

Managing INRs as a TSP/DSP in RIOO Interconnection Services

Version 12.31.21

ERCOT RIOO Interconnection Services Release Notes

December, 2021

ERCOT has released the latest version of Resource Integration and Ongoing Operations - Interconnection Services (RIOO - IS).

The RIOO - IS online app enables an Interconnecting Entity (IE) or Resource Entity (RE) to create and manage requests that propose new generation resources to interconnect to the Texas power grid at new or existing sites. Transmission/Distribution Service Providers (TSPs) can view the Interconnection Requests (INRs) as well as review documents in support of the INRs and record/update project milestone dates as they occur.

For TSPs, ERCOT starts their RIOO – IS TSP user account using their email address from their Market Participant Identity Management (MPIM) profile as their RIOO - IS user name. Each TSP must request that their USA add the GINR_M_Operator role to the MPIM profile and then respond to the email to set their account password and enroll their smart phone in a multifactor authentication (MFA) app that validates login requests.

The <u>ERCOT RIOO Interconnection Services TSP Sign-Up Reference</u> that takes the TSP through finishing the account sign up is available from the Resource Integration page of the ERCOT website (ercot.com > Services > Registration and Qualification > Resource Integration).

About this Guide

This guide provides information to assist TSPs with performing tasks in RIOO - IS, such as viewing the INRs submitted by IEs/REs for new generation resource interconnection projects, reviewing drafts of required documents, and adding change requests to start various studies as well as recording specific milestone dates.

Supporting Documentation

RIOO Services documentation available from the *Resource Integration* page of the ercot.com website:

- IE Sign Up Guide for RIOO Services
- RE Sign Up Guide for RIOO Services
- TSP/DSP Sign Up Guide for RIOO Services
- Managing Your RIOO Services User Account

- Creating an INR for a Generation Resource Under 10MW
- Creating an INR for a Generation Resource Over 10MW
- Managing Your INR as an IE/RE
- Managing INRs as a TSP/DSP

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Accessing RIOO - IS

Accessing RIOO – IS involves logging into your TSP account with the login credentials and the multifactor authentication (MFA) method you signed up with (such as Auth0 Guardian or Google Authenticator).

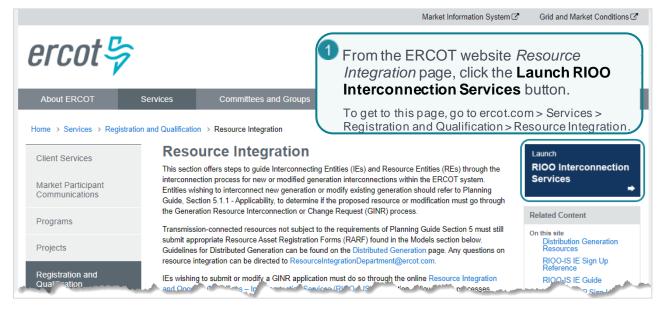
The **GINR_M_Operator** role must be in your MPIM profile. Refer to the *TSP Sign-Up Reference* (on the ercot.com website).

To change the MFA app associated with your account, you must submit a help ticket to the ERCOT help desk to have ERCOT Product Support reset your account and send you an email with instructions. Refer to *Changing to Google Authenticator MFA* on page 56.

Logging into Your Account

After launching the RIOO-IS app from the ERCOT website, log into your TSP user account and verify your login attempt.

Access the RIOO Interconnection Services App



Log Into Your Account

ercot 😽	
Interconnection Services	
Log In Sign Up	
yours@example.com	Type in your email address for the user name.
your password	2 Type in password you set this account.
Don't remember your password?	
	k LOG IN >.

If you cannot log in after 10 tries, the YOUR ACCOUNT HAS BEEN BLOCKED AFTER MULTIPLE CONSECUTIVE LOGIN ATTEMPTS message displays. Open a Help Desk ticket that tells them you are blocked by your MFA and that Operations should unblock your ID.)

Verify Your Login On Your Smart Phone

For Guardian Auth0: Locate the Guardian Auth0 message, swipe right, and tap Allow.

For Google Authenticator: Open Authenticator to view the code, type the 6 numbers of your new code into the ERCOT verification code page, and click the continue arrow.

For SMS Authentication: Open the new message, type the 6 numbers of your new code into the ERCOT verification code page, and click the continue arrow.

Logging Out of Your Account

You should log out of your account when you are finished performing tasks.

Hello My Account 💄 Log Out 🕞 1 On the title ba

On the right side of the **Interconnection Serices** title bar, click **Log Out**.

Understanding the RIOO-IS TSP Dashboard

After you have finished signing up and logged in to RIOO-IS, your *Interconnection Request List* tab displays with the INR List of the appropriate submitted INRs as well as the tab to view the *TSP Key Milestones* information.

While working on a RIOO-IS page, you can click the ercot logo in the upper left to return to the main Interconnection Requests List page.

Working with the INR List

The left side of the INR List displays the resource details provided in the INR by the IE/RE.

Home Interconnection	Interconnectio	n Request List	Attachment List					
INR INR List								
how 10 ~ ent	ries 🗌 Show Opera	ational INR's	Show Cancelled INR's					
Action	TSP	INR Number	Project Name	Application Type	Tech Type ≑	MW \$	POI	Projected COD
View -	TSP1	23INR1120	BIG WIND 3	DGR - SM	wт	9	79th & Lamb	11-21-2023
View -	TSP2	23INR1230	SOLAR2	DGR - SM	PV	7	1130 Hwy 71	12-30-2023
View -	TSP3	22INR0910	SOLAR FARM 2	DGR - SM	PV	8.5	Route 4	09-10-2023
View -	TSP4	23INR0223	EVEREADY	DGR-SM	BS	6	32 Cameron Rd	02-23-2023
View -	TSP5	23INR1220	BIG WOLF	DGR - LG	ST	70	Forest Rd 6	12-20-2023
View -	TSP6	24INR0203	BLUEBONNET	DGR - LG	от	33	RR 6689 and NW Hwy	02-03-2024
View -	TSP7	24INR0523	WIND HAVEN	TGR - SM	FC	9.95	Buffalo Field	05-23-2023
View -	TSP8	23INR1123	SUNNYSIDE	TGR - SM	PV	9	647 Sun Chase	11-23-2023
View -	TSP9	24INR0623	RIVERSIDE	TGR - LG	ST	70	7864 River Rd	06-23-2024
View -	TSP10	24INR1213	ASBP	TGR - LG	от	34	Great Neck Bend	12-23-2024

The right side of the INR List displays the dates for the key milestones in the project.

				Hello) ,		My Accoun	t 🚢 Log (Dut 🕩 :
_									
• 2								Reset	AII
				Search:	Enter term to	o find	Сору	CSV Exc	el
l	Projected Sync	Projected Energization	FIS Study Scope	Stability Study Start	SSR Study Start			Financia Commite	ment
	\$		•	. +	÷	•			+
,									
				Fi	rst Previous	1 2	3 4 5	6 Next	Last

Adjusting the INR Records Displayed

INR List					
Show	10	~	entries		
Showing 1 to 10 of 11 entries					

You can adjust the number of records that display in this list by changing the number of entries to show on each page of the list. Note that the more records you show, the more time it takes to display each page. Choosing **All** will cause a significant slow down.

	ist						
Show	10	~	entries	Show Operational INR's	Show Cancelled INR's		
Showing 1 to 10 of 11 entries							

You can also adjust the number of records displayed by clicking either the **Show Operational** or **Show Canceled INRs** checkbox.

Hello, TSP Electric Texas	My Account 🐣 Log Out 🕩
	Beset AD
Search: Enter term to find	Copy CSV Excel

From the right side of the page, you can search for specific INRs using an INR Number or Project Name, or filter the list for subsets of INRs using the TSP name or the technology type.

Hello, TSP Electric Texas	My Account 🚢 Log Out 🕩
	Beset All
Search: Enter term to find	CSV Excel

To examine and work with the data displayed for the INRs in your list view, you can convert your view to an Excel spreadsheet or dump the contents into a comma separated values (CSV) file that you can view.

Hello, TSP Electric Texas	My Account 🚨 Log Out 🕩
	Breast All
Search: Enter term to find .	Copy

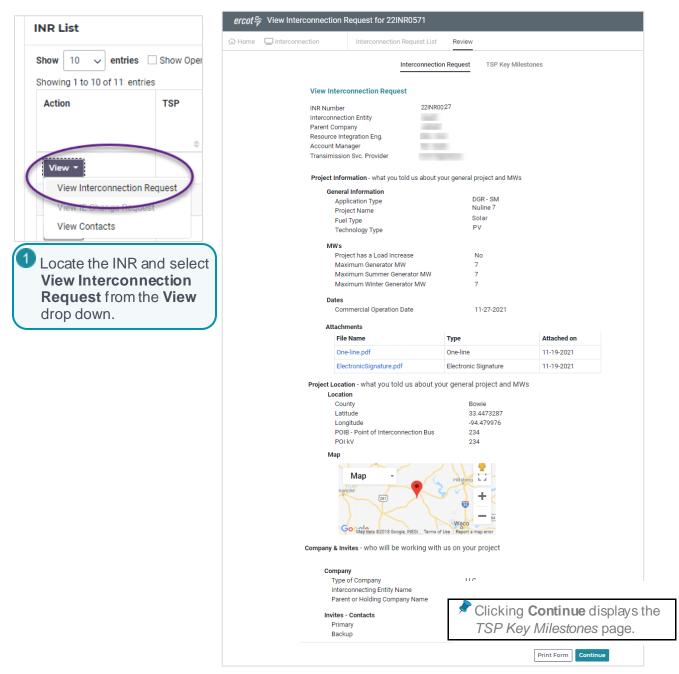
Although you can copy this list, it is not recommended because it may timeout before completing or have unpredicatable results.

Hello, TSP Electric Texas	My Account 🚢 Log Out 🕩
	Reset All
Search: Enter term to find.	Copy CSV Excel

You can click the **Reset All** button to return to the default view of the list.

Viewing an INR

When you view an INR, the details of the project display in a *Review* page along with the tab for viewing the key milestones for the project.



