Interconnection Request Tracking Tool (IRTT)

User Guide

Version 4.0

September 2022

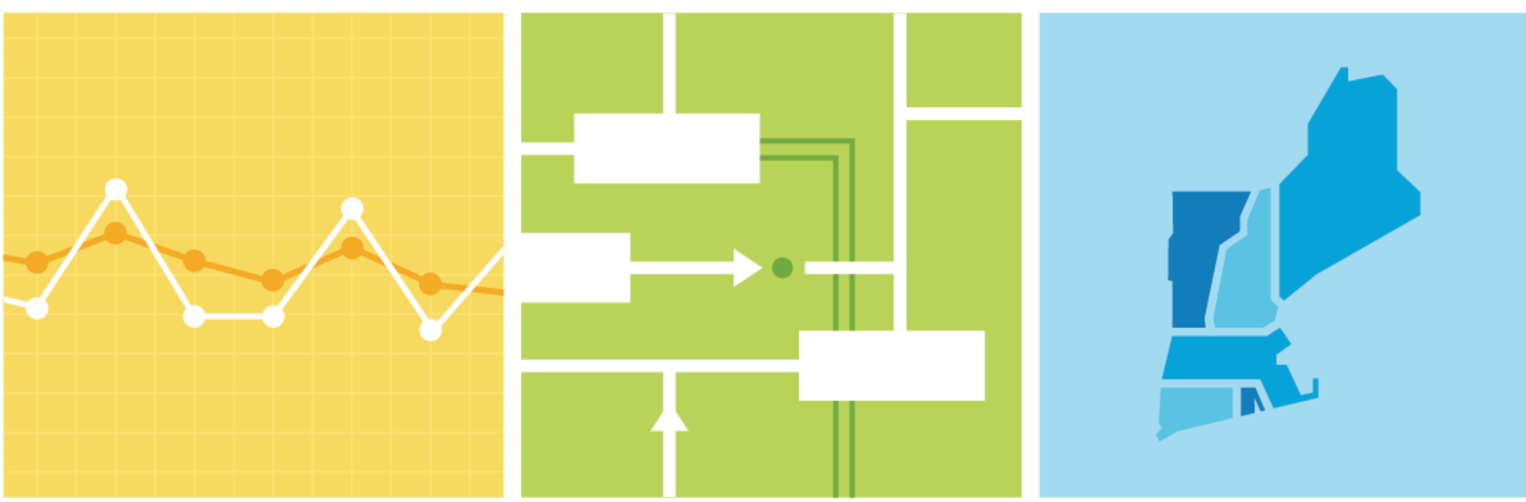


Table of Contents

Change Summary

Revision	Date	Comments
Version 1.0	May 31, 2013	Initial release
Version 2.0	December 23, 2014	Updated for recently FERC approved Schedule 23 changes, and additional system enhancements
Version 3.0	2017	Updated to reflect new IRTT implementation / user interfaces
Version 4.0	2022	Updated to reflect revised interface

Overview

Introduction

This user guide provides details for the system used by ISO New England to track Large and Small Generator Interconnection Requests, Surplus Interconnection Service Requests, and Elective Transmission Upgrade Interconnection Requests. Do not use this guide for requirements as the Market Rule and Manuals serve that function.

The procedures for Large and Small Generator interconnection can be found in Schedules 22 and 23, respectively, of the Open Access Transmission Tariff (OATT), Section II of the Transmission, Markets and Services Tariff (Tariff). The procedures for Elective Transmission Upgrade interconnection can be found in Schedules 25 of the Open Access Transmission Tariff, Section II of the Transmission, Markets and Services Tariff (Tariff).

Customers are encouraged to review the relevant governing language in Section II of the Tariff prior to using IRTT to submit interconnection requests:

- The ISO New England Inc. Transmission, Markets and Services Tariff ("Tariff") at: http://www.iso-ne.com/participate/rules-procedures/tariff
    - Section I – General Terms and Conditions
        - Section I.2.2 – Definitions
    - Section II – Open Access Transmission Tariff
    - Section II. Schedule 22 – Standard Large Generator Interconnection Procedures
    - Section II. Schedule 23 – Standard Small Generator Interconnection Procedures
    - Section II. Schedule 25 – Elective Transmission Upgrade Interconnection Procedures
- The relevant supporting documentation for new or modified interconnections on the ISO New England website at: http://www.iso-ne.com/participate/applications-status-changes/new-modified-interconnections

Use this guide as a reference for completing tasks or understanding functions such as:

- Creating and managing accounts
- Submitting an interconnection request
- Granting access to an interconnection request
- Viewing and curing existing interconnection requests

Please note that while we attempt to keep this guide current, the screen shots in this guide may not fully reflect the current production environment.

Technical Requirements

The IRTT application requires the following:

- Microsoft Edge and Google Chrome are the supported browsers. Refer to the Web Browser Support for SMD Applications page of our website for additional details on the browsers and security protocols ISO New England supports. You can find this page under *Participate* > *Support* > *Web Browser Support*.
- The ISO New England Application Portal used to access IRTT requires the Java Runtime Environment (JRE), version 1.5 (or higher).
- Users will be prompted to install the Unified Access Gateway Plug-in or Java Applet the first time they visit the ISO New England Application Portal.
- Please work with your company's desktop or IT support first to ensure the minimum requirements have been met. If additional support is needed, please contact ISO New England's Participant Support.

Participant Support

You can reach participant support using the following methods:

- **Internet**: https://www.iso-ne.com/participate/support
- **Telephone**: During regular business hours, Monday through Friday 8:00 A.M. to 5:00 P.M. Eastern Time (413) 540-4220 or (833) 248-4220
    - Days of Operation: The Customer Support Hotline is **NOT** staffed on the following days:
        - New Year's Day
        - Martin Luther King Day
        - Presidents Day
        - Memorial Day
        - Independence Day
        - Labor Day
        - Thanksgiving Day
        - Day After Thanksgiving
        - Christmas Eve Afternoon (12:00 to 17:30)
        - Christmas Day
    - For emergency inquiries by pager: (877) 226-4814
- **Email**: askiso@iso-ne.com or memcoord@iso-ne.com
- **Ask ISO**: Ask ISO is available to market participants who have a valid digital certificate and who have been assigned the role of "Ask ISO / External User" by their Security Administrator. Ask ISO is located at https://askiso.force.com.

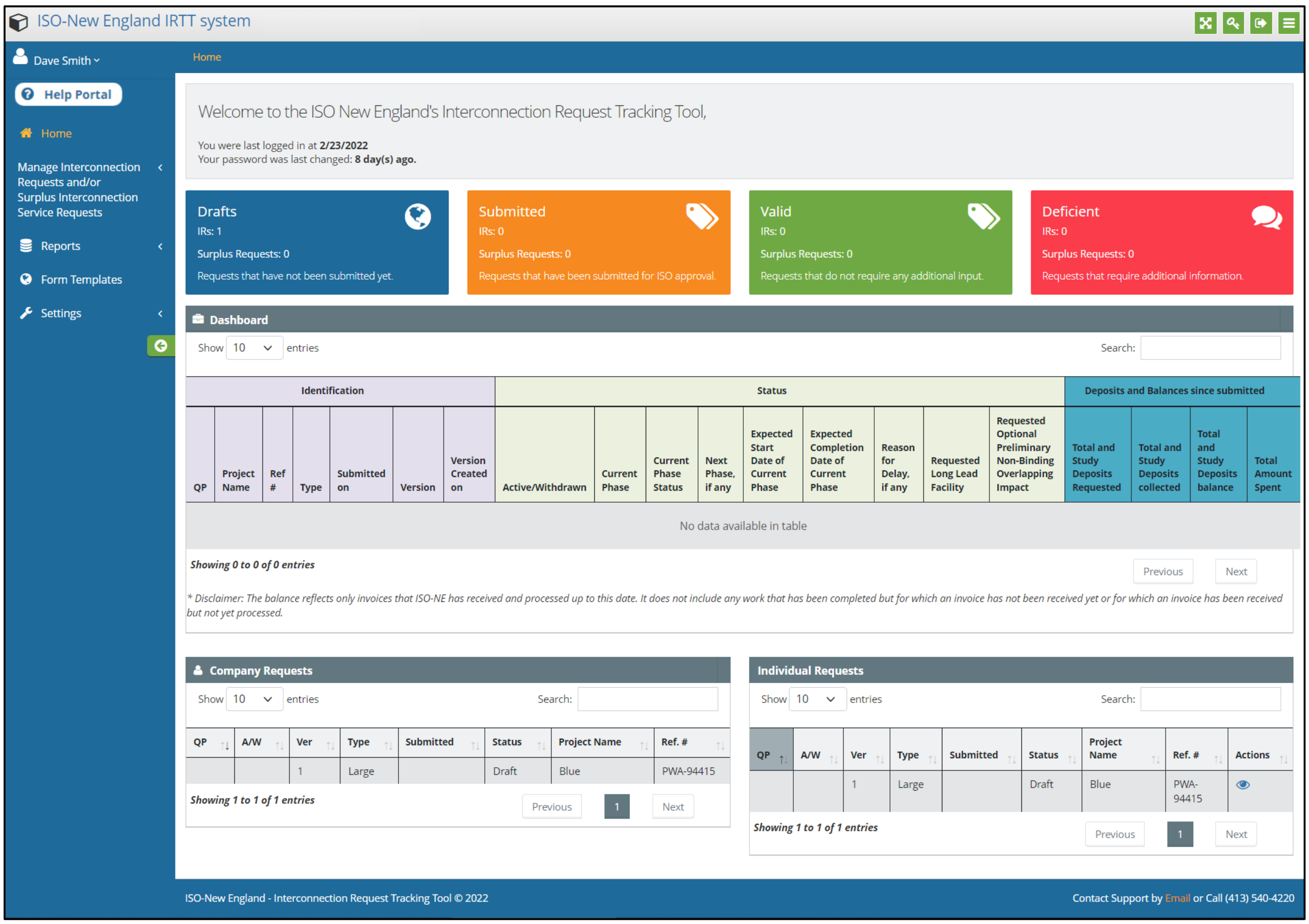
Interconnection Request Tracking Tool

The Interconnection Request Tracking Tool (IRTT) is ISO New England's tracking tool for Large Generator Interconnection Requests, Small Generator Interconnection Requests, and Elective Transmission upgrades (ETU) Interconnection Requests. IRTT is used by interconnection customers for submittal and by ISO New England for review and approval of interconnection requests.

Note: IRTT automatically logs you out after 10 minutes of inactivity

IRTT User Interface

The IRTT interface is organized by a persistent navigation menu displayed on the left side of the IRTT page. The selected menu item determines what displays in the viewing area.



The menu items expand into sub-menus providing access to create, view, or edit IRTT information. The availability of menu items and their functions vary depending on your user account role. The top level menu contains:

- Help Portal: A link to the online help which provides descriptions and links to video explanations.
- **Home**: A link to return to the Home page.
- **Manage Interconnection Requests and/or Surplus Interconnection Service Requests**: Provides sub-menus to the different interconnection requests in various statuses.
- **Reports**: A link to the Public Queue.
- **Form Templates**: Provides the large, small, and elective transmission update interconnection requests as templates.
- **Settings**: Enables you to modify the details of the associated company and user(s). This includes creating new user accounts, managing passwords, etc.
- The green arrow collapses the menu pane.

Home Page

The Home page displays first when a user logs in. The page consists of:

- Status Area
- Dashboard
- Company Requests
- Individual Requests

Status Area

The Status Area displays four tiles:

- Drafts
- Submitted
- Valid
- Deficient

Each tile displays the number of interconnection requests currently in that status. Clicking a tile takes you to the individual status page. Filtering and search tools are available on each page.

Dashboard

The Dashboard table displays a summary for each interconnection request. This includes each interconnection request’s status and financial deposit amounts. It is ISO-NE’s primary method of communicating this information to Interconnection Customers.

There are three main sections on the dashboard:

- Identification
- Status
- Deposits and Balances since submitted

The columns in the *Identification* section provide identifying information for each interconnection request:

Column	Description
QP (Queue Position)	The Queue Position (number) assigned to the project by ISO-NE. For more information, see *Determination of Interconnection Request Queue Position* in the Help Portal.
Project Name	The name of the project submitted by the company.
Ref # (Reference Number)	A unique number assigned to the project by IRTT to maintain a unique reference to each interconnection request.
Type	Whether the interconnection request is a Large Generator, Small Generator, or Elective Transmission Upgrade project.
Submitted on	The date the interconnection request was initially submitted via IRTT. For more information, see *Requested date from the ISO Queue vs. date in which the ISO assigns the Interconnection Request/Transmission Service Application a Queue Position* in the Help Portal.
Version	The current version number of the interconnection request.
Version Created on	The date the current version of the interconnection request was initially submitted via IRTT.

The columns in the *Status* section provides details regarding the current phase and status of each interconnection request as well as data including expected completion date and reasons for delay (if any). For more information about actual vs expected dates, see *Actual vs. expected dates on my interconnection request* in the Help Portal:

Column	Description
Active/Withdrawn	The status of the interconnection request. Indicates whether the project is actively in the Queue or Withdrawn from the Queue.
Current Phase	The phase that the interconnection request is currently in (Feasibility Study, System Impact Study, etc.). Change in the *Current Phase* field will automatically trigger an email notice to be sent to users that have access to the given interconnection request.
Current Phase Status	The status of the phase that the interconnection request is currently in (Not Started, In Progress, etc.). Change in the Current Phase Status field will automatically trigger an email notice to be sent to users that have access to the given interconnection request.
Next Phase, if any	The next phase of the interconnection request lifecycle.
Expected Start Date of Current Phase	The date when work associated with the Current Phase of the IR is expected to commence. Change in the *Expected Start of Date of*

Column	Description
	Current Phase field will automatically trigger a notice to be sent to users that have access to the given interconnection request.
Expected Completion Date of Current Phase	The date when work associated with the Current Phase of the IR is expected to be completed. Change in the *Expected Completion Date of Current Phase* field will automatically trigger an email notice to be sent to users that have access to the given interconnection request.
Reason for Delay, if any	The reason for delay, if any (for example, dependencies on prior queued studies still in progress prevent the study effort from fully completing). Change in the *Reason for Delay (if any)* field will automatically trigger a notice to be sent to users that have access to the given interconnection request.
Requested Long Lead Facility	Identifies whether Long Lead Facility has been requested with the associated interconnection request (yes/no).
Requested Optional Preliminary Non-Binding Overlapping Impact	Identifies whether Requested Optional Preliminary Non-Binding Overlapping Impact analysis has been requested with the associated interconnection request, and the phase during which it has been requested (Feasibility vs. System Impact Study).

The columns in the *Deposits and Balances since submitted* section provide information regarding the amount of financial deposit requested, collected, and spent for each interconnection request:

Column	Description
Total and Study Deposits Requested	The total amount of financial deposit requested by ISO-NE for the given interconnection request.
Total and Study Deposits collected	The total amount of financial deposit submitted by the company for the given interconnection request. **Note:** ISO-NE only accepts wire transfer of funds for deposits.
Total and Study Deposit balance	The total financial deposit balance for the given interconnection request as of the current date/time.
Total Amount Spent	The total financial deposit spent by ISO-NE studying/analyzing the given interconnection request as of the current date/time.

Company Requests

The *Company Requests* table provides a summary of all of the interconnection requests submitted by your company whether or not you have been granted access to the request.

Individual Requests

The *Individual Requests* table provides a summary of only the interconnection requests submitted by your company that you have been granted access to. Click to **View** the details of the selected interconnection request.

Account Management

Access to IRTT is managed through the application itself and requires a user account. Your user account is assigned a role and that role determines the permissions you have in IRTT.

Roles

User accounts are categorized into three different roles:

- **Company Admin**: Allows an individual to manage all aspects available to customers in IRTT. This includes the submitting of an interconnection request, adding users, and managing specific access to a customer's interconnection requests. The company admin is responsible for assigning IRTT user access roles in accordance with your company's policies.
- **Request Manager**: Allows an individual to manage specific access to a customer's interconnection requests and the submission of an interconnection request and subsequent review of submitted information (provided the user has been granted access to a specific interconnection request).
- **Request Viewer**: Allows an individual to view access of IRTT. This includes viewing interconnection requests, the public queue, and editing your own contact information.

Your assigned role determines the permissions for your account. For a detailed list of permissions for each role, see *Functions Available to Roles* in the Appendix.

Creating an IRTT Company Admin Account

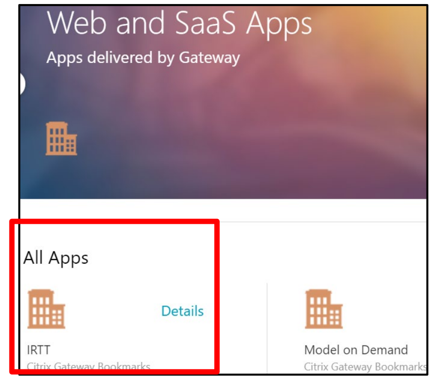
Before you create user accounts in IRTT and assign roles, you need to register your company and create a company admin account. For more information, see *Create a new company* in the Help Portal. The first user you create for your company is automatically created as a company admin account. The company admin role is responsible for assigning IRTT access roles for the users at your company. Those users need to register with IRTT after the company admin creates their accounts and assigns roles.

Do not create duplicates of your user account or company accounts. Duplicate entries can cause missing information and can lead to delays. To determine if you or your company already has an account contact ISO New England via email at IRTT@iso-ne.com.

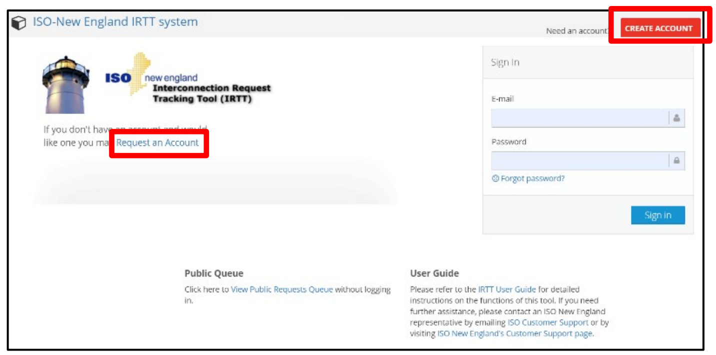
To register your company, you need an ISO NE Customer ID form (also known as the Generator Interconnection Studies Billing form). To register a user account, you need a Critical Energy Infrastructure Information (CEII) Request form and a CEII Non-Disclosure Agreement (NDA) form in order for the account to be verified. The NDA is included with the CEII Request form. Customers may provisionally submit interconnection requests to IRTT before their account status has been verified.

To register your company and create the initial IRTT admin account:

1. Navigate to https://portal.iso-ne.com. From iso-ne.com, scroll to the bottom of the page and click IRTT. The ISO New England portal displays.
2. Select the **IRTT** app. The IRTT sign in screen displays.



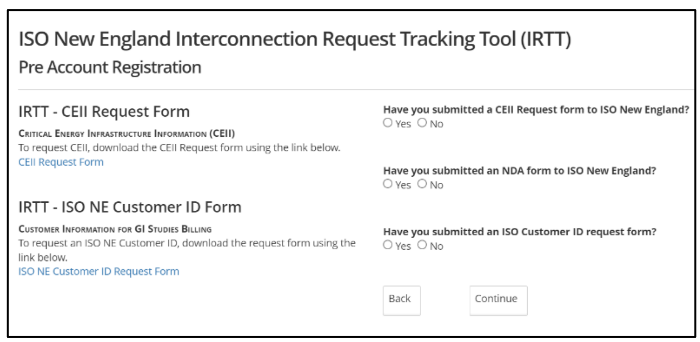
3. Click **Create Account** (you can also click **Request an Account**). The *PreAccount Registration* page opens. This account will become the company admin account once you complete the registration.



4. Indicate if you submitted the following:
   - CEII Request Form
   - NDA Form
   - ISO Customer ID Form

   You can continue if you answer No to these questions.

   Links to the CEII Request form and the ISO Customer ID form are provided. The NDA is included with the CEII Request form.

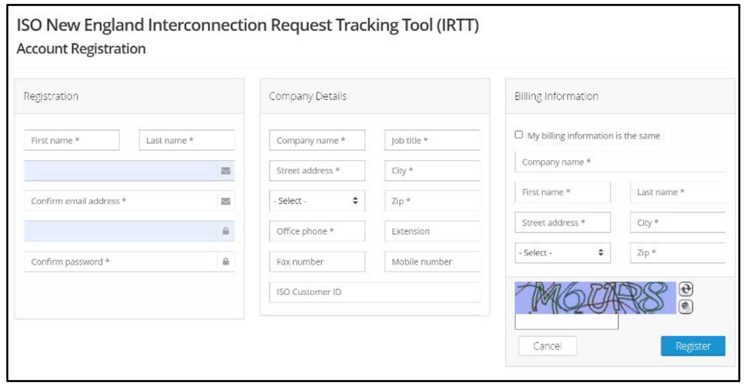


5. Click **Continue**.

6. Provide your **Registration**, **Company Details**, and **Billing Information**. Required fields are marked with an asterisk.

   Important! You must match the company name and customer ID exactly to any existing customer account in any ISO New England system.

   Your password must contain more than six characters, at least one number, at least one upper and lower case letter, and at least one special character.



7. Type the randomly generated security code exactly as it is presented below the security code.

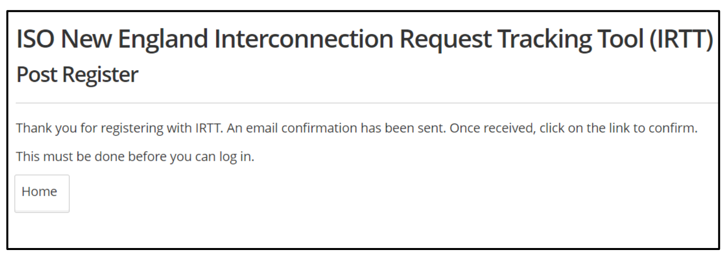
   Click the refresh button if you need a different security code. Click the speaker icon to hear the codes spoken.

8. Click **Register** to continue.

   IRTT validates the information you submitted and will notify you via pop-up message if there are any issues. You will be able to modify the submitted information to correct any noted issues. When there are no submission issues, you will be redirected to the *IRTT Post Registration* screen.

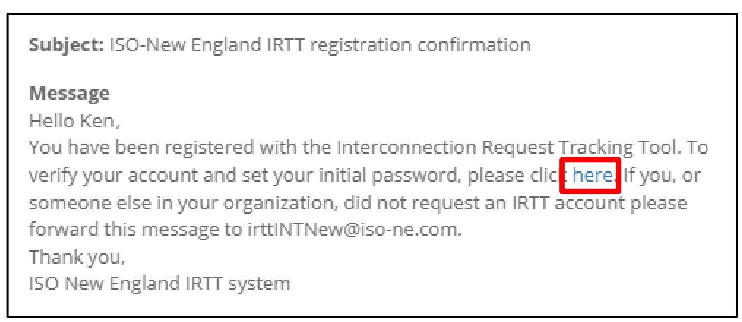
9. Close your browser or click **Home** to return to the IRTT Sign In screen.

   IRTT will send an email from IRTTAdmin@iso-ne.com (an unmonitored email address) to the address you registered which contains a link to confirm the account request and email address.



10. Click the **here** link in the email. The link opens the *Account Confirmation* screen. This completes your registration. You can now sign in to IRTT.

    Please contact IRTT@iso-ne.com if you do not receive the email.



After registration is complete, your account will be validated. The account validation process generally takes three to five business days. During this time you can start entering the details of an interconnection request or modify the company details. Once validated, as the company admin you can add additional users to IRTT and assign the appropriate roles for users at your company. You will also be able to add company representative users who can help you manage specific interconnection requests or aspects of the process.

Important! Make sure you wait for the first company admin account to be validated before adding additional users. Registering user accounts without first initiating it through the Account Management feature of IRTT will result in multiple customer accounts. This will separate the interconnection requests into multiple customer accounts which ultimately will result in delays and you will be asked to resubmit requests under a single account.

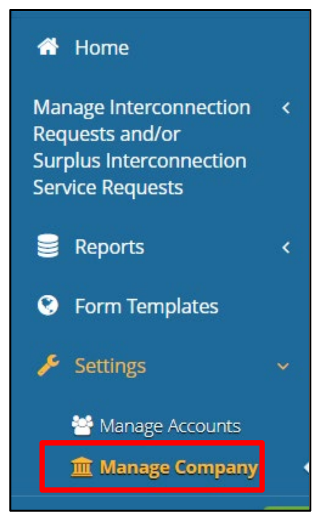
Creating New User Accounts

User accounts can only be created by a company admin account. If you want to request an account but do not know who the company admin is for your company, contact ISO New England's IRTT Administrator at IRTT@iso-ne.com. The company admin creates the account and then the user confirms it.

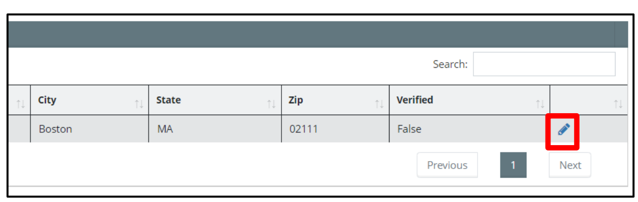
In addition to confirming the account, the user needs to submit a CEII Request form, the NDA form, and the ISO Customer ID form for verification. These forms are located on the ISO New England web site under *Participate* > *Support* > *Library of Participant Support Forms*. Users may provisionally submit interconnection requests to IRTT before the account is verified. For additional information, see *Add a new user to the company* in the Help Portal.

To create users for your company:

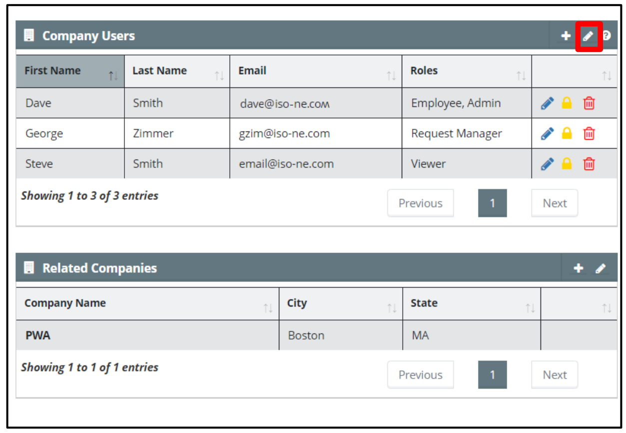
1. Click **Settings > Manage Company** from the navigation menu. The *Company Management* page opens.



2. Click the **pencil** in the column on the far right to open the *Company Details* page.

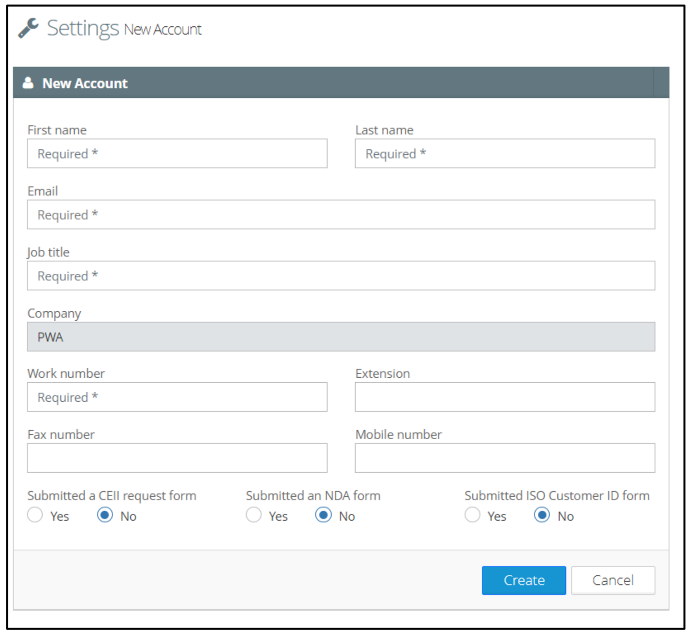


3. Click **Create user** in the *Company Users* table. The *New Account* page opens.

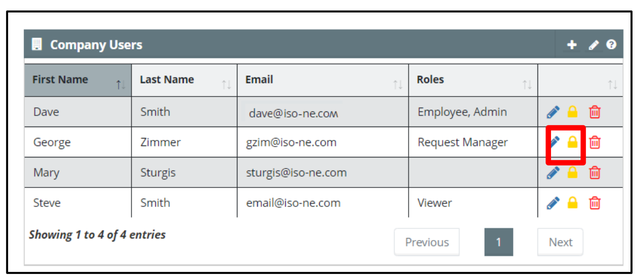


4. Type the new user information. Fields with an asterisk are required. Pre-populated company data cannot be modified.
5. Indicate whether or not the new user has submitted:
   - CEII Request Form
   - NDA Form
   - ISO Customer ID Form
6. Click **Create**. IRTT opens the *Company Details* page and the new user is added to the *Company Users* table.

