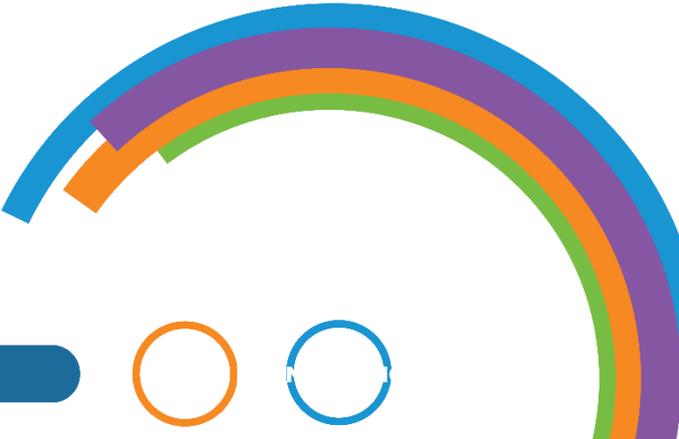




Customer and Asset Management System (CAMS) User Guide for Demand Asset and Demand Resource Maintenance

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MAY 5, 2025



About this user guide

The *Customer and Asset Management System (CAMS) User Guide for Demand Asset and Demand Resource Maintenance* is organized into standalone sections by topic. It is designed for quick reference rather than cover-to-cover reading. We recommend selecting a topic from the Table of Contents.



DISCLAIMER

- Company names and any numerical values are fictitious and are not associated with any actual market participant.
- Though we strive to maintain accuracy, this guide may not fully reflect the current CAMS production environment.

Figure 1. Disclaimer

Summary of Changes

Revision	Dates	Comments
Version 1.0	November 6, 2012	Initial release
Version 1.1	October 23, 2013	Screen shots updated for 2013 CAMS upgrade removed the index section
Version 2.0	June 1, 2018	Rewritten for new Demand Response Registration system implemented because of Price Responsive Demand.
Version 3.0	May 5, 2025	Updated for clarity and consistency, to reflect CAMS screen changes, and to include new guidance on registering residential passive aggregations.

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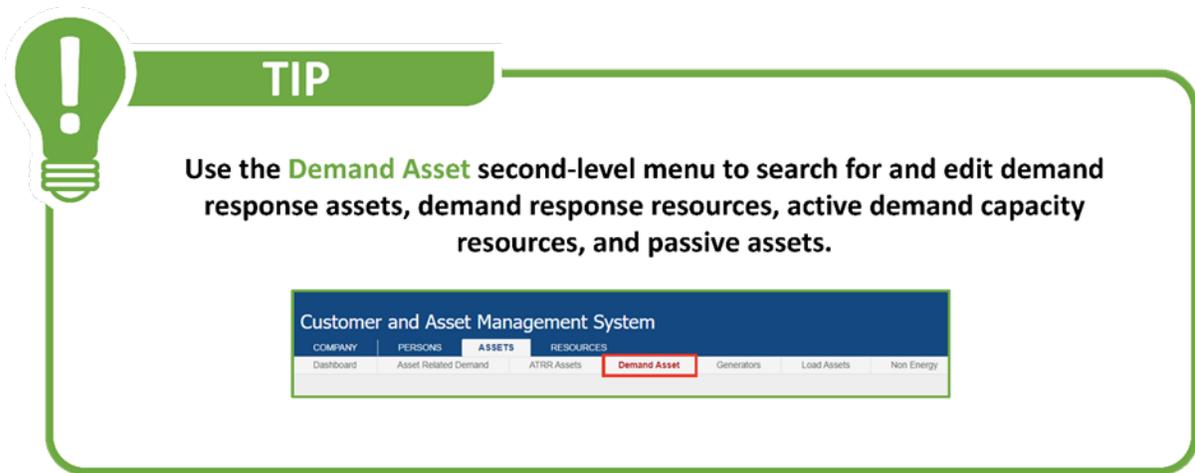
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1. Managing Demand Response Assets, Demand Response Resources and Passive Assets

This section of the guide explains the process for enrolling an active demand response asset or passive asset and mapping the demand response asset to a demand response resource and a passive asset to a capacity resource.



TIP

Use the **Demand Asset** second-level menu to search for and edit demand response assets, demand response resources, active demand capacity resources, and passive assets.

Customer and Asset Management System

COMPANY	PERSONS	ASSETS	RESOURCES
Dashboard	Asset Related Demand	ATR Assets	Demand Asset Generators Load Assets Non Energy

Figure 2. Tip for using CAMS menu

1.1. Overview of the Demand Asset Registration Process

The purpose of registration is to identify demand assets, including their location and characteristics, so they can be properly registered and eligible to participate in ISO New England-administered markets.

The lead market participant initiates the registration process for a demand asset in CAMS. Depending on the type of registration, some steps shown in Figure 3 and Figure 4 may not be needed. For instance, assets with on-site generation will need to provide generation information, while facilities without generation will skip this step and proceed to the next relevant screen.

Active Asset Registration Process

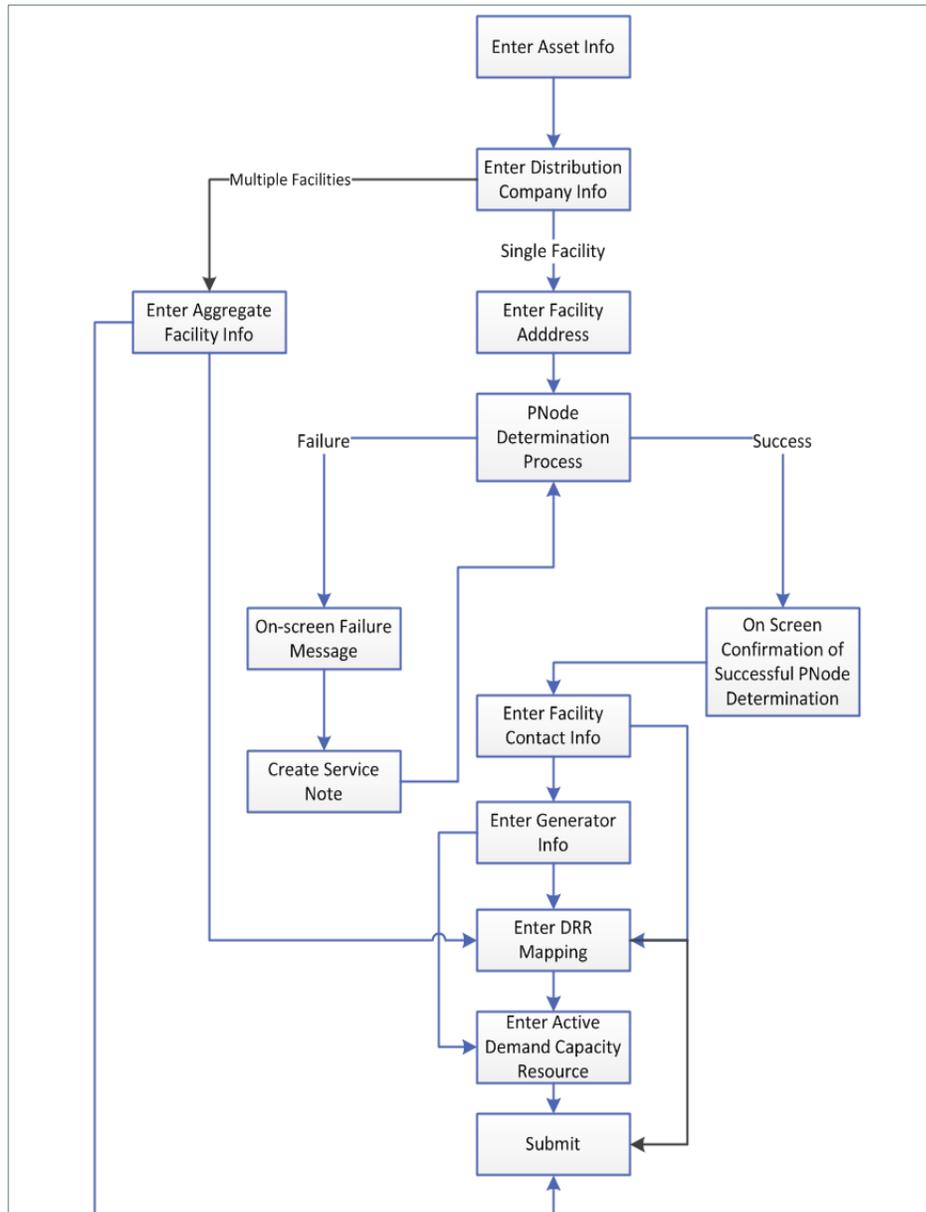


Figure 3. Flowchart of the Active Asset Registration Process

Passive Asset Registration Process

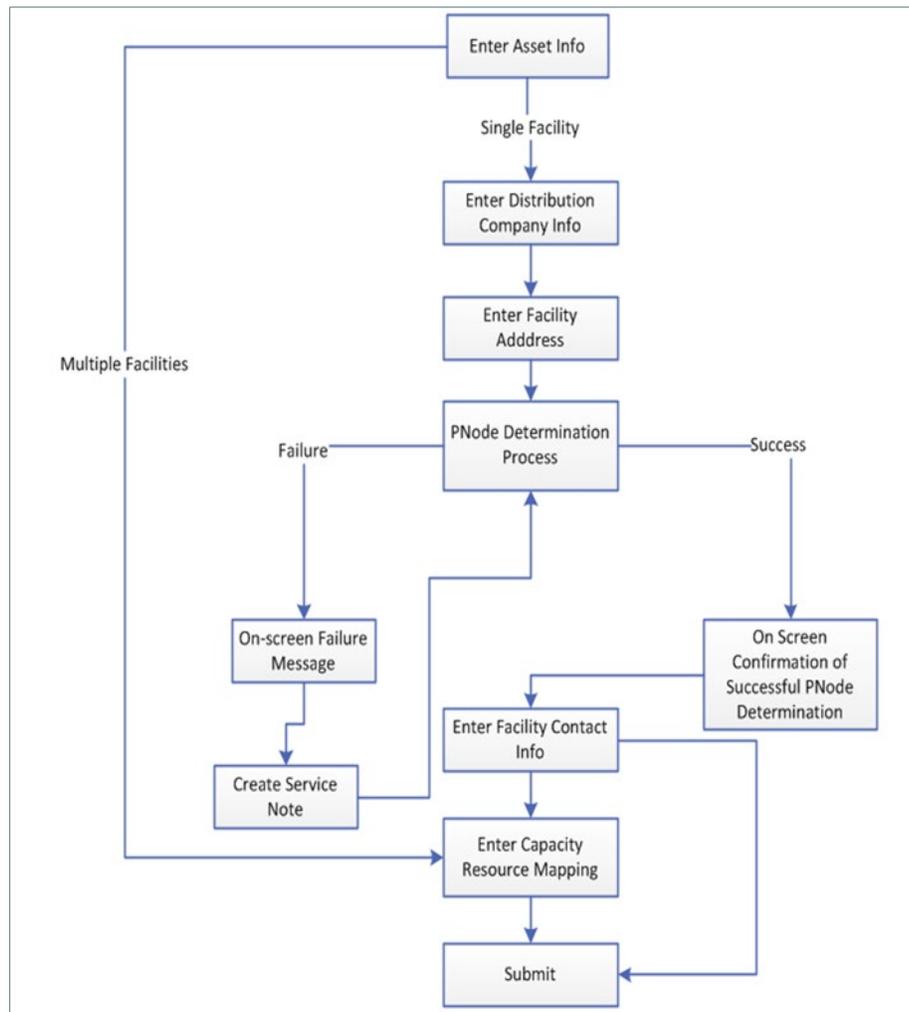


Figure 4. Flowchart of the Passive Asset Registration Process



NOTICE

Submission Deadlines for New Enrollments

To ensure your new enrollments are included in the next month's model, you must follow these procedures:

- Submit new enrollments at least 12 business days before the model cut deadline. Late submissions are not guaranteed to be approved before the 7-business day deadline.
- Enrollments submitted after 12:00 p.m. on the business day before the 7-business day deadline will not be approved and will not be included in the model for the following month.

