New York ISO
Independent System Operator

UG 11

Demand Response Information System User's Guide

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12. Performing Reliability Program Demand Response Event-Specific or Test-Specific Tasks

For NYISO's Reliability Programs, Demand Response Events and Tests consist of receiving Event Notifications, reporting expected curtailment values by zone or subload pocket and reporting resource load reduction data following the event or test.

DRIS Event Notification provides the means to perform the following:

- Receive Event Notifications for events and performance tests

- View Event Notifications requiring an expected curtailment value

- Report expected curtailment values by zone or subload pocket

- View summary data of a specific event or test notification

- Receive and acknowledge Event Notifications for Communication Tests

For those MPs with resources that curtailed load in response to a Demand Response Event or Test, DRIS provides the means to perform the following:

- View details of a specific event or test

- Report and view resource responses to an event or test

- View resource payment details for an event or test

- Export payment details for an event or test

12.1. Receiving Event Notifications

Market Participants will be notified of Demand Response events, SCR performance tests, and communication tests through an email message and an automated phone message.

Before an MP organization can receive Event Notifications, the following criteria must be met:

The MP organization must have set up and assigned one or more Event-Responder Contacts in DRIS for the specific DR program (see Section 6 "

Managing Market Participant Organization Contacts").

- The MP must have enrolled resources for the Capability Period and auction month in one or more zones or subload pockets indicated on the Event Notification.

- An MP organization participating in the SCR program must establish an Event-Responder Contact for both the SCR and EDRP programs to ensure receipt of Event Notifications in auction months when an SCR resource has zero auction sales and is converted to an EDRP resource.

> **Note:** Only contacts within DRIS with a contact type association of Event-Responder will receive Event Notifications of Demand Response events, SCR performance tests, and communication tests called by the NYISO.

As illustrated in Figure 259 and Figure 260, both email and automated phone Event Notifications contain the following parameters:

- *Notification Type:* NYISO Event, Targeted Demand Response Program Event, Performance Test 1, or Performance Test 2

- *Program:* SCR or EDRP

- *Message Type:* Day-Ahead Advisory, In-Day Advisory, 2-Hour Activation, Immediate Activation, Extension, Early Termination, or Communication Test

- *Zone(s) or Subload Pocket(s)*

- *Start Time of Event*

- *End Time of Event*

- *Date of Performance Tests:* for Performance Test Event Notifications only

Additionally, the email Event Notification will indicate the "From" email address as edrp-scr@nyiso.com and display a "Subject" line stating the Message Type, Program, Zone(s) or Subload Pocket(s), Date of Event, Start Time of Event and End Time of Event (see Figure 259).

The automated phone Event Notification will display the caller ID as the NYISO Customer Relations phone number, "518-356-6060" and begin with "This is a message from the New York ISO" (see Figure 260).

> **Note:** After the initial automated phone statement, "This is a message from the New York ISO", the automated phone system will prompt the listener to "Press 1" to play the Event Notification message. Once the message has completed, the system will prompt the listener to "Press 1" to confirm receipt of the message or "Press 2" to replay the message.

Figure 259: Example Email Message for SCR 2-Hour Activation

- *Email from*: edrp-scr@nyiso.com

- *Email Subject Line*:
  - **Activation(2 Hour Notice)** Notification for **SCR** Resources in Zones **G, I, J, K** starting on **05/24/2012** at **14:00** and ending at **18:00**

- *Email Content*:

  Special Case Resources are needed today starting at 14:00 and ending at 18:00 Special Case Resources located in zones G, I, J, K are subject to this notice. Each Responsible Interface Party (RIP) must respond within one hour by logging into the NYISO Demand Response Information System (DRIS) and entering the load reduction levels (KWs) expected to be achieved on the system in each zone. This data is used for reliability purposes.

  Participation in this event is mandatory for each Special Case Resource sold during 05/2012 and load reduction achieved by each Special Case Resource during this event is expected to be at the value of the KWs sold. Special Case Resources that fail to participate in this event at the value of the KWs sold during 05/2012 will be subject to future de-rating, as described in the applicable ISO Procedures and the corresponding RIPs may be subject to deficiency penalties pursuant to ISO Procedures.

  This constitutes an official Special Case Resource Event Activation Two Hour notice.
  If any questions arise concerning this Special Case Resource Activation Two Hour notice please contact NYISO Customer Relations at 518-356-6060.

Figure 260: Example Phone Message for SCR 2-Hour Activation

- *Phone Caller ID*: 518-356-6060

- *Phone Introduction:*
  - *"This is a message from the New York ISO"*

- *Phone Message Content:*

  Special Case Resources are needed today starting at **14:00** and ending at **18:00**. Special Case Resources located in zones **G, I, J, K** are subject to this notice. Each Responsible Interface Party must respond within one hour in accordance with separate email instructions. Participation in this event is mandatory for each Special Case Resource sold during 05/2012 and load reduction achieved by each Special Case Resource during this event is expected to be at the value of the KWs sold. This constitutes an official Special Case Resource **Event Activation 2 Hour notice**. If any questions arise concerning this Special Case Resource Event 2 Hour notice please contact NYISO Customer Relations at 518-356-6060.

12.2. Viewing Event Notifications Requiring an Expected Curtailment Response

After MPs have received an Event Notification, which requires a response in the form of an expected curtailment value, the Event Notification is viewable in DRIS.

Event Notifications which require an expected curtailment value include:

- All NYISO and TDRP Events with the Message Type of:
    - Day-Ahead Advisory
    - In-Day Advisory
    - 2-Hour Activation
    - Immediate Activation
- SCR Performance Test 1 and SCR Performance Test 2 with the Message Type of:
    - Day-Ahead Advisory
    - 2-Hour Activation

Viewing Event Notifications requiring an expected curtailment value provides the MP with a snapshot of notifications that may be narrowed by the following parameters:

- Capability Period
- Events from date
- Notification type
- Message type
- Program
- Zone or Subload Pocket
- Include Expired

The system initially displays all notifications for the current Capability Period. The following data is displayed for each notification:

- Capability Period
- Notification type
- Notice sent date/time
- Message type
- Program
- Event start date/time

- Event end date/time

- Zone(s) or Subload pocket(s)

- Response expiration date/time

- Notification created by

Pre-requisites

- The MP representative performing the task is logged in to DRIS (see section 1.3, "Accessing the System").

- An Event Notification requiring an expected curtailment value exists in DRIS.

⌨ ***To view an Event Notification requiring an excepted curtailment value***

1. From the **Notification** menu, choose **Response Summary**.

   The system displays the Notification Responses page with search criteria defaulted to initially display all Event Notifications for the current Capability Period. To further narrow or expand the display of Event Notifications, from the corresponding search filters in the uppermost frame on the Notification Responses page (see Figure 261), choose from any combination of **Capability Period, Events from Date, Notification Type, Program, Message Type, Zone,** and/or **Exclude Expired** for which the system should display Event Notifications.

Figure 261: Notification Responses Page Search Filters
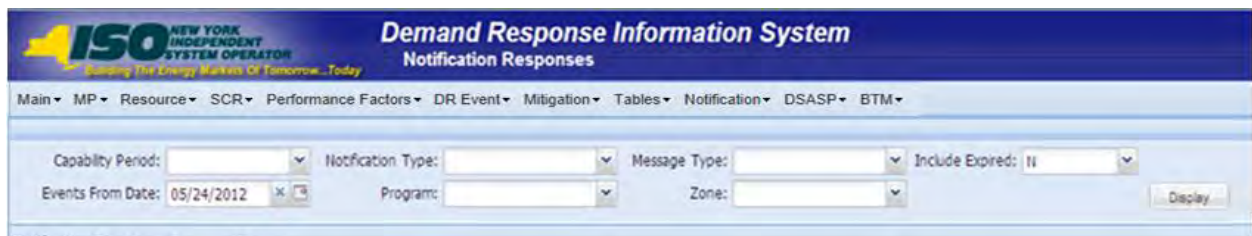
2. Near the top of the Notification Responses page, click the **Display** button.

   The system populates the Notification Responses page below the search filters with data for the events or tests meeting the criteria chosen in at step 2 (see Figure 262).

Figure 262: Notification Responses Page Populated with Data

> **Note:** The Notification Responses page defaults to display all Event Notifications requiring an expected curtailment value that have a Response Expiration Date/Time which has not yet expired.

3. In the Notification Requiring a Response Summary grid below the search filters, click the row corresponding to the Event Notification for which expected curtailment values have been previously entered.

    The Notification Responses frame in the lowermost area of the page refreshes to display the expected curtailment values for the specific zones or subload pockets on the Event Notification (see Figure 263).

Figure 263: Notification Responses Frame Populated with Expected Curtailment Values

12.3. Responding to Event Notifications Requiring an Expected Curtailment Value

Market Participants should respond through DRIS with the expected curtailment values for each zone or subload pocket indicated in the Event Notification for which resources are enrolled.

The Response Expiration Date/Time of the Event Notification specifies at what time expected curtailment values will no longer be accepted into DRIS. The Response Expiration Date/Time is determined by the Notice Sent Date/Time (see Figure 262). Market Participants will have one hour to respond with expected curtailment values for all event and performance test notifications which require a response.

Market Participants may update expected curtailment values to an Event Notification multiple times prior to the Response Expiration Date/Time. The zonal or subload pocket expected curtailment value with the most recent submittal date will be saved in DRIS.

Once the Response Expiration Date/Time has passed, MPs will not be able to enter an expected curtailment value for the Event Notification.

> **Note:** Market Participants and their resources are expected to reduce load during the hours of the Event even if the MP has not entered the expected curtailment values before the Response Expiration Date/Time. Reporting of the expected curtailment values in response to an Event Notification does not modify the actual load reduction that is expected of the resource during the actual hours of the event.

> **Note:** MPs will receive a separate Event Notification for Events that are either extended or terminated early from the original event end time for one or more of the zones or subload pockets on the original Event Notification. MPs will not respond with expected kW curtailment values to Events that are extended or terminated early. The MP expected kW curtailment value from the original Event Notification will be used as the MP expected kW curtailment value for Events which are extended.

Pre-requisites

- The MP organization is registered in MIS on the date that the event or test occurs.

- The MP organization is enrolled in DRIS in the DR program and Capability Period for which the event or test occurs.

- The MP representative performing the task has been assigned the DRIS Web UI MP User privilege.

- The MP representative performing the task is logged in to DRIS (see Section 1.3, "Accessing the System").

- The MP organization must have enrolled resources for the Capability Period and auction month in one or more zones or subload pockets indicated on the Event Notification.

- The Event Notification to which the MP is responding has not yet expired.

🖥️ *To respond to an Event Notification*

1. From the **Notification** menu, choose **Response Summary**.

   The system displays the Notification Responses page with search criteria defaulted to initially display all Event Notifications for the Capability Period.

