



# MECT USER GUIDE

MECT User Guide  
11-10-2025

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## I. DISCLAIMER

The following materials have been developed for use as training materials only. These materials do not and are not intended to support, govern, or affect in any way market or other activities; other than the training for which these materials were developed. Those seeking governance or business practice guidance are urged to consult relevant sections of the MISO Tariff and Business Practice Manuals available through the MISO website.

Any data used in these materials or in training scenarios is test data developed solely for use in a test environment for training purposes. None of this data should be relied upon for any purpose other than the training for which it was developed.

Any questions related to appropriate use of these materials should be directed through a ticket in the [Help Center](#).

## 1. INTRODUCTION

The objective of the MISO Module E-1 Capacity Tracking (MECT) User's Guide is to provide Market Participants (MPs) with a detailed overview of the components within the MECT tool. This document details the execution steps for each component.

This material is subject to change as the market matures.

This document assumes you are familiar with the MISO Business Practice Manuals (BPMs). Additionally, this document assumes you have fundamental MISO Market knowledge, while building upon that knowledge to interact with the MECT application. This reference should assist customers in:

- Reproducing specific tasks within the MECT tool.
- State what resource adequacy concepts are addressed by each screen.
- Identify some of the validations performed by the MECT tool.

## 1.1 PURPOSE

This overview document is comprised of sections to provide an organized, coherent guide to the MISO MECT application. These first sections offer basic background information. The second section provides a step-by-step guide for each of the application screens.

## 2. MECT APPLICATION ENVIRONMENTS

There are two environments available to interact with the MECT tool, Customer Connectivity Environment, often referred to as the CCE(Test) and Production. The CCE environment is used to allow MISO Market Participants to test new features and functionality in the MECT tool. The Production environment is where live business functions take place. **Google Chrome or Microsoft Edge are the recommended browsers for MECT. Other web browsers are not supported.**

### 2.1 ACCESSING CCE (TEST) ENVIRONMENT

Access to the Module E Capacity Tracking (MECT) application in MISO's Customer Connectivity Environment (CCE) requires a Local Security Administrator (LSA) to provision access using the Self-Service LSA tool in CCE. This is a separate instance of the tool from what is used in production.

To access the Self-Service LSA Tool in CCE, go to:

<https://cce.midwestiso.org/marketportal/>

The LSA will be prompted to select the digital certificate that is registered to the LSA account. Once in the CCE Market Portal, navigate to the Self-Service LSA (SSLSA) card and select the Create/Manage Portal Users link.

To manage user access, choose the Create/Manage Portal User link. The LSA can choose to update an existing user or create a new user for access to systems in CCE.

For access to MECT, the following roles are available for provisioning. These roles can be found in the Market Participant User Roles section:

- Module E Capacity Tracking (MECT) (Submit)
- Module E Capacity Tracking (MECT) (View)

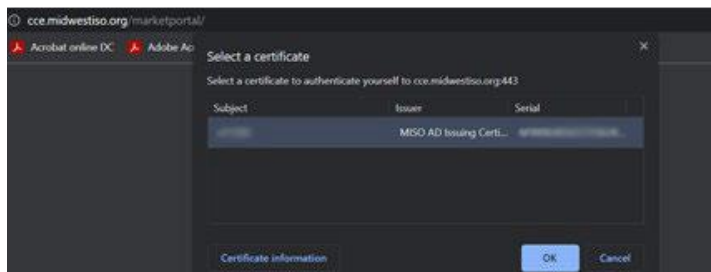
For more information on user provisioning, reference the [Self-Service LSA Tool User Guide](#).

### Having Trouble Accessing CCE?

If you do not have access to MECT in CCE, please contact your company's registered LSA. If you are unsure who your LSA is for your company, please reach out to the Client Services & Readiness team at [Help Center](#).

### STEP-BY-STEP INSTRUCTIONS

- 1) Go to: <https://cce.midwestiso.org/marketportal/>
- 2) Select a certificate to authenticate yourself and click OK.



*Note: If you do not have access to the system, you will need to contact your organization's LSA with the information above to be provisioned access.*

## 2.2 ACCESSING MECT PRODUCTION ENVIRONMENT

Access to the Module E Capacity Tracking (MECT) application requires a Local Security Administrator (LSA) to provision access using the Self-Service LSA tool.

Access via the MISO Market Portal:

<https://markets.midwestiso.org/marketportal/>

The LSA will be prompted to select the digital certificate that is registered to the LSA account. Once in the Market Portal, navigate to the Self-Service LSA (SSLSA) card and select the Create/Manage Portal Users link.

To manage user access, choose the Create/Manage Portal User link. The LSA can choose to update an existing user or create a new user for access to systems.

For access to MECT, the following roles are available for provisioning. These roles can be found in the Market Participant User Roles section:

- Module E Capacity Tracking (MECT) (Submit)
- Module E Capacity Tracking (MECT) (View)

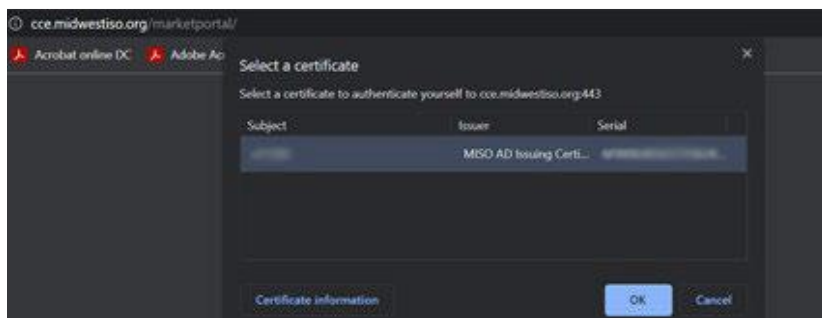
For more information on user provisioning, reference the [Self-Service LSA Tool User Guide](#).

### Having Trouble Accessing MECT?

If you do not have access to MECT, please contact your company's registered LSA. If you are unsure who your organization's LSA is for your company, please reach out to the Client Services & Readiness team via the [Help Center](#) - <https://help.misoenergy.org/>.

### STEP-BY-STEP INSTRUCTIONS

- 1) Go to: <https://midwestiso.org/marketportal/>
- 2) Select a certificate to authenticate yourself and click OK.



*Note: If you do not have access to the system, you will need to contact your LSA with the information above to be provisioned access.*

Market Portal

Applications

Search

MUI 2.0 Member Readiness

Provides participants with a tool to communicate readiness for the transition to the Market User Interface (MUI) 2.0.

Launch

Module E Capacity Tracking (MECT)

Provides a mechanism for Market Participants to manage capacity positions within Module E-1 such as submitting load forecasts, registering Load Modifying Resources, entering bilateral transactions, and submitting offers into the Planning Resource Auction.

[MECT View/Submit](#)
[LBA Transmission Los...](#)

OATI OASIS and webTrans

OATI hosts MISO OASIS and webTrans solutions which allow customers to manage scheduling, tagging, OASIS activities, outage management, congestion, and reserves. Companies must be registered with OATI to access these systems.

[webTrans Login](#)
[OASIS Login](#)

Outage Scheduler (CROW)

Allows users to submit and update outage tickets. Access is limited to stakeholders who report outages on transmission or generation equipment.

Login

Service Request

### 3. ROLES

Roles in the MECT tool are assigned at the Market Participant or Electric Distribution Company (EDC) level. As a result, a role provisioned to a Market Portal user allows that user to access information pertaining to all Asset Owners under the Market Participant. EDCs do not have Asset Owners and thus this distinction does not apply.

An entity's Local Security Administrator (LSA) is responsible for assigning roles to their Market Portal users. Refer to the 'Local Security Administrator User Guide' on the MISO public website (Market Operations>Technical Infrastructure>Related Documents>Local Security Administrator User Guide).

**Operator Submit:** Allows the user to submit and view data on behalf of each one of the Market Participant's Asset Owners.

**Operator View:** Allows the user to view data on behalf of each one of the Market Participant's Asset Owners.

**EDC Submit:** Allows the user to submit and view data on behalf of the Electric Distribution Company.

**EDC View:** Allows the user to view data on behalf of the Electric Distribution Company.

## 4. MECT HOME PAGE

Once the user selects the MECT menu item the system will present them with a new browser window or tab. This new window or tab will contain the MECT tool.

Depending on the user's company and its profile in participating in the Module E-1, users may be granted various types of access in the MECT application. As an example, a user who is representing a company that has asset ownership of capacity resources will have the ability to access the displays that allow them to administer the planning resources, offer them into the Planning Resource Auction (PRA) and/or utilize them in a Fixed Resource Adequacy Plan (FRAP). The top right-hand corner will display what environment of MECT you are in.

**MISO Resource Adequacy**

Home Contacts Forecast Planning Resources Fulfillment Post Auction Activities OMS Documentation

Search...

MECT Home 06/2024 - 05/2025

PRA Progress Summary		
	Start	End
<b>Forecast</b>		
Coincident Peak	10/01/2023	11/01/2023
Non-Coincident Peak	10/01/2023	11/01/2023
Energy For Load	10/01/2023	11/01/2023
Full Responsibility Transaction	10/01/2023	11/01/2023
<b>Planning Resources</b>		
Registration	12/15/2023	03/01/2024
Non-GADS Resource Registration	10/01/2023	11/01/2023
Confirm SAC	12/15/2023	03/25/2024
Convert SAC	12/15/2023	03/25/2024
<b>Fulfillment</b>		
FRAP	12/15/2023	03/11/2024
Hedge Registration	11/01/2023	03/09/2024
Submit Offer	03/26/2024	03/29/2024

VIEW DETAILS

**Recent Comments**  
No comments to display.

**Announcements**  
Please utilize MISO's Help Center portal (<https://help.misoenergy.org/support/>) when inquiring or submitting issues relating to Resource Adequacy and/or the MECT. You will need to sign in to create a new case or manage your existing cases. Thank you.  
  
The latest release notes can be found on the RA webpage in the RA Guides and References under the MECT section ([www.misoenergy.org/planning/resource-adequacy](http://www.misoenergy.org/planning/resource-adequacy))

Provide Feedback

## 5. CONTACTS

### Access and BPM Reference

Responsibility	Generator Owner/Operator, Load Serving Entity
User Role Requirement	Operator-Submit, EDC-Submit



## Description

The adding of contacts is the responsibility of Load Serving Entities (LSEs). Users can enter one contact for all types. Alternatively, they can enter several contacts for each of the contact types. The screens listed below will not be editable until a contact has been entered for each screen or a contact with a type of “ALL”:

Base PLC Data  
SAC (Confirm and Convert)  
Coincident Peak  
ZRC Transaction  
Energy for Load  
Forecast (Total Area Forecast)  
FRAP  
Full Responsibility Transaction  
Hedge Registration  
Non-Coincident Peak  
Registration  
Submit Offer

## 6. CONTACT PROCESSES

### Description

Users must submit a contact on the Contacts Page prior to making changes on related screens in the MECT tool. If the user creates a contact type using the type “All”, then no additional contact types are required. If the user enters a specific contact for a specific screen, then only that screen is editable.

Contacts are not related to a particular planning resource auction and will carry over year to year. When a new auction is created the user will be required to affirm the contact, if nothing has changed, removing the need to create a new contact year to year. The user can add new contacts, delete, copy, or edit existing contacts.

### 6.1 HOW TO ADD A CONTACT

- 1) From the MECT Home screen, select **Contacts**.



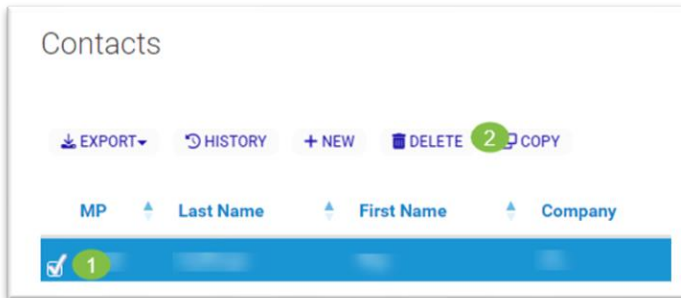
- 2) Click **New**.



- 3) Enter information into all the fields.
- 4) Click **Create**.

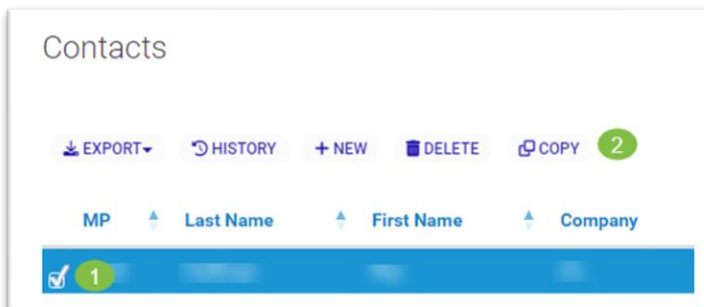
## 6.2 HOW TO DELETE CONTACT

- 1) From the Contact screen, **select box next to contact** you want to delete.
- 2) Click **Delete**.



## 6.3 HOW TO COPY A CONTACT

- 1) From the Contact screen, **select box next to contact** you want to copy.
- 2) Click **Copy**. The contact will be copied and editable.



## 7. COINCIDENT PEAK

### Access and BPM Reference

Responsibility	Load Serving Entity
User Role Requirement	Operator-Submit, Operator-View
BPM-11 Resource Adequacy	3.2.2-Coincident Peak Demand Forecast Appendix N- Demand & Energy Forecast Characteristics

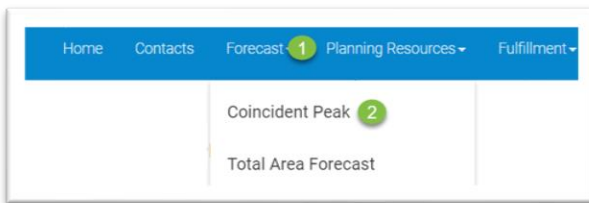
### Description

This screen is used by MPs to submit Coincident Peak Demand forecast(s) for demand that is **NOT** subject to retail switching. Forecasts are provided by Asset Owner and Local Balancing Authority. Load that is pseudo tied from one MISO Local Balancing Authority to another should be reported to the Local Balancing Authority where the load is physically located. If that Asset Owner and Local Balancing Authority is not available for entry, please enter a ticket through the [MISO Help Center](#).

## 7.1 SUBMITTING A COINCIDENT PEAK FORECAST

- 1) From the MECT Home screen, select **Forecast**.

2) Select **Coincident Peak** from the drop-down menu.



3) Select which **Season** you are entering Coincident Peak for.

4) Enter the **MISO Total CPF** and **Zonal CPF**.

5) Enter the **Percentage of CPF** for applicable states. If the demand is only in a single state and are multiple state percentage boxes, simply enter 100 and then 0 for the states that are not applicable.

6) Click **Supporting Documentation**.

MISO Coincident Peak

3 Winter 2023-2024

6 RESET SUPPORTING DOCUMENTATION COINCIDENT PEAK REPORT

Status: SUBMITTED

RZ: ignore

LBA:

HISTORY

Asset Owner	MISO Total CPF	Zonal Total CPF	LBA TL %	Alt. TL %
	481.9 MW	552.2 MW	1.3	

State	CPF
	100 %

5

7) Click **Add Document** and upload required supporting documentation.

8) Click **Save**.

< COINCIDENT PEAK   SAVE 8

Comments Section

Forecast Comments

Documents

Add Document 7

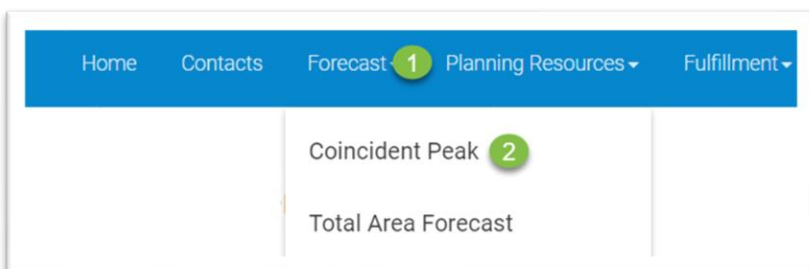
## 7.2 UPDATING A COINCIDENT PEAK FORECAST

To update a previously entered Coincident Peak Forecast (CPF), simply adjust the desired field

then click the “Submit” button. The screen will refresh with the entered data, indicating that the information has been submitted. If an update is needed after the November 1st deadline, the MP would need to contact MISO to enable an adjustment.

### 7.3 CANCELING A COINCIDENT PEAK UPDATE

- 1) From the MECT Home screen, select **Forecast**.
- 2) Click **Coincident Peak**.



- 3) Select the **Season** you are cancelling Coincident Peak.
- 4) Click **Reset**.

A screenshot of the MISO Coincident Peak form. The form has a title "MISO Coincident Peak" and a dropdown menu for the season, currently set to "Winter 2023-2024" (with a green circle containing the number 3). Below the title, there are three tabs: "RESET" (with a circular arrow icon), "SUPPORTING DOCUMENTATION" (with a green circle containing the number 4), and "COINCIDENT PEAK REPORT" (with a document icon). The status is "SUBMITTED". Below the tabs, there is a table with the following data:

Asset Owner	MISO Total CPF	Zonal Total CPF	LBA TL %	Alt. TL %
	481.9 MW	552.2 MW	1.3	

Below the table, there is a "HISTORY" tab and a "State" dropdown menu set to "CPF" with a "100 %" value. There is also an "Ignore" checkbox.

### 7.4 IGNORING A COINCIDENT PEAK FORECAST

- 1) From the MECT Home screen, select **Forecast**.
- 2) Click **Coincident Peak**.
- 3) Select the **Season** you are ignoring a Coincident Peak for.
- 4) Checking the “Ignore” box will immediately delete the values entered for a given seasonal if a given load no longer applies. If this is done in error, uncheck “Ignore” and re-enter the data.

Status: SUBMITTED

☐ Ignore

Alt. TL % ☐ Opt Out

## 7.5 COINCIDENT PEAK REPORT

- 1) From the MECT Home screen, select **Forecast**.
- 2) Click **Coincident Peak**.
- 3) Select the **Season** you want the report for.
- 4) Click **Coincident Peak Report**.

MISO Coincident Peak

3 Summer 2024 ▼

[SUBMIT](#) [CANCEL](#) [SUPPORTING DOCUMENTATION](#) [COINCIDENT PEAK REPORT](#) 4

Status: SUBMITTED

## 8. TOTAL AREA FORECAST

### Access and BPM Reference

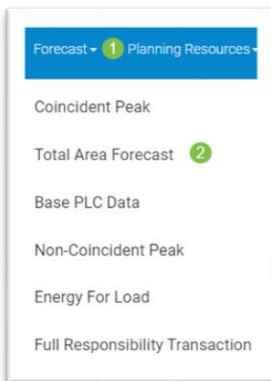
Responsibility	Electric Distribution Company
User Role Requirement	EDC-Submit
BPM-11 Resource Adequacy	3.2.3 Forecast Reporting Appendix O – Parties Responsible for Reporting Demand & Energy Forecast

### Description

The Total Area Forecast screen allows an Electric Distribution Company (EDC) to enter their EDC Area Coincident Peak Forecast. Additionally, it allows for EDCs using the default method to submit peak load contribution and view retail choice switching information.

## 8.1 SUBMITTING TOTAL AREA FORECAST

- 1) From the MECT Home screen, select **Forecast**.
- 2) Click **Total Area Forecast**.



- 3) Select the correct **Season**.
- 4) Enter **EDC Area Coincident Peak Forecast** and view retail choice switching information.
- 5) Click **EDC Documentation**.

**Note: Without EDC Documentation, EDCs will NOT be able to submit Total Area Forecast.**

Total Area Forecast Summer 2023 3

SUBMIT RESET EDC DOCUMENTATION TOTAL AREA FORECAST REPORT

EDC Owner		Total CPF(MW)		Total ZCPF(MW)		LBA TL%	ALT TL%												
		091 MW		262 MW		4.5	4.5												
<div style="display: flex; justify-content: space-between;"><div style="width: 30%;"><table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th>State</th><th>CPF</th></tr></thead><tbody><tr><td>IN</td><td>0 %</td></tr></tbody></table></div><div style="width: 30%;"><table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th>State</th><th>CPF</th></tr></thead><tbody><tr><td>MI</td><td>100 %</td></tr></tbody></table></div><div style="width: 30%;"><table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th>State</th><th>CPF</th></tr></thead><tbody><tr><td>OH</td><td>0 %</td></tr></tbody></table></div></div>								State	CPF	IN	0 %	State	CPF	MI	100 %	State	CPF	OH	0 %
State	CPF																		
IN	0 %																		
State	CPF																		
MI	100 %																		
State	CPF																		
OH	0 %																		

- 6) Select **Add Document** to upload information.
- 7) Click **Save**.

[< TOTAL AREA FORECAST](#)
[SAVE](#)
7

**Comments Section**

Forecast Comments

Summer 2023 Forecast EDC

---

**Documents**

[+ Add Document](#)
6

## 8.2 EDIT EDC DOCUMENTATION

1) Click **EDC DOCUMENTATION**.

Total Area Forecast Summer 2023 ▼

[SUBMIT](#)
[RESET](#)
[EDC DOCUMENTATION](#)
1
[TOTAL AREA FORECAST REPORT](#)

RZ:	EDC Owner		Total CPF(MW)		Total ZCPF(MW)		LBA TL%	ALT TL%
			091	MW	262	MW	4.5	4.5
LBA:								
	State	CPF	State	CPF	State	CPF		
	IN	0 %	MI	100 %	OH	0 %		

2) Add **Document**.

3) Click **SAVE**.



< TOTAL AREA FORECAST
SAVE
3

Comments Section
Forecast Comments
Summer 2023 Forecast EDC

Documents

+ Add Document
2

NOTE: Without EDC Documentation submitted, EDCs will not be able to submit the Total Area Forecast.