Viewing TSP Milestones

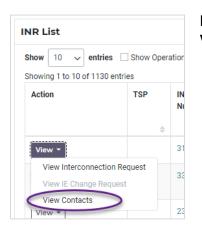
From the top of this INR *Review*, you can click **TSP Key Milestones** to display project dates and when they were achieved (or, from the Interconnection Request List, click **Continue**).

ercot₽	Interconnection	Services		Hello TSP Electric Texas	My Account 💄 🛛 Log Out 🕞
습 Home	Interconnection	Interconnection Request List	Attachment List		
		Interc	onnection Request List R	leview	
		Interconnect	ion Request	estones	
	Viev	w TSP Key Milestones			
		FIS Study Scope Signed and Funde Signed Date Funded Date	d		
		Study Scopes No attachments to display			
		FIS Study Start Dates Stability Study Start SSR Start			
		FIS Studies No attachments to display			
		System Impact Study No attachments to display			
		Interconnection Agreement Dates Original Date Amended Date Interconnection Agreement Docum No attachments to display	ients		
		Other Key Milestones Notice to Proceed Financial Commitment			
	Ba	ack			Print Form

Viewing Project Contacts

REs do not need to invite contacts to work on the project.

IEs invite contacts into the project and the people invited receive an email about the project and can respond to participate. At least one contact must accept the role to back up the primary contact to help with INR decisions. The other contacts can view the INR.



From the **Action** column of the INR List, locate the INR and select the **View Contacts** option from the **View** drop down (to the left).

The contact cards for Backup Contact and other Invited Contacts will display. The date on a contact card shows when they responded to the invitation from the primary contact.

Primary Contact	Backup Contact
Full Name:	Full Name:
)@gmail.com	- 11
P: 7069	P:
Ext:	Ext:
	*Invited: 10-26-2021 not yet joined

Working with INR Attachments

The *Attachments List* displays the files that have been uploaded to support INRs (such as the oneline schematic, study results, or permits) as well as electronic signatures for the General Entity Information agreement and invoice payments.

Note that the **Version** column indicates if the attachment is a draft or in the Final version.

Home Interconr earch Attachments rom Date		iterconnection Re	equest List	Attachment						
					List					
rom Date	Close Search	Interconn	ection Red	quest Atta	chments	•				
		Show 10	\checkmark entries							Copy CSV Excel
o Date		Showing 1 to INR	10 of 225 entrie Review Start		TSP Name	Attachment Type	Attachment Name	Version	Project	Attached On
			10-06-2021	10-19-2021	TSP1	One-line	Configuration.PNG	Final	BIG WIND 3	10-05-2021 17:29:22
hase of Study		22INR0025	10-07-2021	10-20-2021	TSP1	Electronic Signature	PaymentInvoice_1633536099600.pdf	Final	BIG WIND 3	10-06-2021 11:01:39
,		22INR0025	10-07-2021	10-20-2021	TSP1	Electronic Signature	PaymentReceipt_1633536099831.pdf	Final	BIG WIND 3	10-06-2021 11:01:39
ttachment Type		22INR0025	10-07-2021	10-20-2021	TSP1	SS Study	SSS.pdf	Draft	BIG WIND 3	10-06-2021 11:01:39
auconnent type	*	22INR0025	10-08-2021	10-21-2021	TSP1	RARF	rarf.zip	Draft	BIG WIND 3	10-07-2021 09:38:49
		22INR0100	10-08-2021	10-21-2021	TSP6	One-line	Site16.PNG	Final	BLUEBONNET	10-07-2021 09:39:58
R Number		22INR0100	10-08-2021	10-21-2021	TSP6	Electronic Signature	PaymentInvoice_1635963878909.pdf	Final	BLUEBONNET	10-07-2021 09:39:58
		22INR0100	10-08-2021	10-21-2021	TSP6	Electronic Signature	PaymentReceipt_1635963878914.pdf	Final	BLUEBONNET	10-07-2021 09:39:58
roject Name		22INR0100	10-11-2021	10-22-2021	TSP6	Location Map	operation.PNG	Final	BLUEBONNET	10-08-2021 16:29:27
		22INR0100	10-11-2021	10-22-2021	TSP6	Other	MockAttachment.zip	Final	BLUEBONNET	10-08-2021 16:30:11
echnology Type										
	•									
ounty							First Previous	1 2	3 4 5 6	Next Last
-	•									
DSP Name										
	•									
arent or Holding Comp	any									
Name										
Reset	Search									

You can click the linked document to open it to gather history or information.

When you receive an email from an IE/RE, ERCOT or another TSP about reviewing a document, you can access the document in the *Attachments List* tab. If the attachment is not visible in your view of the list, you can search for it by filtering the list in different ways using the **Search Attachments** panel.

Locating Specific Attachments Using the Search Attachments Pane

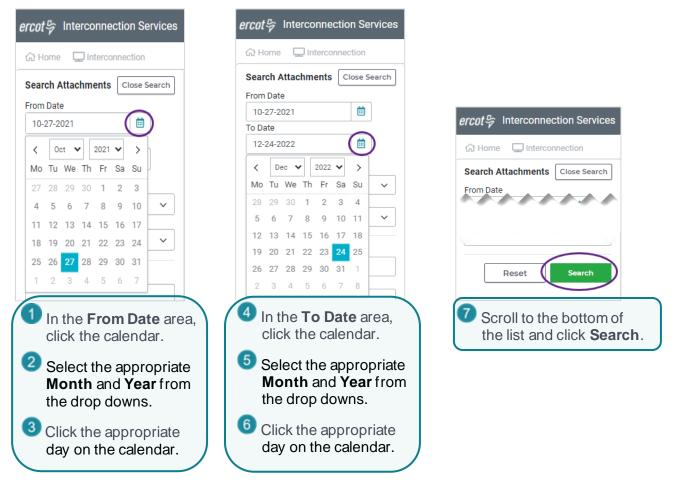
The *Search* pane displays by default, but you can click the **Close Search** button to hide the pane from. You can click the **Open Search** tab to display the *Search* pane again.

<i>ercot</i> 등 Interc	onnection	Services							ei	cot	등 Intercon	nection S	ervices			
分 Home	Int	Interconnection Request List Attachment List				Request List Attachment List					Attachment List					
Interconnection																
Search Attachmen	Close Se	arch	Interconr	nectio	n Requ	uest A	ttachmer	nts	6		Intercon	nection	Request	Attachment	ts	
10-12-2021			Show 10	→ ent	ries				en Sear		Show 10	→ entri	es			
To Date			Showing 1 to	10 of 37	'1 entries				ð		Showing 1 to	o 10 of 371	entries			
11-10-2021	Ē		INR	Review Start	Review End	TDSP Name	Attachment Type	Attachmer	U		INR	Review Start	Review End	TDSP Name	Attachment Type	Attachr
Phase of Study		~	22INR0275	10-12- 2021	10-25- 2021		Electronic Signature	Mitigation			22INR0275	10-12- 2021	10-25- 2021		Electronic Signature	Mitigati

You can search to locate attachments in several ways. You can combine several types of search criteria before scrolling down to click the **Search** button.

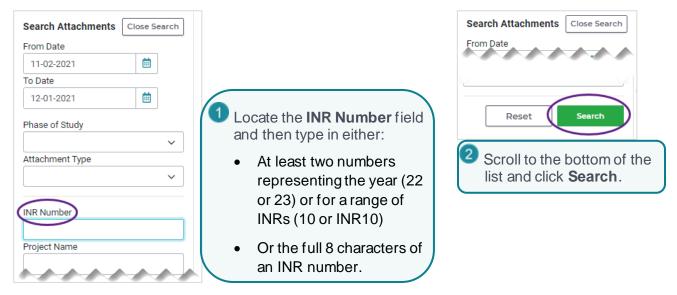
Locating Attachments Uploaded Within a Specific Date Range	Error! Bookmark not defined.
Locating Attachments by INR Number	Error! Bookmark not defined.
Locating Attachments by the Name of the Parent or Holding Company	Error! Bookmark not defined.
Locating Attachments by Project Name	Error! Bookmark not defined.
Locating Attachments by Technology Type	Error! Bookmark not defined.
Locating Attachments by Service Provider Name	Error! Bookmark not defined.
Locating County Map Attachments	Error! Bookmark not defined.
Locating Electronic Signature Attachments	Error! Bookmark not defined.
Locating FIS Attachments	Error! Bookmark not defined.
Locating Generation Entity Information Attachments	
Locating Interconnection Agreement Information and Attachments	Error! Bookmark not defined.
Locating MRD Information Attachments	Error! Bookmark not defined.
Locating One-line Attachments	Error! Bookmark not defined.
Locating Permit Attachments	Error! Bookmark not defined.
Locating Proof of Site Control Attachments	Error! Bookmark not defined.
Locating RARF Attachments	Error! Bookmark not defined.
Locating Screening Study Attachments	Error! Bookmark not defined.
Locating Synchronous Resonance Study Attachments	Error! Bookmark not defined.
Locating Water Declaration Attachments	
Locating Attachments Not Assigned to a Phase of Study or Attachment Ty	<u>/pe</u> Error! Bookmark not defined

Locating Attachments Uploaded Within a Specific Date Range

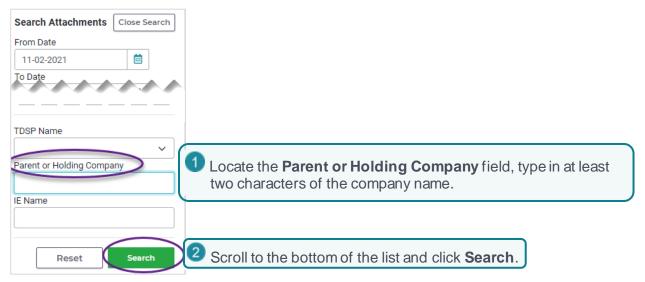


Locating Attachments by INR Number

You can use the **INR Number** field to search for all INRs that have the same COD year (like 23), or specific range of INRs (like INR01), or a specific INR (all 8 characters in the YYINR#### format).



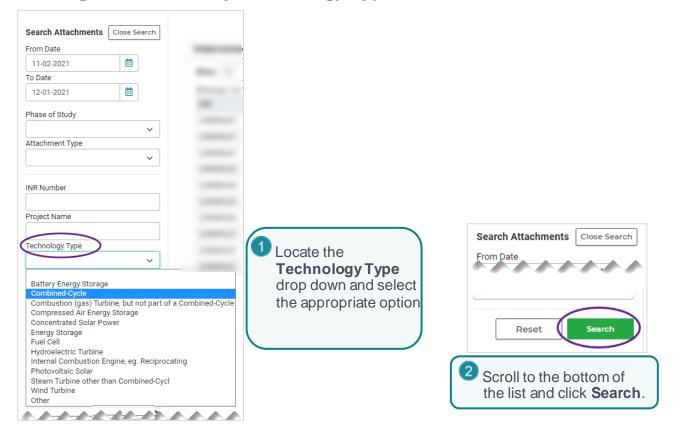
Locating Attachments by the Name of the Parent or Holding Company



Locating Attachments by Project Name

Search Attachments Close Search		
From Date		
11-02-2021		
To Date		
12-01-2021		
Phase of Study		Search Attachments Close Search From Date
Attachment Type		lionibute
INR Number		Reset Search
Project Name Technology Type	Locate the Project Name field and type in at least two characters.	2 Scroll to the bottom of the list and click Search .