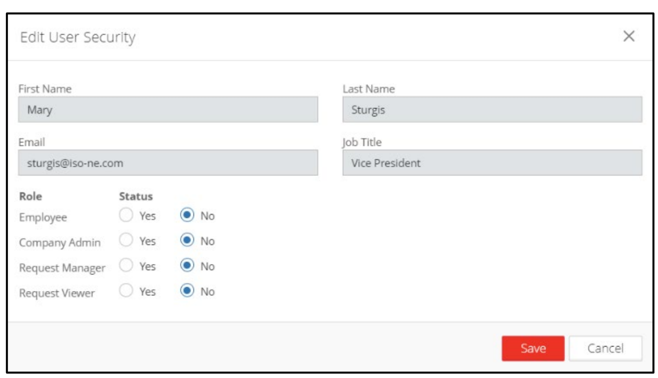
   An email is sent to the user for account confirmation. You can proceed with setting the user's role.



7. Click the **gold padlock** for the user you just created in the *Company Users* table. The *Edit User Security* page opens.



8. Select the [role(s)] for the user and click **Save**. The user security is updated.

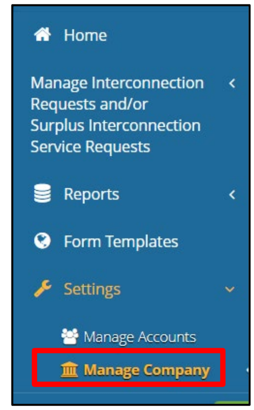


Adding an Existing User to a Related Company

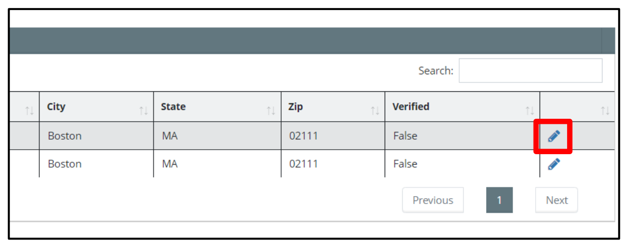
Company admins can associate a user with an existing account at one company to another related company. The company admins need to be company admins at both companies. This can be beneficial for multiple companies operating as subsidiaries under a parent company. The companies must be related before you add the existing user.

To add an existing user to a related company:

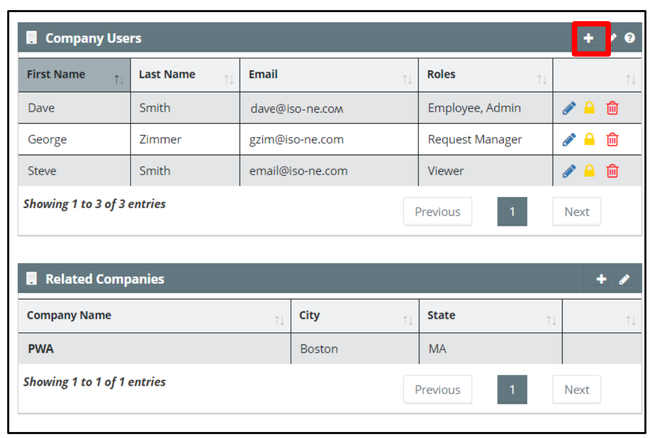
1. Click **Settings > Manage Company** from the navigation menu. The *Company Management* page opens.



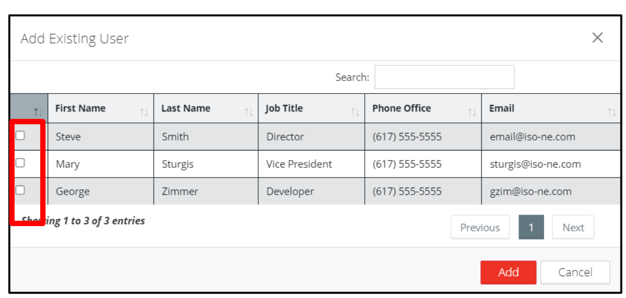
2. Click the **pencil** for the company that you want to add a user to. The *Company Details* page opens.



3. Click **Add user** in the *Company Users* table. The *Add Existing Users* dialog box opens.



4. Select one or more users and click **Add**. The *Company Details* page opens and the new user(s) are listed in the *Company Users* table.



New User Confirmation and Log In

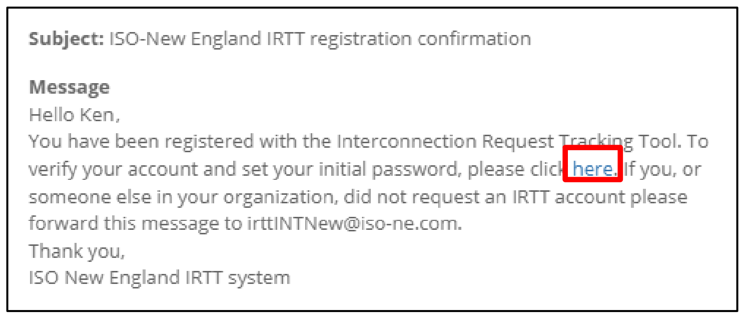
When your company admin creates your account, you need to confirm the account before you can log in for the first time.

Confirming Your IRTT Account

After your account creation, IRTT sends you an email from IRTTAdmin@iso-ne.com (an unmonitored email address) with a confirmation link to create your password.

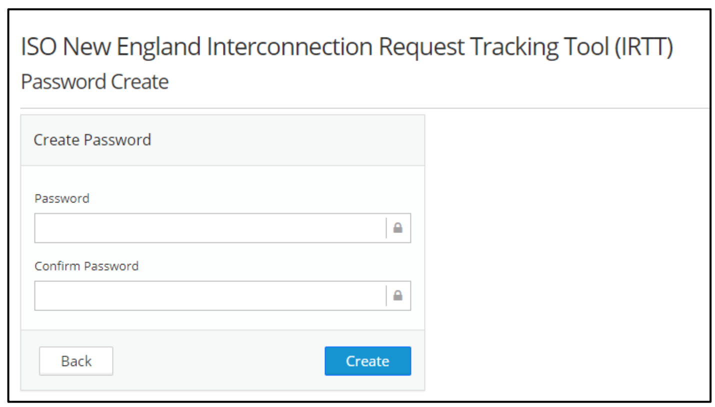
To confirm your IRTT account:

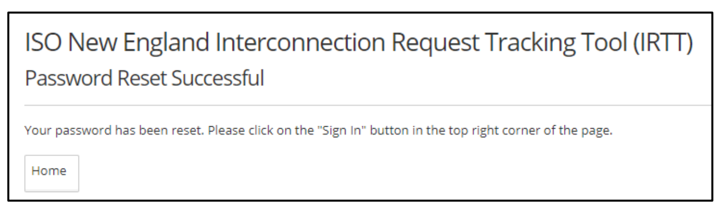
1. Click the **here** link in the email message you receive. The *Password Create* screen displays.



2. Type a **password** and **confirm** it. Your IRTT password must contain more than six characters, at least one number, at least one upper and lower case letter, and at least one special character.
3. Click **Create**. The *Password Reset Successful* screen displays.

   You can now sign in to IRTT using the new password.





Signing in to IRTT

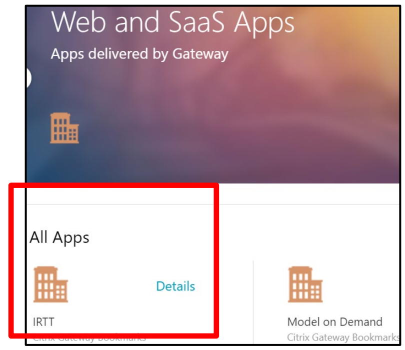
Once your account is created, you can sign in to IRTT.

Note: IRTT automatically logs you out after 10 minutes of inactivity.

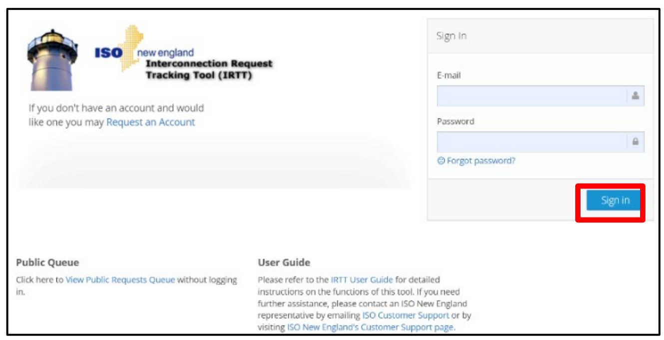
To sign in to IRTT:

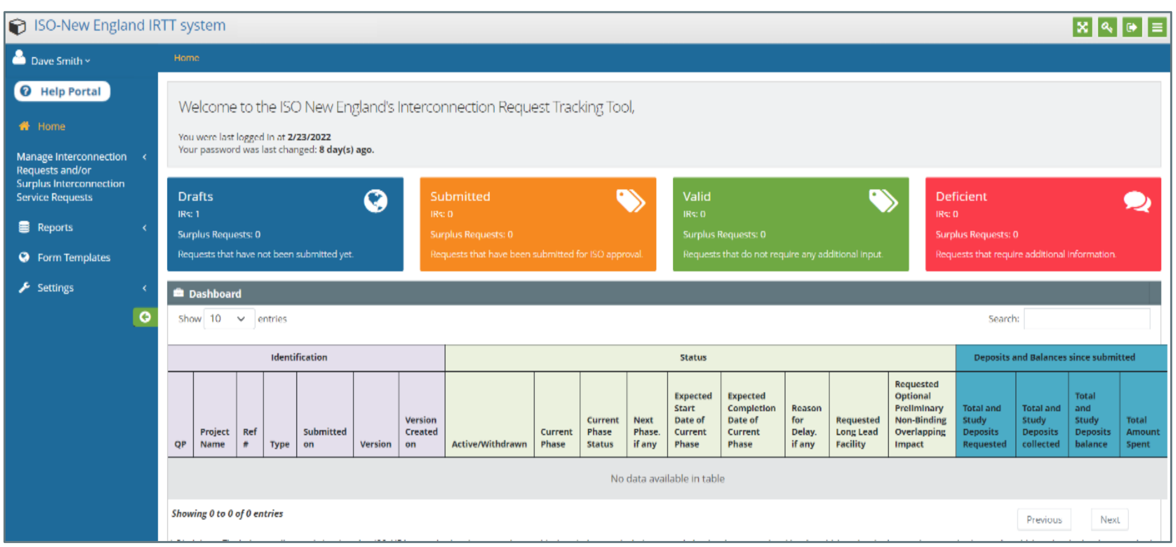
1. Navigate to https://portal.iso-ne.com. From iso-ne.com, scroll to the bottom of the page and click IRTT. The ISO New England portal displays.

2. Select the **IRTT** app. The IRTT sign in screen displays.

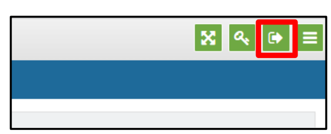


3. Enter your email address and your password. Click **Sign In**. The IRTT *Home* page opens.





Once you have finished using IRTT, you can sign out by clicking the **Sign Out** button in the top right corner.



Managing Settings

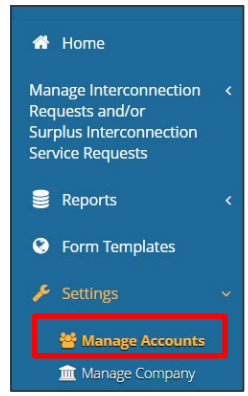
[Depending on your role](), IRTT enables you to view or modify the details of users and companies.

Viewing Account Details

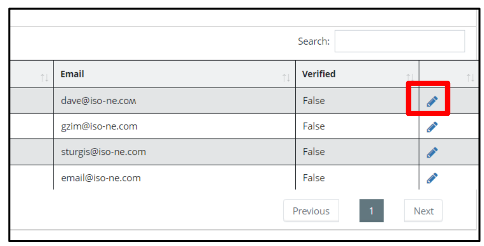
Account details include name, email, title, and phone numbers.

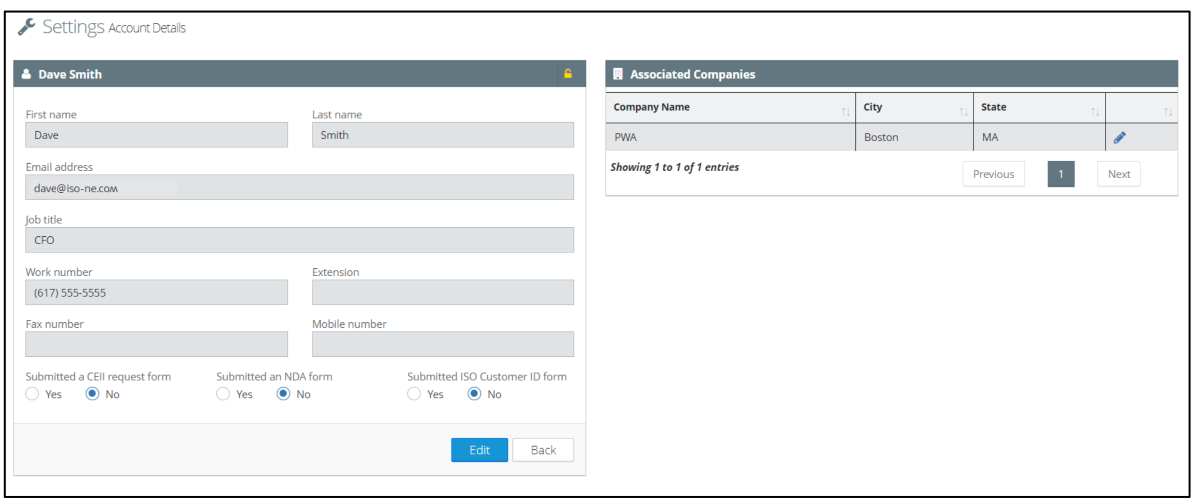
To view account details:

1. Click **Settings > Manage Accounts** from the navigation menu. The *Account Management* page opens.



2. Click the **pencil** in the column on the far right to open a user's *Account Details* page.



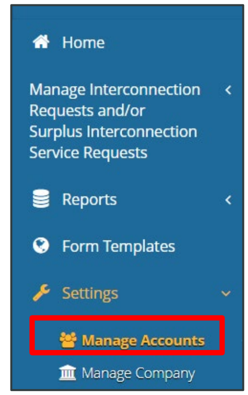


Modifying Account Details

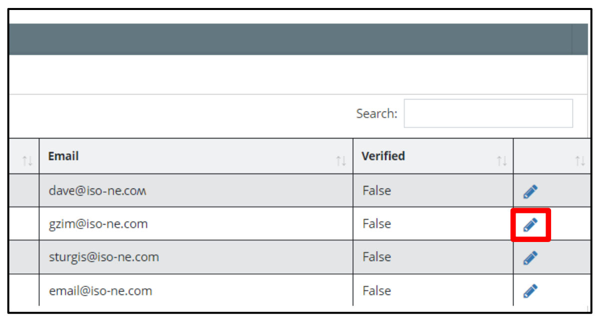
Only a company admin or an account owner can modify their account details. You cannot change your email or the form status designations.

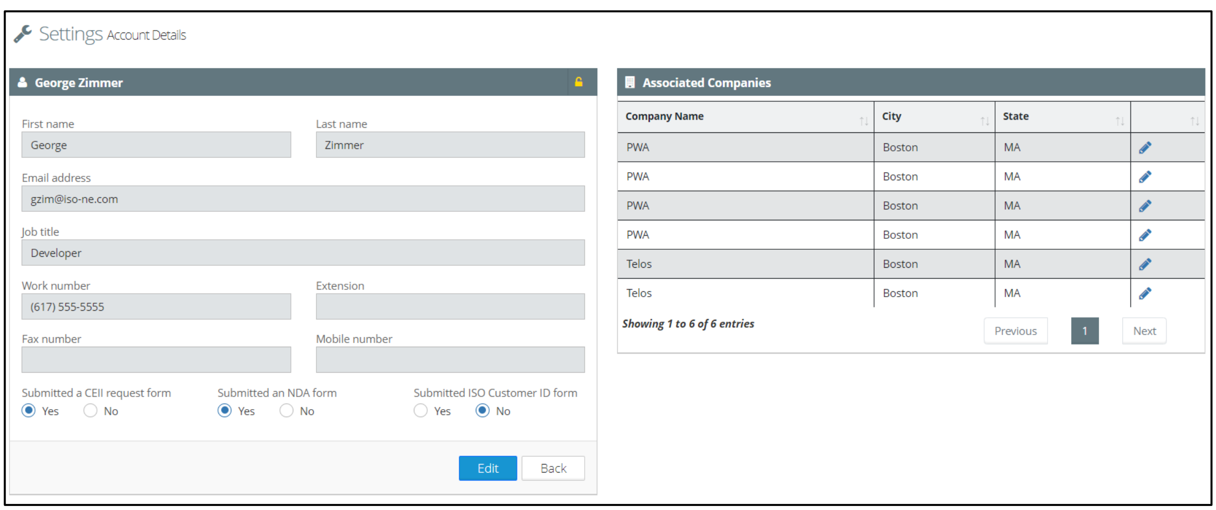
To modify account details:

1. Click **Settings > Manage Accounts** from the navigation menu. The *Account Management* page opens.

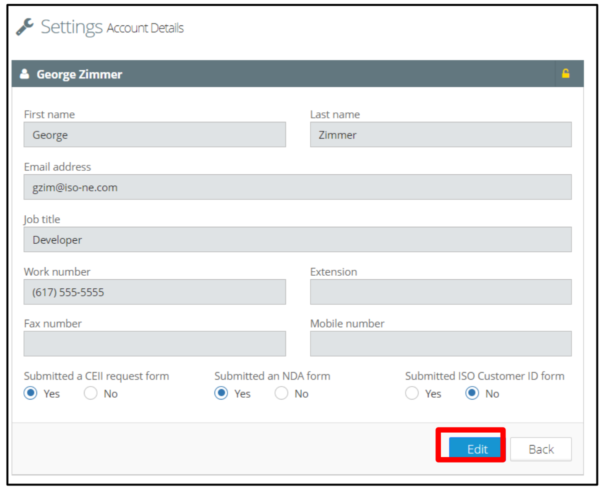


2. Click the **pencil** in the column on the far right to open your *Account Details* page.

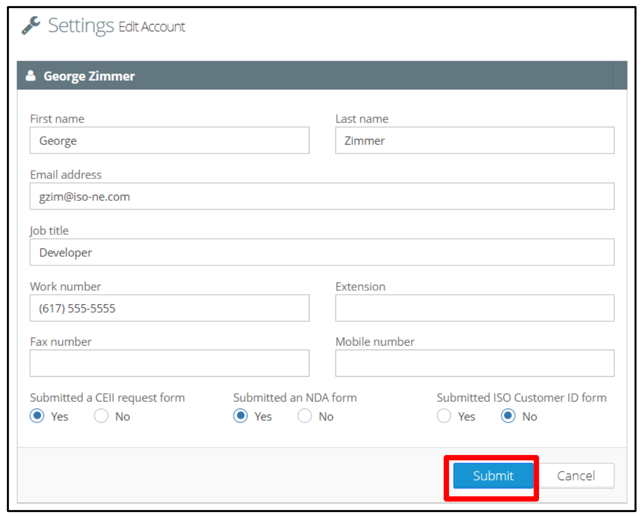




3. Click **Edit**. The *Edit Account* page opens.



4. Make your changes.
5. Click **Submit**. Your changes are applied and you return to the *Account Details* page.

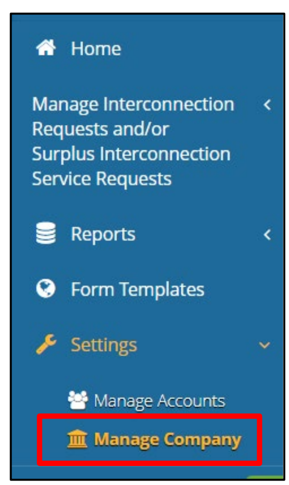


Removing a User Account

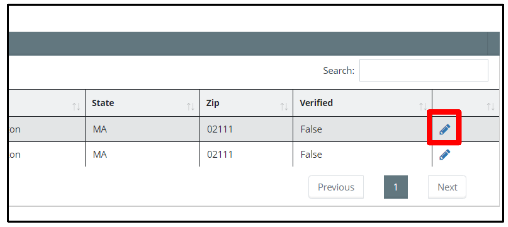
Only company admins can remove a user account. If you want your account removed and you do not have the company admin role, you need to contact a company admin for your company.

To remove a user account:

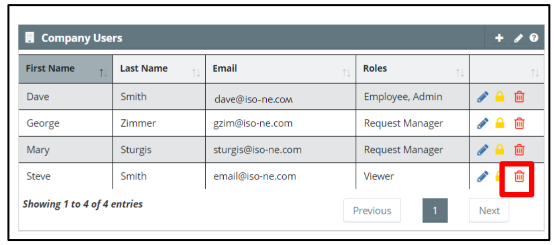
1. Click **Settings > Manage Company** from the navigation menu. The *Company Management* page opens.



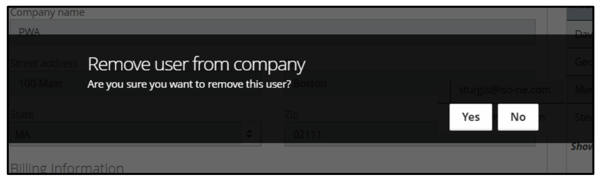
2. Click the **pencil** for the company that has the user you want to remove. The *Company Details* page opens.



3. Click **Remove user** in the *Company Users* table for the user you want to remove. A removal confirmation opens.



4. Click **Yes** to confirm the removal. You return to the *Company Details* page. The user is removed.



Changing Your Password

You need to change your IRTT password every 90 days. If you forget your password or your password expires, see [Resetting a Lost Password](#).

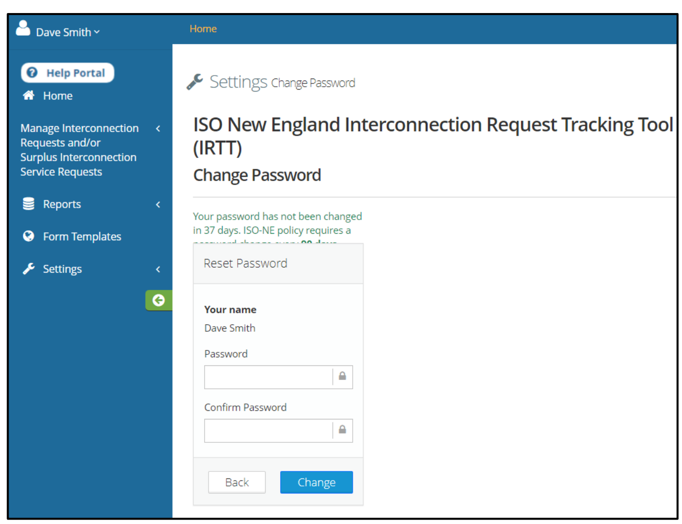
To change your password:

1. Click **Change Password** in the top right corner of IRTT. The *Change Password* page opens.

2. Type your new password in the **Password** and **Confirm Password** fields.

   Your IRTT password must contain more than six characters, at least one number, at least one upper and lower case letter, and at least one special character.

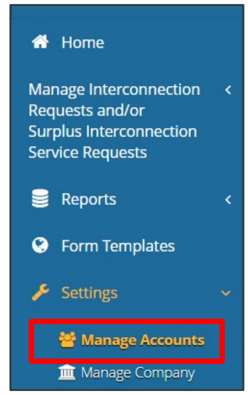
3. Click **Change**. Your password changes.



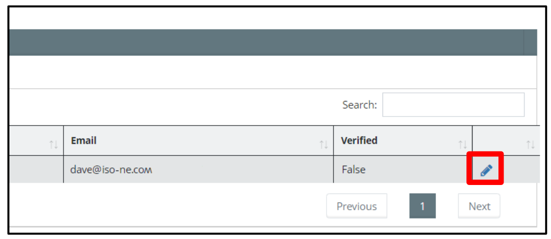
Company admins can reset a password on a user's behalf.

To reset a password:

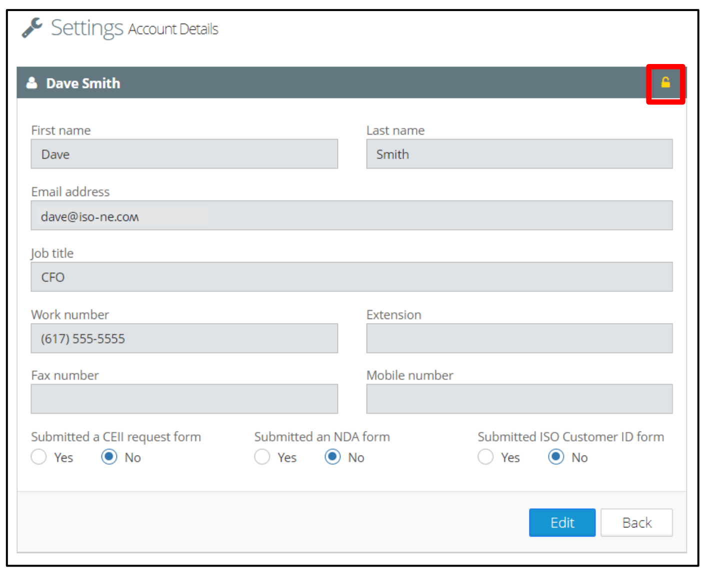
1. Click **Settings > Manage Accounts** from the navigation menu. The *Settings Account Management* page opens.



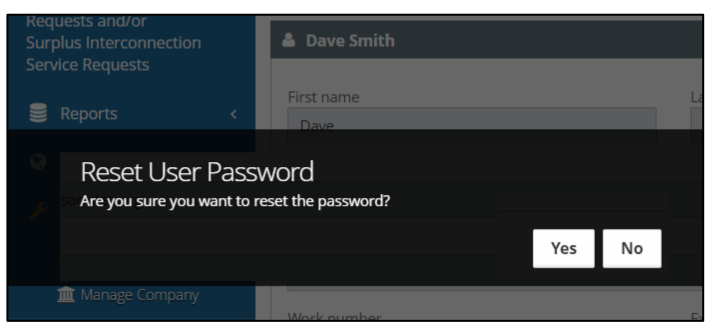
2. Click the **pencil** in the column on the far right to open the *Account Details* page.



3. Click the **gold padlock** (Reset password button).

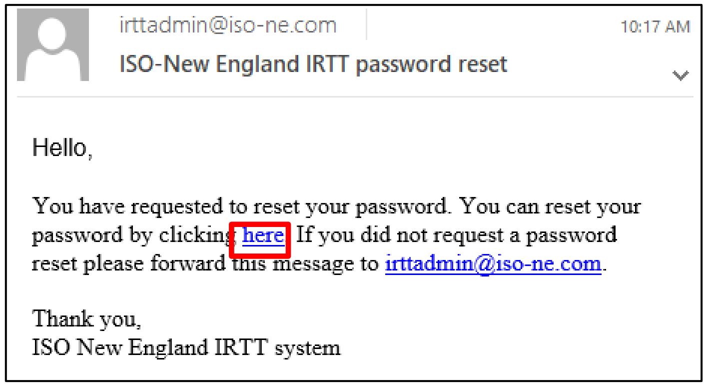


4. Click **Yes** to reset your password. IRTT sends you an email from IRTTAdmin@iso-ne.com (an unmonitored email address) which contains a link to reset the password.



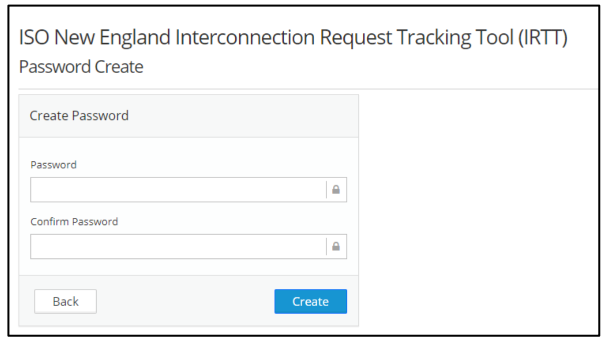
5. Click the **here** link.

   Please check you spam folder if you do not see the email in your inbox. Contact IRTT@iso-ne.com if you do not receive the email.



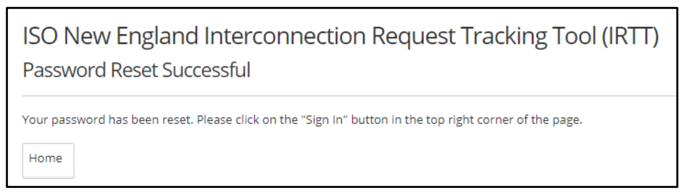
6. Type a new password and confirm it.

   Your IRTT password must contain more than six characters, at least one number, at least one upper and lower case letter, and at least one special character.



7. Click **Reset**. The *Password Reset Successful* screen displays.

   You can now sign in to IRTT using the new password.

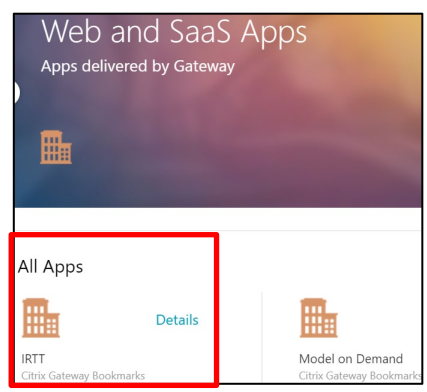


Resetting a Lost Password

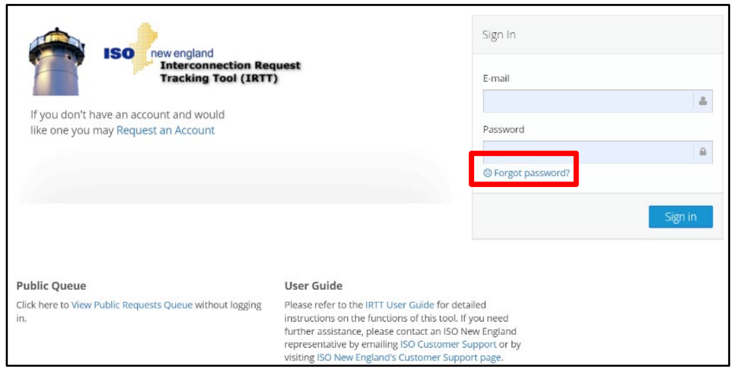
If you forget your password or your password expires, you will need to reset it.

