# 2021 Capacity Bidding Program (CBP)

Nicolette Sowa

# Safety

## Earthquake

Know the safest places to duck, cover, and hold, such as under sturdy desks and tables.

## Fire

Know your exits, escape routes, and evacuation plan. If safe to do so, use your compliant fire extinguisher. Exit the house and call 911.

## Medical Emergency

Know who can perform first aid and CPR. Call 911 if you're alone or share your location with the call leader to send help.

## Emergency Planning

- ✓ Update emergency contacts at your organization.
- ✓ Create or update your personal emergency preparedness plan at your organization.

## Psychological Safety

- ✓ I'm cared for.
- ✓ People have my back and I have theirs.
- ✓ It's safe to take risks.
- ✓ New ideas are welcome.
- ✓ I practice self-care.

## Ergonomics

- ✓ Practice ***30/30*** (every 30 minutes, move & stretch for 30 seconds).
- ✓ Schedule a virtual ergonomic evaluation if possible

## COVID-19

- ✓ Maintain at least 6' distance where possible.
- ✓ Wear your mask.
- ✓ Wash hands frequently.
- ✓ Visit the state COVID-19 site for the latest updates and tips.

# PG&E DEMAND RESPONSE TEAM


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# 2021 CHANGES

- **Tier 2 AL (Approved 3/8/21)**
  - Nominations <100kW allowed
    - Prescribed, 1-4 hour option
  - 5-in-10 residential baseline
  - Nomination window 1st-15th of the month prior
  - Bid window 3 days prior
  - Program notification time 4pm-5pm day-ahead
  - Tariff Clarifications:
    - De-enrollment process
    - Baseline exclusions of events
- **Reliability OIR (PD 3/5/21)**
  - Increase max events per month from 5-6; events per month take precedence over max hours per month (30)
  - Other proposed changes not approved in PD:
    - Bid cap for Elect ($650)
    - Increased October capacity incentive
    - Weekend option
  - Final Decision expected by 4/5/21

# APPLICABILITY

- CBP is integrated into the California Independent System Operators (CAISO) as a Proxy Demand Resource (PDR).
- CBP PDR's must comply with the current CAISO Tariff requirements on market participation.
- CBP is open to both Residential and Non-Residential Aggregators and Customers.

# ELIGIBILITY

- CBP is only a Day-Ahead program.
- Customers currently enrolled in a Third Party Demand Response Provider (DRP) program, or in a Utility DR Program with a different Aggregator, are not eligible.
- Customers receiving electric power from a DA or CCA are eligible.

- **Non-Residential Customers:**
  - May qualify to self-aggregate
  - Can dual participate only in the OBMC program
- **Residential Customers:**
  - May only enroll through an Aggregator
  - Can not participate in any other DR programs

| Enrollment: Created Date | Enrollment: Start Date | Enrollment: Status | Location: Submitted to CAISO | LSE-ID | Location: Status | SA ID | UUID | Customer | IneligibleReason | Additional Info |
|---|---|---|---|---|---|---|---|---|---|---|
| 3/16/2021 | 4/1/2021 | Eligible | 3/17/21 | PGE-FS | Pending | xxxxxxxxx | xxxxxxxxx | NAME - STREET - CITY | | |
| 3/17/2021 | 4/1/2021 | Eligible | 3/18/21 | EBCE-WB-S | Pending | xxxxxxxxx | xxxxxxxxx | NAME - STREET - CITY | | |
| 3/26/2021 | 4/1/2021 | Ineligible | | | | xxxxxxxxx | xxxxxxxxx | NAME - STREET - CITY | NO CC&B | New SA ID: XXXXXXXXX |
| 3/26/2021 | 5/1/2021 | New | 4/1/2021 | PGE-FS | Submitted | xxxxxxxxx | xxxxxxxxx | NAME - STREET - CITY | Internal issue, will be resolved before 4/15 | |
| 3/31/2021 | 5/1/2021 | Ineligible | 4/1/2021 | MEA-WB-S | Rejected | xxxxxxxxx | xxxxxxxxx | NAME - STREET - CITY | Location is active with DRP | |

# WEEKLY ENROLLMENT STATUS REPORT

# OPTIONS AND PRODUCTS

## All Options

- Aggregator nominates a monthly capacity amount.
- Aggregators are required to submit bids 3 days before trade day.
- Bid price can be different day to day, week to week, or month to month, but must be the same for every hour within the day.

## Prescribed

- PG&E sets CAISO market bid price and dispatch strategy within specified operating hours.
- 1-4 or 2-6 hour products only

# OPTIONS AND PRODUCTS

▸continued

## ▸Elect Option

- Aggregator selects its own CAISO market bid price within the specified operating hours.
- Bids must meet the Net Benefit Test <= Bid Price <= Market Cap Price
- 1-4, 2-6, or 1-8 hour product options

## ▸Elect+ Option

- Aggregator can participate in the CAISO market for additional hours
- Aggregator must participate in Elect Option
- Outside hours must be contiguous with the program Operation Hours, and have the same nominated price and MW value
- 1-4, 2-6, or 1-24 hour product options

# OPTIONS AND PRODUCTS

- **Additional Info**
  - Aggregators are required at time of nomination to select a program option for each SA.
  - Aggregators have the option to change program options monthly at time of nomination for each SA.
  - Program Operating Hours: 1pm - 9pm
  - Economic Events are capped at 6 events or 30 hours per month, whichever occurs first, and three consecutive events.*

* Elect/+ Participants can opt-in to additional events/hours if desired.

# CAPACITY NOMINATIONS

Capacity nominations must be completed by the 15th of the month prior to the operating month.

The capacity nomination cannot be greater than the sum of max demand of the nominated SAs.

All capacity nominations are fixed for their associated operating months.

Resource aggregations of 10 MW and above require telemetry.

- Aggregators are responsible for coordinating with the CAISO and any applicable fees to meet the telemetry requirements.

Aggregators' nomination options are required to specify by SAID:

- Program Option ( Prescribed, Elect , or Elect +)
- Event Duration Products ( 1-4 hour, 2-6 hour, 1-8 hour, or 1-24 hour)

▸**Continued**

- Capacity Nominations are at a Sub-LAP level.
- Aggregations of SAs must be at least 25kW.
  - Any aggregations nominated for <100kW will be combined by PG&E with other nominations <100kW with the same product (Prescribed, 1-4 hours) if possible, to meet the PDR requirements in the CAISO market, which includes 100 kW or more of load curtailment for each unique combination of:
    - Product
    - Sub-LAP
- Aggregators can combine non-residential and residential customers in their capacity nominations.*

# CAPACITY NOMINATIONS

* All customers must sign the APX enrollment form to accommodate a combined-type nomination.

# CAPACITY PAYMENT

- Capacity payments will be invoiced separately from the energy payment.
- No change for the capacity pricing.
- The capacity prices by month are the same prices across all 3 program options.
- No change for the capacity payment and penalty table.

# ENERGY PAYMENT

If no CBP Events are called during the operating month, the monthly energy payment is zero.

Monthly energy payments will be invoiced separately from the capacity payments.

The energy payment that each Aggregator may receive is based on performance for events equal to the underlying CAISO wholesale market PDR award.

- For nominations <100kW, energy payments will equal the day-ahead award price received for the MW/h delivered during each hour of an event, as calculated by PG&E.

In alignment with CAISO settlement timeframes, energy payments due under the CBP will be processed 55+ business days after the end of the operating month.

# METERING AND COMMUNICATION REQUIREMENTS

- In accordance with CAISO requirements, at least 45 calendar days of historic interval meter data using metering equipment must be submitted to CAISO for each SA, prior to that SA participating in CBP.

- The meter data must be Revenue Quality Meter Data (RQMD).

# PROGRAM TESTING

PG&E will have the option to call up to one (1) CBP Test Event per month for resources that do not receive a market award by the 20th day of the operating month.

The CBP Test Event will be called to demonstrate capacity with respect to the CBP Nomination. It will not exceed 2 hours.

Aggregators will receive capacity payments and penalties for CBP Test Events, and events will count towards the monthly product dispatch limits.

Aggregators will not receive energy payments for load reductions during CBP Test Events since energy payments are only passed through to Aggregators from CAISO market awards.

# PROGRAM TRIGGER AND NOTIFICATION

## Prescribed Trigger

- The CAISO DA market price > $95/MWh
- PG&E receives a market award or dispatch instruction from the CAISO for a PDR that's part of CBP
- PG&E forecast that capacity may not be adequate
- Forecasted temperature for a Sub-LAP exceeds the temperature threshold for the Sub-LAP

## Elect and Elect+ Trigger

- PG&E receives a market award from the CAISO for a PDR that's part of CBP as a result of the offer price specified by the Aggregator for a nominated portfolio

## Notifications

- Affected Aggregators will be notified no later than 5pm, or as soon as reasonably possible, the calendar day before a CBP Event

# ACCESS TO CUSTOMER USAGE DATA

- CBP specific customer usage data and reports are provided via APX.
- Complete the "Authorization to Receive Customer Information or Act on a Customer's Behalf" (Form 79-1095) and/or Notice to Add Or Delete Customers Participating in the Capacity Bidding Program (Form 79-1075) endorsed by Customer.

# CONFIDENTIALITY

- Aggregator bidding strategies and prices shall be considered confidential information.
- PG&E shall protect this confidential information from public disclosure, and shall not disclose such confidential information to unauthorized third parties, except for PG&E's employees, agents, counsel, accountants, advisors, individual customers who authorize the release of their customer information pursuant to an approved process (such as Electric Rule 24), utility contractors, or Commission contractors who have a need to know such information and have agreed to keep such information confidential and except as provided otherwise.
- PG&E will provide the Commission with confidential Aggregator information under Commission procedures for identifying and claiming confidential treatment.
- Release of confidential Aggregator information to utility and Commission contractors will be subject to such parties' agreement to protect the information from unauthorized use of public disclosure on terms consistent with PG&E and the Commission's rules and state law.

# QUESTIONS???

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# APX DR Program Contacts

| Name | Role | Phone Number | Email Address |
|---|---|---|---|
| Midson Hay | APX Program Manager | 408-597-4308 | mhay@apx.com, DR@apx.com |
| Nino Mijares | APX Operations Manager | 408-517-2129, Option 2 | nmijares@apx.com, DR@apx.com |
| Carl Schlemmer | APX DR Manager | 408-517-2134 | cschlemmer@apx.com, DR@apx.com |
| Jonathan Lew | PG&E Operations | N/A | jonathan.lew@pge.com |
| Randy Avalos | PG&E Operations | N/A | randall.avalos@pge.com |
| Nicolette Sowa | PG&E Program Manager | 541-337-1600 | nicolette.sowa@pge.com |

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# System Information

- Supported Browsers: Chrome, Edge,
  - Unsupported Browsers: IE10 and below, Safari
- Notification Information:
  - From address changes. “@apx.com” will remain the same.
    - e.g., helpdesk@apx.com <23947514_1517278394@apx.com>
  - Email server that should be whitelisted:
    - apx.com
    - notify.apx.com
    - notify.mir3.com
    - notify2.mir3.com
    - notify20.mir3.com
    - notify200.mir3.com
  - Phone number/Caller ID: 888-896-8640
  - SMS Short Code: 24639