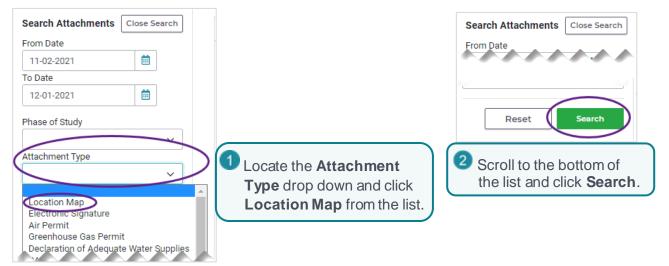
Locating Attachments by Technology Type



Locating Attachments by Service Provider Name

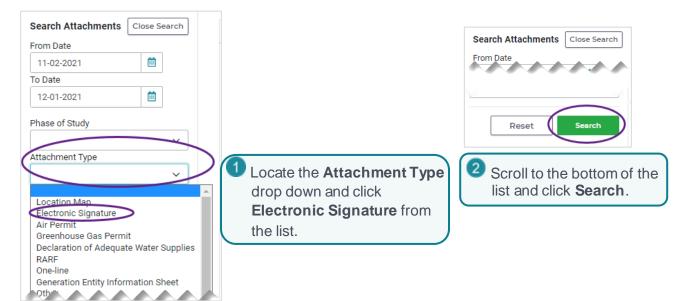
From Date	
County	1 Locate the TDSP drop down and click the
Parent or Holding Company IE Name Reset	appropriate option from the list.

Locating County Map Attachments



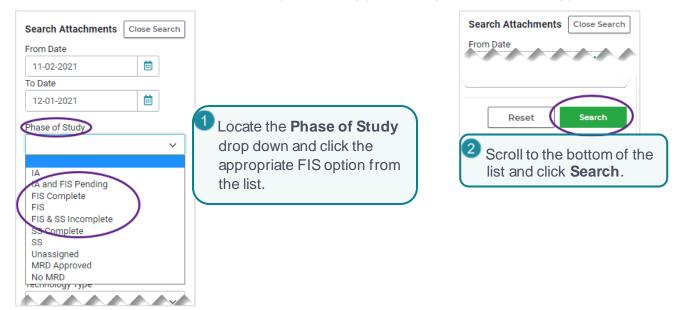
Locating Electronic Signature Attachments

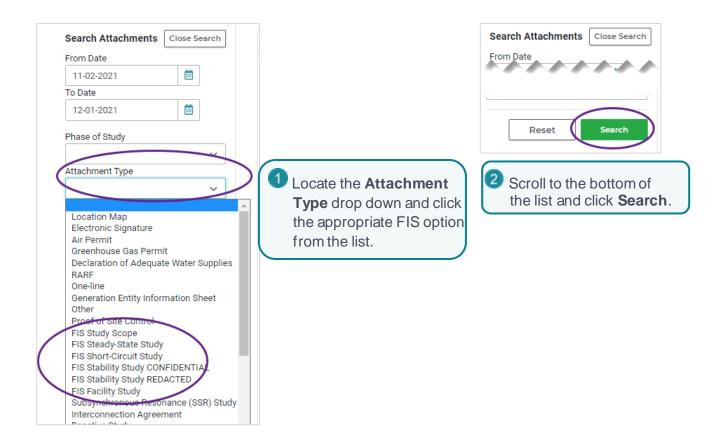
The system automatically uploads the required documents when they are signed online, including the Generation Entity Information Sheet required to submit an INR and the receipt for p ayment for the online application and for studies performed.



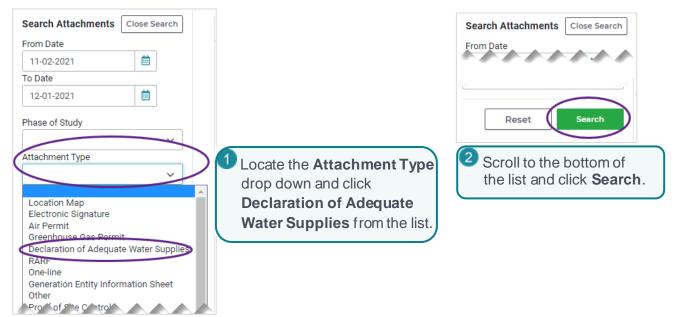
Locating FIS Attachments

You can located FIS attachments from a specific study phase or by their attachment type.



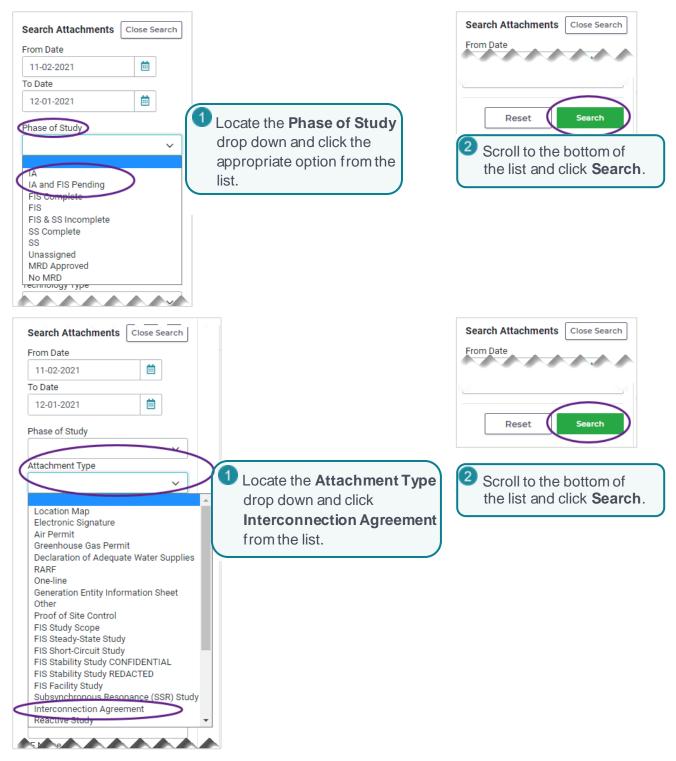


Locating Generation Entity Information Sheet Attachments



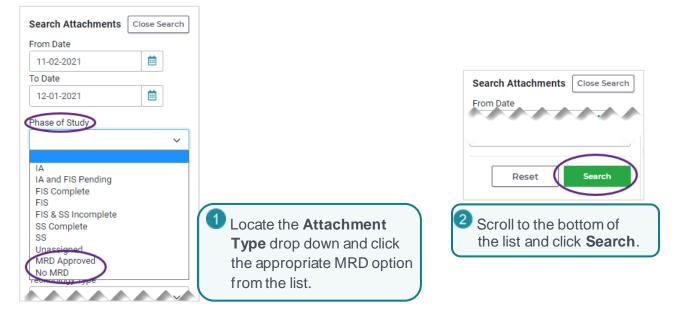
Locating Interconnection Agreement Information and Attachments

You can locate Interconnection Agreements and pending agreements from a specific study phase or by their attachment type.

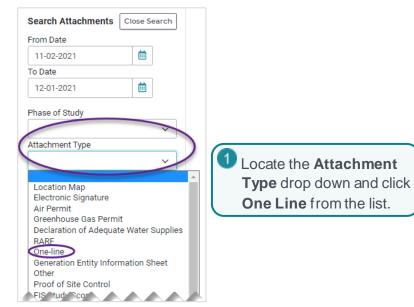


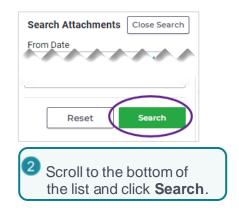
Locating Model Ready Date Information Attachments

You can locate MRD attachments by two types.



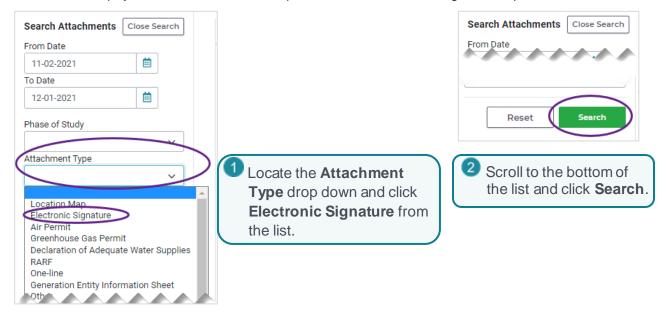
Locating One-line Attachments





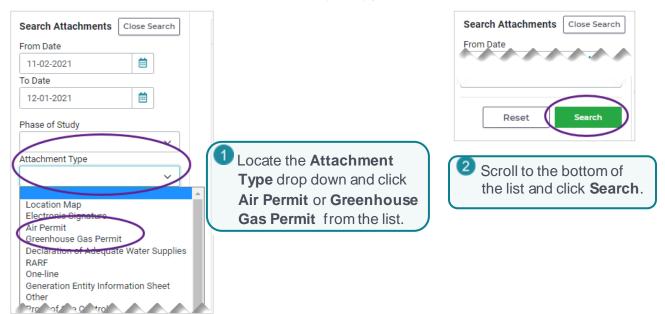
Locating Payment Invoices and Receipts

You can locate payment invoices and receipts from the Electronic Signature option.

