when they are saved or submitted.
<b>Status</b>	The Current status of the location.
<b>Review Start</b>	The date on which the location was submitted for review. This date begins the <del>ten-five</del> business day (405) review period for the LSE to review and respond before the DRRS auto approves the location.
<b>Review End</b>	The date on which the review period ends or date on which the review was completed.
<b>LSE Review</b>	A "Y" indicates that a valid location review has been completed.
<b>Reviewer Name</b>	The name of the reviewer provided as part of validation
<b>Reviewer Contact</b>	Phone number of the reviewer provided as part of validation.

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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 the **Review** button to enter the review confirmation process screen.

<sup>3</sup> See Location Management > Create section for all location information provided by the DRP.

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

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																																																												
<div> <div>1 - 3 of 3</div> <div>GO</div> <div>Rows 25</div> </div> <table border="1"> <thead> <tr> <th>ID</th> <th>Name</th> <th>SAN</th> <th>DRP</th> <th>UDC</th> <th>LSE</th> <th>SUBLAP</th> <th>DEVICE TYPE</th> <th>PNODE</th> <th>Start Date</th> <th>End Date</th> <th>Location Status</th> </tr> </thead> <tbody> <tr> <td>11544237</td> <td>CIDI 213762 Case 2 - Prospective</td> <td>GK_SAN_07012002</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>07/11/2020</td> <td>07/24/2020</td> <td>Pending</td> </tr> <tr> <td>11544081</td> <td>GK Loc for CIDI 213762 Case 1 - Prospective</td> <td>GK_SAN_07012001</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>07/10/2020</td> <td>07/21/2020</td> <td>Pending</td> </tr> <tr> <td>11544016</td> <td>LOC_TEST_to defend</td> <td>SAN_TEST_ST12_CTRLGP1</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>07/09/2020</td> <td>12/31/2021</td> <td>Pending</td> </tr> </tbody> </table>													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
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																																																	
<div> <div>Valid Location <input checked="" type="checkbox"/></div> <div> <div>Reviewer Name*</div> <div>Reviewer Name Here</div> </div> <div> <div>Phone* (Format: xxx-xxx-xxxx)</div> <div>916-123-4567</div> </div> <div> <div>Review Comment</div> <div>Review Comment Here</div> </div> </div>																																																												
<div> <div>Are you sure you want to Submit the Review for above Locations?</div> <div> <div>Cancel</div> <div>Continue</div> </div> </div>																																																												

Check the box to approve

Reviewer Name and Phone number is required

Hit "Continue" to submit

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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 not passed the review.

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 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.<sup>4</sup> In addition the following is provided in this view:

<sup>4</sup> See Location Management > Create section for all location information provided by the DRP.

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<b>Location ID</b>	A unique ID assigned by the DRRS for all new locations when they are saved or submitted.
<b>Status</b>	The Current status of the location.
<b>Review Start</b>	The date on which the location was submitted for review. This date begins the <del>ten-five</del> business day (540) review period for the UDC to review and respond before the DRRS auto approves the location.
<b>Review End</b>	The date on which the review period ends or date on which the review was completed.
<b>LSE Review</b>	A "Y" indicates that a valid location review has been completed.
<b>Reviewer Name</b>	The name of the reviewer provided as part of validation.
<b>Reviewer Contact</b>	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 the **Review** button to enter the review confirmation process screen.

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

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UDC 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:  Select the location(s)

		SAN	DRP	UDC	LSE	SUBLAP	DEVICE TYPE	PNODE	Start Date	End Date	Review Start	Review End	Status
<input checked="" type="checkbox"/>	11544237 CIDI 213762 Case 2 - Prospective	GK_SAN_07012002							07/11/2020	07/24/2020	07/01/2020	07/06/2020	Pending
<input type="checkbox"/>	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
<input type="checkbox"/>		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.

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> UDC VIEW > Confirm Review Locations

**Locations To Be Reviewed**

1 - 2 of 2  GO Rows 25

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	DEVICE TYPE	PNODE	Start Date	End Date	Location Status
44544237	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 ☐ Check this box to approve

Reviewer Name\*

Phone\* (Format: xxx-xxx-xxxx)

Review Comment

Reviewer Name and Phone number is required


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

Cancel Continue

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 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)

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- 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**

### 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 provided comments 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.



