

Guide to Online Data Submission via the IESO Portal

July 2017



Guide to Online Data Submission via the IESO Portal

AN IESO MARKETPLACE TRAINING PUBLICATION

This guide has been prepared to assist in the IESO training of market participants and has been compiled from extracts from the market rules or documents posted on the web site of Ontario's Independent Electricity System Operator. Users of this guide are reminded that they remain responsible for complying with all of their obligations under the market rules and associated policies, standards and procedures relating to the subject matter of this guide, even if such obligations are not specifically referred to herein. While every effort has been made to ensure the provisions of this guide are accurate and up to date, users must be aware that the specific provisions of the market rules or particular document shall govern.

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1. Introduction

Market Participants can use the IESO Portal to submit required settlement data. You can also view settlement data previously submitted by your company. If you have access to settlement data for more than one company, you can submit and view data for all these companies using a single sign-on.

Online settlement data submission is available through the IESO Portal Settlements community. (A Portal community page is a web page where users with similar interests can access applications, use related links, and get information.)

For more information on the IESO Portal, please refer to the [Guide to the IESO Portal](#), available on our [Training](#) web page. For assistance with your user ID and password, please contact IESO Customer Relations.

Some of the features available in the Settlements community are:

- A 'print screen' button that allows you to print a page prior to submission
- The ability to search for all data submissions in a specified date range
- A tool tip that appears on some submission pages when you hover the mouse over an item
- The ability to submit data for the next settlement period
- A form for the Ontario Electricity Financial Corporation (OEFC) to submit non-utility generator (NUG) adjustment amounts and forecasts via the portal
- A form for the former Ontario Power Authority (OPA) to submit data on global adjustment amounts via the portal

2. Submitting Settlement Data Online: Overview

Here is an example of an online settlement data submission screen:

Header Section

Submission of Transmission Service Charges for Embedded Generation
(Formerly Form 1564)

Market Participant Name:
Market Participant ID: Submitter:
Date Submitted: Not Yet Submitted Settlement Period: Jan 01, 2013 - Dec 31, 2013

EXCLUDE HST CALCULATIONS IN EACH TOTAL

Submission Section

Submit Submission Window: 03/01/2014 - 03/31/2014

Body Section

Transmitter Name
Transmitter Contact Title
Transmitter Contact Name
Transmitter Contact Phone Number
Transmitter Date Verified

The **Header** section includes:

- The screen name, and, where applicable, the name of the non-online form previously used to submit this data
- Market Participant name and ID
- The submission date and user ID of the submitter
- The settlement period
- **Help** button
- **Print** button

The **Submission** section includes:

- **Submit** button
- **Clear fields** button
- **Void submission** button
- Submission window status (gives dates window is open)

Body section

- The body section varies according to the data entry screen. Please refer to Section 5, "Instructions for Submitting Specific Types of Settlement Data," for details on specific screens.
- If a date is required on the screen, a calendar button is included.
- If an amount is required, the field tells you the type of data required (e.g., \$, kWh).

Errors, Warnings and General Submission Rules

Although each screen has its own rules, a few general ones apply to all settlement data entry screens:

- You must complete both fields in a box that asks for the kilowatt hours and the dollar amount:

\$	
kWh	

- If the box asks for a consumer or installation quantity (e.g., number of regulated consumers), you must complete at least one of the **\$** and **kWh** boxes:

Number of Regulated Consumers		Payments to IESO		Payments from IESO	
First Tier		\$		\$	
		kWh		kWh	
Second Tier		\$		\$	
		kWh		kWh	

- An error message box will appear if there is a validation error. You cannot submit data if there is a validation error.
- If data you enter is questionable but possibly correct, a warning message box will appear. You can correct the data, or you can click on the **Ignore warnings** checkbox:

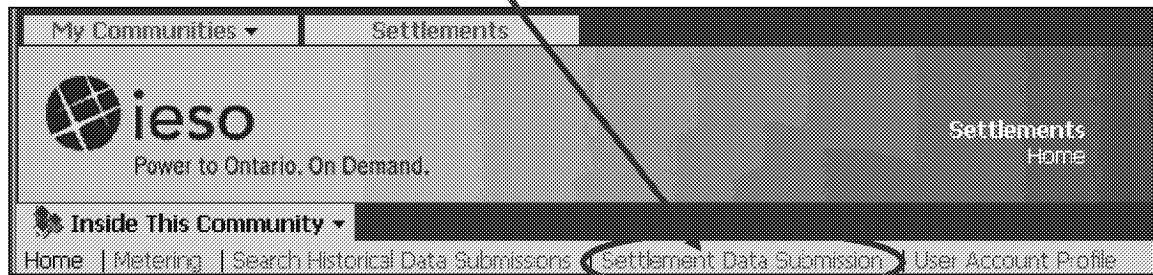
 **Please note the following warnings**

- Some warning text

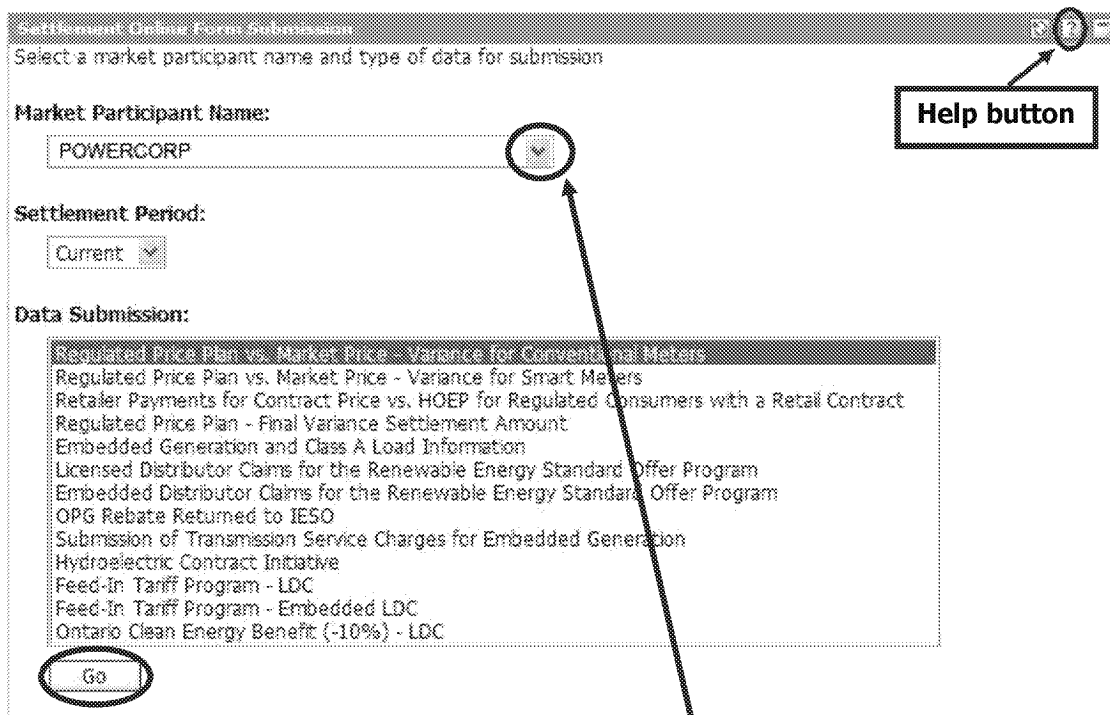
☐ **Ignore warnings**

3. Submitting Settlement Data

Step 1: Click on **Settlement Data Submission** on the Settlements home page.