## 9. BASE PLC DATA

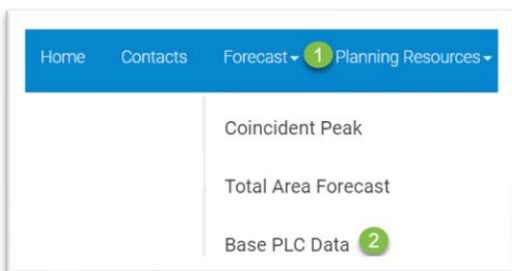
### Access and BPM Reference

Responsibility	Electric Distribution Company
User Role Requirement	Operator- Submit, Operator- View, EDC-Submit
BPM-11 Resource Adequacy	5.7.3 Peak Load Contribution (PLC)

### Description

The Base PLC Data screen allows EDCs using the default method to submit peak load contributions.

- 1) From the MECT home screen, select **Base PLC Data**.
- 2) Click **Base PLC Data**.



3) Select the **Season**.

4) Enter **Base PLC Data** into the corresponding boxes.

## 10. NON-COINCIDENT PEAK

### Access and BPM Reference

Responsibility	Load Serving Entity
User Role Requirement	Operator-Submit, Operator-View
BPM-11 Resource Adequacy	3.2.1 Non-Coincident Peak Demand and Energy for Load Forecasts Appendix N – Demand & Energy Forecast Characteristics

### Description

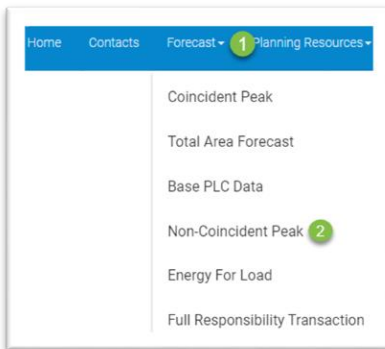
The Non-Coincident Peak Forecast screen is used by the Market Participant to submit non-coincident peak demand forecasts by Asset Owner and Local Balancing Authority for NERC MOD Standards, the OMS-MISO Survey and Long-Term Reliability Assessment (LRTA) report purposes, FERC 714 reporting and other downstream processes at MISO. When reporting the Non-Coincident Peak data, LSEs should include any estimated transmission losses in the data. The exception to including transmission losses is the value used for the annual ARR Allocation. LSEs under the Retail Choice program will not be required to submit the Non-Coincident Peak forecast as EDCs will be responsible for submitting the data for the EDC area.

Load that is pseudo tied from one MISO Local Balancing Authority to another should be reported in the Local Balancing Authority where the load is physically located. If that Asset Owner and

Local Balancing Authority combination is not available for entry, contact the MISO Resource Adequacy team via the [MISO Help Support](#) portal.

## 10.1 SUBMITTING NON-COINCIDENT PEAK FORECAST

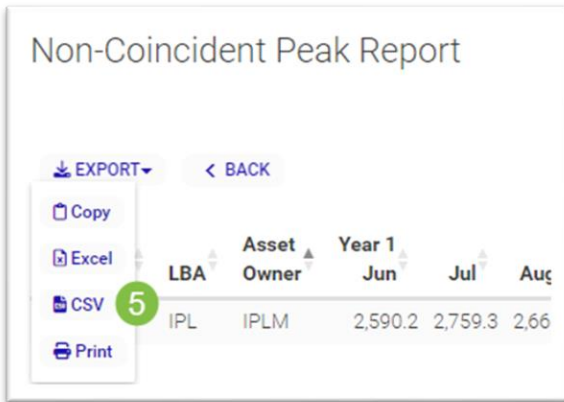
- 1) From the MECT Home screen, select **Forecast**.
- 2) Click **Non-Coincident Peak**.



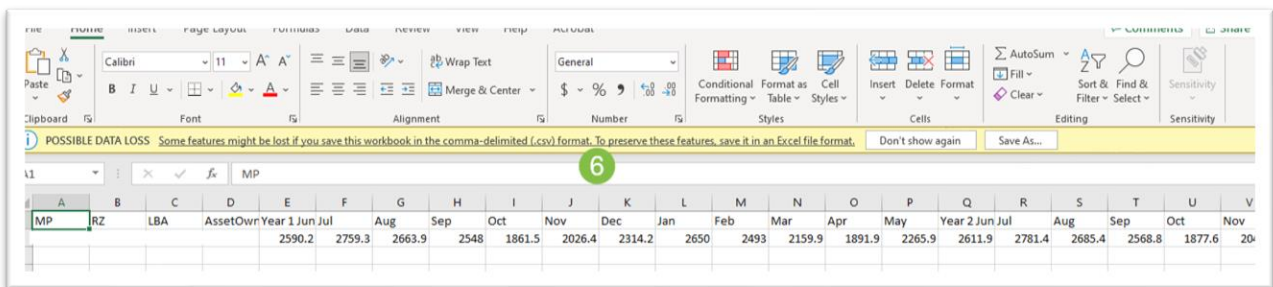
- 3) Select **Planning Year**.
- 4) Click **Non-Coincident Peak Report**.

A screenshot of the 'Non-Coincident Peak' report form. The form title is 'Non-Coincident Peak'. In the top right corner, there is a green circle with the number '3' next to the date range '06/2023 - 05/2024'. Below the title, there are four buttons: 'SUBMIT', 'CANCEL', 'NON-COINCIDENT PEAK REPORT' (highlighted with a green circle and a '4' next to it), and 'UPLOAD'. To the right of these buttons, the status is 'SUBMITTED'. Below the buttons, there is a section titled 'Data for ARR Allocation for 06/2023 - 05/2024' with an 'Ignore' checkbox. This section contains a table with columns for 'RZ:', 'LBA:', 'Asset Owner:', 'Network:', 'GFA A:', 'GFA B:', and 'GFA CO:'. The 'Network:' column has the value '693.1 MW'. Below the table, there is an orange box with a bell icon and the text 'Network = Gross Forecast (inclusive of DR, BTMG) - Transmission Loss - GFA A - GFA B - GFA CO'.

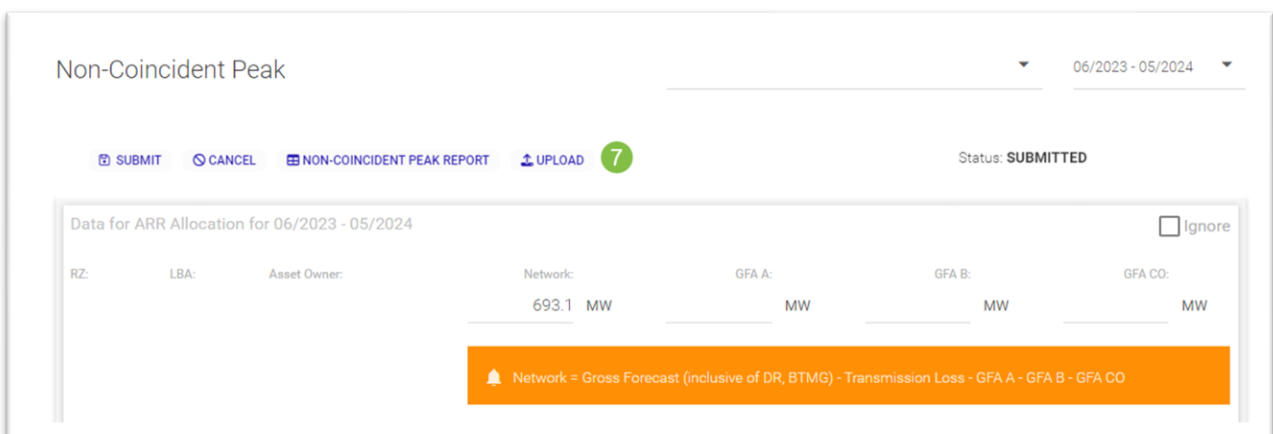
- 5) Export out as a **CSV** file.



6) Edit in **Excel** or other editor any information that needs update for any/all needed forecasts. A single file can be used to edit all Non-Coincident Peak forecasts at once. Save as a **.CSV file format**.  
 {Note: System will only upload .CSV}



7) From the Main Screen, click **Upload**.



8) Click **File** and select the **CSV file** to upload or drag and drop the proper file into the pop-up modal.

9) Click **Upload**.

Upload Non-Coincident Peak

The CSV file to be uploaded can be exported from the Non-Coincident Peak Report page.

File 

8

CLO 

9

UPLOAD

A report will display the results of the upload, which forecasts were edited, which were rejected and why, by cell if any given entry caused a validation error.

### Upload Results: Non-Coincident Peak

#### Notes

- Items marked with "Error:" will prevent a row from being updated.
- Items marked with "Warning:" will not prevent a row from updating.
- A row will have been updated if either "Updated." or "Updated, but there were warnings." appear
- For this import, all numerical values are rounded (half up) to the nearest tenth.
- During testing it was noticed that deleting rows in Excel using the physical keyboard delete button are seeing something like this use the context menu to delete or open the .csv in a text editor like

[EXPORT](#) [< BACK](#)

Line						Year		
Number	Result	MP	RZ	LBA	AssetOwner	1 Jun	Jul	Aug
2	Error: Did not pass validation.					Error: "test" is not a valid decimal.	Error: "-1" must be greater than or equal to zero.	Error: "999999" must be less than 99,999.9.

Minor edits can still be made in the interface for individual value corrections but are not the main way to enter the data in bulk.

10) Click **Submit**.

Non-Coincident Peak

SUBMIT
10
CANCEL

NON-COINCIDENT PEAK REPORT

UPLOAD

### 10.2 UPDATING NON-COINCIDENT PEAK FORECAST

MPs wishing to update a Non-Coincident Peak Forecast after the November 1<sup>st</sup> deadline must contact MISO Resource Adequacy to arrange an unlock of the screen. Once the screen has been unlocked the “Submit” button can be clicked. To update the Non-Coincident Peak, you will follow the same steps as section 10.1 Submitting Non-Coincident Peak by exporting and importing.

## 11. ENERGY FOR LOAD

### Access and BPM Reference

Responsibility	Load Serving Entity
User Role Requirement	Operator-Submit, Operator-View
BPM-11 Resource Adequacy	3.2.1 Non-Coincident Peak Demand and Energy for Load Forecasts Appendix N – Demand & Energy Forecast Characteristics

### Description

The Energy for Load Screen is used by Market Participants to submit their energy for load data by Asset Owner and Local Balancing Authority for NERC reporting purposes. LSEs under the Retail Choice program will not be required to submit the energy for load data as EDCs will be responsible for submitting the data for the EDC area.

Load that is pseudo tied from one MISO Local Balancing Authority to another should be reported in the Local Balancing Authority where the load is physically located. If that Asset Owner and Local Balancing Authority combination is not available for entry, please contact the MISO Resource Adequacy team.

Energy for load reported on this screen is not subject to retail switching.

### 11.1 SUBMITTING ENERGY FOR LOAD DATA

- 1) Navigate to **Forecast** in the header menu.
- 2) Select **Energy for Load**.

Forecast ▾ 1 Planning Resources ▾

Coincident Peak

Total Area Forecast

Base PLC Data

Non-Coincident Peak

Energy For Load 2

Full Responsibility Transaction

- 3) Select correct **Planning Year**.
- 4) Click **Energy for Load Report**.

Energy For Load

3 06/2023 - 05/2024 ▾

SUBMIT

CANCEL

ENERGY FOR LOAD REPORT 4

UPLOAD

Status: SUBMITTED

RZ: LBA: Asset Owner:

☐ Ignore

06/2023 - 05/2024

Jun	1235.1 GWh	Jul	1402.7 GWh	Aug	1350.8 GWh	Sep	1109.7 GWh	Oct	1020.2 GWh	Nov	1037.6 GWh
Dec	1256.7 GWh	Jan	1363.2 GWh	Feb	1199.4 GWh	Mar	1105.4 GWh	Apr	989 GWh	May	1071.7 GWh

- 5) Export as a **CSV**.

Energy For Load Report

EXPORT ▾ < BACK

Copy

Excel

CSV 5

Print

LBA	Asset Owner	Year 1	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
			1,235.1	1,402.7	1,350.8	1,109.7	1,020.2	1,037.6	1,256.7	1,363.2	1,199.4

- 6) Edit in **Excel** or other editor any information that needs update for any/all needed forecasts. A single file can be used to edit all Energy for Load forecasts at once. Save as a **CSV file format**  
{Note: System will only upload .CSV}
- 7) From the main screen, click **Upload**.

Energy For Load 06/2023 - 05/2024

[SUBMIT](#)
[CANCEL](#)
[ENERGY FOR LOAD REPORT](#)
[UPLOAD](#) 7
Status: **SUBMITTED**

RZ: LBA: Asset Owner: ☐ Ignore

06/2023 - 05/2024					
Jun	Jul	Aug	Sep	Oct	Nov
1235.1 GWh	1402.7 GWh	1350.8 GWh	1109.7 GWh	1020.2 GWh	1037.6 GWh
Dec	Jan	Feb	Mar	Apr	May
1256.7 GWh	1363.2 GWh	1199.4 GWh	1105.4 GWh	989 GWh	1071.7 GWh

- 8) Click **File** and select the **CSV file** to upload or drag and drop the file into the pop-up modal.  
 9) Click **Upload**.

Upload Energy For Load ×

The CSV file to be uploaded can be exported from the Energy For Load Report page.

File 8

CLOSE 9 UPLOAD

Similar to the Non-Coincident Peak upload, a report will load confirming the results of the upload and if any forecast were rejected, for what cells and for what reason.

Again, minor edits can still be made in the interface for individual value corrections but are not the main way to enter the data in bulk.

- 10) Click **Submit**.



Energy For Load

06/2023 - 05/2024

SUBMIT

10 CANCEL

ENERGY FOR LOAD REPORT

UPLOAD

Status: SUBMITTED

RZ:

LBA:

Asset Owner:

Ignore

06/2023 - 05/2024

Jun	1235.1 GWh	Jul	1402.7 GWh	Aug	1350.8 GWh	Sep	1109.7 GWh	Oct	1020.2 GWh	Nov	1037.6 GWh
Dec	1256.7 GWh	Jan	1363.2 GWh	Feb	1199.4 GWh	Mar	1105.4 GWh	Apr	989 GWh	May	1071.7 GWh

Note: On the Energy for Load Report, by holding the “shift” key and mouse click on the sort icon of each column to be sorted. This works on any screen with a data table.

Energy For Load Report

06/2023 - 05/2024

+

BACK

EXPORT

Search

MP

RZ

LBA

Asset Owner

Year 1

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Jan

Feb

Mar

Apr

May

Year 2

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Jan

Feb

Mar

Apr

May

Year 3

Sum/Fall

Win/Spr

## 11.2 UPDATING ENERGY FOR LOAD DATA

MPs wishing to update Energy for Load data after the November 1<sup>st</sup> deadline will contact MISO Resource Adequacy to arrange an unlock of the screen. Once changes have been made, the “Submit” button can be clicked. Note: After clicking the “Submit” button, all subsequent changes will be considered submitted. You can update a single entry or use the export/import function detailed in 11.1 Submitting Energy for Load Data

## 12. FULL RESPONSIBILITY TRANSACTION

### Access and BPM Reference

Responsibility	Load Serving Entity
User Role Requirement	Operator-Submit, Operator-View
BPM-11 Resource Adequacy	3.3 Full Responsibility Transactions

### Description

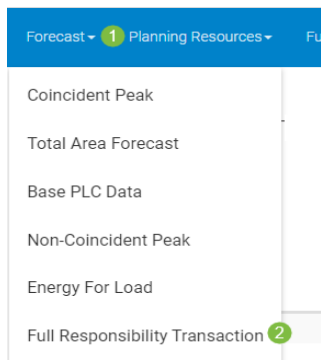
The Full Responsibility Transaction (FRT) screen allows a Market Participant to enter Full Responsibility Sales (FRS) and Full Responsibility Purchases (FRP). This screen allows both parties to view all FRTs that they are specified as a counter party on. Only the Buyer of an FRT may initiate the transaction.

The MW amount associated with a confirmed FRT is added to the respective Seller and subtracted from the Buyer's demand portion of the PRMR calculation. Approved FRTs will be reflected on the PRMR Calculation page. All MW amounts associated with pending FRTs are held in escrow until the FRT is confirmed, rejected, or deleted.

FRTs may only be entered up to the amount of the Coincident Peak Demand Forecast minus any pending or approved FRPs and/or plus an approved FRS.

## 12.1 SUBMIT A FULL RESPONSIBILITY TRANSACTION

- 1) Navigate to **Forecast** in the header menu.
- 2) From the drop-down select **Full Responsibility Transaction**.



- 3) Use the drop-down to select season.
- 4) Select **New**.

Full Responsibility Transaction Summer 2026 3

EXPORT
▼
HISTORY
🔍
🔗
+ NEW 4
Search

Contract Name	Buyer NERC ID	Buyer Asset Owner	Buyer Status	Seller NERC ID	Seller Asset Owner	Seller Status	RZ	LBA	Amount (MW)	Contract Status
No data available in table										

Showing 0 to 0 of 0 entries Show 15 entries Previous Next

- 5) Enter **Contract Name**.
- 6) Enter **Amount MW**.
- 7) Use drop-down to select **Buyer Asset Owner**.
- 8) Use drop-down to select **Seller NERC ID**.
- 9) Use drop-down to select **Seller Asset Owner**.
- 10) Use drop-down to select **Resource Zone**.
- 11) Use drop-down to select **LBA Name**.

12) Select **Submit** to save or **Cancel** to return without saving any changes.

## 12.2 COPY FULL RESPONSIBILITY TRANSACTION

To copy an FRT, click on the down arrow next to the Contract Name in the list of FRTs and select “Copy”. The system will copy that FRT into the FRT data entry fields. This FRT is then ready to submit.

To confirm or reject an FRT, click the down arrow to the left of the Contract Name in the FRT Transaction List with a buyer or seller status of Pending and choose “Accept” or “Reject”. Upon doing so the tool will immediately increase the seller’s demand in respective Local Balancing Authority or release the FRT amount back to the purchaser to choose to enter it into another FRT respectively.

## 13. RBDC OPT OUT DETAILS

### Access and BPM Reference

Responsibility	Planning Resource Owner
User Role Requirement	Operator-Submit, Operator-View
BPM-11 Resource Adequacy	5.3.2 – RBDC Opt Out Appendix C – Energy Efficiency Resources Appendix D – Demand Resources Appendix E- BTMG Appendix F – External Resources

## RBDC Opt Out Details

EXPORT HISTORY

NERC ID	Asset Owner	Resource Zone	LBA	Opt Out Status	Opt Out Adder %	Opt Out Adder % Effective Date	Opt Out Adder % Termination Date	Total MISO CPF
---------	-------------	---------------	-----	----------------	-----------------	--------------------------------	----------------------------------	----------------

## 14. REGISTRATION

### Access and BPM Reference

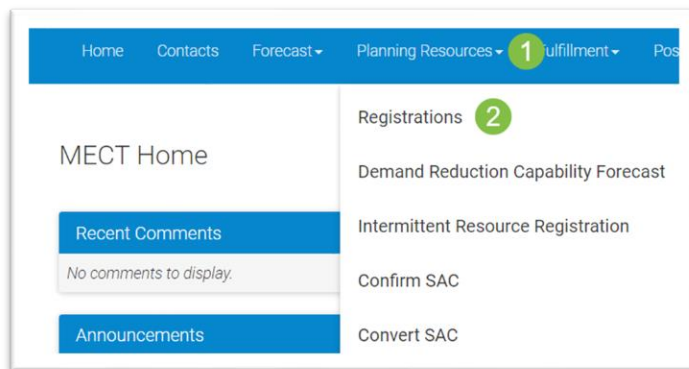
Responsibility	Planning Resource Owner
User Role Requirement	Operator-Submit, Operator-View
BPM-11 Resource Adequacy	Appendix C – Energy Efficiency Resources Appendix D – Demand Resources Appendix E- BTMG Appendix F – External Resources

### Description

The Registration screen allows for management of Planning Resource registrations including Behind-the-Meter-Generation (BTMG), External Resources, Energy Efficiency Resources and Demand Resources.

### 14.1 HOW TO REGISTER A BTMG

- 1) Navigate to **Planning Resources** in the header menu.
- 2) Select **Registrations**.



- 3) Select **Add BTMG**.

[EXPORT](#)
[+ ADD BTMG](#)
[3 ADD DR](#)
[+ ADD EE](#)
[+ ADD EXTERNAL](#)

- 4) Enter the **Name** of the BTMG.
- 5) Use the drop-down to select **Asset Owner**.
- 6) Use the drop-down to select **Local Balance Authority (LBA)**.
- 7) Enter **Description**.
- 8) Use drop-down to select **Load Zone CP Node**.
- 9) Check box to override CP Node (this is only if the default CP Node options are incorrect).
- 10) Check box is resource is being registered by an Aggregated Retail Customer (ARC).
- 11) Add Location Details.

**General information**

Name *	Plan Year 06/2026 - 05/2027	Local Balancing Authority (LBA)
Description	Asset Owner	Resource Zone (RZ)
	Load Zone CP Node	
<input type="checkbox"/> Aggregator of Retail Customer <input type="checkbox"/> Resource is being registered by an Aggregator of Retail Customer (ARC)?	Select an Asset Owner first. <input type="checkbox"/> CP Node Override?	
Customer Account Number	Customer Meter Number	Address
City	State	Zip Code

[+ Add Location Details](#)
[Upload Location Details](#)

- 12) Add **Documentation**.

**Documentation**

[+ Add Document](#)

- 13) Enter the **Demand Reduction Capability Forecast**.

This section is not required in the initial registration submittal but will be required before the registration can be approved. These forecast details can be manually entered in the registration page or can be uploaded via the Demand Reduction Capability Forecasts screen for all LMRs at once.