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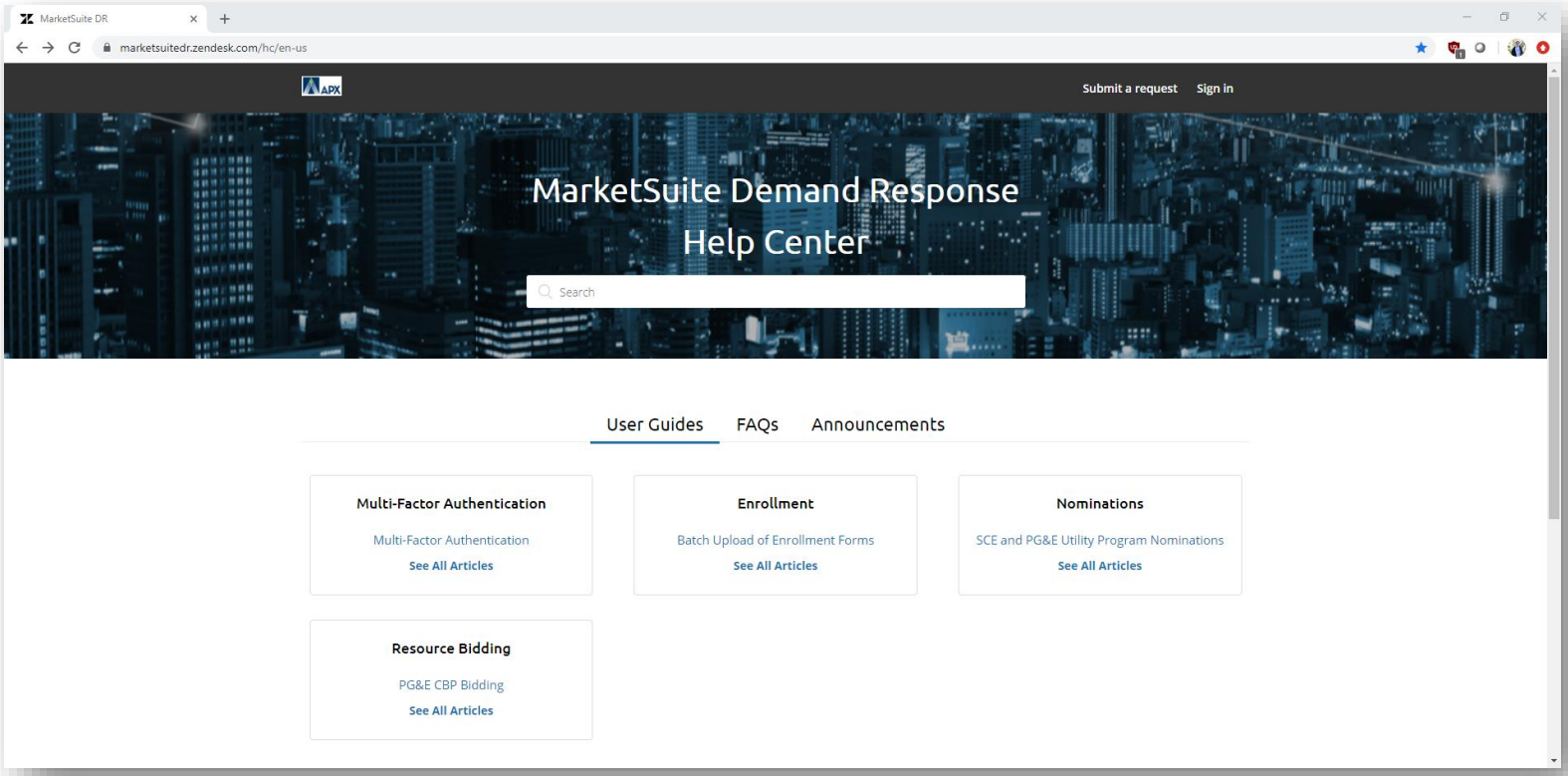
# MarketSuite DR Help Center

User guides to using MarketSuite DR System
https://marketsuitedr.zendesk.com/hc/en-us

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# CBP Overview

- CBP Residential
  - Enrollment process differs slightly from regular CBP
    - If residential customers sign agreement then aggregators can go through normal process
    - For CBP Residential, if the customer does not sign the agreement then they adds to the program will have to go through PG&E.
- CBP products
  - All product times are now 1PM-9PM to align with CAISO's peak hours
- Nominations
  - Window – First 15 business days of the month prior to the operating month
  - Nomination Portfolio – Product/Location
- Enrollment Enhancements
  - Batch upload functionality
  - Online customer approval
  - Enrollment timing will be based on successful PG&E CAISO PDR registration
- Settlements
  - Capacity payments remain the same
  - Energy payments will be a pass-thru from CAISO
    - Except for nominations less than **100kw**
- CAISO Bidding
  - Aggregators select their own CAISO market bid price for specified operating hours (only for Elect options)
  - Aggregators required to submit 3 days before the operating date (only for Elect options)
  - PG&E submits bids to CAISO

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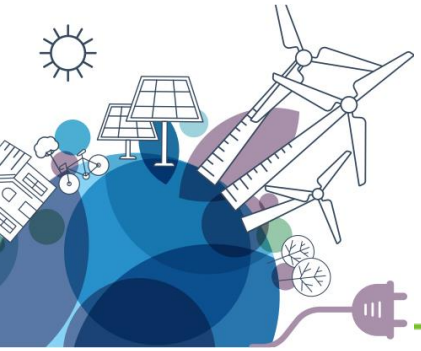

# 2021 APX DR System Review

**Registration**
- Participant
- Roles
- Contacts

**Electronic Enrollment**
- Add Forms
- Remove Forms

**Nomination**
- SAs
- Megawatts
- Products

**CAISO Bidding**
- Elect Option
- Elect + Option

**Capacity Settlement**
- Meter Data
- Baseline
- Settlement

**Report**
- Statements
- Meter Data
- History

Aggregators are required to submit their bids 3 days before trade day.

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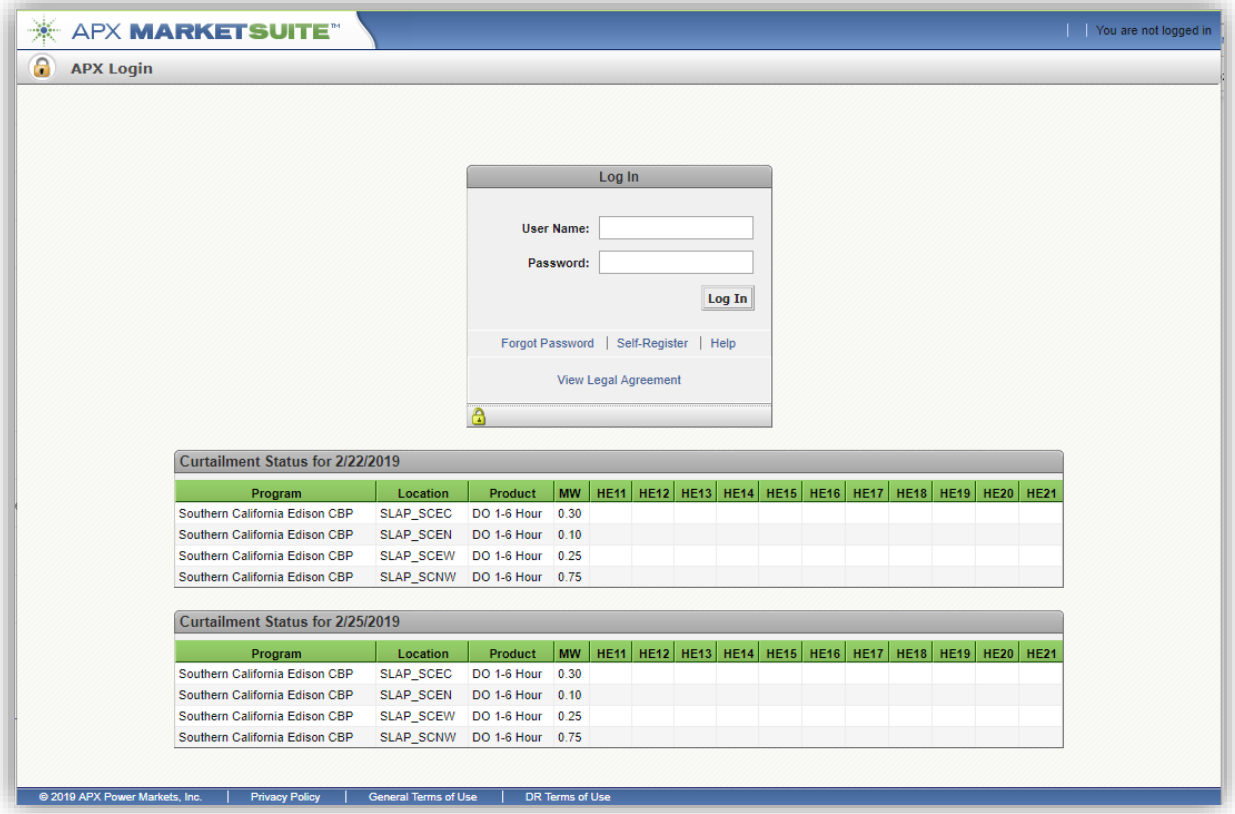
# DR Systems URL

- APX DR URL - [https://marketsuitedr.apx.com](https://marketsuitedr.apx.com)
  - Supported browsers are Microsoft Edge or Google Chrome

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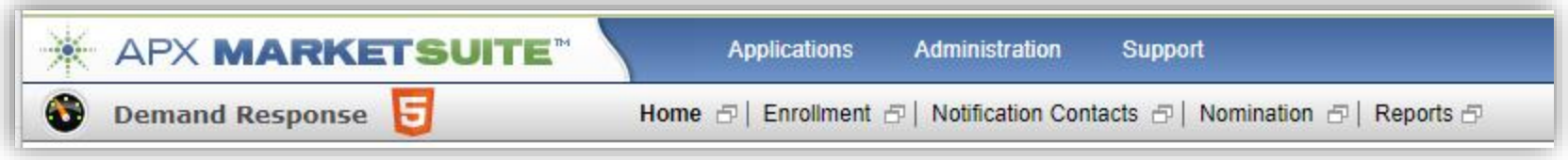
# DR Systems – Aggregator Functionality

- Self-Registration
- Manage Notification Contacts
- Submit Online Enrollments
- Manage Monthly Nominations
- Submit Bids
- View and Download Program Reports

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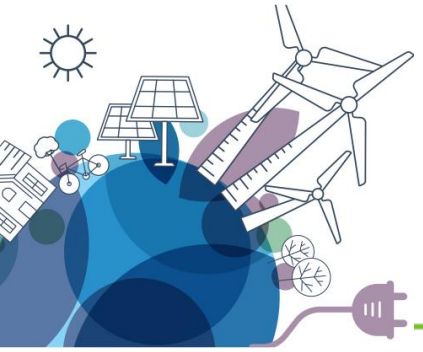

# DR Systems Registration

- Self-Registration
  1. Go to https://marketsuitedr.apx.com
  2. Click “Self-Register”
  3. Fill out the registration form
  4. Click “Create User”
  5. When you receive a confirmation email, click the link in the email to confirm the registration and for an APX account manager to review
  6. After your account has been reviewed an account activation email will be sent to the user when activated.

*Users can be provided with read-only rights. E.g. viewing enrollments

**Aggregators should let APX know when personnel leave so their username can be deactivated.

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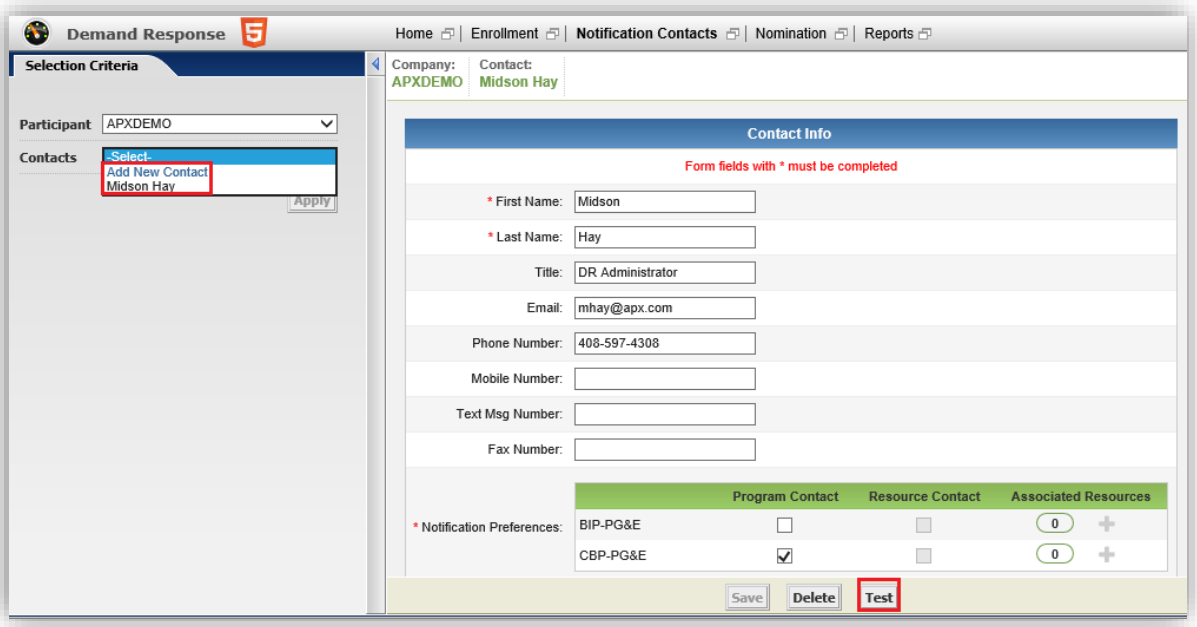
# Managing Notification Contacts

- In the Selection Criteria in the Contacts drop-down contains all active Notification Contacts and allows the user to Add New Contact
- At least one method of contact must be entered and at least one program must be selected. E.g. E-mail, Text Msg Number, or Phone number must be entered
- Clicking the “Test” button sends a test message to all the communication methods of contact listed for the contact

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# Online Enrollments

Add and Remove form creation, submission, and review process integrated into APX DR system.