Plan accordingly to avoid delays or missed approvals.

Figure 5. Notice of submission deadlines for new enrollments

1.2. Common Questions about Demand Asset Registration

How does a demand response asset (DRA) reach the approved state?

To achieve approved status, the following actions must be completed for a demand response asset (DRA):

- Provide a recent utility bill dated within six months of the registration date.
- Ensure the asset's meters are installed and operational by setting the Telemetry Installed and Operational flag to Yes.
- For active demand response assets, if the maximum interruptible capacity (MIC) exceeds 1 MW, the pricing node (pnode) must be verified by the distribution company, and the proof of verification must be uploaded to the service notes.
- Map the demand response asset (DRA) to a demand response resource (DRR).

The demand response asset (DRA) will not become operational or contribute to the demand response resource (DRR) until it achieves approved status.

How does a demand resource asset become operational for a day type?

To become operational for a specific day type, a demand response asset (DRA) must meet two conditions:

1. The demand response asset (DRA) must have a baseline established for that operating day type (non-holiday weekday, Saturday, or Sunday/holiday).
2. The demand response asset (DRA) must not be under curtailment for that day.

Once both conditions are met, the asset can be considered operational for the given day type.

How does a demand response resource become operational and included in the monthly communication model?

To become operational and included in the monthly communication model, a demand response resource (DRR) must meet two key criteria:

1. It must have at least one approved demand response asset mapped (DRA) with verified telemetry that is installed and operational.
2. The demand response resource (DRR) must be mapped to both a demand designated entity (DDE) and a remote terminal unit (RTU).



TIP

To view a list of demand response assets as of the selected date, click the **CSV Export** button at the bottom of the Asset Search Results screen. This will assist in verifying which asset(s) are approved and operational, and included in the monthly communication model.

Asset ID	Asset Name	Lead Participant (ID)	Asset Status	Effective	Dispatch Zone (ID)	Aggregation Zone (ID)	DRR (ID)	Oper
XXXXX	XXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX XXXXXXXX	APPROVED	MM/DD/YYYY XXXXXXXXXXXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	Y
XXXXX	XXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX XXXXXXXX	APPROVED	MM/DD/YYYY XXXXXXXXXXXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	Y
XXXXX	XXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX XXXXXXXX	APPROVED	MM/DD/YYYY XXXXXXXXXXXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	Y

CSV Export

Displaying 1 to 20 of 464

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Figure 6. Tip to view a list of demand response assets as of the selected date

1.3. Timeline for the Demand Asset Registration Process

Lead market participants must give ISO New England at least seven full business days to review new demand asset registration submissions.

The monthly communication check-out process starts seven calendar days before the first day of the upcoming month.

Demand response assets (DRA) and/or demand response resources (DRR) that do not meet the requirements by the start of the monthly check-out process will not be included in the communication model for that month. They will remain excluded from future models until all requirements are fulfilled.

1.4. Active Demand Response Asset Communication Front End/Remote Terminal Unit Model Timeline

This only applies to active demand response assets (DRA). The following tasks must be completed seven calendar days before the requested operational date:

- **Asset Approval.** ISO New England has seven business days to review a complete initial registration. If more information is needed from the lead market participant to finalize the review, ISO New England will have an additional seven business days to complete the review after receiving the required information.
- **Telemetry Installed and Operational.** Lead market participants are responsible for certifying that meters are installed and operational. Without this certification, the asset will not become operational and will not contribute to the performance of the demand response resource to which it is assigned.
- **Mapping a Demand Response Asset to a Demand Response Resource.** Lead market participants are responsible for mapping new demand response assets (DRA) to a demand response resource (DRR) in CAMS. They are also responsible for mapping the demand response resource (DRR) to a demand designated entity (DDE) in CAMS, see [4.2 How to Update a Demand Designated Entity \(DDE\) for a Resource](#). This mapping must occur *before* a demand designated entity (DDE) can map the demand response resource (DRR) to a remote terminal unit (RTU). For more information, see [4.3 How to Update a Remote Terminal Unit \(RTU\) for a Resource](#).
- **Building a baseline:**
 - An **Unadjusted Baseline** (UBL) is calculated daily for each demand response asset (DRA).

- The **non-holiday weekday baseline** is calculated as a 10-day average from the past 30 non-holiday weekdays. The most recent non-performance days are used first, followed by dispatch days, and, if necessary, curtailment days.
- The baseline methodology extends to two additional day types: **Saturday and Sunday/Holiday**. For these, a 5-day average is used with a maximum lookback period of 42 calendar days.
- **The baseline adjustment period** is shortened to three intervals that end before the dispatch instructions unless those intervals were part of a prior dispatch.
- A baseline **is not required** for a demand response asset (DRA) to enter the monthly model, but the demand response asset will not contribute to the performance of the demand response resource (DRR) until a baseline for that day type has been established.

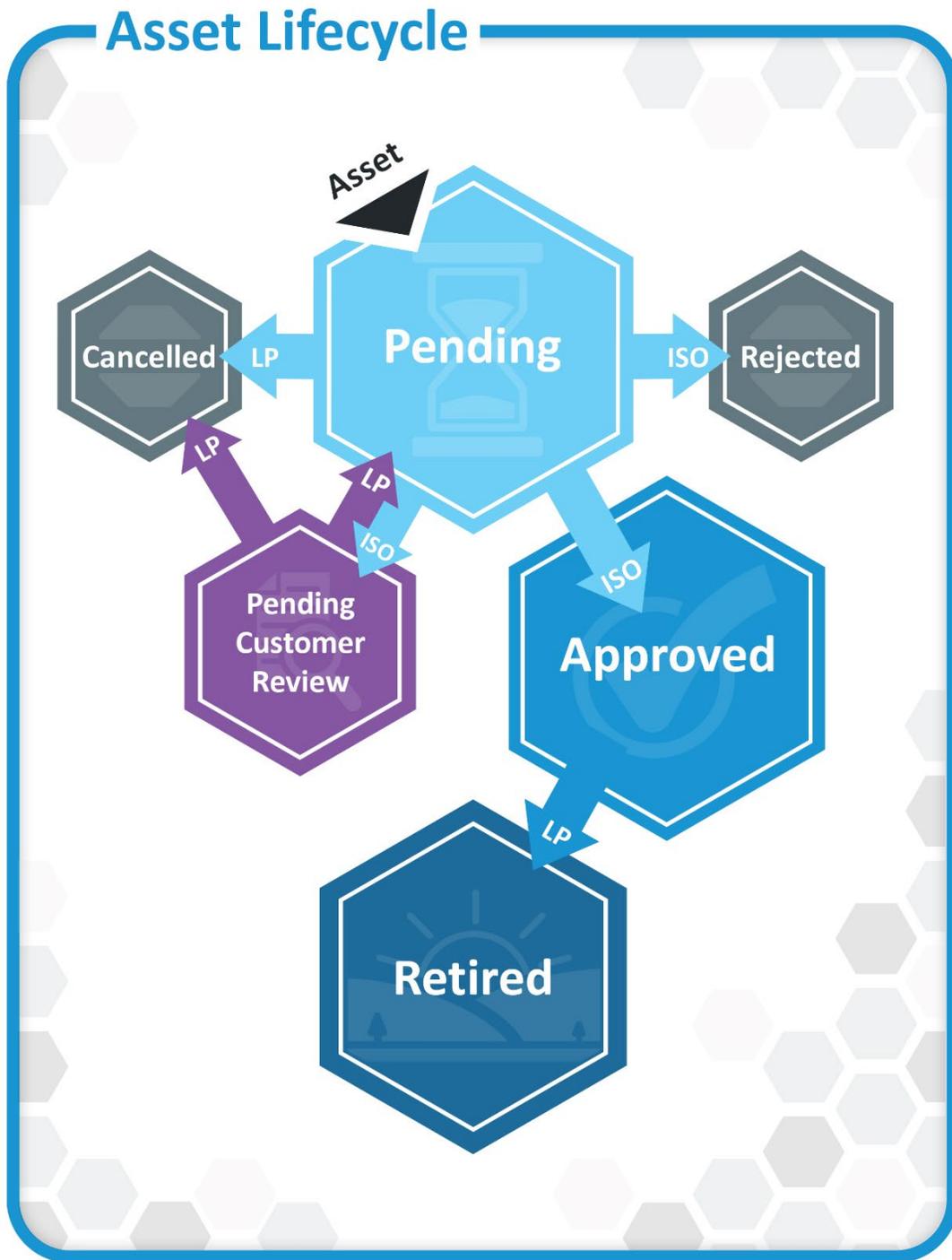


Figure 7. Asset Lifecycle

1.6. How to Enroll an Active Demand Response Asset

Users assigned the External Demand Asset Maintainer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second-level menu bar.
4. Click **+Enroll Active**.

The Enroll Active Asset screen will display.

Enroll Active Asset - Enter Asset Details

Asset Details

Requested Operational Date* #Facilities*

Asset Name* Lead Participant* M.I.C.* MW

Maximum Load* MW Synchronize to Grid? Maximum Net Supply* MW Telemetry Installed and Operational*

Next > Cancel

Figure 8. Enroll Active Asset - Enter Asset Details screen

5. For **Requested Operational Date** select a future date that is the *first date of the month*.
6. For **# Facilities**:
 - Select **Single** if the asset consists of **one** physical location. A utility bill dated within 6 months of registration is required for a single facility. [Skip to Step 14.](#)
 - Select **Multiple** if the asset consists of **two or more** physical locations.