To reset a forgotten or expired password:

1. Navigate to https://portal.iso-ne.com. The ISO New England portal displays.
2. Select the **IRTT** app. The IRTT sign in screen displays.

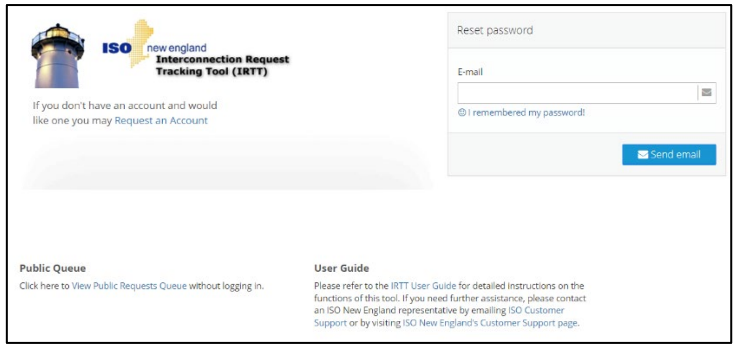


3. Click **Forgot password?**. The *Reset* password screen displays.



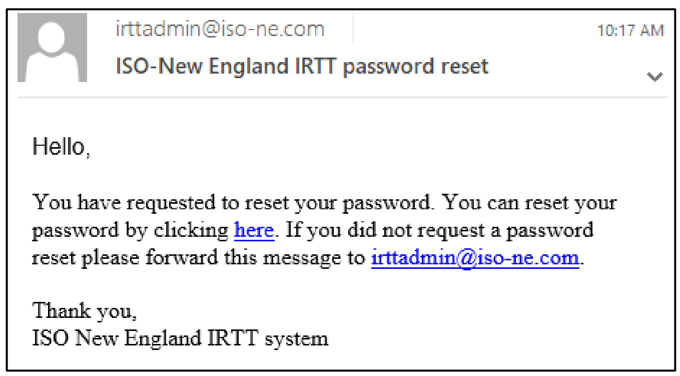
4. Type the email address that you registered with IRTT and click **Send email**. IRTT sends password reset email from IRTTAdmin@iso-ne.com (an unmonitored email).

   Click **I remembered my password** if you want to return to the sign in screen without a password reset.



5. Click the **here** link.

   Please check you spam folder if you do not see the email in your inbox. Contact IRTT@iso-ne.com if you do not receive the email.

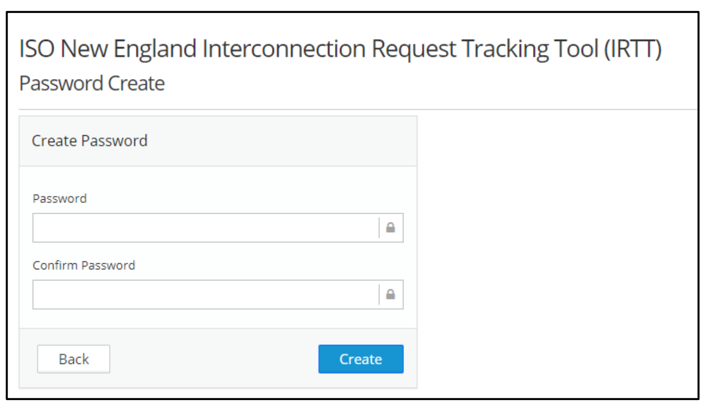


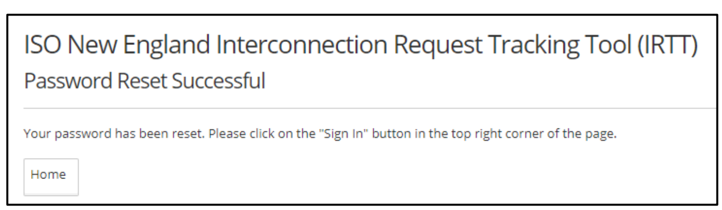
6. Type a new password and confirm it.

   Your IRTT password must contain more than six characters, at least one number, at least one upper and lower case letter, and at least one special character.

7. Click **Reset**. The *Password Reset Successful* screen displays.

   You can now sign in to IRTT using the new password.



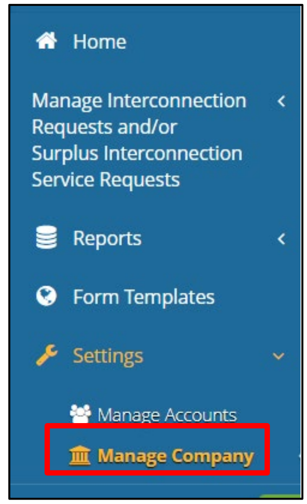


Modifying a User Account Role

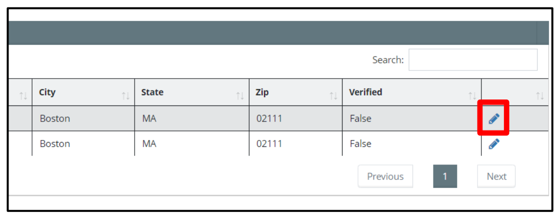
Company admins can change the role of a user account after it has been created. The role assigned to a user account determines the permissions of that account.

To modify a user role:

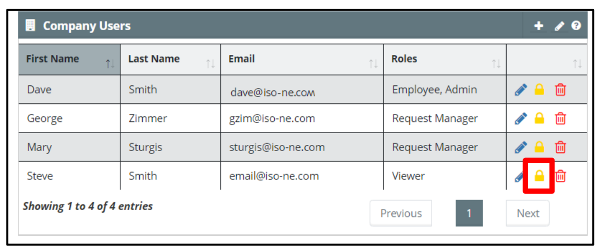
1. Click **Settings > Manage Company** from the navigation menu. The *Company Management* page opens.



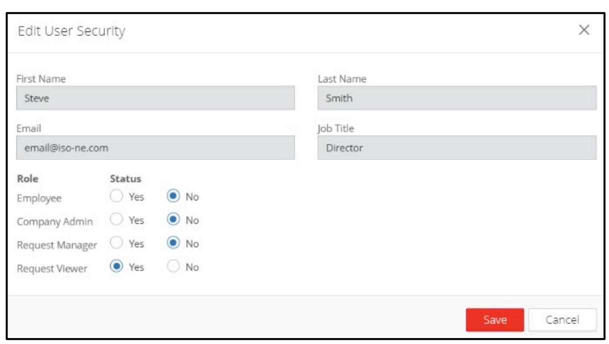
2. Click the **pencil** for the company that has the user whose role you want to modify. The *Company Details* page opens.



3. Click **gold padlock** (Edit security button) in the *Company Users* table for the user you want to modify. The *Edit User Security* dialog box opens.



4. Select **Yes** for the roles that you want and **No** for roles that should be removed and click **Save**.



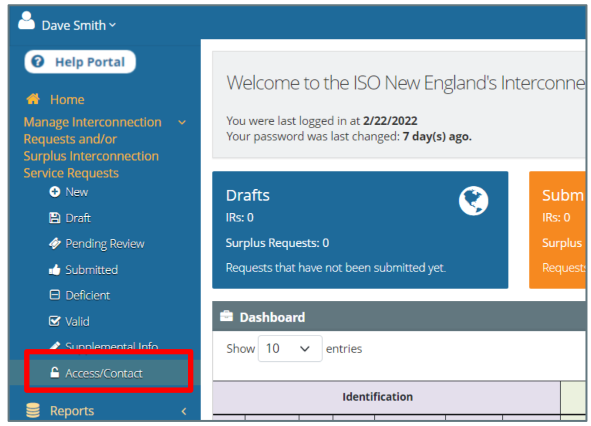
The Company Details page opens and the user's newly assigned role(s) are displayed in the *Company Users* table.

Managing Access to Interconnection Requests

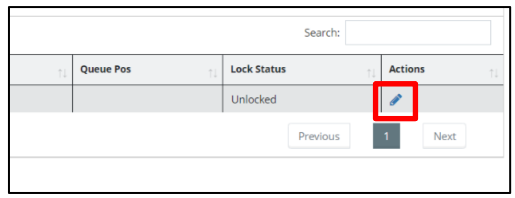
Company admins can manage access to interconnection requests. This restricts who gets to view or take action on a request.

To manage interconnection requests:

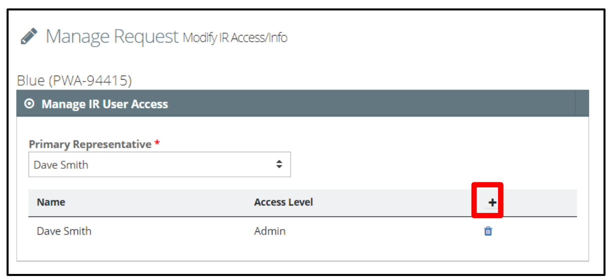
1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Access Contact** from the navigation menu. The *Access Contact Info* page opens.



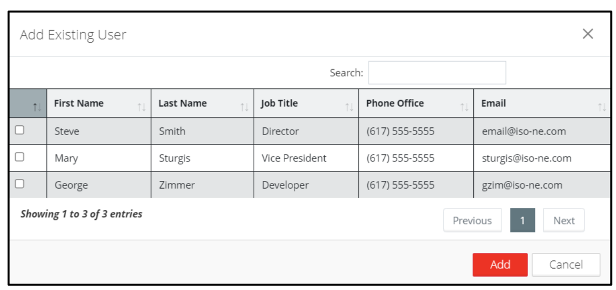
2. Click the **pencil** for the interconnection request that you want to grant a user access to. The *Modify IR Access/Info* page opens.



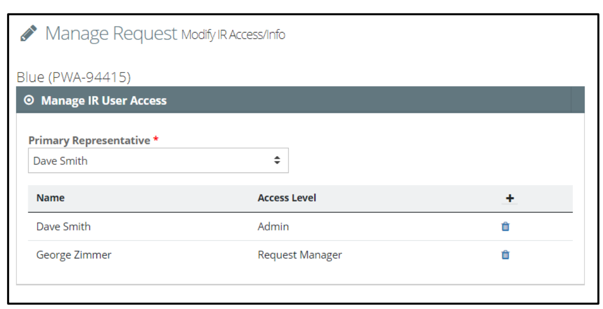
3. Click **Add user** **+** in the *Manage IR User Access* table. The *Add Existing User* dialog box opens.



4. Select the user(s) that you want to have IR access and click **Add**.



The *Manage Request Modify IR Access/Info* page opens and the *Manage IR User Access* table displays the added user(s).



Communications

IRTT sends event driven emails to users that submitted an interconnection request and users that are assigned to an interconnection request. The Primary Representative is the primary contact person for a project. You can change the Primary Representative in IRTT.

IRTT system-generated emails come from the IRTTAdmin@iso-ne.com mail box. This mail box is not monitored. If you have questions about a particular message, please contact an ISO New England representative at IRTT@iso-ne.com.

The following are sample notifications generated by IRTT:

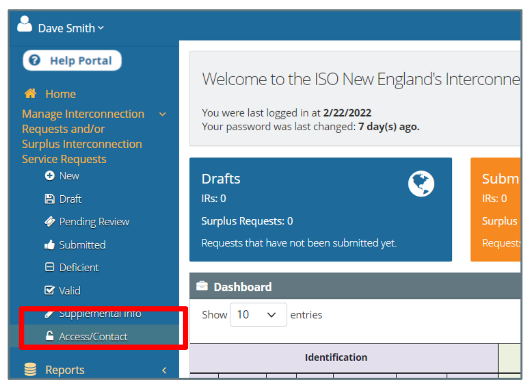
- The ISO has successfully received a customer's interconnection request.
- The ISO deems a request deficient. This notice acknowledges ISO-NE's receipt of the request to the customer and provides deficiency details.
- The ISO determines a request to be valid.

Managing the Primary Representative of an Interconnection Request

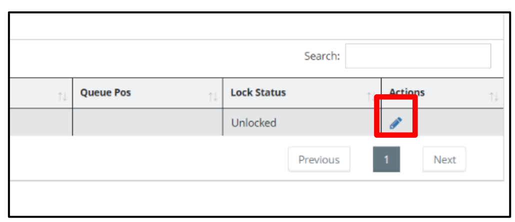
The company admin can change the primary representative for an interconnection request.

To change the primary representative for an interconnection request:

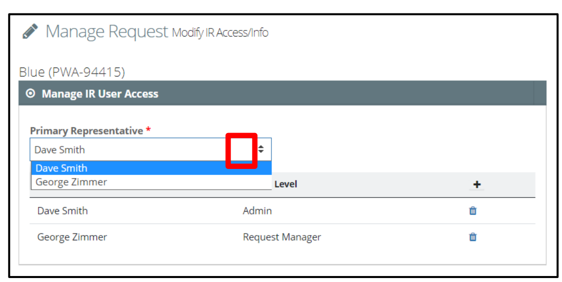
1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Access Contact** from the navigation menu. The *Access Contact Info* page opens.



2. Click the **pencil** for the interconnection request that you want to change the primary representative for. The *Modify IR Access/Info* page opens.

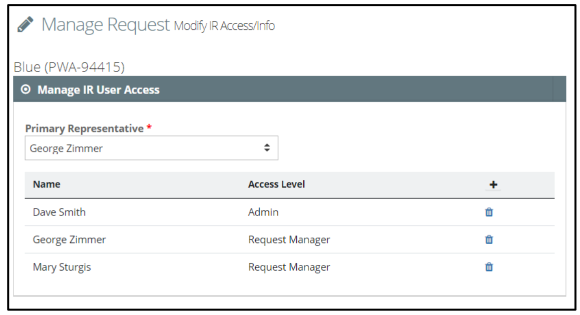


3. Click **Primary Representative** drop-down list in the *Manage IR User Access* table and select a user.



4. Click **Yes** to confirm the new primary representative.

The *Manage Request Modify IR Access/Info* page opens and the *Manage IR User Access* table displays the new primary representative.



Managing Companies

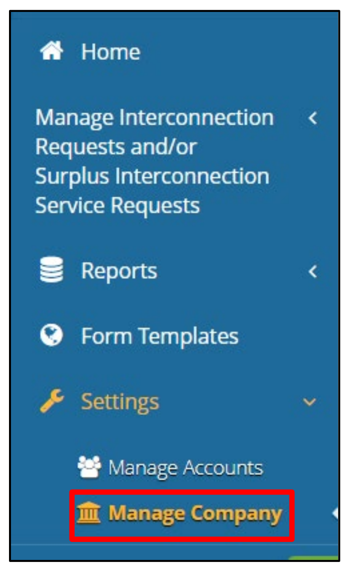
IRTT enables you to create, add existing, or remove subsidiary companies from within the system. It is important to keep parent companies and subsidiaries organized. If you accidentally submit an interconnection request from the wrong company, this could lead to delays with the request. You may have to resubmit the request entirely. Company admins can also edit company details. For more information, see *Modify my company address* in the Help Portal.

Creating a Subsidiary Company

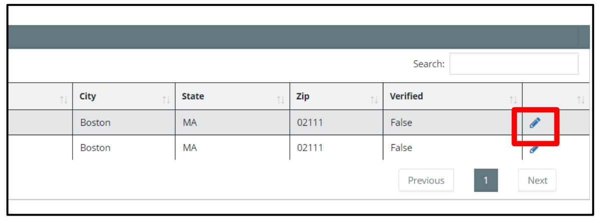
You can create subsidiary companies for a parent company. Only company admins have this ability.

To create a subsidiary company:

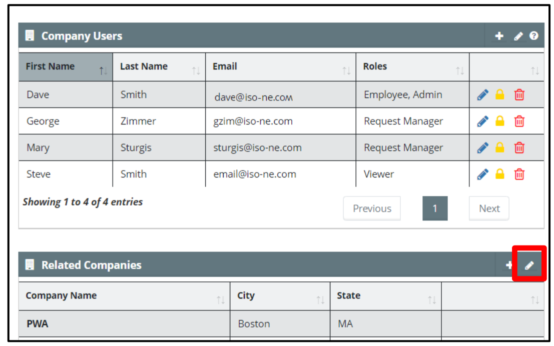
1. Click **Settings > Manage Company** from the navigation menu. The *Company Management* page opens.



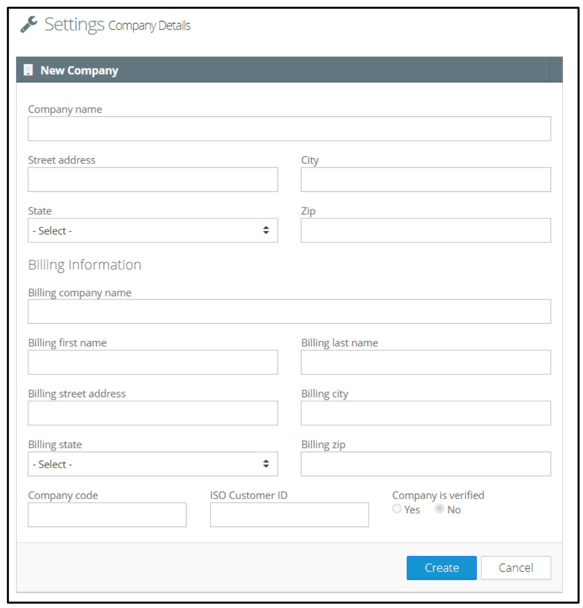
2. Click the **pencil** for the company that you want to add a subsidiary to. The *Company Details* page opens.



3. Click **Create company** in the *Related Companies* table. The *Company Details* page opens.



4. Provide the new company details and click **Create**. The *Company Management* page opens with the new company listed.

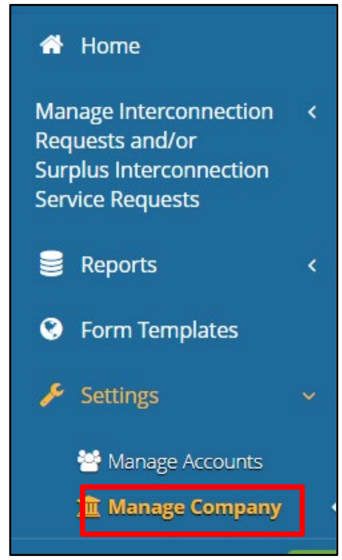


Adding an Existing Subsidiary Company

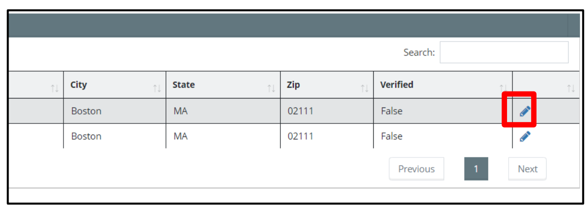
If a company already exists and you want to add it as a subsidiary, you can do so. Only individuals that are company admins at both companies can perform this task. IRs that are in progress remain with the company where they were created. For more information about transferring an IR between companies, see *Transfer an IR to another company* in the Help Portal.

To add an existing subsidiary company:

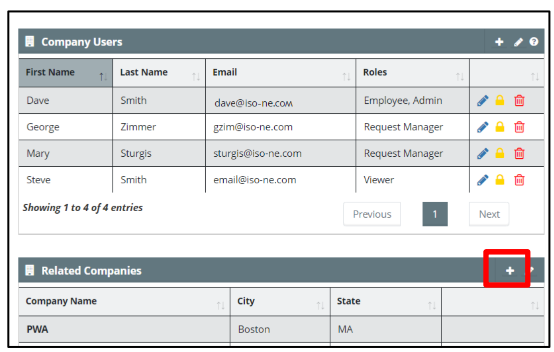
1. Click **Settings > Manage Company** from the navigation menu. The *Company Management* page opens.



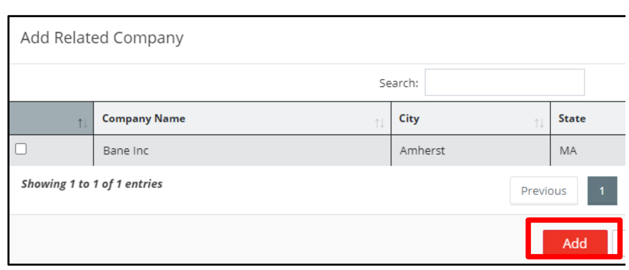
2. Click the **pencil** for the company that you want to add an existing subsidiary to. The *Company Details* page opens.



3. Click **Add company** in the *Related Companies* table. The *Add Related Company* dialog box opens.



4. Select the company you want to relate and click **Add**. The selected company appears in the *Related Companies* table.

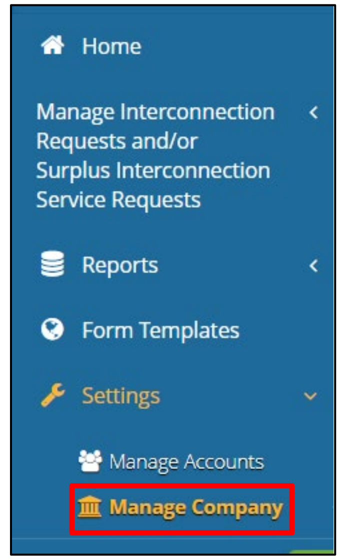


Removing a Subsidiary Company

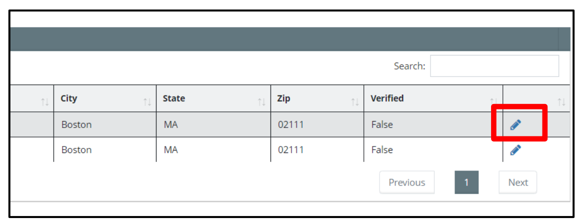
If you no longer want a subsidiary related to a company, you can remove it. Only company admins of the parent company can perform this task.

To remove a subsidiary company:

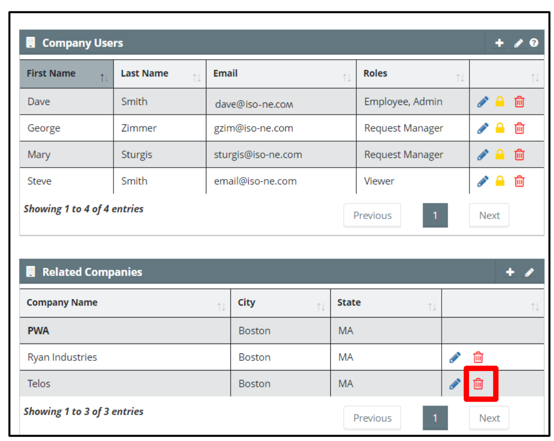
1. Click **Settings > Manage Company** from the navigation menu. The *Company Management* page opens.



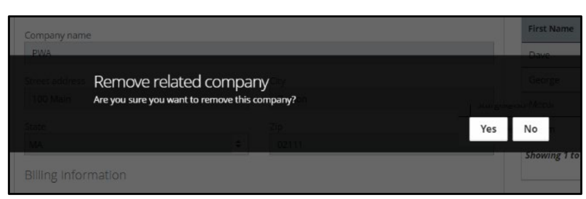
2. Click the **pencil** for the parent company that you want to remove a subsidiary from. The *Company Details* page opens.



3. Click **Remove company** in the *Related Companies* table. A removal confirmation opens.



4. Click **Yes** to confirm subsidiary removal. The *Company Details* page opens with the subsidiary removed from the *Related Companies* table.



Submitting Interconnection Requests

IRTT allows customers to draft and submit interconnection requests, correct or cure deficient interconnection requests, and view valid requests. The Dashboard and Status Area located on the IRTT Home page indicate an interconnection request's status and which phase a particular request is in.

An interconnection request's status changes at various points throughout the processing lifecycle. A change in status triggers IRTT to send notifications and alerts to users to inform them when an action must occur, such as when a deficiency cure period starts.

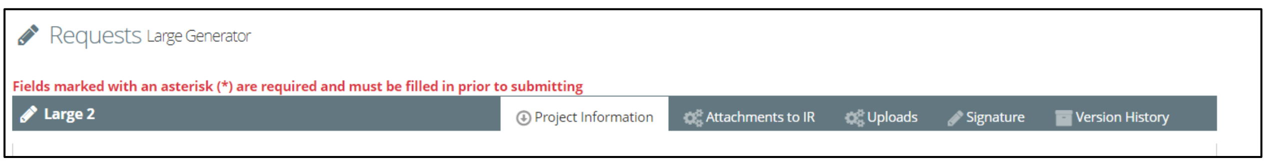
For more information on creating IRs, see *Create a new (draft) interconnection request or edit existing one in IRTT tutorial –Video* in the Help Portal. In addition, the Help Portal provides multiple topics regarding interconnection process.

Submitting a Large Generator Request

A new large generator request can be submitted by company admins or request managers. Once you create a request, there are four tabs that you need to complete in order to submit the request:

- **Project Information**: Basic information regarding the request
- **Attachments to IR**: Technical data supported by studies and their attachments
- **Uploads**: Repository for required documentation.
- **Signature**: The final signatures for the request.

The **Version History** tab provides an ongoing record of the changes made to the request.



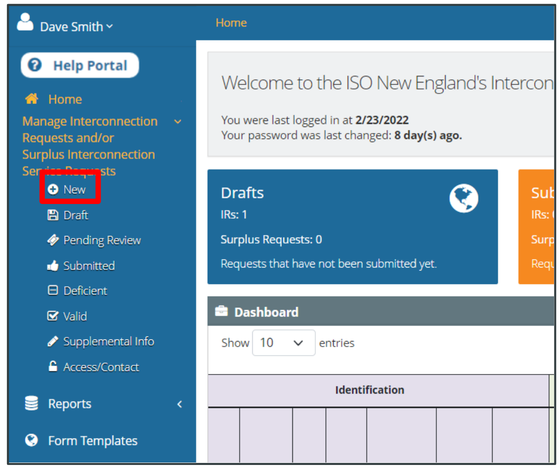
During the creation of a large generator request, you can click the **Save** button to save your work to finish at a later time. Click the **Close** button at the bottom of the page to close the request and return to the *Drafts IR* page. Make sure you save your work before you close the request. You can return to work on the request draft by clicking **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Draft** in the navigation menu.

For additional information regarding the large generator request, see Schedule 22 Large Generator Interconnection Procedures. For a video tutorial, see *Large IR submission tutorial –Video* in the Help Portal.

Project Information Tab

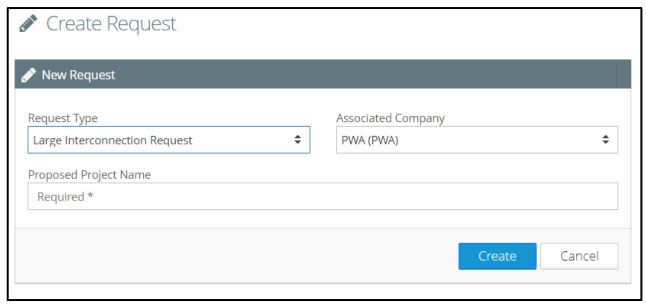
To submit a large generator request:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > New** from the navigation menu. The *Create Request* page opens.

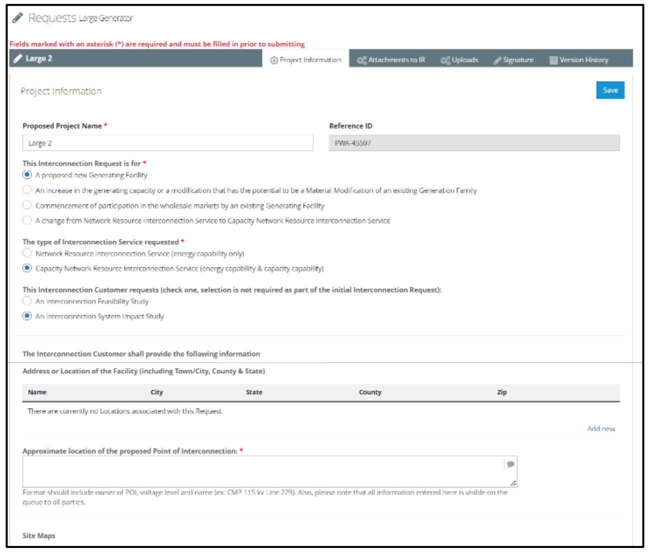


2. Select **Large Interconnection Request** from the *Request Type* drop-down list.
3. Select the **company** from the *Associated Company* drop-down list.

   If you do not see your company on the list, check with your company admin to make sure your account is set up and the appropriate user role is assigned to you before continuing.
4. Type a **name** in the *Proposed Project Name* text box (required).
5. Click **Create**. A draft for the large interconnection request is created with a unique reference ID. The *Requests Large Generator* page opens.