**Electronic Form**

- Aggregator creates new form record in DR System
- Provides customer and aggregator contact information
- Lists service agreement to be added to the form/submitted to PG&E

**Customer Signature**

- Aggregator prints Form
- Obtains customer signature on Form
- Upload signed Form into DR System
- Submits electronic Form to PG&E

**Form Review/Approval**

- PG&E reviews Form
- Works with Aggregator, as necessary
- Approves, rejects or requires resubmission of Form
- SAs included on Delete forms are expired upon form approval

**Service Agreement Approval**

- PG&E reviews submitted service agreements and determines eligibility
- Aggregator monitors status
- Eligible accounts are added to aggregator portfolio

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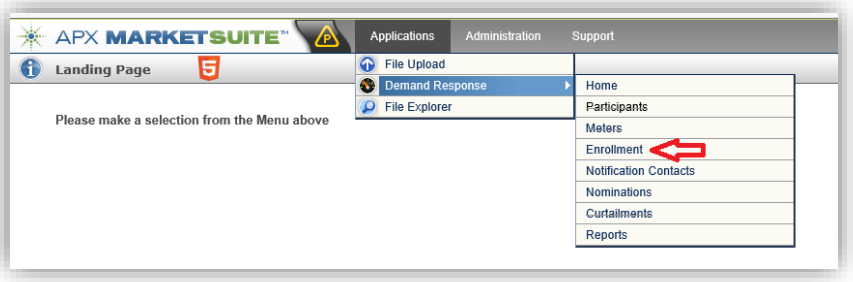
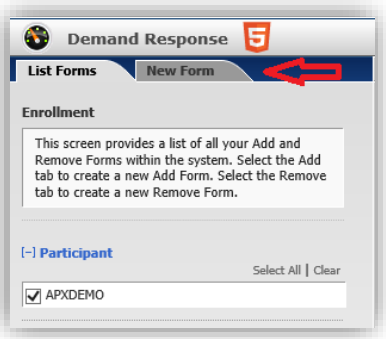
# Creating a New Add/Update/Delete Form

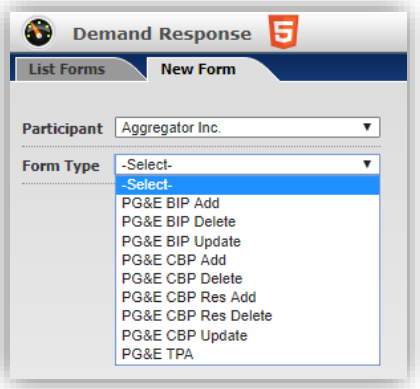
Step 1: Go to Applications > Demand Response > Enrollment




Step 2: Click on the "New Forms" tab on the left pane




Step 3: Select the form type applicable to you

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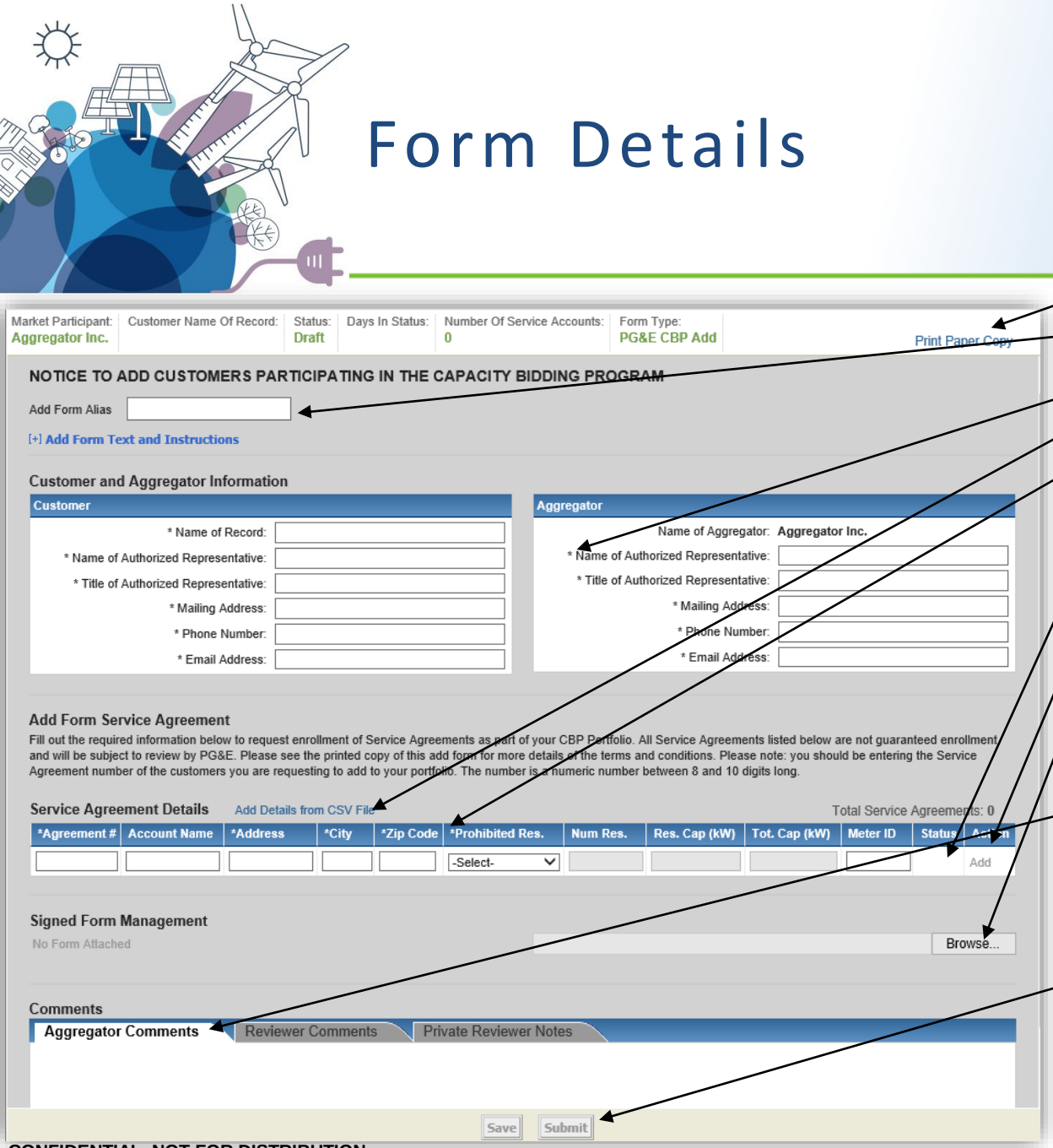
# Form Details




- Link to print form with completed data
- Alias assigned by Aggregator to organize Forms
- " * " indicates fields required for submission
- Link to upload data via csv (no headers)
- " * " indicates required fields for each Service Agreement. Note: Service Agreement number
- Displays Status of individual Service Agreement after form has been approved
- Links used to Add, Remove, or Delete service accounts from the form
- Click Browse... to select signed Form file to upload. Once selected, Click Save or Submit to attach the file. Note, you cannot remove a file after submitting the Form
- Aggregator Comments captures comments to be shared with PG&E. Reviewer Comments captures PG&E comments or instructions for the aggregator if Form has been returned to aggregator for editing and resubmission
- The Buttons listed on the bottom of the Add Form indicate available actions and next steps. The buttons only become enabled when all required data have been entered

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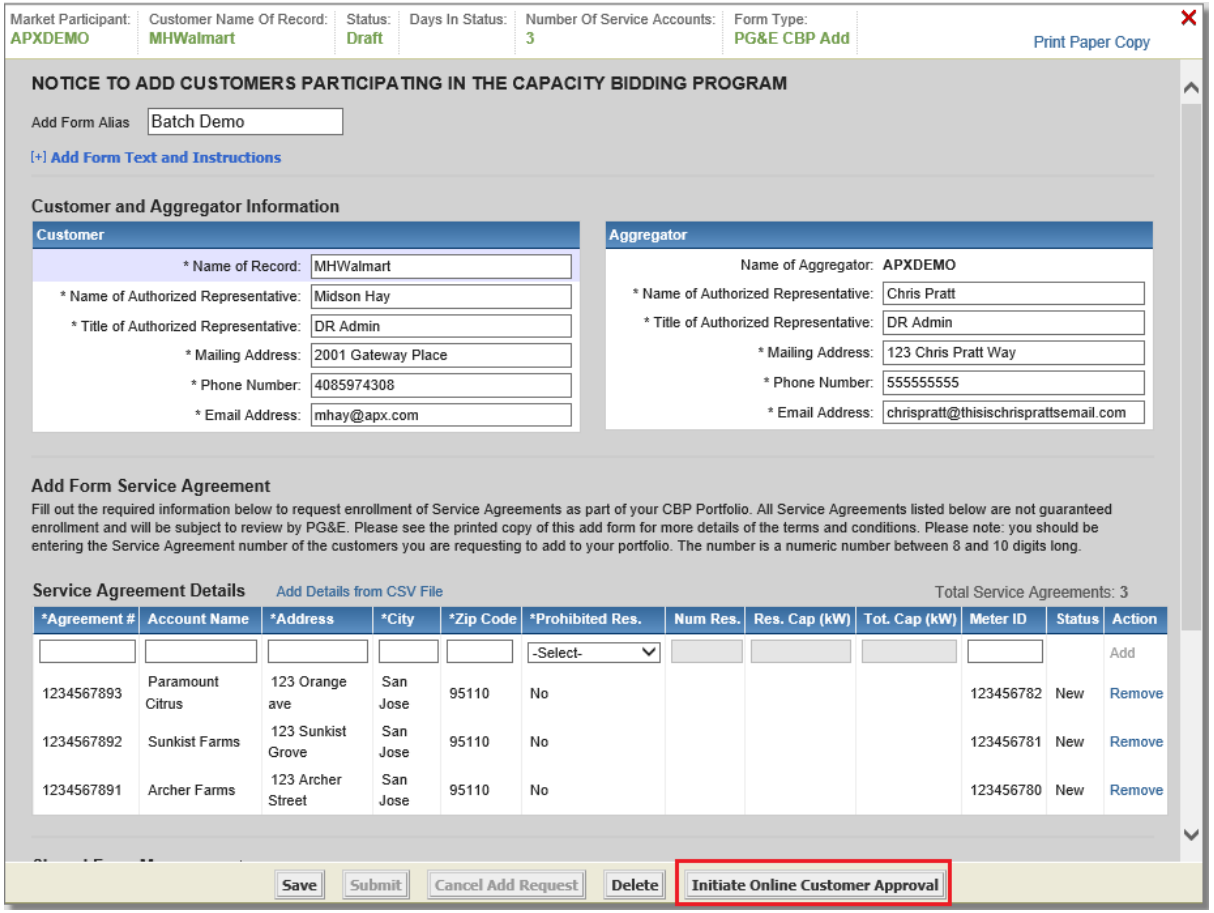
# Online Customer Approval

- Online approval module that facilitates end-use customers' review and approval of PG&E enrollment forms (i.e., Add, Delete, and Update forms) submitted by Aggregators.
    - Email notifications sent to end-use customers providing instructions for accessing, reviewing and approving enrollment forms. The link will expire after 3 days and can be re-sent by the aggregator.
    - Customer submits approval or rejection of the enrollment form via the online portal.
    - Email notifications sent to the end-use customers providing confirmation of their approval or rejection.
    - "Aggregator Enrollment Forms" report available to the Aggregators to review the status of the customer online approvals.