2. To further narrow or expand the display of Event Notifications, from the corresponding search filters in the uppermost frame on the Notification Responses page (see Figure 264), choose from any combination of **Capability Period, Events from Date, Notification Type, Program, Message Type, Zone,** and/or **Exclude Expired** for which the system should display Event Notifications.

Figure 264: Notification Responses Page Search Filters

3. Near the top of the Notification Responses page, click the **Display** button.

    The system populates the Notification Responses page below the search filters with data for the events or tests meeting the criteria chosen in at step 2 (see Figure 265).

Figure 265 : Notification Responses Page with Notification Selected for Responding with Expected Curtailment Values

4. Select the row containing the Event Notification for which expected curtailment values are to be entered and click the **Respond** button in the lower-right corner of the frame to initiate the Notification Response window (see Figure 265).

5. The Notification Response window provides the text of the email from the Event Notification message, the zone(s) or subload pocket(s) from the Event Notification which are specific to the MP organization, and the Total kW Available curtailment by zone or subload pocket (see Figure 266).

Figure 266: Notification Response Window

6. To enter the expected curtailment value for each zone or subload pocket click the Expected kW Commitment field to make it editable (see Figure 267) and type in the numeric value of expected curtailment in kW increments (see Figure 268).

> *Note:* The Expected kW Commitment may be greater than the Total kW Available. DRIS will provide a Warning message when the Expected kW Commitment exceeds 110% of the Total kW Available for a specific zone or subload pocket. The user should accept the Warning message and the value will be saved in DRIS. The value may then be changed by clicking on the Expected kW Curtailment field and entering and saving a new Expected kW Commitment.

7. Alternately, to indicate no expected curtailment value for a specific zone or subload pocket, check the Not Participating box for the row of the zone or subload pocket.

DRIS will automatically assign an Expected kW Commitment value of zero (see Figure 268).

Figure 267: Notification Response Window with Expected kW Commitment field made Editable

Figure 268: Notification Response Window with Expected kW Commitment Values

8. When all zones or subload pockets have had Expected kW Commitment values assigned or been indicated as Not Participating, click the **Save** button in the lower-left corner of the frame to save the response to the Event Notification (see Figure 268).

9. View the saved responses to the Event Notification from the lowermost area of the Notification Responses page (see Figure 269).

Figure 269: Notification Responses Frame Populated with Expected Curtailment Values
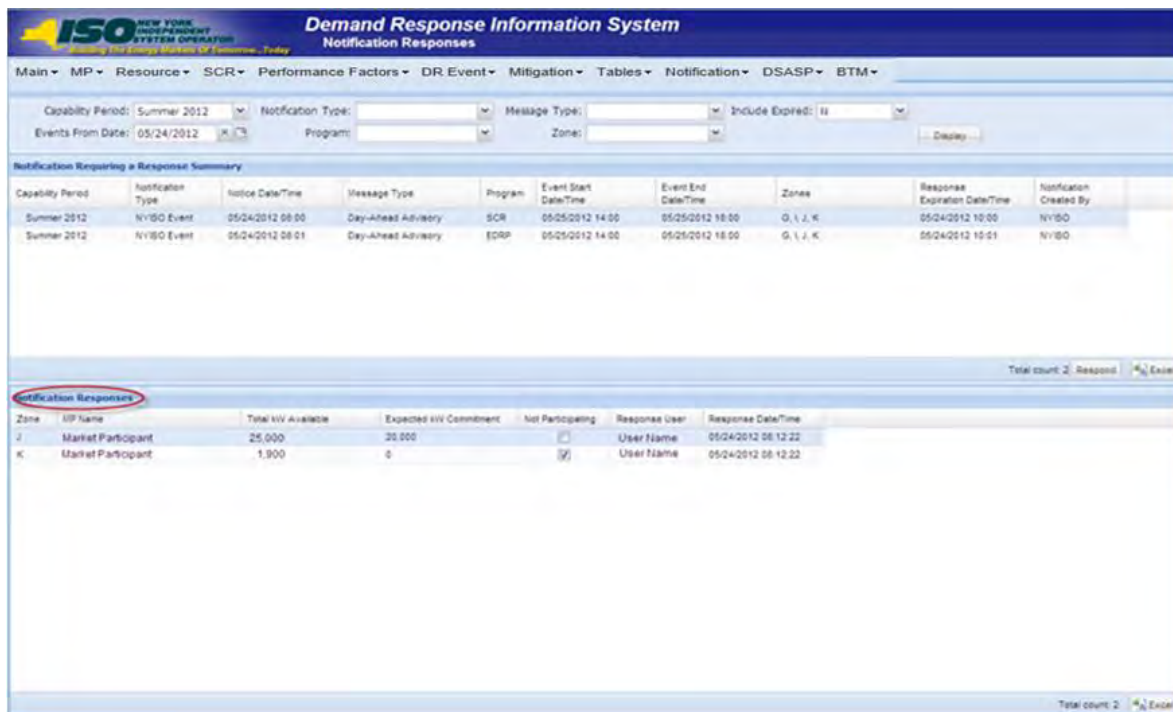
12.4. Viewing Event Notifications

Market Participants can view summary information for event, SCR performance test, and communication test notifications issued by the NYISO. This allows for viewing of all notifications, including those for which the MP was not eligible to participate.

Viewing Event Notifications provides the MP with a snapshot of notifications which may be narrowed by the following parameters:

- Capability Period
- Events from date
- Notification type

- Message type

- Program

- Zone or Subload Pocket

The system initially populates the Events from Date with the system date and displays all notifications that have an Event End Date that occurs on or after the system date. The following data is displayed for each notification:

- Capability Period

- Notification type

- Notice date/time

- Message type

- Program

- Event start date/time

- Event end date/time

- Zone(s) or Subload pocket(s)

- Response expiration date/time

- Notification created by

Pre-requisites

- The MP representative performing the task is logged in to DRIS (see section 1.3, "Accessing the System").

- An Event Notification exists in DRIS.

🖥   *To view an Event Notification*

1. From the **Notification** menu, choose **Summary.**

     The system displays the Notification Summary page with search criteria defaulted to initially display all Event Notifications with an Event End Date that occurs on the system date.

2. To further narrow or expand the display of Event Notifications, from the corresponding search filters in the uppermost frame on the Notification Summary page (see Figure 270), choose from any combination of **Capability Period, Events from Date, Notification Type, Program, Message Type,** and **Zone** for which the system should display Event Notifications.

Figure 270: Notification Summary Page Search Filters

3. Near the top of the Notification Summary page, click the **Display** button.

    The system populates the Notification Summary page below the search filters with data for the events or tests meeting the criteria chosen in at step 2 (see Figure 271).

Figure 271: Notification Summary Page Populated with Date

> *Note:* The Notification Summary page defaults to display all Event Notifications with an Event End Date that occurs on or after the system date.

12.5. Receiving and Acknowledging Communication Tests

A Communication Test is a notification which provides for testing of the Event Notification process. The test allows for MPs to verify receipt of communications from the NYISO through email and phone and verify the ability of the MP organization to access DRIS to respond to a notification.

After MPs have received a Communication Test which requires an acknowledgement of receipt in DRIS, the Event Notification is viewable in DRIS.

Before an MP organization can receive a Communication Test, the following criteria must be met:

The MP organization must have set up and assigned one or more Event-Responder Contacts in DRIS for the specific DR program (see section 6 "

Managing Market Participant Organization Contacts”).

Additionally, the email Communication Test will indicate the “From” email address as edrp-scr@nyiso.com and display a “Subject” line announcing that it is a Communication Test (see Figure 272).

The automated phone Event Notification will display the caller ID as the NYISO Customer Relations phone number, “518-356-6060” and begin with “This is a message from the New York ISO” (see Figure 273).

> **Note:** After the initial automated phone statement, “This is a message from the New York ISO”, the automated phone system will prompt the listener to “Press 1” to play the Event Notification message. Once the message has completed the system will prompt the listener to “Press 1” to confirm receipt of the message or “Press 2” to replay the message.

Figure 272: Example Email Message for Communication Test

- *Email from*: edrp-scr@nyiso.com

- *Email Subject Line*:
  - **NYISO Communication Test**

- *Email Content*:

  This is a communications test of the Demand Response Emergency Notification System for Emergency Demand Response Program (EDRP) resources and Special Case Resources in Zones A through K. This communication test is used to verify that Event Responder contacts in the Demand Response Information System (DRIS) are receiving e-mail and phone messages.

  Individual resources are not required to respond.

  Please have one representative from your organization provide a response within one hour by logging into the NYISO Demand Response Information System.

  If any questions arise concerning this communications test please contact NYISO Customer Relations at 518-356-6060.

Figure 273: Example Phone Message for Communication Test

- *Phone Caller ID*: 518-356-6060

- *Phone Introduction*:
  - *"This is a message from the New York ISO"*

- *Phone Message Content*:

  This is a **communications test** of the Demand Response Emergency Notification System for Emergency Demand Response Program resources and Special Case Resources in Zones A through K. This communication test is used to verify that all Event Responder contacts in the Demand Response Information System are receiving e-mail and phone messages. Individual resources are not required to respond. Please have one representative from your organization respond within one hour in accordance with separate email instructions. If any questions arise concerning this communications test please contact NYISO Customer Relations at 518-356-6060.

Pre-requisites to view a Communication Test

▪ The MP representative performing the task is logged in to DRIS (see section 1.3, "Accessing the System").

▪ A Communication Test requiring an acknowledgement exists in DRIS.

🖥 *To view a Communication Test*

1. From the **Notification** menu, choose **Response Summary**.

    The system displays the Notification Responses page with search criteria defaulted to initially display all Event Notifications for the Capability Period.

2. To further narrow or expand the display of Event Notifications, from the corresponding search filters in the uppermost frame on the Notification Responses page (see Figure 274), choose from any combination of **Capability Period, Events from Date, Notification Type, Program, Message Type, Zone,** and/or **Exclude Expired** for which the system should display Event Notifications.

Figure 274: Notification Responses Page Search Filters
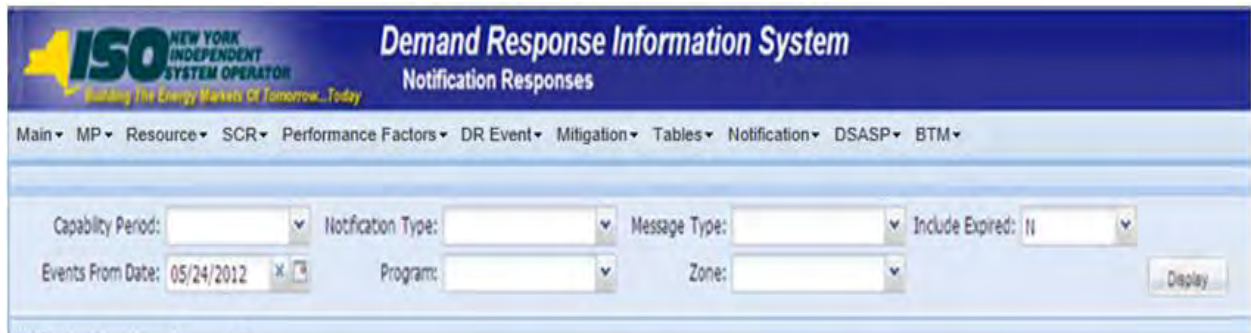
3. Near the top of the Notification Responses page, click the **Display** button.