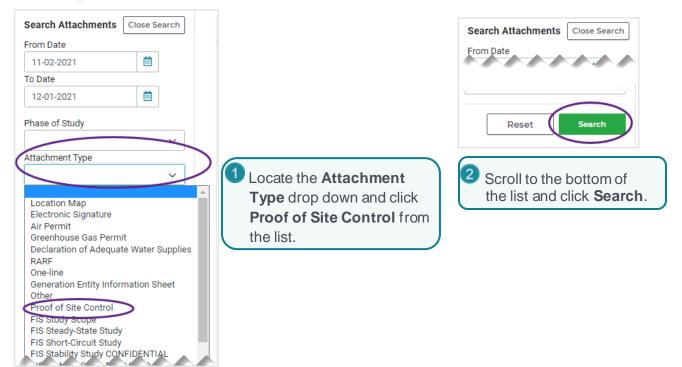


Locating Permit Attachments

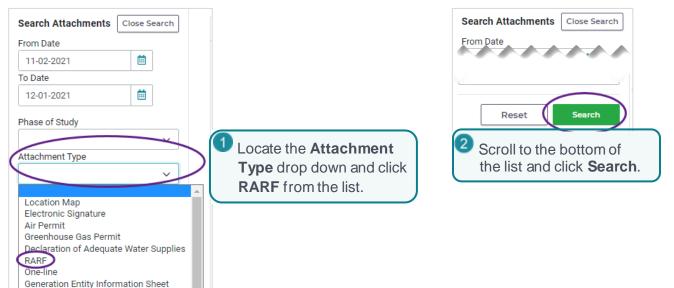
You can locate Air Permits and Greenhouse Gas (GHG) permits as attachments..



Locating Proof of Site Control Attachments



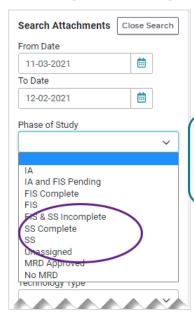
Locating RARF Attachments



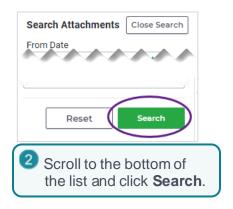
Other

Proof of Site Control

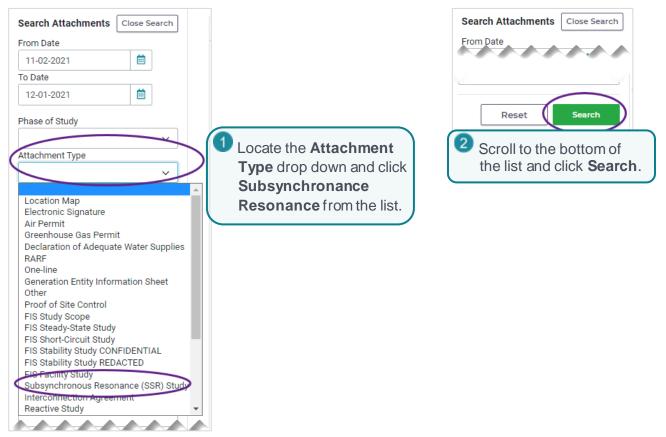
Locating Screening Study Attachments



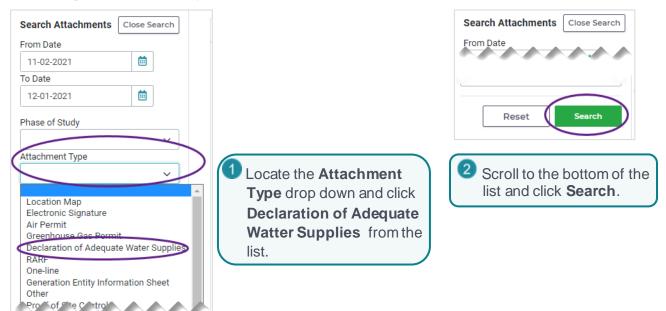
Locate the **Phase of Study** drop down and click the appropriate option from the list.



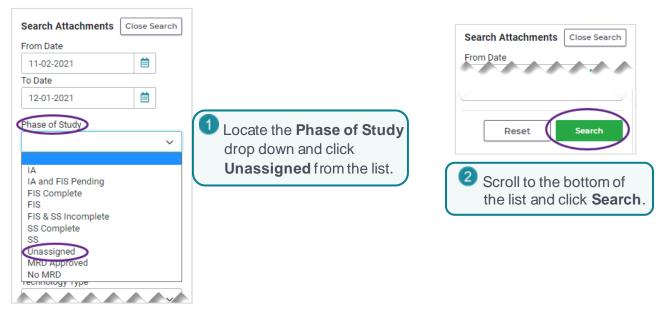
Locating Synchronous Resonance Study Attachments



Locating Water Supply Declaration Attachments



Locating Attachments Not Assigned to a Phase of Study



Reviewing Draft Documents

When you receive an email about reviewing a document, you can access the document in the *Attachments List* from the *Interconnection Request List* page. You can search for the document to review by its INR number, project name, or TDSP referenced on the email as well as the IE/RE who uploaded the document. Refer to *Locating Specific Attachments Using the Search Attachments Pane* in the section above.

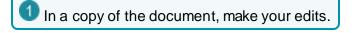
Access the Attachments List

<i>ercot</i> ⊱ Interconn	ection Service	s							
슈 Home 🖵 Interconne	ection Interco	nnection Requ	est List Attachment L	1 At tl	ne to k the	p of Atta	the <i>Inte</i>	e <i>rconnectior</i> nt List tab.	n Request List,
GINR INR List									
Show 10 v entri Showing 1 to 10 of 103		rational INR's	Show Cancelled INR	's					1
Action	TSP	INR	Project Name	Application Type	Tech	MW	POI	Projected	l l

Locate and Open the Document

onn	ection								
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2	2INR0025	10-06-2021	10-19-2021	TSP1	One-line	Configuration.PNG	k tha	linked at	tachment n
2	2INR0025	10-07-2021	10-20-2021	TSP1	Electronic Signature	PaymentInvoice_163353	K the		
2	2INR0025	10-07-2021	10-20-2021	TSP1	Electronic Signature	PaymentReceipt_1633536099831.pdf	Final	BIG WIND 3	10-06-2021 11:01:39
2	2INR0025	10-07-2021	10-20-2021	TSP1	SS Study	SSS.pdf	Draft	BIG WIND 3	10-06-2021 11:01:39
2	2INR0025	10-08-2021	10-21-2021	TSP1	RARF	rarf.zip	Draft	BIG WIND 3	10-07-2021 09:38:49
1	22INR0100	10-08-2021	10-21-2021	TSP6	One-line	Site16.PNG	Final	BLUEBONNET	10-07-2021 09:39:58
2	2INR0100	10-08-2021	10-21-2021	TSP6	Electronic Signature	PaymentInvoice_1635963878909.pdf	Final	BLUEBONNET	10-07-2021 09:39:58
2	2INR0100	10-08-2021	10-21-2021	TSP6	Electronic Signature	PaymentReceipt_1635963878914.pdf	Final	BLUEBONNET	10-07-2021 09:39:58
2	2INR0100	10-11-2021	10-22-2021	TSP6	Location Map	operation.PNG	Final	BLUEBONNET	10-08-2021 16:29:27
	2INR0100	10-11-2021	10-22-2021	TSP6	Other	MockAttachment.zip	Final	BLUEBONNET	10-08-2021 16:30:11

Prepare and Return Your Review Comments



2 Go back into the email and click **Reply**.

3 Attach the document with your edits.

4 Click Send.

OR



In the original email, click **Reply**.

2 Record your edits.

3 Click Send.

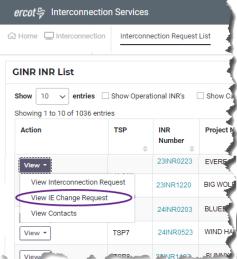
Viewing TSP Milestones

From the top of this INR *Review* page, you can click **TSP Key Milestones** to display project dates and when they were achieved (or, from the *Interconnection Request List*, click **Continue**).

ercot 🎙	Interconnection Se	ervices			He	ello TSP Electric	Texas	My Account 💄	Log Out 🕞
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		System Impact Study No attachments to display							
		Interconnection Agreement Dates Original Date Amended Date Interconnection Agreement Docu No attachments to display							
		Other Key Milestones Notice to Proceed Financial Commitment							
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Viewing INR Change Requests Submitted by IE/RE

To request changes and additions to the INR information, the IE/RE who submitted the INR can submit change requests and you can view these requests from the TSP Dashboard.





1 Locate the INR and click **View IE Change Request** from the View dropdown.



Replace with TSP View

Requesting FIS Change Requests

As a TSP, you can add change requests to have a draft of the FIS Study Scope reviewed and then upload the Final FIS Study Scope document as well as request an FIS Study and Study Start Dates. You can add the change requests one at a time, or click on the three FIS options all at one time and move through tabs.

Uploading the FIS Study Scope Draft for Review

Start the Change Request from Your Interconnection Request List

ercot - Interconnection Services Interconnection Request List Attachment 分 Home ☐ Interconnection **GINR INR List** Show 10 ✓ entries □ Show Operational INR's Show Cancelled INR's Showing 1 to 10 of 1036 entries Action TSP Project Name INR Number TSP1 23INR1120 BIG WIND 3 View Add Change Re Locate the INR in your Interconnection Request List and View click Add Change Request button.

Select FIS Study Scope

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Select all milestones you would like to	o create or update today:		
Q FIS Study Scope	FIS Study Start Dates	FIS Studies	We are here to help!
Click the FIS Stu	Idv Scope option	System Impact Study	You can read all of the details on the process in the Resource Interconnection Handbook found here.
			Contact Us ResourceIntegrationDepartment@erc ot.com
			ERCOT Help Desk Phone: +1 512 248-6800
	2 (Click the Let's Get Sta	arted button.

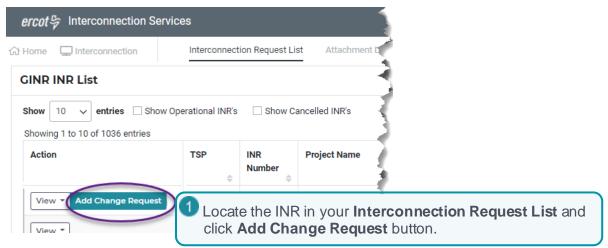
Enter FIS Study Scope Details

		Hello,	TSP Electric Texas	My Account 💄 🛛 Log Out 🕩
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Uploading the FIS Study Scope Final Results

After the FIS Study Scope has been reviewed and all edits have been incorporated, you can add the change request to upload the Study Scope document final

Start the Change Request from Your Interconnection Request List



Select FIS Study Scope

<i>ercot</i> 券 Change Request for 22INR0558	Hello, TSP	Electric Texas My Account 💄 🛛 Log Out 🗭 🕐
TSP Change Request for Key Milestones - Project		
Select all milestones you would like to create or update today:		
CQ FIS Study Scope FIS Study Start Dates	FIS Studies	We are here to help!
1 Click the FIS Study Scope option.	System Impact Study	You can read all of the details on the process in the Resource Interconnection Handbook found here.
		Contact Us ResourceIntegrationDepartment@erc ot.com
		ERCOT Help Desk Phone: +1 512 248-6800
Click t	he Let's Get Started	button. Let's Get Started!