The **Settlement Data Submission** page appears:



Select a market participant name and type of data for submission

Market Participant Name:

Settlement Period:

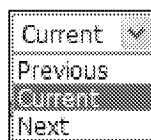
Data Submission:

- Regulated Price Plan vs. Market Price - Variance for Conventional Meters
- Regulated Price Plan vs. Market Price - Variance for Smart Meters
- Retailer Payments for Contract Price vs. HOEP for Regulated Consumers with a Retail Contract
- Regulated Price Plan - Final Variance Settlement Amount
- Embedded Generation and Class A Load Information
- Licensed Distributor Claims for the Renewable Energy Standard Offer Program
- Embedded Distributor Claims for the Renewable Energy Standard Offer Program
- OPG Rebate Returned to IESO
- Submission of Transmission Service Charges for Embedded Generation
- Hydroelectric Contract Initiative
- Feed-In Tariff Program - LDC
- Feed-In Tariff Program - Embedded LDC
- Ontario Clean Energy Benefit (-10%) - LDC

Step 2: The name of your company appears in the **Market Participant** field.

If you have access to settlements data for more than one company, click the drop-down arrow to see a list of these participants – you do not have to log on separately to view each participant's data.

You can select **Previous**, **Current** or **Next** from the **Settlement Period** drop-down menu:



Select the data type you wish to submit, then click the button.

Step 3: Your company's most recent active data appears. If there is no active submission, an entry screen with blank fields appears.

Submit Submission Window: 12/01/2007 - 01/31/2008 Clear Fields | Void Submission

Licensed distributors claims

Number of Regulated Consumers

Payments to IESO \$ Payments from IESO \$

Embedded distributors claims

Number of Regulated Consumers

Payments to IESO \$ Payments from IESO \$

Licensed distributor claims on behalf of retailers using retailer-consolidated billing

Step 4: Complete the form, then click **Submit**. (For details on submitting specific types of data, please see Chapter 5.) Please note: on some screens, a tool tip appears when you hover the mouse over the item.

If you want to save or submit your entry, click the **Submit** button. You can change your submission as many times as you wish during the submission window time period, essentially resaving the data each time. After the submission window time period ends, the system takes the most recent data saved as the final submission.

A confirmation screen appears after you submit the data.

Thank you

Your **Regulated Price Plan - Final Variance Settlement Amount** submission for **POWERCORP** has successfully been received

The reference number is **0000-0**

Step 5: Click on the reference number to view the submitted data.

Step 6: Click **Log Off**. When you click on **Log Off**, a new web page will appear and you will be prompted to log out of the portal.

Be sure to log off when you have finished your session. If you don't log off, you will stay connected to **Settlement Data Submissions**. Your session will time out after 90 minutes of not being used.

4. Viewing Previously Submitted Settlement Data

Step 1: Click on **Search Historical Data Submissions** on the Settlements community home page.



The **Search Historical Data Submissions** page appears:

A screenshot of the 'Settlement Online Form Search' page. The page has a title bar 'Settlement Online Form Search' and a subtitle 'Search historical data to retrieve a particular submission'. Below the subtitle are several fields: 'Market Participant Name:' with a dropdown menu showing 'Connor Alexander Power' (circled in red), 'Data Submission' with a dropdown menu showing 'Regulated Price Plan vs. Market Price - Variance for Conventional Meters', 'Report Date Range' with 'Start' and 'End' sections. The 'Start' section has dropdowns for 'January' and '2014'. The 'End' section has dropdowns for 'February' and '2014'. At the bottom is a 'Search' button.

Step 2: The name of your company appears in the **Market Participant** field.

If you have access to settlements data for more than one company, click the drop-down arrow to see a list of these participants – you do not have to log on separately to view each participant's data.

4. Viewing Previously Submitted Settlement Data

Step 3: Click the drop-down arrow next to **Data Submission**, then select the data you wish to view. Please note: if you wish to see all your data submissions for the selected time period, you can select **All Data Submissions**.

Settlement Online Form Search

Search historical data to retrieve a particular submission

Market Participant Name:

HYDRO ONE NETWORKS INC.

Data Submission

- Regulated Price Plan vs. Market Price - Variance for Conventional Meters
- Regulated Price Plan vs. Market Price - Variance for Conventional Meters
- Regulated Price Plan vs. Market Price - Variance for Smart Meters
- Retailer Payments for Contract Price vs. HOEP for Regulated Consumers with a Retail Contract
- Regulated Price Plan - Final Variance Settlement Amount
- Embedded Generation and Class A Load Information
- Licensed Distributor Claims for the Renewable Energy Standard Offer Program
- Embedded Distributor Claims for the Renewable Energy Standard Offer Program
- OPG Rebate Quarterly Distribution
- OPG Rebate Returned to IESO
- Submission of Transmission Service Charges for Embedded Generation
- Hydroelectric Contract Initiative
- Feed-In Tariff Program - LDC
- Feed-In Tariff Program - Embedded LDC
- Ontario Clean Energy Benefit (10%) - LDC
- All Data Submissions

It is not the data of

Step 4: Select the required **Start** and **End** dates, then click **Search**.

Settlement Online Form Search

Search historical data to retrieve a particular submission

Market Participant Name:

Connor Alexander Power

Data Submission

All Data Submissions

Report Date Range

Start

January 2014

End

February 2014

Search

Step 5: The **Search Results** page appears:

Search Results

Found 6 records: displaying 6 records, from 1 to 6. Page 1 / 1

Report	Report Date	HP Name	HP ID	Data Set	Submitter	Date Submitted	Warnings Ignored?
View	Jan 2014	Connor Alexander Power	111222	Regulated Price Plan vs. Market Price - Variance for Conventional Meters	diazp	Feb 5, 2014	Yes
View	Jan 2014	Connor Alexander Power	111222	Regulated Price Plan vs. Market Price - Variance for Smart Meters	diazp	Feb 5, 2014	Yes
View	Jan 2014	Connor Alexander Power	111222	Regulated Price Plan - Final Variance Settlement Amount	diazp	Feb 5, 2014	No
View	Jan 2014	Connor Alexander Power	111222	Embedded Generation and Class A Load Information	diazp	Feb 5, 2014	No
View	Jan 2014	Connor Alexander Power	111222	Feed-In Tariff Program - LDC	diazp	Feb 5, 2014	No
View	Jan 2014	Connor Alexander Power	111222	Ontario Clean Energy Benefit (-10%) - LDC	diazp	Feb 5, 2014	Yes

To view data, click the appropriate **View** button. Please note: you can sort the columns by clicking any of the headers in the top row.

