

JOINT UTILITIES OF NEW YORK

DISTRIBUTED SYSTEM PLATFORM (DSP) ENABLEMENT QUARTERLY NEWSLETTER

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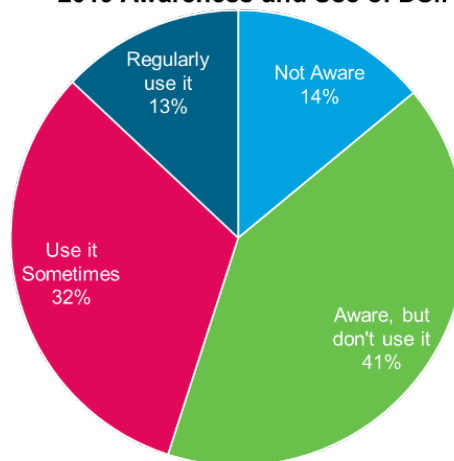
Distributed System Implementation Plans (DSIPs)

Every two years, each of the companies among the Joint Utilities of New York files a Distributed System Implementation Plans ("DSIPs"), an update on implementation of our Distributed System Platform ("DSP") functions and our overall approach to advancing the objectives of the Reforming the Energy Vision ("REV") Proceeding and other state goals, including the Climate Leadership and Protection Act ("CLCPA"). The 2020 DSIPs are available on the Joint Utilities [website here](#). As the next round of DSIP filings approaches in June of 2022, the companies are actively reaching out to stakeholders through a survey (see below), this newsletter, our upcoming biannual stakeholder webinar, and through stakeholder meetings on several DSP-related topics. We want to make sure that the DSIP filings are just one part of an interactive, ongoing conversation among utilities, stakeholders, and regulators about how we can work together to achieve state policy goals. As we begin the process of writing these filings, we strongly encourage stakeholders to send us feedback through any of these channels to help us to advance our thinking and to provide informative, useful documents.

Take a Ten-Minute Survey to Inform the Distributed System Implementation Plans (DSIPs)

The Joint Utilities are once again conducting a survey to learn more about how stakeholders are using the Distributed System Implementation Plans ("DSIPs"). In 2019, the Joint Utilities stakeholder survey provided valuable information that helped the companies to tailor their 2020 filings to stakeholder interests. For example, 4 out of 5 stakeholders said that DSIPs provided them with all of the information they needed, but 2/3 indicated that a more streamlined filing that focused more on changes since the last filing would be of greater use to them, since 41% of respondents were aware of the DSIP but were not using it. As a result, the 2020 DSIPs were updated to be shorter, include more dynamic information through active links, and provide more narrative focus on utility plans and timelines. The Joint Utilities want to continue to focus these filings to make sure that they include the most useful and relevant information for stakeholders. We want to hear from you! If you have not received a link for survey completion, please reach out to DSIPSurvey2021@icfsurvey.com. The survey takes less than ten minutes, and responses are kept confidential.