    The system populates the Notification Responses page below the search filters with data for the events or tests meeting the criteria chosen in at step 2 (see Figure 275).

4. A Communication Test can be identified by viewing the Message Type of the Event Notification (see Figure 275). Communication Tests will have no associated program or zone(s) or subload pocket(s).

Figure 275: Notification Responses Page with Communication Test
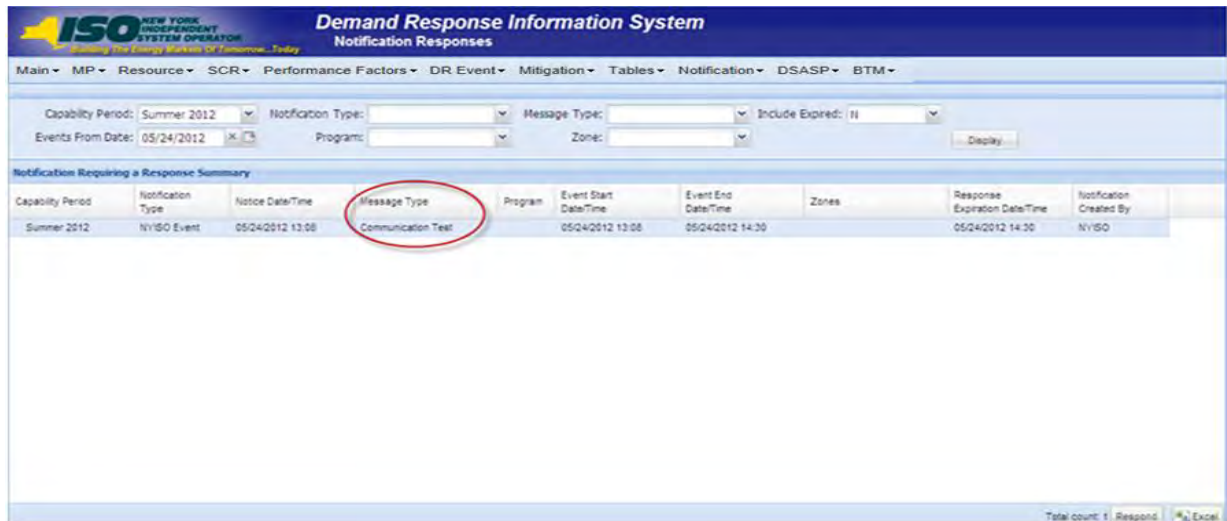
Pre-requisites to respond to a Communication Test

- The MP representative performing the task has been assigned the DRIS Web UI MP User privilege.

- The MP representative performing the task is logged in to DRIS (see Section 1.3, "Accessing the System").

- A Communication Test requiring an acknowledgement exists in DRIS.

- The Communication Test the MP is acknowledging has not yet expired.

🖥 **To respond to a Communication Test**

1. From the Notification Responses page, select the row housing the Communication Test notification and click the **Respond** button in the lower-right corner of the frame to initiate the Notification Response window (see Figure 276).

Figure 276: Notification Responses Page with Communication Test Selected for Responding with Acknowledgement

2. A Confirm Message window appears requesting acknowledgement of receipt of the Communication Test (see Figure 277). Click **OK** to acknowledge receipt as a response to the Communication Test.

Figure 277: Communication Test Acknowledgement Confirmation Window
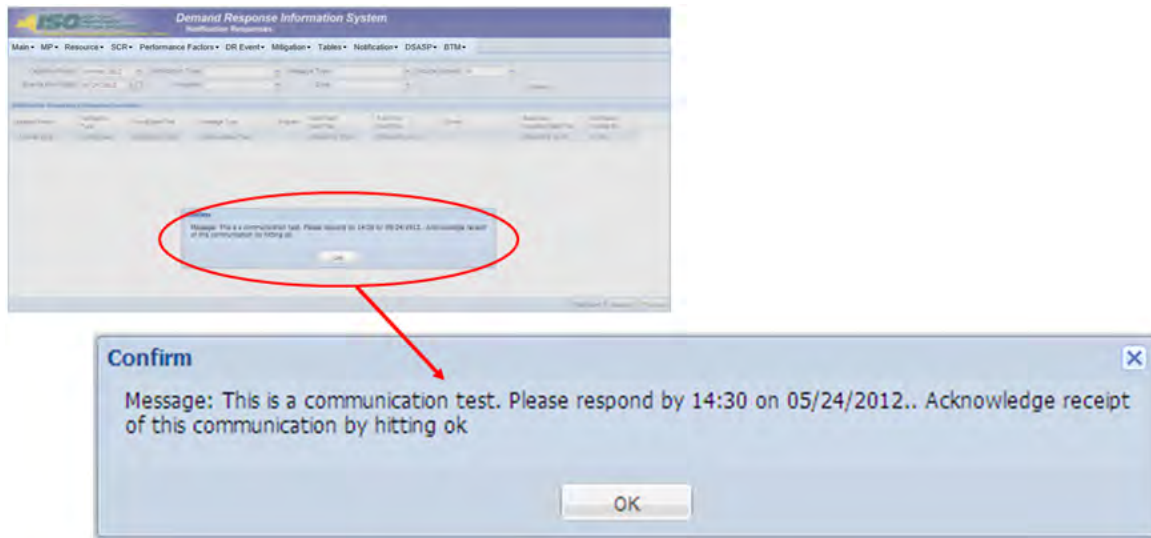
3. DRIS returns to the Notification Responses screen and refreshes to display the Notification Responses frame in the lowermost area of the page with the acknowledgement of the Communication Test displayed with the Response User and Response Date/Time saved (see Figure 278).

> *Note:* When multiple contacts at an MP organization receive the Communication Test, only one user acknowledgement per MP organization is required in DRIS. If multiple contacts from the same MP organization acknowledge the Communication Test, the confirmation with the most recent submittal date will be saved in DRIS.

Figure 278: Notification Responses Frame Populated with Communication Test Acknowledgement
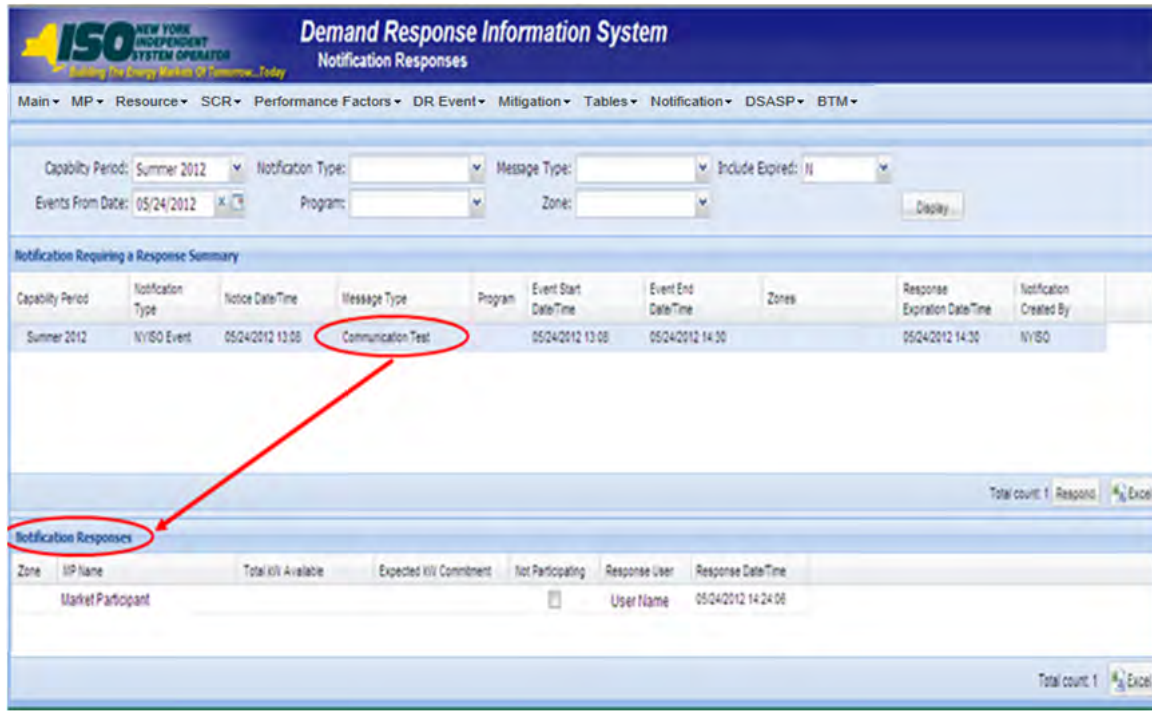
12.6. Viewing Event or Test Details

Once the event or test has taken place, the following details about the event will be made available for viewing in DRIS. These details will be used in ascertaining proper resource response data for import into DRIS.

- *Capability Period:* Capability Period in which the event or test occurred

- *Event Type:* Designation of the event as NYISO Event, Test, or TDRP Event

- *Program:* SCR or EDRP

- *Event Start Date:* The Start Date and Time of the event

- *Event End Date:* The End Date and Time of the event

- *Zones:* The zones and percentages or subload pockets and percentages called for the event

- *First Hour of Payment:* The first resource response hour that will be accepted for payment, Hour Beginning

- *Last Hour of Payment:* The last resource response hour that will be accepted for payment, Hour Beginning

- *First Hour of Performance:* The first resource response hour that will be accepted for the purpose of performance calculation, Hour Beginning

- *Last Hour of Performance:* The last resource response hour that will be accepted for the purpose of performance calculation, Hour Beginning

- *CBL Start Date:* The first date of the date range that may be used as a resource CBL Date when reporting the resource response to the event

- *CBL End Date:* The last date of the date range that may be used as a resource CBL Date when reporting the resource response to the event

- *Response Submittal End Date:* The last date when resource responses will be accepted, as an import into DRIS, for the event

> **Note:** A null value displayed in the *First Hour of Performance* and the *Last Hour of Performance* indicates an event for which there was no day-ahead notice. The performance of SCR resources in an event for which there was no day-ahead notice will not be used in the calculations of the SCR resource performance factor. However, metered kW values are still required for all event hours on the event response import file when reporting resource data for event payments for an event for which there was no day-ahead notice.

