

# **ERCOT** Weatherization & Inspection

# Market Participant Portal User Guide

ERCOT WEATHERIZATION AND INSPECTION TEAM

Revision #	Preparer	Approver	Revision Date	Summary of Changes
0	Brandon Manley	David Kezell	April 30, 2024	Initial user guide published
1	Sheri Messer	David Kezell	October 31, 2024	Clarifying language and minor additions
2	Sheri Messer	David Kezell	November 15, 2024	Minor addition

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# **Overview**

The Public Utility Commission of Texas (PUC/Commission) Extreme Weather Preparedness Rule, 16 Texas Administrative Code (TAC) §25.55, referred to as the Rule, establishes that the ERCOT Weatherization and Inspection (W&I) team actively perform Resource Entity (RE) and Transmission Service Provider (TSP) onsite inspections beginning December of 2021.

Using the ERCOT Weatherization and Inspection Market Participant Portal (portal), Market Participant (MP) representatives submit required summer and winter Declaration of Weather Preparedness (DoWP) documents utilizing built in digital forms and self-service downloads as necessary to meet Rule requirements. These include Appendix A, the Notarized Attestation, and for certain MPs with natural gas-fired resources for the summer inspection season, Attachment K and Supplement to Attachment K.

## **Purpose**

The purpose of the Weatherization and Inspection Market Participant Portal User Guide is to provide MP representatives with instructions for how to navigate the portal interface, communicate with the W&I team, and meet the obligations established in the Rule.

The portal was activated on May 1, 2024, and is the primary method of communication between ERCOT and MP representatives on weatherization related activities. The portal:

- replaces the previously used DocuSign platform for signing and submitting DoWP and related documents,
- communicates Notices of Inspection (NOIs) and requires an MP representative to acknowledge and accept NOIs,
- enables an MP representative to submit questions and communicate with the W&I team, and
- enables an MP representative to submit semi-monthly cure period progress reports, if applicable.

# **Required Permissions and Access (Digital Certificates and Roles)**

The MP User Security Administrator (USA) must add **one** of the following roles to an MP representative's digital certificate.

- SN\_M\_W\_MGR\_ECEII for managers with authority to submit on behalf of the RE/TSP
- SN\_M\_W\_VIEW\_ECEII for employees with **read-only** privileges

SN_M_W_MGR_ECEII	RE and TSP for Weatherization can submit/write ECEII access Manager Role. Can submit in ServiceNow on behalf of their DUNS and update/view items submitted by others at their DUNS.	RE DSP TSP
	KE and TSP for Weatherization can submit/write ECEII access	

Figure 1: Assigned manager role for digital certificate

Figure 2: Assigned read-only role for digital certificate

Please note that an MP representative that does not have a digital certificate must have one assigned by the MP USA prior to adding an MP representative portal role. After the USA issues the digital certificate, it may be downloaded and installed. An MP representative may then access the portal using the ERCOT Market Information System (MIS) login at the following link, <u>https://mis.ercot.com/secure/applications.</u>

With the read-only role, an MP representative may only view current and existing information in the portal and may not perform actions within the portal. <u>DO NOT CONCURRENTLY ASSIGN</u> <u>THE READ-ONLY ROLE WITH THE MANAGER ROLE, as this will prevent a user from</u> <u>performing managerial actions within the portal.</u>

<u>Please ensure AR and BAR spam filters allow email to be received from</u> <u>ercot@servicenowservices.com to assure timely responses to Notices of Inspections (NOI) and</u> <u>other communications from the W&I team through the portal. Additionally, please keep AR and</u> <u>BAR registrations current.</u>

# **Portal Overview and Navigation**

#### Summary

Once an MP representative is logged into the portal, the title, ERCOT Weatherization and Inspection Market Participant Portal, is displayed at the top of the home page. Items on this page include:

- Search Bar allows an MP representative to search Knowledge Base articles within the portal.
- **Knowledge Base** provides knowledge articles related to the inspection process, documentation, frequently asked questions (FAQs), and other weatherization and inspection activities.
- Submissions & Requests interface for submitting DoWP and supporting documentation. In addition, an MP representative may create a weatherization support case (wSUP) to submit requests and questions. The W&I team receives the wSUP and responds directly to an MP representative through the portal.
- My Lists provides access to various items, including DoWP documents, wSUP cases, and NOIs.
- **Portal header** provides access to Knowledge Base, My Lists, Completed Submissions, Work Orders, and Your Profile.
- Announcements and News provides timely and important information to MP representatives.
- Articles provides access to Featured Article Content and Useful Articles.
- Cases –lists wSUP cases that have not been resolved or closed by the W&I team.
- Tasks –displays current and outstanding cure period tasks.



Figure 3: Portal overview

#### **Knowledge Base**

Select the 'Knowledge Base' section on the portal home page to browse and search articles related to the inspection process, documentation, FAQs, and other activities related to weatherization and inspection. Additionally, Knowledge Base articles may be rated for usefulness. Knowledge Base information and articles may also be accessed through sections located in the middle of the homepage labeled Most Useful Articles, Featured Articles, and Most Read Articles.



Figure 4: Knowledge Base section



Figure 5: Knowledge Base section access from portal header

#### **Submissions & Requests**

The 'Submissions & Requests' section is accessible from the homepage. Through the Submissions & Requests section, an MP representative may access the 'Request Catalog' to view all 'Services' available. An MP representative may further refine options within 'Services' by selecting a 'Category.' Once a category is selected, related service options are displayed. Three categories are available:

**3** 

- 1. DoWP TSP/RE Summer
- 2. DoWP TSP/RE Winter
- 3. Support

Select the appropriate category for the intended action. Both DoWP and wSUP requests go directly to the W&I team.