Demand Reduction Capability Forecast 13											
Enter the amount of MW you can inject in a given month consistent with the actual physical availability of the resource, limited by any relevant regulatory or contractual restrictions. These values should not include transmission losses. Year one values will be used as the default for the given months in the MISO Communication System (MCS).											
Plan Year 1											
June		July		August		September		October		November	
_____ MW		_____ MW		_____ MW		_____ MW		_____ MW		_____ MW	
December		January		February		March		April		May	
_____ MW		_____ MW		_____ MW		_____ MW		_____ MW		_____ MW	
Plan Year 2											
June		July		August		September		October		November	
_____ MW		_____ MW		_____ MW		_____ MW		_____ MW		_____ MW	
December		January		February		March		April		May	
_____ MW		_____ MW		_____ MW		_____ MW		_____ MW		_____ MW	
Plan Year 3			Plan Year 4			Plan Year 5			Plan Year 6		
Summer		Winter		Summer		Winter		Summer		Winter	
_____ MW		_____ MW		_____ MW		_____ MW		_____ MW		_____ MW	

14) Enter **Operator Contact Name**.

15) Enter **Operator Contact Phone**.

16) Enter **Operator Contact Email**.

Operator Contact Information		
Operator Contact Name	Operator Contact Phone	Operator Contact Email
_____ 14	_____ 15	_____ 16

17) Use the drop-down to select **Measurement Protocol**.

Measurement and Verification
What type of measurement protocol will be applied to this BTMG to measure response when called on during an EEA level 2 or higher event?
_____ 17 ▼

18) Select **Status Option**.

19) Check the box if asset is to be excluded from season.

20) Use drop-down to select **Generators**.

21) Enter **XEFORD Override**.

22) Enter **Max Interruptions**.

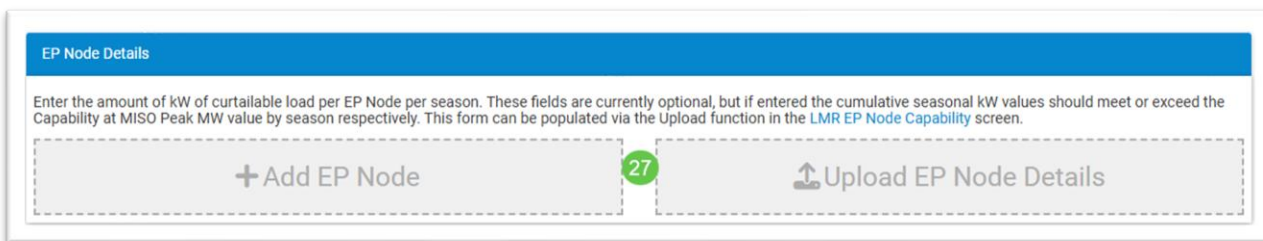
23) Use drop-down to select **Max Duration** hours.

24) Use the drop-down to select **Notification Time**.

25) Add **Notification**.

26) You will enter information for each season by repeating steps 18-25.

27) EP Node Details can be added either individually by Add EP Node or you can upload EP Node Details.

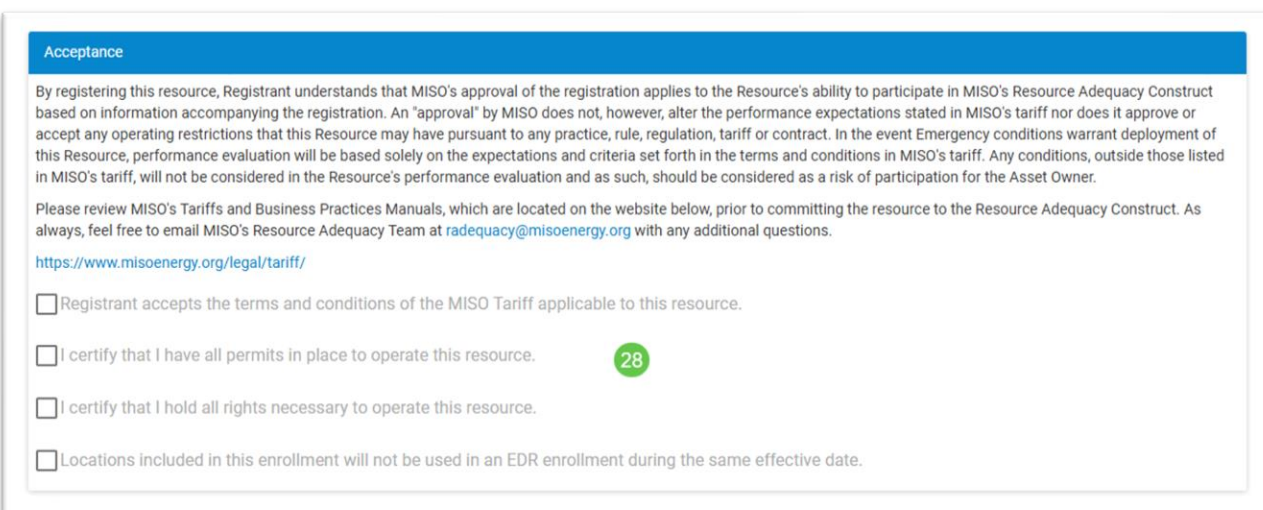


EP Node Details

Enter the amount of kW of curtailable load per EP Node per season. These fields are currently optional, but if entered the cumulative seasonal kW values should meet or exceed the Capacity at MISO Peak MW value by season respectively. This form can be populated via the Upload function in the [LMR EP Node Capability](#) screen.

+ Add EP Node 27 Upload EP Node Details

28) Check boxes to accept statements.



Acceptance

By registering this resource, Registrant understands that MISO's approval of the registration applies to the Resource's ability to participate in MISO's Resource Adequacy Construct based on information accompanying the registration. An "approval" by MISO does not, however, alter the performance expectations stated in MISO's tariff nor does it approve or accept any operating restrictions that this Resource may have pursuant to any practice, rule, regulation, tariff or contract. In the event Emergency conditions warrant deployment of this Resource, performance evaluation will be based solely on the expectations and criteria set forth in the terms and conditions in MISO's tariff. Any conditions, outside those listed in MISO's tariff, will not be considered in the Resource's performance evaluation and as such, should be considered as a risk of participation for the Asset Owner.

Please review MISO's Tariffs and Business Practices Manuals, which are located on the website below, prior to committing the resource to the Resource Adequacy Construct. As always, feel free to email MISO's Resource Adequacy Team at [radequacy@misoenergy.org](mailto:radequacy@misoenergy.org) with any additional questions.

<https://www.misoenergy.org/legal/tariff/>

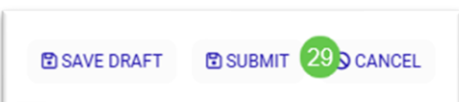
☐ Registrant accepts the terms and conditions of the MISO Tariff applicable to this resource.

☐ I certify that I have all permits in place to operate this resource. 28

☐ I certify that I hold all rights necessary to operate this resource.

☐ Locations included in this enrollment will not be used in an EDR enrollment during the same effective date.

29) **Submit** if registration is complete. **Save Draft** if you need to finish later. **Cancel** to go back to the Registration Screen without making any changes.



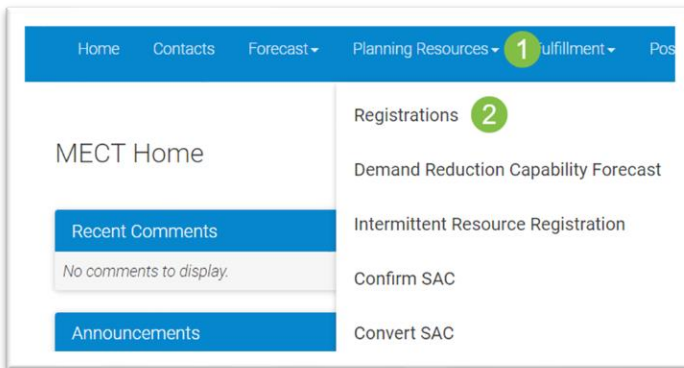
SAVE DRAFT SUBMIT 29 CANCEL

## 14.2 HOW TO RENEW A BTMG

From the Market Portal homepage, click **Launch MECT View/Submit** from the Module E Capacity Tracking (MECT) box.

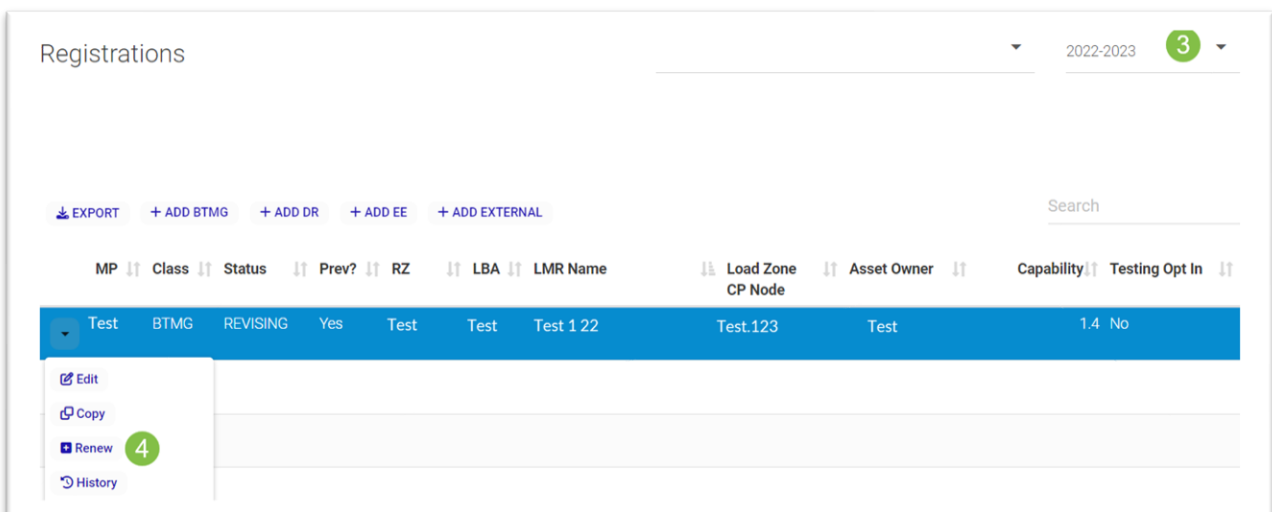
1) Navigate to **Planning Resources** in the header menu.

## 2) Select **Registrations**.



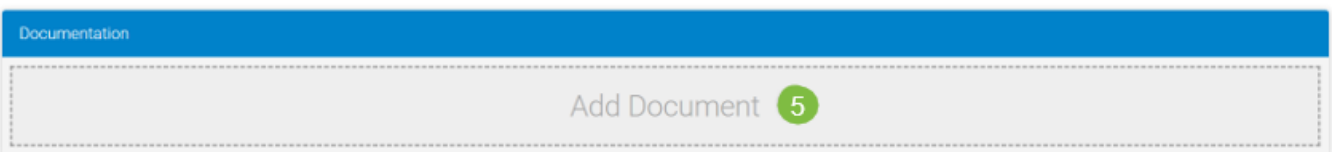
3) From the drop-down arrow next to the Planning Year, select the **PRIOR Planning Year**, from the one you are renewing for.

4) Under the list of your Registrations, find the BTMG you would like to renew. Click the **down arrow** by its name. The drop-down will appear, select **Renew**.



**Note: Basic Information from when you registered asset will carry over, but you will need to do the following:**

## 5) Add **Document**.



6) Double check that all the values are updated for the current registration. These values can be edited later or uploaded in bulk in the Demand Reduction Capabilities Forecast screen after saving draft values.



## Demand Reduction Capability Forecast 6

Enter the amount of MW you can inject in a given month consistent with the actual physical availability of the resource, limited by any relevant regulatory or contractual restrictions. These values should not include transmission losses. Year one values will be used as the default for the given months in the MISO Communication System (MCS).

Plan Year 1					
June	July	August	September	October	November
MW	MW	MW	MW	MW	MW
December	January	February	March	April	May
MW	MW	MW	MW	MW	MW

Plan Year 2					
June	July	August	September	October	November
MW	MW	MW	MW	MW	MW
December	January	February	March	April	May
MW	MW	MW	MW	MW	MW

Plan Year 3		Plan Year 4		Plan Year 5		Plan Year 6	
Summer	Winter	Summer	Winter	Summer	Winter	Summer	Winter
MW	MW	MW	MW	MW	MW	MW	MW

Plan Year 7		Plan Year 8		Plan Year 9		Plan Year 10	
Summer	Winter	Summer	Winter	Summer	Winter	Summer	Winter
MW	MW	MW	MW	MW	MW	MW	MW

7) Double check that Operator information is correct.

Operations <span>7</span>		
Operator Contact Name	Operator Contact Phone	Operator Contact Email

8) Use the drop-down to select **Measurement Protocol**.

Measurement and Verification
What type of measurement protocol will be applied to this BTMG to measure response when called on during an EEA level 2 or higher event?
<div>8</div>

9) Select **Status Option**.

10) Check the box if asset is to be excluded from season.

11) Use drop-down to select **Generators**.

12) Enter **XEFORd Override**.

13) Enter **Max Interruptions**.

14) Use drop-down to select **Max Duration** hours.

15) Use drop-down to select **Notification Time**.

16) Add **Notification**.

**Seasonal Registration Attributes**

**Summer 2026**

Registration Status  
NEW, Not Previously Approved, Updateable

**Status Options**

☒ New **9**

☐ Exclude Summer **10** 2026

**Capability**

Generators **11**

Wind Capacity Factor %

Transmission Loss %

**Capability at MISO Peak (Calculated)**

NRIS

MW

**XEFOrd**

Calculated Override

MW **12** MW

Max Interruptions **13**

Max Duration (hours) **14**

4

**Notification**

Notification Time **15**

**16** + Add Notification

17) You will enter information for each season by repeating steps 9-16.

18) Check boxes to accept statements.

**Acceptance**

By registering this resource, Registrant understands that MISO's approval of the registration applies to the Resource's ability to participate in MISO's Resource Adequacy Construct based on information accompanying the registration. An "approval" by MISO does not, however, alter the performance expectations stated in MISO's tariff nor does it approve or accept any operating restrictions that this Resource may have pursuant to any practice, rule, regulation, tariff or contract. In the event Emergency conditions warrant deployment of this Resource, performance evaluation will be based solely on the expectations and criteria set forth in the terms and conditions in MISO's tariff. Any conditions, outside those listed in MISO's tariff, will not be considered in the Resource's performance evaluation and as such, should be considered as a risk of participation for the Asset Owner.

Please review MISO's Tariffs and Business Practices Manuals, which are located on the website below, prior to committing the resource to the Resource Adequacy Construct. As always, feel free to email MISO's Resource Adequacy Team at [radequacy@misoenergy.org](mailto:radequacy@misoenergy.org) with any additional questions.

<https://www.misoenergy.org/legal/tariff/>

☐ Registrant accepts the terms and conditions of the MISO Tariff applicable to this resource.

☐ I certify that I have all permits in place to operate this resource. **18**

☐ I certify that I hold all rights necessary to operate this resource.

☐ Locations included in this enrollment will not be used in an EDR enrollment during the same effective date.

*Note: You must accept at least two of the boxes in the acceptance statement to save draft.*

19) **Submit** if renewal is complete. **Save Draft** if you need to finish later or to take advantage of the upload capabilities in the Demand Reduction Capabilities Forecast screen before submitting.

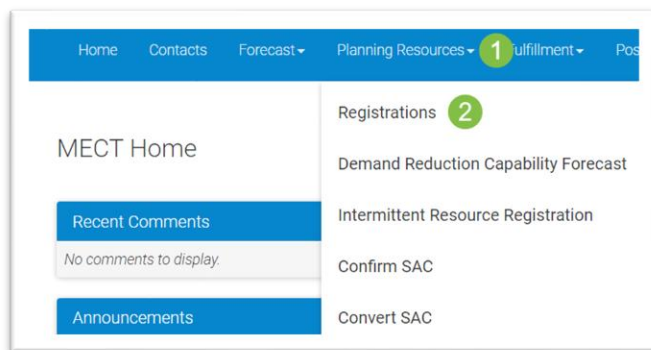
SAVE DRAFT

SUBMIT

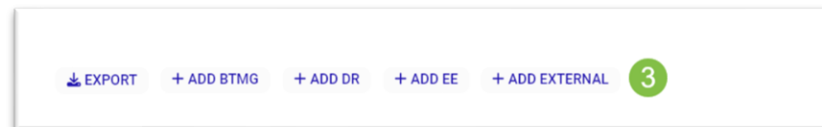
19 CANCEL

## 14.3 HOW TO REGISTER AN EXTERNAL RESOURCE

- 1) Navigate to Planning Resources in the header menu.
- 2) Select **Registrations**.



- 3) Select **Add External**.



- 4) Enter the **Name** of the External Resource.
- 5) Enter **Description**.
- 6) Use drop-down to select **Asset Owner**.
- 7) Use drop-down to select **Load Zone CP Node**.
- 8) Use drop-down to select **Local Balance Authority (LBA)**.
- 9) Check box if this is a **CP Node Override**.
- 10) Check box if Resource is being registered as a **BER/COR**.

General Information		
Name <sup>*</sup> <span>4</span>	Plan Year 2022-2023	Local Balancing Authority (LBA) <span>8</span>
Description <span>5</span>	Asset Owner <span>6</span>	Resource Zone (RZ)
	Load Zone CP Node <span>7</span>	
	Select an Asset Owner first.	
Override <input type="checkbox"/> CP Node Override? <span>9</span>		
BER/COR <input type="checkbox"/> Resource is being registered as a BER/COR? <span>10</span>		

### 11) Add Document.

Documentation
Add Document <span>11</span>

### 12) Add **Transmission Info** for Firm Transmission to the MISO Border.

### 13) Add **Transmission Info** for Firm Transmission within the MISO Transmission System.

TSR and Scheduling Right Reference Numbers
<div>Firm Transmission to the MISO Border</div> <div>Add Transmission Info <span>12</span></div>
<div>Firm Transmission within the MISO Transmission System</div> <div>Add Transmission Info <span>13</span></div>

### 14.) Select **Status Options**.

### 15) Check box to Exclude Season.

### 16) Select **Generator Ownership**.

### 17) Use drop-down to select **Generator**.

### 18) Select **Ownership Share Type**.

### 19) Enter **Entitled Capacity**.

### 20) Add **Generator**.

### 21) Enter **Override** in MW.

### 22) Enter **External Balancing Area** where resource is located.

### 23) Use drop-down to select **Interface CP Node**.

### 24) Use drop-down to select **NERC Regional Entity** where resource is located.

### 25) Check box if this is a **Use-Limited Resource**.

26) Check box if this resource is from a **Diversity Contract**.

27) Use drop-down to select **IDC Names**.

**Seasonal Registration Attributes**

**Summer 2023**

Registration Status: NEW, Not Previously Approved, Updateable

Status Options: ☒ New ☐ Approve (14)

☐ Exclude Summer 2023 (15)

**Generators**

Ownership: ☐ Direct ☐ PPA (16)

Generator: (17) Ownership Share Type: ☒ Megawatt ☐ Percent (18) Entitled Capacity: (19) MW

Add Generator (20)

**Capability**

Capacity at MISO Peak (Calculated):

NRIS	ERIS
MW	MW

External Balancing Area where the Resource are located (22)

Interface CP Node (23)

NERC Regional Entity where the Resource(s) is/are located (24)

Use-Limited Resource Qualified (25): ☐ This resource meet all qualification requirements for a use-limited resource.

Diversity Contract (26): ☐ This resource is from a diversity contract

IDC Names (27):

XEFORMd:

Calculated	Override
MW	MW (21)

28) You will enter information for each season by repeating steps 14-27.

29) Select checkboxes for acceptance.

**Acceptance**

By registering this resource, Registrant understands that MISO's approval of the registration applies to the Resource's ability to participate in MISO's Resource Adequacy Construct based on information accompanying the registration. An "approval" by MISO does not, however, alter the performance expectations stated in MISO's tariff nor does it approve or accept any operating restrictions that this Resource may have pursuant to any practice, rule, regulation, tariff or contract. In the event Emergency conditions warrant deployment of this Resource, performance evaluation will be based solely on the expectations and criteria set forth in the terms and conditions in MISO's tariff. Any conditions, outside those listed in MISO's tariff, will not be considered in the Resource's performance evaluation and as such, should be considered as a risk of participation for the Asset Owner.

Please review MISO's Tariffs and Business Practices Manuals, which are located on the website below, prior to committing the resource to the Resource Adequacy Construct. As always, feel free to email MISO's Resource Adequacy Team at [radequacy@misoenergy.org](mailto:radequacy@misoenergy.org) with any additional questions.

<https://www.misoenergy.org/legal/tariff/>

☐ Registrant accepts the terms and conditions of the MISO Tariff applicable to this resource. (29)

☐ I hereby certify that the host BA has been notified of this commitment.

☐ I hereby certify that this external resource will be used as a capacity resource exclusively for MISO.

☐ I hereby certify that this external resource will be available for the entire auction.

☐ I hereby certify that all other requirements have been met.

30) Enter **Operator Contact Name**.

31) Enter **Operator Contact Phone**.

32) Enter **Operator Contact Email**.

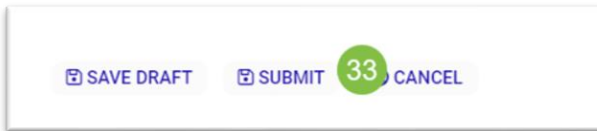
**Operations**

Operator Contact Name (30)

Operator Contact Phone (31)

Operator Contact Email (32)

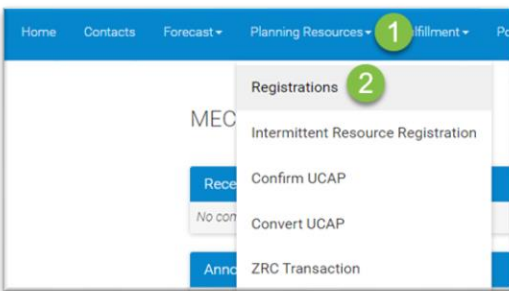
33) **Submit** if registration is complete. **Save Draft** if you need to finish later. **Cancel** to go back to the Registration Screen without making any changes.