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DRP VIEW > Locations

LOC ID: [ ] LOC Name: [ ] SAN: [ ] DRP: [ALL] UDC: [ALL] LSE: [ALL] SUBLAP: [ALL] Defense Active: [ALL] Updated Since Date/Time: [ ] [Apply] [Reset]

Create Copy Delete Defend Withdraw Edit End Date Register

**Locations**

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

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

**Location Address**

Address 1

City	State	Zip	Type
MONTCLAIR	CA	94763-1630	Test address

UDC/LSE Reviewer Contact and Comments

**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
[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

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 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.

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DRP VIEW > Locations

LOC ID: [ ] LOC Name: [ ] SAN: [ ] DRP: [ALL] UDC: [ALL] LSE: [ALL] SUBLAP: [ALL] Defense Active: [ALL] Updated Since Date/Time: [ ] [Apply] [Reset]

Create [Copy] Delete Defend Withdraw Edit End Date Register

**Locations**

Select Loc ID: [ ] 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
<input checked="" type="checkbox"/>	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	01/27/2019	01/27/2029	Duplicate	<input type="checkbox"/>	[ ]	[ ]
<input type="checkbox"/>	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	01/27/2019	01/27/2029	Duplicate	<input type="checkbox"/>	[ ]	[ ]
<input type="checkbox"/>	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	01/25/2019	01/25/2029	Duplicate	<input type="checkbox"/>	[ ]	[ ]

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]


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If the DRP believe 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 information through the review process needed to make direct contact with LSE or UDC to initiate resolution.

### 3.2.4 LSE/UDC Review notification

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

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 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

### 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


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- 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>.

### 3.3 Creating a Registration

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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 the inactive, and active statuses. Registration can be in multiple 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 locations



- 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](#).

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- Click on the **Register** button

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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

1 - 25 of 662968

GO

Select Loc ID	Name	SAN	DRP	UDC	LSE	SUBLAP	Device Type	PNODE	Start Date	End Date	Status	Defense Active?
<input checked="" type="checkbox"/>	LOC_TEST_2REG28	SAN_TEST_2REG28							05/20/2020	12/30/2021	Inactive	<input type="checkbox"/>
<input checked="" type="checkbox"/>	LOC_TEST_2REG26	SAN_TEST_2REG26							05/20/2020	12/30/2021	Inactive	<input type="checkbox"/>
<input checked="" type="checkbox"/>	LOC_TEST_2REG23	SAN_TEST_2REG23							05/20/2020	12/30/2021	Inactive	<input type="checkbox"/>
<input checked="" type="checkbox"/>	LOC_TEST_2REG21	SAN_TEST_2REG21							05/20/2020	12/30/2021	Inactive	<input type="checkbox"/>


- On the **Registration** screen, input the data and save/submit.

The following is a description of the fields requested 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
- Start Date**<sup>5</sup> 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 End Date cannot be a prior date or overlap with an existing Active location with same SAN and UDC assignment
- DRP**<sup>6</sup> Demand Response Provider ID

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


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

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- **UDC** Utility Distribution Company ID
- **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. Please see 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 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.



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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

#### 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 [pdr@caiso.com](mailto: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.

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Commented [CE1]: Add a business rule regarding the Curtailment resource applies to a PDR-LSR baseline registration...

Commented [SP2R1]: Please see Appendix D

#### 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 Registration information provided including Resource IDs previously assigned to the DRP and unassigned Pre Defined resource IDs for the identified SubLAP.

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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 AppendixD for business rules and tips.

- **Show/Refresh Available Location**

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

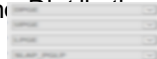
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### Distribution Factors for Custom Resource

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 of load reduction



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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](mailto:RDT@caiso.com) when submitting the GRDT form.

### Selected Locations

ID	NAME	SAN	Start Date	End Date	PNODE	Control Group	Treatment Group
569528	psokREG-201	psokREG-201	10/09/2018	12/30/2018	PSOKREG-201		
569527	psokREG-200	psokREG-200	10/09/2018	12/30/2018	PSOKREG-200		


### Distribution Factor

PNODE	Distribution Factor (2 decimal places allowed)
PSOKREG-201	0.35
PSOKREG-200	0.65

Edit button used to assign or edit identified PNodes Distribution Factors

Distribution Factors to 2 decimal places and total = 1.00. Update before saving or submitting.

o Save and Submit.