Step 6: Click **Log Off**. When you click on **Log Off**, a new web page will appear and you will be prompted to log out of the portal.

Be sure to log off when you have finished your session. If you don't log off, you will stay connected to **Settlement Data Submissions**. Your session will time out after 90 minutes of not being used.

5. Instructions for Submitting Specific Types of Settlement Data

5.1 Regulated Price Plan vs. Market Price – Variance for Conventional Meters

Details

The Conventional Meter Regulated Price Plan sets a lower fixed price for electricity consumption up to a monthly threshold amount, with consumption above this level at a higher price.

Currently, the Ontario Energy Board (OEB) adjusts both the threshold amount and prices every six months – once during the winter season (November 1 – April 30) and once during the summer season (May 1 – October 31).

Participants submitting this form should refer to the OEB’s Regulated Price Plan threshold amounts. First tier refers to monthly electricity use (in dollars and kWh) up to the applicable seasonal threshold. Second tier is any amounts (in dollars and kWh) greater than the applicable seasonal threshold.

Effective May 1, 2017, the OEB set the Tiered Prices taking into account part of the reductions that had been announced as part of the Ontario Fair Hydro Plan (OFHP). The Tiered Prices were lowered again effective July 1, 2017 reflecting the *Fair Hydro Act, 2017*.

Use the **Regulated Price Plan vs. Market Price – Variance for Conventional Meters** screen to submit claims to us for the previous month. Dollar amounts claimed should be calculated using the Tiered Prices after the OFHP discount and entered in the RPP Fair Hydro Plan Discount fields. A value of \$0.01 must be entered in the RPP Variance field where a RPP Fair Hydro Plan Discount \$ and kWh pair has been entered. Market Price is calculated using Global Adjustment (GA) + the Hourly Ontario Energy Price (HOEP).

Format

Follow the general submission rules (see Chapter 2) when entering data.

The first four data entry subsections are in the following format:

Number of Regulated Consumers			
First Tier		Payments to IESO	Payments from IESO
RPP Variance	\$		\$
RPP Fair Hydro Plan Discount	\$		\$
	kWh		kWh
Second Tier		Payments to IESO	Payments from IESO
RPP Variance	\$		\$
RPP Fair Hydro Plan Discount	\$		\$
	kWh		kWh
			To Top

The last two subsections are in the following format:

	Payments to IESO	Payments from IESO	
\$ kWh		\$ kWh	
			To Top

5.2 Regulated Price Plan vs. Market Price – Variance for Smart Meters

Details

The Regulated Price Plan Time-of-Use (TOU) Prices set the price for electricity based on when the energy is consumed. Energy consumption during a month falls into three categories with respect to both prices and consumption times: on-peak, mid-peak and off-peak.

Currently, the Ontario Energy Board (OEB) adjusts both the threshold amount and prices every six months – once during the winter season (November 1 – April 30) and once during the summer season (May 1 – October 31).

Effective May 1, 2017, the OEB set the TOU prices taking into account part of the reductions that had been announced as part of the Ontario Fair Hydro Plan (OFHP). The TOU prices were lowered again effective July 1, 2017 reflecting the *Fair Hydro Act, 2017*.

Use the **Regulated Price Plan vs. Market Price – Variance for Smart Meters** data entry screen to send us claims for the previous month. Dollar amounts claimed should be calculated using the TOU prices after the OFHP discount and entered in the RPP Fair Hydro Plan Discount fields. A value of \$0.01 must be entered in the RPP Variance field where a RPP Fair Hydro Plan Discount \$ and kWh pair has been entered. Market Price is calculated using Global Adjustment (GA) + the Hourly Ontario Energy Price (HOEP).

Format

Follow the general submission rules (see Chapter 2) when entering data.

The first four data entry subsections are in the following format:

Number of Regulated Consumers				
Payments to IESO				
		Off Peak	Mid Peak	On Peak
RPP Variance	\$		\$	\$
RPP Fair Hydro Plan Discount	\$		\$	\$
	kWh		kWh	kWh
Payments from IESO				
		Off Peak	Mid Peak	On Peak
RPP Variance	\$		\$	\$
RPP Fair Hydro Plan Discount	\$		\$	\$
	kWh		kWh	kWh
To Top				

The last two subsections are in the following format:

Payments to IESO	
Off Peak	
\$	
kWh	
Payments from IESO	
Off Peak	
\$	
kWh	
To Top	

5.3 Retailer Payments for Contract Price vs. HOEP for Regulated Consumers with a Retail Contract

Details

If you report conventional or smart meter claims, use this data entry screen to also report to us for the previous month:

- Payments, retailers using distributor-consolidated billing
- Payments, retailers using distributor-consolidated billing with embedded distributor
- Payments, retailers using retailer-consolidated billing
- Payments, retailers using retailer-consolidated billing with embedded distributor

Format

Follow the general submission rules (see Chapter 2) when entering data.

All data entry subsections in this screen are in the following format:

Number of Regulated Consumers			
Payments to IESO		Payments from IESO	
\$		\$	
kWh		kWh	
			To Top

5.4 Regulated Price Plan – Final Variance Settlement Amount

Details

Consumers who leave the Regulated Price Plan (RPP) are subject to an RPP final variance settlement amount to reflect their share (whether positive or negative) of any accumulated variance between the actual cost of power and the amount paid by RPP consumers for the same volume.

The RPP final variance settlement amount is to be charged or credited to a consumer who leaves RPP supply because, for example, they move outside of Ontario or switch to a retailer. A distributor must collect or pay final variance settlement amounts (FVSA) for each consumer leaving RPP supply. Dollars and the number of regulated consumers leaving RPP are reported.

Effective July 1, 2017, the OEB has suspended the FVSA. Until further notice, no FVSA is to be charged or credited by distributors to any customer that leaves the RPP on or after July 1, 2017.

Use the **Regulated Price Plan - Final Variance Settlement Amount** screen to report your amounts to us for the months prior to July 1, 2017 according to the following categories:

- Payments re: licensed distributors
- Payments re: embedded distributors
- Payments re: retailers using retailer-consolidated billing
- Payments re: retailers using retailer-consolidated billing, embedded distributor

Format

Follow the general submission rules (see Chapter 2) when entering data.