⌨ To view event or test details

1. From the **DR Event** menu, choose **DR Event Summary**.

   The system displays the Summary of Demand Response Events page.

2. From the corresponding search filters in the uppermost frame on the Summary of Demand Response Events page (see Figure 279), choose from any combination of **Capability Period, Month, Event Type, Program** and/or **Zone** for which the system should display events or tests.

Figure 279: Summary of Demand Response Events Page Search Filters

3. Near the top of the Summary of Demand Response Events page, click the **Display** button.

The system populates the DR Summary page below the search filters with data for the events or tests meeting the criteria chosen at step 2 (see Figure 280).

Figure 280: Summary of Demand Response Events Page Populated with Data

12.7. Managing Resource Responses to an Event or Test

Resource responses to an event or test must be imported into DRIS within a pre-established time frame. This limited response acceptance period occurs up to and including seventy five days from the event or test date as specified on the DRIS Event Calendar (refer to Section 2.1).

It is the responsibility of the MP to perform the following:

1. Create a correctly structured, formatted, and populated event response file

2. Import the event response file to DRIS

3. Review and manage as necessary the results of the import process

Task 3 immediately preceding may require the MP take an additional action in the form of, for example, correcting exceptions (i.e., data errors, changes, or omissions) that prevent import of some or all data.

> **Note:** Reporting resource event response data through the event response import file in DRIS is the **only** means by which response data will be accepted by the NYISO. The imported data will be used for both the determination of future performance calculations and for the processing of payment for the event or test.

12.7.1. Creating an Event Response File

Resource response to an event or test for the purposes of payment processing and/or for future performance calculations is initiated via MP import of the 'Event Response Import Template' File to DRIS. The 'Event Response Import Template' file can be accessed at www.nyiso.com >demand-response >SCR

Forms & Template> DRIS_SCR_Event_Response_Import_Template.xlsx. Responses from multiple resources may be submitted at one time, provided that the responses are for the same event or test as specified by DRIS.

As illustrated by the sample event response file in Figure 281, the .xlsx file header must identify the event type, DR program, and event start date and time. The file must also contain data for each resource that responded to the event or test, and must contain column headings.

Figure 281: Sample Event Response File in Excel

In order for an event response file to be successfully processed by DRIS, the header data must meet pre-defined rules. Figure 282 details these rules along with the error messages the system will generate should the file violate any of the rules. Likewise, in order for resource event response data to be imported to the

system, the data must meet pre-defined rules related to formatting and value, based on the DR program rules. Figure 283 details the rules specific to the resource event response data.

After creating a properly structured, formatted, and populated event response file, the MP must import the file to DRIS as the next step in reporting resource responses to an event or test.

Figure 282: Rules for Successful Processing of Event Response Import File

Attribute	Rule	Error Message
Event Type	The event type in the header must match that corresponding to the event chosen via the system interface.	Event Type <Event Type> in the Import File header does not match Event Type corresponding to the event selected for Import.
Program	The program in the header must match that corresponding to the event chosen via the system interface.	Program <Program> in the Import File header does not match Program corresponding to the event selected for Import.
Start Date	The start date and time in the header must match that corresponding to the event chosen via the system interface. Must be in the following format: MM/DD/YYYY HH:MM	Start Date <Start Date> in the Import File header does not match Start Date corresponding to the event selected for Import.

Figure 283: Rules Specific to Resource Data in Event Response File

Event Response Field Name	Column in Import File	Field Format	Description and Rule(s)
Resource ID	A	Numeric	The Resource ID assigned by the NYISO.
TO Account Number	B	Text Up to 30 characters	The account number that is associated with the resource in DRIS.
Performance Only Flag	C	Text 1 character	If Resource response is to be used for Performance calculations only, enter an X into the Performance Only Flag field and the CBL Date, CBL Include Indicator, and CBL kW fields remain blank. If Resource response is to be used for both Payment and Performance calculations, leave the Performance Only field blank.
Meter Authority	D	Text Up to 3 characters	The Transmission Owner or Meter Services Entity that is providing the meter data used for the Top 40 ACL values for the resource being enrolled. The Meter Authority will be the 3 character abbreviation for the Meter Authority being used for the resource. The list of abbreviated

Event Response Field Name	Column in Import File	Field Format	Description and Rule(s)
			Meter Authority names can be found on the NYISO: Approved Meter Services Entities
CBL Date 1	D	Date MM/DD/YYYY	Customer Baseline calculation date 1.
CBL Include Indicator 1	E	Text 1 character	If CBL Date 1 is included in the CBL calculation, enter a *Y* into the CBL Indicator 1 field. If CBL Date 1 is not included in the CBL calculation, enter an *N* into the CBL Indicator 1 field.
CBL Date 2	F	Date MM/DD/YYYY	Customer Baseline calculation date 2.
CBL Include Indicator 2	G	Text 1 character	If CBL Date 2 is included in the CBL calculation, enter a *Y* into the CBL Indicator 2 field. If CBL Date 2 is not included in the CBL calculation, enter an 'N' into the CBL Indicator 2 field.
CBL Date 3	H	Date MM/DD/YYYY	Customer Baseline calculation date 3.
CBL Include Indicator 3	I	Text 1 character	If CBL Date 3 is included in the CBL calculation, enter a *Y* into the CBL Indicator 3 field. If CBL Date 3 is not included in the CBL calculation, enter an *N* into the CBL Indicator 3 field.
CBL Date 4	J	Date MM/DD/YYYY	Customer Baseline calculation date 4.
CBL Include Indicator 4	K	Text 1 character	If CBL Date 4 is included in the CBL calculation, enter a *Y* into the CBL Indicator 4 field. If CBL Date 4 is not included in the CBL calculation, enter an *N* into the CBL Indicator 4 field.
CBL Date 5	L	Date MM/DD/YYYY	Customer Baseline calculation date 5.
CBL Include Indicator 5	M	Text 1 character	If CBL Date 5 is included in the CBL calculation, enter a *Y* into the CBL Indicator 5 field. If CBL Date 5 is not included in the CBL calculation, enter an *N* into the CBL Indicator 5 field.
CBL Date 6	N	Date MM/DD/YYYY	Customer Baseline calculation date 6.

Event Response Field Name	Column in Import File	Field Format	Description and Rule(s)
CBL Include Indicator 6	O	Text 1 character	If CBL Date 6 is included in the CBL calculation, enter a *Y* into the CBL Indicator 6 field. If CBL Date 6 is not included in the CBL calculation, enter an *N* into the CBL Indicator 6 field.
CBL Date 7	P	Date MM/DD/YYYY	Customer Baseline calculation date 7.
CBL Include Indicator 7	Q	Text 1 character	If CBL Date 7 is included in the CBL calculation, enter a *Y* into the CBL Indicator 7 field. If CBL Date 7 is not included in the CBL calculation, enter an *N* into the CBL Indicator 7 field.
CBL Date 8	R	Date MM/DD/YYYY	Customer Baseline calculation date 8.
CBL Include Indicator 8	S	Text 1 character	If CBL Date 8 is included in the CBL calculation, enter a 'Y' into the CBL Indicator 8 field. If CBL Date 8 is not included in the CBL calculation, enter an 'N' into the CBL Indicator 8 field.
CBL Date 9	T	Date MM/DD/YYYY	Customer Baseline calculation date 9.
CBL Include Indicator 9	U	Text 1 character	If CBL Date 9 is included in the CBL calculation, enter a *Y* into the CBL Indicator 9 field. If CBL Date 9 is not included in the CBL calculation, enter an *N* into the CBL Indicator 9 field.
CBL Date 10	V	Date MM/DD/YYYY	Customer Baseline calculation date 10.
CBL Include Indicator 10	W	Text 1 character	If CBL Date 10 is included in the CBL calculation, enter a *Y* into the CBL Indicator 10 field. If CBL Date 10 is not included in the CBL calculation, enter an *N* into the CBL Indicator 10 field.
CBL kW Begin Hour 0 through CBL kW Begin Hour 23	X through AU	Numeric Up to 6 digits before decimal and 1 digit after decimal	Resource hourly CBL calculation for each event hour.
Metered kW Begin Hour 0 through	AV through	Numeric	Resource hourly metered load for each event hour.

Event Response Field Name	Column in Import File	Field Format	Description and Rule(s)
Metered kW Begin Hour 23	BS	Up to 6 digits before decimal and 1 digit after decimal	

> **Note:** The Event Response Import template is available for download from the NYISO Website. The template accounts for a 24- or 23-hour day and has 24 hours for the CBL kW and Metered KW hour fields. In case of 25-hour day for the CBL kW and Metered kW hours fields, "CBL kW begin hour 2" and "Metered kW begin hour 2" should be used twice in the template.

12.7.2. Importing the Event Response File

After creating a properly structured, formatted, and populated event response file, the MP must import the file to DRIS as the next step in the process to report resource responses to an event or test.

Pre-requisites

- The MP organization was registered in MIS on the date that the event or test occurred.

- The MP organization was enrolled in DRIS in the DR program and Capability Period for which the event or test occurred.

- The DRIS Event Calendar indicates that the event or test for which the MP intends to import resource responses is open for performing this task (refer to Section 2.1).

- The MP has created a properly structured, formatted, and populated .csv or .xlsx or .xlsx file for upload of resource event response data to the system, as outlined under Section 12.7.1.

- The MP representative performing the task has been assigned the DRIS Web UI MP User privilege.

- The MP representative performing the task is logged in to DRIS (see Section 1.3, "Accessing the System").

🖥 *To import an event response file*

1. From the **Main** menu, choose **Imports/Exports**.

   The system displays the Imports/Exports page (see Figure 284).