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Save and Submit.

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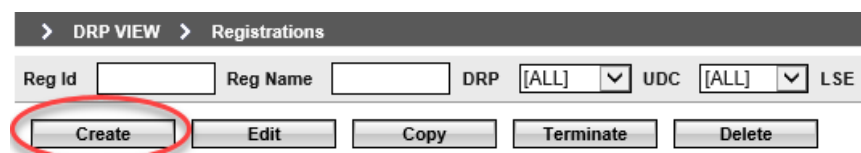
Creating Registration using the Control Group baseline method, please see [Appendix F](#).

- Approach 2:

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





A screenshot of the 'DRP VIEW > Registrations' form. The 'Create' button is highlighted with a red circle. The form includes input fields for 'Reg Id', 'Reg Name', and 'LSE', and dropdown menus for 'DRP' and 'UDC'. Below the input fields are buttons for 'Create', 'Edit', 'Copy', 'Terminate', and 'Delete'.

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- Input registration data.

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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

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

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

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


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- **Start Date<sup>7</sup>** 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 End Date cannot be a prior date or overlap with an existing Active location with same SAN and UDC assignment
- **DRP<sup>8</sup>** 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.
- **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**

<sup>7</sup> The system validates effective dates input for the Registration against Location effective dates to determine available Locations that can be registered

<sup>8</sup> The system uses DRP, UDC, LSE and SubLAP information provided to ensure Locations presented as available have the same designations.

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- 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

- **Requesting a Custom Resource ID with Dynamic GDF**



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➤ 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 [hdr@caiso.com](mailto:hdr@caiso.com) with the following information: Location of bus, and total MW. The custom GDF can be deployed based on the Master File deployment.

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## • Resource

- When Resource Type = Pre Defined or Custom
  - The drop-down list will show available resources that can be selected based on 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.

Note: If no available resource appear in the drop-down list, submit a request to [hdr@caiso.com](mailto:hdr@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

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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 location, 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**.

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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,

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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.

### 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.

Note: If modifying the End Date, utilize the “**Terminate**” function 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.

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 Reg ID Name DRP UDC LSE SUBLAP DLAP DRP SC Resource ID Resource Type

<input type="checkbox"/>	11544235	Reg Test Count150 v2									
--------------------------	----------	----------------------	--	--	--	--	--	--	--	--	--

A Registration Status will affect how it can be edited.

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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

DRP2

ed

PDRP10

Baseline Method\*
Control Group

Status
Confirmed


Cancel

Update

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

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

- Cancel** - Cancels Edit of the Registration.
- Update** - Updates the Registration maintaining its Registration ID.

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## 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.

### 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	Name	DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource
<input checked="" type="checkbox"/>								

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.

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### 4.1.3 Terminate

The **Terminate** feature allows the DRP to end-date a Registration. Registrations can only be end-dated when they are in the Confirmed status. The system will determine the proper end date of the registration based on the 5 business days from the current date. To **Terminate**, the Registration is first selected then the **Terminate** button chosen under the Registration View.

DRP VIEW
Registrations

Reg ID
Reg Name
DRP
[ALL]
UDC
[ALL]
LSE
[ALL]
SUBLAP
[ALL]
Updated Since DateTime

Create
Edit
Copy
Terminate
Delete

1
25
of 27983
GO


Select	Reg ID	Name	DRP	UDC	LSE	SUBLAP	DLAP	DRP SC	Resource ID	Resource Type	Program	Baseline Method	Start Date	End Date	Status
<input checked="" type="checkbox"/>	1544235	Reg Test Count150 v2								Pre Defined	Proxy DR	Day Matching 10/10	06/05/2019	11/07/2019	Confirmed









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A deleted Registration and its created Registration ID will no longer exist in the Registrations View.

