ISO new england	© **ISO New England Inc. 2024**	*Procedure: Enter Resource Maintenance and Outage Requests*
	Process Name: Capture Resource Outage Requests	
	Procedure Number: OUTSCH.0010.0010	*Revision Number: 19*
	Procedure Owner: Andrew Kopacka	*Effective Date: February 14, 2024*
	Approved By: Director, Operations Support Services	*Valid Through: February 14, 2026*

SOP-OUTSCH.0010.0010
Enter Resource Maintenance and Outage Requests

Contents

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1.   Objective

The objective of this procedure is to document the responsibilities of ISO New England (ISO) staff with regards to recording a Resource, Dispatchable Asset Related Demand (DARD), Demand Response Resource (DRR), or Alternative Technology Regulation Resource (ATRR) outage request application. This procedure does **not** in any way change the intent of ISO New England Operating Procedure No. 5 - Resource Maintenance and Outage Scheduling (OP-5) but rather is intended to clarify OP-5 delegated responsibilities and the tasks performed by ISO staff members.

2.   Background

A Market Participant (MP) submits a Resource outage request application and ISO schedules the outage in accordance with OP-5. ISO schedules each outage in a manner to meet minimum prescribed system security and reliability principles.

This procedure does **not** pertain to Real-Time forced Resource outages, which are handled as redeclarations in accordance with CROP.36002 Redeclarations.

3.   Responsibilities

> **NOTE**
>
> Any North American Electric Reliability Corporation (NERC) Certified System Operator, certified at the Reliability Coordinator (RC) level, has the authority to take action(s) required to comply with NERC Reliability Standards.

1. Between 0700 and 1530 daily (including weekdays, holidays and weekends), a Resource Analyst (or designee) is responsible for entering data from each Resource outage request application data received into the ISO Outage Scheduling software.

2. The on-shift Forecaster is responsible for:

   A. When the Resource Analyst (or designee) position is **not** staffed (daily from 1530 through 0700), entering the Resource outage request application data into the ISO Outage Scheduling software.

   B. When notified by the Loader Operator or Generation Operator of the receipt of a Resource outage request application in Real-Time, entering the Resource outage request application data into the ISO Outage Scheduling software.

4.   Controls

- None

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5.   Instructions

5.1   Recording a Verbal Generator/DARD Outage Request Application

5.1.1 Perform Resource Analyst & Forecaster Duties

> **NOTE**
>
> When a Generator/DARD outage request application is handled over the telephone, the requestor may be notified immediately if the outage time for the application is accepted or whether or not another outage time is more appropriate.

1. When a verbal Generator/DARD outage request application is submitted to ISO, the Resource Analyst (or designee) or Forecaster shall enter the required data into the ISO Outage Scheduling software and notify the requestor that the outage request application has been received.

2. When Short-Term or Forced Generator/DARD outage request application information is verbally received by the Loader Operator or Generation Operator, the Forecaster shall enter the required data into the ISO Outage Scheduling software.

> **NOTE**
>
> If a Generator/DARD outage spans both a summer period and a winter period, two (2) separate outage request applications are to be entered into the ISO Outage Scheduling software to reflect the Seasonal Claimed Capability (SCC) in each of the two (2) different seasons. These related applications shall be linked within the Control Room Operations Window (CROW) software.
>
> If a Generator/DARD requests to extend an implemented Planned Outage (PO), the end date should **not** be extended. If the extension is requested by the Thursday prior to the PO end date, an Overrun Planned Outage (OPO) can be created. If the extension is requested after the Thursday prior to the PO end date or the reason for the outage differs from the original PO, a Forced Outage (FO) will be created.

3. When Generator/DARD outage request application information is received, the Resource Analyst (or designee) or Forecaster shall enter the following data into a "Generation Outage Request" form in the ISO Outage Scheduling software:

    •   Set the Outage Priority (e.g., Planned, Planned Overrun, etc.)

    •   Asset ID

    •   Reduction on each physical component of the Generator/DARD (Eco Max will be calculated based on the effective SCC)

- Outage planned start date/time

- Outage planned end date/time

- Outage Cause

- For Short Term Outages, ability to postpone

- If required, Black Start capability during outage

- Links between any related Transmission Outage Request or Generation Outage Request (if applicable)

- In the "External Comments" field, enter any additional information provided by requestor

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NOTE

If the "Public" radio button is selected, the MP or Generator Owner will be able to view the outage request application on the Web Client.

- For visibility, select the "Public" radio button

- Create a "Requested By Notification" entry indicating the name of the person requesting the outage

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NOTE

A planned outage request application must be submitted fifteen (15) calendar days before the start of the outage. The Resource Analyst (or designee) or Forecaster should **not** submit a PO request application without approval from the Manager, Long-Term Outage Coordination.