The Aggregate Generation Details screen will appear.

Aggregate Generation Details

DRR Aggregation Zone (ID)*

Meter Issue

Aggregate Max Generation

One-minute Telemetry?*

Figure 9. Aggregate Generation Details

7. Select **DRR Aggregation Zone (ID)** from the drop-down menu.
8. For **Meter Issue**:
 - Select **Yes** if there is a meter issue with any of the sites in the aggregation.
 - Select **No** if there is not a meter issue with any of the sites in the aggregation.
9. For **Aggregate Max Generation** enter the total nameplate capacity across all sites being aggregated.
10. For **One-minute Telemetry**:
 - Select **Yes** if all sites in the aggregation *can* provide one minute telemetry.
 - Select **No** if all sites in the aggregation *cannot* provide one minute telemetry.

Enter DRR/ADCR Mapping Warning Message will appear.

Warning!The sum of the MIC and/or audited demand reduction for all the DRAs mapped to the DRR must be at least 1 MW before a new DRR is registered within the same DRR Aggregation Zone unless it meets the exception listed in market rule 1.

Figure 10. Enter DRR/ADCR Mapping Warning message

The DRR Mapping screen will appear.

DRR Mapping

Enter New DRR

No

DRR Name (ID)*

Figure 11. DRR Mapping screen

11. For Enter New DRR:

- Select **Yes** to create a new DRR.
- Select **No** if the asset will be mapped to an existing DRR. Select DRR Name (ID) from drop-down list.



TIP

An aggregate registration that has multiple facilities requires you to submit individual asset location information to the ISO. Please request a template for the required information via Ask ISO. The completed template should be attached to a Service Note.

Figure 12. Tip for aggregate registration with multiple facilities

12. Click **Submit**.

The Active Asset Details screen will appear.

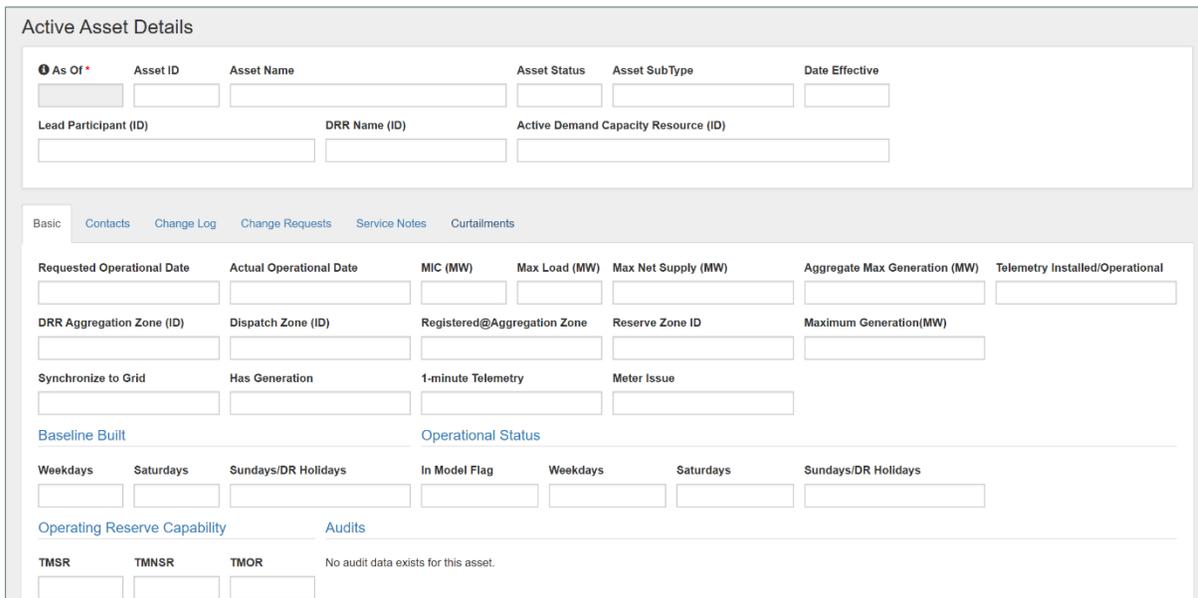


Figure 13. Active Asset Details screen

13. Click on the **Service Note** tab and follow the instructions in section [5.1. How to Create a Service Note](#) to attach the completed individual asset location information per Figure 13.

14. For **Asset Name** enter the name of the asset. The name must be 30 characters or less.

15. Select **Lead Participant** from the drop-down list.

16. For **M.I.C.** enter the Maximum Interruptible Capacity (MIC) in MW. The MIC must be:

- Greater than or equal to 0.010 MW.
- Less than or equal to the sum of the maximum load and maximum net supply.

17. For **Maximum Load** enter the value in MW. This value must not exceed 125% of the maximum load shown on the supporting utility bill.

18. For **Synchronize to Grid?:**

- Select **Yes** if there is generation at the facility and the generator can synchronize to the grid.
- Select **No** if there is no generation or if the generator cannot synchronize to the grid.

19. For **Maximum Net Supply** enter the allowed pushback value in MW, as specified in the generator(s) interconnection agreement.

20. For **Telemetry Installed and Operational:**

- Select **Yes** if all meters are installed, tested, and in working order.
- Select **No** if meters are not installed, not tested, and/or not in working order.

21. Click **Next**.

The Enter Distribution Company Details screen will display.

Distribution Company Details

Distribution Company State*

Distribution Company (ID)*

Retail Account ID*

Must conform to mask on right

< Previous Next > Cancel

Figure 14. Distribution Company Details screen

22. For **State** and **Distribution Company** select the state where the asset receives electrical service and the name of the distribution company providing that service from the drop-down menu.

23. For **Retail Account ID** enter the retail account ID number, which can be found on your utility bill. The correct format will be displayed to the right of the text box after selecting the distribution company.

24. Click **Next**.

The Enter Single Facility Address screen will display.

The screenshot shows a web form titled "Facility Address". It contains the following fields:

- Facility Name***: A single-line text input field.
- Address Line 1***: A single-line text input field.
- Address Line 2**: A single-line text input field.
- City***: A single-line text input field.
- State***: A single-line text input field.
- Zip***: A single-line text input field.

Figure 15. Facility Address screen

25. For **Facility** enter the *physical location* of the asset.

- Registration information must be *specific to the service address*, not the billing address.
- Data entered here will be used to determine the facility location (latitude and longitude) and the closest pricing node (pnode).
- Enter the facility details and click **Next** to standardize the address and trigger the pricing node determination process.

The Confirm Location Details screen will display.

Confirm Location Details

Based on the USPS standardized address, the closest PNode in the state is displayed below.
If you know or suspect that the displayed PNode is incorrect, please set **Suspect PNode** to **Yes** and provide a reason.

Asset Details

Requested Operational Date* #Facilities*
 Asset Name* Lead Participant* M.I.C.*
 Maximum Load* Synchronize to Grid? Maximum Net Supply* Telemetry Installed and Operational*

Facility Address

Facility Name*
 Address Line 1* Address Line 2*
 City* State* Zip*

USPS Standardized Use this

Address Line 1*
 Address Line 2*
 City* State* Zip*

PNode Details

DRR Aggregation Zone (ID)* PNode Verified*
 PNode (ID)* PNode Suspect*

Figure 16. Confirm Location Details screen

USPS Standardized Use this

Address Line 1*
 Address Line 2*
 City* State* Zip*

PNode Details

DRR Aggregation Zone (ID)* PNode Verified*
 PNode (ID)* PNode Suspect*

Figure 17. Close up of USPS Standardized and Pnode Details

26. The geocoding service will identify the closest pnode location within the state.

27. If the USPS standardization fails, uncheck the “use this” box.

28. For **PNode Verified**:

- Select **Yes** if the pnode *has been* verified by the distribution company for assets with an MIC of 1 MW or greater; or if the assets are under 1 MW and the pnode is not suspect.
- Select **No** if the pnode *has not* been verified by the distribution company or if it is suspected to be incorrect for the facility.

29. For **PNode Suspect**:

- If the pnode and location were *successfully determined*, select **No**.
- If you know or suspect the pnode *is incorrect*, select **Yes** and provide a reason in the **Suspect Reason** box. If known, enter the correct pnode.

The registration will be returned to ISO for review and the pnode will be updated accordingly. **The pnode must be determined before the asset can be approved.**

30. When all information is verified, click **Next**.

The Facility Details screen will display.

Enter Single Facility Details

Asset Details

Requested Operational Date* #Facilities*

Asset Name* Lead Participant* M.I.C.*

Maximum Load* Synchronize to Grid? Maximum Net Supply* Telemetry Installed and Operational*

Facility Details

One-minute Telemetry Meter Issue

Has Generation*

Utility Meter Numbers

+ Add

Facility Contact

First Name* Last Name*

Email*

Work Phone* Ext

< Previous Save Next > Cancel

Figure 18. Facility Details screen

31. For **One-minute Telemetry**:

- Select **Yes** if the asset can provide one-minute telemetry.
- Select **No** if it cannot.

32. For **Meter Issue**:

- Select **Yes** if there is a meter issue. The asset will not become operational if a meter issue exists.
- Select **No** if there are no meter issues.

33. For **Has Generation**:

- Select **Yes** if the facility has generation.
- Select **No** if it does not.

34. For **Max Generation** enter the **maximum generation capacity in MW** for the generator(s) located at the facility (including electrical storage), if applicable.

35. Click **+ Add** to enter the utility meter number. If there are multiple meter numbers, **click the plus sign** to add more.

Continue to the Facility Contact section.

Figure 19. Facility Contact screen

36. For **Facility Contact** enter the following details:

- First Name
- Last Name
- Email
- Work Phone (in the format ###-###-####)
- Extension (if applicable)

37. Click **Next**.

If the facility has generation, the Enter Generator Details screen will display.

Figure 20. Enter Generator Details screen

38. For **Generator Name** enter the name of the generator.

39. For **Max Generation** enter the maximum generation capacity in MW (the nameplate rating of the generator).

40. For **Generator Type** select the generator type from the list.

41. For **Fuel Type** select the corresponding fuel type from the list.

42. For **Controllable**:

- Select **Yes** if the generator is controllable.
- Select **No** if it is not controllable.

43. If there are multiple generators (including electrical storage) at the facility, **click the plus sign** to add them.

44. Click **Next**.

The DRR Mapping screen will display.

Figure 21. DRR Mapping screen

45. For **Enter New DRR**:

- Select **Yes** to create a new DRR. Only create a new DRR if existing DRRs have assets totaling 1 MW of MIC or the asset MIC is 5 MW or greater.
- Select **No** to choose an existing DRR from the list.