Search	ALC: NOT THE REAL PROPERTY OF		0	
Knowledge Base Bigwee, search, and path articl	stemissions & Re Condact support to make profil of	quests a request, er report submisfism and actuity	to date on	*
Home > Customer Service >	Support			
Categories	Support			
Categories DoWP - TSP - Summer DoWP - TSP - Winter Support	Support Weatherization Supp General Support Case for W	ort leatherization		
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#### Figure 6: Submissions & Requests section

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## **My Lists**

All Cases, My Cases, & My Requests The 'My Lists' page provides personalized information related to an MP:

- All Cases
- Action Needed
- My Cases
- My Case Tasks
- My Requests

All Cases, My Cases, and My Requests display the same information related to a wSUP, DoWP, NOI, and all cases will show up regardless of their current state - new, open, draft, cancelled, or closed.





Figure 7: My Lists section

#### Action Needed

The 'Action Needed' section displays case status - new, open, or awaiting info. Items in this section are not resolved or closed and have outstanding action(s) required by either an MP representative or the ERCOT W&I team.

e 🕻 My Lists						Search		Q	
Lists		eded							
Cases	All > Sta	te in (New, Op	en, Awaiting Info)						
ion Needed	Number	Company	Task type	Contact	Short	description	State	Updated 🗸	
Cases	WSUP00001006		Weather Support	LCRA OPR ROLE USER	Weath	erization Support ticket	New	03-07-2024 06:37:22 PM	
Case Tasks	WSUP00001022		Weather Support	LCRA OPR ROLE USER	Weath	erization Support ticket	Open	03-07-2024 06:37:22 PM	
Requests	WSUP00001009		Weather Support	LCRA OPR ROLE USER	Weath	erization Support ticket	New	03-07-2024 06:37:22 PM	
	WSUP00001026		Weather Support	LCRA MGR ROLE USER	Hey ca	in you see this?	New	03-07-2024 06:37:22 PM	
	WSUP00001017		Weather Support	LCRA OPR ROLE USER	Weath	erization Support ticket	New	03-07-2024 06:37:22 PM	
	WSUP00001010		Weather Support	LCRA OPR ROLE USER	Weath	erization Support ticket	New	03-07-2024 06:37:22 PM	
	WSUP00001005		Weather Support	LCRA MGR ROLE USER	Weath	erization Support ticket	New	03-07-2024 06:37:21 PM	
	WSUP00001008		Weather Support	LCRA OPR ROLE USER	Weath	erization Support ticket	Open	03-07-2024 06:37:21 PM	
	WSUP00001027		Weather Support	LCRA MGR ROLE USER	Weath	erization Support ticket	New	03-07-2024 06:37:21 PM	
	WSUP00001013		Weather Support		Weath	erization Support ticket	New	03-07-2024 06:37:21 PM	
	WSUP00001030		Weather Support	LCRA OPR ROLE USER	Weath	erization Support ticket	New	03-07-2024 06:37:21 PM	

Figure 8: My Lists - Action Needed

#### My Case Tasks

MP cure period tasks appear in the 'My Case Tasks' section as applicable. If an MP does not have a cure period or there are no cure period tasks, information will not display in this section.

				Search	
≡ My Case Task	5				
S All					
Number	Service	State	Assigned to	Subject	
CPTSK0001168		Draft		Testing_Summer Inspection_3-14-2024	
CPTSK0001170		Draft		Testing_Summer Inspection_3-14-2024	
CPTSK0001169		Draft		Testing_Summer Inspection_3-14-2024	
CPT5K0001159		In Progress		Demo Task	
CPT5K0001160		In Progress		Demo Task 2	
	My Case Task     M     All     Number     CrT5x0001168     CrT5x000119     CrT5x000119     CrT5x0001160	Image: Mage Cases Tasks           Image: Cases Tasks           Image: Cases Tasks           Image: Cases Tasks           CPTSK000188           CPTSK000170           CPTSK0001199           CPTSK0001199           CPTSK0001190	Image: May Case Tasks           Image: All           Number         Service         State           CPT5K000108         Draft           CPT5K000170         Draft           CPT5K000119         Draft           CPT5K000119         Draft           CPT5K000119         Draft           CPT5K000119         Draft           CPT5K000119         Draft           CPT5K000119         Draft	Image: Maj Case Tasks           Image: All           Number         Service         State         Assigned to           CPT5K000108         Draft         CPT5K0001070         Draft           CPT5K000109         Draft         CPTSK000109         CPTSK000100           CPT5K0001100         In Progress         CPTSK0001100	

Figure 9: My Lists - My Case Tasks

#### **Completed Submissions**

The 'Completed Submissions' page displays a list of all previous DoWP and supplemental documents submitted through the portal.



Figure 10: Portal header - Completed Submissions

#### **Work Orders**

Inspection reports are available to an MP representative through the 'Work Orders' section on the portal header. Inspection reports may be viewed by selecting the appropriate work order associated with the inspection. In addition, an MP representative may communicate with the W&I team through the 'Activity' section on the work order.

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Figure 11: Portal header - Work Orders

# Instructions

## Request Portal Role Access from User Security Administrator (USA)

An MP representative must request access to the portal from the internal MP USA. The USA will add the appropriate role, SN\_M\_W\_MGR\_ECEII, to the MP digital certificate. If the MP USA is unfamiliar with the process, please refer to the Market Participant Identity Management (MPIM) Digital Certificate User Guide accessible on the ERCOT.com website. Navigate to the user guide with the following pathway:

- 1. Navigate to ERCOT.com website.
- 2. Select the 'Services' tab > Market Data Transparency > Digital Certificate Security Information.
- 3. Navigate to 'Certificate Documentation' and select 'ERCOT Digital Certificate User Guide.'

Certificate Documentation	
ERCOT API Security Changes PowerPoint slides from WebEx Presentation presented on 05/14/2019	May 15, 2019 - pptx - 167.3 KB
ERCOT Digital Certificate Download Process	Mar 22, 2024 - docx - 315.6 KB
ERCOT SSL Communication Standards	Oct 5, 2022 - doc - 290.5 KB
ERCOT Digital Certificate User Guide	Apr 14, 2022 - docx - 3.4 MB
ERCOT Digital Certificate Installation Video	

Figure 12: ERCOT Digital Certificate User Guide location

Once the role assignment is complete, an MP representative may log into the portal using the provided link, <u>https://mis.ercot.com/secure/applications</u>.