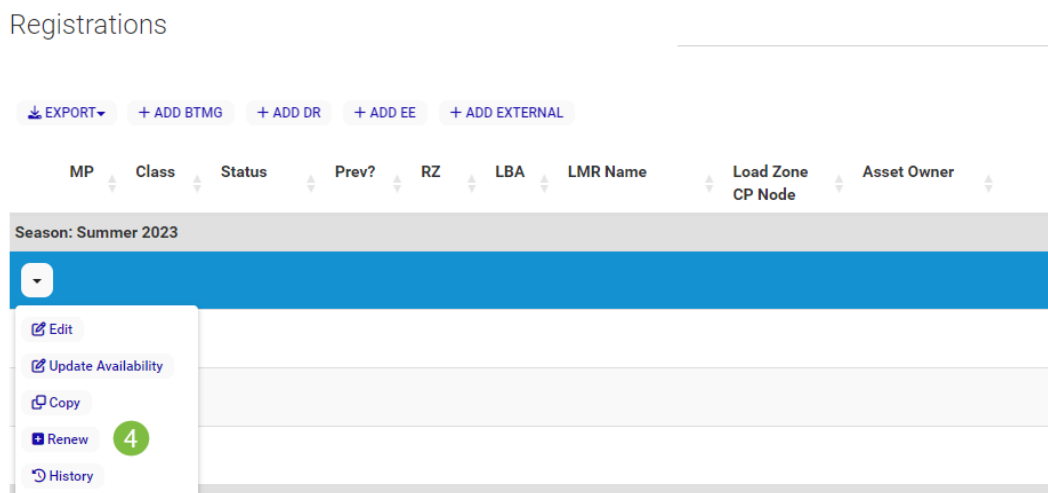
## 14.4 HOW TO RENEW AN EXTERNAL RESOURCE

From the Market Portal homepage, click **Launch MECT View/Submit** from the Module E Capacity Tracking (MECT) box.

- 1) Navigate to **Planning Resources** in the header menu.
- 2) Select **Registrations**.

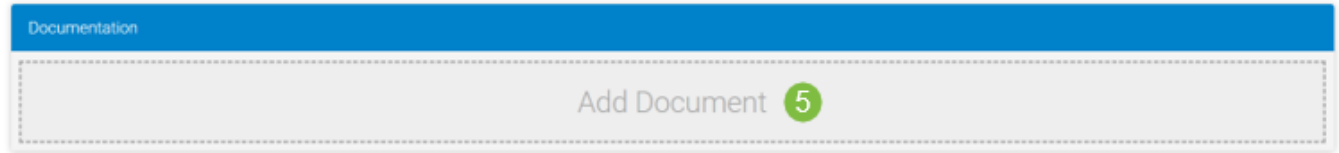


- 3) From the drop-down arrow next to the Planning Year, select the **PRIOR Planning Year**, from the one you are renewing for.
- 4) Under the list of your Registrations, find the External Resource (ER) you would like to renew. Click the **down arrow** by its name. The drop-down will appear, select **Renew**.



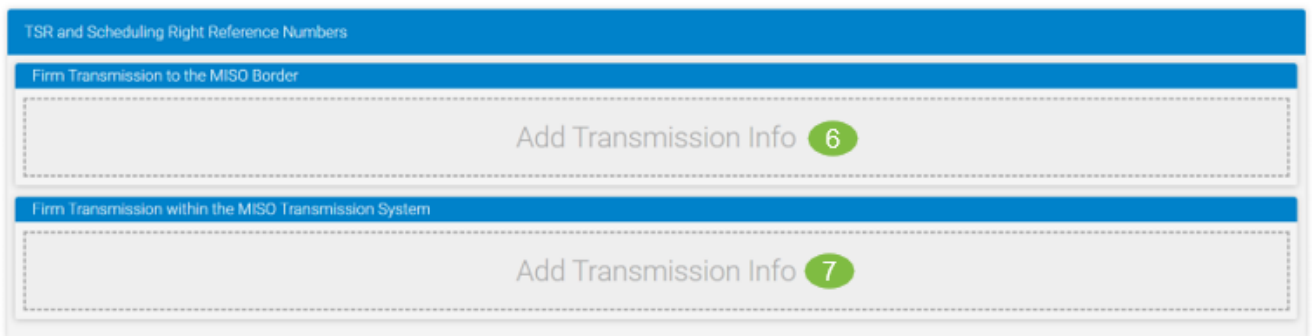
*Note: Basic information from when you registered asset will carry over, but you will need to do the following:*

5) Add **Document**.



6) Add **Transmission Info** for Firm Transmission to the MISO Border.

7) Add **Transmission Info** for Firm Transmission within the MISO Transmission System.



8) Select **Status Options**.

9) Check box to Exclude Season.

10) Select **Generator Ownership**.

11) Use drop-down to select **Generator**.

12) Select **Ownership Share Type**.

13) Enter **Entitled Capacity**.

14) Add **Generator**.

15) Enter **Override** in MW.

16) Enter **External Balancing Area** where resource is located.

17) Use drop-down to select **Interface CP Node**.

18) Use drop-down to select **NERC Regional Entity** where resource is located.

19) Check box if this is a **Use-Limited Resource**.

20) Check box if this resource is from a **Diversity Contract**.

21) Use drop-down to select **IDC Names**.

Seasonal Registration Attributes

**Summer 2023**

Registration Status  
NEW, Not Previously Approved, Updateable

Status Options  
☒ New ☐ Approve **8**

☐ Exclude Summer 2023 **9**

**Generators**

Ownership  
☐ Direct ☐ PPA **10**

Generator **11** Ownership Share Type  
☒ Megawatt ☐ Percent **12**

Entitled Capacity **13** MW **13**

Add Generator **14**

**Capability**

Capacity at MISO Peak (Calculated)

NRIS	ERIS
MW	MW

XEFORd

Calculated	Override
MW	MW <b>15</b>

External Balancing Area where the Resource are located **16**

Interface CP Node **17**

NERC Regional Entity where the Resource(s) is/are located **18**

Use-Limited Resource Qualified **19**  
☐ This resource meet all qualification requirements for a use-limited resource.

Diversity Contract **20**  
☐ This resource is from a diversity contract

IDC Names **21**

22) You will enter information for each season by repeating steps 8-21.

23) Select checkboxes for acceptance.

Acceptance

By registering this resource, Registrant understands that MISO's approval of the registration applies to the Resource's ability to participate in MISO's Resource Adequacy Construct based on information accompanying the registration. An "approval" by MISO does not, however, alter the performance expectations stated in MISO's tariff nor does it approve or accept any operating restrictions that this Resource may have pursuant to any practice, rule, regulation, tariff or contract. In the event Emergency conditions warrant deployment of this Resource, performance evaluation will be based solely on the expectations and criteria set forth in the terms and conditions in MISO's tariff. Any conditions, outside those listed in MISO's tariff, will not be considered in the Resource's performance evaluation and as such, should be considered as a risk of participation for the Asset Owner.

Please review MISO's Tariffs and Business Practices Manuals, which are located on the website below, prior to committing the resource to the Resource Adequacy Construct. As always, feel free to email MISO's Resource Adequacy Team at [radequacy@misoenergy.org](mailto:radequacy@misoenergy.org) with any additional questions.

<https://www.misoenergy.org/legal/tariff/>

☐ Registrant accepts the terms and conditions of the MISO Tariff applicable to this resource.

☐ I hereby certify that the host BA has been notified of this commitment. **23**

☐ I hereby certify that this external resource will be used as a capacity resource exclusively for MISO.

☐ I hereby certify that this external resource will be available for the entire auction.

☐ I hereby certify that all other requirements have been met.



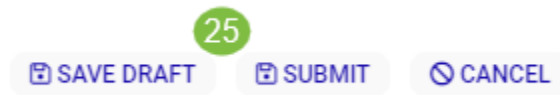
*Note: You must accept at least two of the boxes in the acceptance statement to save draft.*

24) Double check that Operator information is correct.

Operations 24

Operator Contact Name	Operator Contact Phone	Operator Contact Email

25) **Submit** if renewal is complete. **Save Draft** if you need to finish later.

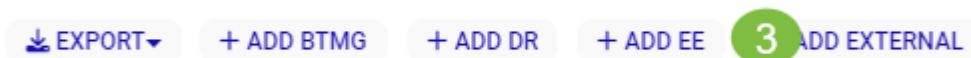


## 14.5 HOW TO REGISTER AN ENERGY EFFICIENCY

- 1) Navigate to **Planning Resources** in the header menu.
- 2) Select **Registrations**.



3) Select **Add EE**.



- 4) Enter the **Name of the EE**.
- 5) Use the dropdown to select **Asset Owner**.
- 6) Use the dropdown to select **Local Balance Authority (LBA)**.
- 7) Enter **Description**.
- 8) Check box if Resource is Retail Choice.

**General Information**

Registration Status  
NEW, Not Previously Approved, Updateable

Auction  
2019-2020

Local Balancing Authority (LBA) **6**

Name \* **4**

Asset Owner **5**

Resource Zone (RZ)

Description **7**

Retail Choice  
☐ Resource is Retail Choice? **8**

9) Add Document.

**Documentation**

Add Document **9**

10) Select **Status Option**.

11) Click checkbox to **Exclude** from season.

12) Use drop-down to select **Program Inception Auction**.

13) Enter **Program Name**.

**Seasonal Registration Attributes**

**Summer 2023**

Registration Status  
NEW, Not Previously Approved, Updateable

Status Options **11**  
☒ New ☐ Approve **10**
☐ Exclude Summer 2023

**Program Information**

Energy Efficiency program capability added during any auction may be registered as a demand reduction resource in that auction and in the next three auctions. Subsequently, that auction's capability must be included as part of the coincident-peak demand forecast. In order for MISO to accurately track the history of a program, **each program should have a registration \*Added\* only once.**

In subsequent auctions, use the Renew action on the current auction registration, which will bring forward the existing information and maintain continuity.

*This program **has not** been registered as a demand reduction resource before.*

Program Inception Auction **12**

Program Name **13**

14) Enter **Energy Efficiency Capability at Peak** in MW.

**Capability**

Energy Efficiency  
Capability at MISO  
Peak

0 MW **14**

15) You will enter information for each season by repeating steps 11-14.

16) Check acceptance statement boxes.



Acceptance

By registering this resource, Registrant understands that MISO's approval of the registration applies to the Resource's ability to participate in MISO's Resource Adequacy Construct based on information accompanying the registration. An "approval" by MISO does not, however, alter the performance expectations stated in MISO's tariff nor does it approve or accept any operating restrictions that this Resource may have pursuant to any practice, rule, regulation, tariff or contract. In the event Emergency conditions warrant deployment of this Resource, performance evaluation will be based solely on the expectations and criteria set forth in the terms and conditions in MISO's tariff. Any conditions, outside those listed in MISO's tariff, will not be considered in the Resource's performance evaluation and as such, should be considered as a risk of participation for the Asset Owner.

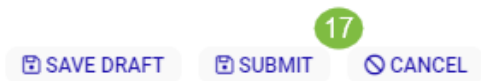
Please review MISO's Tariffs and Business Practices Manuals, which are located on the website below, prior to committing the resource to the Resource Adequacy Construct. As always, feel free to email MISO's Resource Adequacy Team at [radequacy@misoenergy.org](mailto:radequacy@misoenergy.org) with any additional questions.

<https://www.misoenergy.org/legal/tariff/>

☐ Registrant accepts the terms and conditions of the MISO Tariff applicable to this resource.

☐ By registering the resource, the Registrant certifies that they possess the ownership or contractual rights to register.

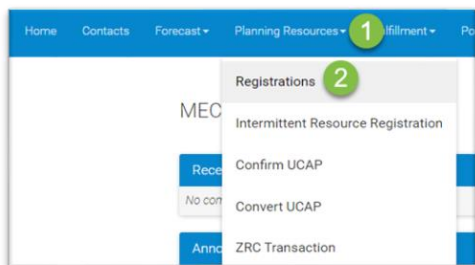
17) **Submit** if registration is complete. **Save Draft** if you need to finish later. **Cancel** to go back to the Registration Screen without making any changes.



## 14.6 HOW TO RENEW AN ENERGY EFFICIENCY

From the Market Portal homepage, click **Launch MECT View/Submit** from the Module E Capacity Tracking (MECT) box.

- 1) Navigate to **Planning Resources** in the header menu.
- 2) Select **Registrations**.



3) From the drop-down arrow next to the Planning Year, select the **PRIOR Planning Year**, from the one you are renewing for.

4) Under the list of your Registrations, find the Energy Efficiency you would like to renew. Click the **down arrow** by its name. The drop-down will appear, select **Renew**.

*Note: Basic Information from when you registered asset will carry over, but you will need to do the following:*

5) Add **Document**.

6) Select **Status Option**.

7) Click checkbox to exclude from season.

8) Use drop-down to select **Program Inception Auction**.

9) Enter **Program Name**.

Seasonal Registration Attributes

**Summer 2023**

Registration Status  
NEW, Not Previously Approved, Updateable

Status Options 7

☒ New ☐ Approve 6

☐ Exclude Summer 2023

Program Information

Energy Efficiency program capability added during any auction may be registered as a demand reduction resource in that auction and in the next three auctions. Subsequently, that auction's capability must be included as part of the coincident-peak demand forecast. In order for MISO to accurately track the history of a program, **each program should have a registration \*Added\* only once.**

In subsequent auctions, use the Renew action on the current auction registration, which will bring forward the existing information and maintain continuity.

*This program **has not** been registered as a demand reduction resource before.*

Program Inception Auction 8 Program Name 9

10) Enter **Energy Efficiency Capability at Peak** in MW.

Capability

Energy Efficiency  
Capability at MISO  
Peak

0 MW 10

11) You will enter information for each season by repeating steps 5-10.

12) Check acceptance statement boxes.

Acceptance

By registering this resource, Registrant understands that MISO's approval of the registration applies to the Resource's ability to participate in MISO's Resource Adequacy Construct based on information accompanying the registration. An "approval" by MISO does not, however, alter the performance expectations stated in MISO's tariff nor does it approve or accept any operating restrictions that this Resource may have pursuant to any practice, rule, regulation, tariff or contract. In the event Emergency conditions warrant deployment of this Resource, performance evaluation will be based solely on the expectations and criteria set forth in the terms and conditions in MISO's tariff. Any conditions, outside those listed in MISO's tariff, will not be considered in the Resource's performance evaluation and as such, should be considered as a risk of participation for the Asset Owner.

Please review MISO's Tariffs and Business Practices Manuals, which are located on the website below, prior to committing the resource to the Resource Adequacy Construct. As always, feel free to email MISO's Resource Adequacy Team at [radequacy@misoenergy.org](mailto:radequacy@misoenergy.org) with any additional questions.

<https://www.misoenergy.org/legal/tariff/>

☐ Registrant accepts the terms and conditions of the MISO Tariff applicable to this resource. 12

☐ By registering the resource, the Registrant certifies that they possess the ownership or contractual rights to register.

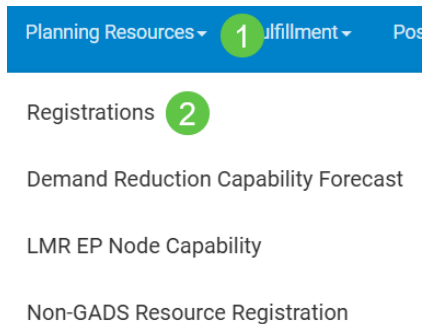
*Note: You must accept both boxes in the acceptance statement to save draft.*

13) **Submit** if renewal is complete. **Save Draft** if you need to finish later.

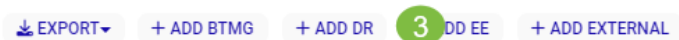
13

## 14.7 HOW TO REGISTER A DEMAND RESPONSE RESOURCE (DRR)

- 1) Navigate to **Planning Resources** in the header menu.
- 2) Select **Registrations**.



- 3) Select **Add DR**.



- 4) Enter the Name of the **DR**.
- 5) Use the drop-down to select **Asset Owner**.
- 6) Use the drop-down to select **Local Balance Authority (LBA)**.  
Resource Zone will auto-populate based on the LBA/Asset Owner selection.
- 7) Enter **Description**.
- 8) Use drop-down to select **Load Zone CP Node**.
- 9) Check box to override **CP Node**.
- 10) Check box if resource is being registered by an **Aggregated Retail Customer (ARC)**.
- 11) Check box if **Resource is Retail Choice**.
- 12) Add **ARC Details**.
- 13) Upload **ARC Details**.

**General Information**

Name \* 4 Plan Year 2022-2023 Local Balancing Authority (LBA) 6

Description 7 Asset Owner 5 Resource Zone (RZ)

Load Zone CP Node 8

Select an Asset Owner first.

Override 9

☐ CP Node Override?

Aggregated Retail Customer 10 Retail Choice 11

☐ Resource is being registered by an Aggregated Retail Customer (ARC)? ☐ Resource is Retail Choice?

Add ARC Details 12 Upload ARC Details 13

14) Use drop-down to select **Accreditation Method**.

15) Add **Document**. Please reference BPM-11, Section 4.2.9 for more information.

**Supporting Documentation**

Accreditation Method 14

Add Document 15

16) Enter **Demand Reduction Capability Forecast** manually here or save draft and take advantage of the bulk-upload capability in the Demand Reduction Capability Forecast screen for all resources at once after all resources are drafted, prior to submitting.

**Demand Reduction Capability Forecast** 16

Enter the amount of MW you can curtail in a given month consistent with the actual physical availability of the resource, limited by any relevant regulatory or contractual restrictions. These values should not include Firm Service levels (if applicable). Year one values will be used as the default for the given months in the MISO Communication System (MCS).

Plan Year 1

June	July	August	September	October	November
MW	MW	MW	MW	MW	MW
December	January	February	March	April	May
MW	MW	MW	MW	MW	MW

Plan Year 2

June	July	August	September	October	November
MW	MW	MW	MW	MW	MW
December	January	February	March	April	May
MW	MW	MW	MW	MW	MW

<b>Plan Year 3</b> Summer _____ MW Winter _____ MW	<b>Plan Year 4</b> Summer _____ MW Winter _____ MW	<b>Plan Year 5</b> Summer _____ MW Winter _____ MW	<b>Plan Year 6</b> Summer _____ MW Winter _____ MW
<b>Plan Year 7</b> Summer _____ MW Winter _____ MW	<b>Plan Year 8</b> Summer _____ MW Winter _____ MW	<b>Plan Year 9</b> Summer _____ MW Winter _____ MW	<b>Plan Year 10</b> Summer _____ MW Winter _____ MW

17) Enter **Operator Contact Name**.

18) Enter **Operator Contact Phone**.

19) Enter **Operator Contact Email**.

Operator Contact Information		
Operator Contact Name _____ 17	Operator Contact Phone _____ 18	Operator Contact Email _____ 19

20) Use drop-down to select **Measurement and Verification** applied to DR.

Measurement and Verification
M&V Protocol to be applied to this DR _____ 20

21) Select **Status Option**.

22) Check the box if asset is to be excluded from season.

23) Enter **Capability at MISO Peak** in MWs.

24) Check box if asset is an **Emergency Demand Response Resource**.

25) Enter **Max Interruptions**.

26) Check box if asset is registered as a **DRR**.

27) Select **Load Control Method**.

28) Select drop-down for **Max duration** (hours).

29) Select if the LMR performed a test and submitted data via the accreditation section of the registration.

30) Enter **Opt Out Reason** if applicable.



Seasonal Registration Attributes

**Summer 2023**

Registration Status

Status Options

☒ Awaiting Review

☐ Exclude Summer 2023

Capability

Capability at MISO Peak

MW

DRR Registered

☐ Registered as DRR?

Did this LMR perform a test and submit data via the accreditation section of the registration?

☐ Opt In ☒ Opt Out

Emergency Demand Response Resource

☐ EDR?

Load Control Method

☐ Direct ☒ Interruptible

Opt Out Reason

Max Interruptions

Max duration (hours)

When waiving obligation, the resource will be subject to a 3x penalty for not following scheduling instructions and will be required to participate in annual training.

- 31) Use the drop-down to select **Monthly Availability**.
- 32) Use the drop-down to select **Notification Time**.
- 33) You can specify time by entering the **From (EST), To(EST), Days, Hours, Minutes** and **Description**.

Monthly Availability

Monthly Availability

Greater than or equal to 9 Months

Notification

Notification Time

Greater than 6 hours and Less than or equal to 12 hours

From (EST) To (EST) Days Hours Minutes Description

0000 2400 Everyday 0 0

- 34) You will enter information for each season by repeating steps 21-33.
- 35) Select checkboxes for acceptance.

Acceptance

By registering this resource, Registrant understands that MISO's approval of the registration applies to the Resource's ability to participate in MISO's Resource Adequacy Construct based on information accompanying the registration. An "approval" by MISO does not, however, alter the performance expectations stated in MISO's tariff nor does it approve or accept any operating restrictions that this Resource may have pursuant to any practice, rule, regulation, tariff or contract. In the event Emergency conditions warrant deployment of this Resource, performance evaluation will be based solely on the expectations and criteria set forth in the terms and conditions in MISO's tariff. Any conditions, outside those listed in MISO's tariff, will not be considered in the Resource's performance evaluation and as such, should be considered as a risk of participation for the Asset Owner.

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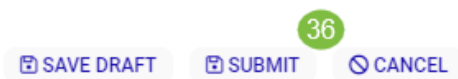
<https://www.misoenergy.org/legal/tariff/>

☒ Registrant accepts the terms and conditions of the MISO Tariff applicable to this resource.

☒ I certify that I have all permits in place to operate this resource.

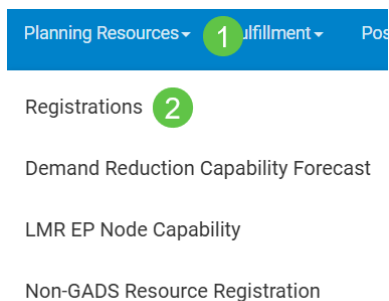
☒ I certify that I hold all rights necessary to operate this resource.

36) **Submit** if registration is complete. **Save Draft** if you need to finish later. **Cancel** to go back to the Registration Screen without making any changes.



## 14.8 HOW TO RENEW A DEMAND RESPONSE RESOURCE (DRR)

- 1) Navigate to **Planning Resources** in the header menu.
- 2) Select **Registrations**.



