



Generator Survey System in Ask ISO User Guide

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Introduction

ISO New England (ISO-NE) uses the Ask ISO survey platform to collect survey data from generating resources, as governed by [ISO-NE Operating Procedure No. 21](#) (OP-21): Operational Surveys, Energy Forecasting & Reporting and Actions During an Energy Emergency. OP-21 describes two surveys required for generating resources: the weekly/bi-weekly Fuel Inventory and Emissions Survey and the annual Winter Readiness Survey. Both surveys are administered via the Ask ISO survey platform.

In 2021, ISO-NE began using the Ask ISO survey platform to collect survey responses, replacing the previous system of emailed spreadsheets. In 2023, ISO-NE updated the appearance of both survey forms, but both continue to use the Ask ISO survey platform.

Gaining Access to the Survey Platform

Access to the Ask ISO survey platform is controlled by CAMS app groups, which are managed by your company's Security Administrator(s). There are two CAMS app groups relevant to survey access:

- Survey Submitter: allows the individual to view, edit, and submit surveys for your company.
- Survey Viewer: allows the individual to view previously submitted surveys for your company.

Contact your company's Security Administrator(s) to have one of these app groups added to your account in CAMS. If you do not know who your company's Security Administrator(s) are, please contact [ISO-NE Participant Support](#).

You must be able log into your Ask ISO account in order to access the survey platform. For more details about accessing the Ask ISO website in general, please review the [Ask ISO User Guide](#).

Accessing Your Surveys

To access your company's surveys (both unsubmitted and previous submissions), log onto the Ask ISO website at <https://askiso.iso-ne.com> using the Login link in the top right corner. After your company's Security Administrator has given you Survey Submitter or Survey Viewer access, a new tab called "My Surveys" will be available in the top menu bar. Click this "My Surveys" tab to enter the survey platform.

The screenshot shows the Ask ISO website interface. At the top, there is a search bar and a navigation menu. The 'MY SURVEYS' tab is highlighted in the navigation menu. Below the navigation menu, there is a section for 'Surveys' with a 'Surveys Open' button. A table of surveys is displayed, showing one survey: SVY-0000, Generator Survey, due 10/17/2023, with a 'Launch Survey' link.

Survey Number	Type	Due Date	Survey Link	Status	LMP Name	Survey Date
1 SVY-0000	Generator Survey	10/17/2023	Launch Survey	New	Example Company (00000)	10/16/2023

The survey platform displays different lists of your surveys. You can switch between the following list views by clicking the triangle to the right of the list name:

- Surveys Open: lists surveys that are currently accepting submissions
- Surveys Closed: lists surveys that are no longer accepting submissions
- Recently Viewed: lists surveys you've recently viewed

The default (pinned) list is “Recently Viewed” surveys. You may wish to change the pinned list to “Surveys Open” by selecting “Surveys Open” and clicking the pin icon next to the list name, so you can quickly see which surveys are available for submission or resubmission.

The screenshot shows the 'Ask ISO' header with a search bar and navigation tabs. The 'MY SURVEYS' tab is active, showing a list of surveys under the 'Surveys Open' view. The list contains one item: a 'Generator Survey' with ID 'SVY-0000', due date '10/17/2023', and status 'New'. The 'Launch Survey' link is highlighted with a red box.

Survey Number	Type	Due Date	Survey Link	Status	LMP Name	Survey Date
1 SVY-0000	Generator Survey	10/17/2023	Launch Survey	New	Example Company (00000)	10/16/2023

Click on the “Launch Survey” hyperlink to open the survey form for a specific survey.

This screenshot is similar to the previous one, but with the 'Launch Survey' link and the 'New' status highlighted with red boxes to draw attention to them.

Survey Number	Type	Due Date	Survey Link	Status	LMP Name	Survey Date
1 SVY-0000	Generator Survey	10/17/2023	Launch Survey	New	Example Company (00000)	10/16/2023

Within the survey list, a status of “New” indicates that no submissions have been received for this survey, for that company. Even if the status is “Submitted”, you can edit your responses by re-submitting as long as the survey remains open.

Viewing Previous Surveys

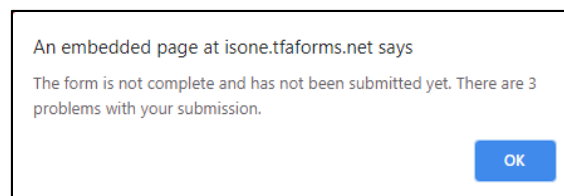
To view previously submitted survey responses, navigate to the “My Surveys” tab on the Ask ISO website and select the “Surveys Closed” list view. Click the “Launch Survey” link for the desired survey, which will open the form with the submitted responses filled in. You will not be able to edit responses after the survey closes. This option will remain for at least seven years, in accordance with ISO-NE document retention policy.