All data entry subsections in this screen are in the following format:

Number of Regulated Consumers		Payments to IESO	Payments from IESO
RPP Final Variance	\$		\$
RPP Fair Hydro Plan Discount	\$		\$

5.5 Embedded Generation and Class A Load Information Details

Distributors are required to provide the IESO monthly with both embedded generation and Class A Consumer volumes in order to support the settlement of the Global Adjustment. Distributors provide both prior-month actual data and current-month forecast data for these quantities during the first week of a month.

Example: LDC1 is completing the Embedded Generation Information form during the September 1-4 filing window. LDC1 would file:

- the actual electricity data for the month of August, and
- a forecast for the month of September.

The actual volumes of electricity for these quantities are used in allocating the Global Adjustment to Class B Consumers and Market Participants for the prior month. The forecast volumes of electricity are used to prepare estimates of the Class B Global Adjustment rate for the current month.

The volume reported for Class A Consumers is for the same group of Class A Consumers used as the basis for determining the peak demand factor for the Distributor used to settle Class A Global Adjustment during the adjustment period. For more information, see *Market Manual 5: Settlements, Part 5.5 Physical Markets Settlement Statement*.

The volume reported for embedded generation includes only those volumes that offset distributor load; total embedded generation volumes should not include injections to the IESO controlled grid. The submission includes embedded generation volumes for all non-contracted generation and all contracted generation (Renewable Energy Standard Offer Program, Hydroelectric Contract Initiative and Feed-In Tariff Program). The contracted embedded generation volumes are reported for the month they are metered, regardless of the contract approval status.

Distributors are not required to provide the IESO with generation amounts for facilities that are eligible for net metering (Ontario Regulation 541/05) if that generation has offset the related load. If the generation is less than the related load for the given peak hour, no embedded generation is reported to the IESO. Embedded generation that results in injections into the IESO-controlled grid is also not included in the total embedded generation volumes submitted by LDCs. If the generation is greater than the related load, the amount injected to the LDC system should be submitted to the IESO. Report to us, for the previous month:

- Total volumes of electricity supplied during the month by:
 - Embedded generators
 - Embedded generators to an embedded distributor
- Total volumes of electricity distributed during the month to:
 - Class A consumers within your service area
 - Class A consumers with an embedded distributor's service area

For the current month, forecast:

- The monthly volume of electricity to be supplied by
 - Embedded generators
 - Embedded generators to an embedded distributor
- The volumes of electricity that will be distributed to:
 - Class A consumers within your service area
 - Class A consumers with an embedded distributor's service area

Format

Follow the general submission rules (see Chapter 2) when entering data.

This screen has only one subsection.

Submit Submission Window: MM/DD/YYYY – MM/DD/YYYY	
Actual Monthly Amount For:	
Volume of electricity supplied by embedded generators to a licensed distributor	kWh
Volume of electricity supplied by embedded generators to an embedded distributor	kWh
Volume of electricity distributed to Class A consumers during the month	kWh
Volume of electricity distributed to Class A consumers by an embedded distributor	kWh
Monthly Forecast Amount For:	
Volume of electricity to be supplied by embedded generators to a licensed distributor	kWh
Volume of electricity to be supplied by embedded generators to an embedded distributor	kWh
Volume of electricity to be distributed to Class A consumers during the month	kWh
Volume of electricity to be distributed to Class A consumers by an embedded distributor	kWh

The **Actual Monthly Amount For:** and **Monthly Forecast Amount For:** headings display the previous month and current month trade periods.

Be sure to input all the kWh fields as pairs (that is, both the licensed distributor current and forecast volumes and/or embedded distributor current and forecast volumes).

5.6 Licensed Distributor Claims for the Renewable Energy Standard Offer Program

Details

Under the Renewable Energy Standard Offer Program (RESOP), distributors pay specific types of embedded generators at the price set out in the generator's standard offer contract.

Distributors calculate the difference between the contracted payments to RESOP participants and the wholesale market price for the same amount of electricity. The distributors submit this difference to us monthly, showing the amount of the claim for each category. The wholesale market price is calculated using the Hourly Ontario Energy Price (HOEP). Global Adjustment **is not** used in this submission. Values for Off Peak, On Peak, and On Peak Performance Incentive amounts are submitted for the last trade day of the month. The On Peak Performance Incentive and On Peak data are mutually exclusive (i.e., the On Peak Performance Incentive should not be included in the "On Peak" amount).

Installations refer to facilities that have reached commercial operation. If the facility has not reached commercial operation, settlement is not required.

The **Licensed Distributor Claims for the Renewable Energy Standard Offer Program** screen is divided into two parts:

- Renewable Energy Standard Offer Program Licensed Distributors, and
- Renewable Energy Standard Offer Program Embedded Distributors.

Use this form to report the following RESOP categories:

- Wind power
- Biomass power
- Small hydro power
- Solar photovoltaic power

Format

Follow the general submission rules (see Chapter 2) when entering data.

All subsections on this screen are in the following format:

Number of Regulated Installations		
Payments to IESO		
Off Peak	On Peak	On Peak Performance Incentive
\$	\$	\$
kWh	kWh	
Payments from IESO		
Off Peak	On Peak	On Peak Performance Incentive
\$	\$	\$
kWh	kWh	
To Top		

5.7 OPG Rebate Returned to IESO

Details

Distributors may become aware that funds from the Ontario Power Generation Rebate cannot be distributed, either through notification by their retailers or because their own customers cannot be located.

The amount of any Ontario Power Generation Rebate that cannot be distributed to customers must be returned to us.

Use the **OPG Rebate Returned to IESO** data entry screen to notify us.

Format

There is only one subsection, presented in the following format:

Submit		Submission Window: 02/03/2014 - 02/06/2014	
Invoice Date of Original Rebate Received from IESO			
Date Distributor Realized Amount Could Not Be Distributed			
Rebate Amount Returned to IESO	\$		
Interest Returned	\$		
Reason for Return			
Add Information to Table			

The totals entered should not include the GST.

Complete all the fields, then click the **Add Information to Table** button, then click **Submit**.

Repeat these steps if you need to submit more than one entry (for example, there may be different reasons for returning the rebate).

The bottom of the screen (not shown) lists all the data entered for the current submission window, and also allows you to delete entries.

Once all entries have been added to the table, click **Submit** to complete the form.

5.8 Submission of Transmission Service Charges for Embedded Generation

Details

Transmission customers that attract line and/or transformation connection service charges and that have embedded generation which was approved after October 30, 1998 use the **Submission of Transmission Service Charges for Embedded Generation** screen to provide this information to us.