Figure 284: Import/Export Page as Initially Displayed
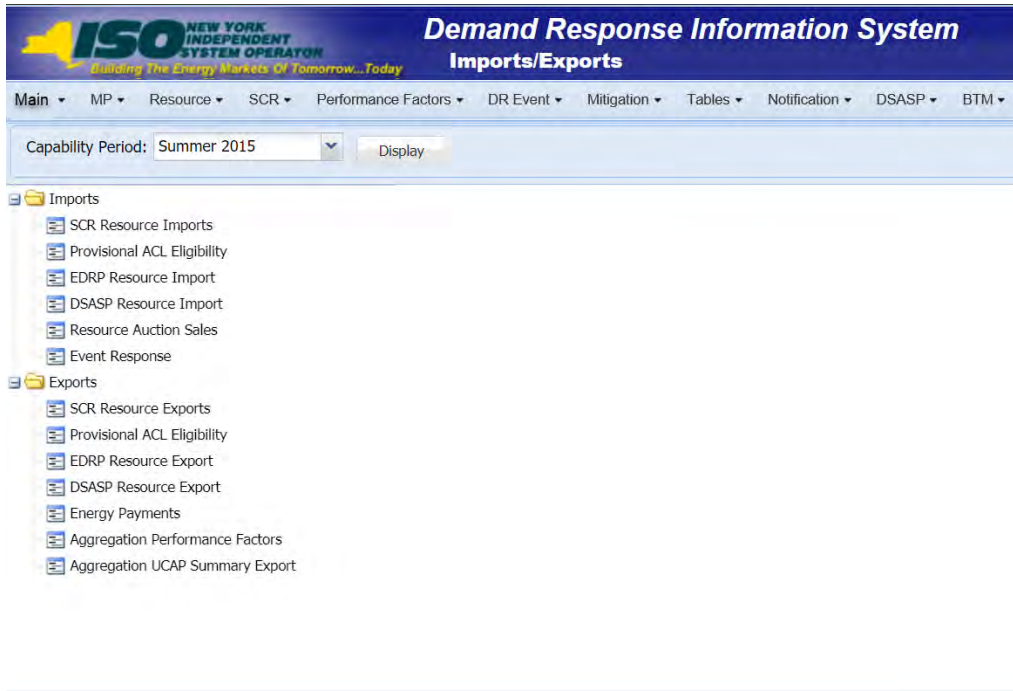
2. From the corresponding filter near the top of the page, choose the **Capability Period** in which the event occurred.

3. Beside the Capability Period filter, click the **Display** button.

   The system activates the middle frame and populates the lowermost frame with a list of import events for the Capability Period chosen at step 2.

4. On the left side of the middle frame and under the **Imports** heading, click **Event Response**.

   The area to the right refreshes to display input components specific to the event for which responses are being imported (see Figure 285).

Figure 285: Import/Export Page Displaying Input Components Specific to Event Responses
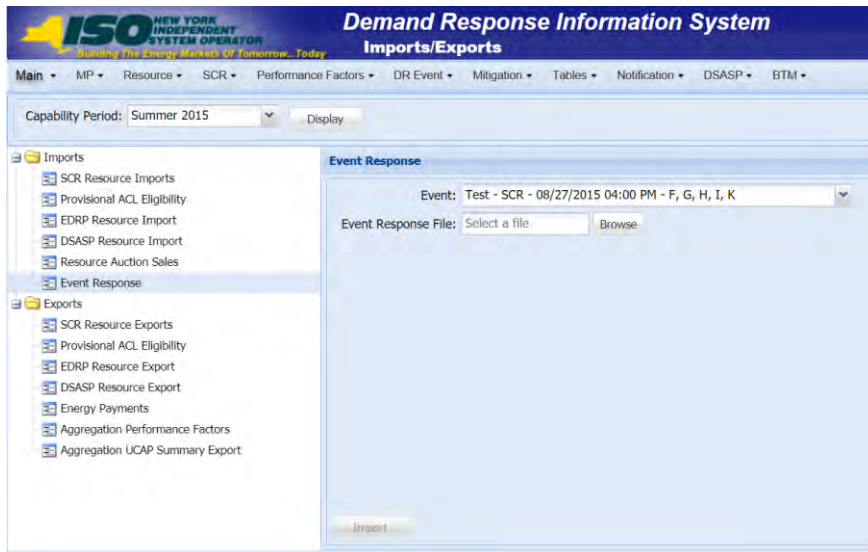
5. Choose the applicable **Event** from the corresponding drop-down filter on the right side of the middle frame.

6. On the right side of the middle frame, click the **Browse** button.

    The system displays a File Upload dialog box.

7. Via the File Upload dialog box, navigate to and choose the file containing the data for the event, then click the **Open** button.

    The File Upload dialog box closes, and the system populates the Event Response File field in the right pane of the middle frame with the name of the chosen file.

8. Click the **Import** button, located in the lower-left corner of the right side of the middle frame.

    The system displays a dialog box summarizing the results of the import process (see Figure 286).

9. Review the import results and proceed accordingly, as outlined under Section 12.7.3.

> **Note:** Records Payment indicates the number of resource responses to an event or test accepted into DRIS for possible energy payment. Any resource responses indicated as Performance Only in the event response import file will not be included in the Records Payment count.

Figure 286: Sample Import Summary Dialog Box for Resource Event Responses

12.7.3. Rectifying Resource Response Exceptions

Once the MP initiates import of the event response file, DRIS evaluates the file and displays a Summary dialog box detailing a number of statistics (see Figure 286). Relevant to the results of the event response import are the count of total records in the file and the count of records in the file reported for payment processing. The difference in the two counts is the resulting number of records in the file reported for Performance Only.

If the displayed dialog box indicates that one or more rows have been designated as having exceptions, the MP must take further action to determine the reason(s) for the exceptions(s) and take corrective action in order to proceed with reporting the resource responses.

> **Note:** If instead of similar information to that illustrated in Figure 286, the *Message* pane in the Summary dialog box displayed by the system indicates that the import failed, no resource response data will be imported. In order to proceed with the event response import process in this case, the MP must rectify the errors in the file header, as outlined in the *Exceptions* pane of the dialog box, and report the revised file containing data for all resources. Section 12.7.1, provides guidance on creating a properly structured and formatted event response file

If the data for one or more resources in the event response file contain exceptions (i.e., data errors, changes, or omissions) that prevent one or more responses from being imported to the system, the import results report details each exception on a separate line and identifies for each exception the resource ID of the record containing the exception, the specific field containing the exception, the value supplied in the field containing the exception, and a message specifying the nature of the exception (see Figure 287). The MP must review the report for purposes of creating and reporting a file containing correct data for the resource responses in question, along with correct header data, prior to the deadline for importing resource responses as specified on the DRIS Event Calendar (refer to Section 2.1).

> **Note:** The MP may access the import report directly from the Summary dialog box displayed immediately following import by clicking the **Excel** button in the lower right-hand corner of the dialog box then taking the requisite steps to either open or save the corresponding file.

Figure 287: Sample Import Results Report for an Event Response File Import

	A	B	C	D	E
1	File Name	Response-11-29-2010.xls			
2	MP Name	NYISO Market Participant			
3	User	MP User			
4	Upload Type	EVENT_RESPONSE			
5	Capability Period	Winter 2010-2011			
6	Auction Month				
7	Start Date of Import	12/22/2010 10:08:45 EST			
8	End Date of Import	12/22/2010 10:08:47 EST			
9	Records in File	25			
10	Records Saved	0			
11	Records Pending Approval	0			
12	Records With Exceptions	1			
13	Records With General Alerts	0			
14	Records With Energy Payment	23			
15	Records With Potential Mitigation	0			
16	Records No Change in DRIS	0			
17	Reference #	Message Type	Field	Value Supplied	Message
18	Resource ID: 2345678	Exception	Metered kW11	-200.6	Metered kW for hour 11 must be greater than or equal to 0
19	Resource ID: 8765403	Exception	CBL kW11	-30	CBL kW for hour 11 must be greater than or equal to 0
20					

Pre-requisite

- The MP representative performing the task is logged in to DRIS (see Section 1.3, "Accessing the System").

💻 *To access the import report and manage related errors*

> **Note:** If the Summary dialog box displayed after import is open, the import report may instead be accessed by clicking the **Excel** button in the lower right corner of the dialog box then taking the requisite steps to either open or save the corresponding file.

1. From the **Main** menu, choose **Imports/Exports**.

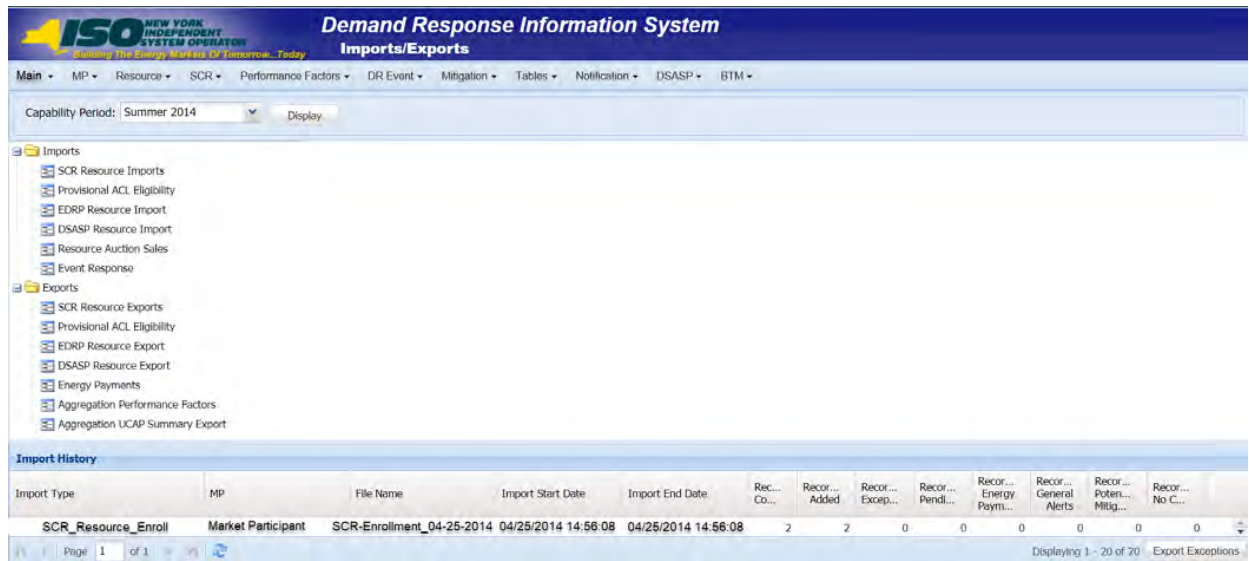   The system displays the Imports/Exports page (see Figure 288).