46. For **DDE Name (ID)** select the DDE Name (ID) from the list.

47. For **Active Capacity Demand Resource (ID)** (optional) select the relevant active capacity demand resource (ID) from the list.

48. Click **Submit** to complete the registration.

A success message will appear, and the registration will be submitted to ISO for review. To find the asset ID for the new asset, refer to the display as shown below.

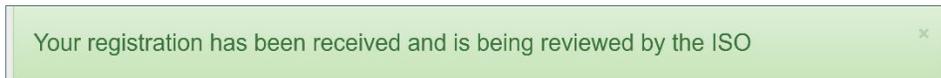


Figure 22. Example of a success message

1.7. How to Enroll a Passive Asset

Users assigned the External Demand Asset Maintainer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second-level menu bar.
4. Click **+Enroll Passive**

The Enroll Passive Asset – Enter Asset Details screen will display.

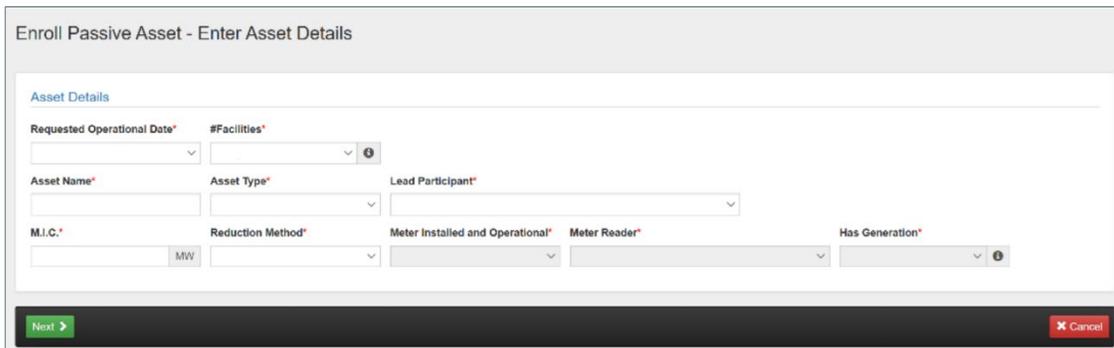


Figure 23. Enroll Passive Asset - Enter Asset Details screen

5. For **Requested Operational Date** select a future date that is the first day of the month.
6. For **Facilities**:
 - Select **Single** if the asset consists of **one** physical location. A utility bill dated within 6 months of registration is required for single facilities.
 - Select **Multiple** if the asset consists of **two or more** physical locations.



TIP

An aggregate registration that has multiple facilities requires you to submit individual asset location information to the ISO. Please request a template for the required information via Ask ISO. The completed template should be attached to a Service Note.

Figure 24. Tip for aggregate registration with multiple facilities

7. For **Asset Name** enter the name of the asset. The name must be 30 characters or less.
 8. For **Asset Type** select one:
 - On-Peak Demand Resource
 - Seasonal Peak Demand Resource
 9. For **M.I.C.** enter the maximum interruptible capacity (MIC) in MW.
 10. For **Reduction Method** select one:
 - Distributed Generation
 - Load Management
 - Energy Efficiency
- (If the facility type is Multiple, click **Next** and [skip to step 26.](#))
11. For **Meter Installed and Operational**:
 - Select **Yes** if all meters are installed, tested, and in working order.
 - Select **No** if meters are not installed, not tested, and/or not in working order.
 12. For **Has Generation**:
 - Select **Yes** if the facility has generation.
 - Select **No** if it does not.
 13. Click **Next**.

The Distribution Company Details screen will display.

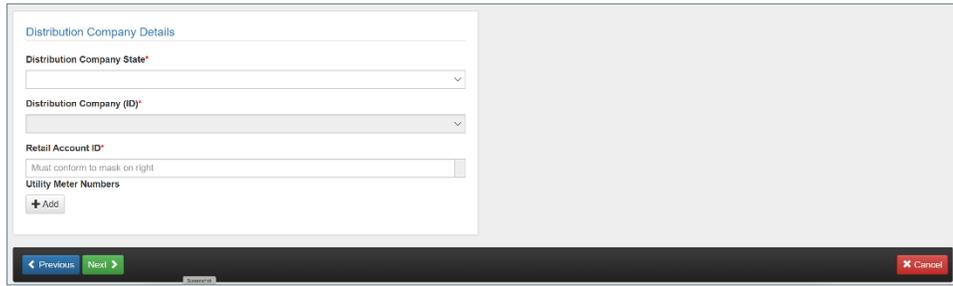
The screenshot shows a web form titled "Distribution Company Details". It contains four main input sections: "Distribution Company State" with a dropdown menu, "Distribution Company (ID)" with a dropdown menu, "Retail Account ID" with a text input field and a note "Must conform to mask on right", and "Utility Meter Numbers" with a text input field and a "+ Add" button. At the bottom, there are three buttons: "Previous" (with a left arrow), "Next" (with a right arrow), and "Cancel" (with a red 'X').

Figure 25. Distribution Company Details screen

14. For **Distribution Company State** and **Distribution Company (ID)** select the state where the asset receives electrical service and the name of the distribution company providing that service from the drop-down menu.
15. For **Retail Account ID** enter the retail account ID number, which can be found on the utility bill. The correct format will be displayed to the right of the text box after selecting the distribution company.
16. Click **Next**.

The Facility Address screen will display.

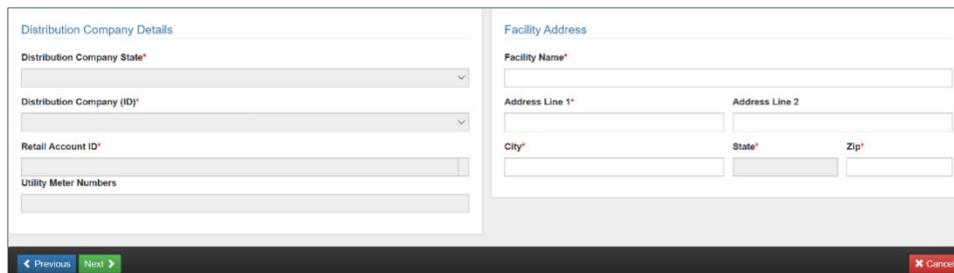
The screenshot shows a web form titled "Facility Address". It contains six input fields: "Facility Name" (a single line), "Address Line 1" and "Address Line 2" (two lines), "City", "State", and "Zip" (three separate fields). At the bottom, there are three buttons: "Previous" (with a left arrow), "Next" (with a right arrow), and "Cancel" (with a red 'X').

Figure 26. Facility Address screen

17. For **Facility** enter the *physical location* of the asset.
 - Registration information must be *specific to the service address*, not the billing address.
 - Data entered here will be used to determine the facility location (latitude and longitude) and the closest pricing node (pnode).

The Confirm Location Details Screen will appear.

Figure 27. Confirm Location Details screen

18. Enter the facility details and click **Next** to standardize the address

19. For **Load Zone Suspect**:

- If you know or suspect the load zone *is incorrect*, select **Yes** and provide a reason in the **Suspect Reason** box. If known, enter the correct load zone. Click **Submit**. The registration will be returned to ISO for review and the load zone will be updated accordingly.
- If the load zone was *successfully determined*, select **No** and click **Next**.

The Enter Single Facility Details screen will appear.

Figure 28. Insert Single Facility Details screen

20. For **Synchronize to Grid?**:

- Select **Yes** if a generator at the facility can synchronize to the grid.
- Select **No** if there is no generation or if generation cannot synchronize to the grid.

21. For **Max Generation** enter the **maximum generation capacity in MW** for the generator(s) located at the facility (including electrical storage).

22. For **Maximum Net Supply** enter the allowed pushback value in MW, as specified in the generator(s) interconnection agreement.

23. Click **+ Add** to enter the utility meter number. If there are multiple meter numbers, **click the plus sign** to add more.

24. For **Maximum Load** enter the value in MW. This value must not exceed 125% of the maximum load shown on the utility bill.

25. Click **Next**

The Map Asset to Demand Capacity Resource screen will display.

Asset Details

Requested Operational Date* #Facilities*
Asset Name* Asset Type* Lead Participant*
M.I.C.* Reduction Method* Meter installed and Operational* Meter Reader* Has Generation*

Capacity Resource Mapping

Capacity Resource (ID)*

Distribution Company Details

Distribution Company State*
Distribution Company (ID)*
Retail Account ID*
Utility Meter Numbers

Facility Address

Facility Name*
Address Line 1* Address Line 2*
City* State* Zip*

USPS Standardized Use this

Address Line 1*
Address Line 2*
City* State* Zip*

Location Details

Load Zone (ID)*
PNode (ID)*
Suspect Load Zone*

Facility Details

Synchronize to Grid?
Max Net Supply* MW
Max Load* MW

Facility Contact

First Name* Last Name*
EMail*
Work Phone* Ext

[Previous](#) [Submit](#) [Cancel](#)

Figure 29. Capacity Resource Mapping screen

26. Select **Capacity Resource** from the list.
27. Click **Submit** to complete the registration.

A success message will appear, and the registration will be sent to ISO for review.

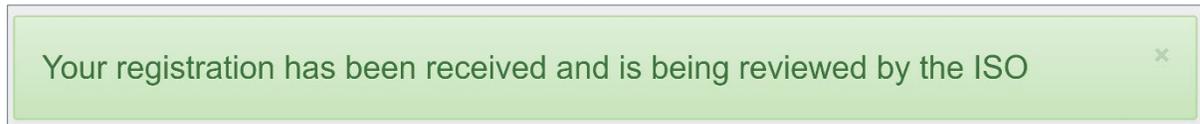


Figure 30. Example of success message

To find the Asset ID for the new asset, refer to the display as shown below.

The screenshot shows a web application interface. At the top, a green notification bar reads "Your registration has been received and is being reviewed by the ISO". Below this is a navigation menu with links for Dashboard, Change Request Search, Active Asset Search, Passive Asset Search, DRR Search, RTU Search, PNode Lookup, and DRI. There are also buttons for "Enroll Active" and "Enroll Passive". The main section is titled "Active Asset Details" and contains a form with the following fields:

As Of *	Asset ID	Asset Name	Asset Status	Asset Sub Type	Date Effective
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lead Participant (ID)	DRR Name (ID)	Active Demand Capacity Resource (ID)			
<input type="text"/>	<input type="text"/>	<input type="text"/>			

Figure 31. Active Asset Details screen

1.8. How to Search for or View an Asset

Users assigned to the External Demand Asset Maintainer, External Demand Asset Viewer, External Host Participant Viewer, or the External Meter Reader Viewer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second-level menu bar.
4. Select **Active Asset Search**, **Passive Asset Search** or **DRR Search**.
5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click an **Individual Asset ID** or **DRR ID** to view the full record.