An MP other than the Authorized Representative (AR) or Backup Authorized Representative (BAR) may be assigned a read-only role on the digital certificate to access the portal. If an MP representative has not previously interacted with ERCOT through any of the current ERCOT systems, the MP representative must work with the USA to receive a digital certificate prior to the role assignment to that digital certificate. Please refer to the ERCOT Digital Certificate User Guide and Required Permissions and Access section of this document for further guidance.



Figure 13: Digital Certificates & Roles steps

## Log into ERCOT Weatherization & Inspection Market Participant Portal

Once the USA has issued the appropriate credentials, the portal may be accessed through the link below. An MP representative may also access the portal by logging into the MP Market Information System (MIS).

Steps:

- 1. Secure appropriate permissions from USA and log into the portal through the ERCOT MIS using the provided link, <u>https://mis.ercot.com/secure/applications.</u>
- 2. Select the appropriate Digital Certificate.
- 3. Navigate to the 'Application Library.'
- 4. Select the 'Weatherization and Inspection' application.
- 5. Log in to the ERCOT Weatherization & Inspection Market Participant Portal.

Sign in to your acco	Select a cer	tificate 2	ourself to itestmis.ercot.co	om:443	×
	Subject		Issuer	Serial	^
	LCRA RO ROI	LE USER	ERCOT Enterprise T	0A925D734A8410E	Luse -
rcot 学   Market Informat	ion System 3 rary			Data Pre	ducts Applications Notices
Application Lib ese are the applications available based on Find ESIID Find Electric Service Identifier ()	ion System 3 rary your Digital Certificate's permission ESI ID) information.	18. Renewable Ene Link to Texas Renew website.	ergy Credits vable Energy Credits (REC)	4 Weatherization ad In Portal	ducts Applications Notices
Application Lib ese are the applications available based on Q Find ESIID Find Electric Service Identifier ()	ion System 3 rary your Digital Certificate's permission ESI ID) information.	ns. Renewable Ene Link to Texas Renew website. Of Weatherization & Inspect	ergy Credits vable Energy Credits (REC)	A Weatherization ad in Portal	ducts Applications Notices

Figure 14: ERCOT Weatherization & Inspection MP Portal login

## **Submitting Declaration of Weather Preparedness Documents**

#### Appendix A

An MP representative must submit Declaration of Weather Preparedness documents, including the Notarized Attestation, Appendix A, Attachment K, Supplement to Attachment K for REs that use natural gas as the primary fuel at any of their resources, and other supplemental documents through the portal. Please note that the portal does not support simultaneous editing or document submission by multiple users. To prevent conflicts and potential loss of data, please coordinate with your team to ensure only one person with the SN\_M\_W\_MGR\_ECEII role accesses the portal at a time. Additionally, responses within the sections, 'Summary of Activities to Complete' and 'Comments,' are limited to 5,000 characters each.

Instructions for submitting Appendix A:

- 1. Navigate to 'Submissions & Requests' from the portal homepage.
- Navigate to the Categories menu on the left to select the appropriate inspection season (e.g., DoWP – RE – Summer).
- 3. Select the season's 'Notarized Attestation.'

Navigate to the Appendix A form. Please note that attempting to complete the 'Notarized Attestation' or 'Attachment K' before submitting Appendix A will result in an error message stating that, "You must first submit the Appendix A form."





- a. Verify the appropriate year is selected (e.g., 2024). This field is auto populated with the year the inspection season begins and should not require an MP representative to manually change.
  - i. Please note that an MP representative who submits a late DoWP with permissible reasons during the winter inspection season will submit under the year the inspection season began. For example, an MP representative who submits a DoWP in January or February of 2025 will select 2024 as the inspection season, as this is the year the current inspection season began.
- b. Review resources/substations to ensure all are present in Appendix A.
- c. Update the list and fields as necessary. Use the 'pencil' icon to edit and the 'X' icon to delete.
  - i. Please note that a large list may be exported to an XLS, CSV, or PDF file for ease of review. Before an Appendix A may be exported, it must be submitted through the portal. After Appendix A is submitted, navigate back to the Attestation page, and print to XLS, CSV, or PDF. Review the exported file and make any necessary corrections. Navigate back to the Appendix A digital form in the portal and make the required updates. **The updated Appendix A form must be resubmitted**.

Ime / CulturerService / Deltrine:Summer / mE-Sommer-AppendixA	oneur	4		
RE – Summer – Appendix A opendix A für Summer Generation Resources DOINP		Submit		
ppendix A for Summer Generation Resource Declaration of Weather Preparedness.				
OTC: When submitting large data sets be prepared for form submission to require a significant amount of time to complete. [U 5 minutes.] Bo not close your browner or randgate away from the page until you see the message saying that submission was created.	Up s			
ch willy cloud scheel any one Declaration of Weather Preparedness per seasos. If you have already scheelited for the season, same do will scheelit additional declarations.				
count				
LOWER COLORIdo RIVER AUTHORITY (RE)				
49000				
America (				
104	-			
	Resource Info	rmation (RE Summer)		
	Resource Info	rmation (RE Summer)		
	Resource Infor Add Actions	rmation (RE Summer) Remove All Generation Resource	Maximum Experienced Ambient Temperature (*F)	If a resource is not covered by this de-
	Resource Infor Add Actions	Remove All Generation Resource WIPOPA_WPP_G1	Maximum Experienced Ambient Temperature (*F) 108	If a resource is not covered by this de
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	Resource Infor Add Actions * X * X	Remove All Generation Resource WIPOPA_WPP_G1 BUCHAN_BUCHANG2 FERGCC_FERGGT2	Maximum Experienced Ambient Temperature (*F) 108 109 109	If a resource is not covered by this de
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	Resource info Add Actions * x * x * x * x * x	Remove All Generation Resource WIPOPA_WPP_G1 BUCHAN_BUCHANG2 FERGCC_FERGGT2 MARSF0_MARSF0G1 INKSDA_INKS_G1	Maximum Experienced Ambient Temperature (*F) 108 109 109 105 109	If a resource is not covered by this de

Figure 16: Appendix A edits

- 4. Submit Appendix A
  - a. Please note that successful submission of Appendix A will result in a green banner at the top of the page that states, "Your request has been successfully submitted."