Figure 288: Imports/Exports Page
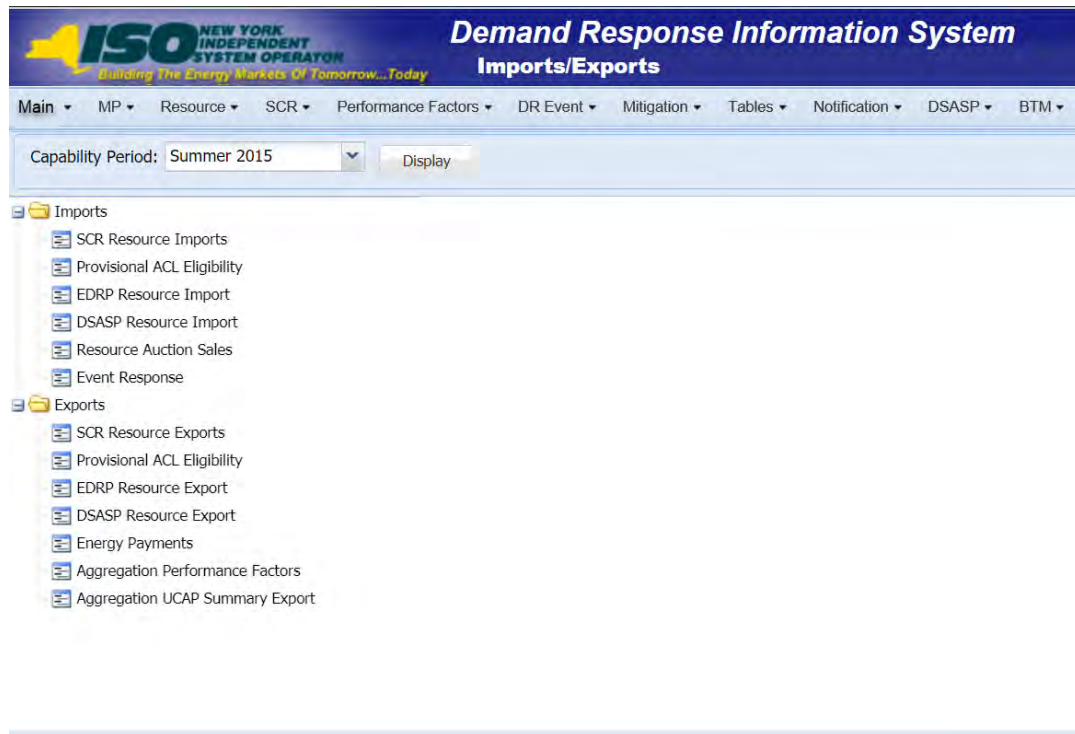
2.   From the corresponding filter near the top of the page, choose the **Capability Period** for the previously reported event response file that generated the exception(s).

3.   Beside the Capability Period filter, click the **Display** button.

The Import History frame at the bottom of the page refreshes to display a grid listing each import event for the chosen Capability Period (see Figure 289).

Figure 289: Populated Import History Grid on Imports/Exports Page

4. In the **Import History** grid, select the entry for the import event that generated the exception(s).

5. In the lower-right corner of page, click the **Export Exceptions** button.

   The system displays a dialog box via which the import report can be saved or opened.

6. Take the requisite steps to either save or open the import report.

   The report is either saved to the designated location or displayed on screen.

7. Review the report, correct all exceptions in the resource enrollment file, then import the updated file to DRIS.

12.7.4. Viewing Resource Responses to an Event or Test

Once the MP has successfully imported resource responses to an event or test, the response data can be viewed at varying levels of detail. In addition, MPs can monitor when a resource response that was reported for payment has been processed, billed, and invoiced. Finally, DRIS provides for downloading event payment details for viewing payment data by a specific event or test.

Resource responses can be viewed at varying levels of detail in DRIS. The MP can view resource responses by:

▪ summary,

- hourly detail, or

- event or test.

12.7.4.1. Viewing a Summary of Resource Responses

Viewing resource responses at a summary level provides the MP with a snapshot of the response to a specific event or test.

When viewing resource responses at the summary level, the MP must, at a minimum, specify a Capability Period and an event or test, or select a specific resource for which to view event or test data.

The MP can further narrow the data the system displays by any of the following additional parameters:

- Zone

- Aggregation

- Response status

Regardless of viewing scope, the system initially displays the following data for each resource response:

- Event, which includes Event Type, Program, Start Date and Time, Zones, and Zonal percentages

- Resource ID

- Resource name

- Program

- Aggregation ID

- Proxy Test indicator

- Provisional ACL indicator

- Incremental ACL indicator

- Response status

- Reason for under review

- Status comments

- Submittal date

- Reported by

- Performance only indicator

- Prepared for settlements indicator

- Invoiced indicator

▪ Small customer aggregation indicator

Pre-requisites

▪ The MP has imported resource responses to an event or test.

▪ The MP has logged in to DRIS, as outlined under Section 1.3, "Accessing the System".

🖥 ***To view a summary of resource responses***

1. From the **DR Event** menu, choose **Event Response Details**.

   The system displays the Event Response Details page.

2. From the corresponding search filter(s) in the uppermost frame on the Event Response Details page (see Figure 290), choose the **Capability Period** and **Event** and/or the **Resource ID** for which the system should display resource responses.

Figure 290: Event Response Details Page Search Filters

3. Optionally, further limit the scope of resource responses to be displayed by the system to only a specific **Zone, Aggregation** and/or **Status** by choosing the applicable option(s) from the corresponding search filter(s) near the top of the page.

4. Near the top of the Event Response Details page, click the **Display** button.

   The system populates the Resource Responses to Events grid below the search filters with an entry for each resource response meeting the criteria chosen at steps 2 and 3 (see Figure 291).

   > **Tip:** If the number of responses exceeds the space available in the grid, the program breaks the data set across separate pages, as reflected on the left side of the status bar. To navigate among multiple pages of resource enrollments, click the applicable button to either move forward one page (▶), move back one page (◀), move to the beginning of the data set (◀◀), or move to the end of the data set (▶▶).

Figure 291: Event Response Details Page Populated with Data

5. Optionally, view further details for a specific resource response by clicking the corresponding row in the Resource Responses to Events grid.

The system expands a two-pane frame at the bottom of the page, where additional event or test and response data in the form of *Event Information* are displayed on the left and *Hourly Meter Data, CBL Dates, and Hourly Billing Data* are displayed on the right (see Figure 292).

Figure 292: Event Response Details Page with Additional Details Visible
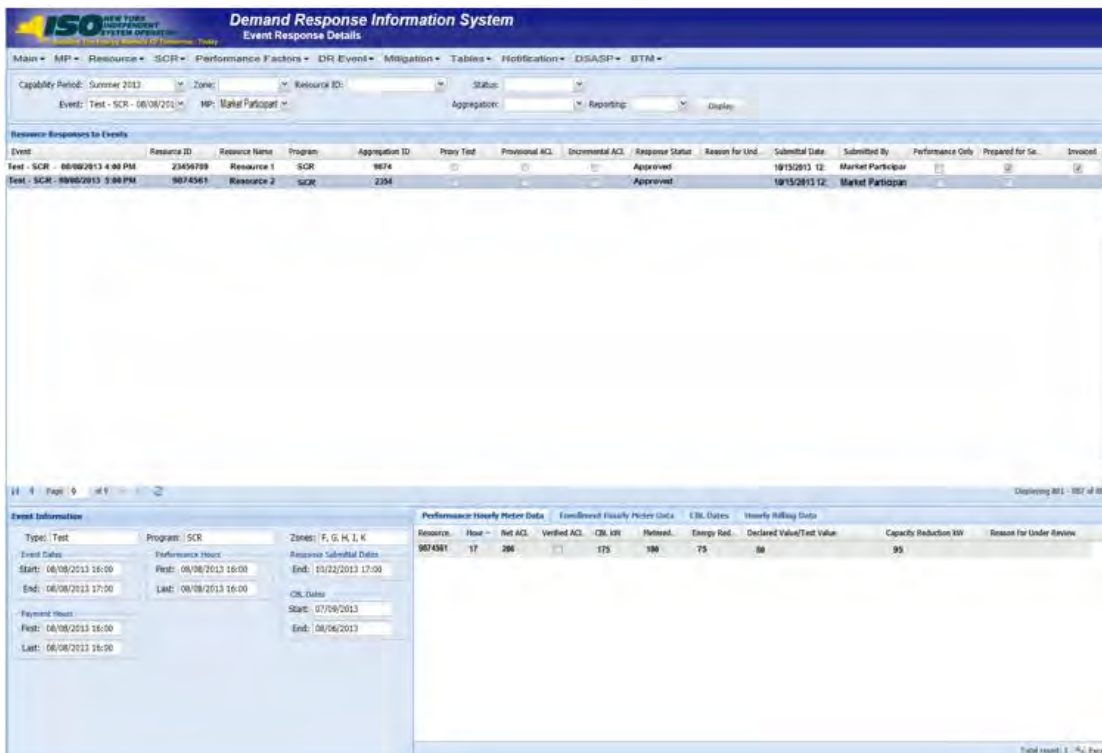
12.7.4.2. Viewing Hourly Resource Response Details

In viewing resource responses by detail, the MP can see comprehensive response data, including details pertaining to the specific event or test, broken down by resource for each hour of the event or test.

This data is visible in a two-pane frame at the bottom of the Event Response Details page, in the form of *Event Information* displayed on the left and *Hourly Meter Data, CBL Dates, and Hourly Billing Data* displayed on the right (see Figure 292).

The system displays the following Event Information for the selected event or test:

- Event type

- Program

- Zones including zonal percentages

- Event start date and time

- Event end date and time

- First hour of performance

- Last hour of performance

- First hour of payment

- Last hour of payment

- CBL date start date

- CBL date end date

- Response submittal end date

> **Note:** A null value displayed in the *First Hour of Performance* and the *Last Hour of Performance* indicates an event for which there was no day-ahead notice. The performance of SCR resources in an event for which there was no day-ahead notice will not be used in the calculations of the SCR resource performance factor. However, metered kW values are still required for all event hours on the event response import file when reporting resource data for event payments for an event for which there was no day-ahead notice.

Additionally, the system displays event- and resource-specific response data in tabular format. Beginning with the Summer 2011 Capability Period, SCR resource response data will include Average Coincident Load (ACL) for the resource as a result of the program change from the Average Peak Monthly Demand (APMD) baseline methodology to the ACL baseline methodology. SCR resource response date which uses APMD data will continue to be viewable to the MP for Capability Periods prior to Summer 2011.

- Performance Hourly meter data

  - Resource ID

  - Hour beginning of the event

  - Net APMD, which is the result of APMD less any Shutdown kW value (prior to Summer 2011)

- Net ACL, which is the result of ACL including any Shutdown kW value (Summer 2011 and greater) and Incremental ACL kW value (Summer 2014 and greater) or the Verified ACL kW for resources enrolled with a Provisional ACL or Incremental ACL for the period of the event selected
- Verified ACL indicator
- CBL kW value
- Metered kW
- Energy reduction kW
- Declared value
- Capacity Reduction kW
- Reason for under review

- Enrollment Hourly meter data
  - Resource ID
  - Hour beginning of the event
  - Net APMD, which is the result of APMD less any Shutdown kW value (prior to Summer 2011)
  - Net ACL, which is the result of ACL including any Shutdown kW value (Summer 2011 and greater) and Incremental ACL kW value (Summer 2014 and greater)
  - CBL kW value
  - Metered kW
  - Energy reduction kW
  - Declared value
  - Reason for under review

- CBL dates
  - Date
  - Included indicator

- Hourly billing data
  - Settlement kW
  - Zonal LBMP
  - Net energy payment

- Adjusted for program overlap indicator

- Con invoice version

> The *Enrollment Hourly Meter Data* tab will represent the primary view of event response data for the user until the window for importing Verified ACL data opens for the Capability Period of the event type selected. At this point, the *Performance Hourly Meter Data* tab representing updated meter data will become the primary view. For resources enrolled with a Provisional ACL or Incremental ACL for the month of the event selected, the value displayed in the **Net ACL** field will represent the Verified ACL of the resource and all capacity reduction calculations will be updated and based off of this value.

