



RIOO User Guide – Updating an Existing Load Resource

Version 2.0
November 11, 2024

ERCOT RIOO Resource Services

To update an existing Load Resource (LR) site and to get the change into the ERCOT Network Model, the Resource Entity (RE) representing the site must use the Resource Integration and Ongoing Operations – Resource Services (RIOO – RS) application. RIOO – RS allows the RE to submit a Change Request (CR) online to update the registration information for an existing Load Resource. The ERCOT Demand Integration team will review and process the CR, which will display status changes in RIOO throughout the timeline from the initial review of the request to getting the update loaded into the production Network Model.

About this guide

This guide provides information about performing the tasks in RIOO – RS to create and submit the CR that proposes updates to an existing LR in the ERCOT Network Model. Any sample data used to demonstrate the application is fictitious and does not represent actual LR registration data or market activity for any Resource Entity or Transmission and/or Distribution Service Provider (TDSP) used in the samples. The samples are test data created to provide visual aids for this user guide.

Customers who can change their Load in response to a Dispatch instruction and can meet certain performance requirements may qualify to become LRs. Qualified LRs may participate in ERCOT's real-time energy market through Security-Constrained Economic Dispatch (SCED) and/or qualify to provide any of the following Ancillary Services (AS): ERCOT Contingency Reserve Service (ECRS), Non-Spinning Reserve (Non-Spin), Regulation Down Service (Reg-Down), Regulation Up Service (Reg-Up), and Responsive Reserve (RRS).

In the ERCOT markets, the value of an LR's Load reduction is equal to that of an increase in generation by a generating plant. LRs in SCED submit bids to buy power up to their specified level and are instructed by ERCOT to reduce Load if wholesale market prices equal or exceed that level. LRs that are scheduled or selected in the ERCOT Day-Ahead AS Market are eligible to receive a capacity payment regardless of whether they are dispatched in Real-Time.

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Before starting your Change Request

Before starting your CR, be sure that you have done the following tasks:

Sign up for a RIOO Services User Account for a Resource Entity

- The user must be associated with a registered Resource Entity (RE).
- The RE's User Security Administrator (USA) must add the RIOORS_M_Operator role to the user's Market Participant Identity Management (MPIM) profile, commonly known as the digital certificate.
- After the role is added, an email request will be sent to complete the process of creating the user account, which involves changing the system-assigned password and associating your login information with a multifactor authentication (MFA) app on your mobile phone that verifies your login attempts.
- The **RE Sign Up Guide** provides more details for signing up for a RIOO Services User Account. This guide is available on the [Resource Integration webpage](#), under **RIOO Documentation**.

Coordinate a Production Load Date (PLD)

When creating a CR to update an existing LR, the RE will need to request a PLD in RIOO during the registration process. The RE should coordinate the PLD via email with the ERCOT Demand Integration team (ERCOTLRandSODG@ercot.com). This coordination is not required, but it can help ensure that the requested PLD is acceptable for modeling the LR update.

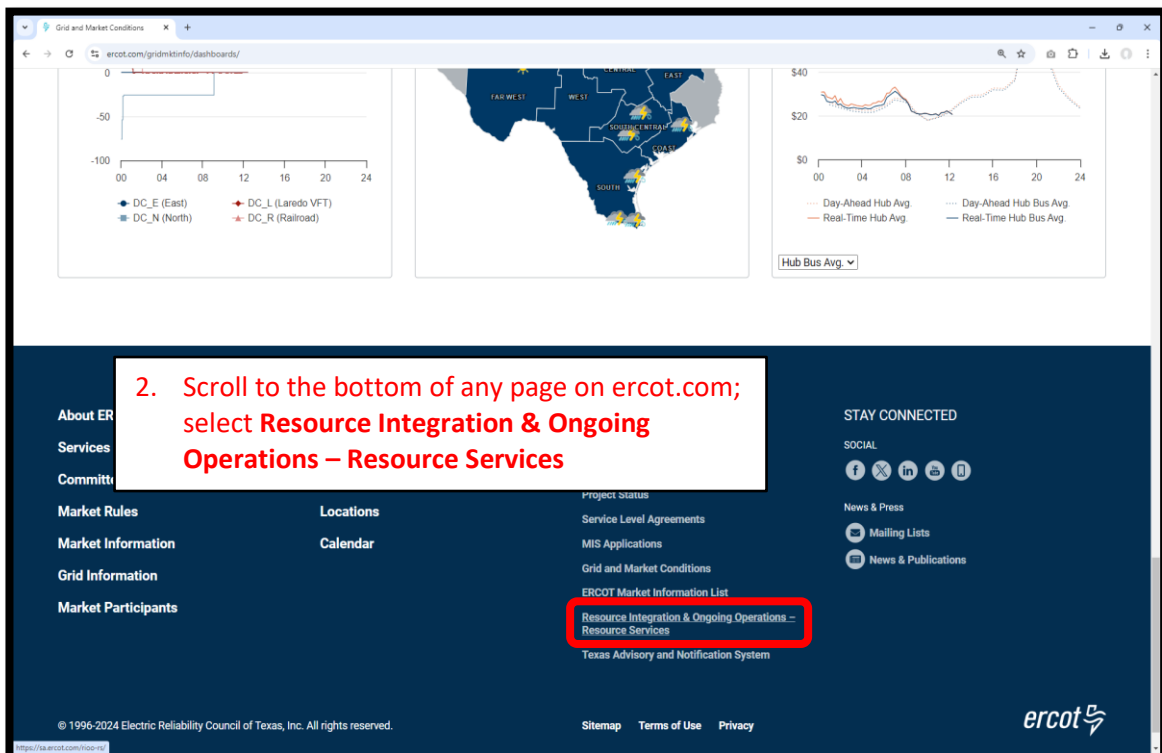
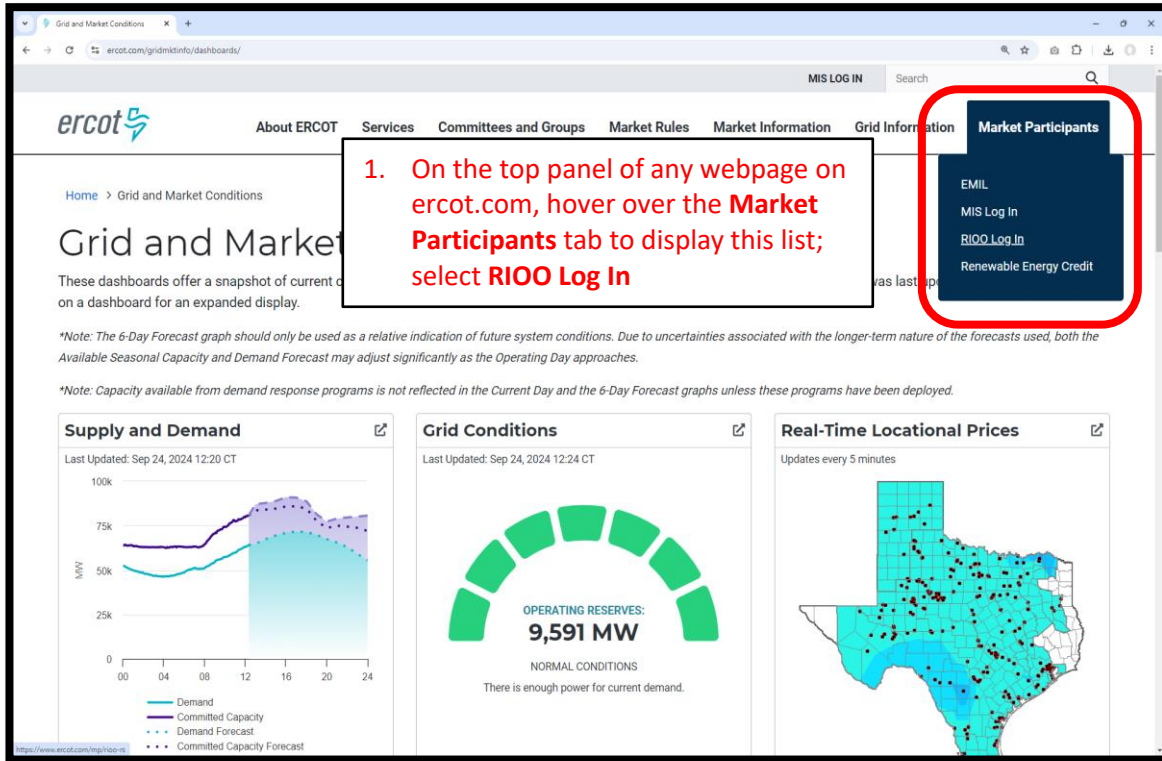
- The PLD must align with a scheduled production model load as listed on the current [Production Load Schedule](#).
- The timelines for LR updates are different depending on the type of change being requested
 - Most updates require the RIOO submission to be completed at least **30 days** before the requested PLD. These include stopping an LR, changing the operating limits (such as the High Reasonability Limit), or moving the LR to another location in the Network Model. Note that any mapping location changes must be coordinated with the associated TDSP.
 - Owner or operator changes (assigning the LR to a different RE or QSE) will follow the same **45-day** timeline as submissions to register a new LR. The additional time is to facilitate approval of all required forms submitted to ERCOT (such as the QSE Acknowledgement or the DME form) and to setup any required ICCP telemetry points. The PLD will be at least **45 days** after the RIOO registration submission is accurately completed.
- The RIOO application may indicate that if the requested PLD is fewer than 90 days out, it is classified as an interim update. However, LR submissions meeting the appropriate 30-day or 45-day PLD schedule do not require the RE to submit the **RE_Model_Interim_Update_Request** form.

