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| **Performance Evaluation Methodology Approval Request Attachment:** **Proxy Demand Resource Load Shift Resource with Customer Load Baseline**  |
| **PDR-LSR with CLB Baseline Methodology being utilized where the facility/residential load is offering load curtailment, and the behind-the-meter energy storage (ES) device is providing both load curtailment and load consumption.** |
| 1. **Have you submitted a Settlement Quality Meter Data (SQMD) plan template? If no, please complete and submit a SQMD template along with this form for the approval of the Baseline Methodology. SQMD plan template is for the approval of the behind-the-meter energy storage device.**

**Submit the SQMD Plan Template to:** **NRI@caiso.com****; CC:** **PDR@CAISO.com****The template is located at:** http://www.caiso.com/Documents/SQMDPlanTemplate.docx **SQMD Plan Submission process:****http://www.caiso.com/Documents/5750.pdf** |
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| 1. **For the behind-the meter energy storage providing both load CURTAILMENT and CONSUMPTION, describe the behind-the-meter energy storage (ES) device, its characteristics, and adherence to ISO metering requirements:**
2. **Describe how the LSR-Curtailment will be calculated and process to ensure the meter data used will consist only of the energy output up to that which is serving facility load.**
3. **Describe how the LSR-Consumption will be calculated and process to ensure the meter data used consist only of the behind-the-meter storage Device.**
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| 1. **Customer Load Baseline Methodology: Select the Customer Load Baseline that will be utilized to establish the performance of the resource associated with its load reduction, and consumption independent and separately from offsetting BTM or Energy Storage generation.**
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| **☐** [ ]  **Day Matching 5 in 10 Performance Methodology****☐** [ ]  **Day Matching 10 in 10 Performance Methodology Base**[ ]  **Day Matching Combined Performance Methodology**[ ]  **Weather Matching Performance Methodology** |
| **For sections 4-8, if more than one (1) Baseline Methodology is selected in section 3, please identify the Baseline Methodology which you have selected, and provide descriptions to the response in each sections for each Baseline Methodology.** |
| 1. **For above selected Customer Load Baseline Methodology: Describe how eligible baseline days are determined.**
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| 1. **For above selected Customer Load Baseline Methodology: Describe the baseline day selection criteria utilized.**
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| 1. **For above selected Customer Load Baseline Methodology: Describe how baseline adjustments will be applied, if any**
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| 1. **The PDR-LSR where the facility /residential load is offering both load curtailment and consumption : Describe how the facility/residential load Customer Load Baseline value is derived and process to ensure the meter data including interval size recorded (5 minute, 15 minutes, hourly) used will consist only of the energy output up to that which is serving facility load.**
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|  **For Customer Load baseline where the facility /residential load is offering load curtailment : Describe how the Generator Output Baseline will be calculated and process to ensure the meter data used will consist only of the energy output up to that which is serving facility load.** |
| 1. **Describe in detail the meter data processing and controls in place to assure compliance for each the performance methodology calculations.**
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