Submit data within three months of the calendar year end for each embedded generation facility for which a metering point has been registered without a corresponding wholesale physical meter.

Transmission customers with an embedded generation facility that meets the requirement set out in Chapter 6, Section 4.5.1 of the Market Rules must report annual Line and Transformation Connection Service Charges for embedded generation applicable to the host transmission customer (i.e. Hydro One), who then calculates and verifies the reported amount. Once an agreement is achieved between the transmission customer and the transmitter, this form can be completed.

If the participant cannot submit this information within the submission period, the IESO shall use the installed Maximum Continuous Rating (MCR) for the embedded generation facilities provided to the IESO at the time of the meter point registration as per Chapter 6, Section 4.5.4

Format

Submit
Submission Window: 03/01/2014 - 03/31/2014

Transmitter Name

Transmitter Contact Title

Transmitter Contact Name

Transmitter Contact Phone Number

Transmitter Date Verified

Embedded Generation Facility Name

Transmission Delivery Point ID

Line Connection Service Charge

\$

Transformation Connection Service Charge

\$

Complete the fields, then click the **Add Information to Table** button, then click **Submit**.

Note: All fields are mandatory except for the **Line Connection Service Charge** field and the **Transformation Connection Service Charge** field.

Repeat these steps if you need to submit more than one entry. The bottom of the screen (not shown) lists all the data added to the table for the current submission window and also allows you to delete entries.

When all your data has been entered, click **Submit** to complete the form.

5.9 Hydroelectric Contract Initiative Program

Details

The IESO has entered into procurement contracts under the Hydroelectric Contract Initiative (HCI) with qualified existing hydroelectric generation facilities. The HCI supports new contracts for hydroelectric facilities that are connected to the IESO-controlled grid but not owned by OPG.

Distributors with participating generation facilities must calculate the difference between:

- the amount that was paid to the participating embedded generators for electricity produced calculated at wholesale market prices, and
- the amount owed to participating embedded generators calculated at the contract price.

This amount will be either positive or negative and will be charged or paid to the Local Distribution Companies (LDCs) who settle the contracts with the individual contracted generators. The market price is calculated using the Hourly Ontario Energy Price (HOEP). Global Adjustment **is not** used in this submission.

LDCs usually settle IESO HCI contracts with small embedded facilities under 10 MW, while the IESO settles directly with large facilities (over 10 MW).

Installations refer to facilities that have reached commercial operation. If the facility has not reached commercial operation, settlement is not required.

Format

Follow the general submission rules (see Chapter 2) when entering data.

All subsections on this screen are in the following format:

Number of Installations			
Payments to IESO			
	Off Peak		On Peak
\$		\$	
kWh		kWh	
Payments from IESO			
	Off Peak		On Peak
\$		\$	
kWh		kWh	
			To Top

On Peak is claimed for energy produced on a business day between 11 a.m. and 7 p.m.

5.10 Feed-In Tariff Program – LDC

Details

Under the Feed-In Tariff (FIT) Program, distributors pay specific types of embedded generators at the price set out in the generator's FIT contract with the IESO.

Distributors calculate the difference between the contracted payments to FIT Program participants and the wholesale market price for the same amount of electricity. The market price is calculated using the Hourly Ontario Energy Price (HOEP). Global Adjustment **is not** used in this submission. The distributors submit this difference to us monthly, showing the amount of the claim for each category.

Use the **Feed-In Tariff Program – LDC** screen to report the following FIT Program categories:

- Micro Photovoltaic
- Rooftop Photovoltaic
- Ground Mounted Photovoltaic
- Wind Power Water Power
- Biomass
- Biogas
- Landfill Gas

Format

Follow the general submission rules (see Chapter 2) when entering data.

All subsections on this screen are in the following format:

	Payments from IESO		Payments to IESO		No of Installations
	kWh	\$	kWh	\$	#
Off Peak					
On Peak					
					To Top

Installations refer to facilities that have reached commercial operation. If the facility has not reached commercial operation, settlement is not required.

On Peak is claimed for energy produced on a business day between 11 a.m. and 7 p.m.

5.11 Feed-In Tariff Program – Embedded LDC

Details

Under the Feed-In Tariff (FIT) Program, distributors pay specific types of embedded generators at the price set out in the generator's FIT contract with the IESO. In this case, Market Participant Distributors submit claims for their embedded distributors with embedded generation.

Embedded distributors calculate the difference between the contracted payments to FIT Program participants and the wholesale market price for the same amount of electricity. The market price is calculated using the Hourly Ontario Energy Price (HOEP). Global Adjustment **is not** used in this submission. Embedded distributors forward their claims to the Market Participant Distributor. Market Participant Distributors submit this difference to the IESO monthly, showing the amount of the claim for each category.

Use the **Feed-In Tariff Program – Embedded LDC** screen to report the following FIT Program categories:

- Micro Photovoltaic
- Rooftop Photovoltaic
- Ground Mounted Photovoltaic
- Wind Power Water Power
- Biomass
- Biogas
- Landfill Gas

Format

Follow the general submission rules (see Chapter 2) when entering data.

All subsections on this screen are in the following format:

	Payments from IESO		Payments to IESO		No of Installations
	kWh	\$	kWh	\$	#
Off Peak					
On Peak					
					To Top

Installations refer to facilities that have reached commercial operation. If the facility has not reached commercial operation, settlement is not required.

On Peak is claimed for energy produced on a business day between 11 a.m. and 7 p.m.

5.12 Real-Time Generation Cost Guarantee Information

Details

This form is for market participants who are eligible to recover combined guaranteed costs. These costs are associated with start-up and ramp to minimum loading point for unit commitments under the Real-Time Generation Cost Guarantee (RT-GCG) program.

The IESO Board has approved a new cost recovery framework which will clarify and increase the transparency for market participants of costs eligible for recovery under the GCG program.

For trade dates on or after August 1, 2017, the new cost recovery methodology will be reflected on the GCG form with a more detailed breakdown of the eligible recovery costs. For trade dates prior to August 1, 2017, the original GCG form will remain available to market participants for the submission of the two lump sum costs for recovery, Fuel Cost and O&M Cost.

To be considered for compensation, submit your information no later than 17:00 on the 16th business day following the trading day to be included in the GCG calculation. You may revise your information anytime up to this deadline.

For more information on data submitted in this form as well as the eligibility for compensation and the calculation of the compensation please refer to *Market Manual 4 Market Operations, Part 4.6: Real-Time Generation Cost Guarantee Program*.

Format

Follow the general submission rules (see Chapter 2) when entering data.