Important notes on Change Requests

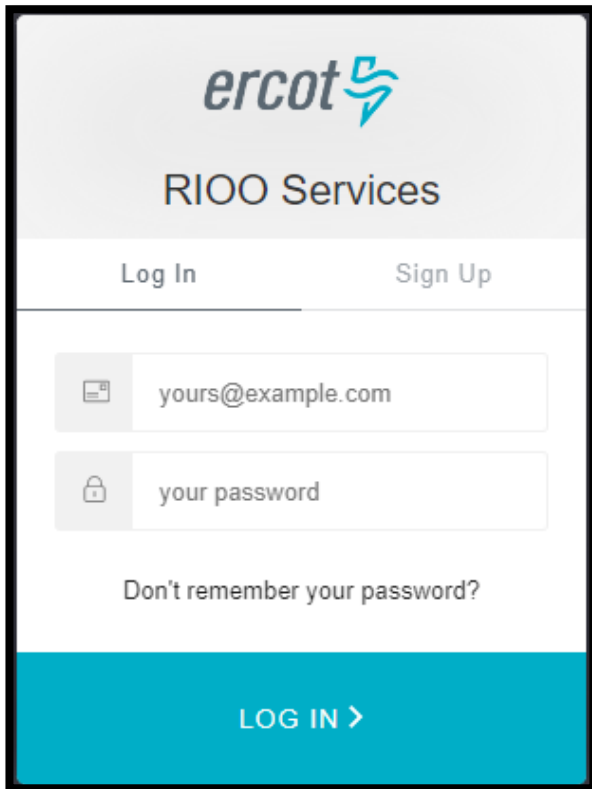
- Once a CR is submitted for an LR, no other CRs can be submitted for that same LR until the in-progress CR is effective in the production Network Model. This restriction is to prevent conflicting changes that couldn't be properly validated against an unknown model state.
- When a CR is submitted to stop an LR, no other CRs can be submitted for that same LR. See further details on [Stopping an existing LR](#) in this guide.
- An RE can't stop one LR and start another LR on the same RIOO submission. RIOO – Interconnection Services (RIOO – IS) must be used to start a new LR, and RIOO – Resource Services (RIOO – RS) must be used to stop an existing LR.
- Based on the current [ERCOT Fee Schedule](#), these are the potential fees to be charged for submitting a CR for a Load Resource:
 - Fee to register a new LR = \$500 (only done in RIOO – IS)
 - Fee to update an existing LR:
 - \$500 if the High Reasonability Limit (HRL) is increased by 20% or more from the existing HRL (not an accumulated change)
 - \$500 to change an existing LR registration between controllable (CLR) and non-controllable (NCLR)
 - Requires stopping the existing LR and registering a new LR with a unique DAC
 - No fee for other updates
- No fee to stop an existing LR or to change the owner (RE) for an LR
- All fees are collected in RIOO during the submission process and must be paid before the submission can be completed
 - If there are multiple LRs subject to fees in the same RIOO submission, the total amount of fees due will be charged in the same invoice
- ***Refunds of fees paid will not be considered unless ERCOT directs a change in the registration process that results in additional fees being charged***

Logging into RIOO

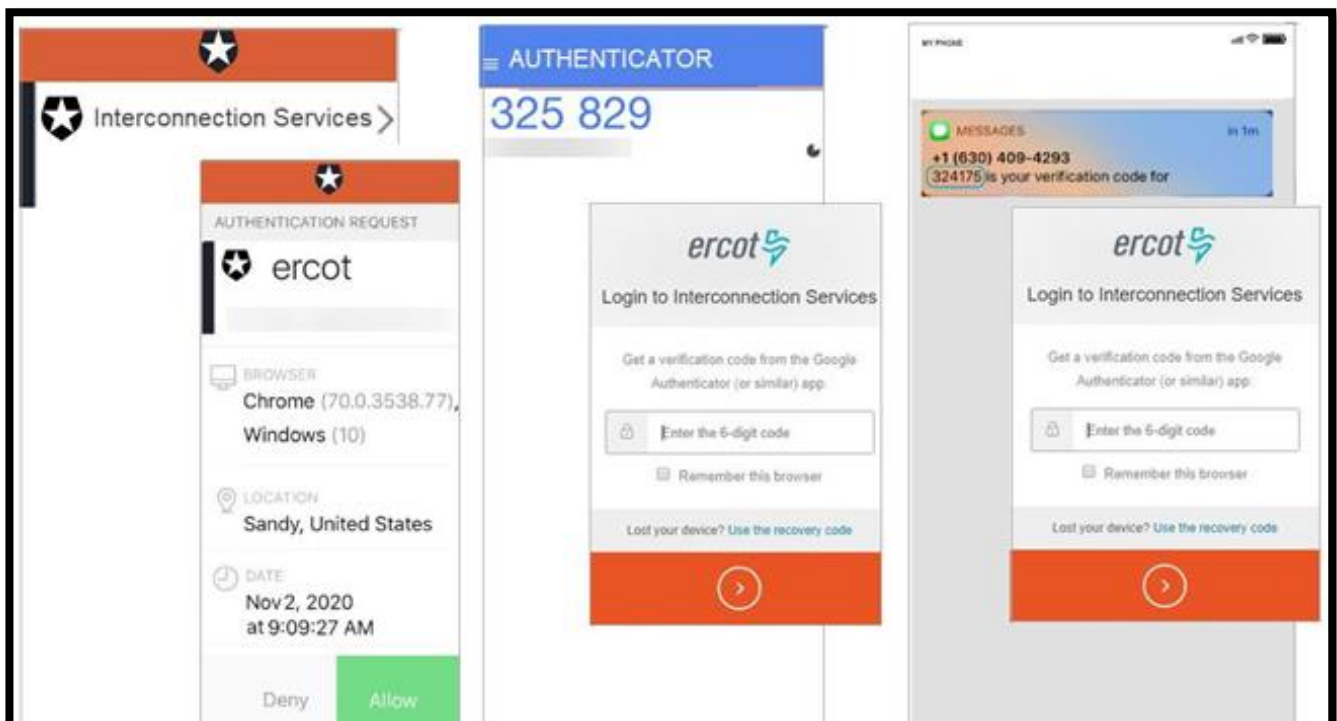
- There are two ways to access the RIOO application login screen. After a successful login, any of the RIOO application panels can be bookmarked for more direct access.