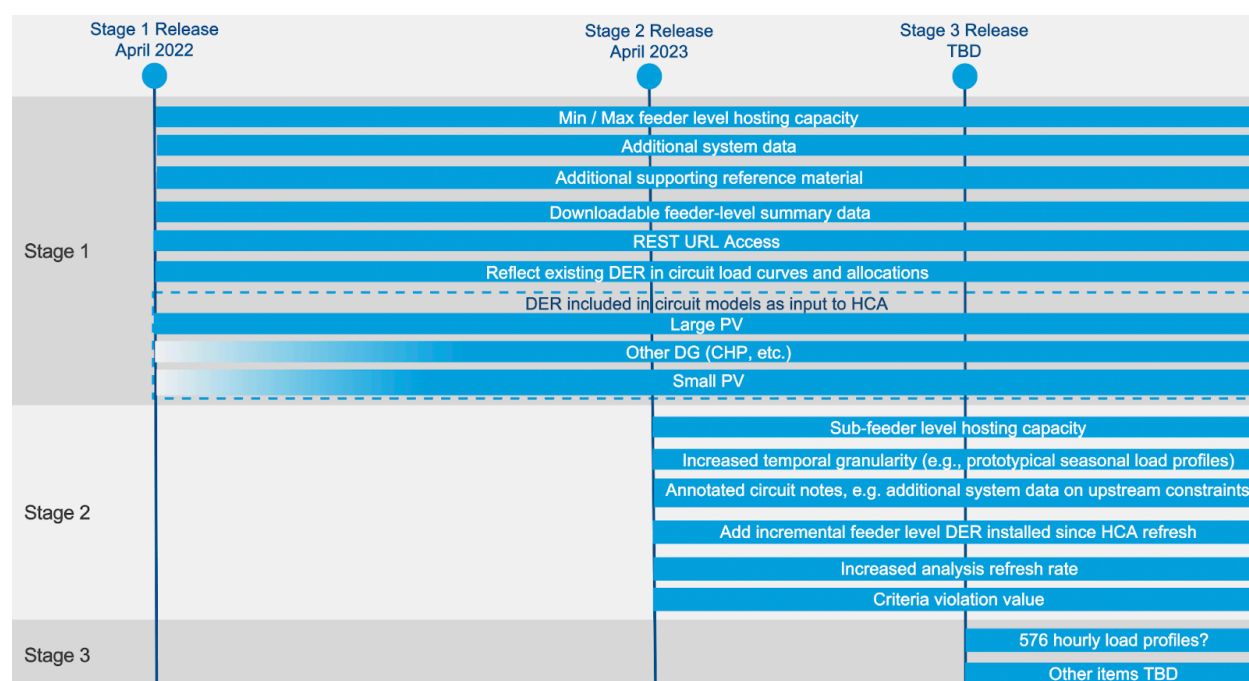
2019 Awareness and Use of DSIPs



Joint Utilities Use Stakeholder Feedback to Update the Hosting Capacity Roadmap

New Stakeholder Features Released for the Make-Ready Program

Over the past five years, the Joint Utilities have consistently worked with stakeholders to identify which hosting capacity features are most important to them and deliver progress on high priority enhancements. Most recently, the Joint Utilities held a stakeholder meeting in August to share a storage hosting capacity roadmap, solicit input from energy storage stakeholders, and discuss preliminary timelines and expectations for rollout. The Joint Utilities presented a draft plan showing that in Stage 1, the map would be at feeder-level, updated on an annual basis, allow for toggling between load and generation hosting capacity, and be released in April 2022. The roadmap timeline for storage hosting capacity was presented as follows.



Storage Hosting Capacity Timeline

Stakeholders were generally positive about the plan and indicated that several action items would be of value to them if they could be provided sooner. As a result, and based on this feedback, the Joint Utilities have modified their plans and will post sub-transmission circuits that are available to host distributed generation on their individual portals to help developers best evaluate options for storage connections. In addition, we will update newly connected storage monthly in a way that is consistent with PV generation and organize an EPRI presentation on voltage variability.

The Joint Utilities sincerely thanks all of the stakeholders who worked with us to give input and help us refine our plan in a way that would best meet their needs. This is the kind of collaboration that helps us to deliver more useful system data outputs and develop the DER marketplace more rapidly.

New Features in Alignment with the Cost Sharing 2.0 Order

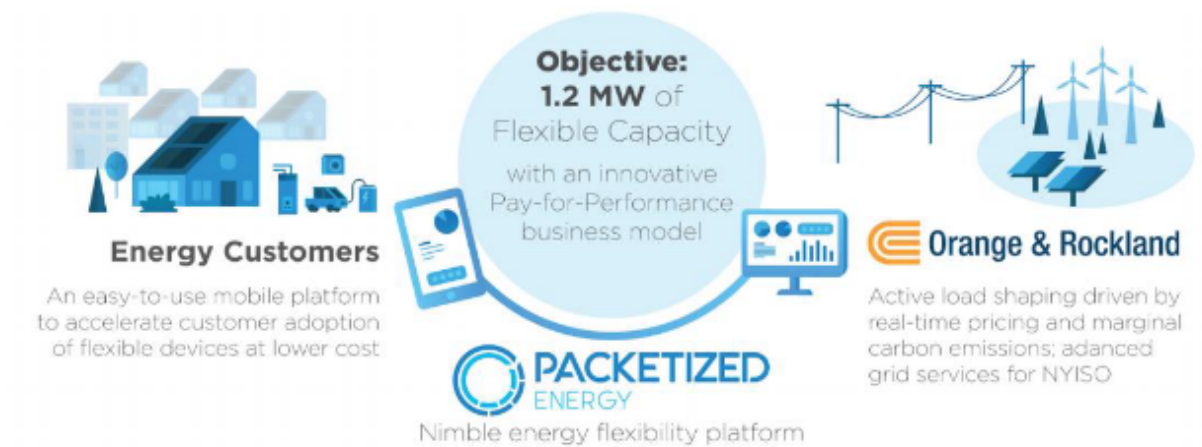
In addition, and pursuant to the Cost Sharing 2.0 Order in which the NY Public Service Commission adopted measures to allow advanced projects to share upgrade costs, the hosting capacity map will also show a planned upgrade's location, its anticipated impact in terms of capacity availability, the in-service date of the upgrade, and the known or estimated costs of that capacity. The cost sharing location will be shown at the substation-level. Currently, all substations are presented in the same color. In the future, cost sharing locations will be identified by a different color. All other cost-sharing information will be provided in a pull-down menu. Users will also have the ability to filter for all cost sharing jobs at the substation level.