Original GCG Form (before 08/01/2017)

Submit Submission Window: 04/26/2017 - 05/17/2017		Clear Fields / Your Submission
Trade Date		
GCG Event Information		
Resource Name		
Resource ID		
RT: Synchronized Hour Ending (EST)		
Number of Ramp Intervals		
Starting State		
Start-up and Ramp Costs		
Fuel Cost	\$	
OBPR Cost	\$	
Add Information to Table		

Modified GCG Form with the New Cost Recovery Methodology (As of 08/01/2017)

Submit Submission Window: 05/01/2017 - 05/22/2017		Clear Fields / Your Submission
Trade Date		
GCG Event Information		
Resource Name		
Resource ID		
RT: Synchronized Hour Ending (EST)		
Number of Ramp Intervals		
Starting State		
Exchange Rate Information		
Exchange Rate (USD to CAD)		
Fuel 1 Costs for Start-up and Ramp to MLP		
Fuel Type		
Fuel Price	\$	
Exchange Rate (USD to CAD)		
Fuel Price CAD	=\$	
Service Price Adder	\$	
Cost of Fuel		=\$
Start Volume (Fuel)		
Compressor Fuel Volume	cc	
Total Fuel Volume		=\$
Cap and Trade Price Adder	\$	
Cap and Trade Costs	=\$	
Total Fuel Costs for Start-up and Ramp to MLP (Rounded)	=\$	

Fuel 2 Costs for Start-up and Ramp to MLP

Fuel Type	--- Select One ---	
Fuel Price	\$	--- Select if One ---
Exchange Rate (USD to CAD)	\$	
Fuel Price CAD	= \$	
Service Price Adder	\$	
Cost of Fuel		= \$
Start Volume (hrd)		
Compressor Fuel Volume	GJ	
Total Fuel Volume		= GJ
Cap and Trade Price Adder	\$	
Cap and Trade Costs		= \$
Total Fuel Costs for Start-up and Ramp to MLP (Rounded)		= \$

O&M Costs for Start-up and Ramp to MLP

Electricity Consumption Price	\$/MWh	
Electricity Consumption Quantity	MWh	
Electricity Consumption Cost		= \$
Operating Consumables Cost Adder		\$
Planned Maint. Cost Adder USD Portion	\$	
Exchange Rate (USD to CAD)		
Planned Maint. Cost Adder Converted to CAD	= \$	
Planned Maint. Cost Adder CAD Portion	\$	
Total Planned Maintenance Cost		= \$
Total O&M Costs for Start-up and Ramp to MLP (Rounded)		= \$

On the modified GCG form, complete the fields and then click the **Populate Calculated Fields** button to view the calculated costs.

For both original and modified GCG forms, click the **Add Information to Table** button to add the entry to the Submission Information table at bottom of the screen (not shown).

Repeat these steps if you need to submit more than one entry. When all entries have been added, you then submit the final GCG settlement claim for a particular trading date by clicking the “Submit” button.

The Submission Information table at the bottom of the screen (not shown) lists all the data entered for the current submission window, and also allows you to delete entries.

Historical submissions made before the effective trade date will be displayed in the new cost recovery format, with the original Fuel Cost amount displayed as the “Total Fuel 1 Costs for Start-up” and the O&M Cost amount displayed as the “Total O&M Costs for Start-up and Ramp to MLP”.

5.13 Ontario Clean Energy Benefit (-10%) Program - LDC

Details

The Ontario Clean Energy Benefit (OCEB) provided eligible consumer accounts with a monthly 10% rebate off the applicable portion of their electricity bills. The OCEB eligibility period ended on December 31, 2015. Until further notice, consumers can still receive OCEB amounts relating to that 5-year period of eligibility. Where consumers met the criteria to receive the benefit, they can receive the full amount, going back to the beginning of the program in 2011.

This form is for Market Participant Distributors to claim the 10% financial assistance that was provided to consumers that had eligible accounts with them; with any of their wholly-embedded distributors; and with any licensed retailers that use retailer-consolidated billing and that conduct business in their service area or the service area of any of their wholly-embedded distributors.

In the **Ontario Clean Energy Benefit (-10%) Program – LDC** screen, under Previous Month Adjustments, report the 10% rebate provided on customer bills, including uplift and other charges (including HST).

Format

Follow the general submission rules (see Chapter 2) when entering data.

All subsections of this screen are in the following format:

	Payments to IESO	Payments from IESO	
Current Month Claim \$			
Previous Month Adjustments \$			To Top

5.14 Ontario Clean Energy Benefit (-10%) Program – Unit Sub-Meter Provider Details

The OCEB provided eligible consumer accounts with a monthly 10% rebate off the applicable portion of their electricity bills. The OCEB eligibility period ended on December 31, 2015. Until further notice, consumers can still receive OCEB amounts relating to that 5-year period of eligibility. Where consumers met the criteria to receive the benefit, they can receive the full amount, going back to the beginning of the program in 2011.

This form is for unit sub-meter providers to claim the 10% financial assistance provided by them on their fees and charges for unit sub-metering that appear on invoices issued by them to consumers that were entitled to receive financial assistance. The claim submitted for the 10% reduction in the administration fee should include HST.

In the **Ontario Clean Energy Benefit (-10%) Program – Unit Sub-Meter Provider** screen, under Previous Month Adjustments, report the 10% rebate provided on the administrative charges portion of customer bills (including HST).

Format

Follow the general submission rules (see Chapter 2) when entering data.

All subsections of this screen are in the following format:

	Payments to IESO	Payments from IESO	
Current Month Claim \$			
Previous Month Adjustments \$			To Top

5.15 Coincident Peak Data for Class A Consumer Consumption and Embedded Generation – Annual Submission

Details

This form is for settlement information from licensed distributors (LDCs) for the Global Adjustment (GA) allocation for the adjustment period (e.g. July 1, 2017 to June 30, 2018).

The following information is requested for the base period (e.g. May 1, 2016 to April 30, 2017):

- Coincident generation values for Embedded Generation,
- Coincident demand values for Class A Consumers,
- Number of Class A consumers with peak demand between 0.5 MW (500 kW) and 1 MW
- Number of Class A consumers with peak demand between 1 and 5 MWs, and
- Number of Class A consumers with peak demand greater than 5 MWs

The IESO determines the peak hours in the base period and LDCs provide the total volume of electricity in kWh for embedded generation and Class A consumer consumption during those peak hours (Eastern Standard Time).

As the government of Ontario recently expanded the Industrial Conservation Initiative to qualify customers with a peak demand greater than 0.5 MW, there are now three distinct groups of Class A consumers. LDCs are required to provide the number of Class A consumers with peak demand between 0.5 MW and 1 MW, the number of Class A consumers with peak demand between 1 MW and 5 MWs, and the number of Class A consumers with peak demand greater than 5 MWs. Ontario Regulation 429/04 describes the different eligibility criteria for the three groups of Class A consumers.