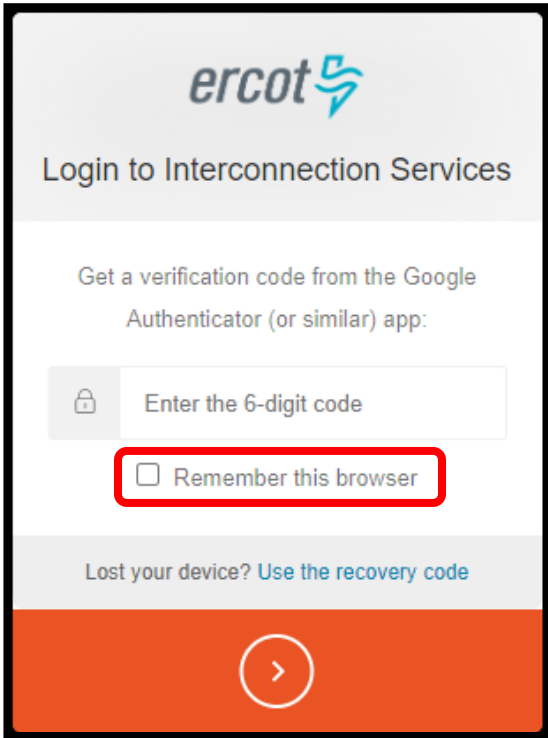
- Log into your RIOO account:



- You'll be prompted to enter a 6-digit code to complete the multi-factor authenticator (MFA). The MFA code will be sent to the app selected when setting up your account (Auth0 Guardian, Google Authenticator, SMS Text Authentication, or another authentication program that you chose to use).



- Select **Remember this browser** to avoid having to login multiple times:



- After successfully logging in, you'll be taken to the RIOO home screen:

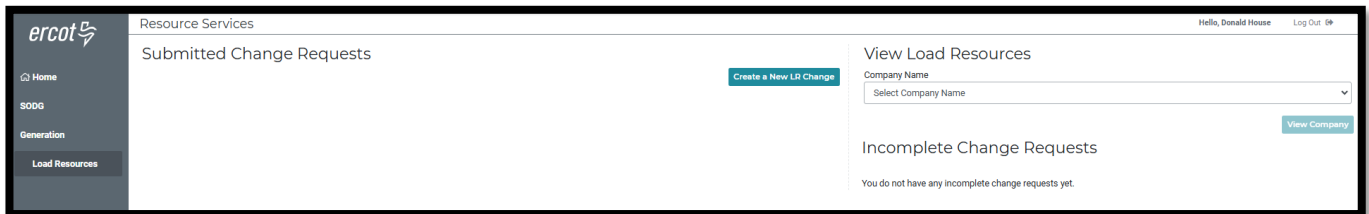


Overview of RIOO Resource Services

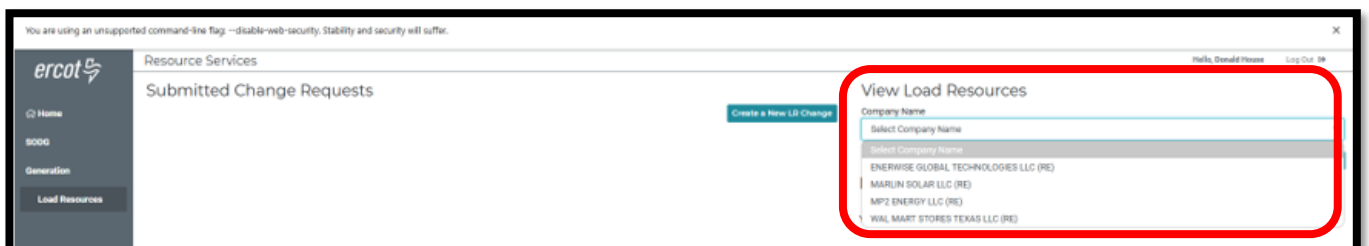
- On the RIOO home screen, open Resource Services by clicking on the **Load Resource** button
 - Resource Services is used to update an existing LR
 - Interconnection Services is used to create a new LR
 - See **RIOO User Guide – Creating a New Load Resource** on the [Load Resources webpage](#) for details



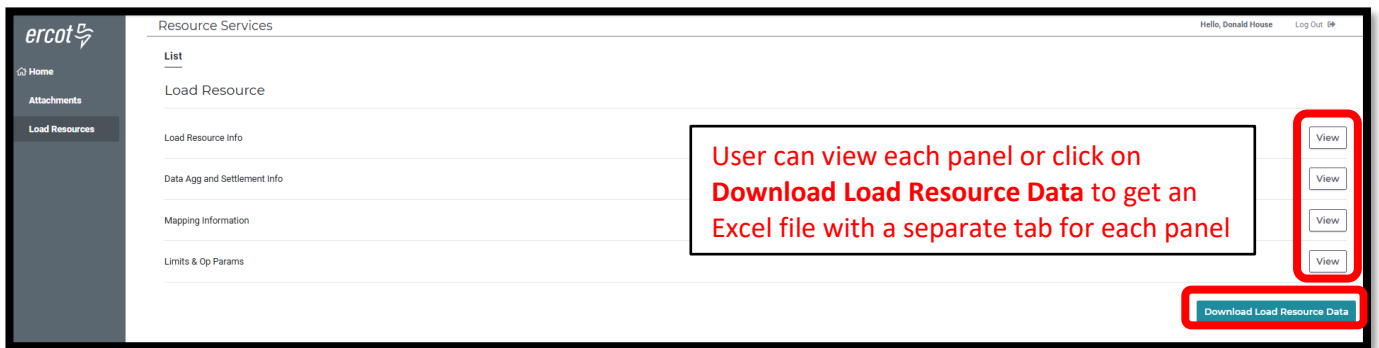
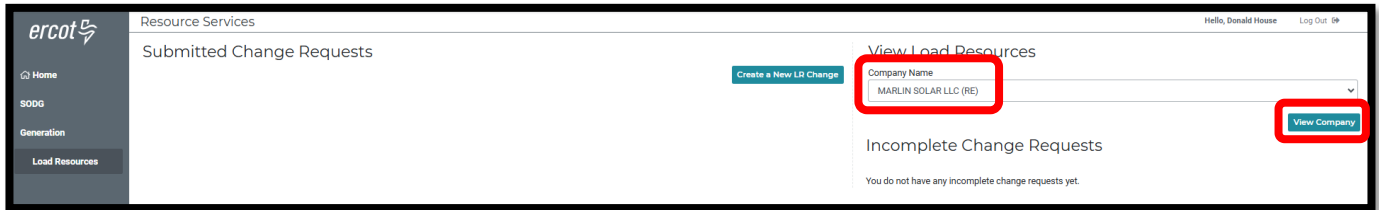
- The change request dashboard is displayed



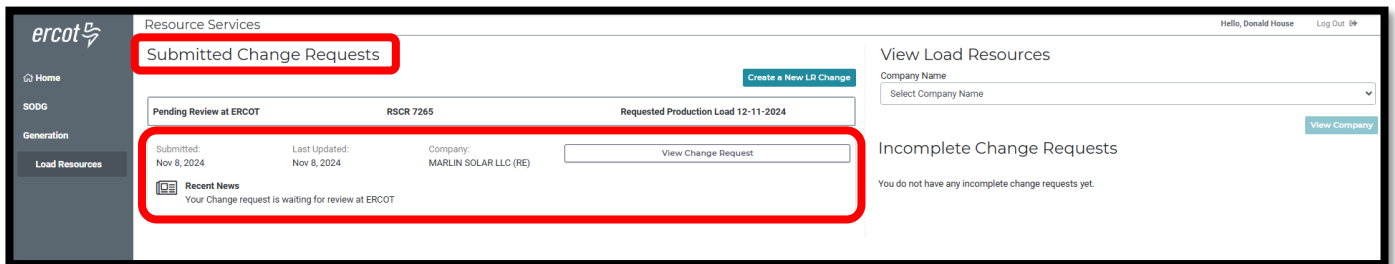
- The dashboard allows the user to view their existing LRs and their current CRs
 - View all existing LRs associated with each Resource Entity represented by the user in the dropdown list under **Company Name**
 - **Users are highly encouraged to verify their existing LR data periodically, especially after a CR is processed and updated in the Network Model**