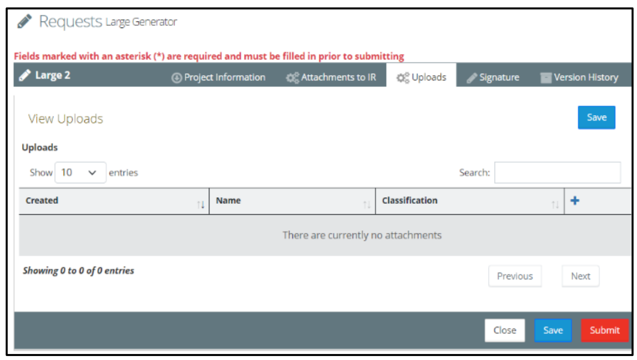
6. Complete the questions and fields on the form. Those with an asterisk are mandatory. The site maps and site control evidence sections require file uploads.



Uploads Tab

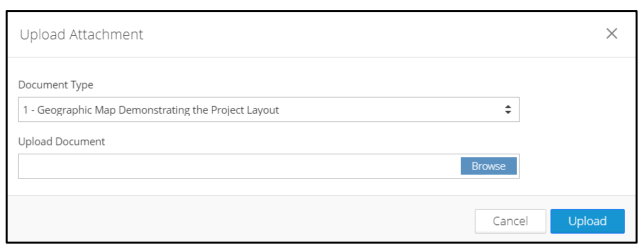
To use the Uploads tab:

1. Click the **Uploads** tab.
2. Click the **Add** button ➕. The *Upload Attachment* dialog box opens.



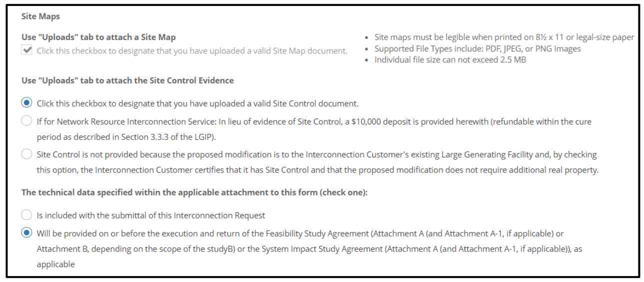
3. Select the **Document Type** from the drop-down list.
4. Click **Browse** to navigate to the file you want to upload.
5. Click **Upload** to add the file. IRTT validates the submission and notifies you via pop-up message of any issues. You will be able to modify the submitted information to correct any noted issues. When complete, the *View Uploads* page displays.

   Repeat steps 2-5 for each document you need to upload.



6. Click the **Project Information** tab. In the *Site Maps* sections, make the appropriate selections regarding the uploaded documents.

   Make sure the remaining project information is complete.

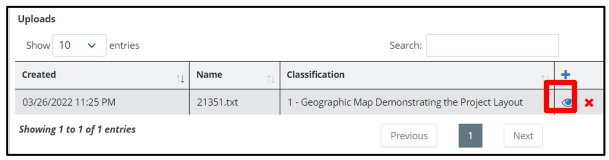


Viewing an Upload

You can view an upload on the *Uploads* tab. Customers cannot delete an upload. If you want an upload deleted, you will need to contact ISO New England. You can upload a similar file type by using a different name.

To view an upload:

1. Click **View** . The upload opens.

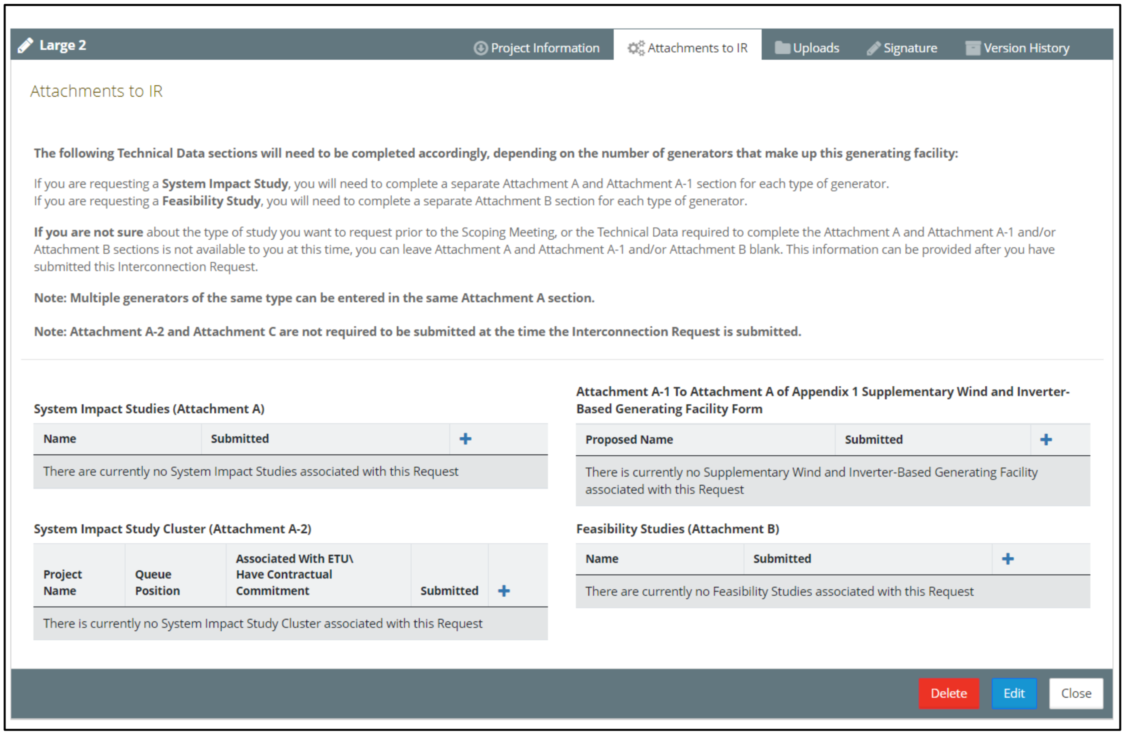


Attachments to IR Tab

For additional information, see *Large IR – Add or update System Impact Study Data (Attachment A*) in the Help Portal.

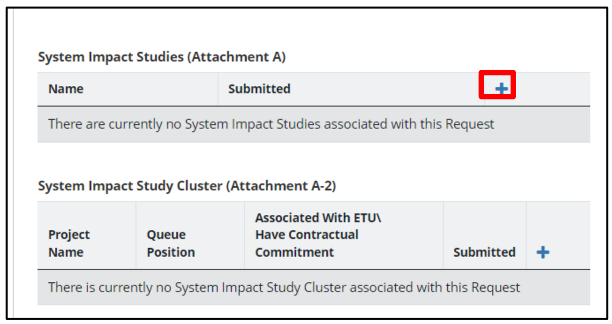
To use the Attachments to IR tab:

1. Click the **Attachments to IR** tab. The type and number of attachments you need to complete on this tab varies depending on the number of generators required. Select the ones that you need.

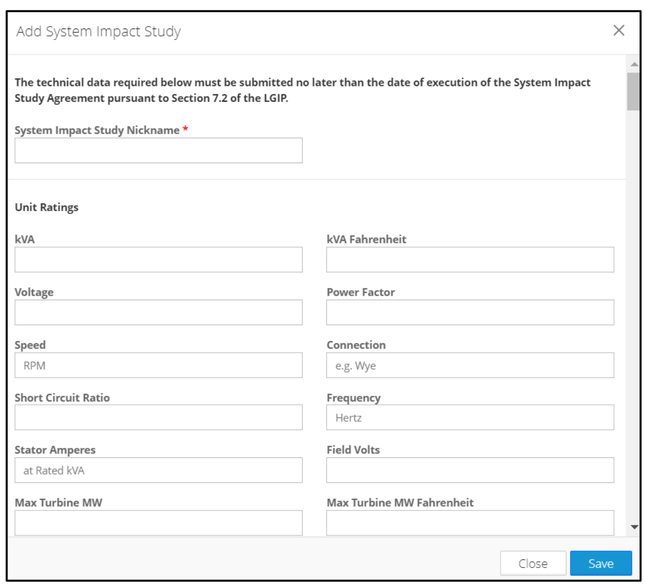


2. Click an **Add** ➕ button for one of the following attachments:
   - System Impact Studies (Attachment A)
   - Attachment A-1 to Attachment A
   - System Impact Study Cluster (Attachment A-2)
   - Feasibility Studies (Attachment B)

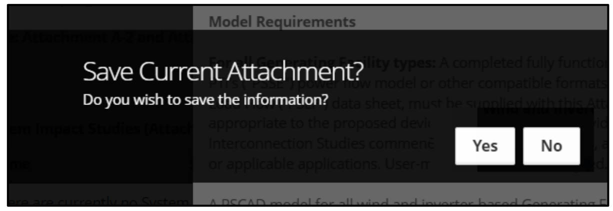
   An attachment page or dialog box opens.



3. Provide the necessary information. Fields with an asterisk are required.
4. Click **Save**.



5. Click **Yes** to confirm the attachment.
6. Repeat steps 2-5 for each attachment that you need.

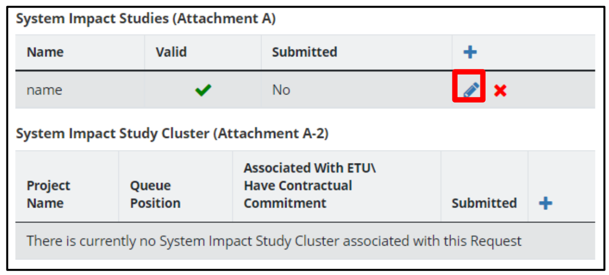


Editing or Deleting an Attachment Record

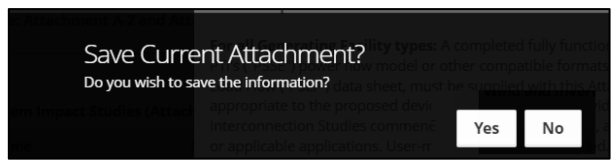
You can edit or delete an attachment that was previously added to the request.

To edit an attachment record:

1. Click **Edit** . The attachment opens.
2. Make the changes you want and click **Save**.

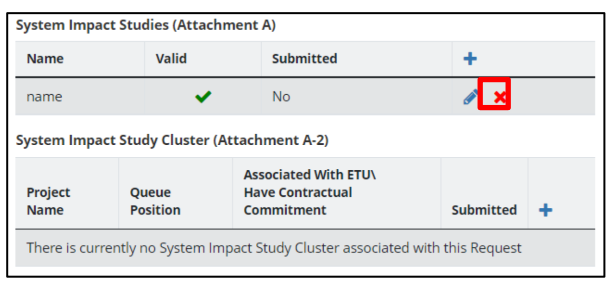


3. Click **Yes** to confirm the attachment edits. The *Attachments to IR* tab reopens.

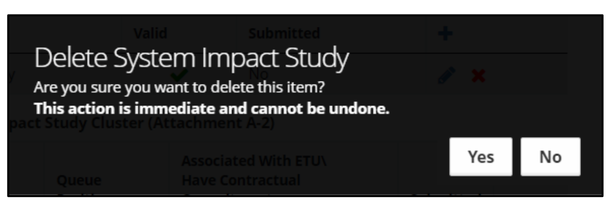


To delete an attachment record:

1. Click **Delete** .



2. Click **Yes** to confirm the delete. The *Attachments to IR* tab reopens.

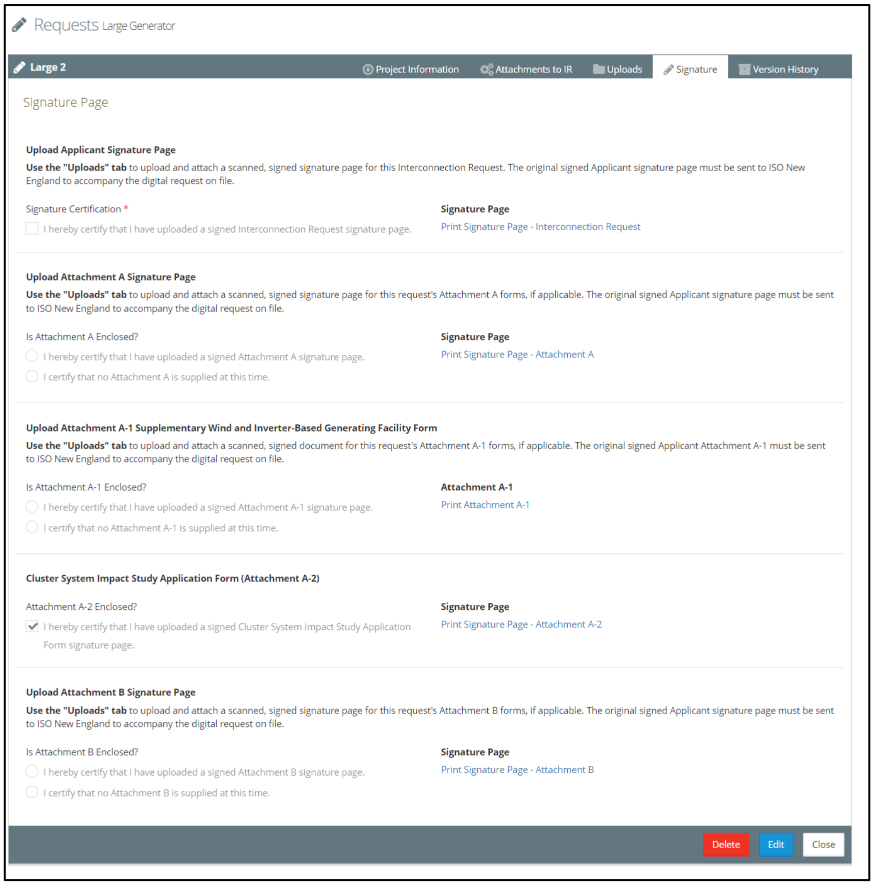


Signature Tab

For more information about signatures, see *Original Document with Wet Signatures* in the Help Portal.

To use the Signature tab:

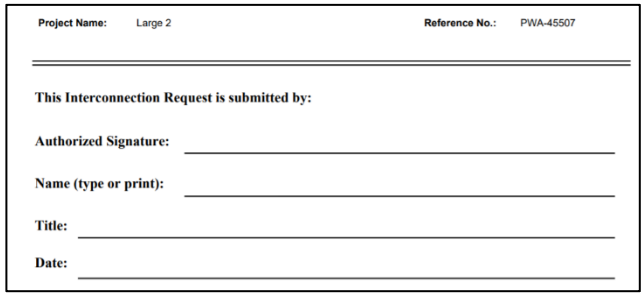
1. Click the **Signature** tab.



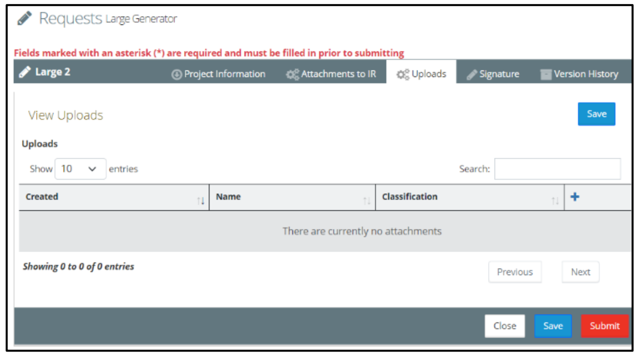
2. Click **Edit**. Fields with an asterisk are required. There is a print signature link for each type of attachment.

3. Click **Print Signature Page – Interconnection Request**. The signature page opens in a new browser tab.

4. Download the page, print, sign, and scan it.

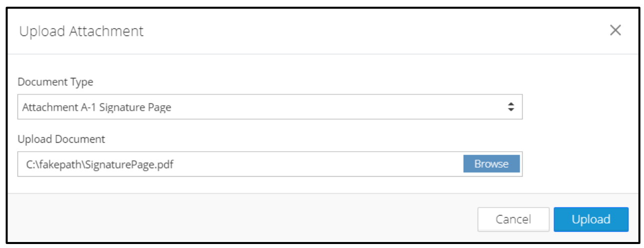


5. Click the **Uploads** tab.
6. Click the **Add** button . The *Upload Attachment* dialog box opens.



7. Select **Attachment A-1 Signature Page** from the *Document Type* drop-down list.
8. Click **Browse** to navigate to the file you signed and scanned to upload.
9. Click **Upload** to add the file. IRTT validates the submission and notifies you via a pop-up message of any issues. You will be able to modify the submitted information to correct any noted issues. When complete, the *View Uploads* page displays.

   Repeat steps 6-9 for attachment type you used for the interconnection request.

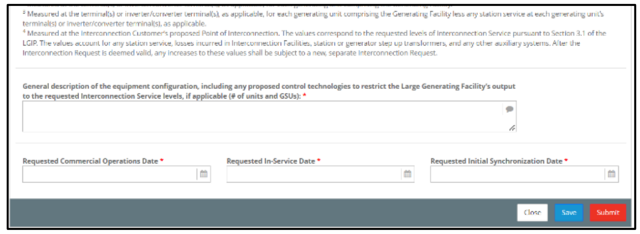


Submitting the Request

When you finish filling out the Project Information, Attachments to IR, and Signature tabs, you can submit the request. For more information, see the *Interconnection Request submittal verification* in the Help Portal.

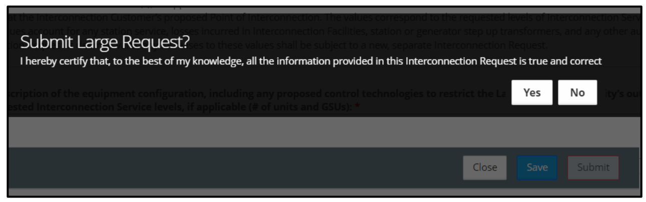
To submit the request:

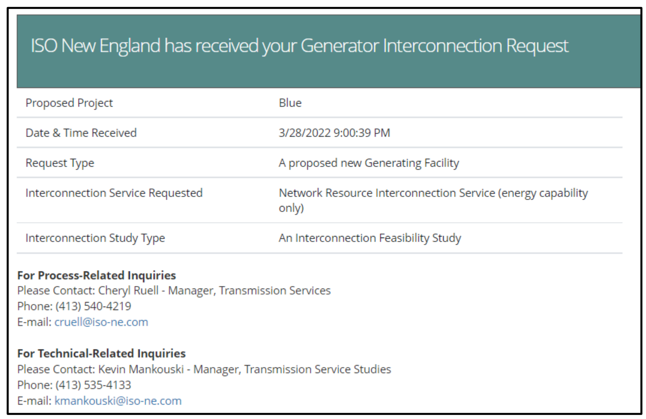
1. Click the **Project Information** tab and click **Submit**.



2. Click **Yes** to confirm the interconnection request.

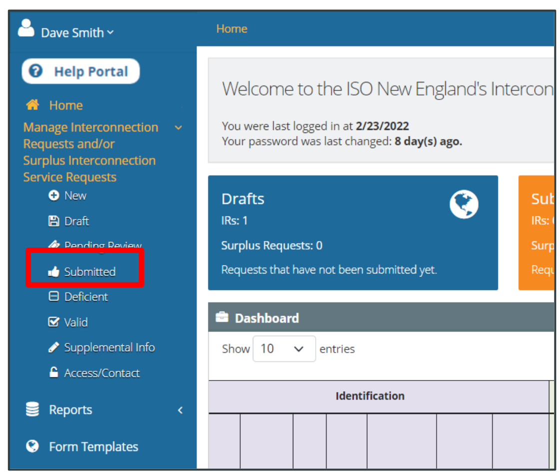
   The interconnection request is submitted and a confirmation page displays. It may take a minute for the page to load.





IRTT notifies the [primary representative](#) via email that the interconnection request was submitted.

You can view this request by clicking **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Submitted**.

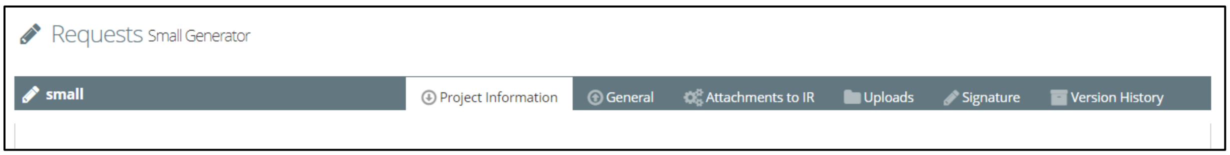


Submitting a Small Generator Request

A new small generator request can be submitted by company admins or request managers. Once you create a request, there are five tabs that you need to complete in order to submit the request:

- [Project Information](#): Basic information regarding the request
- [General](#): Details for the Uploads tab.
- [Attachments to IR](#): Technical data supported by studies and their attachments.
- [Uploads](#): Repository for required documentation.
- [Signature](#): The final signatures for the request.

The **Version History** tab provides an ongoing record of the changes made to the request. For more information about submitting a Small Generator Request, see the *Small IR submission tutorial – Video* in the Help Portal.



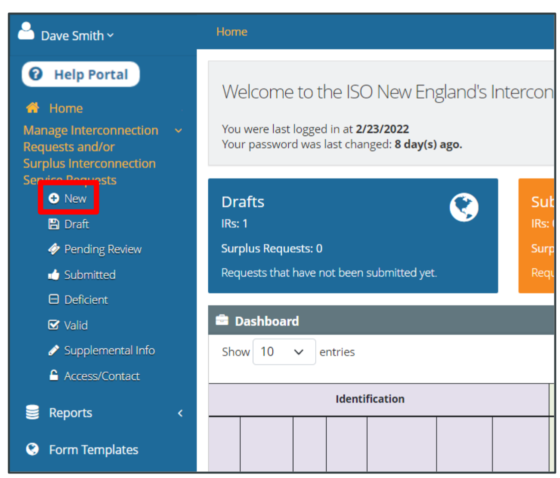
During the creation of a small generator request, you can click the **Save** button to save your work to finish at a later time. Click the **Close** button to close the request and return to the *Drafts IR* page. Make sure you save your work before you close the request. You can return to work on the request draft by clicking **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Draft** in the navigation menu.

For additional information regarding the small generator request, see Schedule 23 Small Generator Interconnection Procedures.

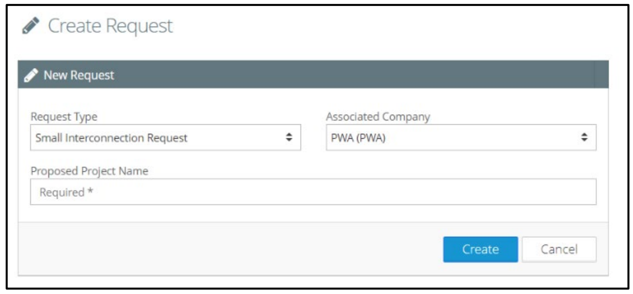
Project Information Tab

To submit a small generator request:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > New** from the navigation menu. The *Create Request* page opens.



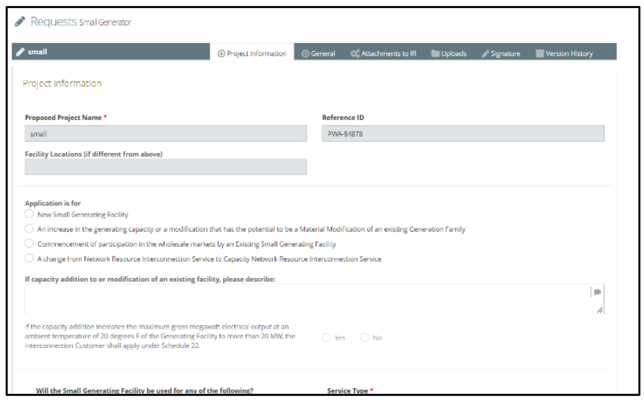
2. Select **Small Interconnection Request** from the *Request Type* drop-down list.



3. Select the **company** from the *Associated Company* drop-down list.

   If you do not see your company on the list, check with your company admin to make sure your account is set up and the appropriate user role is assigned to you before continuing.

4. Type a **name** in the *Proposed Project Name* text box (required).
5. Click **Create**. A draft for the small interconnection request is created with a unique reference ID. The *Requests Small Generator* page opens.
6. Complete the questions and fields on the form. Those with an asterisk are mandatory. The site maps and site control evidence sections require file uploads.

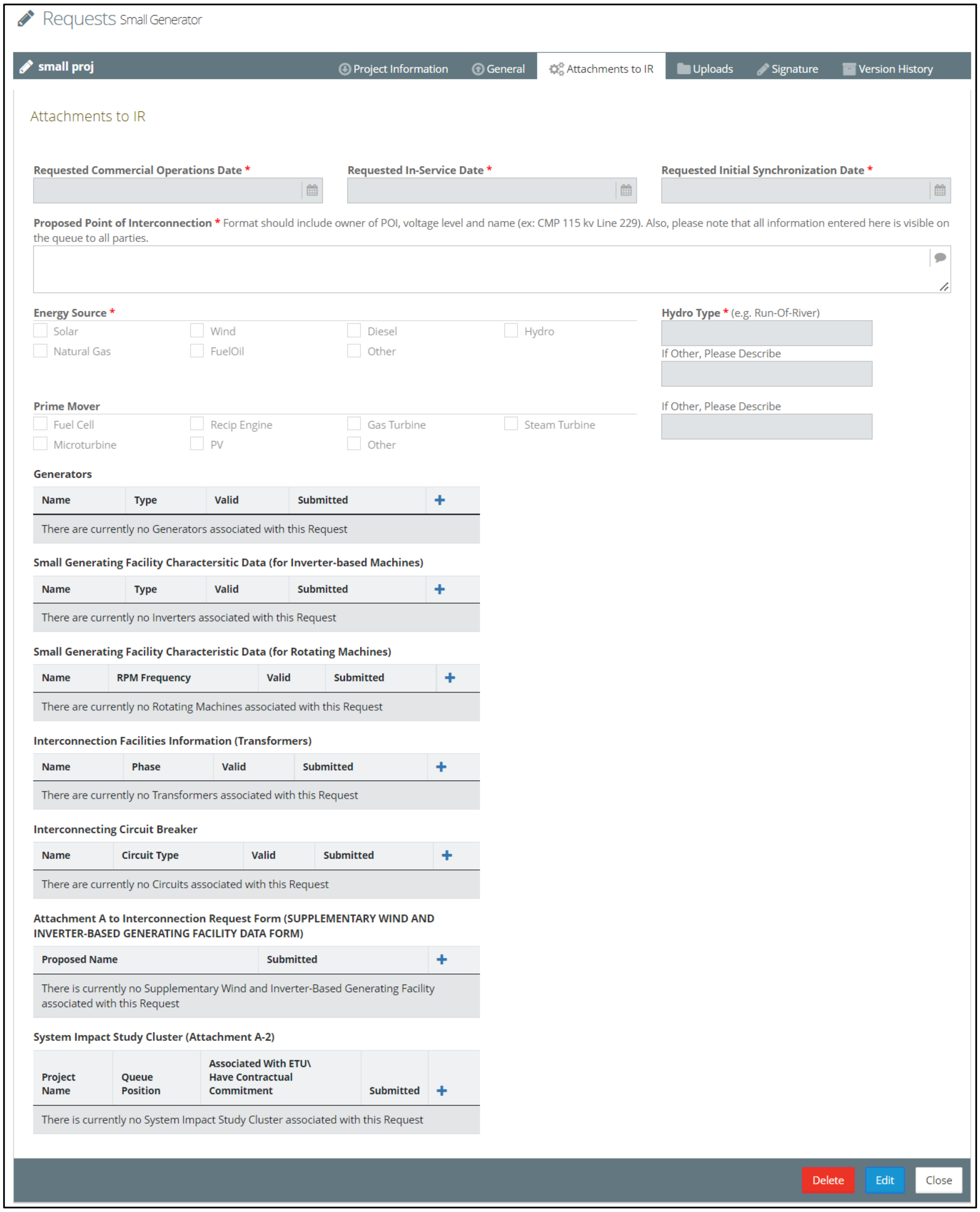


Attachments to IR Tab

For more information, see *Small IR-Submitting technical data* in the Help Portal.

To use the Attachments to IR tab:

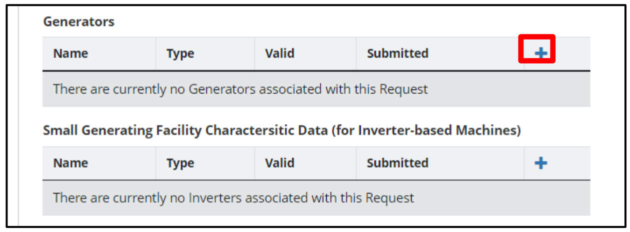
1. Click the **Attachments to IR** tab. The type and number of attachments you need to complete on this tab varies depending on the number of generators required.



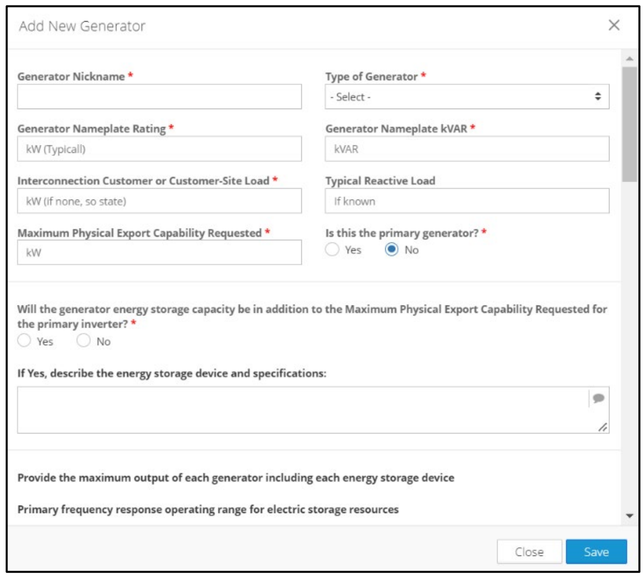
2. Click **Edit** and complete the questions and fields on the form. Those with an asterisk are mandatory.