- 3) From the drop-down arrow next to the Planning Year, select the **PRIOR Planning Year**, from the one you are renewing for.



- 4) Under the list of your Registrations, find the Demand Response Resource (DR) you would like to renew. Click the **down arrow** by its name. The drop-down will appear, select **Renew**.

Season: Summer 2023

- Edit
- Update Availability
- Copy
- Renew 4
- History

*Note: Basic Information from when you registered asset will carry over, but you will need to do the following:*

5) Use drop-down to select **Accreditation Method**.

6) Add **Documentation**. (This can be waivers, retail contracts and all other information required for registration) For more information refer to Attachment TT of the Tariff, BPM-026 Demand Response. BPM 11 – 4.2.7.8 Demand Resource – Testing Requirements

Supporting Documentation

Accreditation Method 5

Add Document 6

7) Double check that all the values are updated for the current registration. One-off updates can be made here or via the bulk-upload capability in the Demand Reduction Capability Forecast screen.

Demand Reduction Capability Forecast 7

Enter the amount of MW you can inject in a given month consistent with the actual physical availability of the resource, limited by any relevant regulatory or contractual restrictions. These values should not include transmission losses. Year one values will be used as the default for the given months in the MISO Communication System (MCS).

Plan Year 1					
June	July	August	September	October	November
MW	MW	MW	MW	MW	MW
December	January	February	March	April	May
MW	MW	MW	MW	MW	MW

Plan Year 2					
June	July	August	September	October	November
MW	MW	MW	MW	MW	MW
December	January	February	March	April	May
MW	MW	MW	MW	MW	MW

Plan Year 3 Summer _____ MW Winter _____ MW	Plan Year 4 Summer _____ MW Winter _____ MW	Plan Year 5 Summer _____ MW Winter _____ MW	Plan Year 6 Summer _____ MW Winter _____ MW
Plan Year 7 Summer _____ MW Winter _____ MW	Plan Year 8 Summer _____ MW Winter _____ MW	Plan Year 9 Summer _____ MW Winter _____ MW	Plan Year 10 Summer _____ MW Winter _____ MW

8) Double check that Operator information is correct.

Operations 8

Operator Contact Name	Operator Contact Phone	Operator Contact Email
<input type="text"/>	<input type="text"/>	<input type="text"/>

9) Use drop-down to select **Measurement and Verification** applied to DR.

Measurement and Verification

What type of measurement protocol will be applied to this BTMG to measure response when called on during an EEA level 2 or higher event?

9

- 10) Check the box if asset is excluded from season.
- 11) Enter **Capability at MISO Peak** in MWs.
- 12) Check box if asset is an **Emergency Demand Response Resource**.
- 13) Enter **Max Interruptions**.
- 14) Check box if asset is registered as a DRR.
- 15) Select **Load Control Method**.
- 16) Select drop-down for **Max duration (hours)**.
- 17) Select if the LMR performed a test and submitted data via the accreditation section of the registration.
- 18) Enter **Opt Out Reason** if applicable.

Seasonal Registration Attributes

**Summer 2023**

Registration Status

Status Options 10 ☐ Exclude Summer 2023

☒ Awaiting Review

**Capability**

Capability at MISO Peak 11 MW

Emergency Demand Response Resource 12 ☐ EDR?

Load Control Method 15 ☐ Direct ☒ Interruptible

Max Interruptions 13

Max duration (hours) 16

DRR Registered 14 ☐ Registered as DRR?

Did this LMR perform a test and submit data via the accreditation section of the registration? 17 ☐ Opt In ☒ Opt Out

Opt Out Reason 18

When waiving obligation, the resource will be subject to a 3x penalty for not following scheduling instructions and will be required to participate in annual training.

19) Use drop-down to select **Monthly Availability**.

20) Use drop-down to select **Notification Time**.

21) You can specify time by entering the **From(EST)**, **To(EST)**, **Days**, **Hours**, **Minutes** and **Description**.

**Monthly Availability**

Monthly Availability 19 Greater than or equal to 9 Months

**Notification**

Notification Time 20 Greater than 6 hours and Less than or equal to 12 hours

From (EST)	To (EST)	Days	Hours	Minutes	Description
0000	2400	Everyday	0	0	<span>21</span>

22) You will enter information for each season by repeating steps 10-21.

23) Select checkboxes for acceptance.

Acceptance

By registering this resource, Registrant understands that MISO's approval of the registration applies to the Resource's ability to participate in MISO's Resource Adequacy Construct based on information accompanying the registration. An "approval" by MISO does not, however, alter the performance expectations stated in MISO's tariff nor does it approve or accept any operating restrictions that this Resource may have pursuant to any practice, rule, regulation, tariff or contract. In the event Emergency conditions warrant deployment of this Resource, performance evaluation will be based solely on the expectations and criteria set forth in the terms and conditions in MISO's tariff. Any conditions, outside those listed in MISO's tariff, will not be considered in the Resource's performance evaluation and as such, should be considered as a risk of participation for the Asset Owner.

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<https://www.misoenergy.org/legal/tariff/>

☐ Registrant accepts the terms and conditions of the MISO Tariff applicable to this resource.
 ☐ I certify that I have all permits in place to operate this resource.
 ☐ I certify that I hold all rights necessary to operate this resource.

**Note:** You must accept at least two of the boxes in the acceptance statement to save draft.

24) **Submit** if renewal is complete. **Save Draft** if you need to finish later.

24

SAVE DRAFT

SUBMIT

CANCEL

## 15. LMR EP NODE CAPABILITY

### Access and BPM Reference

Responsibility	Planning Resource Owner
User Role Requirement	Operator-Submit, Operator-View

### Description

MISO will update LMR Availability in the DSRI once a month with the monthly availability submitted for the LMR at the time of registration as the default values. MPs should always update these values to ensure the availability is accurate as Scheduling Instructions will be based on the LMR Availability in the DSRI. Immediate availability updates should be made directly in the DSRI, but if MPs need to update availability for future months, it can be done in MECT.

The update availability screen is available once the resource has been approved and is only available for BTMGs and Demand Response Resources.

- 1) Navigate to **Planning Resources** in the header menu.
- 2) Select **LMR EP Node Capability**.

Registrations

Demand Reduction Capability Forecast

LMR EP Node Capability 2

Non-GADS Resource Registration

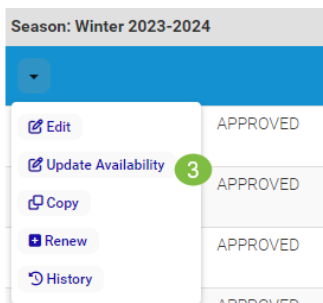
Confirm SAC

Convert SAC

ZRC Transaction

Schedule 53 SAC

3) Click down arrow next to asset and select **Update Availability**.



4) Enter **Availability**.

5) Click **Update** to save or **Cancel** to go back without making changes.

CANCEL UPDATE 5

**Monthly Availability**

*Demand Reduction Capability Forecast*

Enter the amount of MW you can inject in a given month consistent with the actual physical availability of the resource, limited by any relevant regulatory or contractual restrictions. These values should not include transmission losses. Year one values will be used as the default for the given months in the MISO Communication System (MCS).

Plan Year 1 4

June	July	August	September	October	November
1.4 MW	1.4 MW	1.4 MW	1.4 MW	1.4 MW	1.4 MW
December	January	February	March	April	May
1.4 MW	1.4 MW	1.4 MW	1.4 MW	1.4 MW	1.4 MW

## 16. NON-GADS RESOURCE REGISTRATION

### Access and BPM Reference

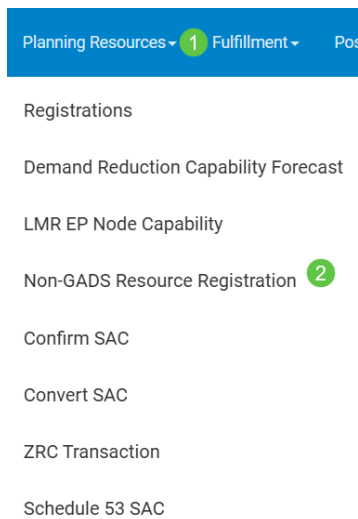
Responsibility	Planning Resource Owner
User Role Requirement	Operator-Submit, Operator-View

### Description

The Intermittent Resource Registration screen allows Market Participants to submit the required data included in the Intermittent Data Template into MECT. MPs will have the option of creating a new intermittent resource or renewing an existing one from a previous season.

### 16.1 HOW TO REGISTER A NON-GADS RESOURCE

- 1) Click **Planning Resources** from the header menu.
- 2) Select **Non-GADS Resource Registration**.



- 3) Use drop-down to select **Season**.
- 4) Click **New**.



## Non-GADS Resource Registration

06/2025 - 3

05/2026

[EXPORT](#) [Filter](#) [Reset](#) [+ NEW](#) 4

Search

NERC ID	Generator Name	Generator Type	Fuel Type	Nameplate Capacity	Supporting Data	GVTC	SAC	Status	Hybrid/Co-Located
No data available in table									

Showing 0 to 0 of 0 entries

Show 15 entries

[Previous](#) [Next](#)

5) Attach Documentation for Reporting Data. The document import process may take a few seconds. It will autofill the Generator Name, Nameplate Capacity, Fuel Type and GVTC fields for you.

6) Check box if Hybrid/Co-Located.

7) Use drop-down to select **Generator Type**.

8) Enter **SAC** MW per Season.

9) Click **Submit** to save or **Cancel** to go back without making changes.

### Non-GADS Resource Registration

[SUBMIT](#) [CANCEL](#)
9

Supporting Data

Documentation
5
[-](#)

Browse file...

General Info

Generator Name
☐ Hybrid/Co-Located? 6

Generator Type7

Fuel Type

Nameplate Capacity

MW

SAC

Summer 2025MW

Fall 2025MW

Winter 2025-2026MW

Spring 2026MW

GVTC

Summer 2025MW

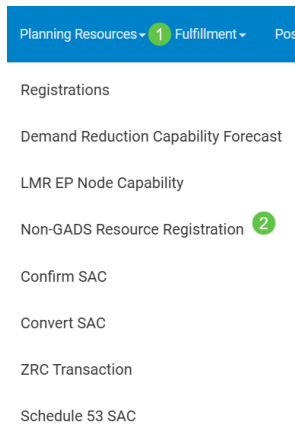
Fall 2025MW

Winter 2025-2026MW

Spring 2026MW

## 16.2 HOW TO RENEW A NON-GADS RESOURCE

- 1) Click **Planning Resources** from the header menu.
- 2) Select **Non-GADS Resource Registration**.



- 3) Use drop-down arrow on the asset you want to renew and click **Renew**.

### Non-GADS Resource Registration

EXPORT ▼ ▼ HISTORY + NEW

NERC ID	Generator Name	Generator Type	Fuel Type
Season: Summer 2023			
NSPP	ADS - Albany	BTMG	Solar
	- Annandale	BTMG	Solar
	- Atwater	BTMG	Solar

Edit  
 Renew  
 Unconfirm

- 4) Check that all General Info is accurate.
- 5) Enter **GVTC MW** for each season.
- 6) Click **Submit**.

Intermittent Resource Registration

Renew performed.

6

SUBMIT

CANCEL

General Info

Generator Name

4

Nameplate Capacity

0

MW

Generator Type

Behind The Meter Generation

Fuel Type

Solar

Supporting Data

Browse file...

GVTC

Summer 2023

MW

Fall 2023

MW

5

Winter 2023-2024

MW

Spring 2024

MW

17. CONFIRM SAC

Access and BPM Reference

Responsibility	Planning Resource Owner
User Role Requirement	Operator – Submit, Operator – view
BPM 11 Resource Adequacy	5.5.3 Conduct of the PRA

Description

The Confirm SAC screen allows MPs to view the calculated Seasonal Accredited Capacity (SAC) values, along with other relevant information including ICAP, GVTC, NRIS, ERIS and XEFORDs for each registered resource.

1) Navigate to **Planning Resources** in the header menu. .

2) Select **Confirm SAC**.

58 | Page

Registrations

Demand Reduction Capability Forecast

LMR EP Node Capability

Non-GADS Resource Registration

Confirm SAC 2

Convert SAC

ZRC Transaction

Schedule 53 SAC

3) Select **Season** from the drop-down menu.

4) Click the **Confirm SAC** box.

5) Click **Submit**.

Confirm SAC

3

EXPORT SUBMIT FIRM TRANSMISSION (5) RECORDS CONFIRM / REJECT / LOCK RECORDS RESET INTERMITTENT DELIVERABILITY VIEW FORCED OUTAGE RATE ADJUSTMENTS

Search

Resource Name	Is Schedule 53?	RZ	Asset Owner	Type	Effective ICAP	GVTC	Total IS	NRIS	ERIS	XEFO	Inter %	TL% Inc	SAC (Max)	SAC (NRIS)	SAC (ERIS)	Conf. ERIS	Conv. SAC	Is Prov?	Firm Trans.	Confirm SAC	Reject SAC	Lock
					26.4	0.0	29.0	29.0	0.0	0.0		2.4	29.0	29.0	0.0	0.0	29.0	N	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					200.0	200.0	200.0	0.0	200.0	0.0	0.17200	NA	34.4	0.0	34.4	34.4	34.4	N	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 18. CONVERT SAC

### Access and BPM Reference

Responsibility	Planning Resource Owner
User Role Requirement	Operator – Submit, Operator – view
BPM 11 Resource Adequacy	4.3 Confirmation & Conversion of SAC MW

### Description

The Convert SAC page is used by MPs to convert all or a portion of the confirmed SAC MW to Zonal Resource Credits (ZRCs). Must Offer Compliance apply to all Capacity Resources that have converted to ZRCs. SAC MW associated with ERIS requires the evidence of deliverability by submitting the transmission reservation information.

The first step to convert SAC to ZRCs is to make sure the resource is confirmed in the Confirm SAC screen. All resources with Confirmed SAC will be displayed in either the Total NRIS SAC or Total ERIS SAC fields. The Convert fields will initially display the default value of zero. MPs can

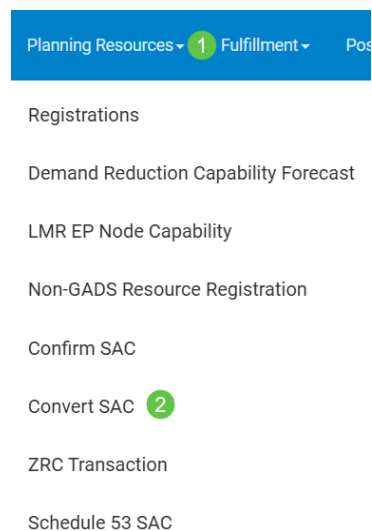
enter the ZRC amount (s) in the Convert fields if the entered value does not exceed the value of available SAC. System decrements or increments the available SAC amount entering the Conv SAC field.

Resources with Energy Resource Interconnection Service (ERIS) are required to submit the OASIS transmission reservation's sink to match the LRZ of the ERIS SAC, if the reservation amount covers the amount of the ZRC.

Multiple TSRs may be linked together to cover the entire Planning Year. Multiple TSRs may also be stacked on top of each other to increase the MW amount for the entire Planning Year.

The ZRC Balance field will display the resource's ZRC available for use. If the ZRC was used for the purpose of FRAP, ZRC transaction (sale), or auction, the ZRC Balance will be decremented accordingly.

- 1) Navigate to **Planning Resources** from menu header.
- 2) Select **Convert SAC**.



- 3) Select **Season** from the drop-down menu.
- 4) Edit the **Conv NRIS(SAC)** or **CONV ERIS (SAC)** field, depending upon which asset you wish to convert.

## 5) Click **Submit**.

Convert SAC

2022-2023 **3**

**4**

EXPORT HISTORY VIEW FSRL/EXCLUSIONS

Search

Resource Name	Is Schedule 53?	RZ	Asset Owner	Type	SAC Status	Total NRIS SAC	Conv. NRIS (SAC)	Avail. NRIS SAC	Total ERIS SAC	Conv. ERIS (SAC)	TSR Status	Avail. ERIS SAC	ZRC Balance	Effective Date	Comment for Partially Converted NRIS
			BTMG	Confirmed		0.0	0.0	0.0	7.5	7.5		0.0	0.0	06/01/2022	
			BTMG	Confirmed		0.0	0.0	0.0	47.8	47.8		0.0	0.0	06/01/2022	
			BTMG	Confirmed		0.0	0.0	0.0	6.6	6.6		0.0	0.0	06/01/2022	
			DR	Confirmed		79.4	79.4	0.0	0.0			0.0	0.0	06/01/2022	

## 19. ZRC TRANSACTIONS

### Access and BPM Reference

Responsibility	Planning Resource Owner
User Role Requirement	Operator – Submit, Operator – view
BPM 11 Resource Adequacy	4.4 ZRC Transactions

### Description

The ZRC Transactions screen allows Market Participants to either view or assign Zonal Resource Credit balances for the purpose of transaction with other MPs. The screen will also allow Sellers to set up the sale of available ZRCs and the Buyer designated by the Seller to either accept or reject the ZRC Transaction.

Note: Until the Buyer either accepts or rejects the ZRC transaction, the Seller cannot use the ZRCs from the designated Planning Resource for another use.

New ZRC transactions can only be set up by the owner of the ZRCs.

### 19.1 CREATING A ZRC TRANSACTION

- 1) Navigate to **Planning Resources** from the menu header.
- 2) Select **ZRC Transaction**.

Registrations

Demand Reduction Capability Forecast

LMR EP Node Capability

Non-GADS Resource Registration

Confirm SAC

Convert SAC

ZRC Transaction 2

Schedule 53 SAC

3) Select correct **Planning Year**.

4) Click **New Transaction**.

## ZRC Transactions

Summer 2023 3 ▾

EXPORT ▾ + NEW TRANSACTION 4

Search

Contract Name	Seller NERC ID	Seller Status	Buyer NERC ID	Buyer Status	RZ	Planning Resource	Effective Date	Amount (ZRC)	Contract Status	Seller Approved For Delete	Buyer Approved For Delete
Loading...											
										Previous	Next

5) Enter **Contract Name**.

6) Enter **Amount of ZRC**.

7) Use drop-down to select **Buyer NERC ID**.

8) Use drop-down to select **RZ**.

9) Use drop-down to select **Planning Resource**.

10) Click **Submit** to save or **Cancel** to go back without making changes.

Create new entry ×

Contract Name 5

Amount 6 ZRC

Seller NERC ID  
IPLM

RZ 8 ▾

Buyer NERC ID 7 ▾

Planning Resource 9 ▾

CANCEL

+ SUBMIT 10

## 20. SCHEDULE 53 (SAC)

### Access and BPM Reference

Responsibility	Planning Resource Owner
User Role Requirement	Operator – Submit, Operator – view
BPM 11 Resource Adequacy	

### Description

The Schedule 53/SAC screen only displays Schedule 53 resources. This screen gives access to Annual/Seasonal Tier 2 RA Hours. You can drill down to find more detailed information about each season. It also provides RATIO UCAP/ISAC values.

Schedule 53 SAC

EXPORT HISTORY ANNUAL/SEASONAL TIER 2 RA HOURS RATIO UCAP/ISAC SAC DATA INTEGRATION

LOCK SELECTED UPLOAD UCAP/ISAC RATIO UPDATES

Search

Name	RZ	Asset Owner	ICAP	GVTC	ISAC	SAC	LOLE UCAP	Class Average Unit	Lock Status	Lock	Integration Date	Include in Ratio
------	----	-------------	------	------	------	-----	-----------	--------------------	-------------	------	------------------	------------------

## 21. PLANNING RESERVE MARGIN REQUIREMENT CALCULATION (PRMR)

### Access and BPM Reference

Responsibility	Market Participant
User Role Requirement	Operator – Submit, Operator – view
BPM 11 Resource Adequacy	2.1 Planning Reserve Requirement Overview

### Description

The PRMR Calculation screen is used by the Market Participant to view their current PRMR obligations by Asset Owner, Local Resource Zone (LRZ), and Local Balancing Authority (LBA). The data is updated whenever components to the PRMR formula are updated. All the components of the PRMR calculation are provided such that the Market Participant can recalculate the PRMR manually should they wish to do so.

### 21.1 PRMR CALCULATIONS

- 1) Navigate to **Fulfillment** in the menu header.
- 2) Select **PRMR Calculation**.



Fulfillment ▾ 1 Post Auction Activities

PRMR Calculation 2

FRAP + RBDC Opt Out

Hedge Registration

Net Position/Deficit Dashboard

Submit Offer

3) Select **Season** from the drop-down menu.

PRMR Calculations ▾ Summer 2026 3 ▾

EXPORT ▾ ▾ ▾ Search

NERC ID	RZ	LBA	Asset Owner	Demand Forecast	Effective PRM %	RBDC Opt Out Status	RBDC Opt Out %	FRS	FRP	Transmission Loss %	Initial PRMR	Final PRMR	Retail Choice
No data available in table													

## 22. FIXED RESOURCE ADEQUACY PLAN (FRAP) & RBDC OPT OUT

### Access and BPM Reference

Responsibility	Load Serving Entity
User Role Requirement	Operator – Submit, Operator – view
BPM 11 Resource Adequacy	5.3.1 Fixed Resource Adequacy Plan (FRAP)

### Description

The FRAP screen allows Asset Owners to designate specific Planning Resources to meet their PRMR. This may be done using an Asset Owner's Planning Resources PRMR. This may be done using Asset Owner's Planning Resources or other Planning Resources obtained through ZRC transactions.

### 22.1 DESIGNATE AN UNDESIGNATED PLANNING RESOURCE TO A PRMR

To designate planning resources to a PRMR first click the Resources button in the desired LRZ row. This will bring up a pop-up screen that will display all the planning resources for which the

Market Participant has ZRCs from. This included both planning resources owned by the Market Participant and those acquired through Zonal Resource Credit transactions. To apply a Planning Resource's ZRC to a FRAP, enter the amount of remaining ZRCs that will be used in the Total Applied ZRC field.