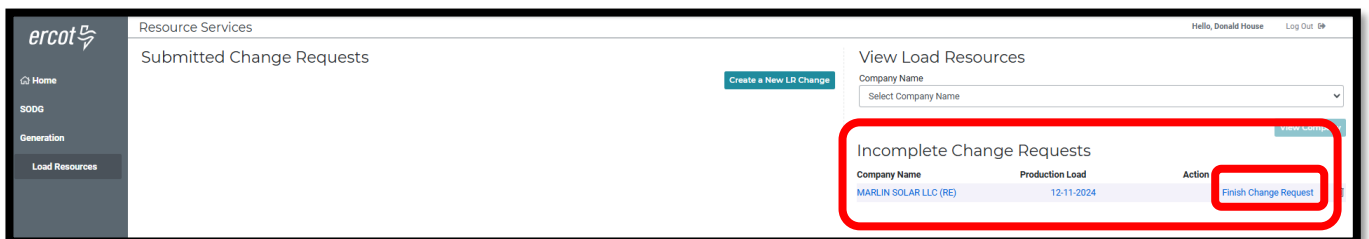
- If the user selects one of the listed REs, and then clicks on **View Company**, the user can view all existing registration data for the LRs represented by that RE



- The user can view CRs that have been submitted but not yet added to the Network Model; the associated status is displayed in the **Recent News** text (more details on the status changes will be provided later in this guide)

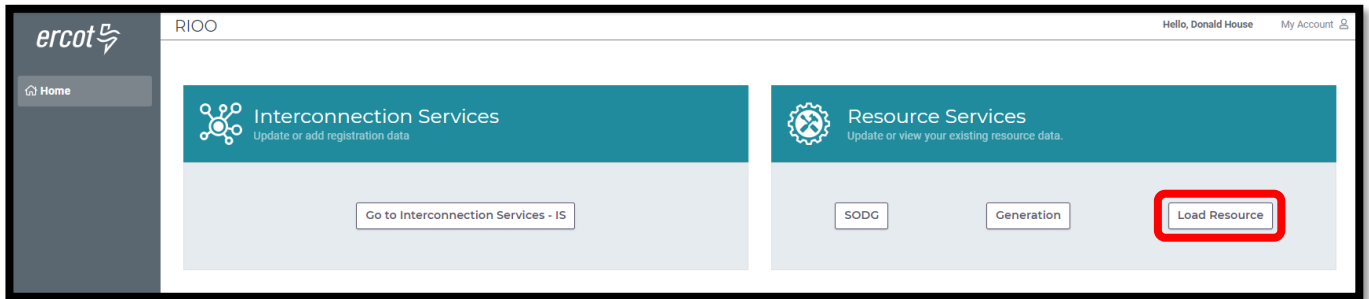


- The user can also view CRs that have been started but not yet submitted to ERCOT
 - The user can click on **Finish Change Request** to open and continue the CR

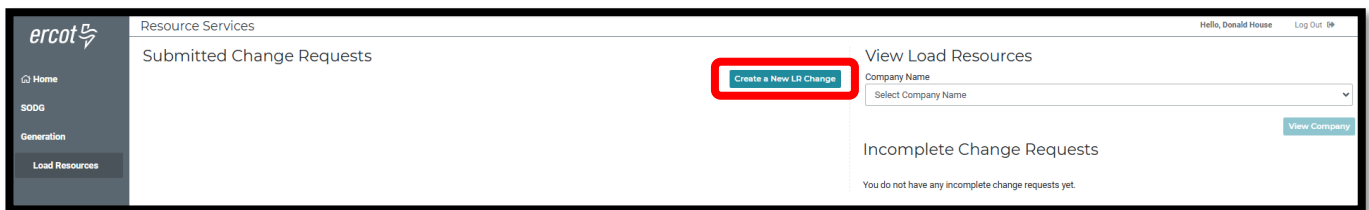


Change request for an existing LR

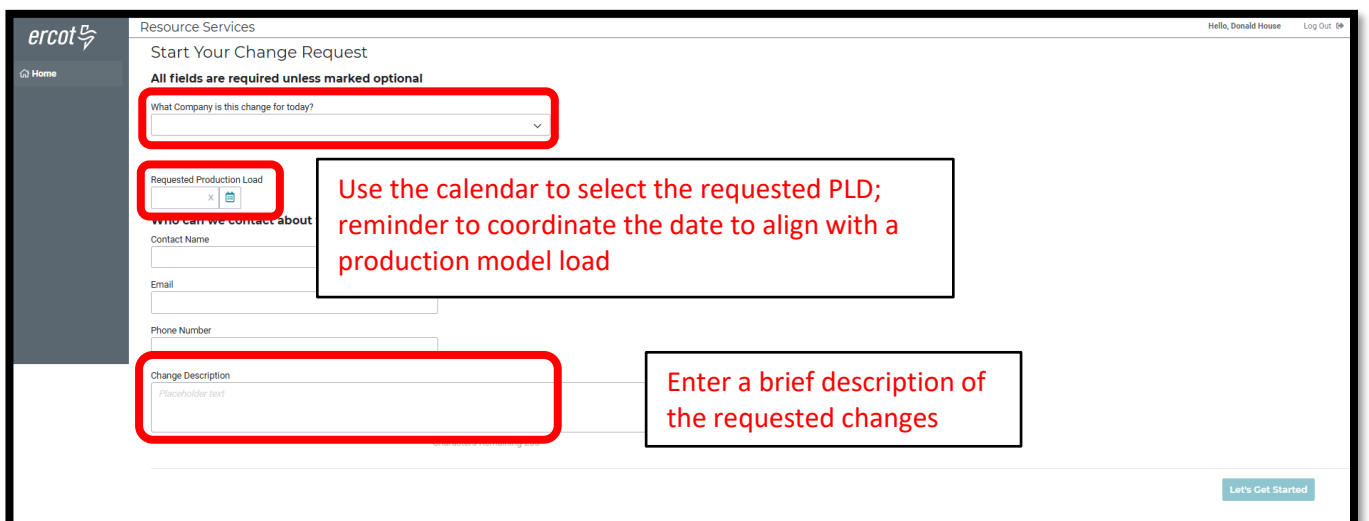
- On the RIOO home screen, open Resource Services by clicking on the **Load Resource** button



- On the change request dashboard, click on **Create a New LR Change**



- Select which RE the update is for from the **What Company is this change for today?** drop-down list
 - Note that the user will see a list of all REs represented by the user in their RIOO account
- Enter the contact information and a brief description of the requested changes




- Sample completed Start Your Change Request panel

- On the LR List screen, all data submission panels are listed along with a **View** panel to see all data at once
 - **Start** indicates that nothing has been updated on that panel
 - **Edit** in red indicates that the panel is either missing required information or that something needs to be corrected
 - **Edit** in green indicates that the panel has been completed but the user has the option to go back to the panel to make revisions
 - Clicking on **Edit** or **Start** will open that panel for data entry
- The user only needs to open the panels for which updates will be submitted
 - ***This guide will provide one example of an update; there are too many possible scenarios to capture all of them or to determine which examples would be the most helpful***
 - The same data validation rules will be applied as they are when a new LR is created
 - Any questions or issues with specific updates can be directed to the ERCOT Demand Integration team (ERCOTLRandSODG@ercot.com) for assistance
 - Progress can be saved, allowing the user to return to the application later to finish the submission

The screenshot displays the ERCOT Resource Services web application. The top navigation bar includes the ERCOT logo, the text 'Resource Services', and a user profile 'Hello, Donald House' with a 'Log Out' link. A secondary navigation bar contains 'List', 'View', 'Load Resource Info', 'Data Agg and Settlement Info', 'Mapping', and 'Limits'. The main content area is titled 'Load Resource' and features a 'View' button, followed by sections for 'Load Resource Info', 'Data Agg and Settlement Info', 'Mapping Information', and 'Limits & Op Params', each with a 'Start' button. A red callout box with a black border and red text is positioned over the 'View' button, stating: 'Click **View** to see the current details from all panels for each LR represented by this RE'. The 'View' button itself is also enclosed in a red square. At the bottom right, there are 'Continue' and 'Done or Check Progress' buttons. A dark sidebar on the left contains navigation options: 'Home', 'My Change Info', 'Attachments', and 'Load Resource'.