Orange and Rockland Prepares to Launch Demand Response Demo Challenge

Demand response programs are integral to New York's clean energy and climate goals; they save energy and help integrate renewable energy onto the electric grid by providing increased stability and management of load. However, even as smart home appliances capable of responding to grid-signals increase in popularity, demand response programs often require customers to consciously change their behavior. As a result, these programs have historically been limited to a narrow pool of device types (e.g., smart thermostats), which are utilized for just a few hours per year during specific peak demand times. The impact to Customers' comfort level when participating in a demand response program should be minimized – this can improve program performance and increase the capacity of flexible load available to the Utility.

Response

Orange and Rockland (O&R) is excited to announce a new kind of demand response program. Approved by DPS Staff on September 20, 2021, the *Whole Home Optimization* project evaluates the extent to which an aggregated portfolio of smart devices can provide valuable grid services year-round without demanding significant behavioral changes or impacts to customer quality or service. For this demo, O&R will utilize *Nimble* – a cloud-based, grid-edge flexibility platform from Packetized Energy – to transform smart devices into resources that respond in real time to the grid's rapidly changing conditions. Load can be shifted away from high-price periods towards low-price periods, resulting in significant savings and providing additional grid services.



National Grid Receives Approval for Three-Year Rate Agreement

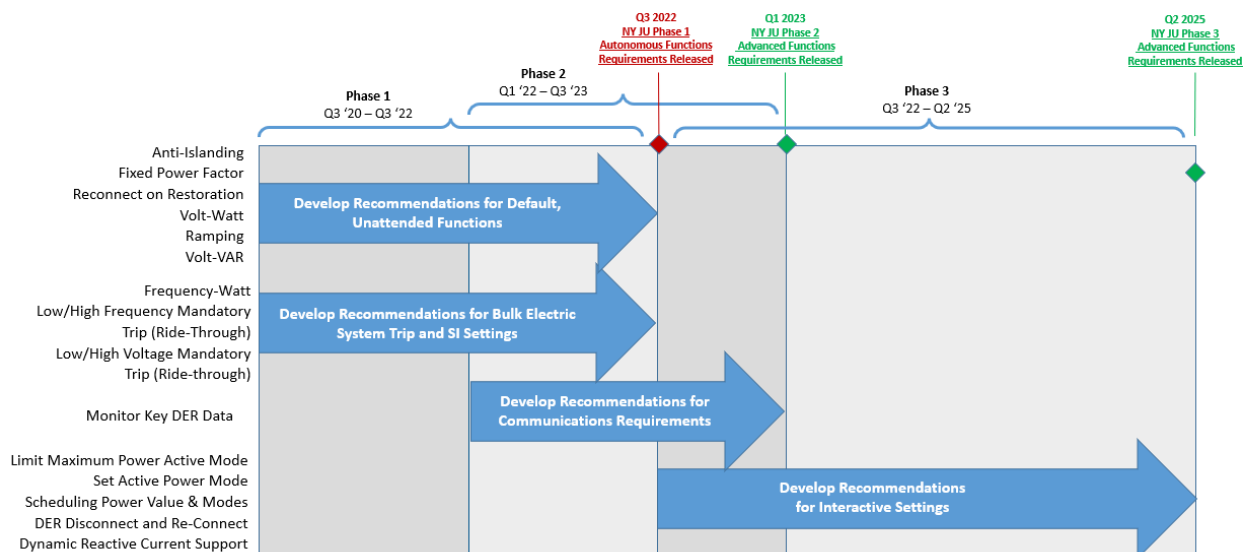
National Grid and other stakeholders - the Department of Public Service Staff, IBEW Local97, commercial and industrial customers, the New York Power Authority, and other parties – have codeveloped and submit a joint proposal to the New York Public Service Commission (PSC). If approved, National Grid will raise Upstate electric and gas rates roughly \$189 million over three years — increasing residential electric bills about 2% in each of the three years. Reflecting the input of a broad range of stakeholders, the three-year agreement minimizes bill impacts, enhances energy affordability programs, targets key infrastructure investments to promote a cleaner, more resilient energy delivery system and advances New York's renewable energy and emissions reductions goals. Benefits to customers include:

- Enhanced energy affordability programs and services.
- Historic investment in energy efficiency and demand response programs to help customers manage their energy use and bills, and New York and National Grid to deliver on their clean energy goals.
- Significant increases in additional clean energy solutions, including transmissions investments to unlock renewable energy, new non-pipes and non-wires alternatives, programs to promote heat pump and geothermal solutions, and initiatives and investments to support the deployment of electric vehicles.
- Continued deployment of economic development programs that support the upstate New York economy.
- \$3.3 billion in capital investments to improve the safety, resiliency and reliability of National Grid's energy networks that serve more than 1.6 million customers.

Smart Inverter Roadmap Progress Continues

As distributed energy resources (DERs) and renewable energy plants connect to the grid at increasing rates, both communication and computational systems face growing responsibilities and burdens. Smart inverters could help regulate voltage, absorb and inject reactive power, and provide ride-through capabilities. While the full risks and benefits of this emerging technology are still unknown, the Joint Utilities continue to test and roll out effective ways to utilize this technology via a three-part Smart Inverter Roadmap.

The Smart Inverter Roadmap activities provide a pathway for the utilities to achieve standardization of smart inverter settings to the extent practicable. Standardized settings across the Joint Utilities will be beneficial and result in time savings for device manufacturers and project developers, as inverter setpoints may not need modifications in the field. In the future, smart inverters may potentially also assist in DER monitoring and control activities, which may reduce the need for utility monitoring and control requirements.



With little less than half-a-year remaining to implement Phase 1 of the Smart Inverter Roadmap, the Joint Utilities provided a progress report to industry on October 13, 2021, regarding bulk power system (BPS) settings, voltage support functions and coordination with the NYISO. The Joint Utilities have achieved agreement on 80% of the BPS settings and 50% of the voltage support settings.

Updates to Monitoring and Control Requirements are Forthcoming New York's Standardized Interconnection Requirements

The Joint Utilities continue to work with stakeholders to finalize a new equation to study the voltage flicker impacts of solar PV projects. It is anticipated that adoption of the new equation will result in few projects failing *Screen H: Voltage Flicker Test* of the New York [Standardized Interconnection Requirements](#) (SIR). The new equation was proposed by Pterra Consulting, which is working with EPRI to finalize a scope of work and study to further inform the amendment process.

Monitoring and Control (M&C) Requirements

The Joint Utilities will soon finalize changes to the [M&C Requirements](#) document pursuant to modifications made to the SIR. For example, the scope of the SIR document is no longer narrowed to PV alone and now includes requirements for interconnection of DER more broadly. As such, M&C requirements must now account for DER size thresholds that trigger M&C.