Upload the Final

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Update: 11 Funded Date 11-15-2021	-19-2021 /		Entities Contract	Click Final. te you final study to be viewed by the Click the checkbo		nterconnecting
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			FIS Study Scope			Select File
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Cancel Change Rec	uest		Olick the	Select file drop	down. 🗤	Continue
			B Navigate	to the file on you	r C	
			computer ar	nd click it.		4 Click Cont
			Click Op	en.		

Submit the Change Request

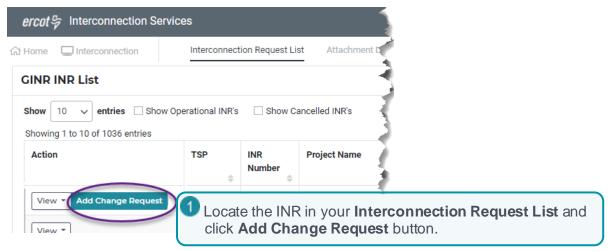
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Comments 2	Type in any	details or info	rmation ab	out this update.	
You can add or remo	ove data topics fro	m this change request	view change op	tions 3 Click Sul	omit Change Rec
Back Cancel Change Request				Print Form	Submit Change Request

Requesting FIS Change Requests

Requesting an FIS Study Start Date

Once the Study Scope documents have been reviewed and signed on, you can submit an optional change request for studies that must be completed in the FIS Study.

Start the Change Request from Your Interconnection Request List



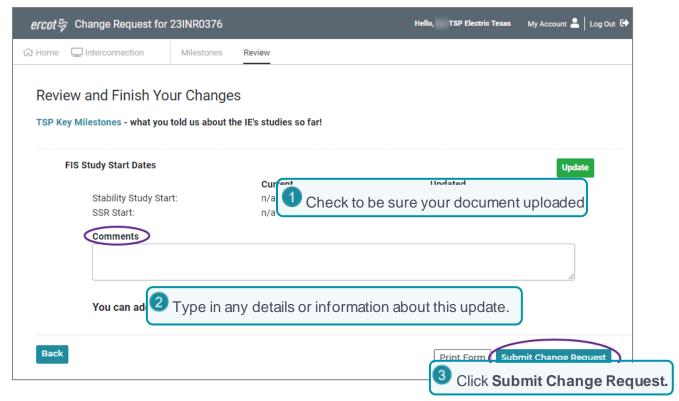
Select FIS Study Start Dates

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C FIS Study Scope	he FIS Study Start Date	FIS Studies Provide the second state of the s	We are here to help! You can read all of the details on the process in the Resource Interconnection Handbook found here. Contact Us ResourceIntegrationDepartment@erc ot.com ERCOT Help Desk Ehone: +1 512 248-6800
	2 Cli	ick the Let's Get Star	ted button. Let's Get Started!

Enter the Dates

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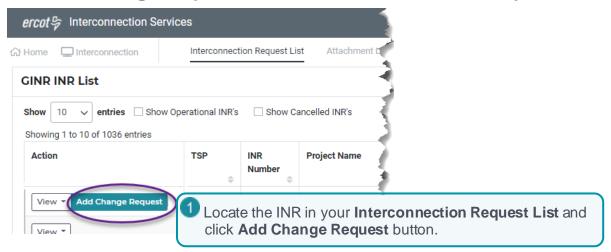
Submit the Change Request



Requesting FIS Studies

After the Study Scope has been determined and funded, you can submit the Change Request to upload documents containing the actual report results of the FIS Studies.

Start the Change Request from Your Interconnection Request List



Select FIS Studies

ercot ♀ Change Request fo	or 23INR0376	Hello, TSP Electr	ic Texas My Account 💄 🛛 Log Out 🕩
값 Home 🛛 Interconnection	Milestones Review		
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Q FIS Study Scope	FIS Study Start Dates	FIS Studies	We are here to help!
Agreement	Q Other Key Milestones	lick the FIS Studies option.	You can read all of the details on the process in the Resource Interconnection Handbook found here.
			Contact Us ResourceIntegrationDepartment@erc ot.com
			ERCOT Help Desk Phone: +1 512 248-6800
	20	Click the Let's Get Started b	utton. Let's Get Started!

Select the Studies to Conduct

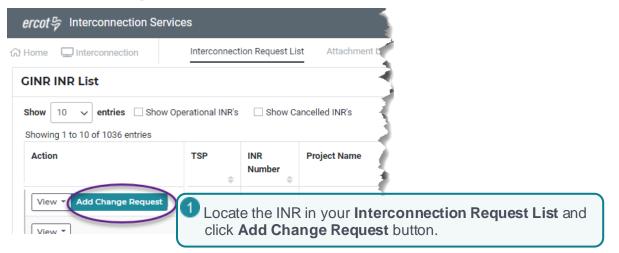
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FIS Study ScopeFinal	.docx	Final	FIS	11-29-2021	
Comments 2 Type in any details or information about this update.					
You can add or remo	ove data topics from this	s change request	view change opt	tions 3 Click Sub	omit Change Req
Back Cancel Change Request				Print Form	Submit Change Request

Recording the Financial Commitment Date

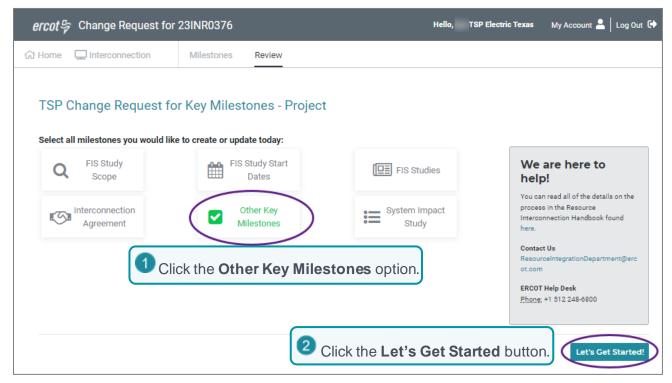
When the Financial Commitment is signed with the IE/RE, you can record the date using a change request and also update this date if necessary.

Recording the Financial Commitment Date

Start the Change Request from Your Interconnection Request List



Select Other Key Milestones



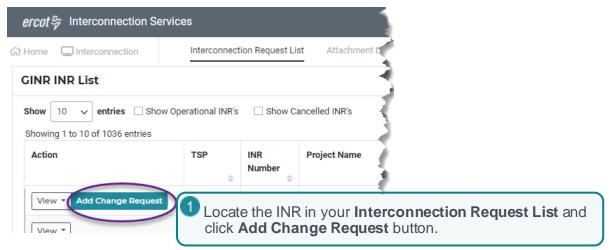
Record the Financial Commitment Date

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Back			Print Form	Submit Change Re	quest

Updating the Financial Commitment Date

Start the Change Request from Your Interconnection Request List



Select Other Key Milestones

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습 Home 🖵 Interconnection	Milestones Review		
TSP Change Request for select all milestones you would like	or Key Milestones - Project e to create or update today:		
Q FIS Study Scope	FIS Study Start Dates	FIS Studies	We are here to help!
Interconnection Agreement	Other Key Milestones	System Impact Study	You can read all of the details on the process in the Resource Interconnection Handbook found here.
1 Cli	ck the Other Key Miles	t ones option.	Contact Us ResourceIntegrationDepartment@erc ot.com ERCOT Help Desk Phone: +1 512 248-6800
	2 C	lick the Let's Get Start	ed button.

Update the Financial Commitment Date

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Back			Print Form	Submit Change R	Request

Adding the Interconnection Agreement Information

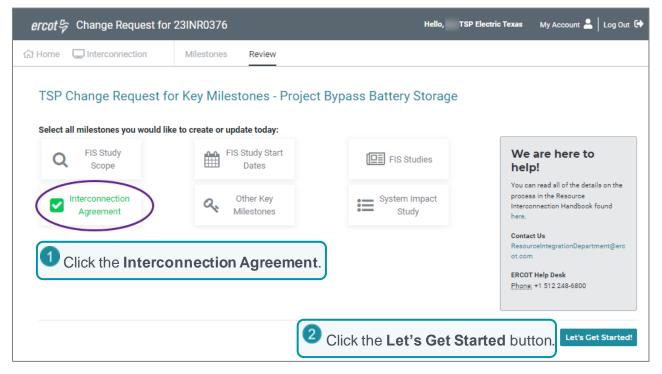
When the Interconnection Agreement has been signed, you can record the signed date and upload a copy of the agreement file. You can also amend this date and upload an alternate file.

Submitting the Original Interconnection Agreement

Start the Change Request from Your Interconnection Request List

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슈 Home 🖵 Interconnection	Interconnecti	ion Request List	Attachment D	ł
GINR INR List				
Show 10 ✓ entries □ Show Showing 1 to 10 of 1036 entries	Operational INR's	Show Can	celled INR's	
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View Add Change Request View	Locate click	e the INR Add Char	in your Intero nge Request	connection Request List and button.

Select Interconnection Agreement



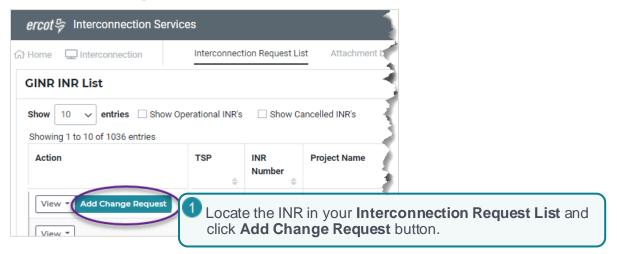
Fill In the Signed Date

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Comments				
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Back			Print Form	Submit Change Request

Updating the Interconnection Agreement Date

Start the Change Request from Your Interconnection Request List



Select Interconnection Agreement

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슈 Home 🖵 Interconnection	Milestones Review		
TSP Change Request for Select all milestones you would like	r Key Milestones - Project e to create or update today:	Bypass Battery Storage	
Q FIS Study Scope	FIS Study Start Dates	FIS Studies	We are here to help!
Interconnection Agreement	Q Other Key Milestones	System Impact Study	You can read all of the details on the process in the Resource Interconnection Handbook found here.
Click the Interco	nnection Agreement.)	Contact Us ResourceIntegrationDepartment@erc ot.com ERCOT Help Desk Phone: +1 512 248-6800
	2	Click the Let's Get Sta	rted button.