3. Click the **Add** button for each of the attachments you need to add. The dialog box opens.

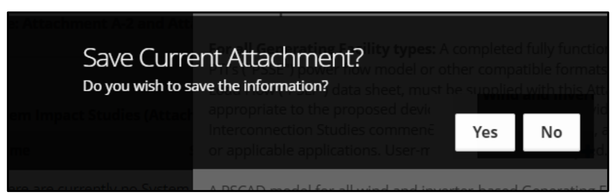
   For more information on submitting generators, see *Small IR – How to add a generator tutorial – Video* in the Help Portal.



4. Provide the necessary information. Fields with an asterisk are required.
5. Click **Save**.

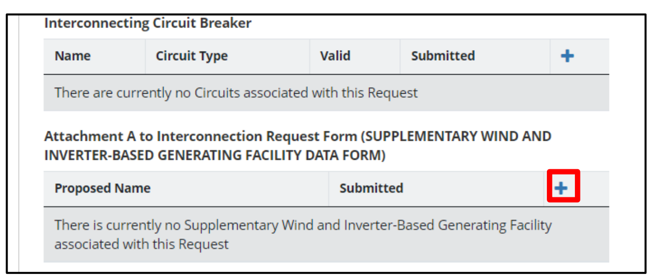


6. Click **Yes** to confirm the attachment. The *Attachments to IR* tab reopens.
7. Repeat steps 3-6 for each attachment.

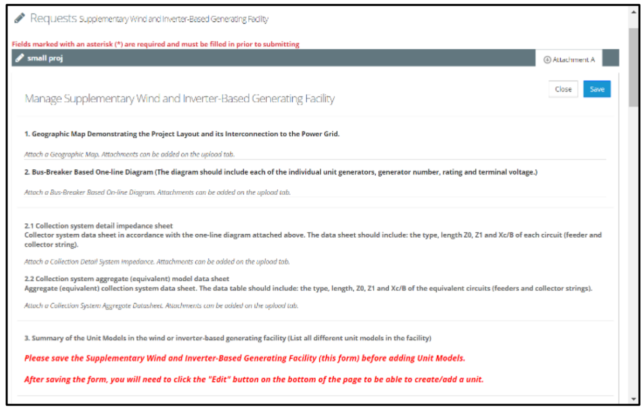


8. Submit *Attachment A to Interconnection Request Form (SUPPLEMENTARY WIND AND INVERTER-BASED GENERATING FACILITY DATA FORM)* by clicking **Add** . The *Manage Supplementary Wind and Inverter-Based Generating Facility* page opens.

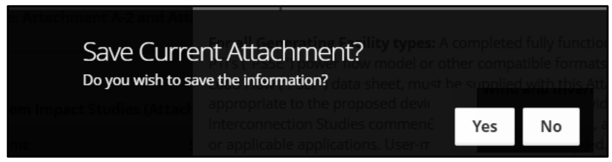
   For more information, see *Supplemental Wind and Inverter-based Generating Facility Form tutorial – Video* in the Help Portal.



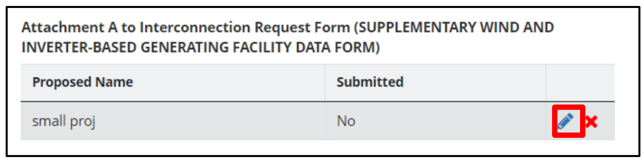
9. Provide the necessary information. Fields with an asterisk are required.
10. Click **Save**.



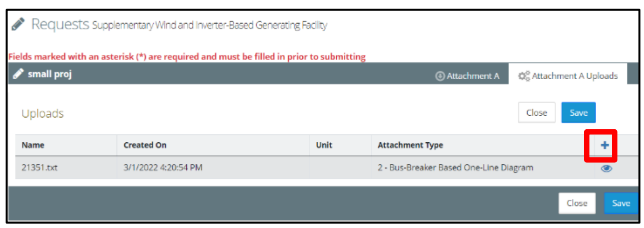
11. Click **Yes** to confirm the attachment. The *Attachments to IR* tab reopens.



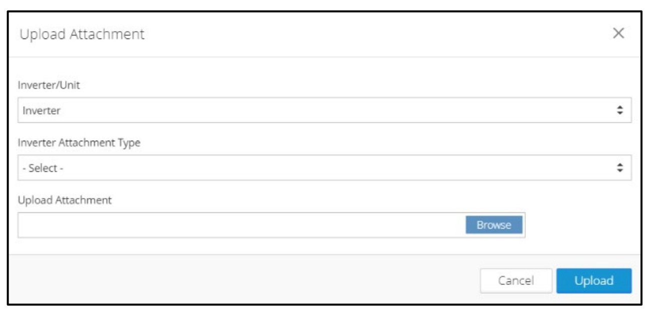
12. Return to the *Attachment A* and click **Edit** . The *Manage Supplementary Wind and Inverter-Based Generating Facility* page reopens.



13. Click **Attachment A Uploads** tab.
14. Click **Add** . The *Upload Attachment* dialog box opens. Use this dialog box to add documents related to the *Attachments to IR* tab.

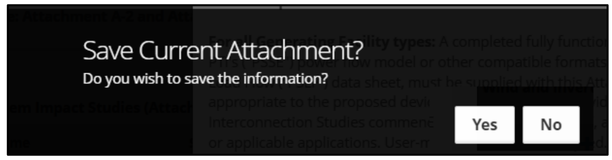


15. Select or click:
    a. **Inverter** or **Inverter Unit** from the drop-down list.
    b. **Inverter Unit Name** from the drop-down list.
    c. **Inverter Attachment Type** from the drop-down list.
    d. **Browse** to select the attachment.
    e. **Upload** to attach the document.

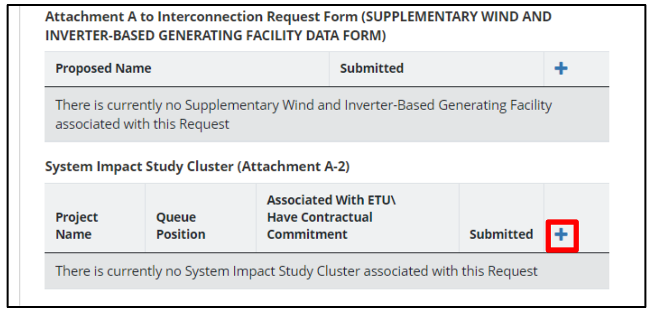


16. Click **Save**.

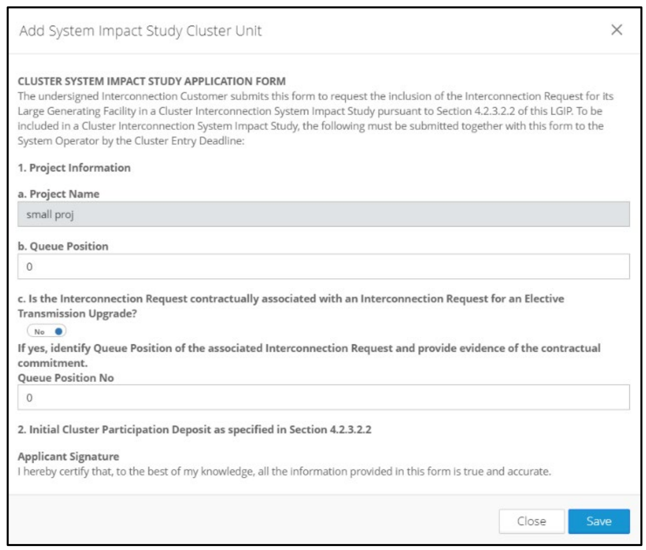
17. Click **Yes** to confirm the attachment. The *Manage Supplementary Wind and Inverter-Based Generating Facility* page reopens.
18. Click **Close**.



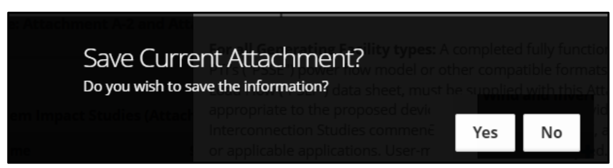
19. Click the *Attachments to IR* tab.
20. Submit *System Impact Study Cluster (Attachment A-2)* by clicking **Add** ➕. The *Add System Impact Study Cluster Unit* dialog box opens.



21. Provide the necessary information. Fields with an asterisk are required.
22. Click **Save**.



23. Click **Yes** to confirm the attachment. The *Attachments to IR* tab reopens.

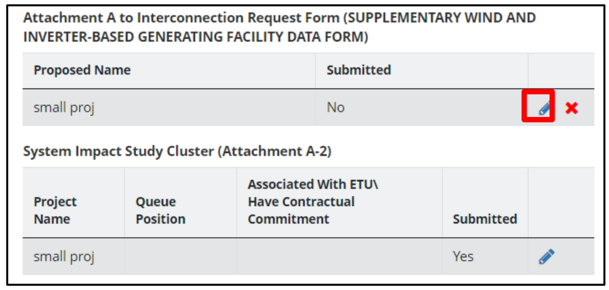


Editing or Deleting Attachment Record

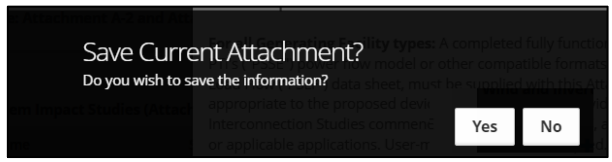
You can edit or delete an attachment that was previously added to the request.

To edit an attachment record:

1. Click **Edit** . The attachment opens.
2. Make the changes you want and click **Save**.

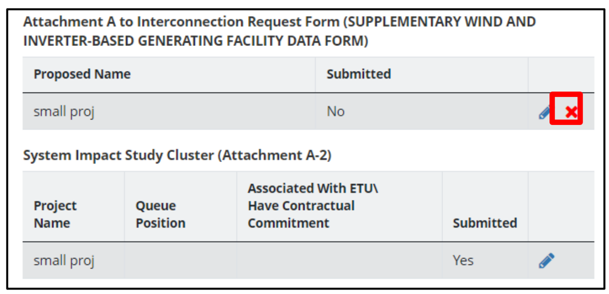


3. Click **Yes** to confirm the attachment edits. The *Attachments to IR* tab reopens.

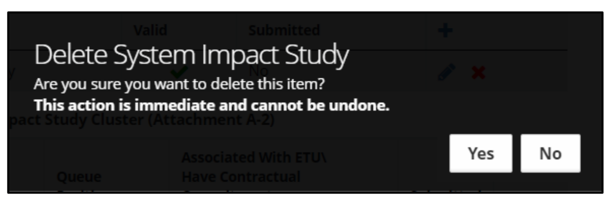


To delete an attachment record:

1. Click **Delete** .



2. Click **Yes** to confirm the delete.

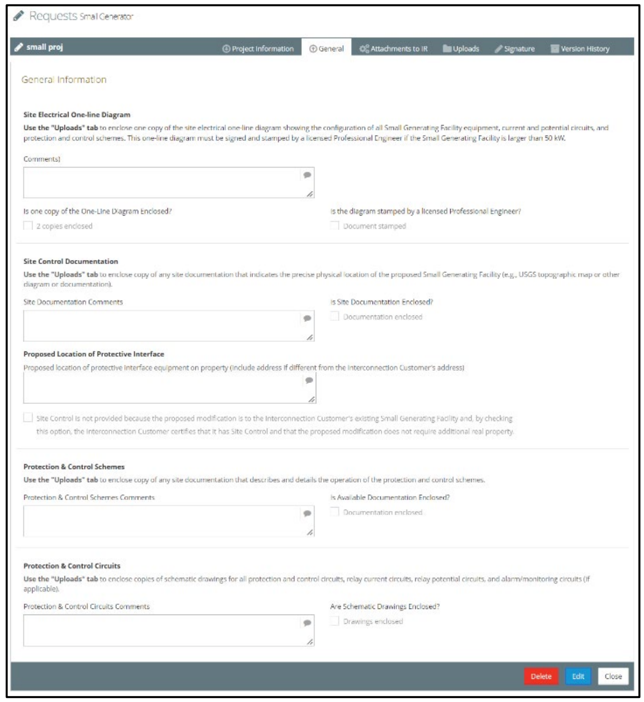


General and Upload Tabs

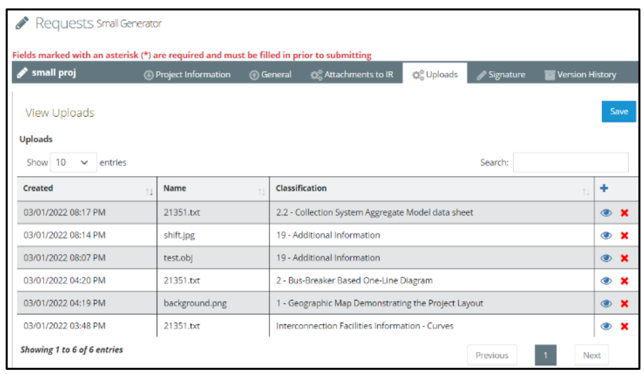
For more information about the General tab, see *Small IR – Upload files to my interconnection request* in the Help Portal.

To use the General and the Upload tabs:

1. Click the **General** tab.
2. Note that each of the following sections requires an upload:
   - Site Electrical One-line Diagram
   - Site Control Documentation
   - Protection & Control Schemes
   - Protection & Control Circuits
3. Click the **Uploads** tab.

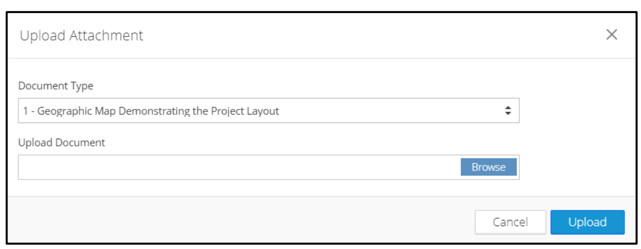


4. Click the **Add** button . The *Upload Attachment* dialog box opens.



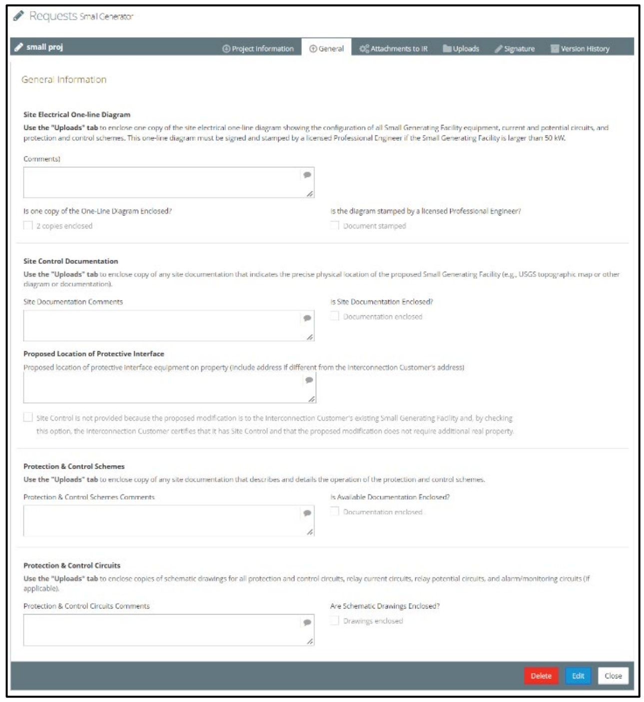
7. Select the **Document Type** from the drop-down list.
8. Click **Browse** to navigate to the file you want to upload.
9. Click **Upload** to add the file.

   IRTT validates the submission and notifies you via pop-up message if there are any issues. You will be able to modify the submitted information to correct any noted issues. When complete, the *View Uploads* page displays.



Repeat steps 4-9 for each document you need to upload.

10. Click the **General** tab.
11. Verify the documents were uploaded and provide any additional details regarding the documentation.

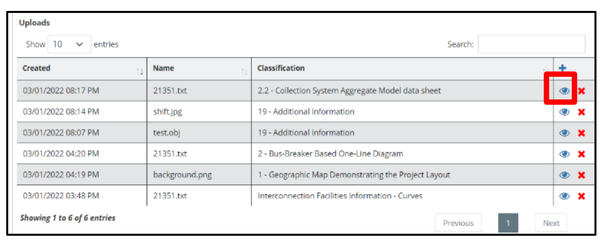


Viewing an Upload

You can view an upload on the *Uploads* tab. Customers cannot delete an upload. If you want an upload deleted, you will need to contact ISO New England. You can upload a similar file type by using a different name.

To view an upload:

1. Click **View** . The upload opens.

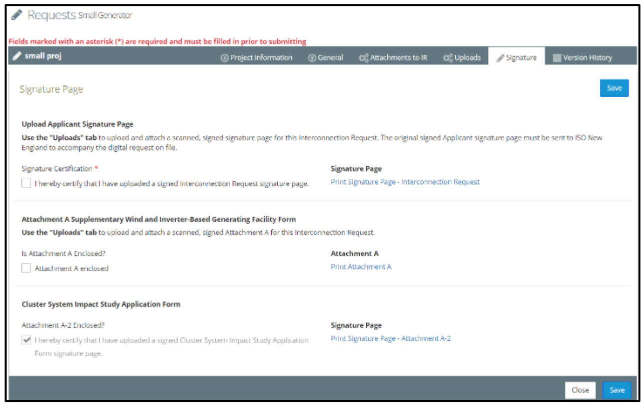


Signature Tab

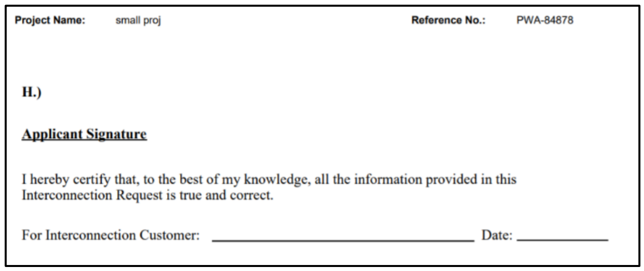
For additional information see *Original Document with Wet Signatures* in the Help Portal.

To use the Signature tab:

1. Click the **Signature** tab. There is a print signature link for each type of attachment.
2. Click **Print Signature Page – Interconnection Request**. The signature page opens in a new browser tab.



3. Download the page, print, sign, and scan it.



Project Name: small proj **Reference No.:** PWA-84878

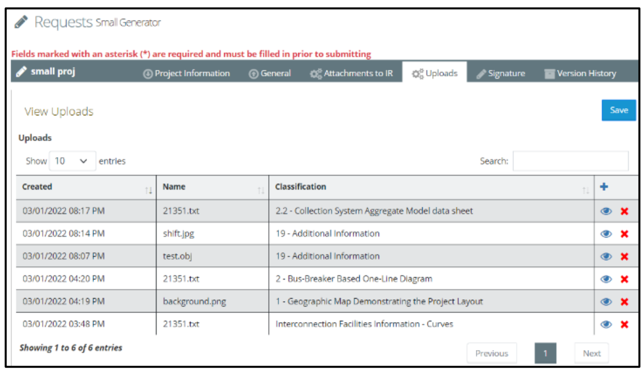
H.)

Applicant Signature

I hereby certify that, to the best of my knowledge, all the information provided in this Interconnection Request is true and correct.

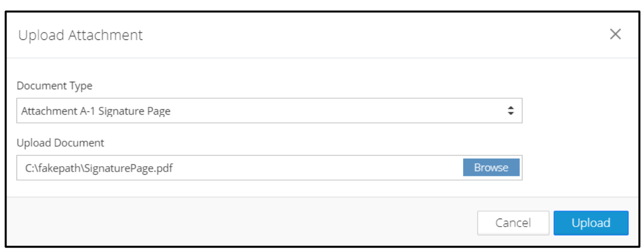
For Interconnection Customer: ______________________ Date: __________

4. Click the **Uploads** tab.
5. Click the **Add** button ✚. The *Upload Attachment* dialog box opens.

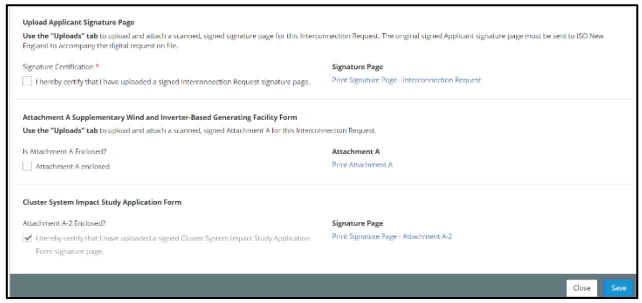


6. Select **Application Signature Page** from the **Document Type** drop-down list.
7. Click **Browse** to navigate to the file you signed and scanned to upload.
8. Click **Upload** to add the file. IRTT validates the submission and notifies you via pop-up message if there are any issues. You will be able to modify the submitted information to correct any noted issues. When complete, the *View Uploads* page displays.

   Repeat steps 5-9 for each attachment type you need for the interconnection request.



9. Click the **Signature** tab.
10. Select the checkboxes to confirm documents were uploaded.
11. Click **Save**.

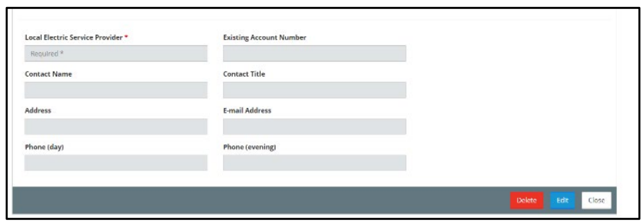


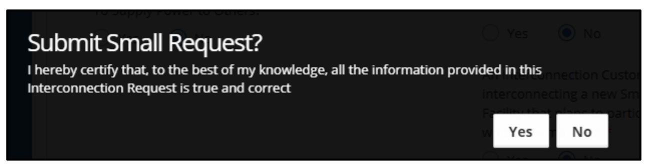
Submitting the Request

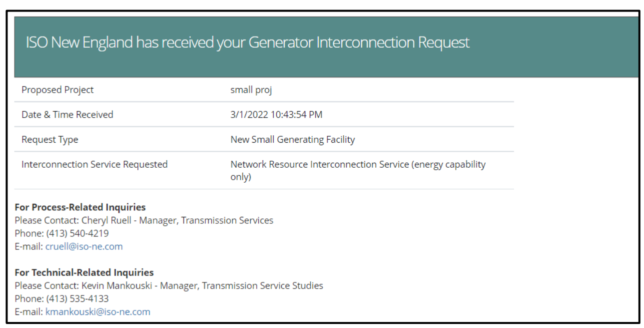
When you finish filling out the Project Information, Attachments to IR, General, and Signature tabs, you can submit the request. For more information, see the *Interconnection Request submittal verification* in the Help Portal.

To submit the request:

1. Click the **Project Information** tab and click **Submit**. IRTT validates all of the submissions and notifies you via pop-up message if there any issues. You will be able to modify the submitted information to correct any noted issues.
2. Click **Yes** to confirm the interconnection request. The interconnection request is submitted and a confirmation page displays.

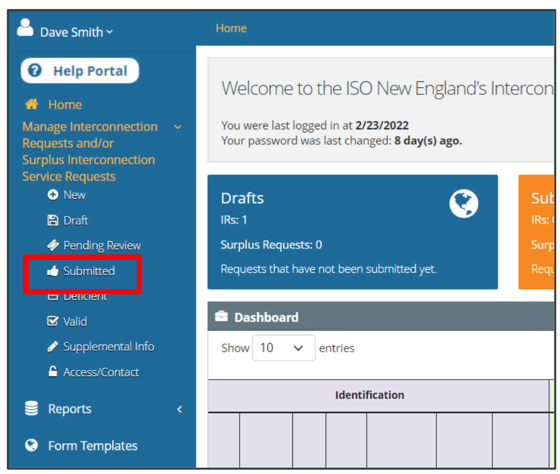






IRTT notifies the [primary representative](#) via email that the interconnection request was submitted.

You can view this request by clicking **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Submitted**.



Submitting an Elective Transmission Upgrade (ETU) Interconnection Request

A new Elective Transmission Upgrade request can be submitted by company admins or request managers. Once you create a request, there are four tabs that you need to complete in order to submit the request:

- Project Information: Basic information regarding the request
- Attachments to IR: Technical data supported by studies and their attachments
- Uploads: Repository for required documentation.
- Signature: The final signatures for the request.

The **Version History** tab provides an ongoing record of the changes made to the request.

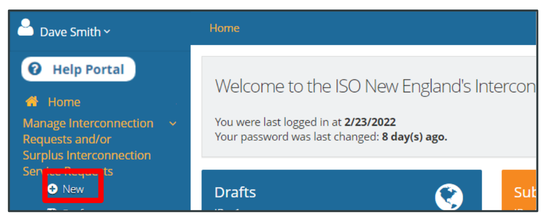
During the creation of an ETU request, you can click the **Save** button to save your work to finish at a later time. Click the **Close** button to close the request and return to the *Drafts IR* page. Make sure you save your work before you close the request. You can return to work on the request draft by clicking **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Draft** in the navigation menu.

For additional information regarding the selective transmission upgrade request, see Schedule 25 Elective Transmission Upgrade Interconnection Procedures.

Project Information Tab

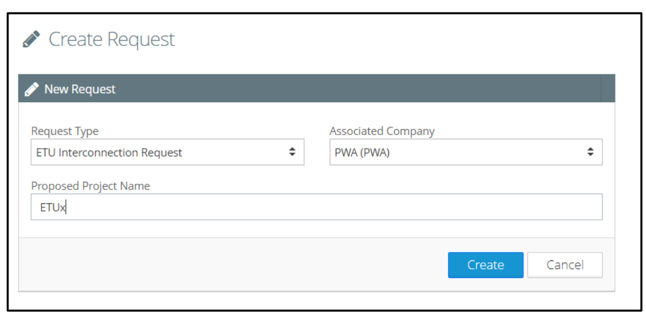
To submit an elective transmission upgrade request:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > New** from the navigation menu. The *Create Request* page opens.

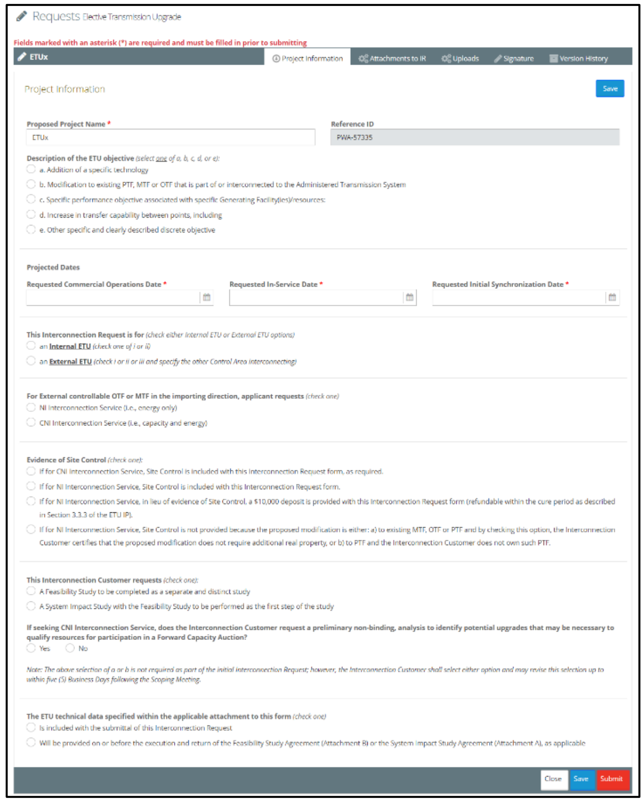


2. Select **ETU Interconnection Request** from the *Request Type* drop-down list.
3. Select the **company** from the *Associated Company* drop-down list.

   If you do not see your company on the list, check with your company admin to make sure your account is set up and appropriate user role is assigned to you before continuing.
4. Type a **name** in the *Proposed Project Name* text box (required).
5. Click **Create**. A draft for the ETU interconnection request is created with a unique reference ID. The *Requests Elective Transmission Upgrade* page opens.