Submitting a Survey

Open the survey form and fill it out with accurate and up-to-date information. As a courtesy, ISO-NE prefills most questions with your responses from the previous survey. It is your responsibility to update all questions with the most recently available information.

Once the form is filled out, click the “Submit” button at the bottom of the page, which will immediately submit your responses. If the “Submit” button is greyed out, there is an issue with your responses (e.g. fuel inventory exceeds maximum fuel inventory) or you are not permitted to submit a response, either because you do not have submitter permissions or because the survey is no longer accepting submissions.

When clicking the “Submit” button, you may receive an error pop-up saying “The form is not complete and has not been submitted yet. There are ___ problems with your submission.” This indicates you did not provide an answer to all required questions (marked by a red asterisk), or you entered non-numeric characters in a numeric field. Finish filling out all required questions and try the “Submit” button again.



Once the survey is successfully submitted, you will receive an email confirmation with a PDF attachment of the submitted responses. The survey status will also change to “Submitted” on the “My Surveys” tab on the Ask ISO website.

Revising a Survey

After submitting a survey, you can still revise your responses. All surveys are due at the date and time specified in the survey notification email (typically 10:00AM ET on the due date), but the survey platform will allow you to re-submit until the survey stops accepting responses, typically a day after the survey due date.

To revise your survey, access the survey using the same “Launch Survey” link. Your previous submission responses will be pre-filled, so you only need to edit the values you wish to change. Click the “Submit” button as usual. You will receive a new confirmation email with the revised responses in an attached PDF.

Notification Emails

When ISO-NE requests a new survey from a generating resource, all individuals associated with that resource's company who are also assigned the Survey Submitter app group in CAMS will receive an email notification. This email notification will include the survey due date and a direct link to the survey.

Duncan Leathrum dleathrum@iso-ne.com [via y4w64ucme8nwt.01-8ak1eaa.cs194.bnc.sandbox.salesforce.com](#)
to me ▼
Dear John Doe

Please submit 2021-5-24 Generator Survey to ISO-NE using the following link no later than May 24, 2021
<https://isobat-askiso.cs194.force.com/s/generator-survey?id=a1L0100000461PJ>

Leading up to the survey due date, reminder emails will also be sent to any company that has not yet submitted their survey. If you receive a reminder email for a survey that you already submitted, there was an issue and ISO-NE has not received your submission yet. Please see the [Frequently Asked Questions section](#) for help troubleshooting.

Each company (Lead Market Participant) will receive a single survey for all generating resources assigned to that Lead Market Participant. If you are a submitter for multiple Lead Market Participants, you will receive survey notifications and reminders for each Lead Market Participant.

Survey notifications and reminders will always come from an ISO-NE email address (@iso-ne.com), but the specific ISO-NE sender may change to different ISO-NE employees. If you are not comfortable clicking links in external emails, you can always access your surveys from the "My Surveys" tab on your Ask ISO webpage.

Response Validation on Fuel and Emissions Surveys

The weekly/bi-weekly Fuel and Emissions Survey form now includes additional validation logic, to help catch typos and mistakes before submitting a survey. Not all generating resource types will see the questions referenced here. The following subsections show how the form will catch common mistakes.

Fuel inventory exceeds maximum fuel capacity

Survey submission is disabled when any station's current fuel inventory exceeds that station's maximum fuel capacity.

Fuel levels

ERROR: Current inventory cannot exceed maximum capacity.

Current usable inventory: * gallons *(do not reduce because of emissions or generator outages)*

Maximum usable storage capacity: * gallons *(do not reduce because of emissions or generator outages)*

Maximum fuel capacity changed

When the maximum fuel capacity changes from the previous survey, a short explanation is required. You cannot directly revise the previous survey's maximum fuel capacity, but you can explain what the value should have been in this explanation question.

Fuel levels

Current usable inventory: * gallons *(do not reduce because of emissions or generator outages)*

Maximum usable storage capacity: * gallons *(do not reduce because of emissions or generator outages)*

Previous survey's maximum capacity: 43500 gallons *(not editable)*

Please explain why the maximum capacity changed from the previous survey. *

Quick check: inventory change vs. burn

This section summarizes the fuel inventory change since the previous survey, based on your responses to previous questions on the survey. When the fuel inventory drops significantly more than the station's burn, or when the fuel inventory increases by a significant amount, a short explanation is required.