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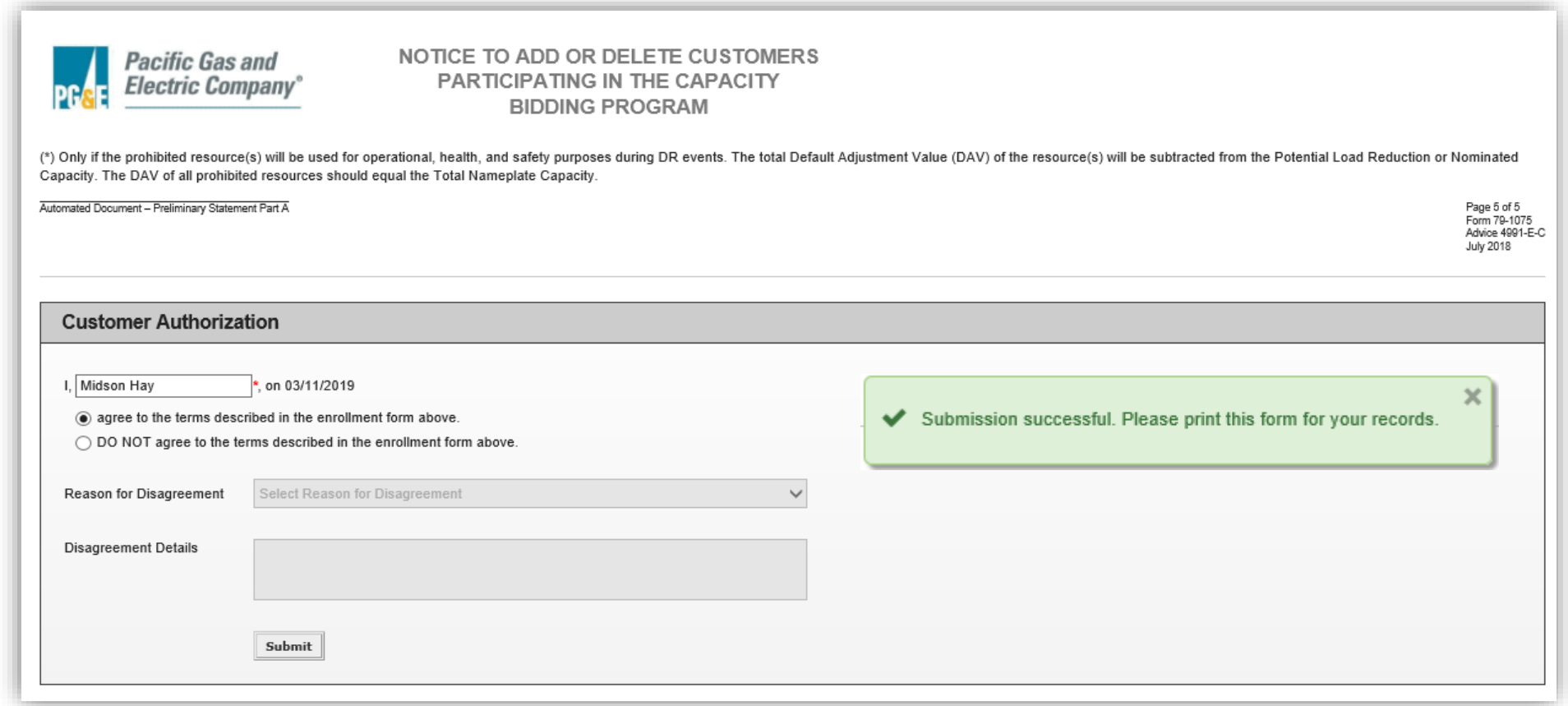
# Customer Approval (continued)

- When the customer opens the link it will open the enrollment form and they will be able approve or reject the form. Once an action is taken, they will receive confirmation.



Pacific Gas and Electric Company®

NOTICE TO ADD OR DELETE CUSTOMERS PARTICIPATING IN THE CAPACITY BIDDING PROGRAM

(*) Only if the prohibited resource(s) will be used for operational, health, and safety purposes during DR events. The total Default Adjustment Value (DAV) of the resource(s) will be subtracted from the Potential Load Reduction or Nominated Capacity. The DAV of all prohibited resources should equal the Total Nameplate Capacity.

Automated Document – Preliminary Statement Part A

Page 5 of 5
Form 79-1075
Advice 4991-E-C
July 2018

**Customer Authorization**

I, Midson Hay *, on 03/11/2019

- (•) agree to the terms described in the enrollment form above.
- ( ) DO NOT agree to the terms described in the enrollment form above.

Reason for Disagreement: Select Reason for Disagreement

Disagreement Details:

Submit

✔ Submission successful. Please print this form for your records.

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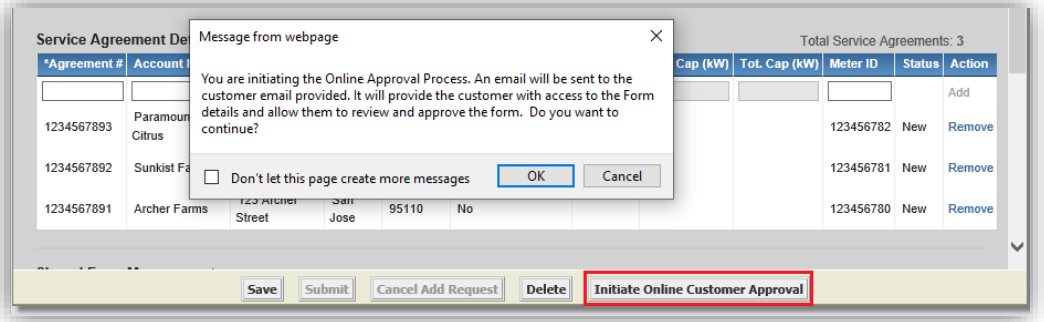
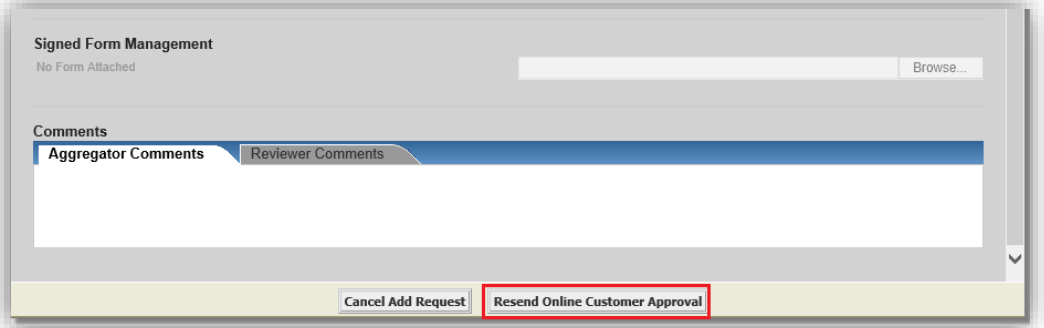
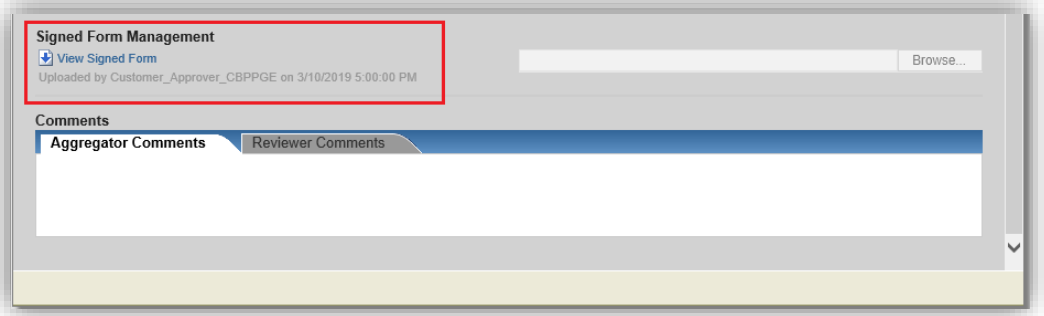
# Online Customer Approval (continued)

- When initiating an online approval you will be prompted to confirm this action
- If the link expires the link can be re-sent.
- When the customer approves the form, the signed form will show on the approved enrollment. *




*An approved enrollment does not mean the SA's are eligible.

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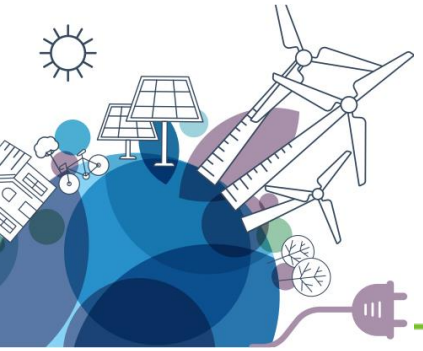

# Enrollment Batch Upload

The Enrollment Form Batch Upload functionality allows aggregators to create and/or update one or more enrollment forms simultaneously using a CSV file upload. The batch upload functionality supports all actions allowed via the User Interface(UI) except for uploading a signed document. Aggregators will need to manually upload signed documents or utilize the online approval process to complete/submit enrollment forms.

* APX also supports enrollment through API. The link below has information regarding the API.

https://pmdsmaggregatorapi.apx.com/swagger-ui.html#/

Steps

1. Download the "Aggregator Enrollment Forms" report as a CSV template
2. Update and save the CSV template with new enrollment information
3. Upload the CSV template into MarketSuite to batch create/update enrollment forms

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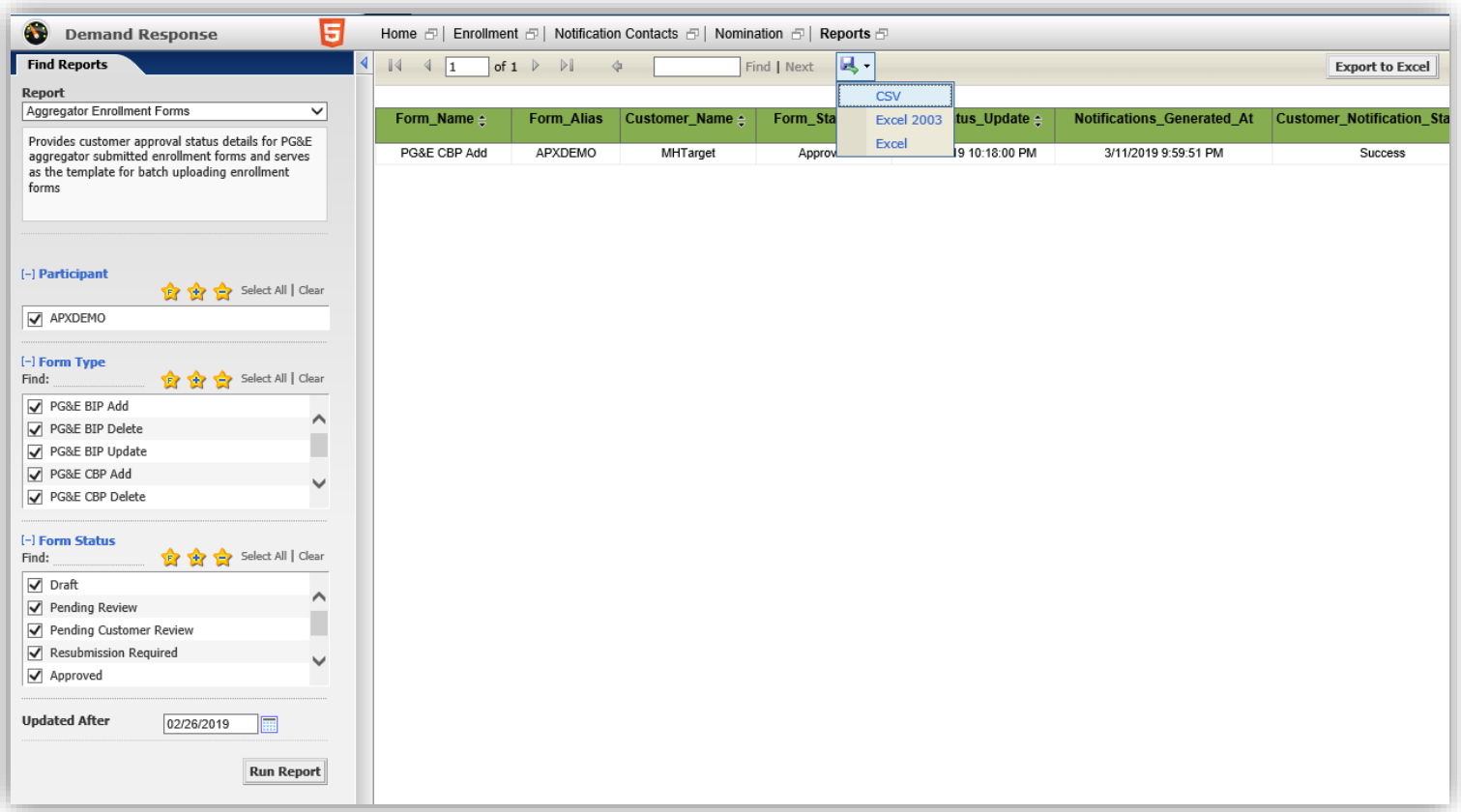
# Enrollment Batch Upload (continued)