The volume reported for embedded generation includes only those volumes that offset distributor load; total embedded generation volumes should not include injections to the IESO controlled grid. The volume reported for embedded generation includes all non-contracted generation and all contracted generation (Renewable Energy Standard Offer Program, Hydroelectric Contract Initiative and Feed-In Tariff Program). The contracted embedded generation volumes are reported regardless of the contract approval status.

Distributors are not required to provide the IESO with generation amounts for facilities that are eligible for net metering (Ontario Regulation 541/05) if that generation has offset the related load. If the generation is less than the related load for the given peak hour, no embedded generation is reported to the IESO. Embedded generation that results in injections into the IESO-controlled grid is also not included in the total embedded generation volumes submitted by LDCs. If the generation is greater than the related load, the amount injected to the LDC system should be submitted to the IESO.

Definitions for Class A Consumers and Embedded Generation that this form is applicable is detailed in Ontario Regulation 429/04 which can be found at:

<https://www.ontario.ca/laws/regulation/040429?search=429%2F04>.

Format

Follow the general submission rules (see Chapter 2) when entering data.

Embedded Generation is the total of all IESO contracted generation.

All subsections of this screen are in the following format:

Coincident Peak

Date	Hour Ending (HE)	Embedded Generation (kW)	Class A Consumer Consumption (kW)
Aug 10, 2016	16		
Sep 07, 2016	17		
Aug 11, 2016	17		
Jul 13, 2016	18		
Aug 12, 2016	17		

Class A Consumer Data

Number of Class A consumer with peak demand between 0.5 and 1 MWs	
Number of Class A consumer with peak demand between 1 and 5 MWs	
Number of Class A consumer with peak demand greater than 5 MWs	

5.16 NUG Adjustment Amount Information

The Ontario Electricity Financial Corporation (OEFEC) uses this screen to submit non-utility generator (NUG) adjustment amounts and forecasts.

5.17 Global Adjustment Amount Information

The IESO uses this screen to submit data on global adjustment amounts.

5.18 Procurement Contracts

Details

The IESO has entered into individual procurement contracts for renewable generation supplied by Biomass Non-Utility Generation (NUG) and Energy from Waste (EFW) suppliers.

These contracts are not part of any pre-existing IESO programs. Each contract will be settled directly by the respective Local Distribution Company (LDC). The LDC will submit the difference between the contracted price and the wholesale market price to the IESO on a monthly basis. The information will be processed as a manual line item for the last trading day of the month.

Format

Follow the general submission rules (see Chapter 2) when entering data.

There is only one subsection, presented in the following format:

Submit	Submission Window: 08/01/2015 - 08/28/2015			
				Clear Fields Void Submission
Select a procurement contract:		Biomass Non-Utility Generation Contract		
		kWh		\$
Payment to IESO				
Payment from IESO				
Add Information to Table				

Submission Information

Contract Name	Payment to IESO (kWh)	Payment to IESO (\$)	Payment from IESO (kWh)	Payment from IESO (\$)
Submit Submission Window: 08/01/2015 - 08/28/2015				

5.19 Ontario Electricity Support Program (OESP) – LDC & USMP

Details

The Ontario Electricity Support Program (OESP) was established by the Ministry of Energy to provide assistance to eligible low-income electricity consumers following the conclusion of the Ontario Clean Energy Benefit (OCEB) on December 31, 2015. Based on income level and household size, the qualified low-income electricity consumers will receive a predetermined credit on their electricity bills.

This form is used by the licensed distributors and unit sub-meter providers to recover their monthly OESP credit disbursed to the eligible consumers for the current settlement period.

The licensed distributors and unit sub-meter providers need to submit their monthly OESP claims for each applicable consumer class. For each consumer class, users need to provide the total number of recipient and total credit disbursed. The sum of payments entered for all thirteen consumer classes (Class A to M) is displayed in the **Total Payments from IESO (\$)** field right after the claim is added to the claims table (not shown) at the bottom of the screen.

Licensed distributors are also required to submit claims for their embedded distributors who are entitled for compensation. A licensed distributor must add one claim for each individual embedded distributor in the submission. The form allows licensed distributors to include multiple claims in their submission.

OESP Charge - Payments to IESO (\$) field is disabled to all Market Participants as the OESP charge is no longer being funded as a per kilowatt hour charge on electricity bills, effective May 1, 2017.

Format

Follow the general submission rules (see Chapter 2) when entering data.

Participant/Service Program Type	--- Select Program Type ---	
Embedded Distributor Name:		☐ Embedded Distributor
Class A Consumers - Tariff Code T10	No. of Recipients	Payments from IESO(\$)
Class B Consumers - Tariff Code T11		
Class C Consumers - Tariff Code T1		
Class D Consumers - Tariff Code T2		
Class E Consumers - Tariff Code T12		
Class F Consumers - Tariff Code T3		
Class G Consumers - Tariff Code T13		
Class H Consumers - Tariff Code T4		
Class I Consumers - Tariff Code T5		
Class J Consumers - Tariff Code T6		
Class K Consumers - Tariff Code T7		
Class L Consumers - Tariff Code T8		
Class M Consumers - Tariff Code T9		
Total Payments from IESO (\$)		
QESP Charge		Payments to IESO(\$)

Add Information to Table

Complete the fields and then click the **Add Information to Table** button.

The bottom of the screen (not shown) lists all the claims entered for the current submission window, and also allows you to delete entries.

Repeat these steps if you need to submit more than one entry. When all entries have been added, you then remit the claims by clicking the **Submit** button.

5.21 Ontario Electricity Support Program (OESP) – Prior Month Adjustments

Details

The Ontario Electricity Support Program (OESP) was established by the Ministry of Energy to provide assistance to eligible low-income electricity consumers following the conclusion of the Ontario Clean Energy Benefit (OCEB) on December 31, 2015. Based on income level and household size, the qualified low-income electricity consumers will receive a predetermined credit on their electricity bills.

This form is used by all OESP participants (licensed distributors, unit sub-meter providers, central service providers and Ministry of Finance) to make dollar adjustment to any OESP amount submitted through either the OESP- LDC & USMP form or the OESP – Service Providers form in the months prior to the current settlement period. OESP participants must add one claim for each applicable adjustment month. The form allows participants to add multiple claims in one submission.

Licensed distributors will submit adjustment claims on behalf of their embedded distributors. Licensed distributors must create one claim for each embedded distributor for each adjustment month.

Format

Follow the general submission rules (see Chapter 2) when entering data.