Fill In the Signed Date

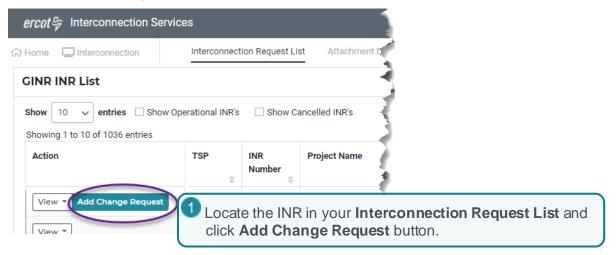
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			Interconnection Agreement	
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			2 Click the C	Continue button.

Recording the Notice to Proceed Date

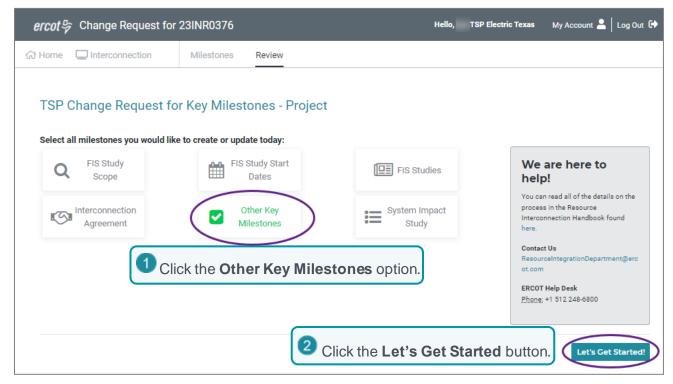
When the Notice to Proceed has been signed and received, you can record the date it was signed.

Recording the Original Notice to Proceed Date

Start the Change Request from Your Interconnection Request List



Select Other Key Milestones



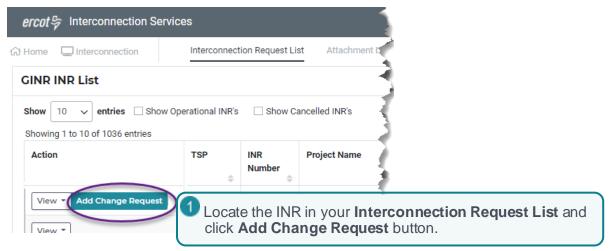
Record the Notice to Proceed Date

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Other Key Milestones Notice to Proceed Current: n/a Update: 11-24-2021		 Or, click the calendar. Select the appropriate month and year from the drop downs. Click the appropriate day on the calendar.
		2 Click Continue.

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Review and Finish Your	Changes			
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Notice to Proceed:	n/a	11-24-2021		
Financial Commitme	nt: n/a	11-24-2021		
Comments				
You can add or ren	nove data topics from th	is change request view change options		
Back			Print Form	Submit Change Request

Updating the Notice to Proceed Date

Start the Change Request from Your Interconnection Request List



Select Other Key Milestones

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TSP Change Request fo Select all milestones you would like	r Key Milestones - Project e to create or update today:		
Q FIS Study Scope	FIS Study Start Dates	FIS Studies	We are here to help!
Interconnection Agreement	Other Key Milestones	System Impact Study	You can read all of the details on the process in the Resource Interconnection Handbook found here.
	ck the Other Key Miles	tones option.	Contact Us ResourceIntegrationDepartment@erc ot.com ERCOT Help Desk Phone: +1 512 248-6800
	2 C	lick the Let's Get Start	ed button.

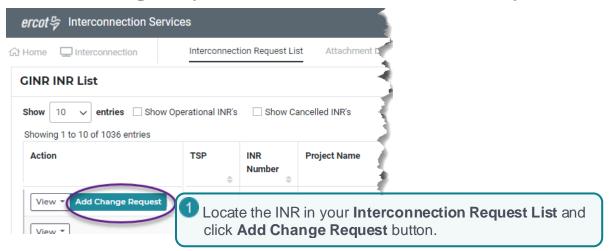
Update the Notice to Proceed Date

<i>ercot</i> 号 Change Request for	23INR0376	Hello, TSP Electric Texas My Account 🚨 Log Out 🗭
슈 Home 🖵 Interconnection	Milestones Review	
	1	Type in the mm-dd-yyyy that the Notice to Proceed was updated.
Other Key Milestones Notice to Proceed Current: r 11-24-2021 Update: 12-02-2021		 Or, click the calendar. Select the appropriate month and year from the drop downs. Click the appropriate day on the calendar.
		Click Continue

<i>ercot</i> 号 Change Request fo	or 23INR0376	Hell	o, TSP Electric Texas	My Account 🚨 🛛 Log Out 🗭
슈 Home 🛛 Interconnection	Milestones Revie	w		
Review and Finish Your	Changes			
TSP Key Milestones - what you tol	d us about the IE's studies	so far!		
Other Key Milestones				Update
	Current	Updated		
Notice to Proceed:	n/a	11-24-2021		
Financial Commitme	nt: n/a	11-24-2021		
Comments				
You can add or ren	nove data topics from th	is change request view change options		
Back			Print Form	Submit Change Request

Adding Operational Limit Details

Start the Change Request from Your Interconnection Request List



Select Other Key Milestones

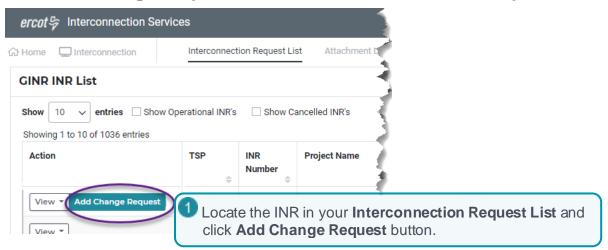
ercot b Change Request for	r 23INR0376	Hello, TSF	PElectric Texas My Account 💄 🛛 Log Out 🕩
슈 Home 🖵 Interconnection	Milestones Review		
TSP Change Request for select all milestones you would like	or Key Milestones - Project ke to create or update today:		
Q FIS Study Scope	FIS Study Start Dates	FIS Studies	We are here to help!
Interconnection Agreement	Other Key Milestones	System Impact Study	You can read all of the details on the process in the Resource Interconnection Handbook found here.
	ick the Other Key Miles	tones option.	Contact Us ResourceIntegrationDepartment@erc ot.com
			ERCOT Help Desk Phone: +1 512 248-6800
	2 CI	lick the Let's Get Start	ed button.

Record the Date

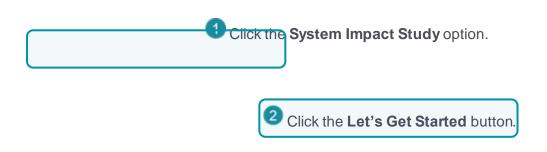
<i>ercot</i> 号 Change Request for	23INR0376	Hello, TSP Electric Texas	My Account 💄 Log Out 🕩
슈 Home 🛛 🖵 Interconnection	Milestones Review		
Review and Finish Your (Changes		
TSP Key Milestones - what you told			
Other Key Milestones	Current	Updated	Update
Notice to Proceed:	n/a	11-24-2021	
Financial Commitment:	n/a	11-24-2021	
Comments			
You can add or remo	ve data tonics from this chang	ge request view change options	
	ve data topics nom this chang	ge request them change options	
Back		Print Form St	ubmit Change Request

Requesting the System Impact Study

Start the Change Request from Your Interconnection Request List



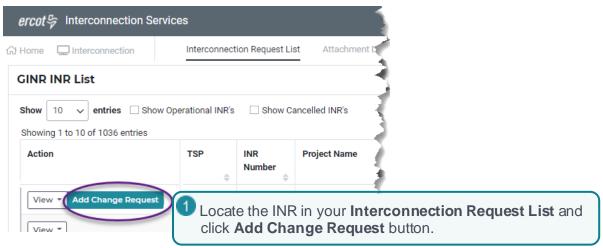
Select System Impact Study



<i>ercot</i> 号 Change Request for :	23INR0376			Hello, TSP Electric Texas	My Account 💄 🛛 Log Out 🕞
값 Home 🛛 🖵 Interconnection	Milestones R	leview			
Review and Finish Your	-				
TSP Key Milestones - what you told	l us about the IE's stu	idies so far!			
FIS Study Scope Signed and Funded Date: Signed Date: Study Scope Documer	Cu n/a n/a		Updat 11-19- k to be sur		update t uploaded
File Name		Version	Туре	Date Attached	
FIS Study Scope.docx	t i i i i i i i i i i i i i i i i i i i	Draft	FIS	11-19-2021	
FIS Study ScopeFinal	.docx	Final	FIS	11-29-2021	
Comments 2	Type in any	details or info	rmation ab	out this update.	
You can add or remo	ove data topics fro	m this change request	view change op	tions 3 Click Sul	omit Change Rec
Back Cancel Change Request				Print Form	Submit Change Request

Recording the Date of a System Upgrade

Start the Change Request from Your Interconnection Request List



Select Other Key Milestones

Milestones Review		
Key Milestones - Project		
o create or update today:		
FIS Study Start Dates	FIS Studies	We are here to help!
Other Key Milestones	System Impact Study	You can read all of the details on the process in the Resource Interconnection Handbook found here.
the Other Key Miles	tones option.	Contact Us ResourceIntegrationDepartment@erc ot.com
		ERCOT Help Desk Phone: +1 512 248-6800
2 c	lick the Let's Get Start	ed button. Let's Get Started
	reate or update today: FIS Study Start Dates Other Key Milestones the Other Key Miles	FIS Study Start Dates Other Key

Record the date

Appendix A. Managing Your TSP User Account

Changing Your User Login Name

You cannot change your user name since it comes from your MPIM profile.

Updating Your Account Information

Your account contains your first and last name, email address, telephone number, and password.

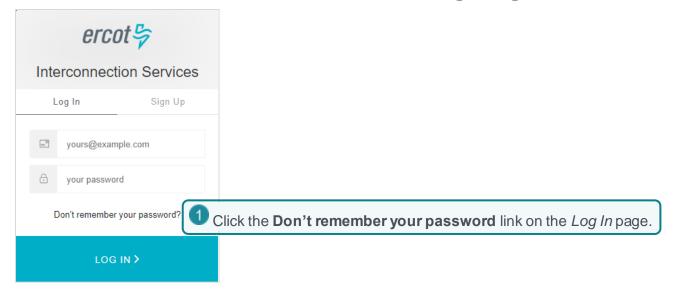
You can update your name and telephone number by clicking the My Account link at the top of the Interconnection Request List page.

You cannot change your email address since it serves as your login name.