1. Download the “Aggregator Enrollment Forms” report as a CSV template

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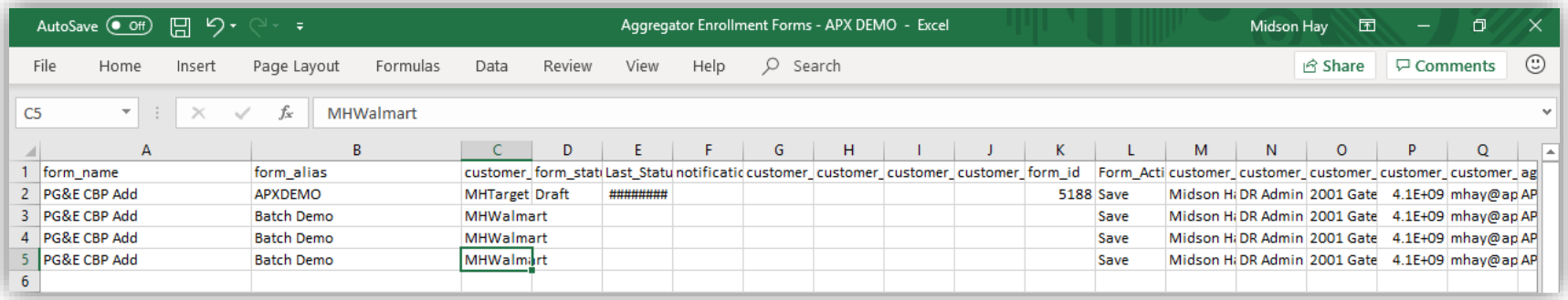
# Enrollment Batch Upload (continued)

2. Update and save the CSV template with new enrollment information




| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | form_name | form_alias | customer_ | form_stat | Last_Statu | notificatic | customer_ | customer_ | customer_ | customer_ | form_id | Form_Acti | customer_ | customer_ | customer_ | customer_ | customer_ |
| 2 | PG&E CBP Add | APXDEMO | MHTarget | Draft | ######## | | | | | | 5188 | Save | Midson Hi | DR Admin | 2001 Gate | 4.1E+09 | mhay@ap |
| 3 | PG&E CBP Add | Batch Demo | MHWalmart | | | | | | | | | Save | Midson Hi | DR Admin | 2001 Gate | 4.1E+09 | mhay@ap |
| 4 | PG&E CBP Add | Batch Demo | MHWalmart | | | | | | | | | Save | Midson Hi | DR Admin | 2001 Gate | 4.1E+09 | mhay@ap |
| 5 | PG&E CBP Add | Batch Demo | MHWalmart | | | | | | | | | Save | Midson Hi | DR Admin | 2001 Gate | 4.1E+09 | mhay@ap |
| 6 | | | | | | | | | | | | | | | | | |

- Details regarding business rules and required columns are in the MarketSuite Help Center https://marketsuitedr.zendesk.com/hc/en-us/articles/360043749994-Batch-Upload-of-Enrollment-Forms

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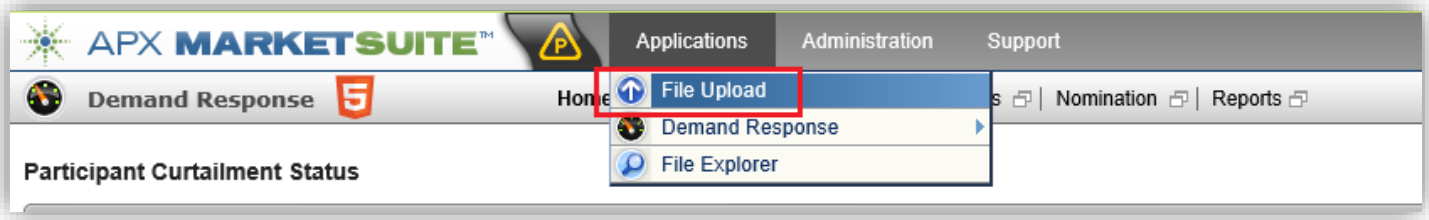
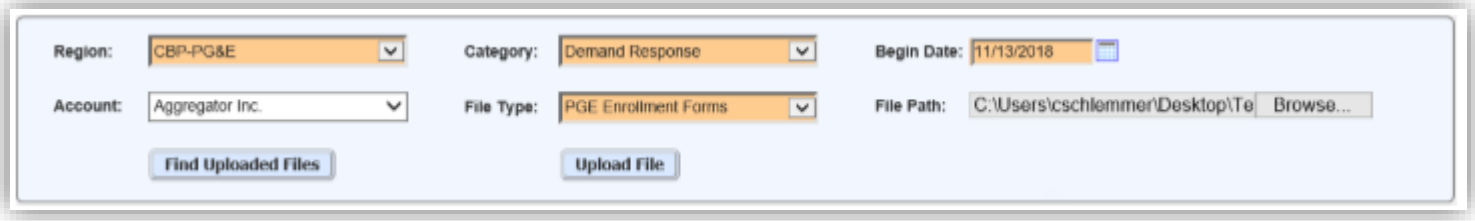
# Enrollment Batch Upload (continued)

## 3. Upload the CSV template into MarketSuite to batch upload/update enrollment forms

- Select **File Upload** from the **Applications** menu to access the File Upload UI. If you do not see the **File Upload** selection in the menu, please contact your APX program administration to add the appropriate rights to your login profile.




- The **File Upload** UI will be displayed with the upload parameters displayed across the top of the UI. Select **CBP-PG&E** as the **Region** for all PG&E form types. Select **Demand Response** as the **Category** and **PGE Enrollment Forms** as the **File Type**. The Begin Date is assigned to the file to allow you to find/view it again when pressing the Find Uploaded Files button. Otherwise the date selected is insignificant.

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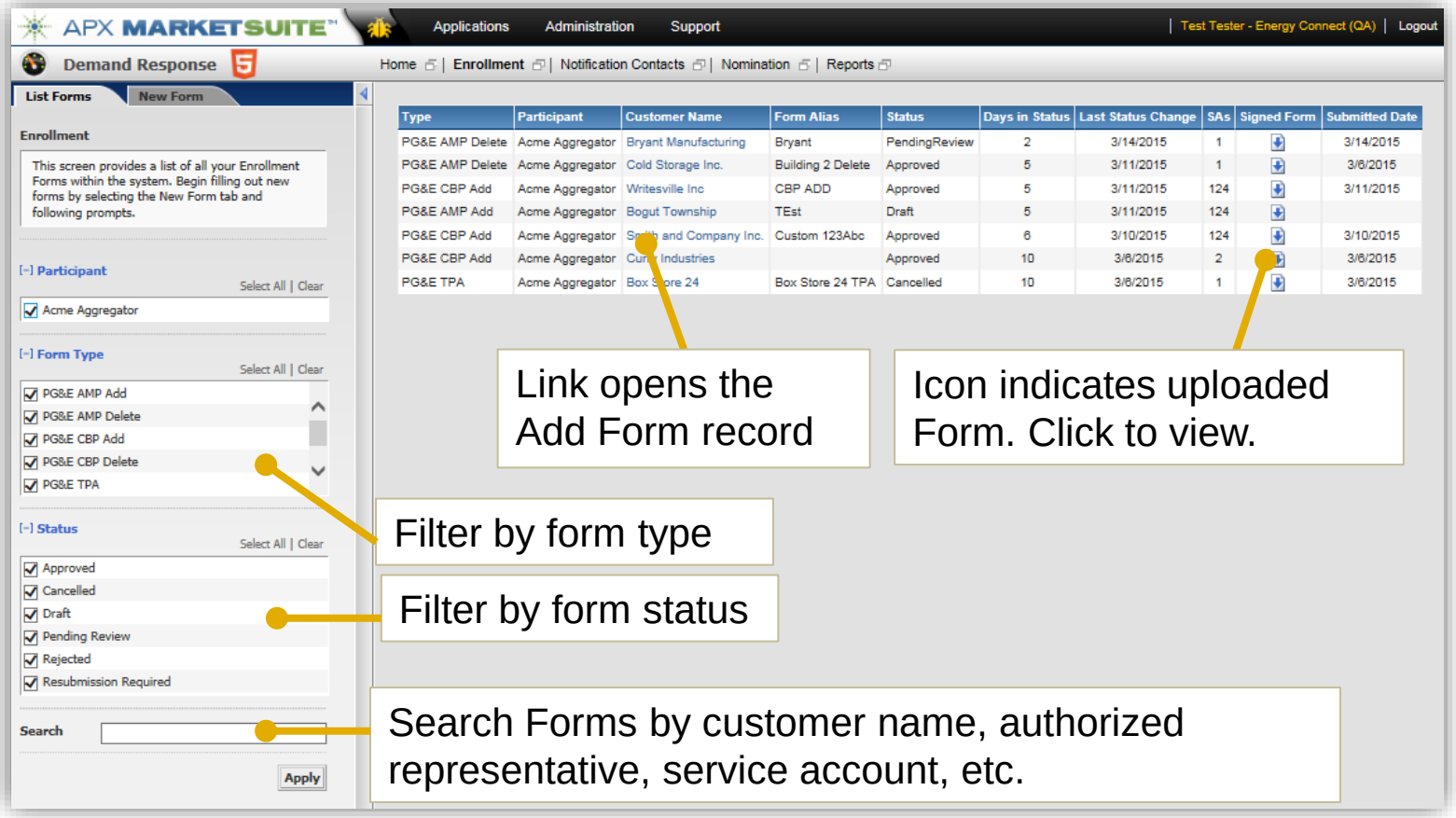
# Managing Forms

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# Managing Forms (continued)

Form Statuses

- **Draft** – Aggregator must complete and submit to PG&E for approval. (Editable)
- **Pending Review** – PG&E to review submitted form. (Cannot Edit)
- **Resubmission Required** – Indicates PG&E found an issue with the form that requires the aggregator to update the form and resubmit. (Editable)
- **Rejected** – Indicates the form has been rejected and will not be review any further. (Cannot Edit)
- **Cancelled** – Indicates the form submission was cancelled by the aggregator. (Cannot Edit)
- **Approved*** - Indicates the form has been approved. (Cannot Edit)
    - Approval of an Add Form does not indicate SA eligibility. The next step is an eligibility review of each SA.
    - When an Add approved, SAs will appear in the **Aggregator Enrollment Requests** report.
    - When a Delete form is approved, all SAs on the form will be marked for expiration with the later of today's date or the last day for which the SAs were nominated.