The screenshot displays the 'Active Asset Search' interface. At the top, there is a navigation bar with tabs for 'Dashboard', 'Change Request Search', 'Active Asset Search' (selected), 'Passive Asset Search', 'DRR Search', 'RTU Search', 'PNode Lookup', and 'DRI'. On the right side of the navigation bar, there are links for '+ Enroll Active' and '+ Enroll Passive'. Below the navigation bar is a search form with the following fields:

- As Of:
- Asset ID:
- Asset Name:
- Asset Status:
- Facility Type:
- DRR Name (ID):
- ADCR Name (ID):
- DRR Aggregation Zone (ID):
- Reserve Zone:
- DRR Status:
- Dispatch Zone:
- PNode (ID):
- Operating Reserve Capability:
- Duplicate Address:
- Co-Located:
- Meter Issue:
- Operational Status:
- Curtailment Type:
- Curtailment Status:
- Curtailment Date Range: Start End

At the bottom right of the form, there are two buttons: 'Reset' and 'Submit'.

Figure 32. Active Asset Search screen

1.9. How to Update an Asset

Users assigned to the External Demand Asset Maintainer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second-level menu bar.
4. Select **Active Asset Search** or **Passive Asset Search**.
5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click an individual asset ID to view the full record.

The Active Asset Details or Passive Asset Details screen will display.

Dashboard Change Request Search Active Asset Search Passive Asset Search DRR Search RTU Search PNode Lookup DRI + Enroll Active + Enroll Passive

Active Asset Details

As Of* Asset ID Asset Name Asset Status Asset SubType Date Effective

Lead Participant (ID) DRR Name (ID) Active Demand Capacity Resource (ID)

Basic Facility Contacts Change Log Change Requests Service Notes Curtailments

Requested Operational Date Actual Operational Date MIC (MW) Max Load (MW) Max Net Supply (MW) Telemetry Installed/Operational

DRR Aggregation Zone (ID) Dispatch Zone (ID) Registered@PNode Reserve Zone ID Maximum Generation(MW)

Synchronize to Grid Has Generation 1-minute Telemetry Meter Issue

Baseline Built Operational Status

Weekdays Saturdays Sundays/DR Holidays In Model Flag Weekdays Saturdays Sundays/DR Holidays

Operating Reserve Capability Audits

TMSR TMNSR TMOR Summer (MW) Winter (MW)

Update Asset Update DRR Mapping + Map to New DRR Retire Asset

Figure 33. Asset Details screen

8. Click **Update Asset**.

9. For **Date Effective** enter the date the changes are effective. Click **Submit**.

The Active Asset Detail or Passive Asset Detail screen will display.

10. Update the applicable information. Greyed out fields cannot be updated for the selected effective date.

11. Click **Submit**.

A success message will appear, and the request will be sent to ISO for review.

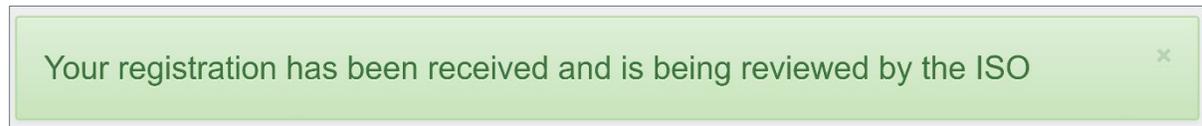


Figure 34. Example of success message

2. Managing Aggregated Residential Passive Demand Response Assets

An aggregated residential passive asset consists of multiple residential solar and/or battery storage installations within the same load zone, all served by the same distribution company. These installations must meet the criteria for a passive demand capacity resource, specifically an on-peak demand resource.

Once aggregated, these individual solar and/or battery installations are registered as a single asset in ISO systems.

An approved Measurement & Verification (M&V) Plan must be in place for the Demand Capacity Resource(s) the aggregated assets will be mapped to. Please verify an approved M&V Plan is in place prior to registering the asset(s).

2.1. How to Complete the Aggregated Residential Passive Asset Template

When completing the Aggregated Residential Passive Asset template (see Figures 35 and 36 for examples), ensure the following for each listed installation:

- Group installations by six-month periods based on their commercial operation dates.
- Choose the appropriate technology type.
- Ensure all installations are within the same load zone and served by the same distribution company.
- Each installation must have a unique utility retail account ID, with no duplicates from this or previous submissions.

Steps:

1. Click on the [Aggregated Residential Passive Asset Template](#) link.
2. Click the **Download file** button.
3. Click **Save As** and choose a file name and location that will make the file easy to find later.
4. If the template does not automatically open, open the file.

5. For the **Distribution Company Name** enter the name of the utility company that serves the area where all the installations are located.
6. For the **Technology Type** choose Solar, Battery Storage, or Hybrid Solar/Battery. If Hybrid Solar/Battery is chosen, the Hybrid tab will be completed for each Hybrid installation.
7. For **Load Zone** enter the load zone where all the listed installation addresses are located.
8. For **Asset Number in Aggregation Series** enter the two-digit sequential number assigned to each asset in the aggregation series. This number represents a new set of installations within a six-month period that are also located within the same load zone and served by the same distribution company.
9. For the **Data as of Date** enter the date when the installation data was finalized and submitted to the ISO.
10. For **Name** enter the identifier assigned to the installation by the lead market participant or utility. If no identifier is available, you may leave this field blank.
11. For **Address, City, State, and Zip Code** enter the full address of the installation location.
12. For the **Utility Account** enter the unique retail account ID for the installation.
13. For **Max Interruptible Capacity (MIC)** enter an estimate of the maximum demand reduction and net supply that the demand response asset can provide, measured at the retail delivery point. If the asset is hybrid, list the sum of all components Breakdown of all components will be listed on the Hybrid tab.
14. For **Nameplate Capability** enter the generator installation's rated capacity as a measure of its ability to produce electricity. If the asset is hybrid, list the sum of all components Breakdown of all components will be listed on the Hybrid tab.
15. For **Commercial Operation Date** enter the in-service date of the installation, as listed on the Permission to Operate Letter. If the asset is hybrid, list the earliest commercial operation date. Each component's commercial operation date will be listed on the Hybrid tab.

Aggregated Residential Passive Asset Template								
Distribution Company Name	NSTAR							
Technology Type	Hybrid Solar/Battery							
Load Zone	WCMA							
Asset Number in Aggregation Series	1							
Data As Of Date	3/1/2025							
General Facility Information								
Generation Facility						Unit Capacity	Commercial Operation Date	
Name (for Lead Participant/Utility use) - Optional	Address	City	State	Zip Code	Utility Account	MIC (Max Interruptible Capacity)	Nameplate Capability (MW)	mm/dd/yyyy
111-1144	1 MAIN STREET	WORCESTER	MA	1608	4444-2222	2	2	3/1/2025
<i>(add additional rows as needed)</i>						2	2	

Figure 35. Example of a completed entry in the Aggregated Residential Passive Asset Template

16. If completing the Hybrid Only tab:

- a. **Generation Facility Information** should match data as found on Sheet 1 of the workbook.
- b. For **MIC Battery Only** enter an estimate of the maximum demand reduction and Net Supply that a Demand Response Asset can deliver, as measured at the Retail Delivery Point.
- c. For **Nameplate Capability Battery Only** enter the rating of the generator installation as a measure of its ability to produce electricity.
- d. For **MIC Solar Only** enter an estimate of the maximum demand reduction and Net Supply that a Demand Response Asset can deliver, as measured at the Retail Delivery Point.
- e. For **Nameplate Capability Solar Only** enter the rating of the generator installation as a measure of its ability to produce electricity.
- f. For **MIC Hybrid** the workbook will sum the values for each component. This is the value that should be populated on Sheet 1.

2.2. How to Complete Initial Registration for an Aggregated Residential Passive Demand Response Asset

Gather the necessary documents:

- A **representative utility bill**. The bill should be in the same load zone, have the same distribution company and match the residential installations comprising the asset. This same utility bill will be used for each additional asset registered by the Participant in the same load zone and with the same distribution company that make up one aggregation series. This allows the ISO to identify the assets as being linked in CAMS.
- A **sample contract** is only necessary if this is the first aggregated residential passive asset enrollment for a participant. The sample contract can be a blank version with no customer information provided.
- A **completed aggregated residential passive asset template**. A blank copy can be found on the [ISO-NE website](#). See [2.1. How to Complete the Aggregated Residential Passive Asset Template](#).
- **Explanations of specific value calculations**. An explanation of how the maximum interruptible capacity (MIC), maximum generation, maximum, and maximum net supply are calculated will need to be uploaded to the asset's service notes. These explanations can be generic (not inclusive of specific numbers) and therefore can be applied to other registrations of this type that use the same calculations. Put these explanations in a PDF or document file to make it easier to upload into a service note for future registrations.
- **Measurement and verification plan** shall be submitted for an on peak demand resource or seasonal peak demand resource as part of the qualification process for the Forward Capacity Auction (FCA) pursuant to the requirements of Section III.13.1.4.3 of [Market Rule 1](#) and the [ISO New England Manuals](#). (ISO New England Inc. Transmission, Markets, and Service Tariff, Section 1, 2022, p 58-59). If your measurement and verification plan is not readily accessible, you may provide an explanation of how the meter data will be collected for this aggregation as a whole and submitted for every hour of every month, via the asset's service notes.

- **Other supporting documentation** that will be helpful for the ISO’s review of the registration (e.g., a document that was used when calculating certain values associated with the asset).

Steps:

1. Launch CAMS
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second-level menu bar.
4. Click **+Enroll Passive**

The Enroll Passive Asset – Enter Asset Details screen will display.

Figure 37. Enroll Passive Asset - Enter Asset Details screen

5. For **#Facilities** choose **Single** from the dropdown menu.
6. For **Asset Name** enter the name in the format: “(Asset Name) nn,” where "nn" is a two-digit sequential number starting with 01. This number should increase for each new asset of this type that the participant registers. If are registering assets across multiple load zones, reset the number sequence to start at 01 each time the load zone changes (for example, NEMA 01, NEMA 02, then SEMA 01, SEMA 02). If the registering battery and solar components as separate assets, include “PV” or “BESS” in the Asset Name (for example, NEMA PV 01, NEMA BESS 01)
7. For **Asset Type** enter **On-Peak Demand Resource**.
8. For **Lead Participant** select the one from the drop-down menu.
9. For **M.I.C.** enter the value matching the one on the completed Aggregated Residential Passive Asset Template.