Quick check: inventory change vs. burn

The values in this section are automatically filled based on your responses in previous sections.
To edit the values here, please change your responses in previous sections.

Inventory on last survey:	1500	gallons (not editable)
Sum of all generator burns since last survey:	- 100	gallons (edit above)
Implied replenishment:	+ -400	gallons (calculated from other values)
Inventory on current survey:	= 1000	gallons (edit above)

WARNING: The current inventory is much lower or much higher than expected -- see implied replenishment.

Please review your current inventory and generator burn responses, then explain.

Please explain the missing or extra fuel (required): *

Received a delivery of __ gallons, sold inventory, mistake in inventory or burn on last survey, etc.

You cannot directly revise the previous survey's inventory or generator burns, but you can explain what the value(s) should have been in this explanation question.

Small inventory fluctuations do not require explanation: inventory drops up to 5% and inventory increases up to 20% will not prompt additional explanation, although submitters are always encouraged to add a comment when they receive a delivery.

Example Emission Responses on Fuel and Emissions Surveys

When filling out a weekly/bi-weekly Fuel and Emissions Survey, submitters should follow these guidelines for the Emissions Limitations section:

- “#1 limiting emission” refers to the most-limiting emission, defined as the constraint where the accumulated amount is closest to the limit. “#2 limiting emission” is similarly the constraint where the accumulated amount is second-closest to the limit. These questions should be updated throughout the year to reflect the current accumulated amounts.
- The amount remaining for each constraint is the limit amount minus the amount accumulated so far towards that limit.
- The amount remaining should change whenever the station consumes fuel, and may change even without recent fuel consumption for rolling constraints.

Here are some example emissions constraints and how they would be described on the Fuel and Emissions Survey, if they were the most-limiting emission at that time.

Example 1: Rolling 30-day limit on NOx

Station cannot emit more than 100 lb of NOx, evaluated on a rolling 30-day basis. The station has emitted 20 lb of NOx in the last 30 days leading up to this survey.

#1 limiting emission

*Emission with accumulated amount closest to limit.
Exclude hourly and real-time limitations.*

#1 limitation is on: *

Amount remaining: * lb

Limitation periodicity type: *

Limitation duration: * days

Additional details, if necessary:

Cannot emit more than 100 lb NOx in rolling 30 days

Example 2: Annual limit on oil consumption

Station cannot burn more than 100,000 gallons of oil in each calendar year. The station has burned 10,000 gallons of oil so far this year.

#1 limiting emission

*Emission with accumulated amount closest to limit.
Exclude hourly and real-time limitations.*

#1 limitation is on: *

Amount remaining: * gal

Limitation periodicity type: *

Limitation will reset on: *

Limitation duration: * days

Additional details, if necessary:

Cannot burn more than 100,000 gal every calendar year

Example 3: Rolling 12-month limit on runtime on natural gas

Station cannot run for more than 500 hours on natural gas per year, evaluated on a rolling basis. The station has run on natural gas for 100 hours in the past 12 months leading up to this survey.

#1 limiting emission

Emission with accumulated amount closest to limit.
Exclude hourly and real-time limitations.

#1 limitation is on: * Runtime on gas

Amount remaining: * 400 hours

Limitation periodicity type: * Rolling limit

Limitation duration: * 365 days

Additional details, if necessary:

Cannot run for more than 500 hours every 12 months (rolling)

Example 4: Daily limit on SOx

Station may not emit more than 100 lb of SOx per day.

#1 limiting emission

Emission with accumulated amount closest to limit.
Exclude hourly and real-time limitations.

#1 limitation is on: * SOx

Amount remaining: * 100 lb

Limitation periodicity type: * Rolling limit

Limitation duration: * 1 days

Additional details, if necessary:

Daily SOx limit is 100 lb

Example 5: Rolling 3-year limit on capacity factor

Station's capacity factor must not exceed 20% averaged over the most recent three year consecutive period. The station has generated 500,000 MWh in the past 3 years leading up to this survey, and its seasonal claimed capability is 100 MW.

#1 limiting emission

Emission with accumulated amount closest to limit.
Exclude hourly and real-time limitations.