## 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.


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## 5 Helpful Links

Document	Link
Application Access Request Form reference Guide	<a href="http://www.caiso.com/Documents/ApplicationAccessRequestFormReferenceGuide.pdf">http://www.caiso.com/Documents/ApplicationAccessRequestFormReferenceGuide.pdf</a>
Access and Identity Management (AIM) User Guide	<a href="http://www.caiso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf">http://www.caiso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf</a>
Energy Storage and Distributed Energy Resources 3B External Training Presentation	<a href="http://www.caiso.com/Documents/EnergyStorage_DistributedEnergyResources_Phase3B.pdf">http://www.caiso.com/Documents/EnergyStorage_DistributedEnergyResources_Phase3B.pdf</a>
Demand Response and Proxy Demand Resources FAQ	<a href="http://www.caiso.com/Documents/DemandResponseandProxyDemandResponseFAQversion5.xls">http://www.caiso.com/Documents/DemandResponseandProxyDemandResponseFAQversion5.xls</a>
Demand Response Provider Agreement Information Request Sheet	<a href="http://www.caiso.com/Documents/DemandResponseProviderAgreementInformationRequestSheet.doc">http://www.caiso.com/Documents/DemandResponseProviderAgreementInformationRequestSheet.doc</a>


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Document	Link
<b>Direct Telemetry BPM</b>	<a href="http://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Direct Telemetry">http://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Direct Telemetry</a>
<b>External User Application Access request Form</b>	<a href="http://www.caiso.com/Documents/UserApplicationAccessRequestForm.xls">http://www.caiso.com/Documents/UserApplicationAccessRequestForm.xls</a>
<b>ISO Connected Entity Service Guide</b>	<a href="http://www.caiso.com/Documents/ISOConnectedEntityServiceGuide.pdf">http://www.caiso.com/Documents/ISOConnectedEntityServiceGuide.pdf</a>
<b>List of certified SC's</b>	<a href="http://www.caiso.com/Documents/List-SchedulingCoordinators_CRRHoldersandConvergenceBiddingEntities.pdf">http://www.caiso.com/Documents/List-SchedulingCoordinators_CRRHoldersandConvergenceBiddingEntities.pdf</a>
<b>List of Demand Response Participants</b>	<a href="http://www.caiso.com/Documents/ListofDemandResponseParticipants.pdf">http://www.caiso.com/Documents/ListofDemandResponseParticipants.pdf</a>
<b>Load and Demand Response Page</b>	<a href="http://www.caiso.com/participate/Pages/Load/Default.aspx">http://www.caiso.com/participate/Pages/Load/Default.aspx</a>


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Document	Link
<b>Load Serving Entity Request (LSE ID) Form</b>	<a href="http://www.caiso.com/Documents/LoadServingEntityIDRequestForm.doc">http://www.caiso.com/Documents/LoadServingEntityIDRequestForm.doc</a>
<b>Meter Service Agreement ISO Metered Entities Information Request Sheet</b>	<a href="http://www.caiso.com/Documents/MeterServiceAgreement_ISO Metered Entities Information Request Sheet.doc">http://www.caiso.com/Documents/MeterServiceAgreement_ISO Metered Entities Information Request Sheet.doc</a>
<b>Meter Service Agreement Scheduling Coordinators Information Request Sheet</b>	<a href="http://www.caiso.com/Documents/MeterServiceAgreement_Scheduling Coordinators Information Request Sheet.doc">http://www.caiso.com/Documents/MeterServiceAgreement_Scheduling Coordinators Information Request Sheet.doc</a>
<b>Metering BPM</b>	<a href="http://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Metering">http://bpmcm.caiso.com/Pages/BPMDetails.aspx?BPM=Metering</a>
<b>New Resource Implementation Checklist</b>	<a href="http://www.caiso.com/Documents/NewResourceImplementationChecklist.xlsx">http://www.caiso.com/Documents/NewResourceImplementationChecklist.xlsx</a> <a href="http://www.caiso.com/Documents/NewResourceImplementationChecklist.xls">http://www.caiso.com/Documents/NewResourceImplementationChecklist.xls</a>
<b>Requirements for becoming and Scheduling Coordinator</b>	<a href="http://www.caiso.com/participate/Pages/SchedulingCoordinator/Default.aspx">http://www.caiso.com/participate/Pages/SchedulingCoordinator/Default.aspx</a>