The screenshot shows a web form titled "Submission Window: 10/01/2015 - 10/30/2015". At the top left is a "Submit" button. The form contains several fields: "Participant/Service Program Type" with a dropdown menu labeled "-- Select Program Type --"; "Embedded Distributor Name" with a text input field; "Year" with a dropdown menu labeled "-- Select Year --"; "Month" with a dropdown menu labeled "-- Select Month --"; "Payments to IESO" with a text input field; and "Payments from IESO" with a text input field. To the right of the "Embedded Distributor Name" field is a checkbox labeled "Embedded Distributor". At the bottom of the form is a button labeled "Add Information to Table".

Complete the fields and then click the **Add Information to Table** button.

The bottom of the screen (not shown) lists all the data entered for the current submission window, and also allows you to delete entries.

Repeat these steps if you need to submit more than one entry. When all entries have been added, you then remit the claims by clicking the **Submit** button.

5.22 Ontario Rebate for Electricity Consumers (OREC) – LDC

Details

The Ontario Rebate for Electricity Consumers Act rebates the provincial portion of harmonized sales tax (HST), which is 8%, to eligible consumers directly on their electricity bills, effective January 1, 2017.

This form is for Market Participant Distributors to claim the 8% financial assistance that is provided to consumers that have eligible accounts with them; with any of their wholly-embedded distributors; and with any licensed retailers that use retailer-consolidated billing and that conduct business in their service area or the service area of any of their wholly-embedded distributors.

In the **Ontario Rebate for Electricity Consumers-LDC** screen, report the current month's 8% rebate provided on customer bills. Any adjustments to the previous month can also be submitted.

Format

Follow the general submission rules (see Chapter 2) when entering data.

All subsections of this screen are in the following format:

	Payments to IESO	Payments from IESO	
Current Month Claim \$			
Previous Month Adjustments \$			To Top

5.23 Ontario Rebate for Electricity Consumers (OREC) – Unit Sub-Meter Provider

Details

The Ontario Rebate for Electricity Consumers Act rebates the provincial portion of harmonized sales tax (HST), which is 8%, to eligible consumers directly on their electricity bills, effective January 1, 2017.

This form is for unit sub-meter providers to claim the 8% financial assistance provided by them on their fees and charges for unit sub-metering that appear on invoices issued by them to consumers that are entitled to receive financial assistance.

In the **Ontario Rebate for Electricity Consumers-Unit Sub-Meter Provider** screen, report the current month's 8% rebate provided on the administrative charges portion of customer bills. Any adjustments to the previous month can also be submitted.

Format

Follow the general submission rules (see Chapter 2) when entering data.

All subsections of this screen are in the following format:

Current Month Claim \$	Payments to IESO	Payments from IESO	To Top
Previous Month Adjustments \$			

5.24 Ontario Fair Hydro Plan (OFHP) for Eligible Non-RPP Customers

Details

The Ontario Fair Hydro Plan applies to all Ontario customers that are eligible for the RPP, including those that have opted out of the RPP in favor of the market-based pricing or a retail contract, as well as non-RPP customers that are eligible for the Ontario Rebate for Electricity Consumers (see Section 5.22).

Effective July 1, 2017, report the previous month's OFHP discount for eligible non-RPP customers, calculated using the GA Modifier published by the Ontario Energy Board, in the **Ontario Fair Hydro Plan (OFHP) for Eligible Non-RPP Customers** screen.

Format

Follow the general submission rules (see Chapter 2) when entering data.

Number of Non-RPP Customers			
		Payments to IESO	Payments from IESO
Current Month Claim	\$		\$
	kWh		kWh
Previous Month Adjustments	\$		\$
			To Top

5.25 Distribution Rate Protection (DRP)

Details

The Distribution Rate Protection (DRP) program provides for a cap on the amount that eligible customers can be charged for base distribution charges, which consist of the base monthly fixed service charge and base variable distribution charge. The cap applies to electricity consumed on or after July 1, 2017.

Distributors and customers that are eligible for the DRP program are described in the DRP Regulation, O. Reg. 198/17.

This form is used by the DRP-eligible distributors to recover the DRP amount applied to their DRP-eligible consumers.

Format

Follow the general submission rules (see Chapter 2) when entering data.

Maximum Fixed Distribution Charge (A)		36.43	
Total Number of Consumers (B)			
Total Distribution Charges(\$) (C)		\$	
Total Max. Fixed Distribution Charges for Eligible Consumers(D)		\$	
		Payments to IESO	Payments from IESO
Current Month Claim	\$		\$
Adjustments for Previous Month	\$		\$

5.26 First Nations On-Reserve Delivery Credit (FNDC)

Details

The First Nations On-Reserve Delivery Credit (FNDC) program applies to a customer of a licensed distributor (FNDC distributor) that occupies residential premises located on or within a reserve within the meaning of the federal Indian Act if the customer is a member of a band within the meaning of that Act and has an account with the FNDC distributor that falls within a residential-rate classification (FNDC-eligible customer). FNDC-eligible customers will receive a 100% credit to fully off-set the costs covered by the delivery line. The FNDC credit applies with respect to electricity consumed on or after July 1, 2017.

Distributors and customers that are eligible for the FNDC program are described in the FNDC Regulation, O. Reg. 197/17.

This form is used by FNDC-eligible distributors to recover the FNDC amount applied to their FNDC-eligible consumers.

Format

Follow the general submission rules (see Chapter 2) when entering data.

Number of Consumers receiving FNDC Only			
Number of Consumers receiving both FNDC and RRRP			
Total Delivery Charges before RRRP Credit		\$	
Total Delivery Charges after RRRP Credit		\$	
		Payments to IESO	Payments from IESO
Current Month Claim	\$		\$
Adjustments for Previous Month	\$		\$

5.27 Rural or Remote Rate Protection (RRRP) – Fixed Rate Credit

Details

The Rural or Remote Electricity Rate Protection (RRRP) program is designed to provide financial assistance to eligible customers located in rural or remote areas where the costs of providing electricity service to these customers greatly exceeds the costs of providing electricity to customers located elsewhere in the province of Ontario.

Effective July 1, 2017, consumers in a rural area referred to in subsection 79 (2) of the Ontario Energy Board Act and consumers referred to in paragraph 2 of section 2 of the RRRP regulation (O. Reg. 442/01) will receive a fixed rate credit of \$60.50 per month for electricity consumed on or after July 1, 2017.

This form is used by the eligible distributor to recover the RRRP fixed rate credit amount applied to their eligible consumers.

Format

Follow the general submission rules (see Chapter 2) when entering data.

RRRP Fixed Rate Credit (A)		\$	60.50
Number of Consumers (B)			
Total Delivery Charges before RRRP Credit (C)		\$	
Total Delivery Charges after RRRP Credit (D)		\$	
		Payments to IESO	Payments from IESO
Current Month Claim	\$		\$
Adjustments for Previous Month	\$		\$