Pre-requisites

- The MP has imported resource responses to an event or test.

- The MP has logged in to DRIS, as outlined under section 1.3, "Accessing the System".

🖥 ***To view hourly resource response details by event***

1. From the **DR Event** menu, choose **Event Response Details**.

   The system displays the Event Response Details page.

2. From the corresponding search filter(s) in the uppermost frame on the Event Response Details page (see Figure 293), choose, at a minimum, the **Capability Period** and **Event** and/or the **Resource ID** for which the system should display resource responses.

Figure 293: Event Response Details Page Search Filters

3. Near the top of the Event Response Details page, click the **Display** button.

   The system populates the Resource Responses to Events grid below the search filters with an entry for each resource response meeting the criteria chosen at step 2 (see Figure 294).

Figure 294: Event Response Details Page Populated with Data

> **Note:** Upon initial import of the resources responses to events or tests file, DRIS will calculate the resource response data in the file which pass all validations. After performance factors are calculated for the following equivalent Capability Period resources which did not have event or test responses imported into DRIS may be identified, by utilizing the "Reporting" feature in the search criteria. Two options can be found in this filter, *"Failure to Report"* and *"Failure to Report for 2nd Test".*

4. View further details for a specific resource response by clicking the corresponding row in the Resource Responses to Events grid.

The system expands a two-pane frame at the bottom of the page, where additional event or test and response data in the form of *Event Information* are displayed on the left and *Performance Hourly Meter Data, Enrollment Hourly Meter Data, CBL Dates, and Hourly Billing Data* are displayed on the right (see Figure 295).

Figure 295: Event Response Details Page with Enrollment Hourly Meter Data Tab Enabled

To view additional tabular data provided by the system, click the *Performance Hourly Meter Data, CBL Dates* or *Hourly Billing Data* tab (see Figure 296 or Figure 297).

Figure 296: Event Response Details Page with Performance Hourly Meter Data Tab Enabled

Figure 297: Event Response Details Page with Hourly Billing Data Tab Enabled before the Verification

Window Opens and the Performance Hourly Meter Data Tab is Available

12.7.5. Monitoring Results of the Event Response Import

Upon completion of the event response import, each resource response receiving no exceptions on import will receive one of the following Response Statuses:

- Approved
- Under Review

The NYISO may also assign one of the following Response Statuses to an imported response record:

- Denied
- Approved
- Under Review

Responses with an Approved status reported for payment have completed all requirements for payment processing and require no further action by the MP. Responses with an Approved status reported for performance only have also completed all requirements for processing and require no further action by the MP.

Responses with an Under Review status, regardless of reporting for payment, performance, or both, require that further action be taken by the NYISO in evaluating the reported resource data. The reason(s) a specific resource response was placed under review can be found on the Event Response Details page (see Figure 298 and Figure 299).

Reasons for Under Review are shown at the response summary level, when applicable to the resource response as a whole, and at the hourly level, when applicable to only a specific hour(s) of the event response. Regardless of a record being placed under review for the entire resource response or only a specific hour(s), the resource response will not be processed for payment or performance until the response receives an Approved status by the NYISO.

Additionally, a resource response may receive a Denied status by the NYISO, which prevents the response from being processed for payment or performance.

Pre-requisites

▪ The MP has imported resource responses to an event or test.

▪ The MP has logged in to DRIS, as outlined under Section 1.3, "Accessing the System".

🖥 To view resource event response status

1. From the **DR Event** menu, choose **Event Response Details**.

   The system displays the Event Response Details page.

2. From the corresponding search filter(s) in the uppermost frame on the Event Response Details page (see Figure 298), choose, at a minimum, the **Capability Period** and **Event** and/or the **Resource ID** for which the system should display resource responses.

Figure 298: Event Response Details Page Search Filters

3. Near the top of the Event Response Details page, click the **Display** button.

The system populates the Resource Responses to Events grid below the search filters with an entry for each resource response meeting the criteria chosen at step 2 (see Figure 299).

Figure 299: Event Response Details Page Highlighting Response Status and Reason for Under Review
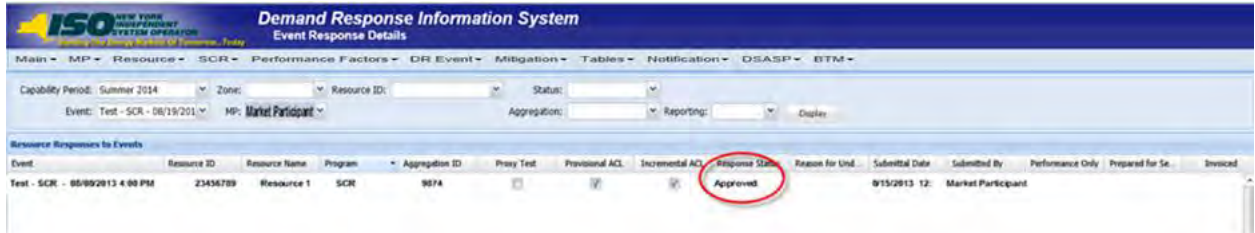
4. View the Response Status and summary level Reason for Under Review for a specific resource response in the Resource Responses to Events grid (see Figure 299).

5. View the hourly level Reason for Under Review by clicking the corresponding row in the Resource Responses to Events grid and viewing the displayed Hourly Meter Data tab (see Figure 300).

Figure 300: Event Response Details Page Highlighting Reason for Under Review at the Hourly Level on the Hourly Meter Data Tab
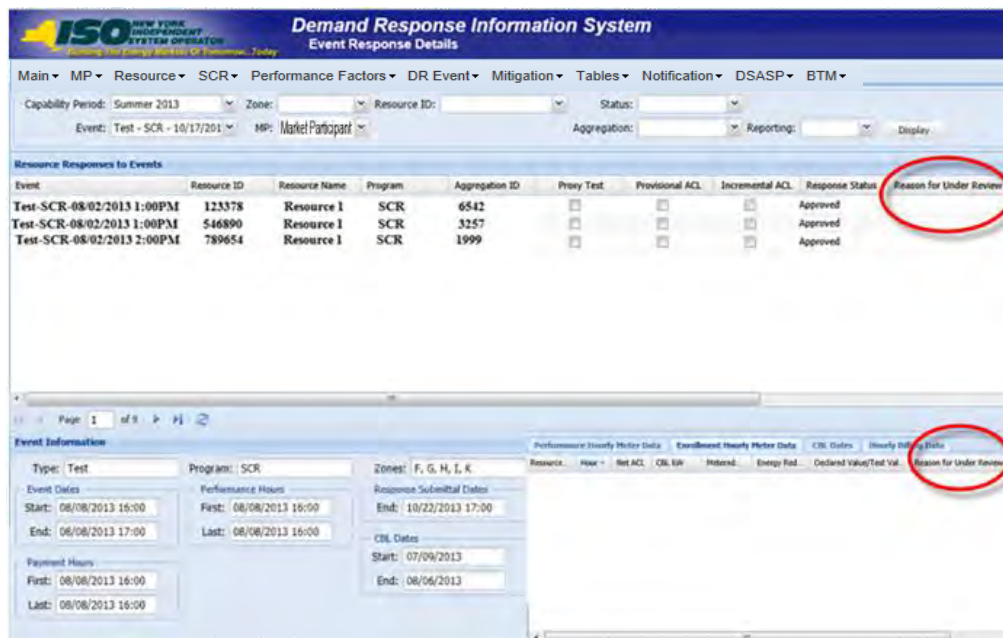
12.7.6. Monitoring Results of Event Responses Reported for Payment

Resource responses to an event or test reported for purposes of payment may be monitored at the summary or payment detail levels. The Resource Responses to Events summary view provides knowledge as to when a specific resource response record has been Prepared for Settlements by the NYISO and when the same record has been Invoiced by the NYISO Consolidated Invoice system.

The Hourly Billing Data view provides specific Payment Statuses as the resource response moves through the NYISO payment process. Payment Statuses that can be assigned to a resource response include the following:

- *Prepared for Settlements:* The event or test for which the resource response has been reported has been processed for payment by the NYISO and is waiting to be billed.

- *Billed:* The resource response has been processed by the NYISO settlement system, payment data is visible on the Billing Details tab in DRIS, and the response is waiting to be invoiced.

- *Invoiced:* The resource response has been processed by the NYISO Consolidated Invoice system, received an invoice number, and has completed the payment process.

- *Resettlement Copy:* A copy of the resource response has been made, post invoicing, for use in the event that the date of the event or test requires re-spinning by the NYISO payment process.

- *Pulled:* An updated resource response record for the resource, event, and MP has been Prepared for Settlements, causing an existing Prepared for Settlements, Billed, or Resettlement Copy to be pulled from the invoicing process and replaced with the newest version.

- *Canceled:* The resource response record has not yet reached the Billed stage of the payment process and has been removed from the payment process by the NYISO.

Pre-requisites

- The MP has imported resource responses to an event or test for payment.

- The MP has logged in to DRIS, as outlined under Section 1.3, "Accessing the System."

⌨ ***To view resource event response payment status***

1. From the **DR Event** menu, choose **Event Response Details**.

    The system displays the Event Response Details page.

2. From the corresponding search filter(s) in the uppermost frame on the Event Response Details page (see Figure 301), choose, at a minimum, the **Capability Period** and **Event** and/or the **Resource ID** for which the system should display resource responses.

Figure 301: Event Response Details Page Search Filters

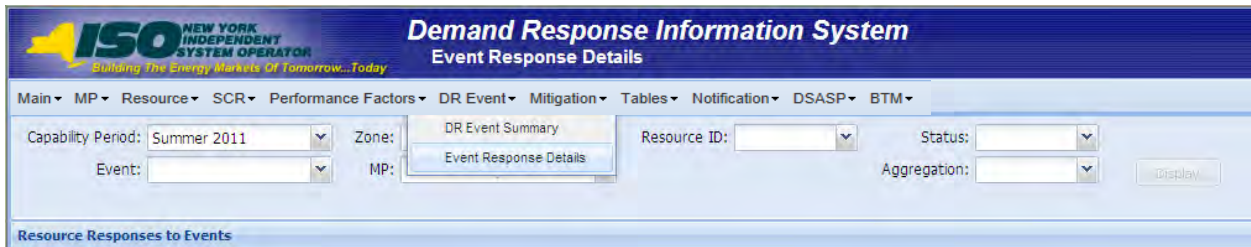3. Near the top of the Event Response Details page, click the **Display** button.