10. For **Reduction Method** enter **Distributed Generation**
11. For **Meter Installed and Operational** select **Yes** from the drop-down.
12. For **Has Generation** select Yes from the drop down
13. Click **Next**

The Enter Distribution Company Details screen will display.

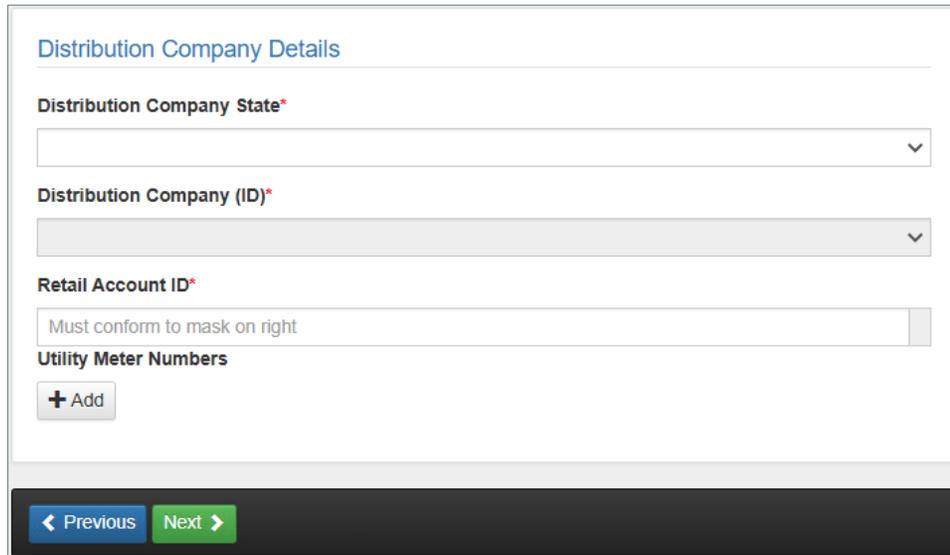


Figure 38. Distribution Company Details screen

14. For **Distribution Company State** choose the state that appears on the utility bill from the drop-down menu.
15. For **Distribution Company (ID)** choose the Distribution Company that appears on the utility bill from the drop-down menu.
16. For **Retail Account ID** enter the ID as it appears on the utility bill followed by the same two-digit number from the asset name in step 6.
17. Click **Next**.

The Enter Single Facility Address screen will appear.

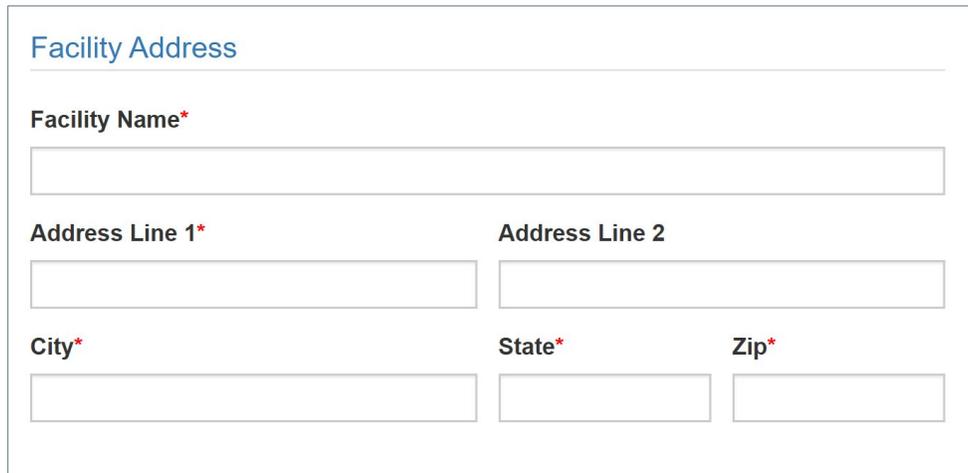


Figure 39. Facility Address screen

18. For **Facility Address** enter the address exactly as it appears on the utility bill and ensure it is an address in the correct load zone.

19. Click **Next**.

The Confirm Location Details screen will display.

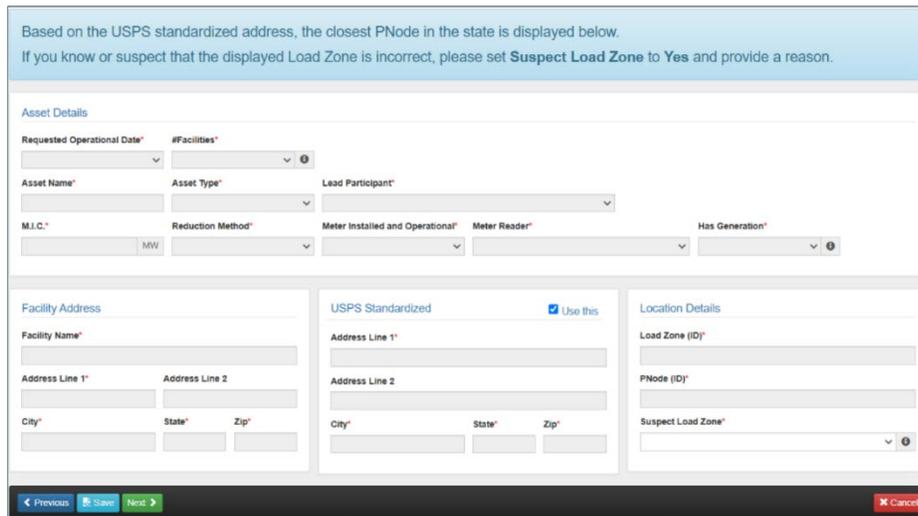


Figure 40. Location Details screen

20. **Use this** should have a check mark.

21. **Suspected Load Zone** should be **No**
22. Click **Next**.

The Enter Single Facility Details screen will appear.

Figure 41. Enter Single Facility Details screen

23. For **Synchronize to Grid** select **Yes** from the dropdown menu
24. For **Max Net Supply** enter the value provided in the explanation of how it was calculated.
25. For **Max Load** enter the value provided in the explanation of how it was calculated.
26. For **Facility Contact** enter the contact information for the Lead Participant
27. Click **Next**.

The Enter Generator Details screen will appear

Generator Name*	In Service Date*	Max Generation*	Generator Type*	Fuel Type*	Controllable*
<input type="text"/>	<input type="text" value="In Service Date"/>	<input type="text" value="Max Generation"/> MW <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="No"/>

Figure 42. Generator Details screen

28. For **Generator Name** enter the asset's name.
29. For **In Service Date** enter the earliest commercial operation date on the aggregated residential passive asset file. This date must fall after the New Capacity Qualification Date of the Demand Capacity Resource per [Market Rule-1, III.13.1.10](#).
30. For **Max Generation** enter the value provided in the explanation of how it was calculated.
31. For **Generator Type** select **Photovoltaic** from the drop-down menu. if asset is solar only or hybrid solar/battery and solar is front facing. Select **Energy Storage** if the asset is battery only or hybrid solar battery and the battery is front facing.
32. For **Fuel Type** select **Solar, Energy Storage (Battery) or Hybrid Solar/Battery** from the drop-down menu based on asset type.
33. For **Controllable** select **No** from the drop-down menu if the asset is solar only. Select **Yes** if the asset is battery only or hybrid solar/battery.
34. Click **Next**.

The Map Asset to Demand Capacity Resource screen will appear.

Figure 43. Capacity Resource Mapping screen

35. The selected Capacity Resource (ID) must meet two criteria:

- a. It must have qualified as a Distributed Generation measure type.
- b. The residential installation's commercial operation dates must fall after the new capacity qualification date of the Demand Capacity Resource for the relevant capacity commitment period.

36. Click **Submit** to complete the registration.

A success message will appear, and the registration will be sent to ISO for review.

Once the asset has been submitted for registration, create a **new Service Note** to upload the required documents. See section [5.1. How to Create a Service Note](#).

2.3. How to Update Existing Registration for Aggregated Residential Passive Assets

The section provides instructions initiating change requests for Aggregated Residential Passive Assets, specifically for Maximum Interruptible Capacity (MIC), Maximum Load, Maximum Net Supply, Maximum Generation, and Demand Capacity Resource Mapping.

Revising the Aggregated Residential Passive Asset Template:

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second level.
4. Select **Passive Asset Search**.
5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click the **Service Notes** tab.
8. Retrieve the previous version of the populated template from the asset's service notes tab.
9. If adding installations, highlight them and ensure they are in the same load zone, have the same distribution company and fall within the six-month grouping period for the specific asset.
10. If applicable, delete any installations that no longer apply to the registration. If deleting hybrid assets, ensure they are deleted from the "Hybrid" tab of the spreadsheet and the summary tab is updated reflect the new MIC and Nameplate values.
11. Update the As of Date on the template with each revision
12. Click **Submit**

A success message will appear, and the registration will be sent to ISO for review.

2.4. How to Re-Map a Demand Response Resource to an Active Demand Capacity Resource

Steps:

1. Launch CAMS
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second level.
4. Select **DRR Search**
5. Enter the search criteria and click **Submit**
6. Search results are displayed below the search criteria.
7. Click on an **Individual DRR ID** to view the full record and access the mapping options.

The DR Resource Details screen will display.

DR Resource Details

As Of * DRR ID DRR Name Short Name DRR Status Date Effective Lead Participant (ID)

Basic Mappings Contacts Change Log Change Requests Service Notes

RTU ID DDE (ID) DISPATCH LOCATION ID (ID) Active Demand Capacity Resource (ID) MIC (MW)

Registered@Aggregation Zone Dispatch Zone (ID) DRR Aggregation Zone (ID) Reserve Zone ID

Operating Reserve Capability Audits

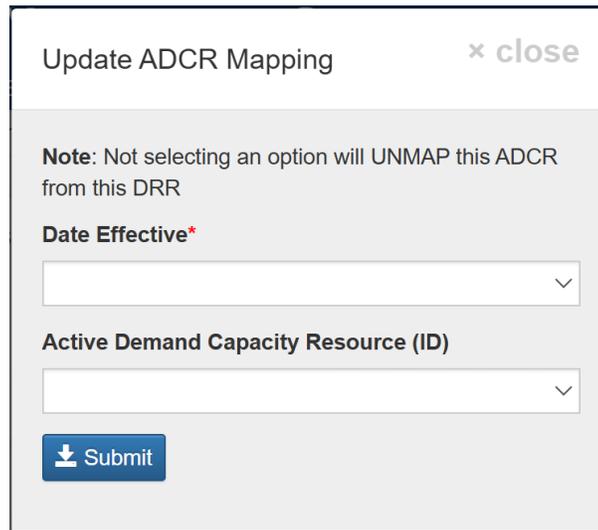
TMSR TMNSR TMOR No audit data exists for this asset.