- Sample of View details for the selected RE (only 1 registered LR for this test RE)



Home

My Change Info

Attachments

Load Resource

Resource Services Hello, Donald House [Log Out](#)

List **View** Load Resource Info Data Agg and Settlement Info Mapping Limits

View

Back
Continue Done or Check Progress

Load Resource Information

Go To Section	GEORSO_LDS
Common Name for LR	GT TEST LR
Physical Street Address for Point of D...	24 Eagle Way
Name of City for Point of Delivery (PO...	Georgetown
Stop Date	

Data Agg and Settlement Info

Go To Section	GEORSO_LDS
ERCOT Load Zone	South
Meter Reading Entity (MRE)	ONCOR ELECTRIC DELIVERY COMPANY LLC (TDSP) (DUNS: 1039940674000)
TSP	ONCOR ELECTRIC DELIVERY COMPANY LLC (TDSP) (DUNS: 1039940674000)
ESI ID Assigned to Meter	12345678987654321
Resource ID (RID)	
Effective Date	11-05-2024
Is load behind a NOIE settlement met...	No
Is load netted from generation at ERC...	No
Is this a wholesale delivery point?	No
Load Resource Controlling Device	Control Technology / Interruptible Switch / Circuit Breaker

Mapping Info

Go To Section	GEORSO_LDS
Transmission Service Provider	ONCOR ELECTRIC DELIVERY COMPANY LLC (TDSP) (DUNS: 1039940674000)
Is this a Private Use Network (PUN)?	No
Substation Information	
Is this Load Resource part of an Energ...	
Substation Code for POD	GEORSO
Substation Code for POD (New)	
Transmission Information	
Transmission Bus POD ~ PTT Bus #	7532
Transmission Station Voltage	138
Transmission Station Load Name in N...	GEORSO_T1
Dispatch Asset Code	GEORSO_LDS

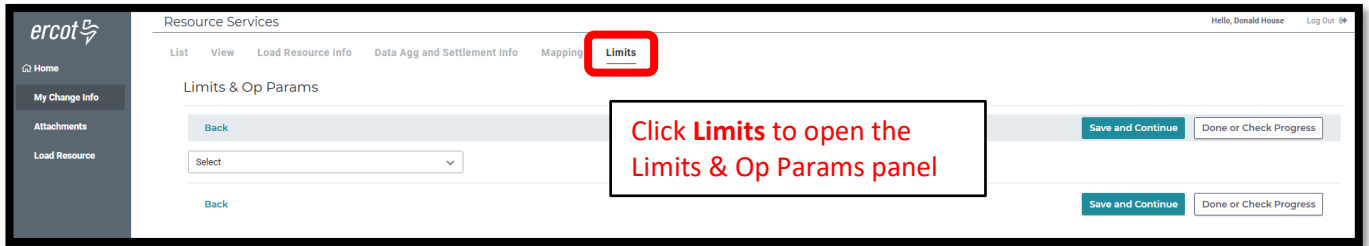
Load Resource Limits Info

Go To Section	GEORSO_LDS
Load Resource Type	UFR/Interruptible
Is this Load Resource an aggregated ...	
Maximum Loads	
Total Load at POD	10
Interruptible Load	10
Reasonability Limits	
High Reasonability Limit	10
Low Reasonability Limit	0
Reasonability Ramp Rate Limits	
High Reasonability Ramp Rate Limit	
Low Reasonability Ramp Rate Limit	
Minimum Interruption Time	2
Minimum Restoration Time	6
Max Weekly Deployments	14
Max interruption Time	8
Max Daily Deployments	2
Max Weekly Energy	1680
Min Notice Time	10
CLR Resource Parameters	
Max Deployment Time	
Max Weekly Energy	
Normal Ramp Rate Curves	
MW Rating	
Upward	
Downward	
Emergency Ramp Rate Curves	
MW Rating	
Upward	
Downward	

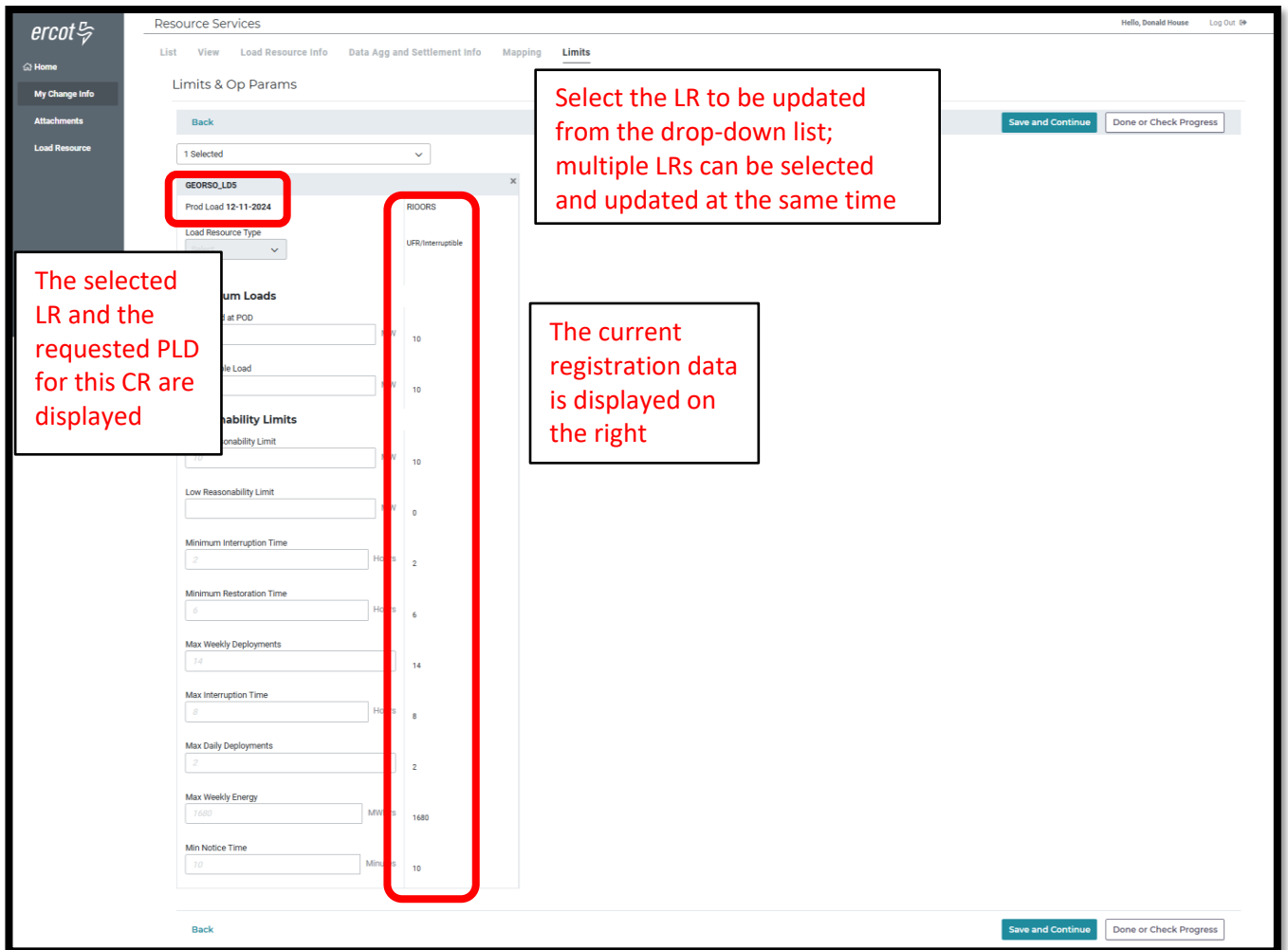
Back
Continue Done or Check Progress

Change Request example

- This example will update both the Limits & Op Params (this CR will trigger a registration fee)