Π	Your request has been successfully submitted	1
h		2

Figure 17: Appendix A submission successful

Attachment K and Supplement to Attachment K (if applicable)

Once Appendix A is successfully submitted, proceed to fill out the Attachment K and Supplement to Attachment K forms, if applicable. TSPs will skip this section and navigate directly to 'Complete Notarized Attestation.'

Instructions for submitting Attachment K and Supplement to Attachment K:

- 1. Navigate to 'Submissions & Requests' on the homepage.
- Navigate to the 'Categories' menu on the left to select the appropriate inspection season (e.g., DoWP – RE – Summer).
- 3. Select Attachment K.

DoWP - RE - Summer DoWP - RE - Summer		7
<u>RE - Summer - Appendix A</u> Appendix A for Summer Generation Resource DoWP	<u>RE - Summer - Attachment K</u> This form must be filled out by any generation resource relying on natural gas as the primary fuel source.	RE - Summer - Notarized Attes Submit to finalize the Declaration of Weather Preparedness
View Details	View Details	View Details

Figure 18: Attachment K form access

4. In the field labeled, 'List Generation Resource(s),' select the resources that use natural gas as the primary fuel source.

ist Generation Resource(s)	
7RNCHSLR_UNIT1	*
7RNCHSLR_UNIT2	
7RNCHSLR_UNIT3	
AEEC_ANTLP_1	
AEEC_ANTLP_2	
AEEC_ANTLP_3	
AEEC_ELK_1	

Figure 19: Attachment K - List Generation Resource(s)

- 5. On the 'Supplement to Attachment K' form, an MP representative may:
  - a. Edit preexisting data to ensure it is correct using the 'pencil' icon under the 'Actions' heading.
  - b. Add new resources and pipeline information using the 'Add' button at the top of the form.
  - c. Remove pre-existing items using the 'X' icon under the 'Actions' heading.

Add	Remove A	1		
Actions	Site Code	Does any resource use Natural Gas as Fuel	Generation Resource Primary Contact	Generation Res
ø ×	FERGCC	Yes	Reagan Springs	512-730-6904/
ø ×	GIDEON	Yes	Reagan Springs	512-730-6904/
ø ×	WIPOPA	Yes	Reagan Springs	512-730-6904/

Figure 20: Supplement to Attachment K

- 6. Complete sections 3 and 4 on the Attachment K form. The fields and items are the same as those on the "paper/Excel" version of the form.
- 7. Submit Supplement to Attachment K.
  - a. Please note that successful submission of Supplement to Attachment K will result in a green banner at the top of the page that states,

"Your Attachment K has been stored with your previously stored Appendix A. Your next step is to prepare a Notarized Attestation document. When you submit the completed Declaration of Weather Preparedness, your most recently stored Appendix A, Attachment K, and Supplement to Attachment K (if applicable), will automatically be combined with your Notarized Attestation document to form the complete Declaration of Summer Weather Preparedness. **Final Declaration Submission**"

The hyperlink, 'Final Declaration Submission,' included in this message, links to the next step for submitting the Notarized Attestation.



Figure 21: Attachment K submission complete

#### **Complete Notarized Attestation**

Once the Appendix A, Attachment K, and Supplement to Attachment K forms have been successfully submitted, the final document to submit is the Notarized Attestation. Notarized Attestations must be submitted to the W&I team through the portal by May 1 for the summer inspection season and December 1 for the winter inspection season. Please note that this timeline may be different for resources in part 3 of the commissioning process.

Instructions for submitting a Notarized Attestation:

- 1. Navigate to 'Submissions & Requests' on the homepage.
- Navigate to the 'Categories' menu on the left to select the appropriate inspection season (e.g. DoWP – RE – Summer).
- 3. Select Notarized Attestation.
  - *a.* Please note that the Notarized Attestation must be submitted AFTER Appendix A and Attachment K/Supplement to Attachment K documents are submitted.

RE - Summer - Appendix A Appendix A for Summer Generation Resource DoWP	<u>RE - Summer - Attachment K</u> This form must be filled out by any generation resource relying on natural gas as the primary fuel source.	<u>RE - Summer - Notarized Attes</u> Submit to finalize the Declaration of Weather Preparedness
View Details	View Details	View Details

Figure 22: Notarized Attestation submission

- 4. Reminder: To perform a more exhaustive review of Appendix A and/or Attachment K, the documents may be downloaded by selecting one or all the hyperlinks.
- 5. Download and print the Notarized Attestation, Appendix A, and other supplemental documents to provide a complete package for review by the "highest-ranking representative, official, or officer with binding authority..."
  - a. For instructions on how to download these documents, please see the next section, "Document Export & Review."



Figure 23: Notarized Attestation - download documents

- 6. Obtain signature and notarization on the Attestation form.
- 7. Scan the signed and notarized Attestation form.
- 8. Upload the completed Notarized Attestation form to the portal.

Indicates required	
DoWP	
	Ψ
Account	
	Ψ.
Season	
None	Ψ
Year	
None	Ψ
Notarized Document	
€ Upload	

Figure 24: Notarized Attestation - upload document

9. Additionally, supplemental documents that provide support for the DoWP may be attached. Attached files may not exceed 25MB each or 100MB in total.

Add attachments

Figure 25: Notarized Attestation - upload supplemental documents

- 10. Submit the Notarized Attestation and supplemental documents.
  - *a.* Upon submission of the Notarized Attestation, confirmation to finalize the DoWP is required. No modifications or updates may be made after confirming final submission.