The Joint Utilities Focus on FERC 2222 Integration

FERC Order No. 2222 allows for the aggregation and participation of DERs in regional wholesale electricity markets, paving the way for a more competitive, greener electricity industry. This historic order necessitates innovative preparation as utilities, regional grid operators and other actors collaborate to plan complex system changes. The Joint Utilities are excited to face this challenge and have already addressed many topics, including operational coordination, registration and enrollment, SD-WAN implementation, and metering and settlement. The Joint Utilities have:

- Commented on the NYISO's July 19, 2021, FERC 2222 Compliance Filing

- Presented to the NYISO several FERC 2222 implementation considerations, such as registration and enrollment studies, metering and settlement procedures, identification and remediation of risks, and communication and coordination between the DERA, Joint Utilities and NYISO
- Collaborated with the NYISO to identify aggregation data requirements
- Analyzed safety and reliability assessments and associated data requirements
- Prepared interactions with the NYISO's SD-WAN to facilitate the utility adoption process
- Partnered with the NYISO to develop an integrated FERC 2222 workflow
- Identified and communicated short-term metering and billing limitations to the NYISO in response to a deficiency letter filed on October 1, 2021, by the Commission.

The Joint Utilities Continue to Support Information Sharing to Achieve State Clean Energy Goals

Since 2017, the Joint Utilities have been engaging with stakeholders and DPS Staff to define the most useful information and data to support their projects. As a result, the Joint Utilities developed the [System Data Portal](#), which includes information such as historical and forecast load/DER, hosting capacity maps, non-wires alternatives (NWA) opportunities, reliability reports. In addition, the Joint Utilities, collectively and individually, have implemented different data access mechanisms to share aggregated and specific customer data, such as the utility energy registry (UER), whole building benchmarking portal, electronic data interchange (EDI), green button download, and green button connect (GBC).

The utilities are committed to continuously ensuring that the most relevant information is being shared with customers and developers in New York and are working collaboratively with NYSEDA, DPS Staff, and stakeholders to continue to define use-cases for data that can inform DER projects in support of CLCPA goals. The Joint Utilities are currently focused on being responsive to three data-related Orders in New York:

Data Access Framework (DAF)

On April 15, 2021, the NY Public Service Commission issued an [Order](#) adopting a Data Access Framework (DAF) that aims to standardize the necessary privacy, cybersecurity, and quality requirements for third parties to access specific energy data. The Joint Utilities are committed to work collaboratively with DPS Staff and stakeholders to identify risk-appropriate solutions to privacy and cybersecurity and support the implement the DAF and other related data initiatives. The DAF will be a critical piece of how third parties get certified to access data in the IEDR or other data access mechanisms.

In addition, and pursuant to clauses 2, 5 and 7 of the order respectively, the Joint Utilities filed with the Commission a Data Access Implementation Plan (DAIP), a Consent Process Assessment and Customer Engagement Plan, and a Green Button Connect User Agreement & Onboarding Process document. A summary of all DAF Order-related Joint Utilities filings is included in the table below.

DAF Order Filing	Ordering Clause	Due Date
Individual Utility Current Data Access Use Cases	No. 6	July 14, 2021
Joint Utilities Alternative Method of Account Identification	No. 4	July 14, 2021
Individual Utility Omitted Data Sets	No. 3	July 14, 2021
Joint Utilities Green Button Connect User Agreement & Onboarding	No. 7	August 13, 2021
Joint Utilities DAF Matrix Comments	-	August 20, 2021
Joint Utilities Data Access Implementation Plan (DAIP)	No. 2	September 13, 2021
Joint Utilities Consent Process Assessment and Customer Engagement Plan	No. 5	September 13, 2021

For more information regarding the data proceeding, visit: [Case 20-M-0082](#) Proceeding on Motion of the Public Service Commission Regarding Strategic Use of Energy Related Data.

Integrated Energy Data Resource (IEDR)

On February 11, 2021, the Commission issued an [Order](#) approving the design and implementation of a statewide Integrated Energy Data Resource (IEDR) platform to support New York's clean energy goals by enabling useful access to data. Phase 1 will enable the development of at least five priority data Use Cases over 24-30 months, while Phase 2 will enable 40+ additional data Use Cases over 30-36 months.

The Joint Utilities continue to collaborate with NYSERDA and DPS Staff, attending the Utility Coordination Group (UCG) monthly meetings and additional workshops to review the definitions of data elements within the IEDR Data Survey. Each utility is worked internally to fill the IEDR Data Survey and submitted results at the end of October.