- When selecting the LR, multiple LRs can be selected on the panel and updated at the same time
 - Different data can be updated for each LR
 - For example, the user can update the **High Reasonability Limit** for one LR and update the **Min Notice Time** for another LR on the Limits & Op Params panel at the same time
- The user can also select different LRs to update on each panel
 - For example, the user may update LR_1 on the Mapping Information panel and update LR_2 on the Limits & Ops Params panel in the same CR



The LR being updated by this CR is displayed

Click **Save and Continue** to move to the next panel or click on **Done or Check Progress** to return to the LR List screen

Updates to the **Total Load at POD, Interruptible Load, High Reasonability Limit, and Max Weekly Energy** are entered by the user

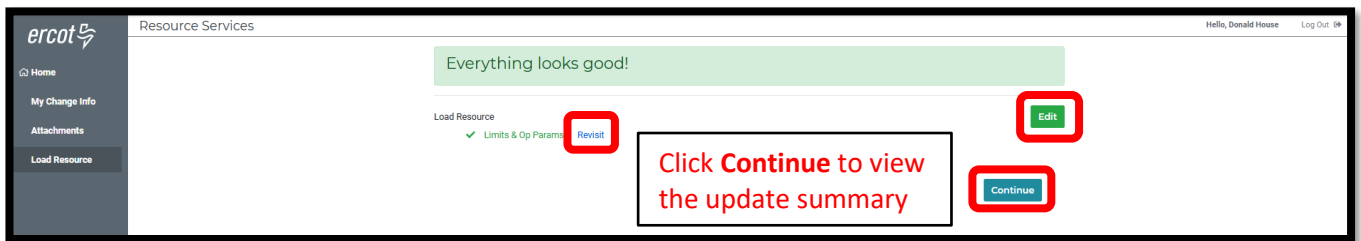
Buttons: **Save and Continue**, **Done or Check Progress**

Click **Continue** or **Start** for another panel to make more updates; Click **Done or Check Progress** to view the update dashboard

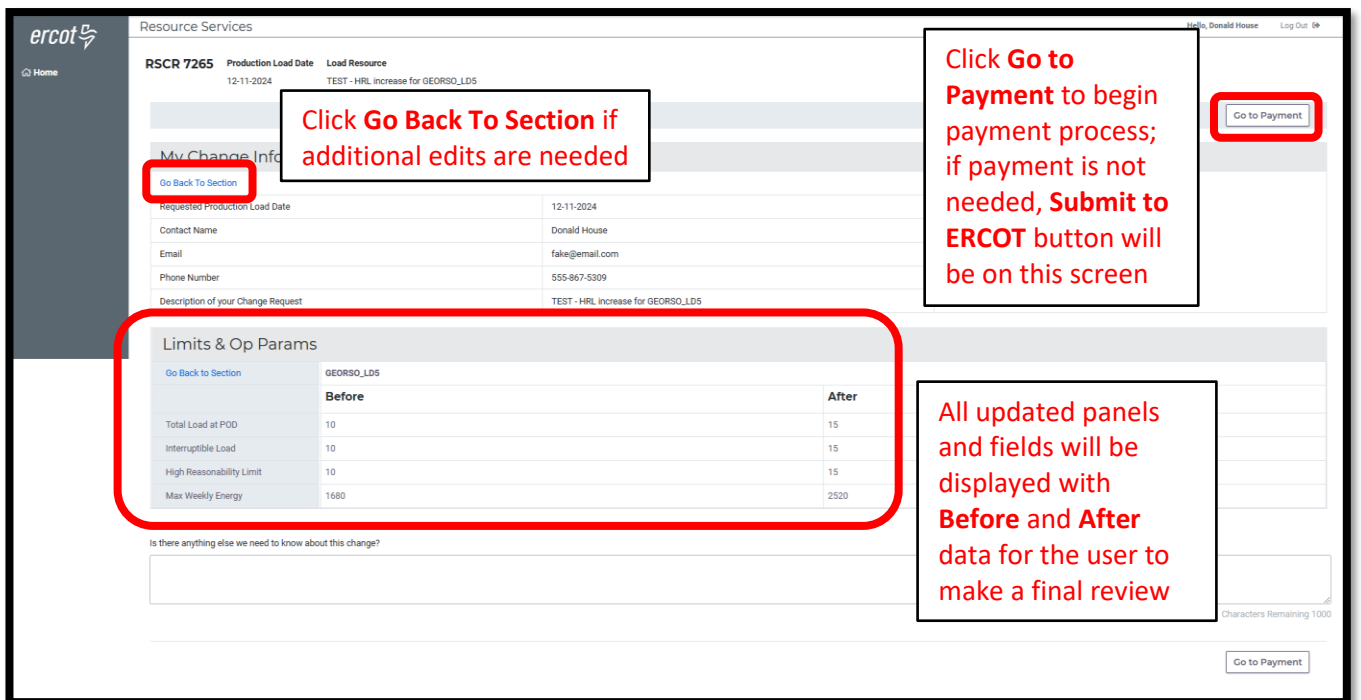
A green **Edit** button means that initial data validation is passed; no further edits are required on that panel

Buttons: **Continue**, **Done or Check Progress**, **Edit**

- On the update dashboard, all data submission panels that have been updated will be displayed
 - Click on **Revisit** to return to any of the data entry panels
 - Make Corrections** in red indicates that the panel is either missing required information or that something needs to be corrected
 - Any needed corrections will also cause **Edit** to appear in a red box
 - Edit** in a green box indicates that all updated panels pass initial validations, but the user has the option to go back to any panel to make revisions



- The user has an option to click **Download Load Resource Data** to download an excel file containing the existing information on each panel
 - Note that this download does not show before and after data; it is intended to be a record of all existing data for this LR before the CR is submitted



The screenshot shows the ERCOT invoice page for a load resource. The page includes the ERCOT logo and contact information. The invoice details are as follows:

INVOICE DATE	DUE TODAY
November 8, 2024	\$500.00

The invoice description is "TEST - HRL increase for GEORSO_LD5". The price is \$500.00. The total due is \$500.00. The change request number is RSCR 7265. The LR DAC is GEORSO_LD5. The invoice date is November 8, 2024, and the payment is due today. The user is prompted to click "Continue to Payment" to move on to the Payment screen.

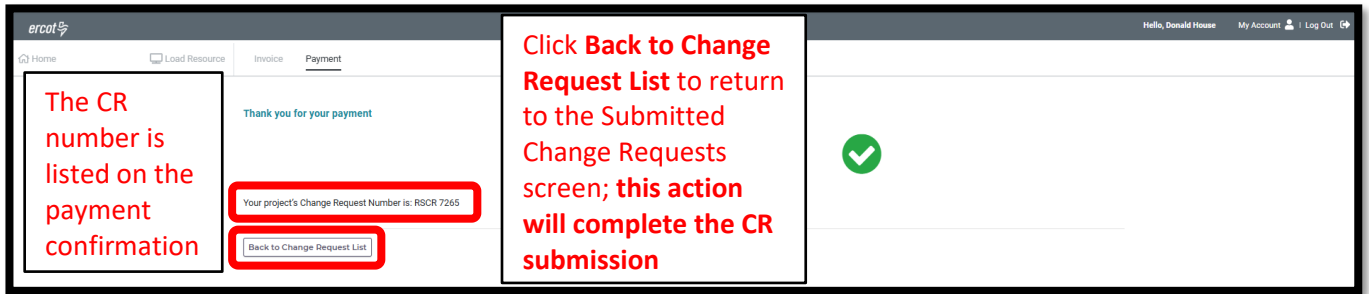
- Sample payment screen using credit card

The screenshot shows the ERCOT payment screen for credit card payment. The user is prompted to select "Credit Card" as the payment method. The invoice number is 7265. The user's email is pre-populated as dh_test@fastmail.com. The user is prompted to click "Pay" to complete the transaction and view the payment confirmation.