Figure 26: Final declaration confirmation warning

b. Confirming submission of the final DoWP results in a green banner at the top of the page that states, "*Thank you for submitting your Declaration of Weather Preparedness. You have completed the process. You can view your submission from "My Lists."* 

Thank you for submitting your Declaration of Weather Preparedness. You have completed the process. You can view your submission from "My Lists".

Figure 27: Declaration of Weather Preparedness (DoWP) submission complete

c. In the event a submission is made in error, or an update is necessary, an MP representative must create a wSUP through the portal detailing the situation. If it is determined that a re-submission is appropriate, the W&I team will re-open the summer declaration catalog item to allow an additional submission.

#### Document Export & Review

. Download this document Summer	er-Resource-Declaration	n.pdf		Step	A Generation Resour	D Location Maxim	um Ambient Temperature ("Filf a
rrint out your previously submitte	ed Appendix A			4	BUCHAN_BUCHAN	BUCHAN	109
Appendix A Resource Line	e Data				AUSTPL AUSTING	AUSTPL	110
Supplement to Attachment	nt K Data			T	WIRTZ WIRTZ G1 MARSEO MARSEO	WIRTZ	108
3. Obtain notarized signatures.					G1 WIPOPA WPP G2	WIPOPA	108
4. Upload the notarized document as	ind submit this form.				FERGCC_FERGST1	FERGCC MARBEA	109
					2 GIDEON GIDEONG	CIDEON	108
Prior to submitting this item, you mu	ust complete the Appen	ndix A form.	RE - Summer - Appendix A		FPPYD2_FPP_G3 MARSEO_MARSEO	FPPYD2 MARSEO	108
If you have resources with a primary	y fuel-type of natural ga	is, then you	must also Attachment K. Attachment K		0	interest of	
	≡ RESummer App	endix A GE	Lines	·			
Q	E RE Summer Appendix A	endix A GE A Declaration	Lines of Weather Preparedness State = Draft > AppendicA Declaration of Weather Prepar	dhess is not empty		DF C	
Q	E RE Summer Appendix A	endix A GE A Declaration Location	Lines of Weather Preparedness State = Draft > AppendicA Declaration of Weather Prepar Maximum Ambient Temperature ("Y) If a resource is not covered by this deck	dness is not empty ration Activities to c	Ē	RE Sumr	ner Appendia
	E RE Summer Appendix A Ceneration Resource BUCHAN_BUCHANG2	endix A GE A Declaration Location BUCHAN	Lines of Weather Preparedness State = Draft > AppendicA Declaration of Weather Prepare Maximum Ambient Temperature ('Y) If a resource is not covered by this deck 100	dness is not empty ration Activities to c	E	RE Sumr	ner Appendix
	E RC Summer Appr All > Appendix A Ceneration Resource BUCHAN_BUCHANG2 AUSTPL_AUSTING1	endix A GE A Declaration Location BUCHAN AUSTPL	Lines of Weather Preparedness State = Draft > Appendic A Declaration of Weather Prepar Maximum Ambient Temperature ("7)   If a resource is not covered by this decl 100	dness is not empty ration Activities to c		RE Sumr Export as F	ner Appendix
	E RESummer App AII>Appendix / Ceneration Resource BUCHAN, BUCHANQ2 AUSTING1 WIPOPA, WPP, G3	endix A GE A Declaration Location BUCHAN AUSTPL WIPOPA	Lines of Weather Preparedness State = Draft > AppendicA Declaration of Weather Prepare Maximum Ambient Temperature ("T) If a resource is not covered by this decla 100 100 100	dness is not empty ration Activities to c		<b>RE Sum</b> Export as F Export as E	ner Appendi) PDF xxcel cl
	E RESummer Appr AI>Appendix/ Ceneration Resource BUCHAN, BUCHANG2 AUSTPL,AUSTMAC2 WIPOPA_WPP_03 WIRTZ_VINRTZ_01	endix A GE A Declaration Location BUCHAN AUSTPL WIPOPA WIRTZ	Lines of Weather Preparedness State = Oral: > Appendix A Declaration of Weather Prepare Maximum Ambient Temperature (*) If a resource is not covered by this decl 100 101 102 103 103 104	dness is not empty ration Activities to c		<b>RE Sum</b> Export as F Export as E Export as 0	<b>ner Appendi</b> p PDF ixcel icl
	RE         Summer Appr           Y         All > Appendix /           Ceneration Resource         BUCHAN, BUCHANG2           AUSTPL_AUSTING1         AUSTPL_AUSTING1           WIRTZ_WIRTZ_011         MARSIO_MARSIOG1	endix A GE A Declaration BUCHAN AUSTPL WIPOPA WIRTZ MARSFO	Lines of Weather Preparedness State = Druk > Appendix A Declaration of Weather Prepare Maximum Ambient Temperature (*) If a resource is not covered by this decl 109 110 120 120 120 120 120 120 120 120 120	dness is not empty ration Activities to c		<b>RE Sum</b> Export as F Export as E Export as C	ner Appendio PDF ixcel (cl ISV (ca
	RESUMMER Appl     All > Appendix /     Centration Resource     BUCHAN, BUCHANG2     AUSTRIG.     WIPOPA_WPP_G3     WIPOPA_WPP_G3     WIPOPA_WPP_G2	endix A GE A Declaration BUCHAN AUSTPL WIPOPA WIRTZ MARSFO WIPOPA	Lines of Weather Preparedness State = Druh > Appendix A Declaration of Weather Prepare Naximum Ambient Temperature (*) If a resource is not covered by this decl 109 110 120 120 120 120 120 120 120 120 120	dness is not empty ration Activities to c		<b>RE Sum</b> Export as F Export as C Export as C	ner Appendio PDF Xacel ca

Figure 28: Document export & review process

#### **Correspondence with Weatherization and Inspection Team**

#### Create a Weatherization Support Case (wSUP)

Communication between an MP representative and the W&I team takes place through the portal. Weatherization and inspection related questions and concerns must be submitted through portal by creating a wSUP case. Most wSUP cases are addressed within 2-3 business days.