The system populates the Resource Responses to Events grid below the search filters with an entry for each resource response meeting the criteria chosen at step 2 (see Figure 302).

Figure 302: Event Response Details Page Highlighting Response Status Indicators

4. Note the summary level Prepared for Settlements indicator and Invoiced indicator for a specific resource response in the Resource Responses to Events grid (see Figure 302).

View the Payment Status on the Hourly Billing data tab by clicking the corresponding row in the Resource Responses to Events grid and then clicking the displayed **Hourly Billing Data** tab (see Figure 303).

Figure 303: Event Response Details Page Highlighting Response Status on the Hourly Billing Data Tab
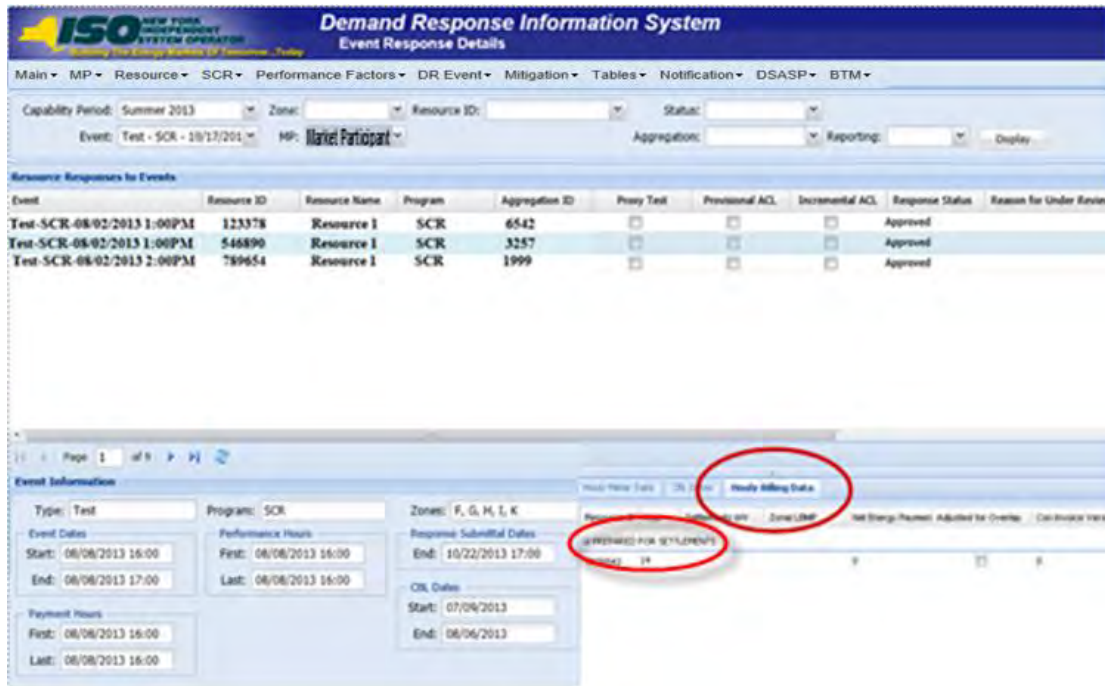
12.7.7. Downloading Energy Payment Details

Energy payment details are viewable via a download initiated from the DRIS Imports/Exports page. Payment details, based on reported and processed resource responses to an event or test, can be exported by selecting a specific event or test. Resource responses must have a Payment Status of Invoiced to appear on the energy payment export. The following data is provided for each resource on the energy payment export:

- Resource ID
- Resource name
- TO account number
- Aggregation ID
- Strike price
- Zone
- CBL MW for each event hour
- Load MW for each event hour
- Performance MW for each hour
- LBMP for each event hour

- LBMP payment for each event hour

- Total LBMP payment for the resource for the event

- Total BPCG payment for the resource for the event

- Total payment for the resource for the event

Pre-requisites

- The MP has imported resource responses to an event or test for payment.

- The resource responses for the event selected have been processed for payment and the responses have received a payment status of Invoiced.

- The MP has logged in to DRIS, as outlined under Section 1.3, "Accessing the System".

⌨ *To download Energy Payment details*

1. From the **Main** menu, choose **Imports/Exports**.

   The system displays the Imports/Exports page (see Figure 304).

Figure 304: Import/Export Page Showing Energy Payment Export Option
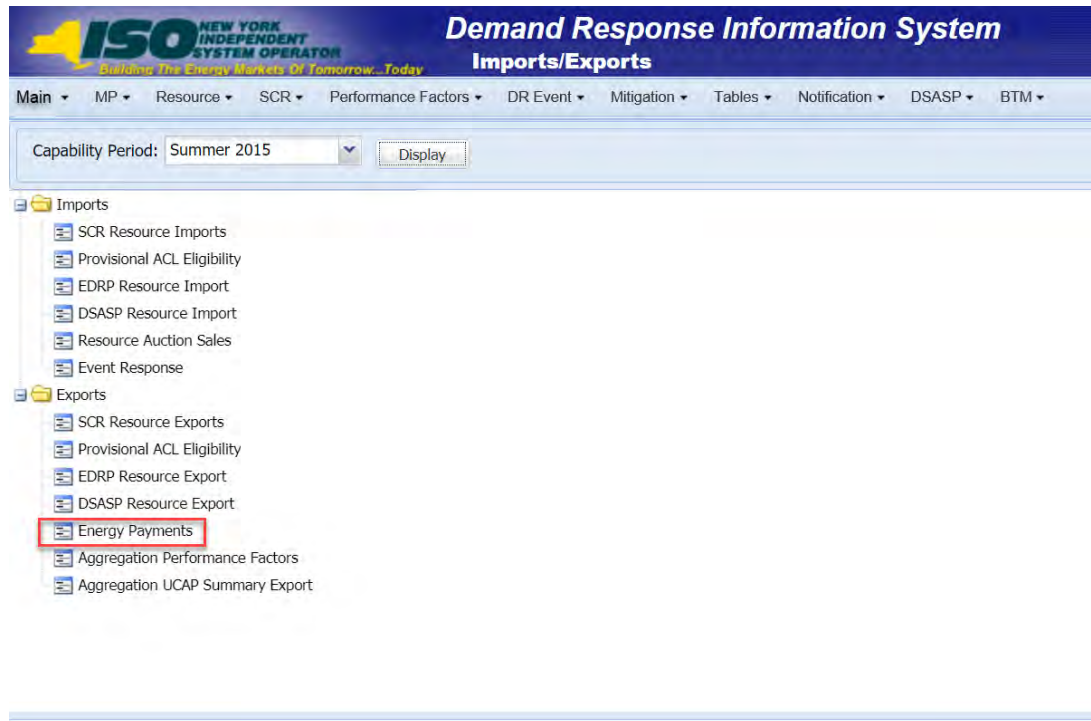
2. From the corresponding filter in the uppermost frame on the Imports/Exports page, choose the **Capability Period** encompassing the event or test for which Energy Payment values are to be downloaded.

3. Beside the Capability Period filter, click the **Display** button.

    The system makes available the middle frame.

4. Under the Exports heading in the left pane of the middle frame, choose **Energy Payments**.

    The system refreshes the right pane of the middle frame to display additional filters along with a button to initiate download of the file (see Figure 305).

Figure 305: Filters for Downloading an Energy Payment File
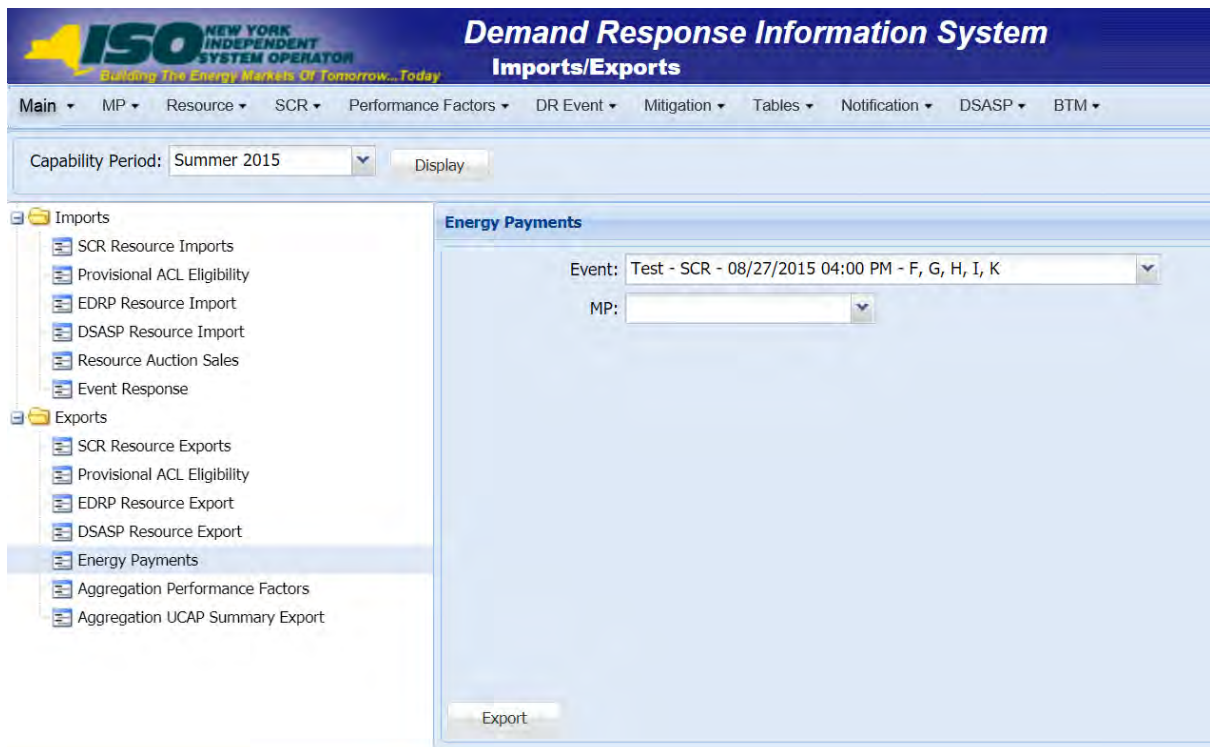
5.   From the corresponding filter in the right pane of the middle frame, choose the applicable **Event or Test**.

6.   Click the **Export** button, located in the lower-left corner of the right pane in the middle frame.

The system displays a dialog box via which the energy payment file can either be saved or opened.

7.   Take the requisite steps to either save or open the energy payment file.

The energy payment file for the chosen event or test is either saved to the designated location or displayed on screen.

> **Note:** If the energy payment file is saved, it is named according to the convention *EventPayments_[mm-dd-yyyy].csv*, where bracketed content is replaced with actual values to result in a file name such as *EventPayments_05-19-2010.csv*