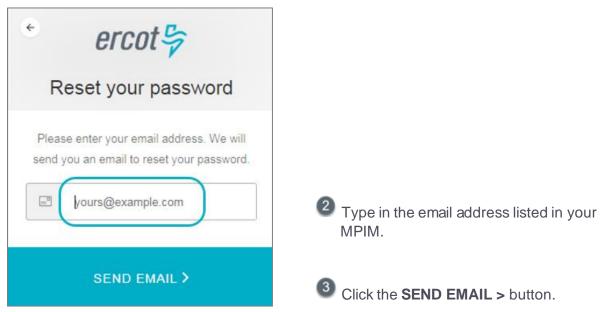
Resetting Your Password

You can reset your password from the Interconnection Services Log In page.

Click the Link on the Interconnection Services Login Page



Reset Your Password Page



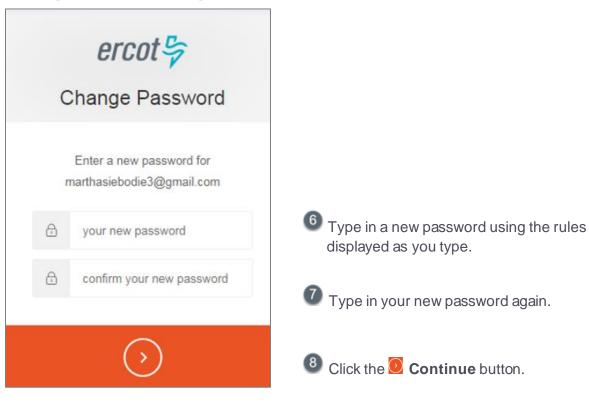
Confirmation Email

G	ginr@ercot.com Wed 11/28/2018, 11:19 AM You ⊗	5	«	\rightarrow	
	Password Change Request				
	You have submitted a password change request				
	If it wasn't you please disregard this email and make sure login to your account. If it was you, then confirm the p change.			ill	
	CHANGE MY PASSWORD				
	Thanks!				
	The Electric Reliability Council of Texas				
	If you did not make this request, please contact us by this mail.	repl	lying	to	

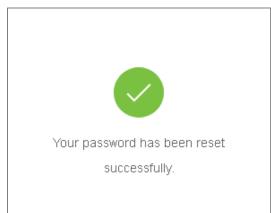
Go to your email and open the email message with **Reset your ERCOT Resource** Interconnection Services Password in the subject line.

5 Click the CHANGE MY PASSWORD button.

Change Password Page



Success Page



To close this page and return to the Interconnection Requests List, click the link in this message or the ercot logo in the upper left to return to the Interconnection Requests List.

Appendix B. Changing Your Multifactor Authentication Method

For login security, ERCOT Interconnection Services uses multi-factor authentication (MFA). This means that you must supply two types of identifying information when you log in - something you know and something that can be obtained from a device in your possession. ERCOT uses your email address and password from your MPIM profile as your login credentials. After you reset your password and specified which authentication method you will use, you scanned a barcode from the ERCOT Interconnection Services page into the authentication app installed on your phone (or manually typing in a special code if you do not have a smartphone).

Prior to sign up, you were asked to download either of the free apps (Auth0 Guardian or Google Authenticator) to your smartphone from the App Store or Google Play. Or, if you already use a third-party authentication app on your phone, you most likely can use that app. If you do not have a smartphone, you can use the SMS text message app (which is far less secure than the smartphone apps).

When you log in to Interconnection Services, ERCOT verifies that you correctly entered your username/password combination as the first authentication tier and then sends you a text message on your smartphone to verify your identity.

If you need to change the MFA application that associates your device with Interconnection Services, you must first submit a Help Desk ticket to ERCOT that requests your MFA to be reset. When ERCOT removes your MFA app setting, you will receive an email with the ENROLL YOUR DEVICE button that you click to display the ERCOT Authentication Method page and set up your MFA app and device again.

A link is provided in the email for more information on multifactor authentication.

If you plan to use the Auth0 Guardian or Google Authenticator app, you should download the appropriate app to your smartphone from the App Store or Google Play before you begin.

After scanning the app bar code, the ERCOT Recovery Code page displays with a string of 24 characters and numbers. You should have a text editor (such as Notepad open) so you can easily copy and paste the numbers, and then save it to a location on your computer where you keep this kind of information.

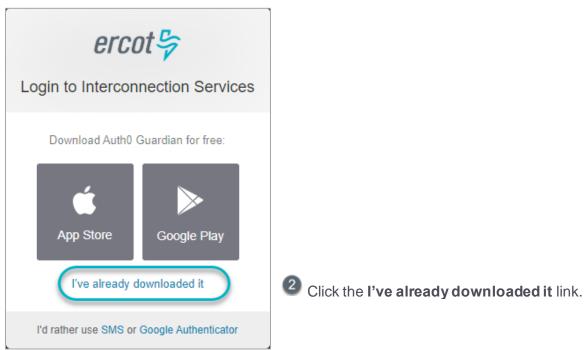
1 Click the ENROLL YOUR DEVICE button.

Changing to Auth0 Guardian MFA

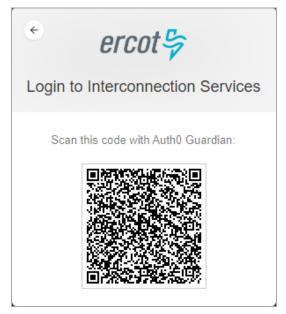
Email Invitation to Enroll Your Device

G	ginr@ercot.com				
Y	Mon 1/7/2019, 6:25 PM ∕ou ⊗			ن	$\checkmark \rightarrow \cdots$
			enroll a device		Guardian
	An administrat device.	or at ercot-ginr	-dev has invited	l you to er	nroll a
	Click https://au	th0.com/docs/	YOUR DEVI multifactor-		
		-	se you have an acc		t elec des

Authentication Method Page



Bar Code Page



When this page displays, open your

smartphone and click the **Guardian** app to open the app, which opens to the scanner page.

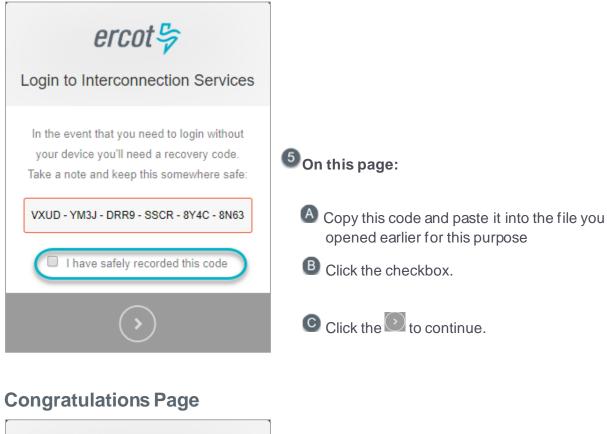
Note: If the Auth0 Guardian app does not open to the scanner page, click the + at the top of the page to add your new account.

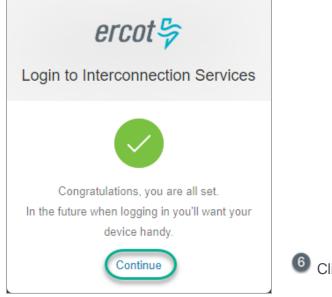
Scan Bar Code Page (On Phone)



Position your phone over the bar code until the bar code border turns green to indicate it was scanned.

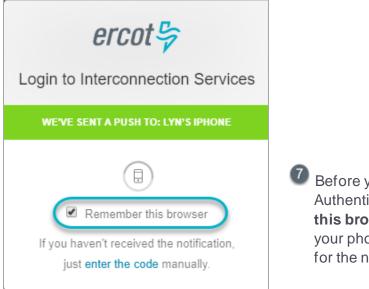
Recovery Code Page





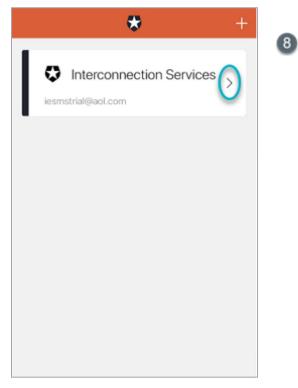
6 Click the **Continue** link.

Sent Push and Remember This Browser Page



Before you go to your phone to get the Authenticator message, click the **Remember this browser** checkbox to avoid having to go to your phone to get the authentication message for the next 30 days.

Guardian Auth0 Notification (On Phone)



On your phone, locate the Interconnection Services message and click >.

Guardian Auth0 Push Message (On Phone)

*
AUTHENTICATION REQUEST
ercot-ginr-dev
BROWSER Chrome (70.0.3538.77), Windows (10)
LOCATION Sandy, United States
DATE November 12, 2018 at 9:09:27 AM
Deny Allow



9 And then. click the **Allow** button.

Your Interconnection Requests List

<i>ercot</i> 号 Interco	nnection Services					4
	TSP Dashboar	d Interco	nnection Request List	Attachments	List	
Interconnectio	on Request List					i I
Show 10 • entrie Showing 1 to 4 of 4 entrie		Show Can	celled INR's			
Action	TSP ↓↑	INR Number ↓↑	Project Name ↓↑	Tech Type ↓†	MW ↓↑	POI
View -	CITY OF AUSTIN DBA AUSTIN ENERGY (TDSP)	21INR0205	LynMSolarFarm	СР	10	SE 199
View -		21INR0208	Lyn3	HY	5000	POI
View - Add Change F	CENTERPOINT ENERGY HOUSTON ELECTRIC LLC (TDSP)	22INR0217	Lyn Power2	WT	9600	71 just west of Smithvi
View -		22INR0218	Lyn2AddOn	WT	900	SE Corner of 71 & 21

Changing to Google Authenticator MFA

Email Invitation to Enroll Your Device

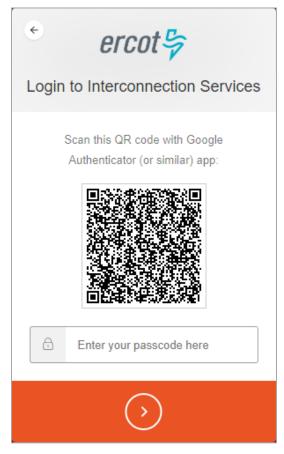
Invitat	ion to enroll with Guardian MFA
G	$\begin{array}{llllllllllllllllllllllllllllllllllll$
	You've been invited to enroll a device with Guardian for multi-factor authentication.
	An administrator at ercot-ginr-dev has invited you to enroll a device.
	ENROLL YOUR DEVICE Click https://auth0.com/docs/multifactor- authentication/guardian/user-guide for more details.
	You're receiving this email because you have an account in ercot-ginr-dev.