On May 24, 2021, NYSERDA issued a [notice](#) inviting stakeholders to provide comments identifying, characterizing, and prioritizing a preliminary set of potential Use Cases for Phase 1 implementation of the IEDR.¹ The Joint Utilities and other stakeholders submitted IEDR Use Case comments on July 23, 2021. The [Joint Utilities proposed](#) Use Cases that would benefit stakeholders across New York State from their perspective, as noted by NYSERDA's instructions, but emphasized that the IEDR should prioritize Use Cases from developers and other stakeholders that maximize societal value. The next step is for NYSERDA, as the IEDR Program Sponsor, to guide the prioritization and selection of the Use Cases to move forward with Phase 1 of the IEDR design and implementation. On October 1, 2021, NYSERDA submitted an [updated](#) IEDR Program Sponsor Implementation Plan.

For more information regarding the data proceeding, visit: [Case 20-M-0082](#) Proceeding on Motion of the Public Service Commission Regarding Strategic Use of Energy Related Data or the [NYSERDA IEDR website](#).

¹ IEDR Proceeding, NYSERDA, Integrated Energy Data Resource (IEDR) Invitation to Stakeholders to Provide Comments Addressing the Identification and Prioritization of Use Cases (May 24, 2021).

Utility Energy Registry (UER)

On October 13, 2021, the Joint Utilities submitted individual [UER proposals](#) in accordance with Ordering Clauses N0. 2, 3, and 5 of the New York State Public Service Commission's August 12, 2021, Order adopting utility energy registry modifications. The Joint Utilities will continue to participate in the UER Working Group and coordinate with the other utilities to prepare the modifications to the UER semi-annual reports.

For more information regarding the UER proceeding, visit: Case [17-M-0315](#) In the Matter of the Utility Energy Registry and the [NYSERDA UER portal](#).

Stakeholders Join Electric Vehicle (EV) Deployment Efforts

Managed Charging Public Comments

In September, stakeholders submitted public comments in response to each of the Joint Utilities' proposed Mass Market Managed Charging Pilots. The proposals outlined each utility's approach to piloting a comprehensive managed charging program for residential EV owners that may consider both passive and active features designed to encourage and optimize off-peak charging of light-duty EVs. The proposals were presented in March during a Technical Conference with DPS Staff and stakeholders. Public comments and the utility filings can be [found here](#).

EV Load and Infrastructure Forecasts

Stakeholders will be invited to participate in an upcoming Technical Conference in December regarding the EV Load and Infrastructure Forecasts developed by each Joint Utility company. Per the July 2020 Make-Ready Order, stakeholders are welcome to provide feedback that can inform the forecasting process in the future, including new proposed program requirements to be considered during the midpoint review. The Technical Conference will be hosted via webinar and stakeholders can find registration information on the [DPS website](#) once a date has been determined.

NYSERDA Charge Ready New York Incentives

In addition to the utility make-ready incentives, EV customers in New York State have been able to take advantage of complementary EV charging equipment incentives through the Charge Ready NY program administered by NYSERDA. As of September 2021, the funding for that incentive program has been exhausted. Customers who plan to install EV charging can contact their utility directly to discuss the implementation of EV charging projects under the MRP with or without Charge Ready NY funding.

Approved Contractor and Customer Resources

The Joint Utilities makes available resources that will help customers and contractors get useful information faster and participate in the Make-Ready Program more easily. Customers looking to install EV charging stations through the MRP can find information on the Joint Utilities website regarding [program eligibility](#) and find an [Approved Contractor](#). Contractors looking to perform EV charging equipment installations under the MRP can [apply to become an Approved Contractor](#) and have their business information listed on the Joint Utilities website.

For more information on how to participate in the MRP, contact info@jointutilitiesofny.org or visit your utility's MRP landing page listed below.

Utility	Email	Website
Central Hudson	EVMakeready@cenhud.com	Electric Vehicle Make-Ready Infrastructure Program
Con Edison	EVMRP@coned.com	Electric Vehicle PowerReady Program
National Grid	EVNationalGridUNY@nationalgrid.com	Electric Vehicle Charging Station Programs
NYSEG	EVPrograms@nyseg.com	Electric Vehicle Charger Make-Ready Program
RG&E	EVPrograms@rge.com	Electric Vehicle Charger Make-Ready Program
Orange and Rockland	ev@oru.com	Electric Vehicle Make-Ready Program



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