Instructions for creating a wSUP:

- 1. Navigate to 'Submissions & Requests' on the homepage.
- 2. Select Weatherization Support under the 'Support' heading.
  - *a.* Complete the wSUP form. The fields with a red asterisk are required to be completed prior to submitting the form and is the minimum information needed for the W&I team to respond to the request. As a best practice, please be as specific and thorough as possible and include attachments when applicable.

t Portal		Weatherization Support General Support Case for Weatherization	
	nt	Indicates required Contact	
Submissions & Requ	lests My Lists	LCRA MGR ROLE USER	
Contact support to make a	enuest, or report Access my lists to stay up to date on submissions and activity	Account	
a providini		LOWER COLORADO RIVER AUTHORITY (RE)	×
100 C. C. C.	and the second	Which of the following is your issue related to?	
		None	*
ne > Customer Service >	Support	Please explain the issue you are experiencing	
tegories	Support		Add attachment
	Weatherization Support		
WP - RE - Summer	Weddienzacion Support		
WP - RE - Summer WP - RE - Winter	General Support Case for Weatherization		
WP - RE - Summer WP - RE - Winter pport	General Support Case for Weatherization		

Figure 29: Weatherization Support (wSUP) case navigation

## Notice of Inspection (NOI)

#### Acknowledge and Accept

Once a DoWP is submitted, by June 1 and December 1, the W&I team reviews the submission and begins scheduling inspections for the upcoming season. An NOI may be sent to MPs that have not submitted a DoWP.

Instructions for acknowledging and accepting an NOI:

- The Authorized Representative (AR) and Backup Authorized Representative (BAR) on file receive notification through email from <u>ercot@servicenowservices.com</u> to log into the portal to acknowledge and accept the NOI. To <u>ensure timely responses to NOIs and other</u> <u>communications from the W&I team through the portal, please confirm that AR and BAR email</u> <u>spam filters allow email from ercot@servicenowservices.com</u>.
  - *a.* Please note that the AR/BAR are responsible for forwarding the NOI email notification to any other MP representative responsible for completing the NOI acknowledgment form. To access the NOI acknowledgement link, an MP must have the appropriate digital credential and role assignment. Work with the MP USA to receive the required credentials.

ercot 😓		
To the Authorized Representative of Company Name:		
In accordance with the Public Utility Commission of Texas (PUCT) rule regarding Weather Emergency Preparedness, 18 Texas Administrative Code (TAC) § 35.55, ERCOT nothes you it will perform an inspection of the following Generation Resources beginning at 15-Mar-2020 (BIO).		
This inspection will assess compliance with 16 TAC § 25.55. Your inspector(s) will be:		
Audie Proctor		
Please note, as provided in 16 TaC § 25.55(s)(1)(A), PUCT personnel may accompany ERCOTs impectors during the inspection. Please continue receipt of this notes and provide the following information within 24 hours of receiving this notes by acknowledging providence of inspections could get accurate the context of the	Hame > Acknowledge Notice of Inspection	Search
Acknowledge your plant staff has been advised to expect the ERCOT inspectors at the time and date indicated above:     The name of an individual to mate the ERCOT inspectors and the 2-how plane number at which the ERCOT inspectors may     The physical dates of the Resource intelling and diring directmons and     Any serioral safets, perioral protective equipment (PPE), security, or other requirements for the inspectors to access the     she and conduct the inspectors.	<ul> <li>Indicates required</li> <li>This Notice of Inspection has already been acknowledged or your inspection has already been completed. Thank you, ERCOT Wardhoffadion Team, Return to Pertal</li> <li>Wardhoffadion Team, Smither</li> </ul>	
If you need to contact the inspectors for any reason, please ???	W00012385	
ERCOT requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for	*Account	_
he meeting at the site.	LOWER COLORADO RIVER AUTHORITY (RE)     ×	
f you have any questions that are not inspection related, please contact your ERCOT Account Manager via email.	Contact	
Thanks,	0 Wedesthares	1.1
	Inspection Location	_
	FERGCC	
	Inspection Date	
	15-Mar-2024 at 08:00	
	Inspector	
	Audie Proctor	
	Accept Inspection Date	
	-None	-

Figure 30: Notice of Inspection (NOI) - email and acknowledgement form

- Log in to the portal to acknowledge the NOI or click the link in the email to directly access the NOI acknowledgement form.
  - *a.* In the case there is a technical issue in accessing the acknowledgement form through the NOI email link, consider the following steps:
    - i. Confirm that the correct credentials are assigned. To acknowledge and accept an NOI, the manager role must be assigned SN\_M\_W\_MGR\_ECEII.
    - ii. Log in to the ERCOT Market Information System (MIS) at <u>https://mis.ercot.com/secure/applications</u>, and navigate to the portal. Open a new browser window and copy the NOI acknowledgement link from the NOI email into the browser.
- 3. Select 'Accept' from the drop-down list under the field, 'Accept Inspection Date' to accept and confirm the inspection date.
- 4. Once the inspection date is accepted, complete the additional fields to provide details necessary for the upcoming inspection. Required fields are indicated by a red asterisk.

Accept Inspectio	1 Date
Accept	
The name of an	ndividual to meet the ERCOT inspectors
The email at wh	h the ERCOT inspectors may reach the designated contact person
The 24-hour ph	ne number at which the ERCOT inspectors may reach the designated contact person
Physical address	of facility to be inspected
upplemental driv	ing directions to facility to be inspected
Any personal sat	ty, personal protective equipment (PPE), security, or other requirements for the inspectors to access the site and tion

Figure 31: Notice of Inspection form questions

#### **Request Alternative Inspection Date**

Another option within the 'Accept Inspection Date' drop-down list is "Request an Alternative Inspection Date." A request for an alternate inspection date will only be accepted for unique circumstances and will be determined by the W&I leadership team on a case-by-case basis. An MP that is assigned an inspection but who has not completed all the appropriate commissioning process steps must select this option and provide details for the circumstance.