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Document	Link
Reliability Demand Response Resource Training Requirements for becoming and Scheduling Coordinator	<a href="http://www.caiso.com/Documents/ReliabilityDemandResponseResourceOverview.pdf">http://www.caiso.com/Documents/ReliabilityDemandResponseResourceOverview.pdf</a>
Energy Storage Distributed Energy Resources customer partnership group meeting artifacts including presentation	<a href="http://www.caiso.com/Documents/Presentation-EnergyStorage-DistributedEnergyResourcesPhases2-3-ImplementationCustomerPartnershipGroup-May6-2019.pdf">http://www.caiso.com/Documents/Presentation-EnergyStorage-DistributedEnergyResourcesPhases2-3-ImplementationCustomerPartnershipGroup-May6-2019.pdf</a>
Energy Storage Distributed Energy Resources – Phase 3 -Business Requirements	<a href="http://www.caiso.com/Documents/BusinessRequirementsSpecificationClean-EnergyStorageandDistributedEnergyResourcesPhase3.pdf">http://www.caiso.com/Documents/BusinessRequirementsSpecificationClean-EnergyStorageandDistributedEnergyResourcesPhase3.pdf</a>
DRRS Enhancement -Demand Response Location Registration Enhancement – Technical Specifications	<a href="http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx">http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx</a> <a href="http://www.caiso.com/Documents/DemandResponseLocationRegistrationEnhancement-TechnicalSpecificationsv4REDLINED.pdf">http://www.caiso.com/Documents/DemandResponseLocationRegistrationEnhancement-TechnicalSpecificationsv4REDLINED.pdf</a>
DRRS Enhancement -Summary of Use Case for Demand Response Solutions Registrations	<a href="http://www.caiso.com/Documents/SummaryofUseCaseforDemandResponseSolutions-Registrations.pdf">http://www.caiso.com/Documents/SummaryofUseCaseforDemandResponseSolutions-Registrations.pdf</a>
DRRS Enhancement -Location and Registration Life Cycle	<a href="http://www.caiso.com/Documents/LocationandRegistrationLifecycle.pdf">http://www.caiso.com/Documents/LocationandRegistrationLifecycle.pdf</a>

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Document	Link
<b>DRRS Enhancement -Summary of Use Case for Demand Response Solutions Locations</b>	<a href="http://www.caiso.com/Documents/SummaryofUseCaseforDemandResponseSolutions-Locations.pdf">http://www.caiso.com/Documents/SummaryofUseCaseforDemandResponseSolutions-Locations.pdf</a>
<b>Example – Day Match Workbook</b>	<a href="http://www.caiso.com/Documents/Example-DayMatchWorkbook.xlsx">http://www.caiso.com/Documents/Example-DayMatchWorkbook.xlsx</a>
<b>Example – Day Randomization Validation</b>	<a href="http://www.caiso.com/Documents/Example-RandomizationValidationTemplate.xlsx">http://www.caiso.com/Documents/Example-RandomizationValidationTemplate.xlsx</a>
<b>Example – Weather Match Workbook</b>	<a href="http://www.caiso.com/Documents/Example-WeatherMatchWorkbook.xlsx">http://www.caiso.com/Documents/Example-WeatherMatchWorkbook.xlsx</a>
<b>GRDT and IRDT Definitions</b>	<a href="http://www.caiso.com/Documents/GRDTandIRDTDefinitions.xls">http://www.caiso.com/Documents/GRDTandIRDTDefinitions.xls</a>
<b>Generator Resource Data Template (GRDT)</b>	<a href="http://www.caiso.com/Documents/GeneratorResourceDataTemplate_ForNewDemandResponse.xlsx">http://www.caiso.com/Documents/GeneratorResourceDataTemplate_ForNewDemandResponse.xlsx</a>

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Document	Link
Full Network Model Pricing Node	<a href="http://www.caiso.com/Documents/FullNetworkModel_PricingNodeMapping_Based_FullNetworkModel_ReleaseDB2019Q2.xls">http://www.caiso.com/Documents/FullNetworkModel_PricingNodeMapping_Based_FullNetworkModel_ReleaseDB2019Q2.xls</a>

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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	<p>Added the following info to the LSE and UDC Commenting on a Registration sections</p> <p>Note: The Comments box is limited to <u>255</u> characters. If the LSE review generates comments larger than 255 characters.</p> <p>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.</p> <p>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.</p> <p>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.</p>


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Date	Version	Updated By	Description
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).
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. <a href="http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=6A0B3CBD-4EE0-4BCD-B44F-CBB9E711D31F">http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=6A0B3CBD-4EE0-4BCD-B44F-CBB9E711D31F</a>
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.