Update ADCR Mapping Update DDE Retire DRR

Figure 44. DR Resource Details screen

8. Click **Update ADCR Mapping**

The Update ADCR Mapping screen will display.



Update ADCR Mapping × close

Note: Not selecting an option will UNMAP this ADCR from this DRR

Date Effective*

Active Demand Capacity Resource (ID)

Submit

Figure 45. Update ADCR Mapping screen

9. Select **Date Effective** from the list. The date effective must be the *first of a month*.
10. Select the **Active Demand Capacity Resource (ID)** that the asset should be mapped to.
11. Available resources are:
 - Those of the same demand resource type as the asset
 - Those belonging to your company as lead market participant and in the same aggregation zone.
12. Click **Submit**

A success message will appear, and the request will be sent to ISO for review.

2.5. How to Un-Map a Demand Response Resource to an Active Demand Capacity Resource

Users assigned the External Demand Asset Maintainer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu.
3. Click **Demand Assets** on the second-level menu.
4. Select **DRR Search**.
5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click on an **Individual DRR ID** to view the full record and access the mapping options.

The DR Resource Details screen will display.

The screenshot shows the 'DR Resource Details' screen. At the top, there is a search bar with fields for 'As Of', 'DRR ID', 'DRR Name', 'Short Name', 'DRR Status', 'Date Effective', and 'Lead Participant (ID)'. Below this is a navigation menu with tabs: 'Basic', 'Mappings', 'Contacts', 'Change Log', 'Change Requests', and 'Service Notes'. The main content area contains several fields: 'RTU ID', 'DDE (ID)', 'DISPATCH LOCATION ID (ID)', 'Active Demand Capacity Resource (ID)', and 'MIC (MW)'. There are also fields for 'Registered@Aggregation Zone', 'Dispatch Zone (ID)', 'DRR Aggregation Zone (ID)', and 'Reserve Zone ID'. Below these are links for 'Operating Reserve Capability' and 'Audits'. At the bottom, there are fields for 'TMSR', 'TMNSR', and 'TMOR', with a note 'No audit data exists for this asset.' At the very bottom, there are three buttons: 'Update ADCR Mapping' (highlighted with a red box), 'Update DDE', and 'Retire DRR'.

Figure 46. DR Resource Details screen

8. Click **Update ADCR Mapping**.

The Update ADCR Mapping screen will display.

Update ADCR Mapping × close

Note: Not selecting an option will UNMAP this ADCR from this DRR

Date Effective*

▼

Active Demand Capacity Resource (ID)

▼

 Submit

Figure 47. Update ADCR Mapping screen

9. Select **Date Effective** from the list. The date effective must be the *first of a month*.
10. Click **Submit**.

A success message will appear, and the request will be sent to ISO for review.

3. Retiring Assets

3.1. How to Retire an Asset

Users assigned to the External Demand Asset Maintainer role can complete this task in CAMS.

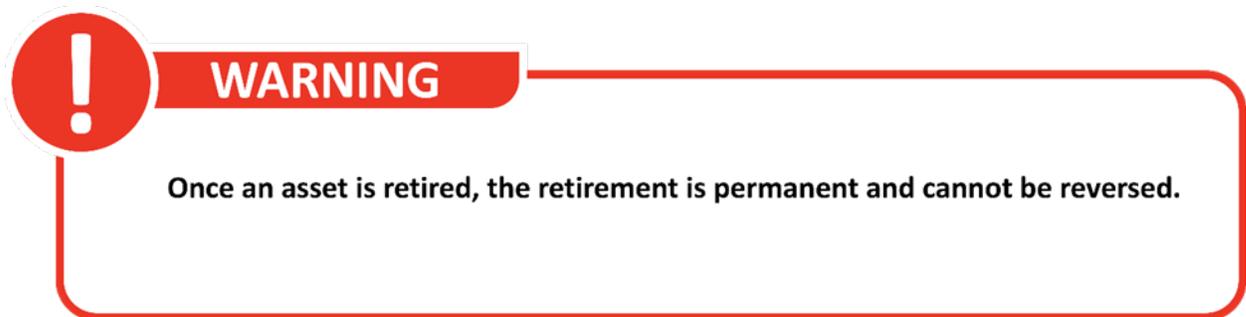


Figure 48. Asset Retirement Warning

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu.
3. Click **Demand Assets** on the second-level menu.
4. Select **Active Asset Search** or **Passive Asset Search**.
5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click an individual asset ID to view the full record.

The Retire Asset screen will display.



Figure 49. Retire Asset screen

8. Click **Retire Asset**.

9. Enter the **Date Effective** of the retirement. The date effective must be the *first of a future month*.
10. Click **Submit**.

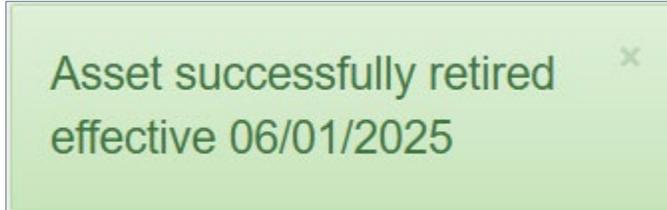


Figure 50. Asset Successfully Retired screen

3.2. How to Retire a Demand Response Resource

Users assigned to the External Demand Asset Maintainer role can complete this task in CAMS. **Note:** All DRAs associated with the DRR must be retired or remapped before the DRR will be allowed to retire.

!

WARNING

Once a DRR is retired, the retirement is permanent and cannot be reversed.

Figure 51. DRR Retirement Warning

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu.
3. Click **Demand Assets** on the second-level menu.
4. Click **DRR Search** on the third-level menu bar.

The DRR Search screen will display.

As Of	DRR ID	DRR Name	Short Name	DRR Status	Has ADCR
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DRR Aggregation Zone (ID)	Reserve Zone (ID)	Dispatch Zone (ID)	DDE (ID)	ADCR Name (ID)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Figure 52. DRR Search screen

5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click the **DRR ID** to view the full resource record.

The DR Resource Details screen will display.



Figure 53. DR Resource Details screen

8. Click **Retire DRR**.

The Retire DDR Screen will appear.

A screenshot of a web form titled "Retire DRR" with a close button in the top right corner. The form contains a label "Date Effective*" above a text input field with a dropdown arrow on the right. Below the input field is a blue "Submit" button with a white download icon.

Figure 54. Retire DRR - Date Effective screen

9. Enter the **Date Effective** of the retirement. The date effective must be the *first day of a future* month.
10. Click **Submit**.

4. Managing Demand Resources

TIP

To view a list of demand response assets as of the selected date, click the **CSV Export button at the bottom of the Asset Search Results screen. This will assist in verifying which asset(s) are approved and operational, and included in the monthly communication model.**

Asset ID	Asset Name	Lead Participant (ID)	Asset Status	Effective	Dispatch Zone (ID)	Aggregation Zone (ID)	DRR (ID)	Oper
XXXXX	XXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX XXXXXXXX	APPROVED	MM/DD/YYYY XXXXXXXXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXX XXXX	Y
XXXXX	XXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX XXXXXXXX	APPROVED	MM/DD/YYYY XXXXXXXXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXX XXXX	Y
XXXXX	XXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX XXXXXXXX	APPROVED	MM/DD/YYYY XXXXXXXXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXX	XXXXXXXXXX XXXX	Y

CSV Export
Displaying 1 to 20 of 464

Figure 55. Tip for viewing a list of demand response assets

4.1. How to Search for or View a Demand Response Resource

Users assigned to the External Resource Maintainer or External Resource Viewer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second level.
4. Click **DRR Search** on the third-level menu bar.

The DRR Search screen will display.

Dashboard
Change Request Search
Active Asset Search
Passive Asset Search
DRR Search
RTU Search
PNode Lookup
DRI
Enroll Active
Enroll Passive

As Of	DRR ID	DRR Name	Short Name	DRR Status	Has ADCR
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DRR Aggregation Zone (ID)	Reserve Zone (ID)	Dispatch Zone (ID)	DDE (ID)	ADCR Name (ID)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Reset
Submit

Figure 56. DRR Search screen

5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click the **DRR ID** to view the full record.

The DR Resource Details screen will display.

The screenshot shows the 'DR Resource Details' interface. At the top, there is a search bar with a dropdown menu labeled 'As Of *' and several input fields for 'DRR ID', 'DRR Name', 'Short Name', 'DRR Status', 'Date Effective', and 'Lead Participant (ID)'. Below the search bar is a navigation menu with tabs: 'Basic', 'Mappings', 'Contacts', 'Change Log', 'Change Requests', and 'Service Notes'. The 'Basic' tab is active, displaying a form with fields for 'RTU ID', 'DDE (ID)', 'DISPATCH LOCATION ID (ID)', 'Active Demand Capacity Resource (ID)', and 'MIC (MW)'. Below these are fields for 'Registered@Aggregation Zone', 'Dispatch Zone (ID)', 'DRR Aggregation Zone (ID)', and 'Reserve Zone ID'. There are also links for 'Operating Reserve Capability' and 'Audits'. At the bottom, there are input fields for 'TMSR', 'TMNSR', and 'TMOR', with a note 'No audit data exists for this asset.' At the very bottom, there are buttons for 'Update ADCR Mapping', 'Update DDE', and 'Retire DRR'.

Figure 57. DR Resource Details screen

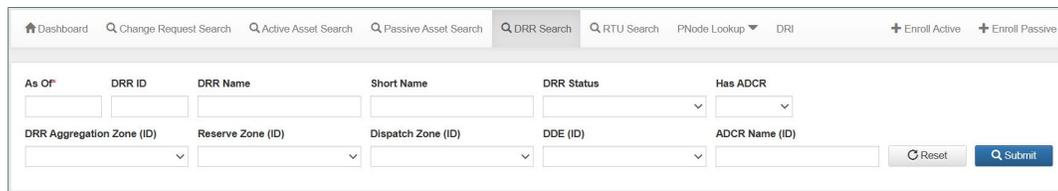
4.2. How to Update a Demand Designated Entity for a Resource

Users assigned to the External Resource Maintainer or External Resource Viewer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second level.
4. Click **DRR Search** on the third-level menu bar.

The DRR Search screen will display.



The screenshot shows the DRR Search screen in CAMS. The top navigation bar includes links for Dashboard, Change Request Search, Active Asset Search, Passive Asset Search, DRR Search (selected), RTU Search, PNode Lookup, and DRI. There are also links for Enroll Active and Enroll Passive. The search form contains the following fields: As Of (text), DRR ID (text), DRR Name (text), Short Name (text), DRR Status (dropdown), Has ADCR (dropdown), DRR Aggregation Zone (ID) (dropdown), Reserve Zone (ID) (dropdown), Dispatch Zone (ID) (dropdown), DDE (ID) (dropdown), and ADCR Name (ID) (text). There are also buttons for Reset and Submit.