**For CBP-Res once the form is submitted it the form status will be automatically "Approved" and the service agreement will go through eligibility determination.*

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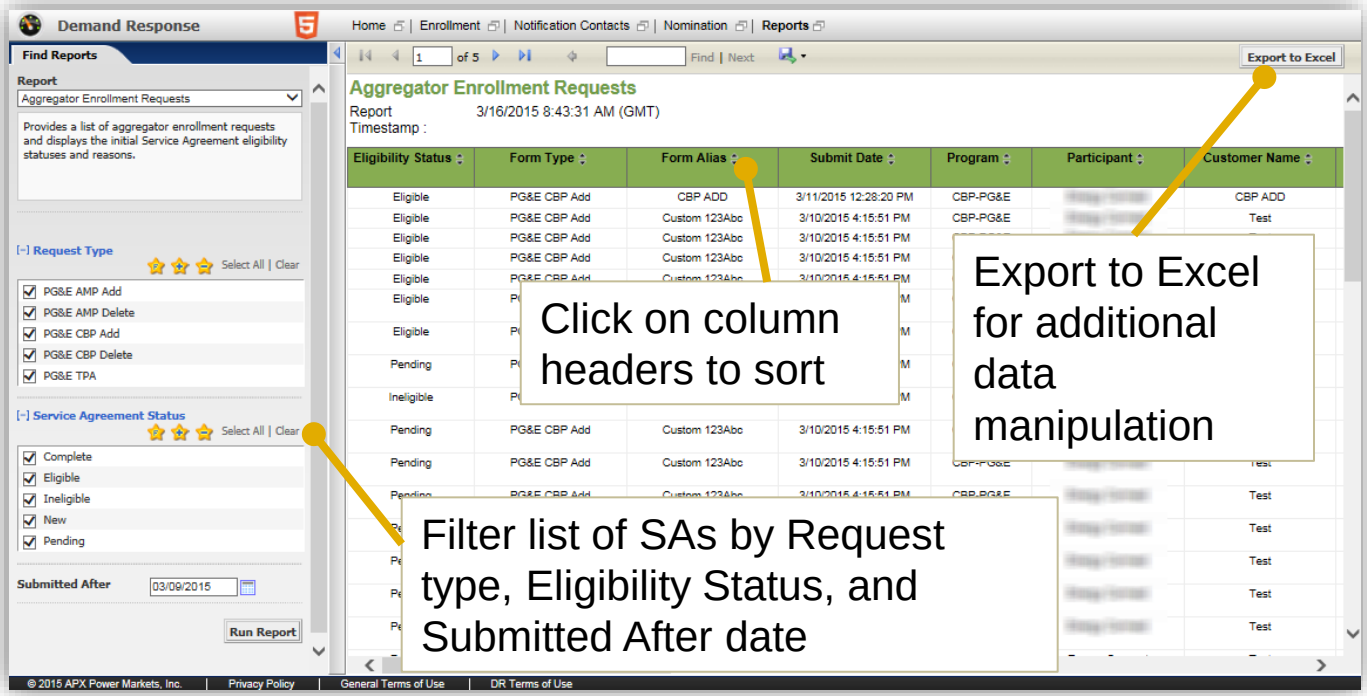
# Monitoring Service Agreement Registration

- Add Forms and the Aggregator Enrollment Request report display SA Eligibility status up to point of determination. Termination at a later date will not be reflected on the Add Form.
- Once an SA is determined to be Eligible by PG&E, it will be added to the aggregator's portfolio and available for nomination.
- The Aggregator Enrollment Request report is a snapshot at the time of enrollment and will become "stale".

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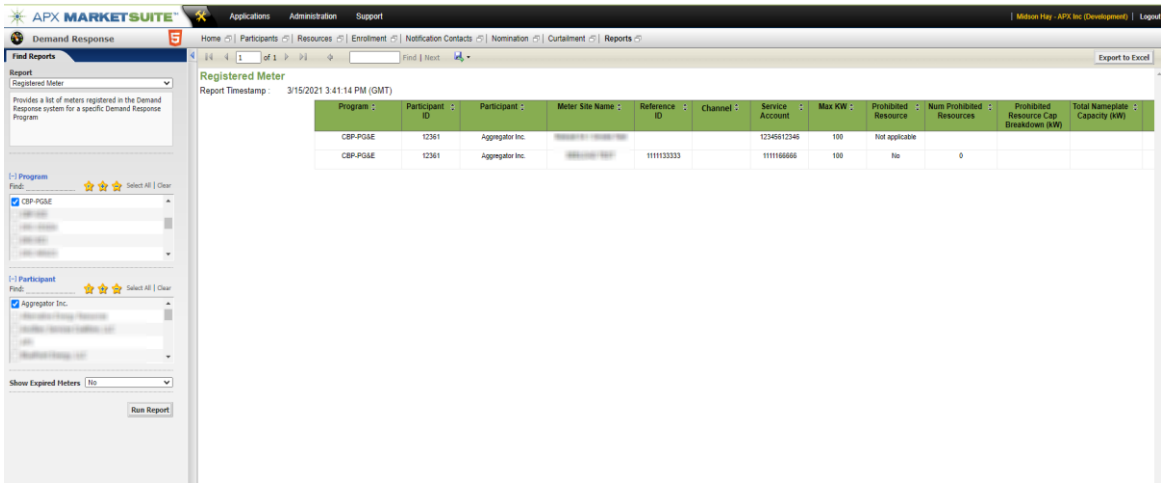
# Portfolio Management

Service Agreement data will be available to Aggregators through the Registered Meters report. Data includes

- LSE
- Location
- Max kW
- Alternate Name
- Store Number
- Account ID
- Old SA/Reference ID
- Channel
- Meter Site Service Address
- Meter Site City
- Meter Site Zip
- Rate Schedule
- Comments
- Etc.

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# DR Batch Nomination

## Nomination Verification Report

This report service two purposes: (1) verifying the current month's nominations and (2) serving as a template for the batch upload process. To download the report:

1. Go to Reports and select **Nomination Verification**
2. Once the selection criteria fields are selected, click the Run Report Button to populate the data pane
3. Download the Nomination Verification Report in **CSV (comma delimited)** format.

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# DR Batch Nomination (continued)

## Batch Nomination Upload

1. Service account data are pre-populated and do not need to be updated
2. Users must fill out the last 5 columns of the report: **Product, Baseline Option, Nominate, Monthly Portfolio Nomination MW, Tech Potential kW (Tracks expected reductions by SA)**
   - Baseline Options: "10/10 Baseline: No Adjustment", "10/10 Baseline: Day Of Adjustment (40% Cap)", "5/10 Residential Baseline: Day of Adjustment"
   - Columns are pre-populated if service account was nominated in the previous month
   - Must enter "Yes" for Nominate column
   - Monthly Portfolio Nomination must be the same for all portfolios, SUM of the portfolio.
3. Save the file as type CSV (comma delimited)

| S | T | U | V | W |
|---|---|---|---|---|
| product | baseline_option | nominate | monthly_portfolio_nomination_mw | tech_potential_kw |
| Elect DA 1-8 (11AM-7PM) | 10/10 Baseline: No Adjustment | yes | 3 | 3 |
| Elect DA 1-8 (1PM-9PM) | 10/10 Baseline: Day Of Adjustment (40% Cap) | yes | 4 | 4 |

https://marketsuitedr.zendesk.com/hc/en-us/articles/360044249153-SCE-and-PG-E-Utility-Program-Nominations

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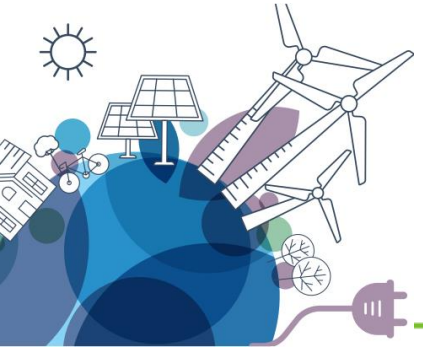

# DR Batch Nomination (continued)

## Portfolio Nominations by Product and Location

| Program | Location | Product | Load Type | LSE | SA ID | Nominated MW | Tech Potential kW | max_events_per_month | max_event_hours_per_month | max_event_days_in_sequence | External_id |
|---|---|---|---|---|---|---|---|---|---|---|---|
| CBP-PGE | SLAP_PGCC-APND | Prescribed DA 1-4 (1PM-9PM) | Direct Access Load | Company A | 123 | **.5** | 400 | | | | GroupA |
| CBP-PGE | SLAP_PGCC-APND | Prescribed DA 1-4 (1PM-9PM) | Bundled | Company C | XYZ | **.5** | 150 | | | | GroupA |
| CBP-PGE | SLAP_PGCC-APND | Prescribed DA 1-4 (1PM-9PM) | Direct Access Load | Company A | 789 | **1.0** | 120 | | | | GroupB |
| CBP-PGE | SLAP_PGCC-APND | Prescribed DA 1-4 (1PM-9PM) | Direct Access Load | Company B | EFG | **1.0** | 800 | | | | GroupB |
| CBP-PGE | SLAP_PGSI-APND | Elect Plus DA 1-24 (1AM-9PM) | Bundled | Company C | MNO | **2.9** | 2800 | 15 | 60 | 5 | |
| CBP-PGE | SLAP_PGSI-APND | Elect Plus DA 1-24 (1AM-9PM) | Bundled | Company C | 456 | **2.9** | 250 | 15 | 60 | 5 | |

*Three new columns to allow aggregators to set the maximum events and hours per month and maximum consecutive events at a resource/nomination level (not less than program defaults).

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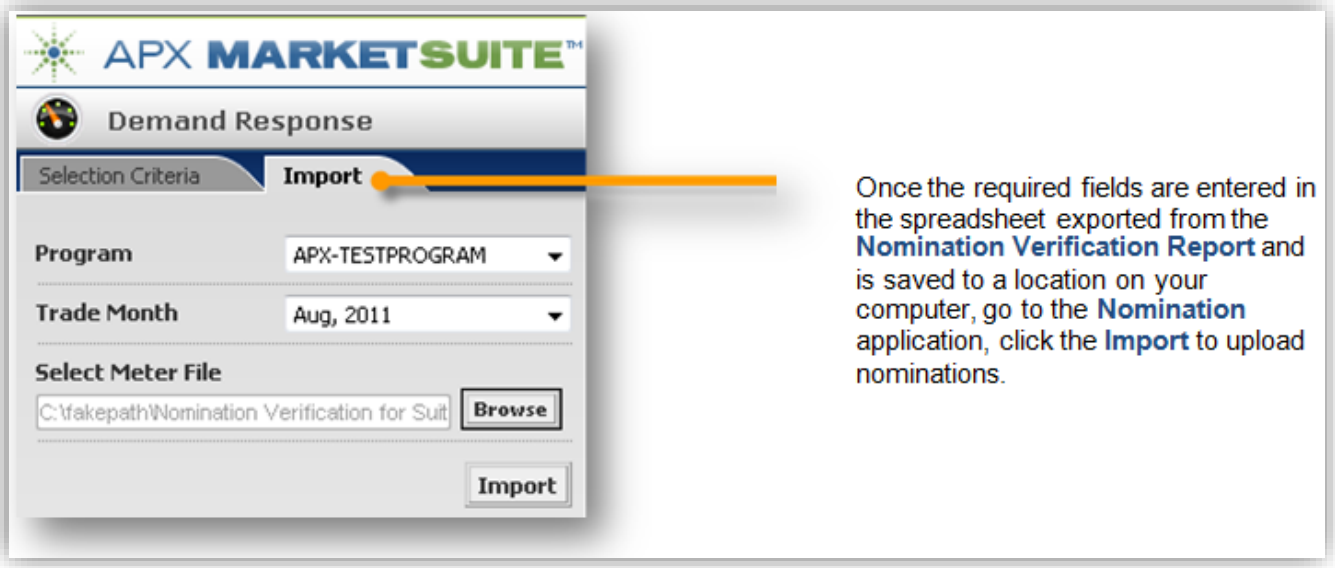
# DR Batch Nomination Upload

1. Review the Nomination Verification report
2. Identify service agreements to nominate to specific products
3. Identify nominated MW value for each portfolio
4. Upload the report to the Import tab on the Nominations Application