#### **Inspection Report Availability**

#### **Communication Regarding Inspection**

To correspond with an inspector before an inspection report is received, an MP representative may access open work orders within the 'Work Orders' section on the header of the portal homepage. Navigate to 'Work In Progress' to submit your question or submit a message via the 'Activity' section. A member of the W&I team will receive the message and respond within 2-3 business days.

		Knowledge Base My	Lists Completed Submissions Work (	Orders CCRA MG
ERCOT Weatheriza Market Participant	tion & Inspection Portal			
Search Cnowledge Base rowse, search, and rate articles.	Submissions & Requests Contact support to make a request, or report a problem.	My Lists Access my lists to stay up to dat submissions and activity.	e on	
Cases	Most Useful Articles	News		
WSUP00001005 New • Weatherization Support ticket • • LCRA MGR ROLE USER	No content to display	This should be visible to MPs		
WSUP00001006 New • Weatherization Support ticket • • ROLE USER	Featured Articles	Test News Article 25d ago		
WSUP00001008 Open • Weatherization Support ticket •• ROLE USER	Prepare for Hurricane Bert KB0012225 + 66 Views + 10d ago + ★★★☆☆	This is the news		

Figure 32: Access work orders, works in progress, and inspection report via Work Order section on portal header

≡ Work Orde	rs				Keyword Sea	arch Q
All > State in (Work In Progress, Closed Complete, Closed Incomplete)						
Number 🔺	Company	Location	Parent	Short description	Scheduled start	State
WO0010216		INKSDA	WZ West	Inspection Summer 2023_INKSDA		Work In Progress

Figure 33: Communication on Work Order

00010216	ation Cummor 2022 INV/CDA	Work in Progre
inspec	ction Summer 2023_INKSDA	
Priority 4 - Low	Location INKSDA	
Activity	Attachments Work Order Tasks	
[	type your message here	v Post
R	LCRA MGR ROLE USER	© 9h ago • Additional comments

Figure 34: Communication on Work Order Activity section

In addition, an inspector may send a message to an MP representative through the portal with instructions, questions, and/or documentation that may be requested during the inspection. This communication ensures an MP representative has time to collect the appropriate documentation prior to the inspection and ensure a more seamless inspection process.

#### Work Order Completion – Inspection Report Availability

Once the inspection has been completed, the weatherization inspector summarizes the findings of the inspection in a final inspection report. The final inspection report is reviewed by other ERCOT personnel and then made available in the portal under the 'Work Orders' section in the header of the portal homepage.

If there are follow-up questions or concerns, an MP representative may create a wSUP. A W&I team member will respond within 2-3 business days.

Testing	g_Summer 2024_BM	
Priority 4 - Low	Location FERGCC	
Activity	Attachments Work Order Tasks System RPT:00023413.0000432266853000.2024 RE FERCCC IR.odf	© a day ago
	23.9 KB Brandon Manley	🕑 a day ago

Figure 35: Inspection report location

#### **Cure Periods**

If Rule compliance deficiencies are found that cannot be resolved within 3 business days, a cure period will be determined by ERCOT and assigned to the MP. Identified deficiencies that need to be "cured" are included on the issued inspection report. The inspection report identifies the cure period item(s), item number(s), and a deadline for the deficiency to be corrected.

An MP representative is required to report semi-monthly status updates on each assigned cure period. Updates are provided by the MP representative to the W&I team through the portal.

<b>Ercot</b> Your Power. Our Promise.	Trans Trans Trayor Trayor F: ST2:	Vest Lake Dr. Texas 76574 248-3000 225-7079	AUSTIN 8000 Metropo Bidg. E, Suite I Austin, Texas T: 512-225-7000 F: 512-225-7079
	**PROTECTED INFORMATION**		
	ERCOT Summer 2024 Weatherization Inspection Report		
Authorized Represent	tative,	14 N	far 2024
			with 16
On 03-14-2024, ERC Texas Administrative Subsection § 25.55(d) resource complied wi that subsection, it mu	OT representatives inspected the following generation resources Code (TAC) § 25.55(c)(2). (2) of the rule requires ERCOT to provide an inspection report th § 25.55(c)(2). If ERCOT considers the Generation Entity (GI st provide a reasonable time to cure any deficiency.	addressing whet ) not in complia	ther the ance with
On 03-14-2024, ERC Texas Administrative Subsection § 25.55(d resource complied wi that subsection, it mu At the end of the thirr item(s) not in complia	OT representatives inspected the following generation resources Code (TAC) § 25.55(c)(2). (2) of the rule requires ERCOT to provide an inspection report th § 25.55(c)(2). If ERCOT considers the Generation Entity (GI st provide a reasonable time to cure any deficiency. It business day following the day of your inspection, ERCOT con ance with § 25.55(c)(2):	s for compliance addressing whet 2) not in complia nsidered the foll	ther the ance with owing
On 03-14-2024, ERC Texas Administrative Subsection § 25.55(d) resource complied wi that subsection, it mu At the end of the thirr item(s) not in complia	OT representatives inspected the following generation resources Code (TAC) § 25.55(c)(2). (2) of the rule requires ERCOT to provide an inspection report th § 25.55(c)(2). If ERCOT considers the Generation Entity (GF st provide a reasonable time to cure any deficiency. Housiness day following the day of your inspection, ERCOT con ance with § 25.55(c)(2): Deficiency Description	addressing whet and the solution of the solution of the solution and the solution of the sol	ther the ance with owing Period dline
On 03-14-2024, ERC Texas Administrative Subsection § 25.55(d resource complied wi that subsection, it mu At the end of the thirr item(s) not in complia Item No. CPTSK0001168	OT representatives inspected the following generation resources Code (TAC) § 25.55(c)(2). (2) of the rule requires ERCOT to provide an inspection report th § 25.55(c)(2). If ERCOT considers the Generation Entity (GE st provide a reasonable time to cure any deficiency. It business day following the day of your inspection, ERCOT con unce with § 25.55(c)(2): Deficiency Description Testing_Summer Inspection_3-14-2024 Cure Period Assigne for no trained personnel as of June 1st.	s for compliance addressing whet :) not in complia nsidered the foll Cure Dea ed 2024-0	ther the ance with owing Period dline

Figure 36: Cure period inspection report

Cure period tasks are viewable on the portal homepage under the 'Tasks' sections and in 'My Lists' located on the portal header.