#1 limitation is on: * Energy generated

Amount remaining: * 25600 MWh

Limitation periodicity type: * Rolling limit

Limitation duration: * 1095 days

Additional details, if necessary:

CF < 20% averaged over the most recent three year consecutive period, winter SCC = 100 MW

Example 6: No generation during ozone season

Station may not operate between June 1 and October 1. This survey is due during that time period. Outside of that time period, a different emission limit (if present) should be reported instead.

#1 limiting emission

Emission with accumulated amount closest to limit.
Exclude hourly and real-time limitations.

#1 limitation is on: * Energy generated

Amount remaining: * 0 MWh

Limitation periodicity type: * Resets on date

Limitation will reset on: * 10/01/2024

Limitation duration: * 122 days

Additional details, if necessary:

No burn during ozone season (6/1 to 10/1)

Example 7: Annual limit on water usage

Station cannot use more than 10,000 gallons of water per calendar year. The station has used 1,000 gallons so far this year.

#1 limiting emission
*Emission with accumulated amount closest to limit.
Exclude hourly and real-time limitations.*

#1 limitation is on: *

Other

"Other" emission name: *

Water

"Other" emission units: *

gallons

Amount remaining: *

9000

gallons

Limitation periodicity type: *

Resets on date

Limitation will reset on: *

01/01/2024

Limitation duration: *

365

days

Additional details, if necessary:

Annual limit on water usage is 10,000 gal

Frequently Asked Questions

1. The "Submit" button at the bottom of the survey form is greyed out. How do I submit?

There are several possible reasons for this:

- There is an error in your responses. Please check the error messages on the form and correct any issues. Make sure you answer all required questions.
- You are not authorized to edit/submit surveys, because your company's Security Administrator assigned you the "Survey Viewer" CAMS app group instead of the "Survey Submitter" app group. Please see [Gaining Access to the Survey Platform](#).
- This survey is no longer accepting responses. You can add a note on the next survey if need be.

2. When I click the "Submit" button, I get a pop-up message saying the form is not complete. What's wrong?

You did not provide an answer to a required question (marked with a red asterisk). When you close the pop-up, the missing questions will be highlighted in red.

3. I'm receiving email reminders for a survey I already submitted. Why?

There was an issue and ISO-NE has not received your submission for that survey. Please check:

- Did you receive an email confirmation of your submission? Be sure to click the "Submit" button at the bottom of the survey, and also click the "Confirm" button on the review page.
- Are you a survey submitter for multiple companies? Each company must submit a separate survey (with unique survey link).
- Do you have multiple surveys due? Please review your list of open surveys on the Ask ISO Survey page – your company may have both a Winter Readiness Survey as well as a Fuel Inventory and Emissions Survey due soon.

4. When I click on the survey link in my email, it takes me to the Ask ISO homepage instead of the survey. How do I access my survey?

If you are not already logged into <https://askiso.iso-ne.com/> and you click on a survey link, it will take you to the AskISO homepage. Click the "Login" link in the top right corner and enter your credentials.

If you are not immediately redirected to your survey upon successful login, you can either click on the survey link again, or access your survey via the "My Surveys" tab that appears upon login.

5. When I log into Ask ISO, I don't see a My Surveys tab. Why?

You do not have the proper permissions to submit or view surveys. Please see the [Gaining Access to the Survey Platform](#) section. If you have multiple accounts in Ask ISO (perhaps for different companies), please try logging in with your other account.

6. I'm in the "My Surveys" tab in Ask ISO, but I don't see any surveys listed. Why?

Please select a different list view such as "Surveys Open" or "Surveys Closed", using the triangle to the right of the list name. The list view "Recently Viewed" may not show any surveys.

Who to Contact for Help

For assistance with accessing the Ask ISO survey platform, finding a specific survey, or any time-sensitive question, please contact [ISO-NE Participant Support](#) using one of the following options:

- Submit an inquiry/request on [Ask ISO](#).
- Email AskISO@iso-ne.com with a short description of the issue.
- Call (413) 540-4220 or (833) 248-4220, Monday – Friday 8:00am – 5:00pm ET (non-holidays).

For assistance with answering survey questions for your specific resource, please email FuelSurveys@iso-ne.com. Please do not wait until the survey due date to ask these questions; inquiries to this email may not receive a response for several business days.

Revision History

Version	Date	Change
0	06/01/2021	Initial draft
1	10/25/2023	Revised for clarity; added FAQs; added example emissions responses
1.1	11/29/2023	Updated Ask ISO URL and added additional FAQ
2.0	08/08/2024	Updated <i>Response Validation</i> section to reflect survey form changes