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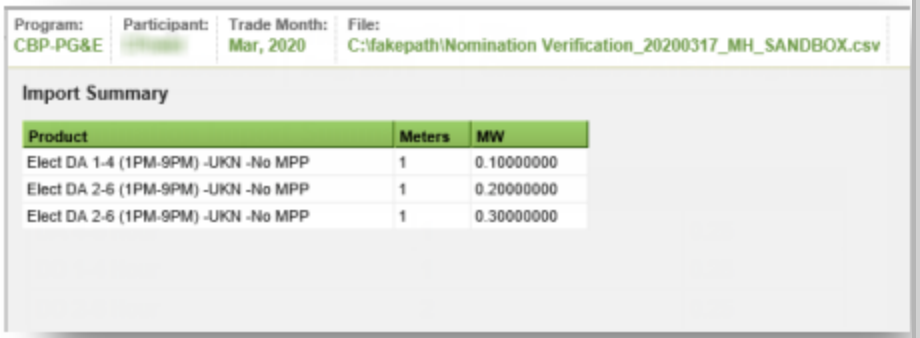
# Batch Nomination Upload (continued)

After nominations are uploaded successfully, the **Nomination Import Summary** summarizes results of the upload. If there are issues with the upload, an error message is displayed and user is required to update the file and re-upload.



| Program: | Participant: | Trade Month: | File: |
|---|---|---|---|
| CBP-PG&E | [redacted] | Mar, 2020 | C:\fakepath\Nomination Verification_20200317_MH_SANDBOX.csv |

Import Summary

| Product | Meters | MW |
|---|---|---|
| Elect DA 1-4 (1PM-9PM) -UKN -No MPP | 1 | 0.10000000 |
| Elect DA 2-6 (1PM-9PM) -UKN -No MPP | 1 | 0.20000000 |
| Elect DA 2-6 (1PM-9PM) -UKN -No MPP | 1 | 0.30000000 |

Note: Batch Nomination upload overwrites all previous nominations entered in for that nomination month

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# CAISO Bidding

- APX to capture aggregator bids for Elect and Elect +.
- Bidding Requirements
  - Bids for resource must be the same for entire day
  - Must bid for all program hours.
  - Additional Elect + bid hours must be contiguous
  - Bidding must be for the same MW as nominated
  - Bid price must be between the net benefit test (NBT) minimum and CAISO price ceiling ($1000)
  - NBT: http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=17B7B402-09C4-47B7-9EB3-ADA77F7C2085
- Steps to bid
  1. Download the "PGE Monthly Portfolio Bidding Template" report as a csv
  2. Enter in desired price and date ranges (daily if desired)
  3. Upload the template into MarketSuite
  4. Verify bids using the "PGE Portfolio Bidding".
     a) DRMI is submitting based on what is in APX. Status is updated by DRMI after submission to CAISO.

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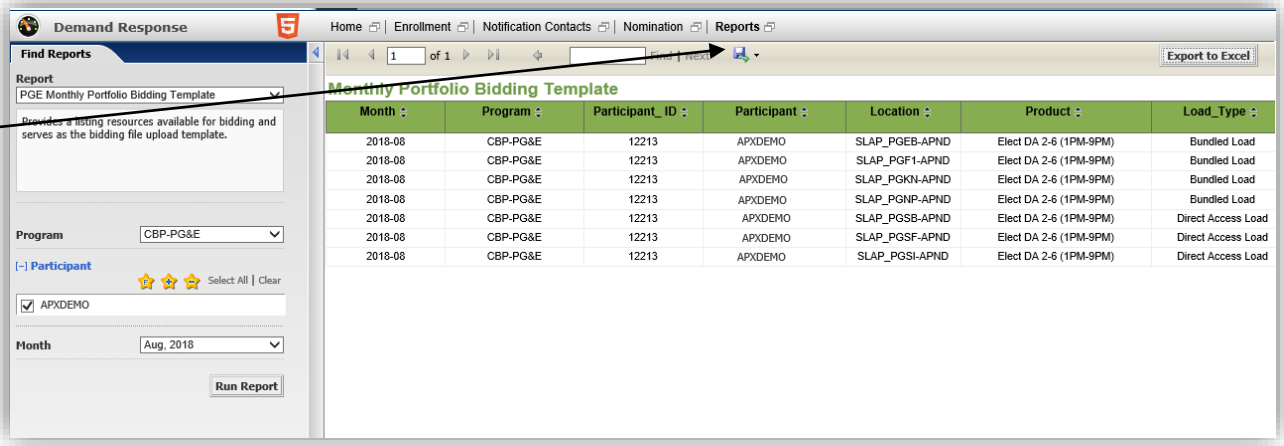
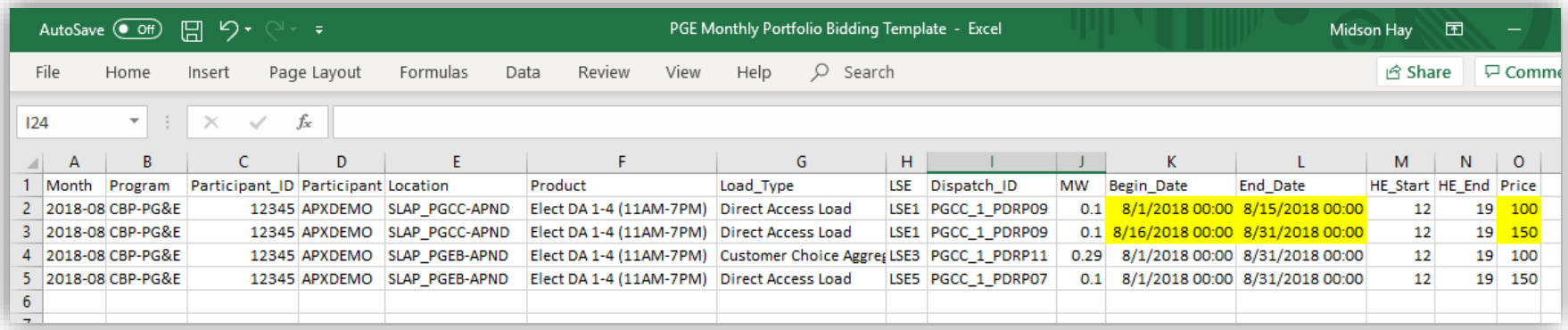
# CAISO Bidding (continued)

1. Download the "PGE Monthly Portfolio Bidding Template" report as a CSV.




2. Update bids via the CSV template

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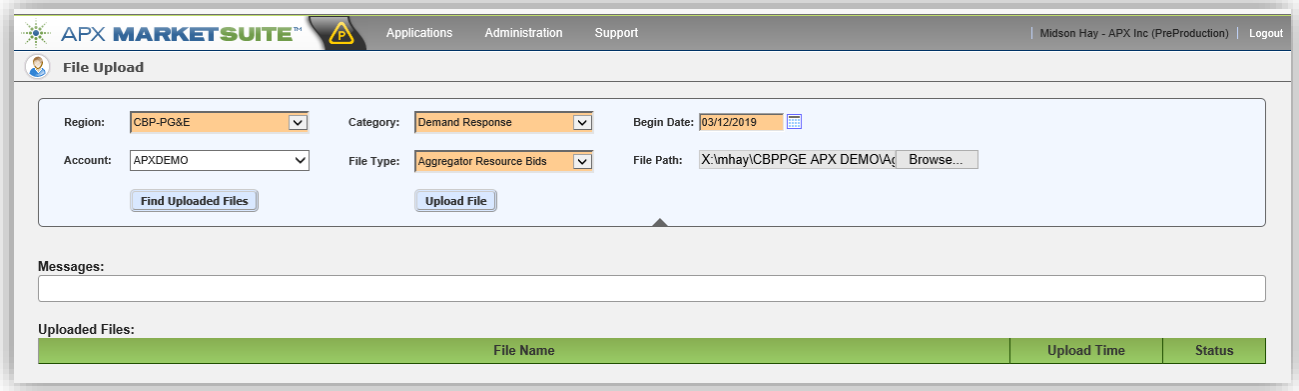
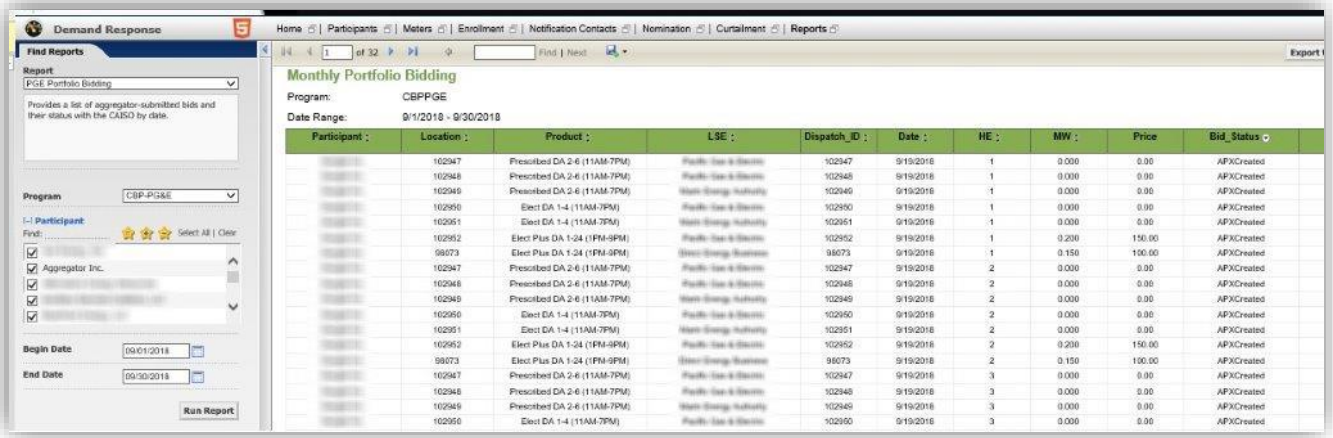
# CAISO Bidding (continued)

3. Upload bids into MarketSuite




4. Verify bids using the "PGE Portfolio Bidding".

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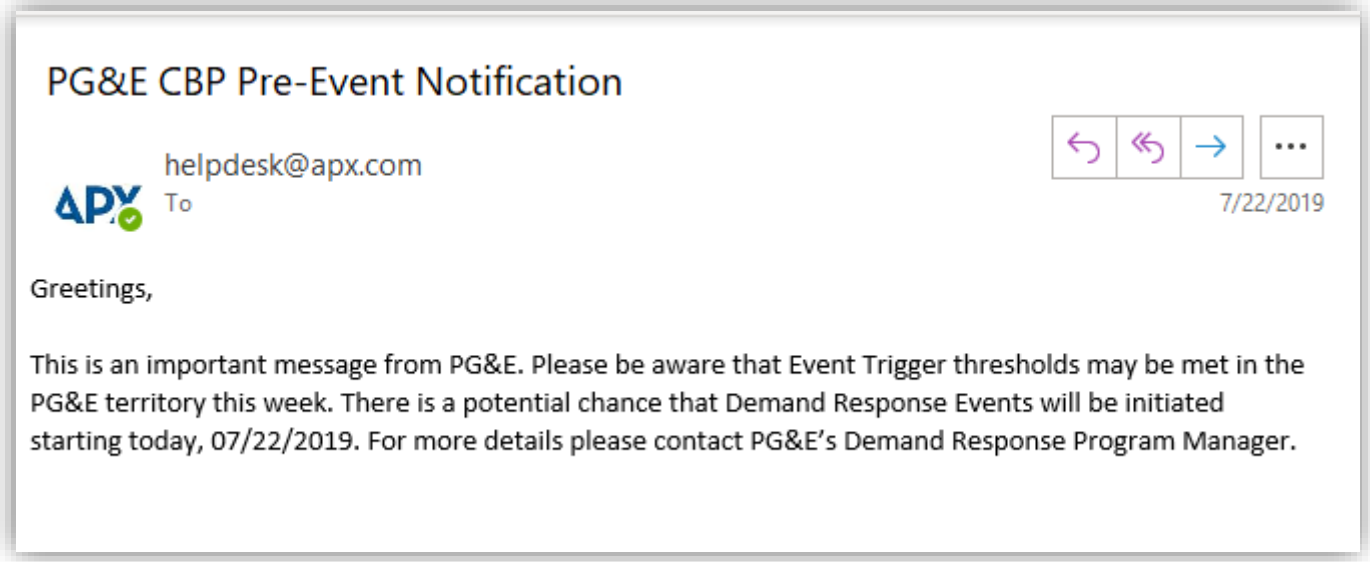
# Pre-Event Notification

- PG&E can send out pre-event notifications. PG&E is not obligated to send out these notifications, which will be sent out per their discretion.