- Sample payment screen using bank account

The screenshot shows the ERCOT payment screen for bank account payment. The user is prompted to select "Bank Account (USA Only)" as the payment method. The invoice number is 7265. The user's email is pre-populated as dh_test@fastmail.com. The user is prompted to click "Pay" to complete the transaction and view the payment confirmation.

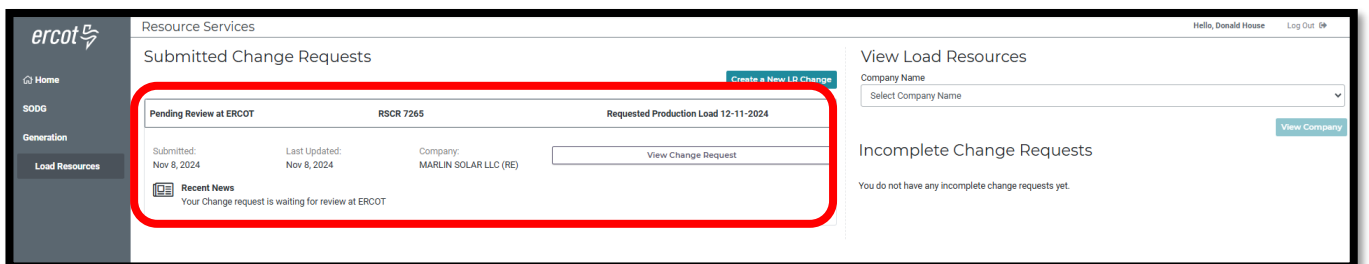
- Sample payment confirmation



- Back on the RIIO home screen, open Resource Services again by clicking on the **Load Resource** button



- The change request dashboard is displayed, and the submitted CR is listed (note that under **Recent News**, the status of the CR is **waiting for review at ERCOT**)
- As the CR is processed by ERCOT, the Recent News display is updated to let the user know the status
 - The final status of **modeled in NMMS** (network model management system) signifies that ECOT has verified the modeling request is approved for the scheduled model load on the PLD
 - The CR will no longer appear on this display after the changes go into Production on the PLD



- Click on **View Change Request** to view a summary of the changes
 - If a payment was required, the invoice and receipt will be attached
 - The user can also withdraw the CR from this screen
 - The user must confirm this selection to continue with the cancellation (can't be canceled after ERCOT changes the status to In Review)

The CR can still be canceled by clicking on **Withdraw Change Request**

Not so fast!

If you withdraw this change request, it will be gone forever!

Yes - withdraw change request No - don't withdraw

All updated panels and fields will be displayed with **Before and **After** data**

Limits & Op Params		GEORSO_LDS	
	Before	After	
Total Load at POD	10	15	
Interruptible Load	10	15	
High Reasonability Limit	10	15	
Max Weekly Energy	1680	2520	

Is there anything else we need to know about this change?

Characters Remaining 1000

RE/Ownership change for an existing LR

A data entry panel for an RE (owner) change for an existing LR is being developed in RIOO, but it does not currently exist. Changing the RE of an existing LR requires coordination between the current RE, the new RE, and ERCOT.

- The process typically starts with communication between the REs to discuss the ownership change and to determine when it should occur
 - The Demand Integration team can help coordinate this communication
 - Before accepting the ownership change, Demand Integration must receive email confirmation from both REs agreeing to the details of the change (preferably from the Authorized Representatives (ARs) or the back-up ARs)
 - The email is to be sent to ERCOTLRandLR@ercot.com and must include at least the following information:
 - Dispatch Asset Code for each LR being changed
 - Current RE name and DUNS #
 - Current QSE name and DUNS #
 - New RE name and DUNS #
 - New QSE name and DUNS #
 - Requested PLD (must be at least 45 days into the future and should be coordinated with Demand Integration)
- The new RE must have a QSE partnership in place
 - The new QSE must be qualified to represent LRs (at least a Level 3 QSE); and the new QSE will have to be capable of qualifying as a Level 4 to provide Ancillary Services from the LR
 - If any of the LRs being changed are Controllable LRs (CLRs), there must also be a Decision Making Entity (DME) registered ([Section 23 Form C: Managed Capacity Declaration](#))
 - The new QSE will have to complete the required Inter-Control Center Communications Protocol (ICCP) telemetry setup
 - See the [Load Resources webpage](#) for further details on QSE requirements
 - Any incomplete requirements will likely result in a delayed PLD for the change
- After the change confirmations are complete, the current RE must submit a CR to request the RE change
 - The CR is needed for ERCOT to have an archive of the RE change request saved within RIOO
 - In the CR, the submitter only needs to provide a description of the change
 - In the “Change Description” box, the current RE should type a note like: “Change the RE for the [‘DAC’] LR on ‘PLD’. Current RE: [‘Name and DUNS #’]; Current QSE: [‘Name and DUNS #’], New RE: [‘Name and DUNS #’], New QSE: [‘Name and DUNS #’]”
 - If there are multiple LRs being changed in the same CR, the user can list the DACs in the text or the user can attach a list of the DACs to the CR
 - Note that an attachment can always be used to provide the details of the change request if the user would like to include a file
 - No data panels need to be changed

- Sample RE change submission

Resource Services

Hello, Donald House Log Out

Start Your Change Request

All fields are required unless marked optional

What Company is this change for today?
MP2 ENERGY LLC (RE)

Requested Production Load
01-08-2025

Contact ERCOT for Interim Updates. Otherwise choose a date at least 90 days in the future.

Who can we contact about this change request?

Contact Name
Donald House

Email
take@email.com

Phone Number
555-867-5309

Change Description
Change the RE for the LAN,LD1 LR on 1/8/2025. Current RE: CURRENT RE NAME, DUNS #1234567893000, Current QSE: CURRENT QSE NAME, DUNS #1234567892000, New RE: NEW RE NAME, DUNS #9876543212000, New QSE: NEW QSE NAME, DUNS #9876543212000

Characters Remaining 23

Click **Let's Get Started** to move to the LR List screen

Let's Get Started

- There is a limitation in the application that requires the user to either make a data entry or to attach a file before being able to submit the CR
 - The easiest solution is to attach a file that includes the same information provided in the Change Description; this can be especially helpful if there are several LRs being transferred that can be listed in a file instead of written into the Change Description
 - Another solution is to re-enter one existing data point that is just informational, such as the City for Point of Delivery on the Load Resource Info panel

Resource Services

Hello, Donald House Log Out

Attachments

Click **Attachments** to add any files; can be helpful if several LRs are being transferred

User	Date

Choose File

Continue

Resource Services

Hello, Donald House Log Out

Attachments

Click **Continue** to move to the LR List screen and finish the submission

File Name	File Type	User	Date
TEST_RE Change Request Details.docx	Other	Donald House	11-08-2024 17:58 PM

Choose File

Continue

- Final screen to complete submission (after clicking **Done** or **Check Progress** and then **Continue**)

Resource Services Hello, Donald House [Log Out](#)

RSCR 7266 **Production Load Date** **Load Resource**
 01-08-2025 Change the RE for the LAN_LD1 LR on 1/8/2025. Current RE: CURRENT RE NAME, DUNS #1234567893000; Current QSE: CURRENT QSE NAME, DUNS #1234567892000, New RE: NEW RE NAME, DUNS #9876543212000, New QSE: NEW QSE NAME, DUNS #9876543212000

[Download Load Resource Data](#) [Submit to ERCOT](#)

My Change Info
[Go Back To Section](#)

Requested Production Load Date	01-08-2025
Contact Name	Donald House
Email	fake@email.com
Phone Number	555-667-5309
Description of your Change Request	Change the RE for the LAN_LD1 LR on 1/8/2025. Current RE: CURRENT RE NAME, DUNS #1234567893000; Current QSE: CURRENT QSE NAME, DUNS #1234567892000, New RE: NEW RE NAME, DUNS #9876543212000, New QSE: NEW QSE NAME, DUNS #9876543212000

Attachments
[Go Back To Section](#)

File Name	File Type	User	Attached On
TEST_RE Change Request Details.docx	Other	Donald House	11-08-2024 17:58 PM

Is there anything else we need to know about this change?