For instance, if 10.0 ZRCs are being designated from the planning resource to the PRMR, enter 10.0 will designate 10.0 ZRCs to the PRMR. However, if 4.0 ZRCs are currently designated to the PRMR, then entering 10.0 will increase the amount to 14.0MW. Conversely to reduce a designation, enter a negative amount.

Fixed RA Plan + RBDC Opt Out

FRAP STATUS ADMINISTRATION

Status  
☒ NOT\_SUBMITTED   ☐ VALID   ☐ NOT\_VALID   Modified By null on null

[EXPORT](#)

Zone	Totals
LCR	0.0
Initial PRMR	0.0
Max Non-Zonal ZRC	0.0
Non-Zonal Applied ZRC	0.0
Zonal Applied ZRC	0.0
Total Applied ZRC	0.0
Ratio Applied ZRC To LCR	0.00000000
Ratio Total Applied ZRC To PRMR	0.00000000

Showing 1 to 8 of 8 entries   Show 15 entries   [Previous](#) [1](#) [Next](#)

## 22.2 VIEW SUMMARY OF PRMR OBLIGATIONS

The Fixed RA Plan screen conveys the total PRMR for each Asset Owner by Local Resource Zone. Additionally, the remaining PRMR that has yet to have planning designated to it.

## 23. HEDGE REGISTRATION

### Access and BPM Reference

Responsibility	Load Serving Entity
User Role Requirement	Operator – Submit, Operator – view
BPM 11 Resource Adequacy	5.4 Hedge and Zonal Delivery Benefit

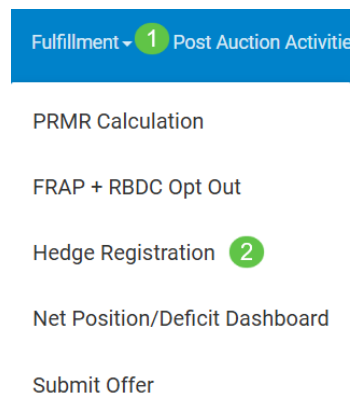
### Description

The Hedge Registration screen allows for the submission of Zonal Deliverability Charge (ZDC) and Historical Unit Considerations (HUC) Hedge Registrations. LSE's can obtain ZDC Hedge as described herein as a financial protection from zonal price differences. Market Participants will be eligible for a hedge against congestion in the auction if the LSE invests in new or upgraded transmission to serve the LSE's load if located in a different LRZ. The participant that funds the upgrades and submits the transmission request is the participant who is eligible for the ZDC Hedge. A HUC is a financial hedge against ACP differentials between LRZs or between an LRZ and an ERZ. HUCs for existing LSEs will be eligible until the end of the original term of the arrangement, not including any evergreen extensions, or for two years -whichever is longer. Users can view saved, submitted, approved, rejected, awaiting review and registrations that have more information requested on this screen as well.

## 23.1 HEDGE REGISTRATION

**Note: Partial owned resources will display in the drop-down menu.**

- 1) Navigate to **Fulfillment** in header menu.
- 2) Select **Hedge Registration**.



- 3) Use the drop-down to select **Season**.
- 4) Click **New**.

Hedge Registration

06/2025 - 05/2026 3

EXPORT ▼ ▼ + NEW 4 RENEW SELECTED

Search

MP	Asset Owner	Resource Zone From	Resource Zone To	Resource Name	Hedge Name	Hedge Type	Status	Amount	Renew
No data available in table									

Showing 0 to 0 of 0 entries

Show 15 entries

Previous Next

- 5) Use drop-down to select **Auction**.
- 6) Enter **HUC Amount in MW**.

- 7) Enter **Hedge Name**. This must be unique across the MP and the Season.
- 8) Use drop-down to select **Hedge Type**.
- 9) Use drop-down to select **HUC Type**.
- 10) Use drop-down to select **GFA Period**.
- 11) Enter **GFA ID#**.
- 12) Enter one of more **TSR or Network #(s)**.
- 13) The Planning Resource field will not be populated with resources until ZRCs have been created from a resource's UCAP.
- 14) Use drop-down to select **Registration Asset Owner**.
- 15) Use drop-down to select **Sink LBA**.
- 16) Use drop-down to select **Source LBA**.
- 17) Enter **Description**.

New Hedge Registration

SAVE DRAFT SUBMIT CANCEL

Hedge Information			
Hedge Registration Status	Auction	HUC Amount	
NEW, Not Previously Approved, Updateable	Summer 2023 <span style="float: right;">5 ▼</span>	6 MW	

General Information			
Hedge Name <span style="float: right;">7</span>	Hedge Type <span style="float: right;">8 ▼</span>	HUC Type <span style="float: right;">9 ▼</span>	
GFA Period <span style="float: right;">10 ▼</span>	GFA ID# <span style="float: right;">11</span>	TSR or Network #(s) <span style="float: right;">12</span>	
Planning Resource <span style="float: right;">13 ▼</span>	Registration Asset Owner <span style="float: right;">14 ▼</span>	Sink LBA <span style="float: right;">15 ▼</span>	Source LBA <span style="float: right;">16 ▼</span>
Description <span style="float: right;">17</span>			

- 18) **Add Document** to upload.
- 19) Enter any **Comments**.
- 20) Check **Acceptance box** to accept terms.

Documentation

+ Add Document 18

Comments Section

Comments 19

Acceptance

☐ I accept the terms and conditions that this registration is not an ever green contract 20

21) **Submit** if registration is complete. **Save Draft** if you need to finish later. **Cancel** to go back to the Registration Screen without making any changes

21

SAVE DRAFT SUBMIT CANCEL

## 23.2 EDITING HEDGE

- 1) Navigate to **Fulfillment** in header menu.
- 2) Select **Hedge Registration**.

Fulfillment 1 Post Auction Activities

PRMR Calculation

FRAP + RBDC Opt Out

Hedge Registration 2

Net Position/Deficit Dashboard

Submit Offer

- 3) Use the drop-down to select **Season**.
- 4) Click **Arrow** next to Hedge you want to edit.

[EXPORT](#)[RENEW SELECTED](#)

Search

MP	Asset Owner	Resource Zone From	Resource Zone To	Resource Name	Hedge Name	Hedge Type	Status	Amount	Renew
Season: Summer 2023									
▼ <span style="background-color: #28a745; color: white; border-radius: 50%; padding: 2px 5px;">4</span>									<input type="checkbox"/>
▼									<input type="checkbox"/>

5) Click **Select**.6) Edit **Hedge**.7) Click **Submit**.
[SAVE DRAFT](#)
[SUBMIT](#) 7
[CANCEL](#)

## 24. NET POSITION/DEFICIT DASHBOARD

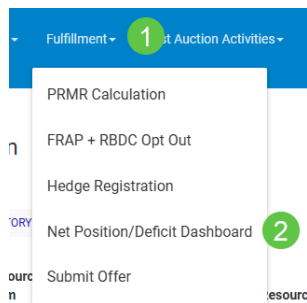
### Access and BPM Reference

Responsibility	Load Serving Entity, Planning Resource Owner
User Role Requirement	Operator – Submit, Operator – View
BPM 11 Resource Adequacy	3. Establishing Planning Reserve Margin Requirement 5.3.1 Fixed Resource Adequacy Plan (FRAP) 2.3 Resource Adequacy Requirements Overview 5.5 Planning Resource Auction (PRA) 4.4 ZRC Transactions 4.3 Confirmation & Conversion of SAC MW

### Description

The Net Position/Deficit Dashboard screen allows users to view how their initial PRMR is being fulfilled at the Market Participant level. Additionally, users may also use this screen to specify the amount of PRMR that they do not wish to fulfill and as result pay the Capacity Deficiency Charge.

- 1) Navigate to **Fulfillment** in header menu.
- 2) Select **NET Position/Deficit Dashboard**.



3) Select **Auction** from the drop-down menu.

## PRMR Position/Submit Demand

DPCM - DAIRYLAND POWER COOPERATIVE

Summer 2023

PRMR POSITION/SUBMIT DEMAND REPORT

SUBMIT

CANCEL

Zone 1

HISTORY

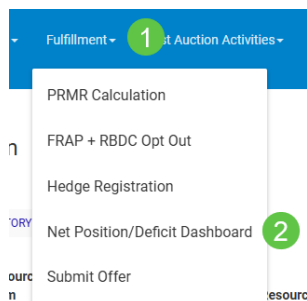
Auction PRMR	921.5
Auction FRAP	0.0
Capacity Deficient Amt (MW)	0.0
Auction	921.5

ZRC Available from Resources	676.2
Total Capacity Resources	437.5
Total LMR/Energy Efficiency	189.6
Total External	49.1
ZRC Bilateral Net	-105.9
ZRC Bilateral Purchased	55.0
ZRC Bilateral Sold	160.9
Total ZRC	570.3
Total FRAP	0.0
Self-Scheduled Offers	570.3
Cleared Offers	570.3
Pending Offers	0.0
Pending ZRC Bilateral	0.0
Available ZRC	0.0

## 25. ELECTING TO PAY THE CAPACITY DEFICIENCY CHARGE

1) Navigate to **Fulfillment** in header menu.

2) Select **NET Position/Deficit Dashboard**.



3) From drop-down select **Auction**.

4) Enter **Capacity Deficient Amount (MW)**

5) Click **Submit** to save or **Cancel** to go back without making any changes.

PRMR POSITION/SUBMIT DEMAND REPORT

SUBMIT

CANCEL

Minimum Capacity Obligation:	Current Converted ZRCs:	Minimum Capacity Obligation Deficiency:	Minimum Capacity Obligation Penalty:
1395.8 MW	2897.0 ZRCs	0.0 MW	\$0.00

Zone 4

Auction PRMR	0.0	ZRC Available from Resources	0.0
Auction FRAP	0.0	Total Capacity Resources	0.0
Capacity Deficient Amt (MW)	0.0	Total LMR/Energy Efficiency	0.0
Auction	0.0	Total External	0.0
		ZRC Bilateral Net	25.0
		ZRC Bilateral Purchased	25.0
		ZRC Bilateral Sold	0.0
		Total ZRC	25.0
		Total FRAP	0.0
		Self-Scheduled Offers	25.0
		Cleared Offers	25.0
		Pending Offers	0.0
		Pending ZRC Bilateral	0.0
		Available ZRC	0.0

## 26. SUBMIT OFFER

### Access and BPM Reference

Responsibility	Load Serving Entity, Planning Resource Owner
User Role Requirement	Operator – Submit, Operator – View
BPM 11 Resource Adequacy	5.5 Planning Resource Auction (PRA)

### Description

The Submit Offer screen allows for Market Participants to submit ZRC offers into the Planning Resource Auctions. Market Participants do not submit PRMR bids into the auction as all PRMR not fulfilled in the FRAP or elected to not participate is automatically modeled in the auction.

## 27. SUBMIT A ZRC OFFER

- 1) Navigate to **Fulfillment** in the header menu.
- 2) Select **Submit Offer**.



Fulfillment ▾ 1 Post Auction Activities

PRMR Calculation

FRAP + RBDC Opt Out

Hedge Registration

Net Position/Deficit Dashboard

Submit Offer 2

3) From the drop-down select **Season**.

4) Select **Add New Offers**.

Submit Offer

Summer 2023 3 ▾

**Auction Status**

Offer Submission Open Date : 04/18/2023  
Offer Submission Close Date: 04/21/2023

Auction Status: **Approved**

**Existing Planning Resource Auction Offers**

[EXPORT ▾](#) [+ ADD NEW OFFERS 4](#)

RZ	Submitted	Asset Owner	Resource	Seg 1 Qty/Price	Seg 2 Qty/Price	Seg 3 Qty/Price	Seg 4 Qty/Price	Seg 5 Qty/Price	Status

5) Select the desired Planning Resource and provide between one and five ZRC and Price Segments, then click **Submit**.

This section now includes the default population of new offers to assume all remaining ZRC Balance MWs at a \$0 price to reflect the majority of self-schedule offers.

## 27.1 EDIT A ZRC OFFER

To edit a previously submitted offer, select the desired **Planning Resource Auction**. Click the **Edit** link under the **Action** column. The tool will then display the **Add New Offer** screen. After editing the offer, click the **Submit** button to save the changes.

Add New Offer

Please note:

- ZRC Quantity and Offer Price values in each segment represent MW and \$/ZRC-Day, respectively.
- ZRC Quantity represents a total cumulative ZRC quantity at that segment.
- ZRC Quantity and Offer Price in each segment cannot be less than that of previous segments.
- The highest Offer Price in any segment cannot exceed the Max Offer Price. Max Offer Price represents the daily RZ CONE value.

[SUBMIT RECORDS](#) [RESET](#) [CANCEL](#)

Planning Resource	ZRC Balance	Max Offer Price	Asset Owner	Segment 1 ZRC Quantity	Offer Price	Segment 2 ZRC Quantity	Offer Price	Segment 3 ZRC Quantity	Offer Price	Segment 4 ZRC Quantity	Offer Price	Segment 5 ZRC Quantity	Offer Price

## 27.2 WITHDRAW A ZRC OFFER

To withdraw a previously submitted offer, select the desired **Planning Resource Auction**, then click the **Withdraw** link on the **Submit Offer Index** screen.

## 28. AUCTION RESULTS

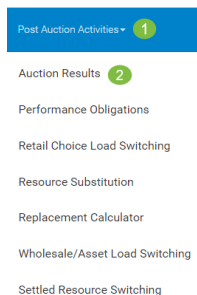
### Access and BPM Reference

Responsibility	Load Serving Entity, Planning Resource Owner
User Role Requirement	Operator – Submit, Operator – View
BPM 11 Resource Adequacy	5.5.8 – Auction Results Posting

### Description

The Auction Results screen is divided into three sections – “Auction Status” and “Offer Transaction List”. The Auction Status field displays the auction open date, close date, and current status. The Auction Results section displays the Auction Clearing Price for each Local Resource Zone, and its respective Cleared Amount consists of both Fixed Resource Adequacy Plan (FRAP) MW and the total cleared ZRC amounts. The Offer Transaction List section displays the list of all offers submitted via the Submit Offer screen and the quantity of offers cleared during the Auction process. Any offers with the “Cleared” status indicates that the amount shown under “Qty Cleared” were entirely cleared by the Auction process.

- 1) Navigate to **Post Auction Activities** in the header menu.
- 2) Select **Auction Results**.



- 3) From the drop-down menu, select desired **Auction**.

## Auction Results

3

Auction Status			
Offer Submission Open Date : 03/28/2022 Offer Submission Close Date: 03/31/2022		Auction Status: <b>Approved</b>	

Auction Results			
EXPORT	HISTORY	Search	
RZ		ACP (\$/MW-Day)	Total ZRCs Cleared
1		236.66	20560.2
2		236.66	13755.8

Offer Transaction List										
EXPORT	HISTORY	Search								
Offer Name	RZ	Asset Owner	Resource	Seg 1 Qty/Price	Seg 2 Qty/Price	Seg 3 Qty/Price	Seg 4 Qty/Price	Seg 5 Qty/Price	Status	Qty Cleared
No data available in table										

## 29. PERFORMANCE OBLIGATIONS

### Access and BPM Reference

Responsibility	Planning Resource Owner
User Role Requirement	Operator – Submit, Operator – View
BPM 11 Resource Adequacy	6 - Performance Requirements

### Description

The Performance Obligation screen displays the list of resources cleared or used in a FRAP and their obligation balance.

- 1) Navigate to **Post Auction Activities** in the header menu.
- 2) Select **Performance Obligations**.

Post Auction Activities	1
Auction Results	
Performance Obligations	2
Retail Choice Load Switching	
Resource Substitution	
Replacement Calculator	
Wholesale/Asset Load Switching	
Settled Resource Switching	

3) From the drop-down select **Auction**.

4) Enter **Date** in textbox.

Performance Obligations Summer 2023 3

Date:  4

[EXPORT](#)

Resource Name	Effective Date	Transaction Date	Transaction Type	Transaction Amount	Obligation Balance	Additional Information
---------------	----------------	------------------	------------------	--------------------	--------------------	------------------------

## 30. RETAIL CHOICE SWITCHING LOAD SWITCHING

### Access and BPM Reference

Responsibility	Electric Distribution Company
User Role Requirement	EDC Submit
BPM 11 Resource Adequacy	5.7.4 Retail Load Switching

### Description

The Retail Choice screen allows an Electric Distribution Company (EDC) to enter and view retail choice switching information.

MPs with Asset Owners in an EDC's service territory that is using the default method can also view retail choice switching data.

### 30.1 SUBMIT RETAIL CHOICE SWITCHING

1) Navigate to **Post Auction Activities** in the header menu.

2) Select **Retail Choice Load Switching**.

Post Auction Activities 1

Auction Results

Performance Obligations

Retail Choice Load Switching 2

Resource Substitution

Replacement Calculator

Wholesale/Asset Load Switching

Settled Resource Switching

3) From the drop-down select **Auction**.

4) Enter desired **Operation Date**.

5) Check the PLC for Operation Date.

6) **Submit** if complete. **Cancel** to go back without making any changes.

## Retail Choice Load Switching

Summer 2023 **3**

Operation Date: 08/01/2023 **4**

[EXPORT](#) [SUBMIT](#) [CANCEL](#)

Search

EDC	LBA	Asset Owner	PLC for Current Date	PLC for Operation Date
Total: 7332.2				
			16.4	16.4 <b>5</b>

### 30.2 VIEW RETAIL CHOICE SWITCHING

Market Participants with deregulated demand may view their respective retail switching information using the Retail Choice screen.

- 1) From the drop-down select **Auction**.
- 2) Enter **Operating Date** for which you would like to view your obligation.

## Retail Choice Load Switching

Summer 2023 **1**

Operation Date: 08/01/2023 **2**

[EXPORT](#) [SUBMIT](#) [CANCEL](#)

Search

EDC	LBA	Asset Owner	PLC for Current Date	PLC for Operation Date
Total: 7332.2				
			16.4	16.4

### 31. SETTLED RESOURCE SWITCHING

- 1) Navigate to **Post Auction Activities** in the header menu.
- 2) Select **Settled Resource Switching**.

**Post Auction Activities** **1** OMS

[Auction Results](#)

[Performance Obligations](#)

[Retail Choice Load Switching](#)

[Resource Substitution](#)

[Replacement Calculator](#)

[Wholesale/Asset Load Switching](#)

[Settled Resource Switching \*\*2\*\*](#)

- 3) From the drop-down select **Auction**.
- 4) Select **Settled Resource Switching**.

Settled Resource Switching

Summer 2023 **3** ▼

EXPORT ▼ + NEW **4** CALCULATE TRANSFERABLE AMOUNT

Search

Transaction Name	Current NERC	Current Asset Owner	New NERC	New Asset Owner	RZ	Amount (MW)	Effective Date
No data available in table							
				Previous	Next		

- 5) Enter **Transaction Name**.
- 6) Enter **MW Amount**.
- 7) Use drop-down to select **New NERC ID**.
- 8) Enter **Resource Zone**.
- 9) Use drop-down to select **Current Asset Owner**.
- 10) Use drop-down to select **New Asset Owner**.
- 11) Enter **Effective Date**.
- 12) Click **Submit**.

Create

×

Transaction Name <b>5</b>		Amount <b>6</b> MW	
Current NERC ID	New NERC ID <b>7</b> ▼	RZ <b>8</b>	
Current Asset Owner <b>9</b> ▼	New Asset Owner <b>10</b> ▼	Effective Date <b>11</b>	
		<b>12</b>	
		CANCEL SUBMIT	

## 31.1 CALCULATING TRANSFERABLE AMOUNT

- 1) Navigate to **Post Auction Activities** in the header menu.
- 2) Select **Settled Resource Switching**.

Post Auction Activities
1 OMS

Auction Results
Performance Obligations
Retail Choice Load Switching
Resource Substitution
Replacement Calculator
Wholesale/Asset Load Switching
Settled Resource Switching
2

3) Select **Calculate Transferable Amount**.

Settled Resource Switching
Summer 2023

EXPORT
NEW
CALCULATE TRANSFERABLE AMOUNT
3

Transaction Name
Current NERC
Current Asset Owner
New NERC
New Asset Owner
RZ
Amount (MW)
Effective Date

No data available in table

Previous
Next

- Use drop-down to select **Current NERC ID**.
- Enter **Resource Zone**.
- Use drop-down to select **Current Asset Owner**.
- Enter **Effective Date**.
- Enter **Calculated Transferable Amount (MW)**
- Click **Submit**.

Calculate Transferable Amount
X

Current NERC ID
4

RZ
5

Current Asset Owner
6

Effective Date
7

Calculated Transferable Amount (MW)
8

9

CANCEL
SUBMIT

## 32. RESOURCE SUBSTITUTION

### Access and BPM Reference

Responsibility	Asset Owner
User Role Requirement	Operator – Submit, Operator -View
BPM 11 Resource Adequacy	6.4 Replacement Resources

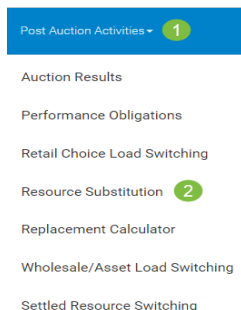
### Description

The Resource Substitution screen allows Market Participants to either view previously substituted Planning Resources or assign available Zonal Resource Credits (ZRCs) for the purpose of Resource Substitution. These ZRCs would have either cleared in the most recent Planning Resource Auction or were identified in a FRAP during the current Planning Year. The Planning Resource used for substitution must have “Available ZRCs” that are either owned by the MP or were procured through bilateral transactions. A Planning Resource located in a different Resource Zone (LRZ) as the Planning Resource that is being decommitted must meet the Local Clearing Requirement (LCR), which respecting Capacity Import Limits (CIL) and Capacity Export Limits (CEL) when it is submitted for the resource replacement purpose. These entered resource substitutions will also impact the performance obligations both when enacting a replacement and once the termination date of the replacement is reached.

**Note:** The Replacement Calculator in MECT can be used for verifying if the Planning Resource being used for the replacement will meet all the required LRZ parameters including LCR, CIL and CEL. See Section 32 – Replacement Calculator for more information.