PG&E CBP Pre-Event Notification

helpdesk@apx.com
To

7/22/2019

Greetings,

This is an important message from PG&E. Please be aware that Event Trigger thresholds may be met in the PG&E territory this week. There is a potential chance that Demand Response Events will be initiated starting today, 07/22/2019. For more details please contact PG&E's Demand Response Program Manager.

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# Event Dispatch

**From:** helpdesk@apx.com <helpdesk@apx.com>
**Sent:** Wednesday, February 3, 2021 12:51 PM
**Subject:** Pacific Gas & Electric CBP Event Called for 07/31/2020

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Urgent Instruction: Pacific Gas & Electric CBP Day Ahead Load Reduction event for 07/31/2020 has been initiated.

| Program | Curtailment Type | Location | Product | Dispatch ID | Total MW | Curtailed Hrs. | Total Hrs. |
|---|---|---|---|---|---|---|---|
| Pacific Gas & Electric CBP | Event | SLAP_PGNP-APND | Elect DA 1-4 (1PM-9PM) | PGNP_2_PDRP12 | 0.1000 | From 1900-2000 | 1 |

For additional dispatch information please contact APX at 408-517-2135 or visit https://marketsuitedr.apx.com/

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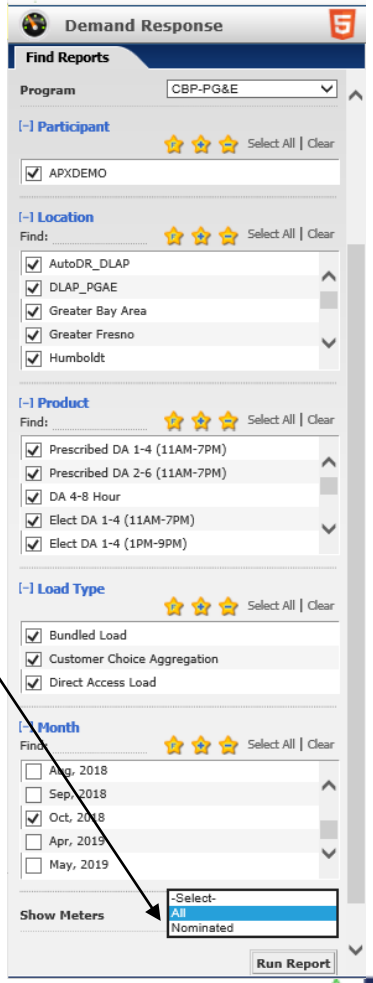
# Reports

- Aggregator Enrollment Forms
- Aggregator Enrollment Requests
- Meter Readings
  - Can elect to see data for all SAs or just nominated SAs (see image)
  - Should include estimated meter data within 2-3 days for most SAs
- Monthly Meter Nomination
- Monthly Portfolio Nomination
  - Verify nominations are correct
- MPP Events
  - New Report Identifying MPP events for SAs in your portfolio
- Nomination Verification
  - Used as the template for batch uploading nominations
- Notification Contacts
- Participant Curtailment History
- Program Curtailment History
- Settlement Statement Detail
- Settlement Statement Summary
- Service Account Performance
- ISO Prices

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# Monthly Settlement Process

## Meter Nominations

Monthly portfolio MW nominations are tracked by system
Portfolio designated by product and location

## Events

- DR system stores event details, e.g., product, date, hours, etc.

## Meter and Program Reporting

- PG&E provides meter data to the DR system (estimated data should be available for most meters within 2-3 days)
- APX to notify aggregators when settlement quality data is available
- MPP Events report identifies dual participation

## Settlement Calculations

- Baselines calculated using meter and dual participation data
- SA performance calculated using event day data, baseline adjustment and dual participation data

## Settlement Calculations Review and Validation

- APX to notify aggregators when calculations are ready for review and are published and are available to Aggregators and PG&E via DR system
- Aggregator to review and confirm settlement results with APX within 10 days from receipt of invoice

## Settlement Submission and Payment

- APX to submit Settlement Invoice on Aggregator's behalf to PG&E
- PG&E/Aggregator to pay invoice after approval.

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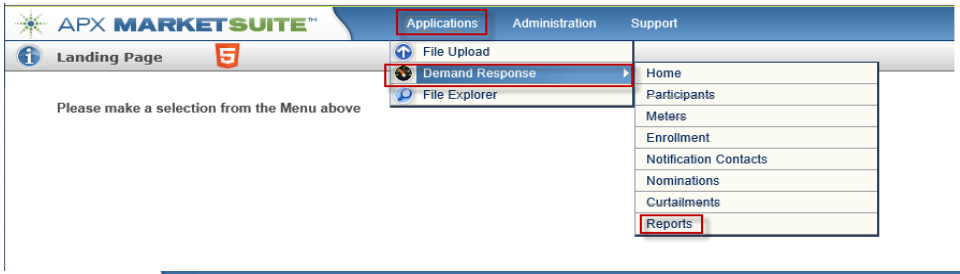
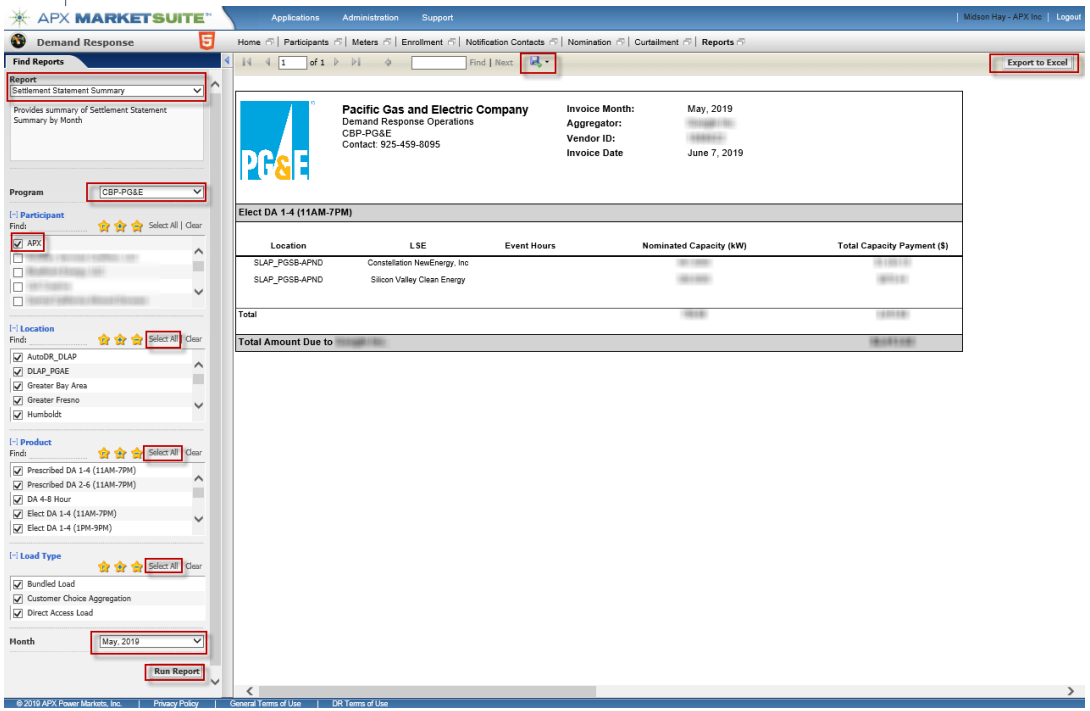
# CBP Settlement Invoices

1. **Applications > Demand Response > Reports**

2. **Select the "Settlement Statement Summary" report from the drop down and select the following criteria**
   - **a.** Program – CBP-PG&E
   - b. Participant – Defaulted your own
   - c. Location – Select All
   - d. Product – Select All
   - e. Load Type – Select All
   - f. Month - Select invoice month
   - g. Hit "Run Report"

3. **The reports can be downloaded using the "Export to Excel" button or the Save icon.**

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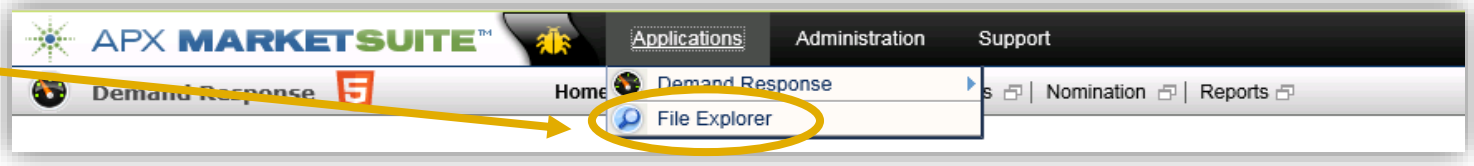
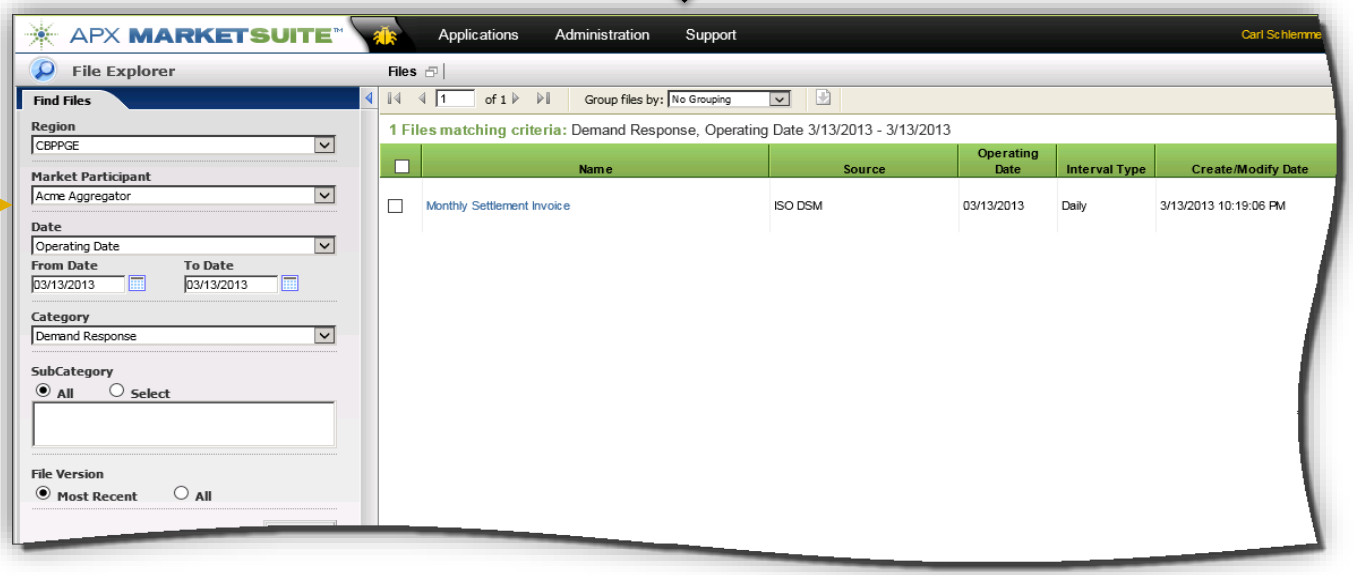
# BIP Settlement Invoices

Step 1 - Click Applications and File Explorer




Step 2 – Complete selection criteria

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# Next Steps

1. Have New Users Self-Register in APX Demand Response System
2. Review and update notification contacts
3. Run notification tests
4. Enroll resources in programs
5. Make Monthly Nominations
    - CBP Nomination window opens for the first 15 calendar days of the month.

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# Questions?

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