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Date	Version	Updated By	Description
12/06/16	4.1	Monica M.	Updated the section on “Generation Resource Data Template Submission and Processing”. Going forward, all GRDT’s shall be submitted to <a href="mailto:RDT@caiso.com">RDT@caiso.com</a> and no longer to <a href="mailto:pdr@caiso.com">pdr@caiso.com</a> .
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.


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Date	Version	Updated By	Description
8/22/19	4.6a	Pia S.	Removed notes in section 3.3
11/7/19	4.7	Pia	Updated sections: - Title of the User Guide from Demand Response to Demand Response <b>Registration</b> 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.
<u>11/1/2024</u>	<u>5.0</u>	<u>Hewayda Ahmed</u>	<u>Updates to 1.5 Automated Email Notification;</u> <u>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>

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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 " <b>Duplicate</b> " 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".

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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 <b>"Defend"</b> . 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 <b>"Duplicate"</b> to <b>"Pending"</b> for LSE and UDC approval.
	7) The Prospective DRP's Location status changes to <b>"Inactive"</b> 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 <b>"Duplicate"</b> status as the Incumbent DRP still owns the Location in an <b>"Active"</b> or <b>"Inactive"</b> status.
	6) The Incumbent DRP rejects the Prospective's claim through the UI. a. On the Locations screen, select the location in defense process and click <b>"Defend"</b> .

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LOC ID

LOC Name

SAN

DRP

UDC

LSE

SUBLAP

Defense Active

Apply

Reset

Create

Copy

Delete

Defend

Withdraw

Edit

End Date

Register

Locations

Select Loc ID

Name

SAN

DRP

UDC

LSE

SUBLAP

PNODE

Start Date

End Date

Status

Defense Active?

Defense Start

Defense End

142682

LOC2-psok

LOC2-psok

10/25/2019

10/31/2020

Inactive

Y

10/25/2019

11/08/2019

142682


LOC2-psok

Valid Location

Review Name, Phone number, and Comments

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

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

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DRP VIEW | UDC VIEW | LSE VIEW | ADMINISTRATION

**Locations**

Registrations **End Locations**

### Select Locations

ID	Name	SAN	DRP	UDC	LSE	SUBLAP	PNODE Start Date	End Date	Location Status
142682	LOC2-psok	LOC2-psok	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/25/2019	10/31/2020	Inactive

Valid Location ☒


Reviewer Name\* [REDACTED]

Phone\* (Format: xxx-xxx-xxxx) [REDACTED]

Review Comment [Rejecting Prospective DRP claim.]

**Are you sure you want to Submit Defend Request for above Locations?**




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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.												
	<div><div>Location Defend Details - Incumbent</div><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></div>	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 <b>no action</b> , 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.												

\* The email notification from DRRS will be sent out the following day, and to only 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.


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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

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SAN		No
DRP		Yes
UDC		Yes
SUBLAP		Yes
PNODE		Yes
Device Type		Yes
<b>Pending</b>		
Cannot be edited. The Pending Location(s) only allows for end dating.		
<b>Duplicate</b>		
Cannot be edited. The Duplicate Location(s) only allows for end dating.		
<b>Inactive</b>		
<b>Fields</b>	<b>Validation Rules</b>	<b>Editable (Yes/No)</b>
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