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4. The Resource Analyst (or designee) or Forecaster shall select "Submit" to save the applicable Generator/DARD "Generation Outage Request" form in the ISO Outage Scheduling software and the following information will be entered:

- An outage number will be assigned

- "Requested By" will identify the user creating the outage request application

- Outage status will be determined by the type of outage:

  o Forced and Informational Outage will be "Approved"

  o All other outages will be "Submitted"

5. The Resource Analyst (or designee) or Forecaster shall review the Generator/DARD outage request application data entered into the ISO Outage Scheduling software in accordance with SOP-OUTSCH.0030.0010 - Evaluate Resource Outage Requests.

5.2 Recording Alternative Technology Regulation Resource (ATRR) or Demand-Response Resource (DRR) or Installed Capacity (ICAP) Outage Request Application

1. When ATRR or DRR or ICAP planned outage request information is received, the Resource Analyst (or designee) or Forecaster shall enter the following data into the appropriate attachment in the ISO Outage Scheduling software under Asset ID 99999.

   - Date

   - ATRR or DRR or ICAP Name

   - ATRR or DRR or ICAP ID

   - Reduction

   - Planned Start

   - Planned End

   - Description of Outage

2. The Resource Analyst (or designee) or Forecaster shall select "Save Changes" to save the changes made to the attachment(s) in the ISO Outage Scheduling software and notify the requestor that the outage request application has been received.

NOTE

ATRR or DRR or ICAP planned outage request information is typically received via the GenerationOutageCoordinator mailbox. Mark processed emails with the blue, "Import Capacity Reduction" flag.

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6. Performance Measures

None

7. References

ISO New England Operating Procedure No. 5 - Resource Maintenance and Outage Scheduling (OP-5)

SOP- OUTSCH.0030.0010 - Evaluate Resource Outage Requests

CROP.36002 Redeclarations

8. Revision History

Rev. No.	Date	Reason	Contact
--	02/17/22	For previous revision history, refer to Rev 17 available through Ask ISO	Maya Ault
11	06/01/10	In Header , changed copyright date to 2010 and corrected SOP title; Changed Dispatchable Asset Related Demand in title to DARD; Minor editorial changes including use of acronyms, clarification of responsibilities for directed actions, improve grammar to be consistent with current practices; Globally replace titles Senior Outage Coordinator with Short Term Outage Coordinator/Engineer, added /Engineer to Short Term Specialist, Section 3 replaced NOTE text with statement provided by Director; Operations; Updated to include new FCM rules; Added NOTE prior to 5.1.1.4; Added SOP-RTMKTS,0125.0040 to References section	Mike Courchesne
12	01/05/11	Biennial review by procedure owner; Header updated copyright date; Globally replaced SAM with ISO Outage Scheduling; Replaced all a.m. and p.m. times with 24 hour times; Replaced page numbering in footer with Page X of Y format; Modified Section 2, Section 3.1, Section 3.2; Modified Section 3 of Loader/Generation Operators responsibilities; Modified Section 5.1.1 Title, Step 5.1.1.1, Step 5.1.1.2, NOTE prior to step 5.1.1.2; Replaced NOTE prior to step 5.1.1.3; Modified step 5.1.1.3; Replaced NOTE prior to step 5.1.1.4; Added new step 5.1.1.4 and bullets; Modified step 5.1.1.5 and bullets; Deleted NOTE following step 5.1.1.6; Modified step 5.1.2.2	Mike Courchesne
13	01/09/13	Biennial review by procedure owner; Headers, updated copyright date; 1st page Footer, deleted disclaimer 2nd paragraph; Minor grammar, editorial, punctuation, etc. changes; Globally used current Outage Coordinator job title as applicable; section 5.1.2.1 and in Section 7 deleted SOP-RTMKTS.0125.0040;	Norm Sproehnle
14	05/08/14	Biennial review completed by the procedure owner; Added 2nd paragraph to NOTE prior to Step 5.1.1.4; Global change to remove Loader and Generation Operator task , they are located in SOP-RTMKTS.0110.0010;	Norm Sproehnle
15	03/10/16	Biennial review by procedure owner; Minor editorial changes throughout document; Globally corrected SOP-OUTSCH.0010.0010 title;	Norm Sproehnle

Rev. No.	Date	Reason	Contact
16	03/08/18	Biennial review by procedure owner; Updated to include DRR outages for Pay for Performance; Globally made editorial changes to be consistent with current condtions, practices and management expectations;	Norm Sproehnle
17	03/04/20	Biennial review by procedure owner; Globally added document classification "ISO-NE PUBLIC" in footer; Updated the current process for submitting outages for ATRR and DRR,	Norm Sproehnle
18	02/17/22	Globally updated all references of Generator/DARD/ATRR/DRR to Resource; Minor grammar, editorial, punctuation, etc. changes; Deleted steps for processing a verbal request for DARD due to process being covered in 5.1.3 due to the DARD terminology being covered under Resource; Incorporated ICAP process to align with the current process;	Maya Ault
19	02/14/24	Updated roles that was previously identified as Short Term Outage Coordinator to Resource Analyst to reflect the current organizational changes; Updated new procedure owner; Minor administrative changes;	Maya Ault

9. Attachments

None.