Click **Submit to ERCOT** to finish the submission

[Download Load Resource Data](#) [Submit to ERCOT](#)

- On the PLD, the Demand Integration team will verify that the RE change has taken place and will ask the new RE to verify that they can view the LR data in RIOO – RS and in the ERCOT market systems

Stopping an existing LR

- To stop an existing LR, only the **Stop Date** on the Load Resource Info panel needs to be updated
 - The **Stop Date** needs to be a PLD coordinated with the ERCOT Demand Integration team (ERCOTLRandSODG@ercot.com)
 - **Note that the Stop Date entered must be one day before the PLD to align with the timing of the database load**
 - The rest of the CR process is the same as when updating an LR
 - **NOTE: Once the Stop Date is populated in the CR, the user cannot edit any other information in the data panels**
 - **After the CR is submitted, no other CRs can be created for this LR**
 - If a mistake is noticed before the PLD, the RE can contact ERCOT Demand Integration to request for the CR to be canceled

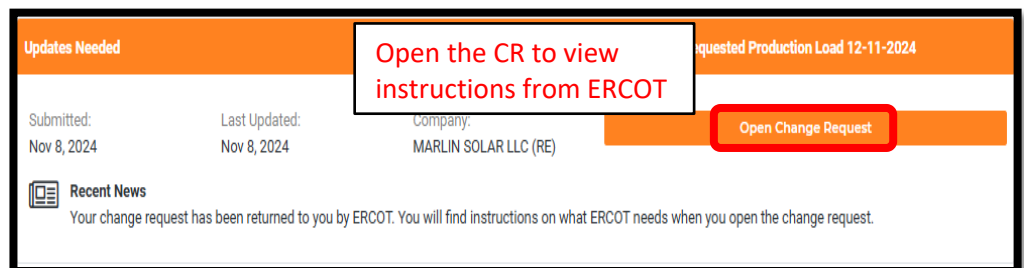
The screenshot displays the 'Resource Services' interface for 'Load Resource Info'. The 'Stop Date' field is highlighted with a red box and contains the date '12-10-2024'. A red callout box with a black border contains the text: 'Use the calendar to select the requested Stop Date (1 day before the PLD); reminder to coordinate the PLD to align with a production model load'. Other fields include 'Prod Load 12-11-2024', 'Common Name for LR', 'Physical Street Address for Point of Delivery', and 'Name of City for Point of Delivery (POD)'. The interface includes navigation buttons like 'Back', 'Save and Continue', and 'Done or Check Progress'.

After submitting Change Request

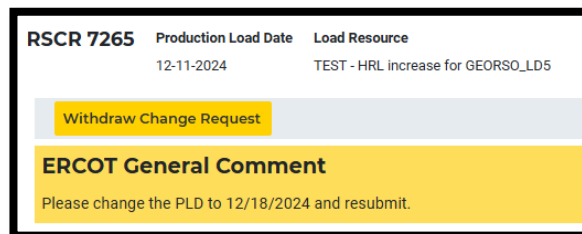
Change Request status

In addition to the Recent News updates on the CR dashboard, the CR submitter will receive automated emails from ERCOT with status updates as the request moves through the modeling process as well as any requests for revisions to the CR.

- Status update text on the CR dashboard for a submitted CR include:
 - **Your change request is waiting for review at ERCOT (Pending Review)**
 - The user can still withdraw the CR when in this status
 - **ERCOT is in the process of reviewing your change request (In Review)**
 - ERCOT changes to this status after completing an initial review of the submission
 - User can't make updates when the CR is in this status
 - **If corrections are required**, ERCOT will return the CR to the submitter
 - The user will see a new message on the CR dashboard stating **Your change request has been returned to you by ERCOT. You will find instructions on what ERCOT needs when you open the change request.**
- Sample of returned CR message



- Instructions are included when the CR is opened



- **Your change request was reviewed at ERCOT and is now ready to be modeled in NMMS (Ready for Modeling)**
 - ERCOT changes to this status after the modeling request has been submitted
 - The modeling request is pending testing and approval
- **Your change request has been modeled in NMMS (Modeled)**
 - ERCOT changes to this status after the modeling request has been fully tested and approved for the requested model load snapshot (usually 2-3 weeks before the PLD)

Confirming updated LR in production Network Model

After the PLD for the CR, the submitter is encouraged to verify that the updates are visible in the View Load Resources data in RIOO-RS. ERCOT will verify that the LR changes are in the production Network Model, but it is the responsibility of the RE/QSE to notify ERCOT if they notice any market dispatch or settlements issues related to the CR.

Creating a new LR

To create a new LR, the RE must use the RIOO Interconnection Services application (RIOO – IS), which is accessed using the same RIOO user account. Refer to the **RIOO User Guide – Creating a New Load Resource** on the [Load Resources webpage](#) for details.



Troubleshooting RIOO issues

User account

If a RIOO user can't access the registration entry screens in RIOO – IS or can't view the existing Resources in RIOO – RS, there are some common reasons for these issues. The list below does not include all possible causes of access problems, but these are the most common issues experienced.

- Users can only make registration changes for REs for which they have a digital certificate with the RIOORS_M_Operator role assigned
 - ERCOT can't create the digital certificates or assign the role. This must be done by the RE's User Security Administrator (USA).
- If the user represents multiple REs, they must be sure to use the correct email address when logging into RIOO. Often, accounts are set up with different email addresses for the same user. If this is the case, the user needs to know which email address to use for each RE.
- A RIOO user can't be registered as both an RE and a TDSP on the same account. If the user needs to access RIOO as both types, then separate RIOO accounts must be created for each, and a different email address must be used for each account.

Problems viewing data or completing submissions

Although the user may be able to access the RIOO application, sometimes the session becomes stale and needs to be refreshed to view data correctly or to complete a submission. This often leads to the user being stuck in a loop of being sent back to the login screen or the main dashboard when navigating through the application.

- If the user experiences such an issue, and after any application outage (planned or unplanned), the user should logout of the application, clear their browser history cache, and then log back into the application.
 - Select “Remember this browser” when logging in
- If the user starts a CR but doesn’t attempt to submit it until sometime later (multiple days or more into the future), the user may not be able to submit the CR due to changes in the application from an update release or other registration data and/or network model changes that happened after the CR was started.
 - Data edits may not be validated, and the data panels won’t turn “green” even if all the required fields have been populated
 - The user may not be able to access the E-sign panel or to complete the payment processing
 - Any of these issues prevent the “submit” button from being activated
 - The logout/login process above is recommended to resolve any of these issues
 - If this doesn’t work, the submission may have to be canceled/withdrawn and a new submission will be needed
- If the payment process has been completed, but the user can’t submit the CR, there may be an issue with the third-party payment vendor. Sometimes, the payment confirmation isn’t sent correctly from the vendor to ERCOT.
 - If this occurs, the RIOO team can verify if the payment was received by the vendor. If payment was received, then the RIOO team will manually update the payment status in the database. This will allow the user to submit the CR.

Reporting issues

Any access problems, functionality issues, or suggestions for improvements to the application can be sent via email to RIOO-Help@ercot.com and ERCOTLRandSODG@ercot.com. Significant updates to the application may be communicated through market notices.