### 32.1 VIEW RESOURCE SUBSTITUTION REGISTRATION

- 1) Navigate to **Post Auction Activities** in the header menu.
- 2) From the drop-down, select **Resource Substitution**.





EXPORT + ADD NEW RESOURCE

Search

Substitution Name	Substitution Type	Original Resource	Original MP	Original AO	Original RZ	Substitution Resource	Substitution MP	Substitution AO	Substitution RZ	Substitution Amount	Effective Date	Termination Date
No data available in table												

## 32.2 SUBMIT A NEW RESOURCE SUBSTITUTION REGISTRATION

- 1) Navigate to **Post Auction Activities** in the header menu.
- 2) From the drop-down, select **Resource Substitution**.

Post Auction Activities 1

- Auction Results
- Performance Obligations
- Retail Choice Load Switching
- Resource Substitution 2
- Replacement Calculator
- Wholesale/Asset Load Switching
- Settled Resource Switching

- 3) From drop-down menu, select **Season**.
- 4) Select **New**.

Resource Substitution

Fall 2025

3

EXPORT

X

+ NEW

4

Search

Substitution Name	Substitution Type	Original Resource	Original MP	Original AO	Original RZ	Substitution Resource	Substitution MP	Substitution AO	Substitution RZ	Substitution Amount	Status	Effective Date	Termination Date
No data available in table													
Showing 0 to 0 of 0 entries													
Show 15 entries											Previous Next		

- 5) Enter **Resource Substitution Name**.
- 6) Use drop-down to select **Original Resource**.
- 7) Use drop-down to select **Substitution Resource**.
- 8) Enter **Substitution Amount ZRC**.
- 9) Enter **Effective Date**.
- 10) Enter **Contact Person**.
- 11) Enter **Contact Email**.
- 12) Enter **Contact Phone**.
- 13) Enter your Crow Ticket # in the **Resource Substitution Comments**.

14) Select **Create** to submit or **Cancel** to leave without saving any information.

Create ×

Resource Substitution Name 5

---

Original Resource 6 ▼

---

Substitution Resource 7 ▼

---

Substitution Amount 8 ZRC Effective Date 9

---

Contact Person 10 Contact Email 11

---

Contact Phone 12

---

Resource Substitution Comments 13

---

14 CANCEL CREATE

15) Resource substitutions can be viewed and deleted before the effective date if needed by selecting the dropdown arrow

16) After the effective date Market Participants can identify a termination date between the effective date and current date through the drop-down arrow and selecting **Termination Date**

Substitution Name	Substitution Type	Terminate
<span>XYZ</span>	Resource	<div><span>?</span> Are you sure you want to terminate this Resource Substitution? This will end it, but not delete it.</div> <p>Termination Date</p> <hr/>
<span>View</span>	Resource	
<span>Terminate</span>	Resource	

CANCEL SUBMIT

### 33. VIEW ZONAL DATA

The Zonal Data section of the screen displays the PRMR, sum of cleared Offers and FRAPs, LCR,

CIL, CEL, Auction Import, Auction Export, Replacement Import and Replacement Export for each LRZ from the Planning Resource Auction (PRA). Import Available and Export Available numbers are updated each time the Resource Substitution from another LRZ is completed. The Import Available number represents the maximum Zonal Resource Credits (ZRCs) allowed to import into the LRZ without violating the CIL. Import Available for the LRZ is calculated as:

$$\text{Import Available} = \text{CIL} - \text{Total Import from PRA} + (\text{Sum of all Exports}^* - \text{Sum of all Imports}^*)$$

The Export Available number represents the maximum Zonal Resource Credits (ZRCs) allowed to export out of the LRZ without violating the CEL. Export Available for the LRZ is calculated as:

$$\text{Export Available} = \text{CEL} - \text{Total Export from PRA} + (\text{Sum of all Imports}^* - \text{Sum of all Exports}^*)$$

\*Additional Imports or Exports from the Resource Substitution Process.

### 33.1 REPLACEMENT

- 1) Navigate to **Post Auction Activities** in the header menu.
- 2) From the drop-down, select **Replacement Calculator**.

Post Auction Activities 1

Auction Results

Performance Obligations

Retail Choice Load Switching

Resource Substitution

Replacement Calculator 2

Wholesale/Asset Load Switching

Settled Resource Switching

#### 3) From the drop-down menu, select **Season**.

Replacement Calculator

Summer 2023 3

EXPORT

Search

Zonal Data	PRMR (Obligation)	Offers Cleared + FRAP	LCR	Import Level (CIL)	Export Level (CEL)	Auction Import	Auction Export	Replacement Import	Replacement Export	Import Available	Export Available
1	18234.4	19514.7	15076.1	5301.0	3959.0	0.0	1280.3	0.0	0.0	6581.3	2678.7
2	13371.2	14112.6	10552.0	3477.0	2550.0	0.0	741.4	0.0	0.0	4218.4	1808.6
3	10491.9	11320.8	6806.3	6108.0	4310.0	0.0	828.9	0.0	0.0	6936.9	3481.1
4	9559.5	7522.6	2935.0	7884.0	9999.0	2036.9	0.0	18.7	0.0	5808.4	12054.6
5	8115.3	7392.0	6529.5	3576.0	9999.0	723.3	0.0	0.0	0.0	2852.7	10722.3
6	18107.7	14313.5	11567.6	8492.0	2703.0	3794.2	0.0	115.7	112.0	4694.1	6500.9
7	21232.8	21380.6	18785.5	5087.0	3993.0	0.0	147.8	112.0	1.5	5124.3	3915.7
8	7915.8	10761.7	7134.5	4139.0	5503.0	0.0	2845.9	0.0	86.3	7071.2	2570.8
9	21234.3	19857.3	19931.4	5268.0	1574.0	1377.0	0.0	0.0	0.0	3891.0	2951.0
10	4628.3	4708.9	3690.0	3064.0	1794.0	0.0	80.6	0.0	46.6	3191.2	1656.8

## 34. REPLACEMENT CALCULATOR

The Calculator is available for Market Participants to verify if the Planning resource planned for the resource replacement will meet all the required LRZ parameters including LCR, CIL and CEL. If the information entered passes the pertinent verification test then the message (s) will appear as “Pass” under LCR Test, Import Test and Export Test. A “Fail” message indicates that the verification test has failed to meet the test requirements.

### EXAMPLE:

- Total MW needing replacement in Zone 1: = 200 MW (Original Resource = AAA.FAIR)
- Replacement ZRCs from the same zone: Of that 200 MW, 100 MW will be replaced by other Planning Resources located in Zone 1 (Substitution Resource = AAA.HARRIS)
- ZRCs from same zone after replacement: Zone 1’s total ZRCs from Zone 1 after replacement = Offers Cleared + FRAP – Total MW needing replacement + Replacement ZRCs from the same zone =  $18,661.2 - 200 + 100 = 18,561.2$
- LCR Test: Since  $18,561.2 < \text{Zone 1’s LCR of } 16,588.7$ , LCR Test is “Pass”
- Amount Expected: Remaining Replacement ZRCs of 100 MW are imported from Zone 2 and Zone 3:

Zone 2’s Exported ZRCs = 40 MW (Substitution Resource = BBB.MURRAY)

Zone 3’s Exported ZRCs = 60 MW (Substitution Resource = CCC.GLEN)

- Import Test: Zone 1’s total Imported ZRCs = 100 MW (40 MW + 60 MW). Since  $100 \text{ MW} < \text{Import Available of } 4040.3$ , Import Test is “Pass”.
- Export Test: Since Zone 2’s Export of 40 MW < Export Available of 917.8 MW and Zone 3’s Export of 60 MW < Export Available of 4,080.2 MW, Export Test for Zone 2 and 3 are “Pass”.
- This scenario will require the following 3 separate Resource Substitution Registrations to replace AAA.FAIR for the full amount of 200 MW in Zone 1:

First 100 MW of AAA.FAIR:	Replaced AAA.HARRIS for 100 MW from Zone 1
Second 40 MW of AAA.FAIR:	Replaced by BBB.MURRAY for 40 MW from Zone 2
Remaining 60 MW of AAA.FAIR:	Replaced by CCC.GLEN 601 MW from Zone 3

### 34.1 ACCESSING REPLACEMENT CALCULATOR

- 1) Navigate to **Post Auction Activities** in the header menu.
- 2) From the drop-down, select **Replacement Calculator**.

3) Enter in information and select **Calculate**. To reset calculator, click **Reset**.

▶ CALCULATE

↺ RESET

3

Calculator	Total MW needing replacement	Replacement ZRCs from the same zone	ZRCs from same zone after replacement	LCR test	Total Import Amount Needed	Amount Exported	Import Test	Export Test
1	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
2	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
3	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
4	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
5	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
6	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
7	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
8	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
9	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		
10	<input type="text" value="0"/>	<input type="text" value="0"/>				<input type="text" value="0"/>		

35. WHOLESALE/ASSET LOAD SWITCHING

Access and BPM Reference

Responsibility	Load Serving Entity
User Role Requirement	Operator – Submit, Operator -View
BPM 11 Resource Adequacy	5.7.2 Wholesale (Non-Retail) Load Switching

Description

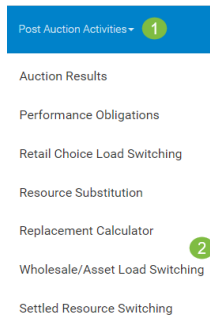
The Wholesale/Asset Load Switching screen allows Market Participants to enter Wholesale Load Switching transactions (WLST). These transactions allow for transferring of PRMR obligation after the execution of the applicable Planning Resource Auction. The result of a confirmed WLST will be reflected and adjusted to the RA\_PRMR billing determinate in the Settlement statements.

Only the seller of WLST may initiate them. The transaction does not take effect until both counterparties have confirmed the transaction.

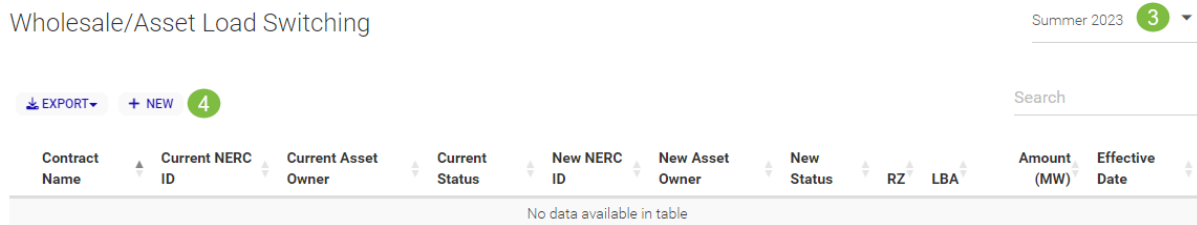
The amount entered into a WLST is validated against the current PRMR obligation for the seller. The amount must be less than or equal to the sum of all approved sales and purchases along with the sum of pending sales for the entire Planning Year and associated Planning Resource Auction. WLST are effective beginning at the specified date through the entire Planning Year.

## 35.1 SUBMIT A WHOLESALE LOAD SWITCHING

- 1) Navigate to **Post Auction Activities** in the header menu
- 2) From the drop-down menu select **Wholesale/Asset Load Switching**.



- 3) From drop-down make sure you are on the correct season.
- 4) Click **New**.



- 4) Enter information in all the fields.
- 5) Click **Create** to submit or **Cancel** to go back without making any changes.

## 35.2 CONFIRM OR REJECT WHOLESALE LOAD SWITCHING TRANSACTION

- 1) Navigate to **Post Auction Activities** in the header menu
- 2) From the drop-down menu select **Wholesale/Asset Load Switching**.

Post Auction Activities ▾	1
Auction Results	
Performance Obligations	
Retail Choice Load Switching	
Resource Substitution	
Replacement Calculator	
Wholesale/Asset Load Switching	2
Settled Resource Switching	

3) Click the arrow to the left of the **Contact Name** column and choose either **Confirm** or **Reject**.

Upon confirmation tool will immediately increase the buyer's cleared PRMR obligation and decrease the sellers for the MW being transferred. Additionally, any pending amounts withheld in escrow will be released back to the seller if a pending WLST is rejected.

Home

Contacts

Forecast

Planning Resources

Fulfillment

Post Auction Activities

Admin

OMS

Wholesale/Asset Load Switching

Test

2020-2021 PRA

EXPORT

NEW

Search

Contract Name	Current NERC ID	Current Asset Owner	Current Status	New NERC ID	New Asset Owner	New Status	RZ	LBA	Amount (MW)	Effective Date
STOMER A TO AM	Test1	AO A	CONFIRMED	Test2	AO B	CONFIRMED	6	LBA	136.8	06/09/2020

## 35.3 VIEW WHOLESALE LOAD SWITCHING TRANSACTION

All previously entered Wholesale Load Switching Transactions are available for review in the Wholesale/Asset Load Switching table. This table will display pending, confirmed and rejected Wholesale Load Switching Transactions.

Wholesale/Asset Load Switching										Summer 2023 ▾
EXPORT ▾ + NEW										Search
Contract Name	Current NERC ID	Current Asset Owner	Current Status	New NERC ID	New Asset Owner	New Status	RZ	LBA	Amount (MW)	Effective Date
No data available in table										

## 36. OMS-MISO SURVEY

Prior to accessing the OMS-MISO Survey module in MECT, access must be granted by your organizations Local Security Administrator (LSA). If you are unsure who your

organization's LSA is, please contact the MISO Help Center.

## 36.1 ACCESSING THE OMS-MISO SURVEY

1) From the MECT home screen, select **OMS**.

The screenshot shows the MISO Resource Adequacy MECT Home screen. The top navigation bar is blue with the MISO logo and links for Home, Contacts, Forecast, Planning Resources, Fulfillment, Post Auction Activities, and OMS. The OMS link is highlighted with a green circle and the number 1. Below the navigation bar, the page title "MECT Home" is displayed. The main content area features three sections: "Recent Comments" (No comments to display), "Announcements" (Please utilize MISO's Help Center portal... The latest release notes can be found on the RA webpage...), and "Deadlines" (No deadlines to display).

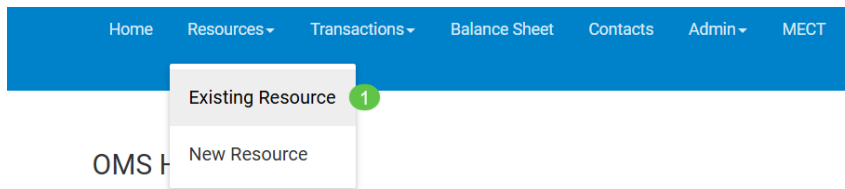
## OMS-MISO Survey Main Screen

The screenshot shows the OMS-MISO Survey Main Screen. The top navigation bar is blue with the MISO logo and links for Home, Contacts, Forecast, Planning Resources, Fulfillment, Post Auction Activities, and OMS. The OMS link is highlighted with a green circle and the number 1. Below the navigation bar, the page title "OMS Home" is displayed. The main content area features a section titled "OMS Announcements" with the following text: "Welcome to the OMS-MISO Survey module in the MECT tool. For General information regarding the OMS-MISO Survey, please visit our OMS-MISO Survey Webinar page. Below are links to Knowledge Articles with additional information: What's new for the OMS-MISO Survey, How to submit the MISO-OMS Survey, OMS-MISO Survey Walk Through and Enhancements (Video). For all OMS-MISO Survey related questions and support, please submit a ticket via the MISO Help Center".

## 36.2 VIEW/MINOR ADDS & EDITS FOR EXISTING RESOURCES

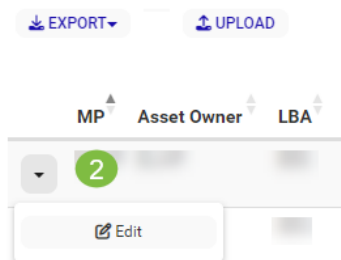
1) From the header menu, select **Resources**, then **Existing Resources**.





2) From list of resources, select the **down arrow** next to the resource you would like to edit, then click **Edit**.

OMS Existing Resources



3) Edit information.

4) Click **Submit**.

OMS Existing Resource

SUBMIT 4 CANCEL Status: Submitted

**General Information**

Planning Resource Name	Local Balancing Authority (LBA)	RZ
Fuel Type	Resource Type	Asset Owner
NA	NA	

**Capability**

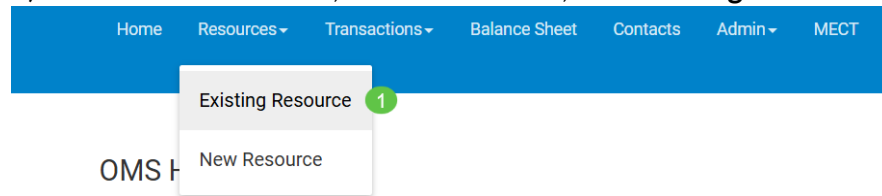
ICAP 3 SAC MW

Year	ICAP	SAC	Factor	Year	ICAP	SAC	Factor
2024	MW	MW	H	2025	MW	MW	H
2026	MW	MW	H	2027	MW	MW	H
2028	MW	MW	H	2029	MW	MW	H
2030	MW	MW	H	2031	MW	MW	H
2032	MW	MW	H				

As with many of the pages, if any necessary fields have been left blank or populated with values not passing validation, red text should draw users' attention to needed updates.

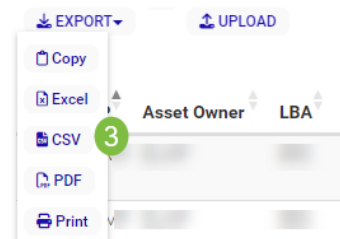
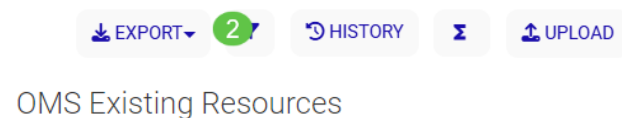
### 36.3 BULK ADDS OR EDITS FOR EXISTING RESOURCES

1) From the header menu, select **Resources**, then **Existing Resources**.



2) Click **Export**.

3) Select **CSV**.



4) Open CSV file in Microsoft Excel and edit contents in rows K-AM that need updates.

Additional existing resources may be added if not auto populated. Resources show up in the Existing Resources tab of the OMS-MISO Survey module once converted and confirmed for the plan year auction in question. If they resource will not be relied upon in the current plan year, but is still a valid resource in MECT, it may be added in this upload step as long as the informational columns align with how it appears in the Confirm or Convert SAC screens with resource name, Local Resource Zone, Market Participant, Asset Owner, etc.

5) Save file as a CSV in order to Upload.

6) From the OMS Existing Resources screen, click **Upload**.

OMS Existing Resources



7) You can either click **File** or drag and drop file into box.

8) Click **Upload**.

## Upload OMS Existing Resource Data

×

These columns will be ignored: Type, Fuel Type, Resource Type, SAC MW, Submitted  
All imported rows will have a status of 'SUBMITTED'.

File

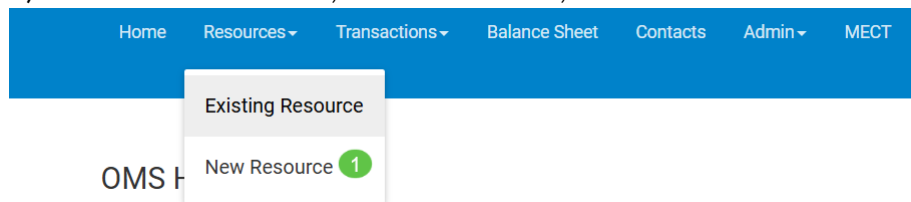
7

CLOSE 8 UPLOAD

9) Uploaded results screen will appear and give you feedback if any of the data did not pass validation.

## 36.4 VIEW/ MINOR ADDS & EDITS TO NEW RESOURCES

1) From the header menu, select **Resources**, then **New Resource**.



2) From the drop-down select the **Season**.

3) Select **New**.

OMS New Resources

06/2025 - 05/2026 2

EXPORT HISTORY + NEW 3 UPLOAD

Search

MP	Asset Owner	Project Name	Resource Type	GIQ#	BTMG?	Cause	RZ	Submitted	SAC MW (Summer)	Apply SAC (Summer)	SAC MW (Fall)	Apply SAC (Fall)	SAC MW (Winter)	Apply SAC (Winter)	SAC MW (Spring)	Apply SAC (Spring)	ICAP MW	Initial Eligible Plan Year
----	-------------	--------------	---------------	------	-------	-------	----	-----------	-----------------	--------------------	---------------	------------------	-----------------	--------------------	-----------------	--------------------	---------	----------------------------

4) Enter Project Name.

5) Use drop-down menu to select **Local Balancing Authority (LBA)**.

6) From drop-down select **RZ**.

7) Enter **GIQ Project Number**.

8) Use drop-down to select **DPP Study Phase**.

9) Check the box if resource is a BTMG.

10) Use drop-down to select **Asset Owner**.

11) Use drop-down to select **Resource Type**.

12) Enter **ICAP MW**. (For new resources, ICAP should be treated as nameplate)

13) Use drop-down to select **Year** the resource should qualify for capacity credit.

#### 14) Click **Submit**.

OMS New Resource

[SAVE DRAFT](#) [SUBMIT](#) [CANCEL](#) 14 Status:

General Information

Project Name \*

4

Local Balancing Authority (LBA)

5

RZ

6

GIQ Project Number

7

DPP Study Phase

8

☐ Is BTMG?