Figure 58. DRR Search screen

5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click the **DRR ID** to view the full record.

The DR Resource Details screen will display.

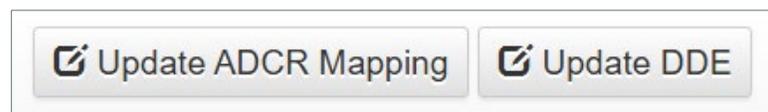


Figure 59. DR Resource Detail screen

8. Click **Update DDE**.

The Update DDE screen will display.

Update DDE x close

Note: The RTU will need to be remapped.
A notification will be sent to the DDE contacts

Date Effective*

DDE Name (ID)*

Submit

Figure 60. Update DDE screen

9. Select **Date Effective** from the list. The date effective must be the *first of a month*.
10. Select **DDE Name (ID)** from the drop-down menu.
11. Click **Submit**.

A success message will appear.

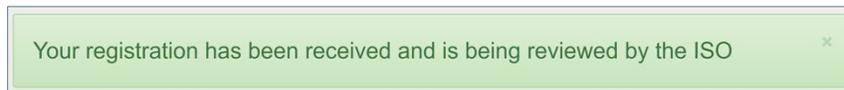


Figure 61. Example of a success message

4.3. How to Update a Remote Terminal Unit for a Resource

Users assigned to the External Remote Terminal Unit Maintainer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second level.
4. Click **RTU Search** on the third-level menu bar.

The Search RTUs screen will display.

Search RTUs

As Of: 04/03/2025

Reset Form Search

RTU (ID) Provide one or more characters of name or entire ID	Dispatch Location (ID) Provide one or more characters of name or entire ID	Circuit Billing Customer (ID) Begin typing, then select from list	Mapped Asset or DRR Name (ID) Begin typing, then select from list
Circuit 1 ID Provide the entire ID of Circuit 1	Circuit 2 ID Provide the entire ID of Circuit 2	RTU Type Select a Type	RTU Status Select a Status

Figure 62. Search Remote Terminal Unit screen

5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click the **DRR ID** to view the full record.

The DR Resource Details screen will display.

Remote Terminal Unit (RTU) Details

As Of: * RTU ID Type Status Port Number Host Name Alternate Host Name Circuit Bill Payer (ID)

Dispatch Location (ID) Effective Expires Circuit-1 ID Circuit-2 ID

Demarc

Demarc Address Name Demarc Street Demarc City Demarc State Demarc Postal Code

DRR Mappings

DRR ID DRR Name Status Lead Participant (ID) Effective Expires MIC (MW)

Dispatch Location Details Update Transfer

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Figure 63. DR Resource Details screen

8. Click **Update RTU**.

The Update RTU screen will display.

Update RTU x close

RTU ID* Effective Date* Status* RTU Type*

Port Number* Circuit Bill Payer (ID)

Circuit-1 ID Circuit-2 ID

Host Name* Alternate Host Name

Demarc Address Name* Demarc Street

Demarc City* Demarc State Demarc Postal Code

Submit

Figure 64. Update RTU screen

9. Select **Date Effective** from the list. The date effective must be the *first of a month*.

10. Click **Submit**

A success message will appear.

5. Supporting Actions and Updates

5.1. How to Create a Service Note

Users assigned to the External Demand Asset Maintainer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second level.
4. Select **Active Asset Search** or **Passive Asset Search**.
5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click the **Service Notes** tab.
8. Click the **+Create New**.

The Service Notes screen will display.

	Display	Email To	File Upload:
ISO	Yes	Yes	Choose File No file chosen
Lead Participant	Yes	No	
Meter Reader	No	No	

Figure 65. Service Notes screen

9. Enter the text for the **Service Note** (required).
 - Choose to have the note displayed in CAMS or emailed (optional).
 - Upload any supporting documents (optional). The maximum file size is 2MB (per file).
10. Click **Submit**.

11. Users may view Service Notes in the **Asset View screen**.
12. Use the **Filter By** drop down to find relevant notes.

5.2. How to Update Monthly Performance Values

Performance values are only entered for passive assets with a reduction method of energy efficiency. Users assigned to the External Demand Asset Maintainer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second level.
4. Select **Passive Asset Search**.
5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click an individual asset ID to view the full record.

The Passive Asset Details screen will display.

Passive Asset Details

As Of *

Asset ID	Asset Name	Asset Status	Asset Type	Asset Sub-Type	Date Effective
<input type="text"/>					

Lead Participant (ID) Load Zone (ID) Demand Capacity Resource (ID)

Basic | Contacts | Change Log | Change Requests | Service Notes

Requested Operational Date	Actual Operational Date	MIC (MW)	Reduction Method	Measure ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Audits

Summer (MW)	Winter (MW)
<input type="text"/>	<input type="text"/>

Figure 66. Passive Asset Details screen

8. Click **Monthly Performance Values**.

The Monthly Performance Values screen will display.



Figure 67. Monthly Performance Values screen

9. Click **Update**.

The Update Monthly Performance Values screen will display.

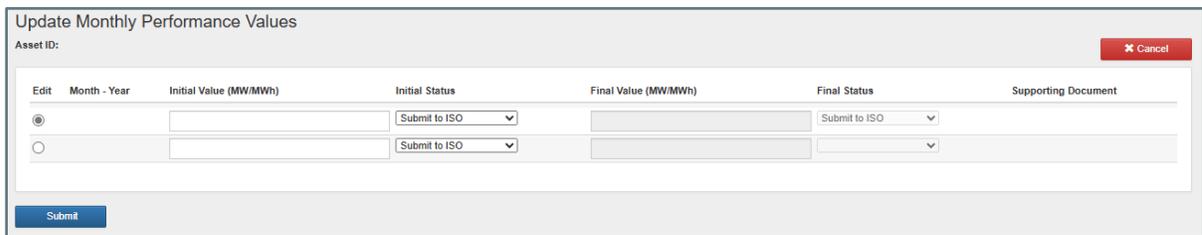


Figure 68. Update Monthly Performance Values screen

10. Click on the **radio button** to select the Obligation Month to be edited.

11. Enter the **Initial Value (MW/MWh)**.

12. Initial Status will default to Submit to ISO.

13. Click **Browse** to attach supporting documents.

14. Click **Submit**.

5.3. How to Enter Curtailment

Users assigned to the External Demand Asset Maintainer role can complete this task in CAMS.

Steps:

1. Launch CAMS.
2. Click **Assets** on the top-level menu bar.
3. Click **Demand Assets** on the second level.
4. Select **Active Asset Search**.
5. Enter the search criteria and click **Submit**.
6. Search results are displayed below the search criteria.
7. Click an individual asset ID to view the full record.

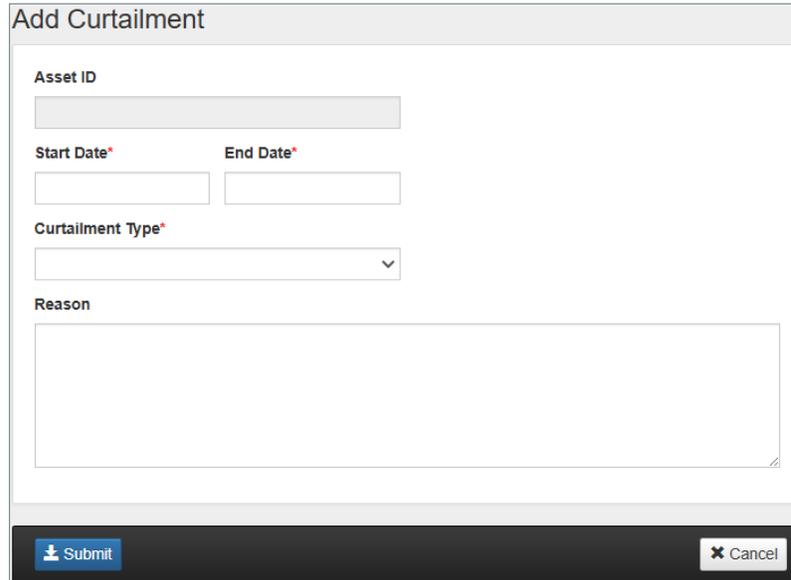
The Asset Details screen will display.

The screenshot displays the 'Active Asset Details' screen. At the top, there are search filters for 'As Of', 'Asset ID', 'Asset Name', 'Asset Status', 'Asset SubType', and 'Date Effective'. Below these are fields for 'Lead Participant (ID)', 'DRR Name (ID)', and 'Active Demand Capacity Resource (ID)'. A navigation bar includes tabs for 'Basic', 'Facility', 'Contacts', 'Change Log', 'Change Requests', 'Service Notes', and 'Curtailments'. The 'Curtailments' tab is active, showing a '+ Add Curtailment' button. Below this is a form for 'CCP' and 'Number of days'. A table header is visible with columns: 'ID', 'Start', 'End', 'Type', 'Status', 'Reason', 'Updated', and 'Updated By'. At the bottom, there are buttons for 'Update Asset', 'Update DRR Mapping', 'Map to New DRR', and 'Retire Asset'.

Figure 69. Active Asset Details screen

8. Click the **Curtailment** tab.
9. Click **+Curtailment**.

The Add Curtailment screen will display.



The screenshot shows a web form titled "Add Curtailment". The form contains the following elements:

- Asset ID:** A text input field.
- Start Date* and End Date*:** Two date selection fields.
- Curtailment Type*:** A dropdown menu.
- Reason:** A large text area for entering the reason for the curtailment.
- Buttons:** "Submit" and "Cancel" buttons at the bottom.

Figure 70. Add Curtailment screen

10. Enter the **Start Date** and **End Date** of the curtailment.

11. Select the **Curtailment Type** for the drop-down menu.

- Choose **Forced** when the curtailment is due to an unexpected situation. Forced curtailments must be approved by the ISO.
- Choose **Scheduled** when the curtailment is planned. Scheduled curtailments are automatically scheduled unless the facility has used all allotted curtailment days.

12. Enter a **Reason** for the curtailment.

13. Click **Submit**.

A Curtailment Created screen will display.



Figure 71. Curtail Created success message

6. Abbreviations and Acronyms Used in this Guide

ADCR	Active Demand Capacity Resource
CAMS	Customer and Asset Management System
DDE	Demand Designated Entity
DRA	Demand Response Asset
DRR	Demand Response Resource
ID	identification
MIC	Maximum Interruptible Capacity
MW	megawatt
M&T Plan	Measure and Verification Plan
PNode	pricing node
RTU	remote terminal unit
UBL	unadjusted baseline