Cases	Most Useful Articles	News
NOI00001072 New • Request Alternate Inspection Date for MCDLD on 17-Mar- 2024 at 12:46 - MCDLD •	No content to display	This should be visible to MPs 2mo ago
NO100001146 Open - Accepted Inspection Date for ABBOTT on 11-Apr-2024 at 19:26 - ABBOTT • ONCOR MGR ROLE USER	Featured Articles  Prepare for Hurricane Bert  KB0012225 - 7 Views - about a month ego -  ★★★★☆☆	Test News Article 2mo ago This is the news 2mo ago
NO100001148 Open • Accepted Inspection Date for on 28-Apr-2024 at 04:00 • • Chris Rowley	Most Read Articles	Prepare for Hurricane Bert for ago
WSUP00001004 New • Weatherization Support ticket • • ONCOR OPR ROLE USER	Prepare for Hurricane Bert KB0012225 - 7 Views - about a month ago - ★★★☆☆	<b>t</b> <sup>4</sup> Announcements
WSUP00001021 New + Weatherization Support ticket + + ONCOR OPR ROLE USER First 5 of 13 View all	Emergency Procedures KR0012262 + 6 Views + about a month ago + में में में में में से	No information available
Tasks	Beclarations of Weather Preparedness KB0012242 + 2 Views + aboute month ago + 文 オオオス	
CPTSK0001162 QA Test Automation + In Progress + CPTSK0001163	GE - Submit Declaration of Preparedness KB0012245 - 1. View + about a month ago - stratestrateste	
QA Test Automation • In Progress •	This should be visible to MPs KB0012235 + 1 View + 2ma ago + ★★☆☆☆	

Figure 37: Cure Period Tasks - homepage

Navigating to cure period tasks through 'My Lists' and then 'My Case Tasks,' provides additional cure period details and allows an MP representative to provide semi-monthly updates.

Home > My Lists			Search		Q	]
My Lists	≡ My Case Tasks					1
All Cases	🔽 All					
Action Needed	there have	for high start	Contrat		Chat.	
My Cases	Number	Subject	Contact	Account	State	
My Case Tasks	CPTSK0001080	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	
Hy Case Tasks	CPTSK0001079	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	
My Requests	CPTSK0001078	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	
	CPTSK0001077	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	
			Dava Marsh		In Departure	

Figure 38: Accessing Cure Period Tasks from My Tasks

An MP representative must provide semi-monthly updates through the 'Activity' section for the cure period task (CPTSK). The W&I team reviews the updates and communicates with an MP representative through the portal as appropriate. An MP representative may submit attachments as part of the cure period tasks and updates. Once the semi-monthly update for each cure period task in the portal is provided, the current update is complete.

Please note that an MP representative must provide updates to their cure period tasks no later than the 15th and the last day of the month until their compliance deficiency has been remedied and the cure period has been successfully closed.

CPT5x000128	Draft Draft
QA Test Automation	
Company Owned Description OOLDEN SPREAD ELEC Davy March Touce Intende to be react	
Activity Attachments United request	
This is my update for the current period on the cure period task. We are on track for cloung streps taken,	1994 and attached is a document suffreq the 🛛 🕅
Dave March 1818, EE summer Both Remänder 3 days before discx 14 All	
Brandon Manley CYEMPORELES Created	use 3 materiae
	QA Test Automation
Task detalls	Norman TALEO (PROCEDUC
Number State CP15k000128 Draft	Adday Machandi Linkel-report
Company Contact COUDEN SPEED SLECTER COOPERATIVE INC. (NC) Dawn Mar	tapper map ten.
	Over Hands     Over Applied to be used pandot to us precipite to an erable for despite and about it a museum attempt to applied

Figure 39: Cure Period communication on bi-monthly updates

# Appendix

#### **Glossary of Acronyms**

- AR Authorized Representative
- BAR Backup Authorized Representative
- CPTSK Cure Period Task
- DoWP Declaration of Weather Preparedness
- MIS Market Information System
- MP Market Participant
- NOI Notice of Inspection
- RE Resource Entity
- TSP Transmission Service Provider
- USA User Security Administration
- W&I Weatherization and Inspection
- wSUP Weatherization Support Case

#### **Contact Information**

ERCOT Account Manager or ERCOT Client	Phone: (512) 248-3900
Services	Email: <u>clientservices@ercot.com</u>

#### **More Information**

Digital Certificate User Guide – Market Participant Identity Management (MPIM) This document provides Market Participant (MP) USER Security Administrators (USA) with information regarding the process of receiving their Digital Certificates and serves as a reference tool to navigate through the Market Participant Identity Management (MPIM) features.

This USER Guide provides a general overview of the process for obtaining and handling Digital Certificates. If any conflict exists between this USER Guide and the ERCOT Protocols, then the ERCOT Protocols shall prevail. Please refer to the ERCOT Protocols "USER Security Administrator and Digital Certificates", Section 16, regarding complete details of USA responsibilities.

#### MPIM\_Digital\_Certificate\_User\_Guide

https://www.ercot.com/services/mdt/webservices

#### Summer Weather Readiness

This page provides information on Summer Weather Readiness efforts. ERCOT will periodically add pertinent material.

https://www.ercot.com/gridinfo/generation/summerready

Winter Weather Readiness

This page provides information on Winter Weather Readiness efforts. ERCOT will periodically add pertinent material.

https://www.ercot.com/gridinfo/generation/winterready