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State		Yes																					
Zip		Yes																					
LOC ID		No																					
SAN		No																					
DRP		No																					
UDC		No																					
SUBLAP		No																					
PNODE		No																					
Device Type		No																					
<b>Active</b>																							
<table> <tr> <th>Fields</th><th>Validation Rules</th><th>Editable (Yes/No)</th></tr> <tr> <td>Name</td><td></td><td>Yes</td></tr> <tr> <td>Start Date</td><td></td><td>No</td></tr> <tr> <td>End Date</td><td>IF Update &lt; Existing/Recorded</td><td>THEN Yes ELSE No</td></tr> <tr> <td>Address</td><td></td><td>Yes</td></tr> <tr> <td>City</td><td></td><td>Yes</td></tr> <tr> <td>State</td><td></td><td>Yes</td></tr> </table>			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
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																					


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

~~Appendix C - Customer Market Results Interface (CMRI)~~

~~Viewing Total Expected Energy (TEE)~~

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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 Post Details

Non-Dispatchable Time Ranges

Resource Level Movement

Regulation Pay for Performance

CRR Revenue Adjustments


CRR Revenue Adjustments Details

Filter

ApplyReset

[ALL]


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

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

ApplyReset

[ALL]

Start Hour	Interval	Energy Type	Real-Time Market Type	Expected Energy [MWH]
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Day-Ahead
Real-Time
Post-Market
Default Bids
Convergence Bidding
Forecast
Reference
LSE
Energy Imbalance Market
Phase Shifter
Gas Bun

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

Apply
Reset

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

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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	<ul style="list-style-type: none"><li>For all PDR-LSR Baseline Methods:<ul style="list-style-type: none"><li>➤ PDR-LSR</li><li>➤ PDR-LSR+Day Matching 5/10</li><li>➤ PDR-LSR+Day Matching 10/10</li><li>➤ PDR-LSR+Weather Matching</li><li>➤ PDR-LSR+Day Matching Combined</li></ul></li></ul> <p>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:</p> <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> <p>For Master File, the GRDT must include 2 resource IDs, Curtailment and Consumption resource IDs.</p> <p><u>An example of the a pre-defined PDR-LSR resource ID for Master File submittal:</u></p> <p>ABCD_1_PDRPCUR001 ABCD_1_PDRPCON001</p>		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								

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			<ul style="list-style-type: none"> <li>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.</li> <li>Control Group must have at least 150 control group locations and 1 treatment group location.</li> </ul>
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	<ul style="list-style-type: none"> <li>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.</li> <li>Control Group must have at least 150 control group locations and 1 treatment group location.</li> </ul>

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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


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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

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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*

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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.

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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.

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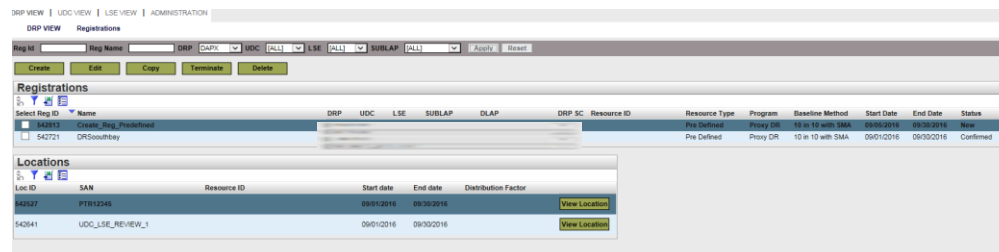
Note: DRRS limits 200 locations per registration unless this is loaded using the API.

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**.



The screenshot shows the DRRS web application interface. At the top, there are navigation tabs: DRP VIEW, UDC VIEW, LSE VIEW, and ADMINISTRATION. Below these, there's a 'Registrations' section with a table. The table has columns: Select Reg ID, Name, DRP, UDC, LSE, SUBLAP, DLAP, DRP SC, Resource ID, Resource Type, Program, Baseline Method, Start Date, End Date, and Status. Two rows are visible: one with Reg ID 542913 and Name 'Create\_Reg\_Prodtestbed' (Status: New), and another with Reg ID 542721 and Name 'DRSouthbay' (Status: Confirmed). Below the Registrations table, there's a 'Locations' section with a table. The table has columns: Loc ID, SAN, Resource ID, Start date, End date, and Distribution Factor. Two rows are visible: one with Loc ID 542927 and SAN 'PTR12345' (Status: New), and another with Loc ID 542941 and SAN 'UDC\_LSE\_NEW\_1' (Status: Confirmed). Each row in the Locations table has a 'View Location' button.

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