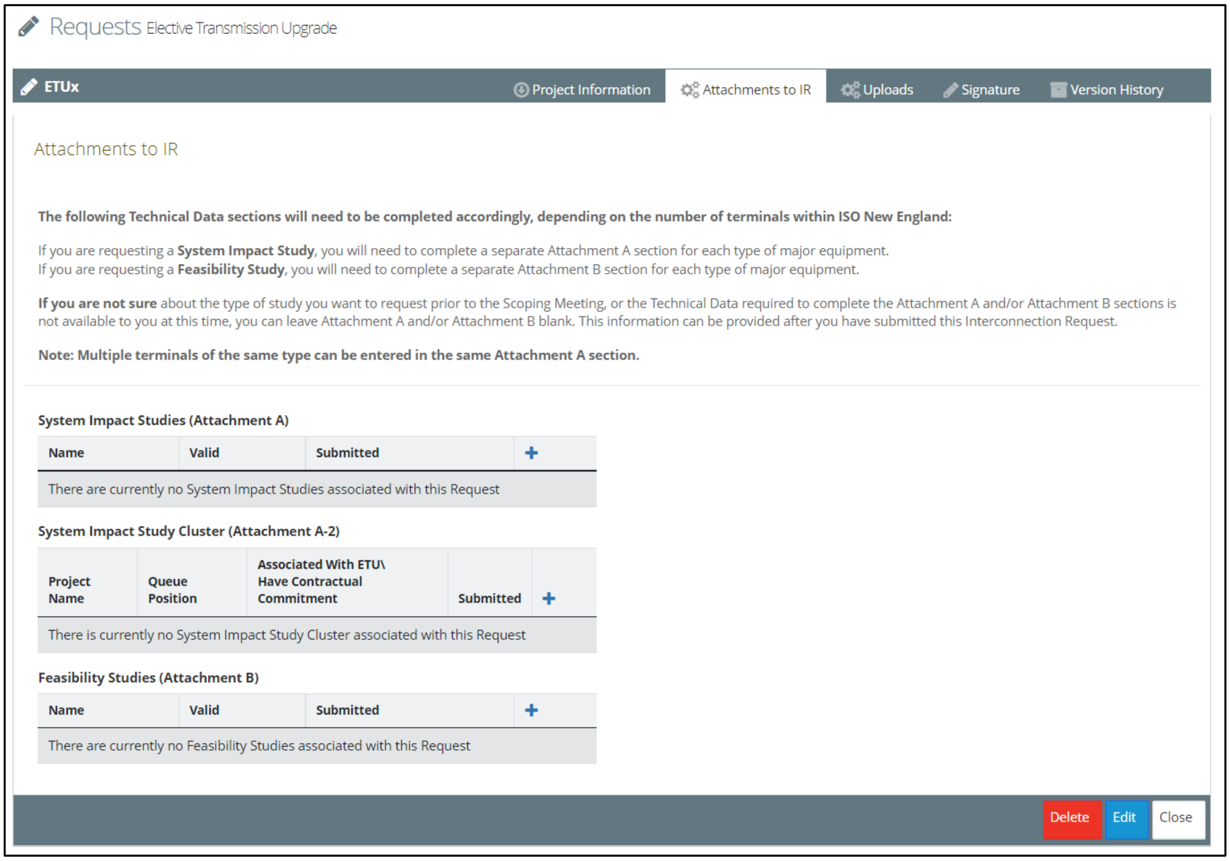
6. Complete the questions and fields on the form. Those with an asterisk are mandatory.



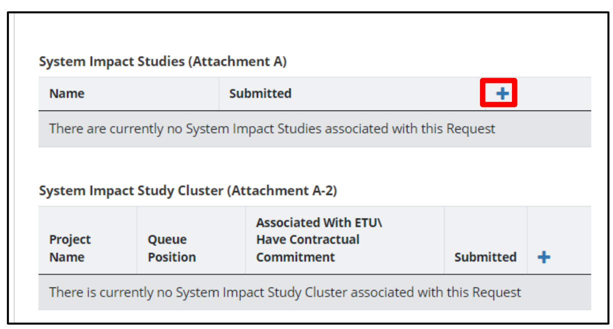
Attachments to IR Tab

To use the Attachments to IR tab:

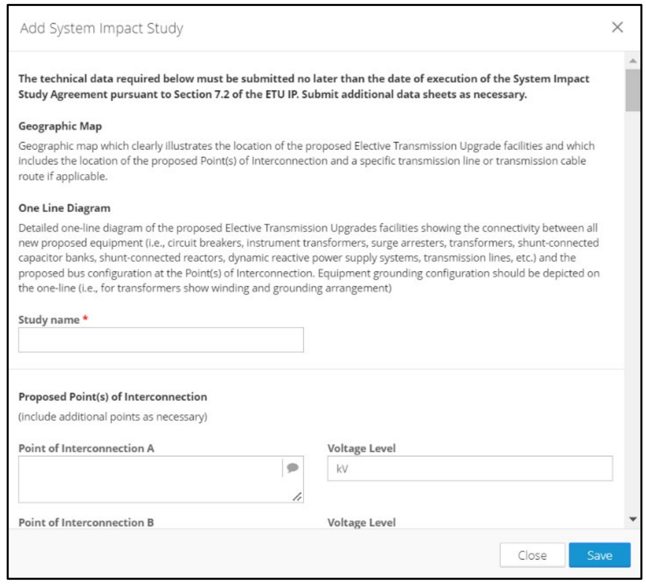
1. Click the **Attachments to IR** tab. The type and number of attachments you need to complete on this tab varies depending on the number of generators required.



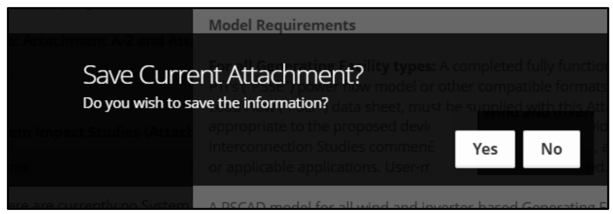
2. Click the **Add** + button for each of the attachments you need to add. The dialog box opens.



3. Provide the necessary information. Fields with an asterisk are required.
4. Click **Save**.



5. Click **Yes** to confirm the attachment.
6. Repeat steps 2-5 for each attachment.

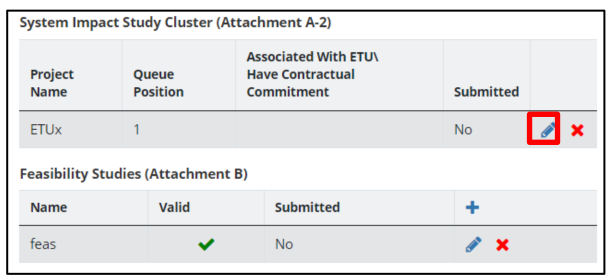


Editing or Deleting Attachment Record

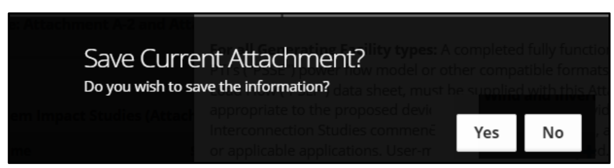
You can edit or delete an attachment that was previously added to the request.

To edit an attachment record:

1. Click **Edit** . The attachment opens.
2. Make the changes you want and click **Save**.

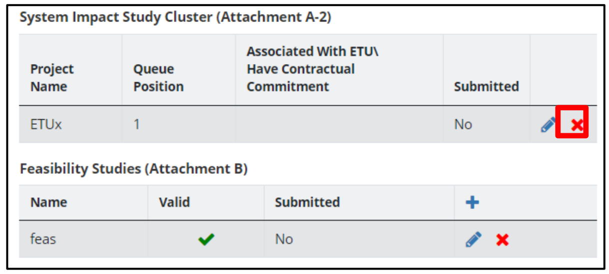


3. Click **Yes** to confirm the attachment edits. The *Attachments to IR* tab reopens.

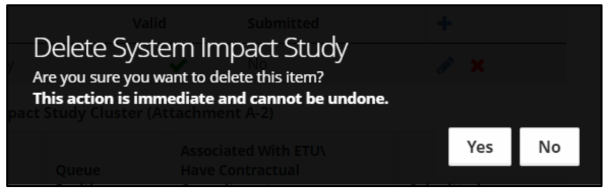


To delete an attachment record:

1. Click **Delete** .



2. Click **Yes** to confirm the delete. The *Attachments to IR* tab reopens.

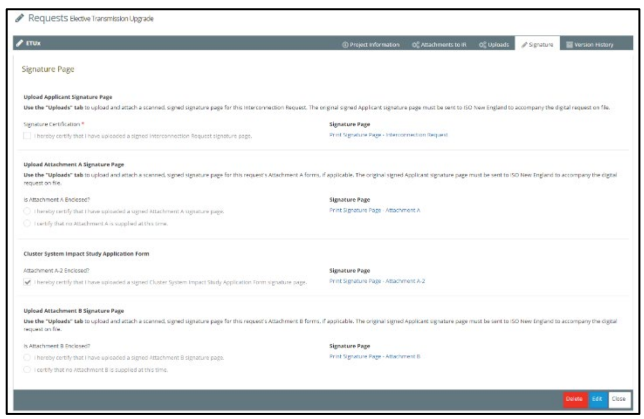


Uploads and Signature Tabs

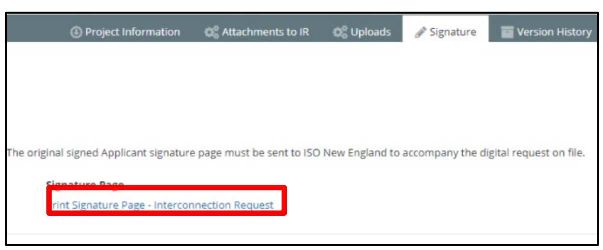
For additional information, see *Original Document with Wet Signatures* in the Help Portal.

To use the Uploads and Signature tabs:

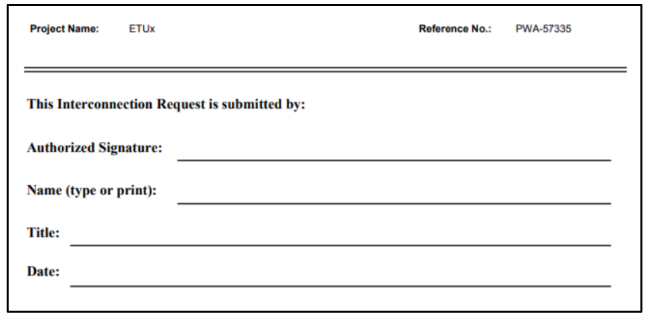
1. Click the **Signature** tab.



2. Click **Print Signature Page – Interconnection Request**. The signature page opens in a new browser tab.



3. Download the page, print, sign, and scan it.



Project Name: ETUx **Reference No.:** PWA-57335

This Interconnection Request is submitted by:

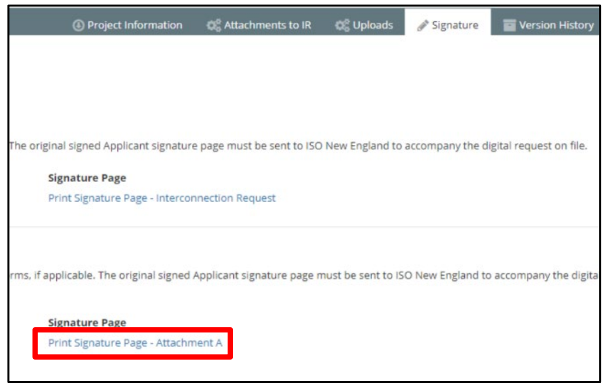
Authorized Signature: ______________________________

Name (type or print): ______________________________

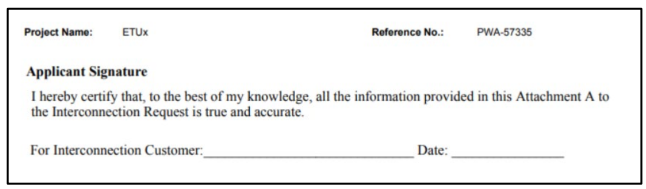
Title: ______________________________

Date: ______________________________

4. Click **Print Signature Page – Attachment A**. The signature page opens in a new browser tab.



5. Download the page, print, sign, and scan it.



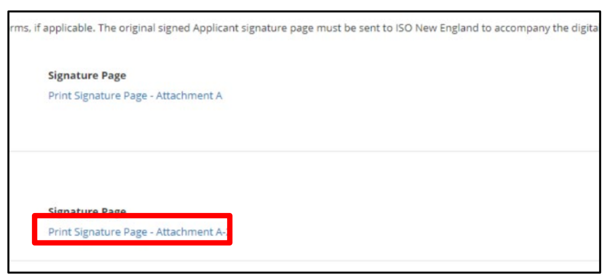
Project Name: ETUx **Reference No.:** PWA-57335

Applicant Signature

I hereby certify that, to the best of my knowledge, all the information provided in this Attachment A to the Interconnection Request is true and accurate.

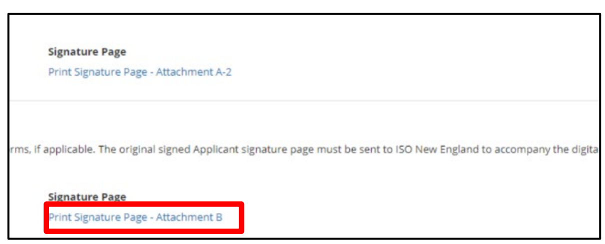
For Interconnection Customer:____________________________ Date: ______________

6. Click **Print Signature Page – Attachment A-2**. The signature page opens in a new browser tab.

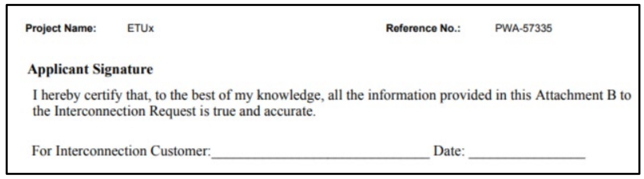


7. Download the page, print, sign, and scan it.

8. Click **Print Signature Page – Attachment B**. The signature page opens in a new browser tab.



9. Download the page, print, sign, and scan it.

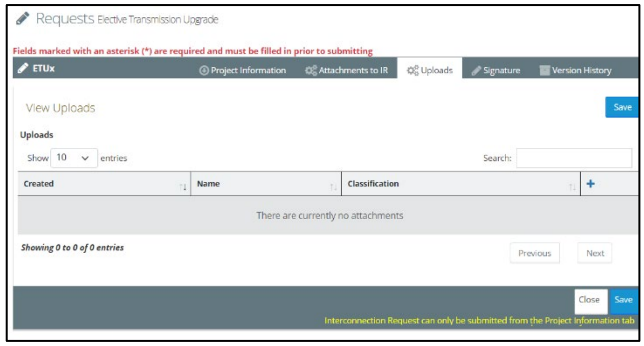

Project Name: ETUx **Reference No.:** PWA-57335

Applicant Signature

I hereby certify that, to the best of my knowledge, all the information provided in this Attachment B to the Interconnection Request is true and accurate.

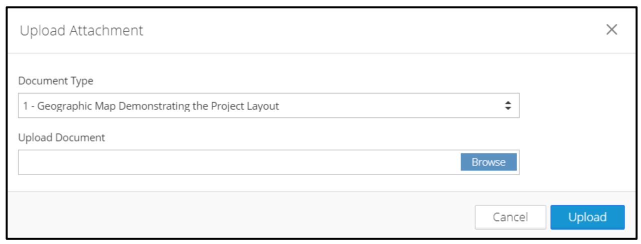
For Interconnection Customer:__________________________ Date: _______________

10. Click the **Upload** tab.
11. Click the **Add** button. The *Upload Attachment* dialog box opens.

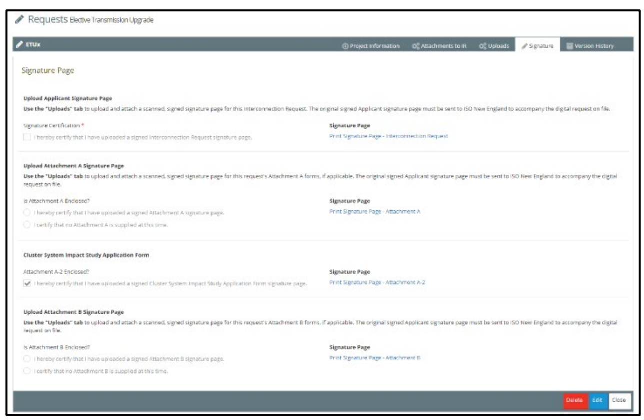


12. Select the **Document Type** from the drop-down list.
13. Click **Browse** to navigate to the print signature file that you want to upload.
14. Click **Upload** to add the file. IRTT validates the submission and notifies you via pop-up when there is an issue. You will be able to modify the submitted information to correct any noted issues. When complete, the *View Uploads* page displays.

    Repeat steps 11-14 for each document you need to upload.



15. Click the **Signature** tab again. Confirm that the necessary documentation has been uploaded.
16. Click **Save**.

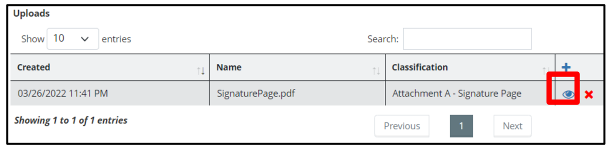


Viewing an Upload

You can view an upload on the *Uploads* tab. Customers cannot delete an upload. If you want an upload deleted, you will need to contact ISO New England. You can upload a similar file type by using a different name.

To view an upload:

1. Click **View** . The upload opens.

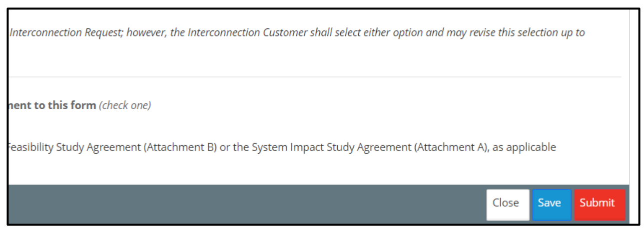


Submitting the Request

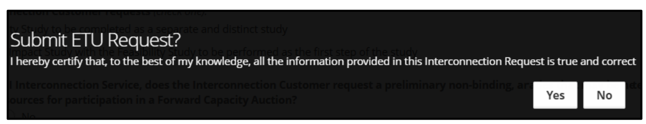
When you finish filling out the Project Information, Attachments to IR, and Signature tabs, you can submit the request.

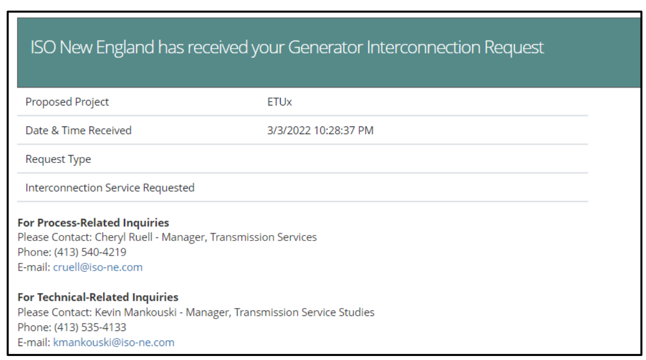
To submit the request:

1. Click the **Project Information** tab.
2. Click **Submit**.



3. Click **Yes** to confirm the ETU request. The ETU request is submitted and a confirmation page displays.

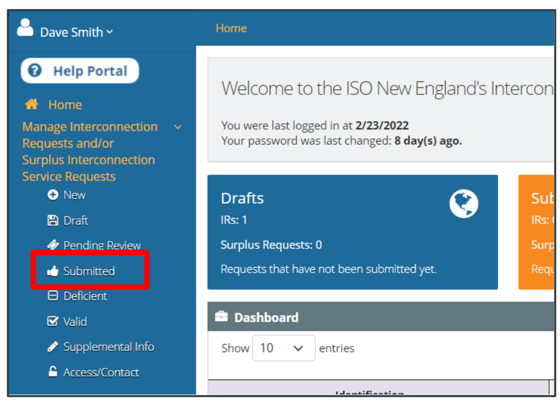




4. IRTT notifies the [primary representative](#) via email that the interconnection request was submitted.

   For more information on this topic, see *Interconnection Request submittal verification* in the Help Portal.

You can view this request by clicking **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Submitted**.

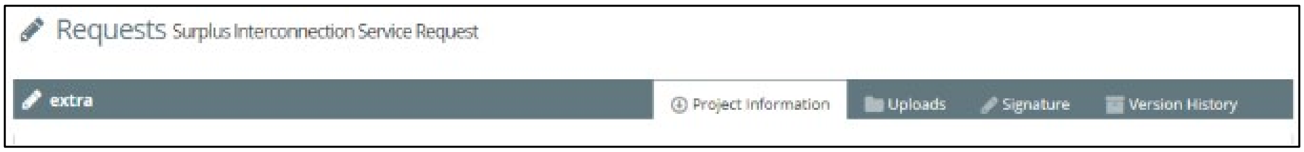


Submitting a Surplus Interconnection Service Request

A surplus service request can be submitted by company admins or request managers. Once you create a request, there are three tabs that you need to complete in order to submit the request:

- Project Information: Basic information regarding the request.
- Uploads: Repository for required documentation.
- Signature: The final signatures for the request.

The **Version History** tab provides an ongoing record of the changes made to the request.



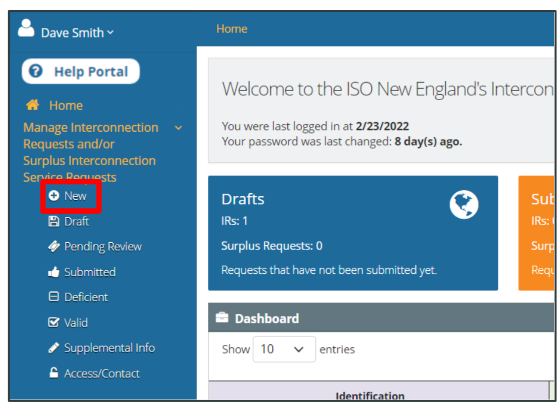
During the creation of a surplus service request, you can click the **Save** button to save your work to finish at a later time. Click the **Close** button to close the request and return to the *Drafts IR* page. Make sure you save your work before you close the request. You can return to work on the request draft by clicking **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Draft** in the navigation menu.

For additional information regarding the surplus service request, see 3.3 of sch_22_lgip.pdf (iso-ne.com).

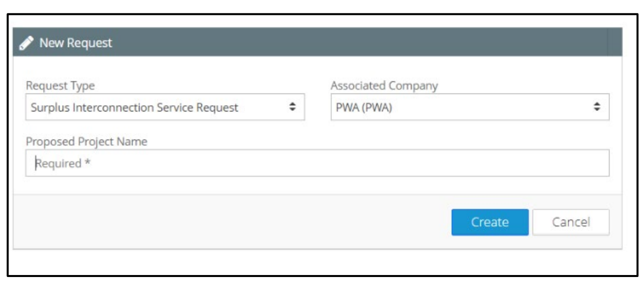
Project Information Tab

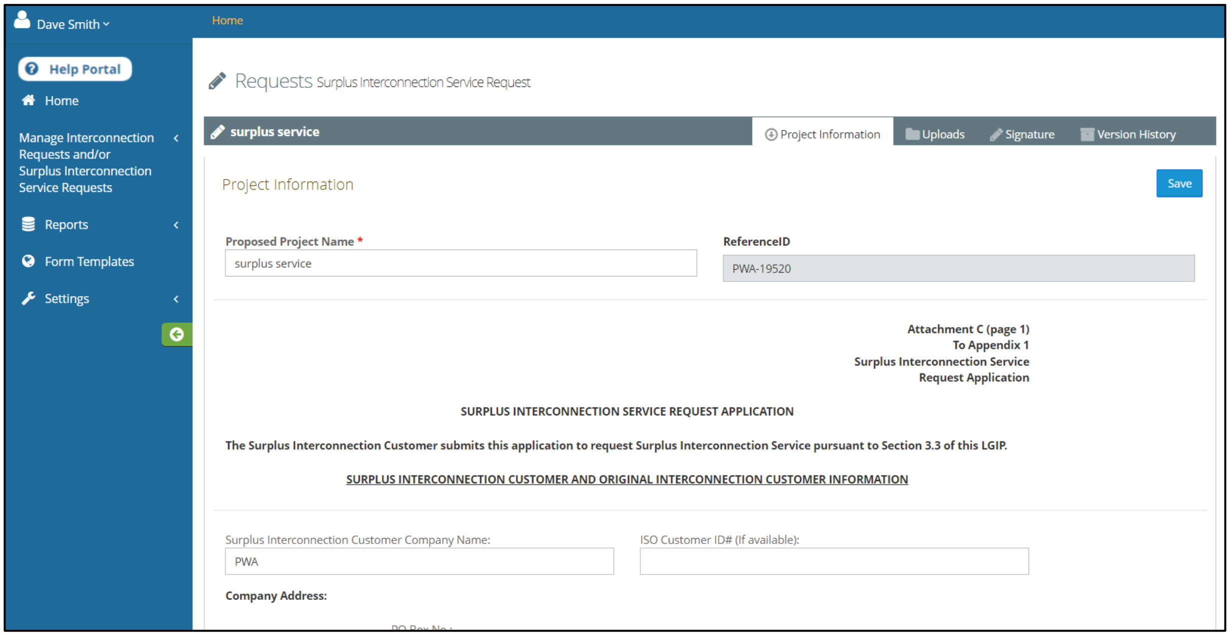
To submit a surplus service request:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > New** from the navigation menu. The *Create Request* page opens.

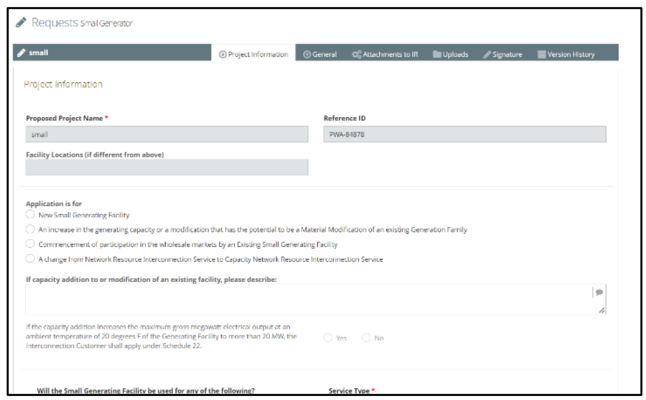


2. Select **Surplus Interconnection Service Request** from the *Request Type* drop-down list.
3. Select the **company** from the *Associated Company* drop-down list.
4. Type a **name** in the *Proposed Project Name* text box (required).
5. Click **Create**. A draft for the surplus interconnection service request is created. The *Surplus Interconnection Service Request* page opens.





6. Complete the questions and fields on the form. Those with an asterisk are mandatory. The site maps and site control evidence sections require file uploads.

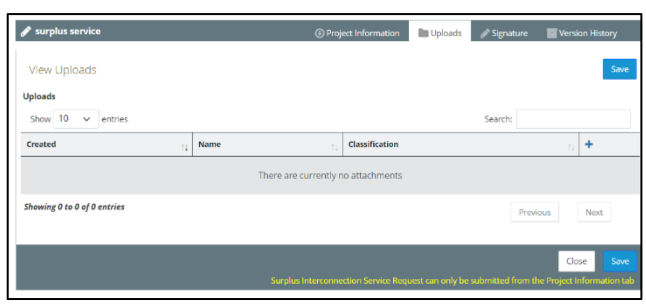


Uploads Tab

You can view an upload on the *Uploads* tab. Customers cannot delete an upload. If you want an upload deleted, you will need to contact ISO New England. You can upload a similar file type by using a different name.

To use the Uploads tab:

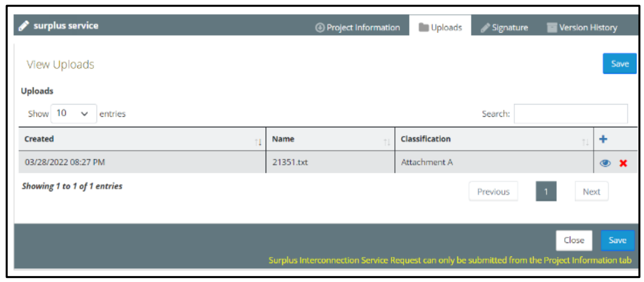
1. Click the **Uploads** tab.
2. Click the **Add** button ➕. The *Upload Attachment* dialog box opens.



3. Select the **Document Type** from the drop-down list.
4. Click **Browse** to navigate to the file you want to upload.
5. Click **Upload** to add the file. IRTT validates the submission and notifies via pop-up message if you have any issues. You will be able to modify the submitted information to correct any noted issues. When complete, the *View Uploads* page displays.

   Repeat steps 2-5 for each document you need to upload.

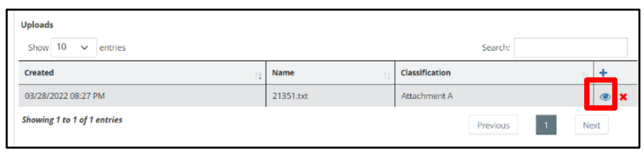
6. Click **Save**.



Viewing an Upload

To view an upload:

1. Click **View** . The upload opens.

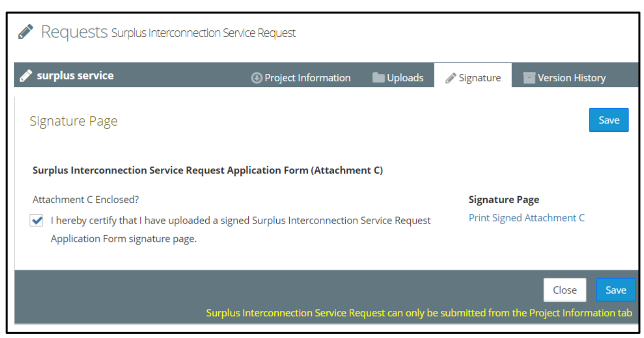


Signature Tab

For additional information, see *Original Document with Wet Signatures* in the Help Portal.