Authentication Method Page

Cogin to Interconnection Services Download Auth0 Guardian for free: Download Auth0 Guardian for free: Cogie Play Cogie Play Ver already downloaded it Click the Google Authenticator link.

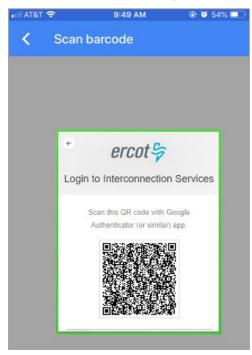
1 Click the ENROLL YOUR DEVICE button.

Bar Code Page



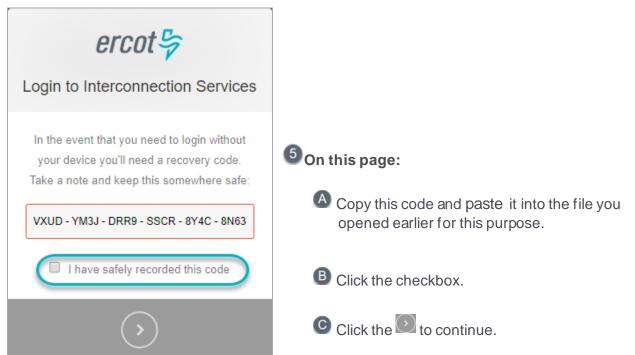
3 When this page displays, open your smartphone and click the Google Authenticator app to open it..

Scan Bar Code Page (On Phone)

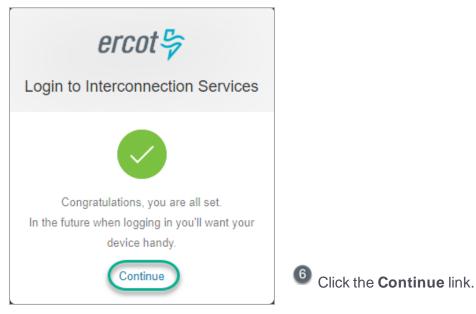


Position your phone over the bar code until the bar code border turns green to indicate it was scanned.

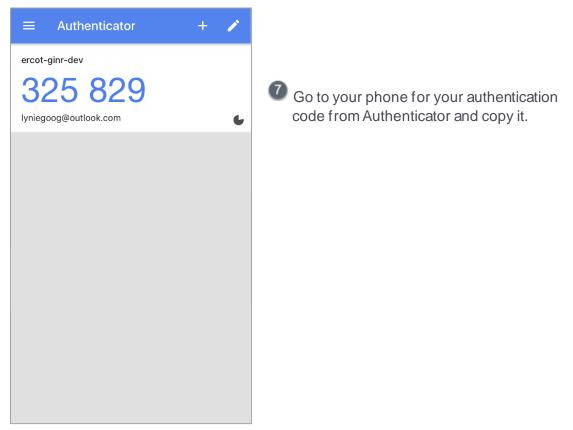
Recover Code Page



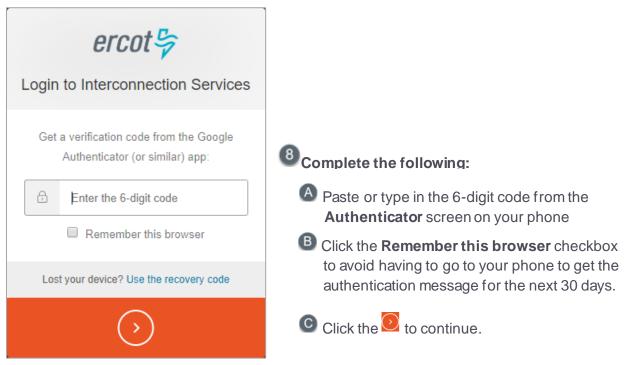
Congratulations, You are all Set Page



Authenticator App Code Page (On Phone)



Enter Code from Authenticator Page

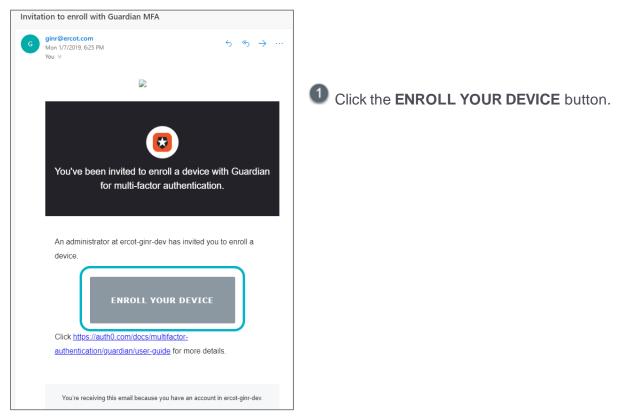


Your Interconnection Requests List

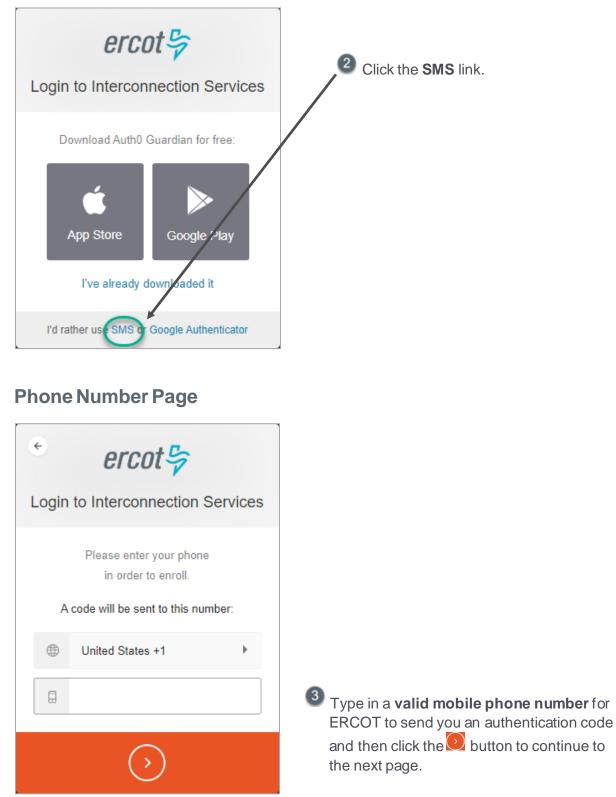
<i>ercot</i> 号 Interco	nnection Services					4
	TSP Dashboar	d Interco	nnection Request List	Attachments	List	
Interconnectio	on Request List					i I
Show 10 • entrie Showing 1 to 4 of 4 entrie		Show Can	celled INR's			
Action	TSP ↓↑	INR Number ↓↑	Project Name ↓↑	Tech Type ↓†	MW ↓↑	POI
View -	CITY OF AUSTIN DBA AUSTIN ENERGY (TDSP)	21INR0205	LynMSolarFarm	СР	10	SE 199
View -		21INR0208	Lyn3	HY	5000	POI
View - Add Change F	CENTERPOINT ENERGY HOUSTON ELECTRIC LLC (TDSP)	22INR0217	Lyn Power2	WT	9600	71 just west of Smithvi
View -		22INR0218	Lyn2AddOn	WT	900	SE Corner of 71 & 21

Changing to the Less Secure SMS Text Message App for Non-Smartphones

Email Invitation to Enroll Your Device



Authentication Method Page



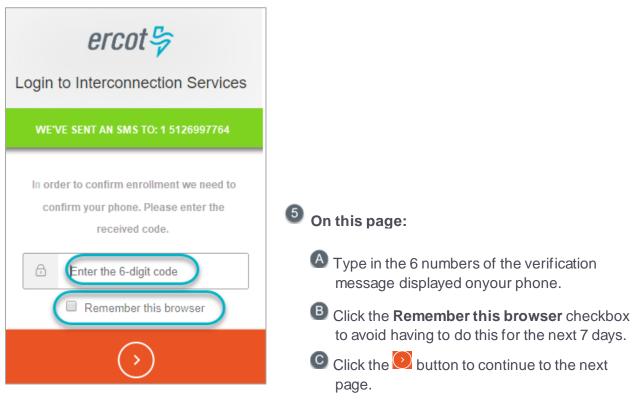
Open your phone and look for the verification

code message.

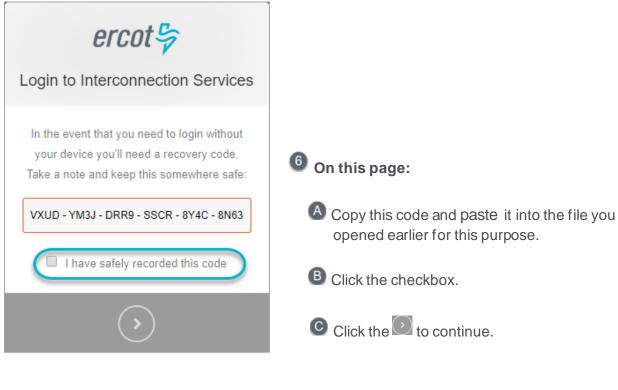
SMS Message on Phone

MESSAGES +1 (630) 409-4293 (324175)is your verification code for	in 1m

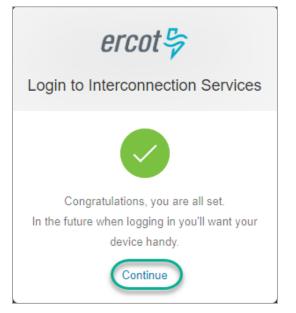
Enter the Authentication Code Page



Recovery Code Page



Continue Page



Click the Continue link.

Your Interconnection Request List

ercot For Interconnection Services							
	TSP Dashboar	d Interco	nnection Request List	Attachments	List		
Interconnectio	n Request List					4	
Show 10 • entries Showing 1 to 4 of 4 entries		Show Can	celled INR's				
Action	TSP	INR Number ↓↑	Project Name ↓↑	Tech Type ↓↑	MW ↓↑	POI	
View -	CITY OF AUSTIN DBA AUSTIN ENERGY (TDSP)	21INR0205	LynMSolarFarm	СР	10	SE 199	
View -		21INR0208	Lyn3	HY	5000	POI	
View - Add Change R	CENTERPOINT ENERGY HOUSTON ELECTRIC LLC (TDSP)	22INR0217	Lyn Power2	WT	9600	71 just west of Smithvi	
View -		22INR0218	Lyn2AddOn	WT	900	SE Corner of 71 & 21	

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Document Revision History