9

Asset Owner

10

Capability

Resource Type

11

ICAP

12

MW

Year

13

Pooled EFORD % (Calculated)

SAC (Calculated)

MW

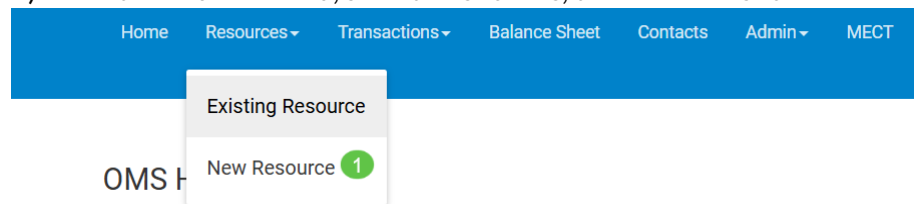
Comment

Cause

Comments

### 36.5 BULK ADDS OR EDITS TO NEW RESOURCES

#### 1) From the header menu, select **Resources**, then **New Resource**.



#### 2) From the drop-down select the **Season**.

#### 3) Select **Export**.

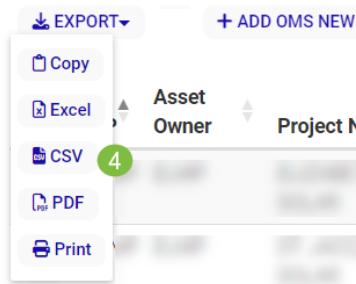
OMS New Resources 06/2025 - 05/2026 2

[EXPORT](#) 3 [HISTORY](#) [+ NEW](#) [UPLOAD](#)

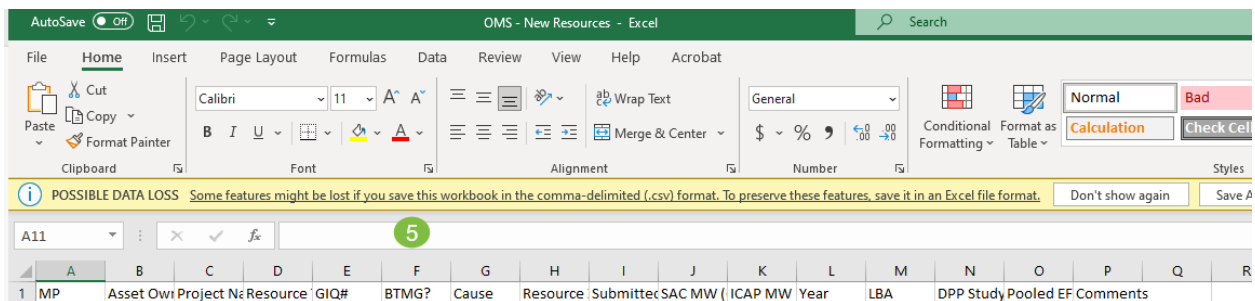
MP	Asset Owner	Project Name	Resource Type	GIQ#	BTMG?	Cause	RZ	Submitted	SAC MW (Summer)	Apply SAC (Summer)	SAC MW (Fall)	Apply SAC (Fall)	SAC MW (Winter)	Apply SAC (Winter)	SAC MW (Spring)	Apply SAC (Spring)	ICAP MW	Initial Eligible Plan Year
----	-------------	--------------	---------------	------	-------	-------	----	-----------	-----------------	--------------------	---------------	------------------	-----------------	--------------------	-----------------	--------------------	---------	----------------------------

#### 4) From the drop-down select **CSV**.

## OMS New Resources



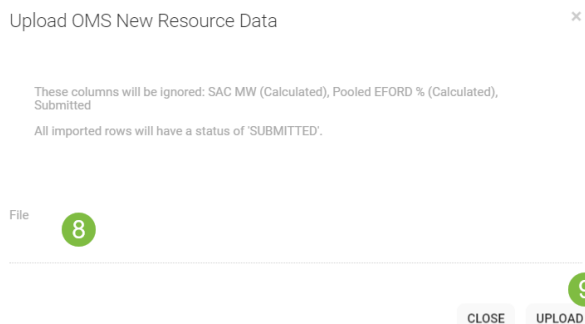
- 5) Open the CSV in Excel and edit.
- 6) Save file as a CSV in order to Upload.



- 7) From the OMS New Resource screen, click **Upload**.



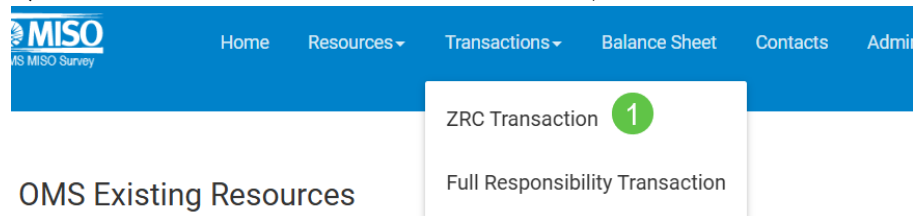
- 8) You can either click **File** or drag and drop file into box.
- 9) Click **Upload**.



- 10) Uploaded results screen will appear and give you feedback if any of the data did not pass validation.

## 36.6 VIEW/MINOR ADDS & EDITS ZRC TRANSACTION

1) Select **Transactions** from the header menu., then **ZRC Transaction**.



2) From the drop-down select the **Season**.

3) Select **Add OMS ZRC Transaction**.



4) Enter **Contact Name**.

5) From the drop-down menu select **Source Resource Zone**.

6) From the drop-down menu select **Seller Market Participant**.

7) From the drop-down menu select **Seller Asset Owner**.

8) From the drop-down menu select **Seller Local Balancing Authority (LBA)**.

9) From the drop-down menu select **Buyer Market Participant**.

10) From the drop-down menu select **Buyer Asset Owner**.

As with all Full-Responsibility Transactions, a transaction need only be entered once. Any entered transaction between two registered MISO Market Participants and associated asset owners will show up on both parties' surveys.

Existing Transactions only valid for the prompt plan year cannot be deleted in the survey interface but can be easily zeroed out using edits made in the bulk change upload as highlighted below.

11) From the drop-down menu select **Sink Resource Zone**.

12) From the drop-down menu select **Fuel Type**.

13) Enter **ZRC SAV Amount (MW)**.

14) Enter **ICAP, SAC and Factor**.

## OMS ZRC Transaction

[SUBMIT](#)
[CANCEL](#)

Status:

General Information

Contract Name <span style="float: right;">4</span>	Source Resource Zone <span style="float: right;">5</span>	Planning Resource Name
Seller Market Participant <span style="float: right;">6</span>	Seller Asset Owner <span style="float: right;">7</span>	Seller Local Balancing Authority (LBA) <span style="float: right;">8</span>
Buyer Market Participant <span style="float: right;">9</span>	Buyer Asset Owner <span style="float: right;">10</span>	Sink Resource Zone <span style="float: right;">11</span>

Capability

Fuel Type <span style="float: right;">12</span>	RZ Internal Transfer Type (In/Out)	ZRC ICAP Amount (Calculated)	ZRC SAC Amount <span style="float: right;">13</span>
	Out	0 MW	0 MW

Year	ICAP	SAC	Factor	Year	ICAP	SAC	Factor
2024	0 MW	0 MW	H	2025	0 MW	0 MW	H
2026	0 MW	0 MW	H	2027	0 MW	0 MW	H
2028	0 MW	0 MW	H	2029	0 MW	0 MW	H
2030	0 MW	0 MW	H	2031	0 MW	0 MW	H
2032	0 MW	0 MW	H				

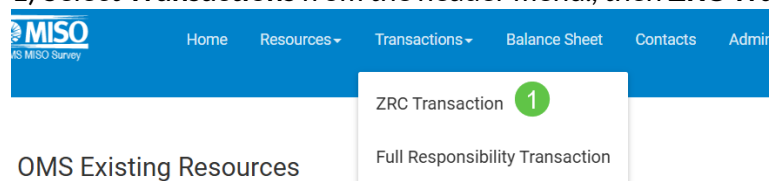
Comment

15) Click **Submit**.

[SUBMIT](#) 15 [CANCEL](#)

## 36.7 BULK ADDS OR EDITS - ZRC TRANSACTION

1) Select **Transactions** from the header menu., then **ZRC Transaction**.



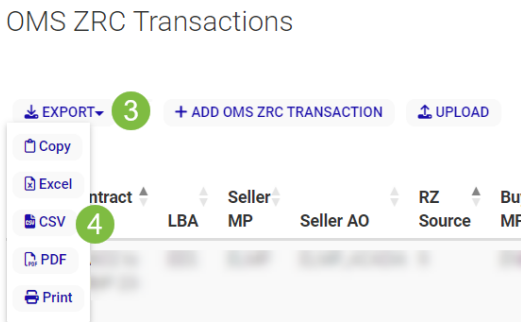
OMS Existing Resources

2) From the drop-down select the **Season**.



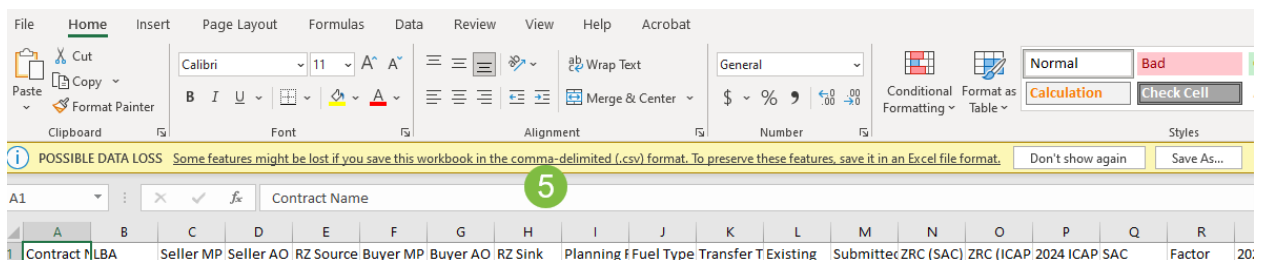
3) Select **Export**.

4) From the drop-down select **CSV**.

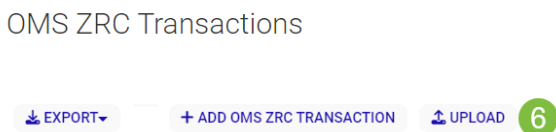


5) Open the CSV in Excel and edit.

6) Save file as a CSV in order to Upload.



7) From the ZRC Transaction screen, click **Upload**.



8) Uploaded results screen will appear and give you feedback if any of the data did not pass validation.



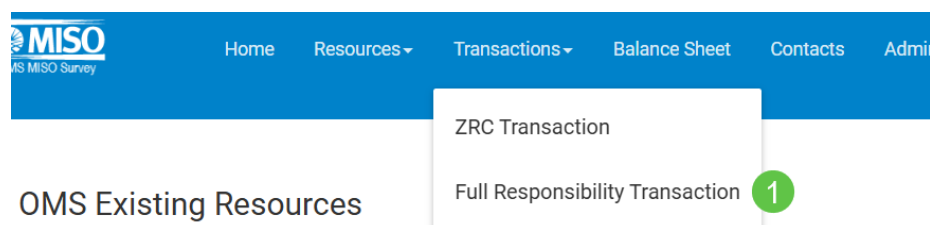
## 36.8 VIEW/MINOR ADDS & EDITS FULL RESPONSIBILITY TRANSACTION

In the context of FRTs, the Buyer is the one paying to have their load-serving obligation transferred to the Seller. The Seller is the one being paid to carry the additional load serving obligation and associated reserve requirements.

As with all ZRC transactions, a transaction need only be entered once. Any entered transaction between two registered MISO Market Participants and associated asset owners will show up on both parties' surveys.

Existing Transactions only valid for the prompt plan year cannot be deleted in the survey interface but can be easily zeroed out using edits made in the bulk change upload as highlighted below.

1) Select **Transactions** from the header menu, then select **Full Responsibility Transaction**.



2) From the drop-down select the **Season**.

3) Select **Add OMS FTR Transaction**.



4) Enter **Contact Name**.

5) Enter **Buyer Market Participant**.

6) From the drop-down menu select **Seller Market Participant**.

7) From the drop-down menu select **Resource Zone**.

8) From the drop-down menu select **Buyer Asset Owner**.

9) From the drop-down menu select **Seller Asset Owner**.

10) From the drop-down menu select **Local Balancing Authority (LBA)**.

## OMS Full Responsibility Transaction

Status:

General Information

Contract Name

4

Sale Or Purchase

Purchase

Buyer Market Participant

5

Seller Market Participant

6

Resource Zone

7

Buyer Asset Owner

8

Seller Asset Owner

9

Local Balancing Authority (LBA)

10

11) Enter **FRT MW**.

12) Enter **ICAP, SAC and Factor**.

Capability

FRT

11

MW

Year	ICAP	SAC	Factor	Year	ICAP	SAC	Factor
2024	0 MW	0 MW	H	2025	0 MW	0 MW	H
2026	0 MW	0 MW	H	2027	0 MW	0 MW	H
2028	0 MW	0 MW	H	2029	0 MW	0 MW	H
2030	0 MW	0 MW	H	2031	0 MW	0 MW	H
2032	0 MW	0 MW	H				

12

Comments

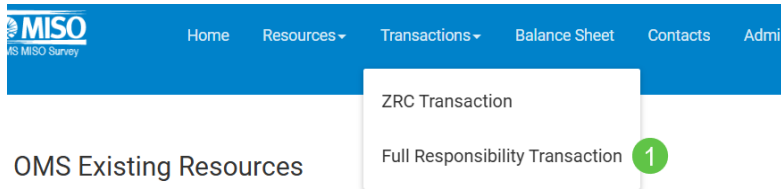
Comment

13) Click **Submit**.

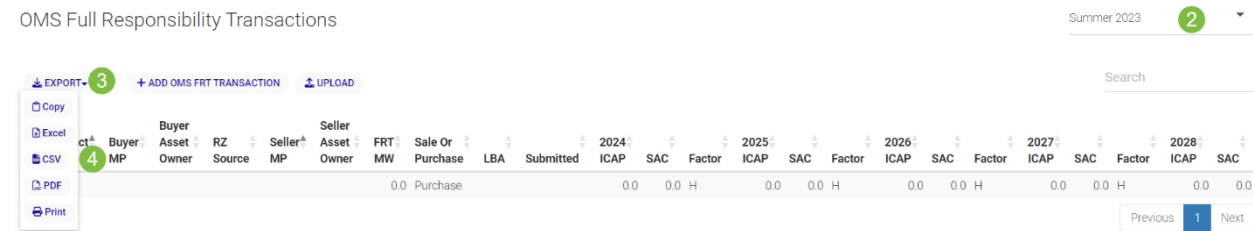
13

## 36.9 BULK ADDS OR EDITS – FULL RESPONSIBILITY TRANSACTION

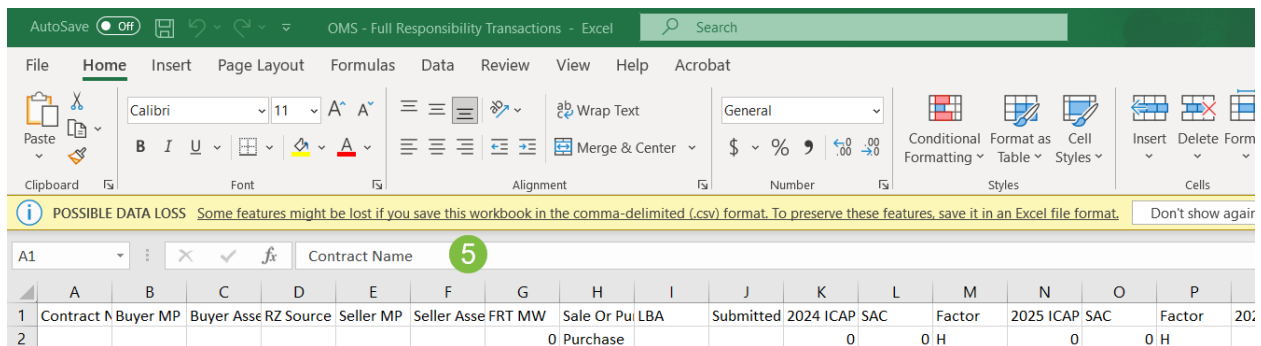
1) Select **Transactions** from the header menu, then select **Full Responsibility Transaction**.



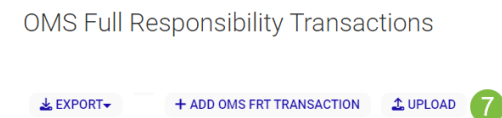
- 2) From the drop-down select the **Season**.
- 3) Select **Export**.
- 4) From the drop-down select **CSV**.



- 5) Open the CSV in Excel and edit.
- 6) Save file as a CSV in order to Upload.



- 7) From the OMS Full Responsibility Transaction screen, click **Upload**.



- 8) Uploaded results screen will appear and give you feedback if any of the data did not pass validation.

## 36.10 BALANCE SHEET

- 1) Select **Balance Sheet** from the header menu.

- 2) Under Show Values, select either ICAP or SAC radial button.
- 3) Select which auction you would like a balance sheet for. You can select one auction or multiple auctions by holding “ctrl” while selecting.

While selection of Asset Owner and Resource Zone is not required to get out-year Reserve Capacity values, selection of a Resource Zone is required to properly calculate out-year coincident peak forecasts and associated Reserve Margin Requirements.

- 4) Select **Get Balance Sheet**.

OMS Balance Sheet

06/2023 - 05/2024

The balance sheet is populated by submitted transactions. Please ensure your transactions are submitted to ensure your balance sheet numbers are correct.

Asset Owner

Resource Zone

Show Values

Auction (Multi-Select for multiple Auctions)

All

All

ICAP

SAC

Summer 2023

Fall 2023

Winter 2023-2024

Spring 2024

▶ GET BALANCE SHEET

CANCEL

- 5) Once balance sheet has populated, you can select **Export**.
- 6) You have options on the file type to export. Selecting the Workbook option would give you a file with a tab for each season's input screens if you chose to select multiple seasons. The tabs will start with the respective first two letters of the season to discern which data set is being viewed.

Auction: Fall 2023

EXPORT

SHOW ADDITIONAL TABLES

Copy

Excel

Workbook

CSV

PDF

Print

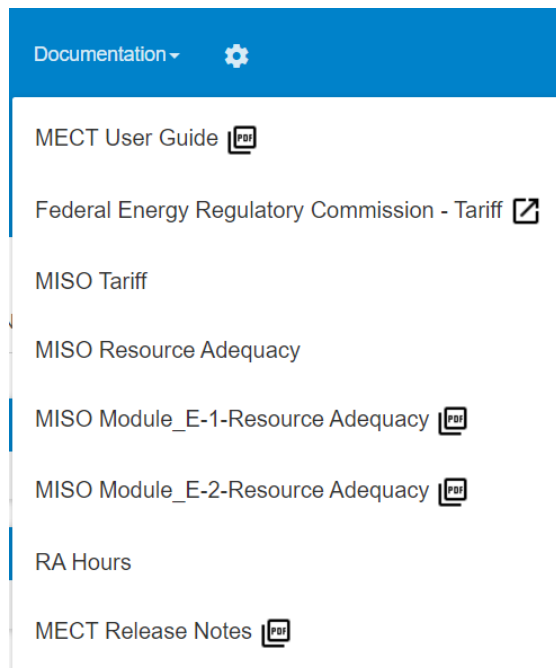
Resources (Existing Resource)

Resources (Existing Resource)

Behind the Meter (Existing Resource)

### 37. DOCUMENTATION

MECT Users may access relevant documents via the "Documentation" drop-down menu.



## 38. USER PREFERENCES

MECT has also been enhanced to include a "User Preferences" section that's accessible via the gear icon at the top right of the menu bar. This list of user preferences will continue to be refined, but in its initial roll-out includes customization of four main elements.



1. Data Tables Hover Highlight – Allows the user to better identify which row their cursor is on by highlighting the row selected across all MECT screens.
2. Data Tables Rows Shown – Users can set their preferred number of rows shown on any given MECT page. The option to change rows visible will still be found on any given page, but if a certain default is preferred, can be set here.
3. Data Tables Style – Offers a series of combinations of whether cells should be bordered, every-other row should be distinct shades, and whether rows should have more or less white space in a condensed or expanded view.
4. Shown Charts and Graphs By Default – Certain pages with graphable data are getting charts and graphs added throughout MECT. This setting allows the user to decide whether those should be shown or hidden by default. The charts will still be available and hidable on any given page individually, this just sets the default page load.

# User Preferences

Preferences are automatically saved upon entering and leaving the field or clicking on the Check icon.

Search

Preference		Preference Setting (editable)	Description
DataTables Hover Highlight	1	Yes	Yes instructs DataTables to highlight a row when the mouse is hovered over it.
DataTables Rows Shown	2	15	Select the # of rows to show by default.
DataTables Style	3	Default	Select the style for the DataTable components. Cell Borders: puts a border around the table cells. Striped: shades every other row in the table. Condensed: lessens the amount of white space.
Show Charts and Graphs By Default	4	Yes	Select to have Charts visible or hidden by default.

Showing 1 to 4 of 4 entries

Show 15 entries

Previous1Next

## RELATED DOCUMENTS

- [BPM-11 Resource Adequacy](#)
- [MISO Tariff Module E-1](#)
- NERC MOD Standards
- FERC 714 Reporting
- Appendix A – Acronym List

## APPENDIX A – ACRONYM LIST

ACP	Auction Clearing Price
ARC	Aggregated Retail Customer
ARR	Annual Revenue Rights
BPM	Business Practice Manual
BTMG	Behind-the-Meter-Generation
CCE	Customer Connectivity Environment
CEL	Capacity Export Limits
CIL	Capacity Import Limits
CPF	Coincident Peak Forecast
DSRI	Demand Side Resource Interface
EDC	Electric Distribution Company
ERZ	Emergency Response Coordinator
FRAP	Fixed Resource Adequacy Plan
FRP	Full Responsibility Purchases
FRS	Full Responsibility Sales
FRT	Full Responsibility Transaction
HUC	Historical Unit Considerations
LBA	Local Balancing Authority
LCR	Local Clearing Requirement
LRTA	Long-Term Reliability Assessment
LSA	Local Security Administrator
LSE	Load Serving Entity
MECT	Module E-1 Capacity Tracking
MP	Market Participant
PLC	Peak Load Contribution
PRA	Planning Resource Auction
PRMR	Planning Reserve Margin Requirement
RBDC	Reliability Based Demand Curve
SAC	Seasonal Accredited Capacity
SSLSA	Self-Service Local Security Administrator
TSR	Transmission Service Request
WLST	Wholesale Load Switching Transactions
ZDC	Zonal Deliverability Charge
ZRC	Zonal Resource Credit