To use the Signature tab:

1. Click the **Signature** tab. Select the **Attachment C Enclosed?** checkbox.
2. Click **Save**.

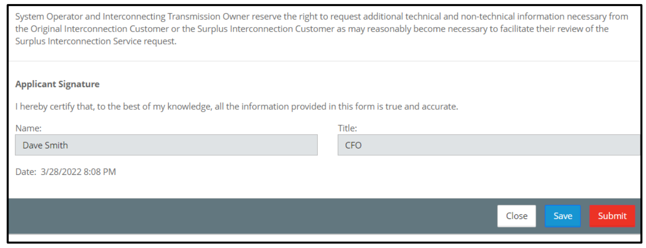


Submitting the Request

When you finish filling out the Project Information and Signature tabs, you can submit the request.

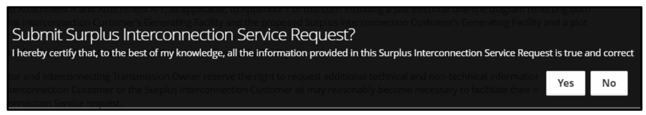
To submit the request:

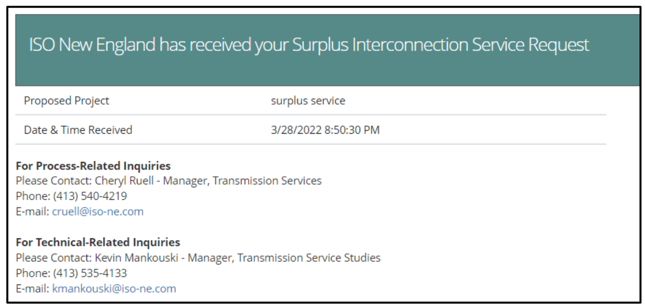
1. Click the **Project Information** tab and click **Submit**.



2. Click **Yes** to confirm the interconnection request.

   The interconnection request is submitted and a confirmation page displays.

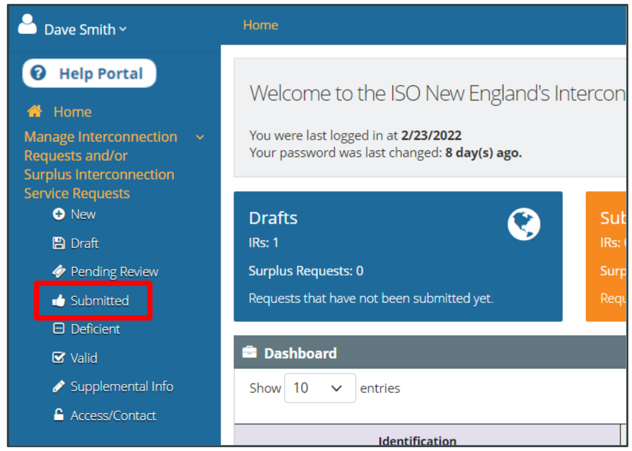




   IRTT notifies the [primary representative](#) via email that the interconnection request was submitted.

   For more information see *Interconnection Request submittal verification* in the Help Portal.

You can view this request by clicking **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Submitted**.



Editing or Curing Interconnection Requests

The status of an interconnection request during its lifecycle determines what you can edit. Prior to submission, a request remains in *draft* status and you can make any changes to the draft that you want. Once you submit a request, it is *locked* and there are limits the type of changes you can make to a locked request.

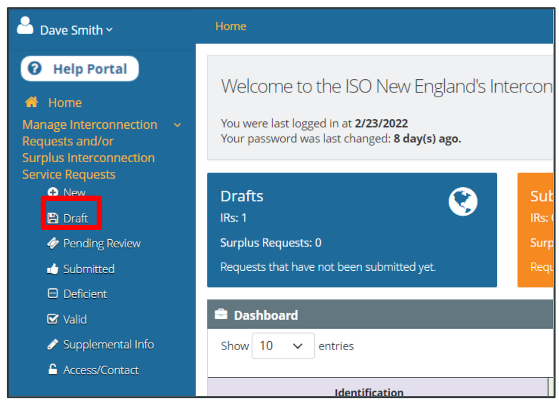
Modifying a Draft Interconnection Request

Company admins or request managers can modify interconnection requests that are still drafts. If a request has already been submitted, and you want to provide additional information, you need to follow a different process. See Modifying a Locked Interconnection Request for instructions on providing additional information to a submitted request.

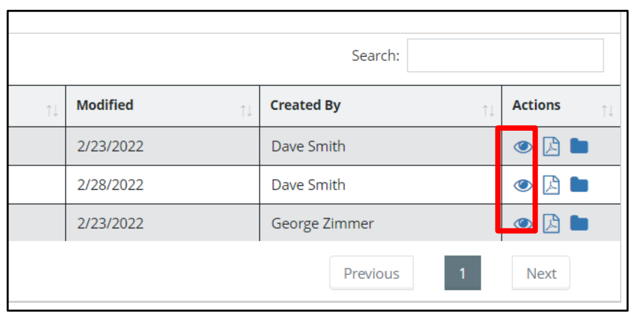
To modify a draft interconnection request:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Draft** from the navigation menu. The *Manage Requests Draft IRs and Surplus Interconnection Service Requests* page opens.

   If desired, use the **Select Company to Manage** or the **Select Generator Type** drop-down lists to filter the drafts.



2. Click **View request and manage attachments** for the draft you want to edit. Depending on the selection you made, one of the following opens:
   - Large Generator Request page
   - Small Generator Request page
   - Elective Transmission Upgrade Request page
   - Surplus Interconnection Service Request page



3. Click **Edit** and modify the request as needed. For details on each request, see:
   - Submitting a Large Generator Request
   - Submitting a Small Generator Request
   - Submitting an Elective Transmission Upgrade (ETU) Interconnection Request
   - Submitting a Surplus Interconnection Service Request

Modifying a Locked Interconnection Request

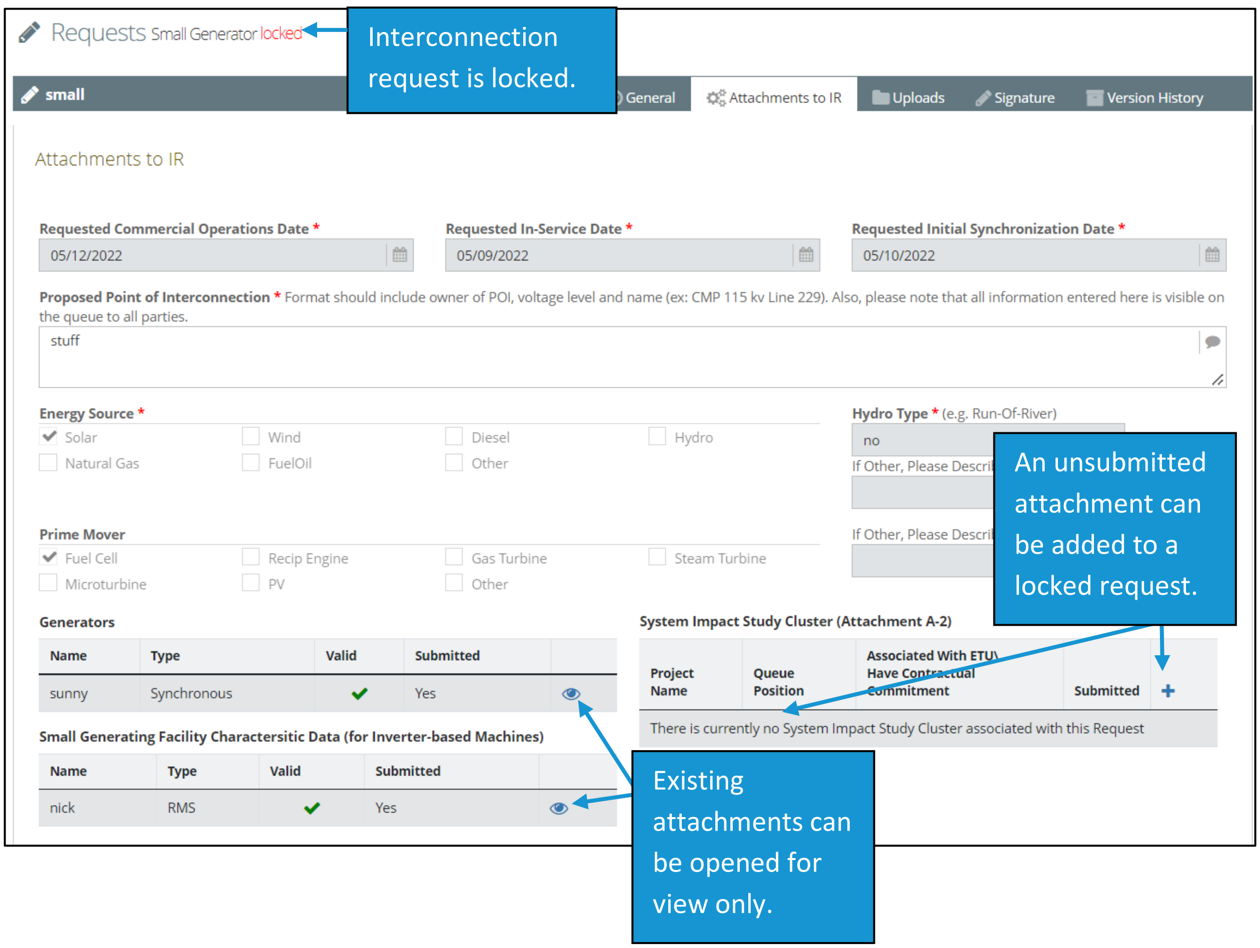
Locked requests limit the type of changes that are available to you. You can add attachments and uploads, but if you need to change project information there are guidelines you need to follow.

The following processes are for requests that have already been submitted. If you need to make changes to a request that has not been submitted and is still in draft status, see Modifying a Draft Interconnection Request.

For more information, see *Submitting files once Interconnection Request* in the Help Portal.

Attachments and Locked Requests

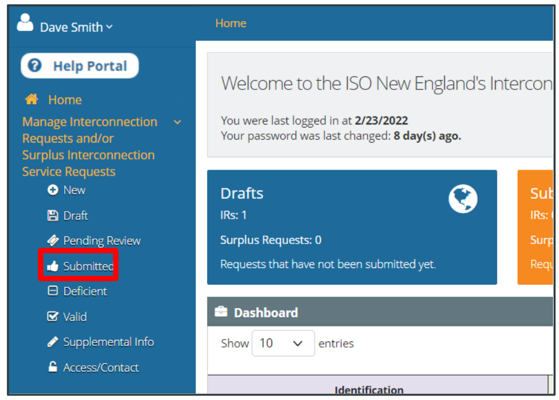
For a locked request, you can view an attachment but you cannot change it. You can, however, add an attachment that was not previously submitted.



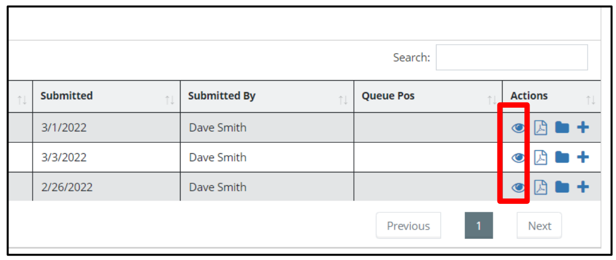
Attachments can be submitted by company admins or request managers.

To add an attachment to a locked interconnection request:

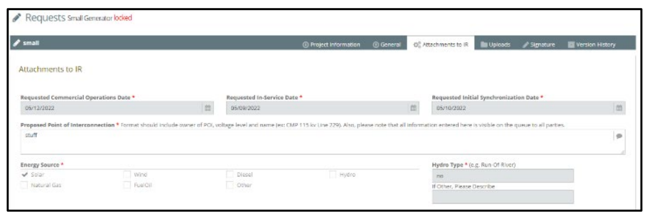
1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Submitted** from the navigation menu. The *Submitted IRs and Surplus Interconnection Service Requests* page opens.



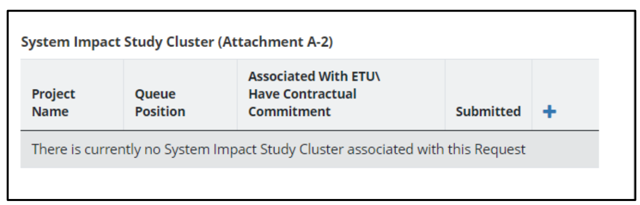
2. Click **View request and manage attachments** for the request that you want to view. The request opens.



3. Click the **Attachments to IR** tab.

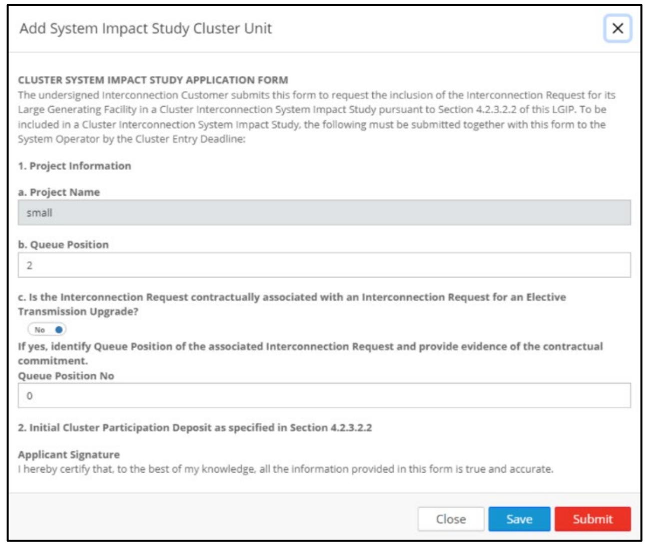


4. Click **Add** for the type of attachment you want to add. The attachment dialog box opens.

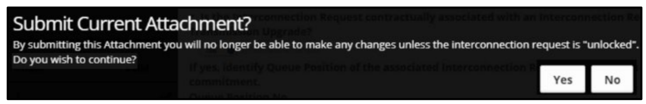


5. Provide the necessary information. Fields with an asterisk are required.
6. Click **Submit**.

   Note: The actual attachment type will vary depending on your selection and the interconnection request you are submitting.



7. Click **Yes** to confirm the attachment.



Submitting Supplemental Information

Supplemental information can be submitted by company admins or request managers.

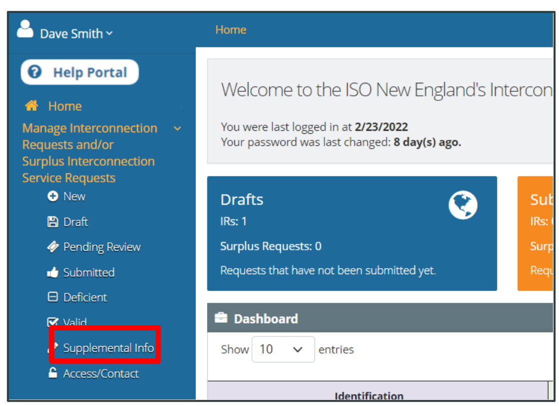
Uploads and Locked Requests

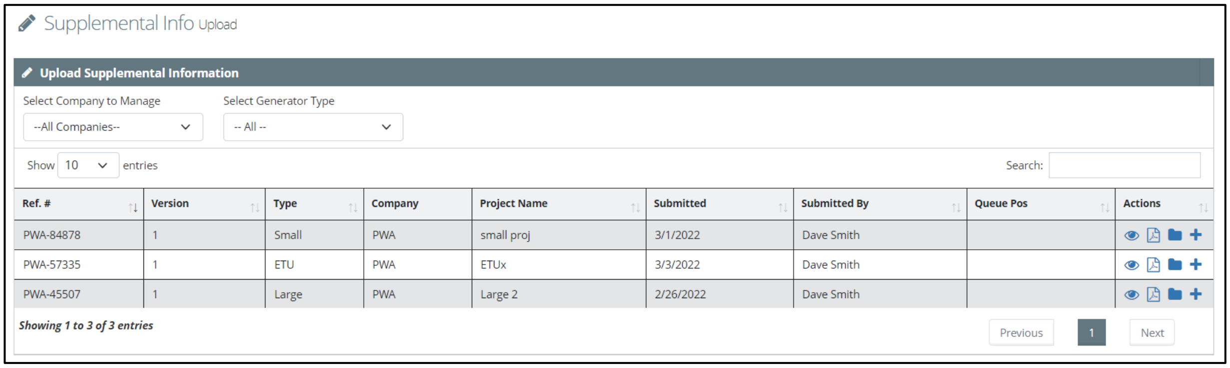
For a locked request, you cannot delete an existing upload but you can add a new one using the *Supplemental Info* page.

To add supplemental information:

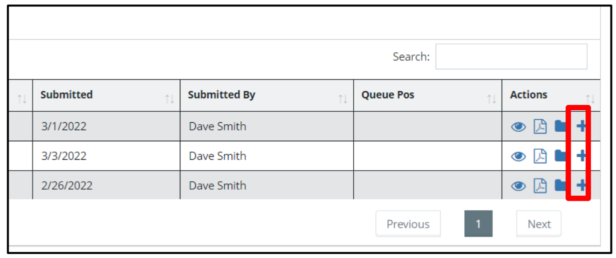
1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Supplemental Info** from the navigation menu. The *Supplemental Info Upload* page opens.

   If desired, use the **Select Company to Manage** or the **Select Generator Type** drop-down lists to filter the entries.





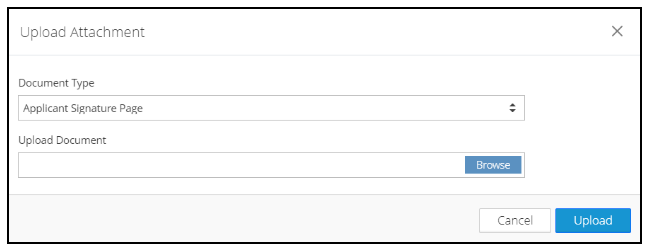
2. Click **Upload Document** for the request that you want to supplement with additional information. The *Upload Attac hment* dialog box opens.



3. Select the **Document Type** from the drop-down list.
4. Click **Browse** to navigate to the file you want to upload.
5. Click **Upload** to add the file.

   IRTT validates the submission and notifies you via pop-up message if there are any issues. You will be able to modify the submitted information to correct any noted issues. When complete, the *Upload Supplemental Information* page displays.

   Repeat steps 2-5 for each document you need to upload.

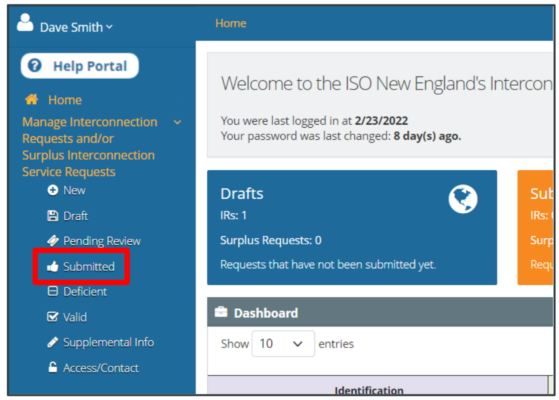


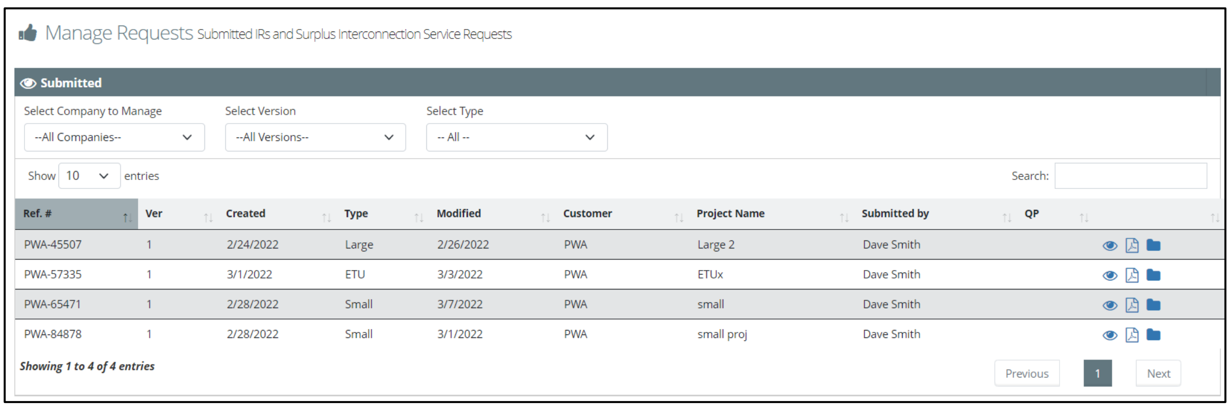
Changing Project Information for an Interconnection Request

When you want to make changes to project information for a request that you previously submitted, you need to upload an updated request. The updated request will then be reviewed by ISO-NE to determine if the changes can be allowed.

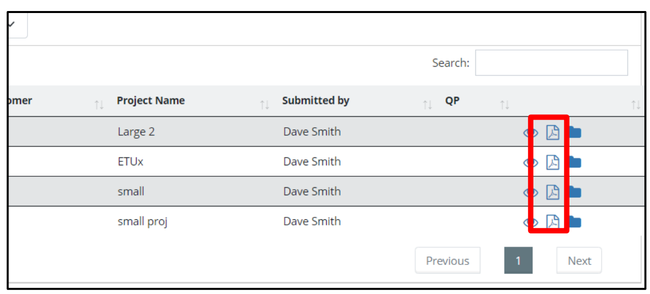
To make changes to project information of an interconnection request:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Submitted**



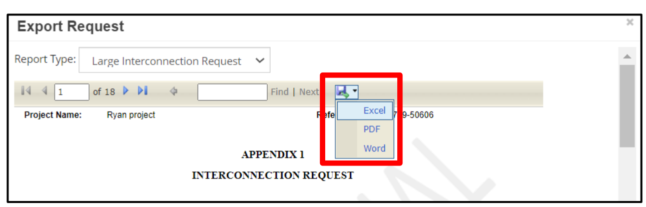


2. Click **Export request and attachments as PDF** for the request you want to export. The *Export Request* dialog box opens.



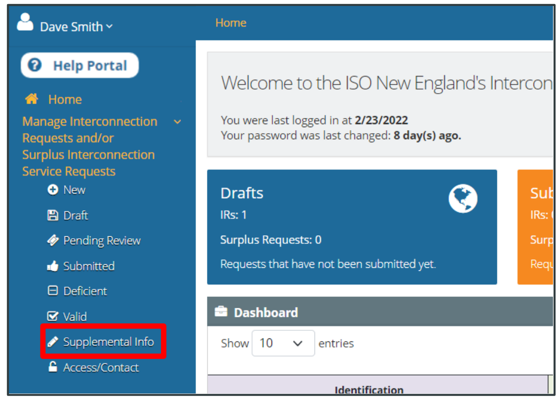
3. Click the **Export drop down menu**. Select a format.

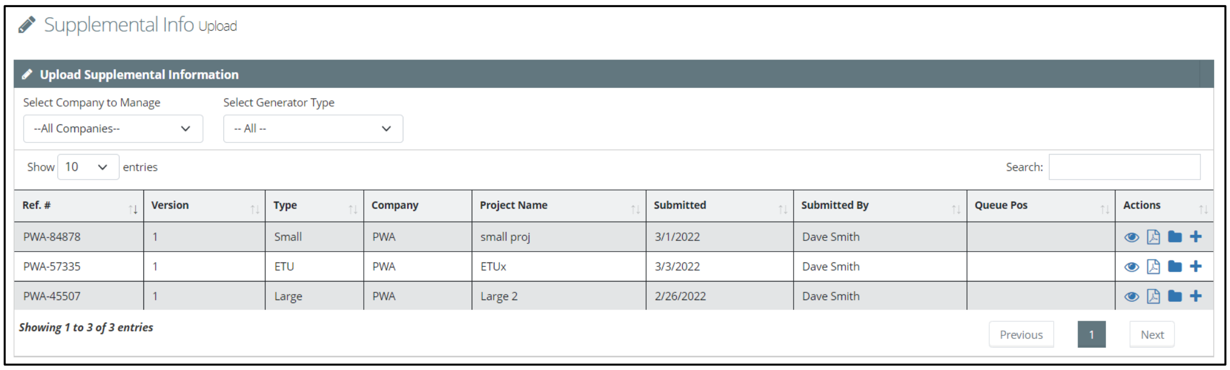
   The request is created and downloaded.



4. Make redline changes to the project information you want to update.

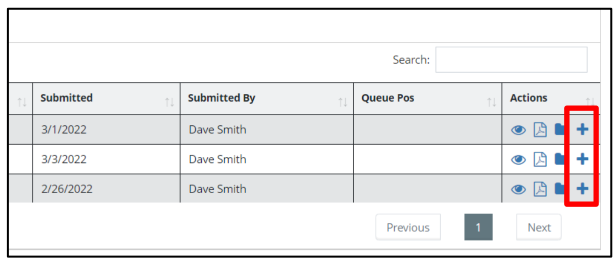
5. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Supplemental Info** from the navigation menu. The *Supplemental Info Upload* page opens.





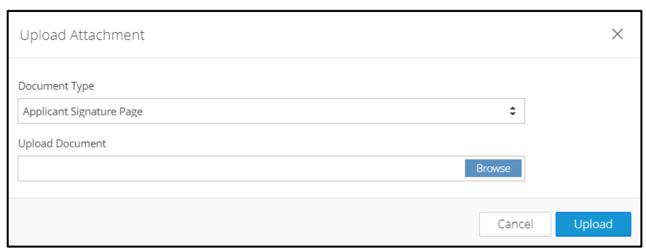
Ref. #	Version	Type	Company	Project Name	Submitted	Submitted By	Queue Pos	Actions
PWA-84878	1	Small	PWA	small proj	3/1/2022	Dave Smith		
PWA-57335	1	ETU	PWA	ETUx	3/3/2022	Dave Smith		
PWA-45507	1	Large	PWA	Large 2	2/26/2022	Dave Smith		

6. Click **Upload Document** ✚ for the request that you want to upload changes for. The *Upload Attachment* dialog box opens.



7. Select the **Project Information** from the **Document Type** from the drop-down list.
8. Click **Browse** to navigate to the file you want to upload.
9. Click **Upload** to add the file.

   IRTT validates the submission and notifies you via pop-up message if there are any issues. You will be able to modify the submitted information to correct any noted issues. When complete, the *Upload Supplemental Information* page displays.

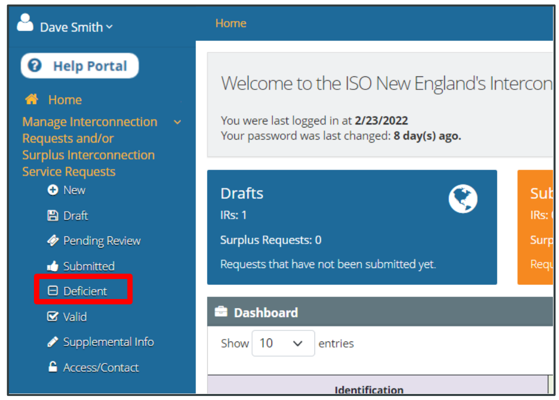


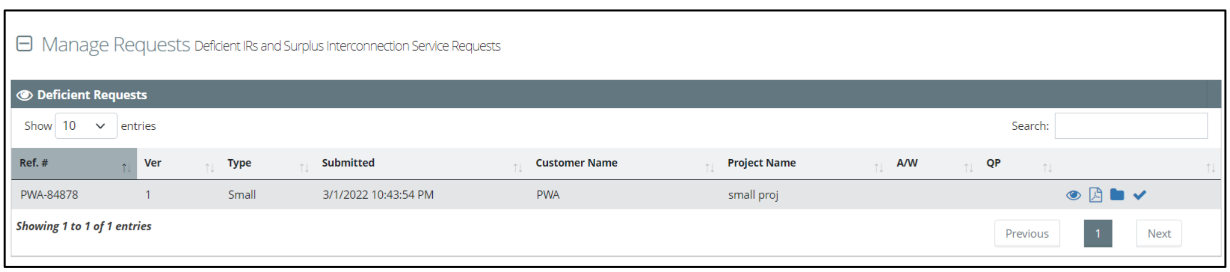
Curing a Deficient Interconnection Request

Company admins and request managers can cure deficient interconnection requests. When a request is deficient, IRTT sends an email with any time limits to the assignee for that request.

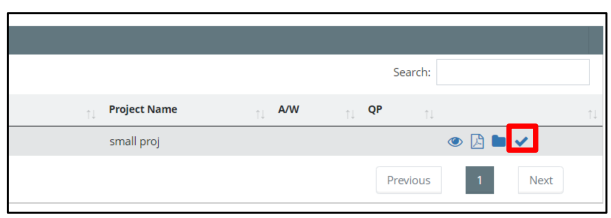
To cure a deficient request:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests > Deficient** from the navigation menu. You can also click the **Deficient** tile. The *Deficient IRs and Surplus Interconnection Service Requests* page opens.

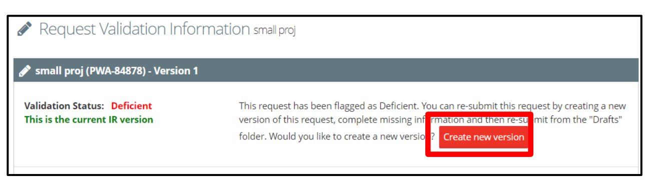




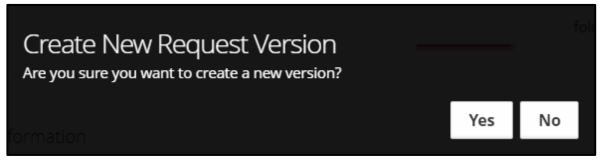
2. Click **View Validation** ✔ for the deficient request you want to cure. The *Request Validation Information* page opens.



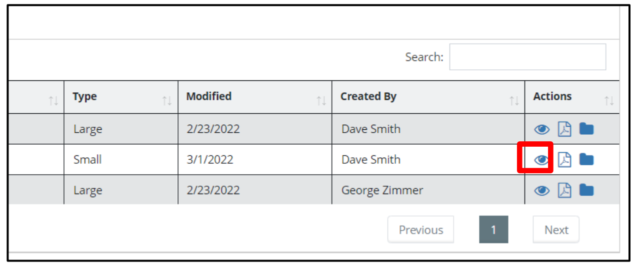
3. Click **Create new version**.



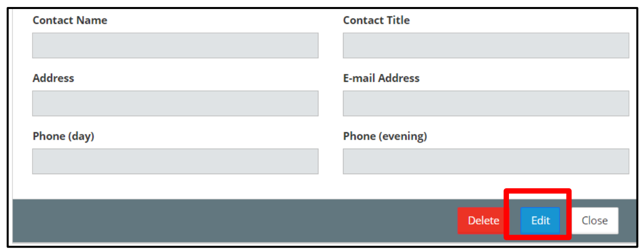
4. Click **Yes** to confirm the new request version. The *Manage Requests Draft IRs and Surplus Interconnection Service Requests* page opens with a new version of the request you just created.



5. Click **View request and manage attachments**  for the request you want to cure. Depending on the selection you made, one of the following opens:
    - Large Generator Request page
    - Small Generator Request page
    - Elective Transmission Upgrade Request page
    - Surplus Interconnection Service Request



6. Click **Edit** to modify the request and resubmit it. For details on each interconnection request type, see:
    - [Submitting a Large Generator Request]
    - [Submitting a Small Generator Request]
    - [Submitting an Elective Transmission Upgrade (ETU) Interconnection Request]
    - [Submitting a Surplus Interconnection Service Request]



Viewing Interconnection Requests

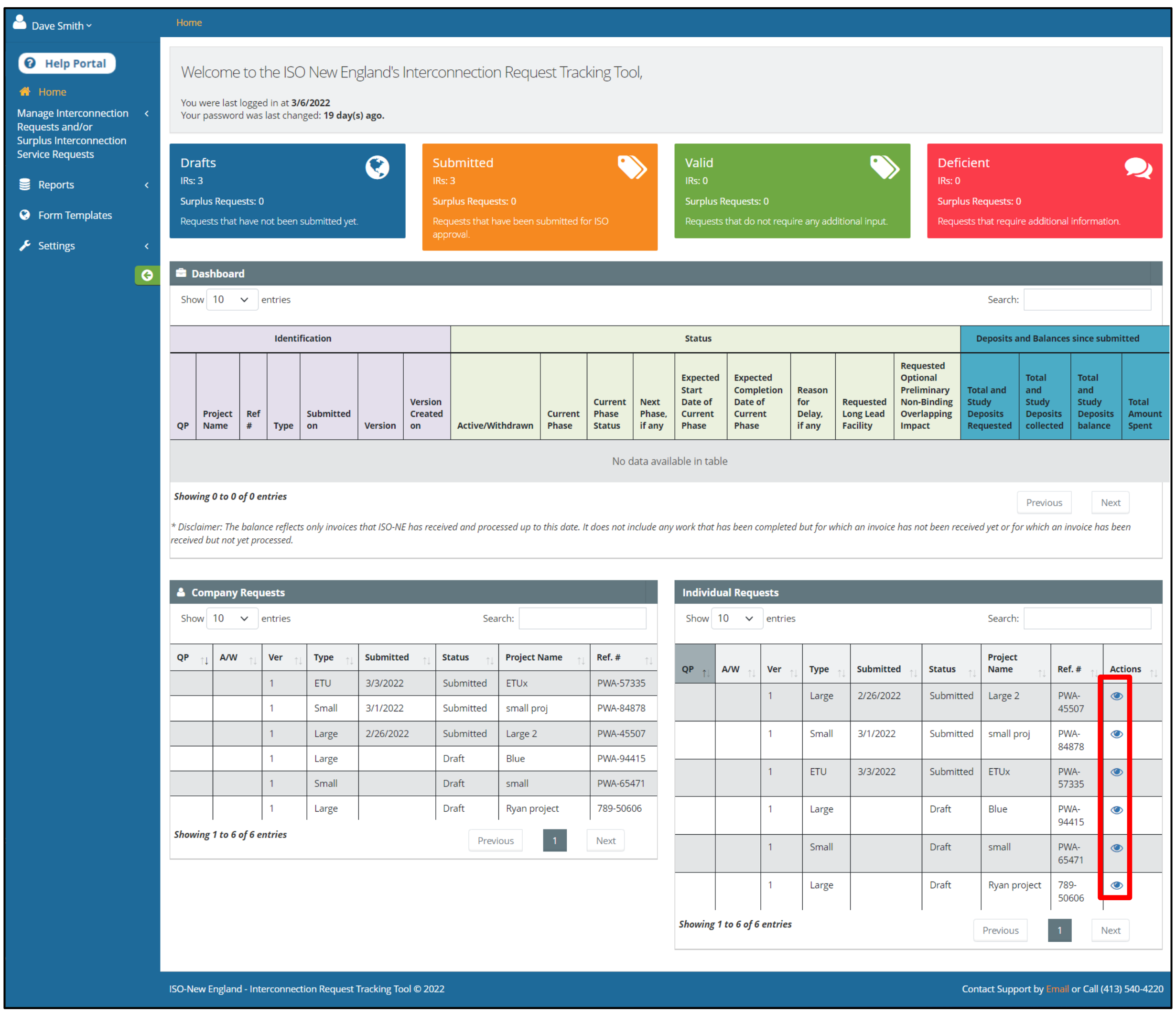
There are several statuses (Draft, Pending Review, Submitted, Deficient, and Valid) that an interconnection request can move through on its way to approval. You can view a list of requests on the *Home* page or view request summaries for each status.

Viewing an Interconnection Request

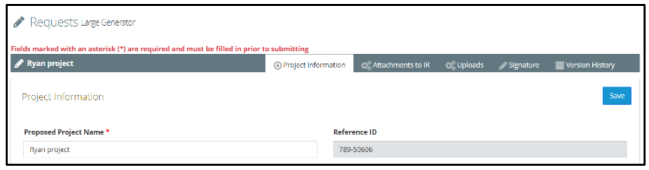
An interconnection request can be viewed by company admins, request managers, and request viewers. If you cannot find a request, you may not have access to it. If you need access to an interconnection request, contact the company admin for your company. Use the *Individual Requests* table on the *Home* page to view requests.

To view a request from the Individual Requests table:

1. Select **View** for a request. The request page opens.



2. Click the tab you wish to view:



- **Project Information:** Basic information regarding the request
- **Attachments to IR:** Technical data supported by studies and their attachments.
- **General:** Details for the Uploads tab.
- **Uploads:** Repository for required documentation.
- **Signature:** The final signatures for the request.

If the request is still a draft and you're a company admin or request manager, you can make changes. For more information see [Modifying a Draft Interconnection Request](#).

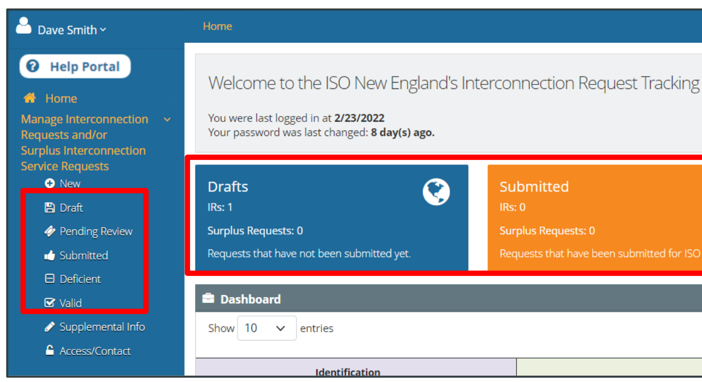
Viewing a Summary of Interconnection Requests

Company admins, request managers, and request viewers can view interconnection requests based on status. If you cannot find a request, you may not have access to it. If you need access to an interconnection request, contact the company admin for your company.

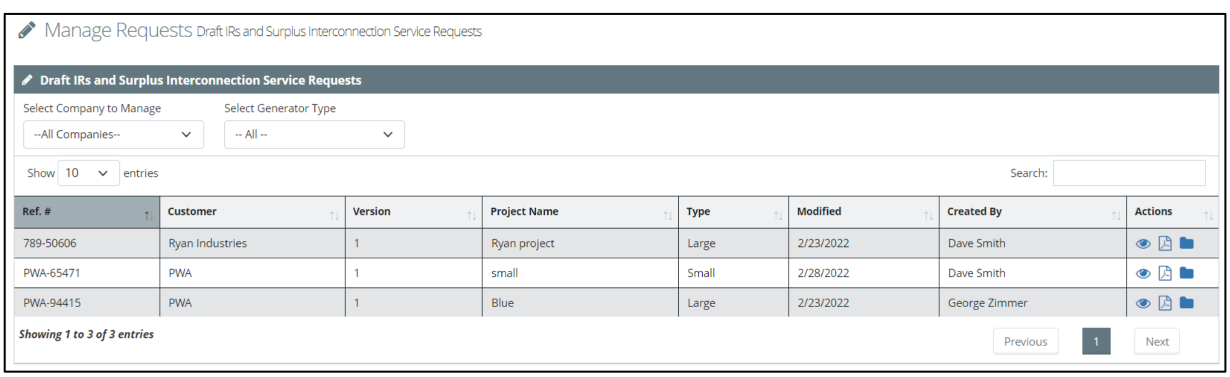
To view a request status:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests**

   Select the status of the request you wish to view (Draft, Pending Review, Submitted, Deficient, Valid). You can also click a status tile. The page of the status you selected opens.

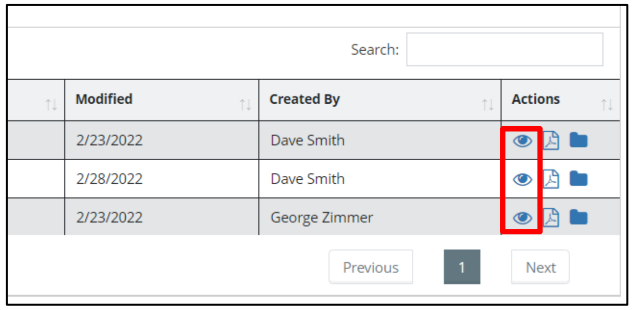


   If desired, use the **Select Company to Manage** or the **Select Generator Type** drop-down lists to filter the drafts.



Ref. #	Customer	Version	Project Name	Type	Modified	Created By	Actions
789-50606	Ryan Industries	1	Ryan project	Large	2/23/2022	Dave Smith	
PWA-65471	PWA	1	small	Small	2/28/2022	Dave Smith	
PWA-94415	PWA	1	Blue	Large	2/23/2022	George Zimmer	

2. Click **View request and manage attachments** for the request you want to view. Depending on the selection you made, one of the following opens:
    - Large Generator Request page
    - Small Generator Request page
    - Elective Transmission Upgrade Request page
    - Surplus Interconnection Service Request



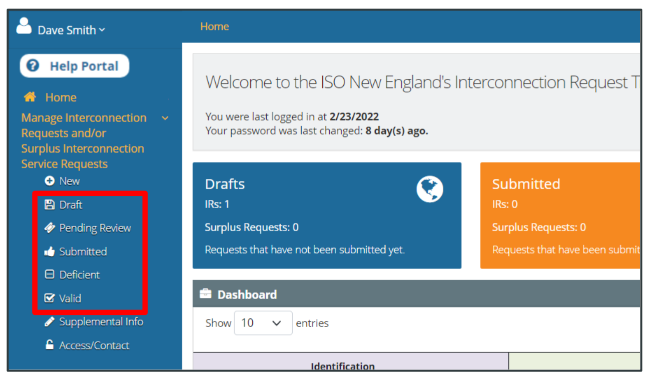
Viewing Uploads for an Interconnection Request

Company admins, request managers, and request viewers can view attached documents for an interconnection request. If you cannot find a request, you may not have access to it. If you need access to an interconnection request, contact the company admin for your company.

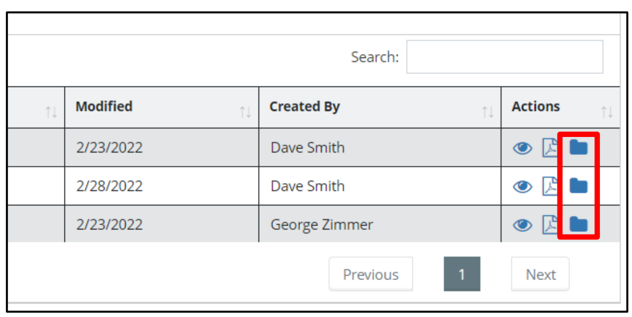
To view uploaded documents:

1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests**

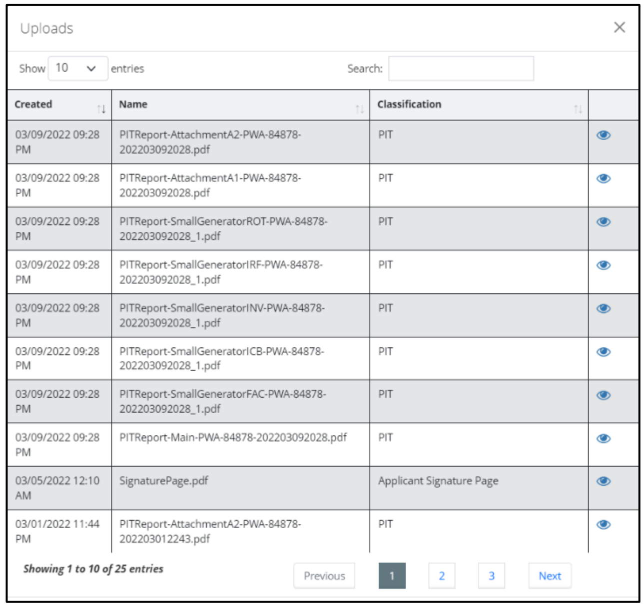
    Select the status of the request you wish to view (Draft, Pending Review, Submitted, Deficient, Valid). You can also click a status tile. The page of the status you selected opens.



2. Click **View Uploads** for the attachment you want to view. The *Uploads* dialog box opens.



3. Click **View** for the attachment you want to view. The attachment opens.



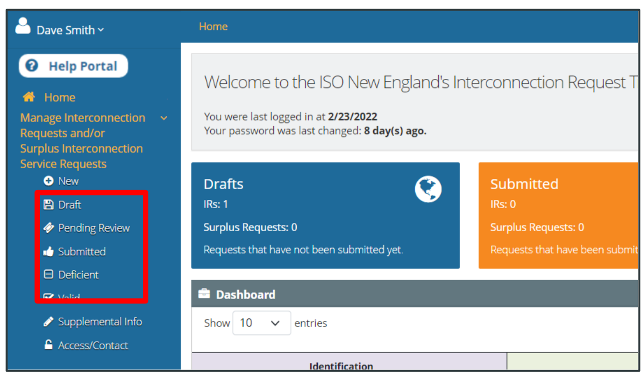
Exporting an Interconnection Request

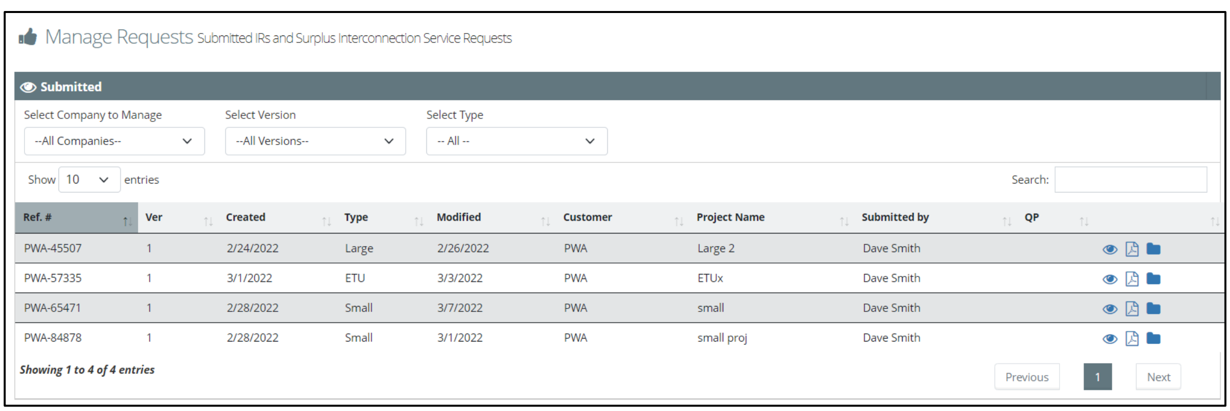
Company admins, request managers, and request viewers can export an interconnection request as a PDF, Word, or Excel document. If you cannot find a request, you may not have access to it. If you need access to an interconnection request, contact the company admin for your company.

To export a request:

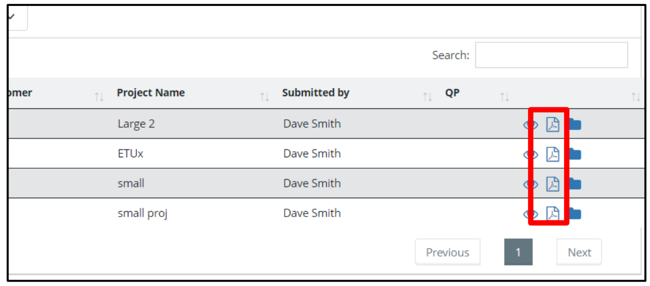
1. Click **Manage Interconnection Requests and/or Surplus Interconnection Service Requests**

   Select the status of the request you wish to access (Draft, Pending Review, Submitted, Deficient, Valid).

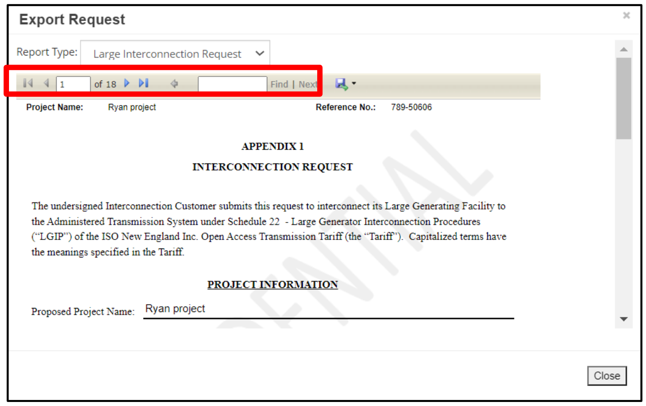




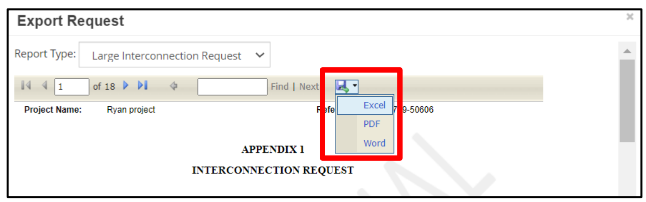
2. Click **Export request and attachments as PDF** for the request you want to export. The *Export Request* dialog box opens.



3. Use the page functions to view the pages of the selected request.



4. Click the **Export drop down menu**. Select the desired export format (Excel, PDF, or Word).



The request is created in the selected format.

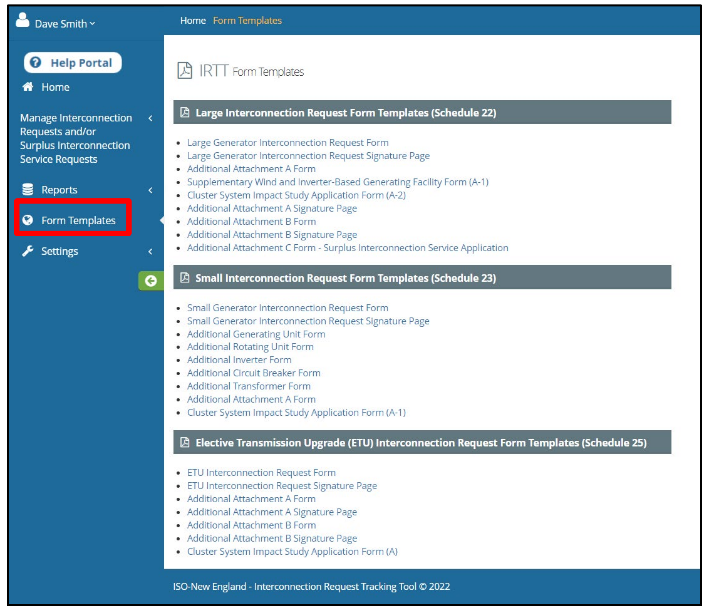
Click **Close** to return to the request page.

Interconnection Requests Form Templates

Company admins, request managers, and request viewers can view the large, small, elective transmission update, and surplus interconnection requests as templates. The Form Templates page lists all of the components required for each interconnection request as separate PDF pages that you can download and print.

To access the Form Templates page:

1. Click **Form Templates** from the navigation menu. The *Form Templates* page opens.
2. Select the template you want to view. The template opens as a PDF.

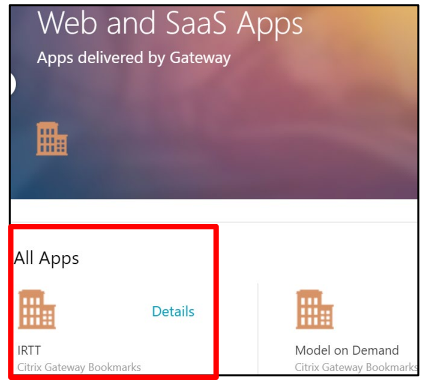


Viewing the Public Queue

The public queue lists all the active, withdrawn, commercial, and pending requests for public viewing. You can access the public queue from the IRTT sign in page or from the navigation menu. For more information, see *Access Public version of ISO Queue* in the Help Portal.

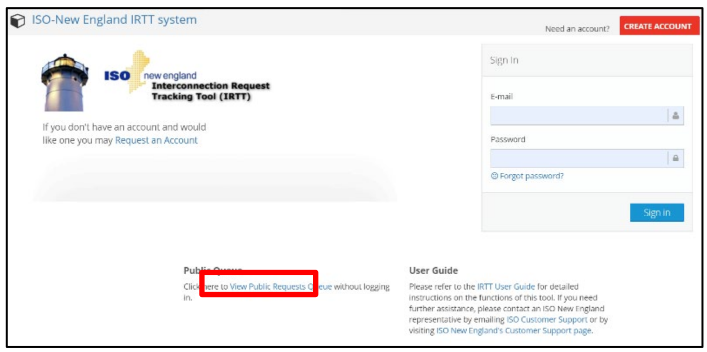
To view the public queue from the sign in page:

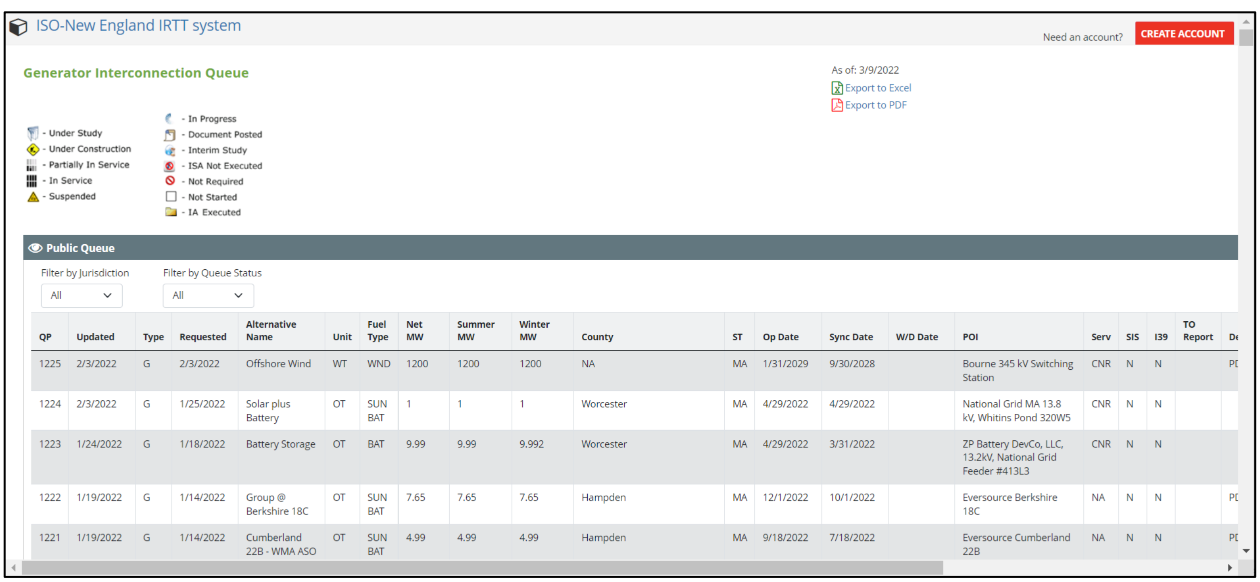
1. Navigate to https://portal.iso-ne.com. The ISO New England portal displays.
2. Select the **IRTT** app. The IRTT sign in screen displays.



3. Click **View Public Requests Queue**. The *Generator Interconnection Queue* page opens.

   For more information, see *Find developer or project names, or other details for generator interconnections in the ISO Queue* in the Help Portal.

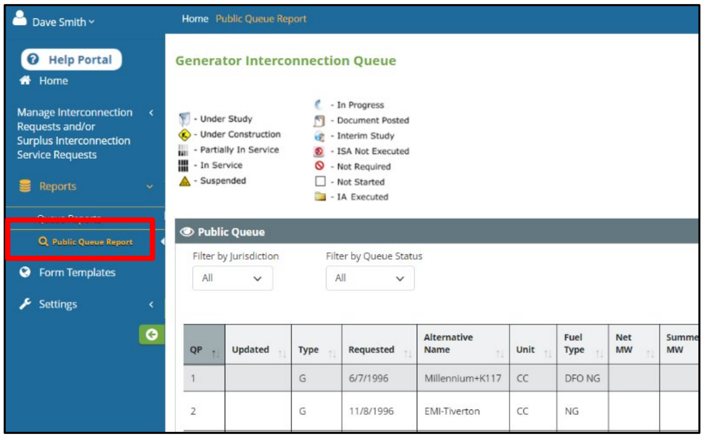




QP	Updated	Type	Requested	Alternative Name	Unit	Fuel Type	Net MW	Summer MW	Winter MW	County	ST	Op Date	Sync Date	W/D Date	POI	Serv	SIS	I39	TO Report	De
1225	2/3/2022	G	2/3/2022	Offshore Wind	WT	WND	1200	1200	1200	NA	MA	1/31/2029	9/30/2028		Bourne 345 kV Switching Station	CNR	N	N		PD
1224	2/3/2022	G	1/25/2022	Solar plus Battery	OT	SUN BAT	1	1	1	Worcester	MA	4/29/2022	4/29/2022		National Grid MA 13.8 kV, Whitins Pond 320W5	CNR	N	N		
1223	1/24/2022	G	1/18/2022	Battery Storage	OT	BAT	9.99	9.99	9.992	Worcester	MA	4/29/2022	3/31/2022		ZP Battery DevCo, LLC, 13.2kV, National Grid Feeder #413L3	CNR	N	N		
1222	1/19/2022	G	1/14/2022	Group @ Berkshire 18C	OT	SUN BAT	7.65	7.65	7.65	Hampden	MA	12/1/2022	10/1/2022		Eversource Berkshire 18C	NA	N	N		PD
1221	1/19/2022	G	1/14/2022	Cumberland 22B - WMA ASO	OT	SUN BAT	4.99	4.99	4.99	Hampden	MA	9/18/2022	7/18/2022		Eversource Cumberland 22B	NA	N	N		PD

To view the public queue from the navigation menu:

1. Click **Reports > Queue Reports > Public Queue Report** from the navigation menu. The *Generator Interconnection Queue* page opens.



Appendix

Functions Available to Roles

The following table details the functions available to the different user roles:

IRTT Function	Company Admin	Request Manager	Request Viewer
Create new draft interconnection requests	X	X	
Assign users to view/edit interconnection requests	X	X	
Submit completed draft interconnection requests (if assigned)	X	X	
Edit/delete draft interconnection requests (if assigned)	X	X	
Cure interconnection requests (create new interconnection request version)	X	X	
View interconnection requests (if assigned)	X	X	X
Modify company details	X		
Add new users	X		
Add new customer representatives	X		
Set permissions for users in company	X		
Edit user contact information (all users in company)	X		
Edit user contact information (self only)	X	X	X
View public queue	X	X	X

Helpful Links

The following is a list of helpful links:

- **ISO New England Home Page:** http://www.iso-ne.com
- **ISO New England Training Page:** http://www.iso-ne.com/participate/training
- **ISO New England FAQ Page:** http://www.iso-ne.com/participate/support/faq
- **SMD Site for ISO Applications:** https://smd.iso-ne.com/
- **SMD Site for ISO Sandbox Applications:** https://sandboxsmd.iso-ne.com/
- **ISO New England Glossary and Acronyms:** http://www.iso-ne.com/participate/support/glossary-acronyms