

RIOO User Guide – Creating a New SODG

Version 2.0 November 11, 2024

ERCOT RIOO Interconnection Services

To create a new Settlement Only Distribution Generator (SODG) and to get it interconnected to the ERCOT Network Model, the Resource Entity (RE) representing the SODG must use the Resource Integration and Ongoing Operations – Interconnection Services (RIOO – IS) application. RIOO – IS allows the RE to create an Interconnection Request (INR) for a new SODG site. The ERCOT Demand Integration team will review and process the INR. And, the RE can view the current status of the INR in RIOO throughout the timeline from the initial submission to when the new SODG is loaded into the production Network Model.

About this guide

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

Distributed Generation with installed capacity greater than 1 and up to 10 MW capable of providing a net export of energy into a TDSP's Distribution System (less than or equal to 60 kV) is required to register with ERCOT as an SODG. REs register SODGs using the <u>Resource Integration & Ongoing Operations (RIOO)</u> application. Instructions for setting up a RIOO user account can be found under RIOO Documentation on the <u>Resource Integration</u> <u>webpage</u>. The SODG registration process allows for energy injections to a TDSP's Distribution System to be accounted for in ERCOT market settlements. Energy from a registered SODG is settled with the SODG's designated Qualified Scheduling Entity (QSE) per ERCOT Nodal Protocols section 6.6. Registering an aggregation of DG units across multiple points of delivery as a single SODG is not allowed.

Note that this guides only applies to SODGs. Transmission-connected Settlement Only Generators (Settlement Only Transmission Generators (SOTGs) and Settlement Only Transmission Self-Generators (SOTSGs)) should follow the registration processes under the "Creating an INR in RIOO Interconnection Services" section of the <u>Resource Integration webpage</u>. Questions on these registrations should be sent to the ERCOT Resource Integration team (<u>ResourceIntegrationDepartment@ercot.com</u>).

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Before starting your INR

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

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

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

Check for electronic payment debit blocks

If you intend to submit INR payments by electronic checks drawn on your bank account (ACH payment instead of credit card), you should check with your financial institution to be sure you do not have an automatic debit block on your account for ACH transaction amounts. It may take at least two days to remove the block, which can cause processing delays for your INR. If you do have an automatic debit block on your account:

- Have your financial institution send you the form to authorize ACH transactions you will be making with ERCOT.
- On the form:
 - For Vendor, enter Authorize.net.
 - For Vendor ID, enter **1911718107**.
- Submit the form to your financial institution.

Have documents completed and ready to attach

While creating your INR for a new SODG, you may be required to attach a document.

- If the SODG will be using a meter read by a TDSP, the RE must request that the host TDSP completes a <u>TDSP</u> <u>Read Generation Metering Registration Form</u> and the RE must attach the form to the site registration submitted in RIOO.
- If the SODG will be using an ERCOT Polled Settlement (EPS) meter, then the TDSP Read Generation Metering Registration Form is <u>not</u> needed.
- Based on which type of metering is selected during the registration process in RIOO, the user will be alerted when a TDSP Read Form is required to be attached.

Coordinate a Production Load Date (PLD)

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

- The PLD must align with a scheduled production model load as listed on the current <u>Production Load</u> <u>Schedule</u>.
- The PLD will be at least 30 days after the RIOO registration submission is accurately completed.
- The RIOO application will indicate that if the requested PLD is fewer than 90 days out, it is classified as an interim update. However, SODG submissions meeting the 30-day PLD schedule <u>do not</u> require the RE to submit the **RE_Model_Interim_Update_Request** form.

Logging into RIOO

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



• Log into your RIOO account:

ercot 🦻				
	RIOO Se	ervices		
	Log In	Sign Up		
_	yours@examp	le.com		
a	your password	I		
Don't remember your password?				
LOG IN >				

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

C Intercor	nnection Services >	authenticator 325 829	APSSAGES IN 1m 530) 409-4293 175 is your verification code for
	AUTHENTICATION REQUEST	Ercot Services	Ercot Services
	Chrome (70.0.3538.77), Windows (10)	Get a verification code from the Google Authenticator (or similar) spp.	Get a verification code from the Google Authenticator (or similar) app.
	 DATE Nov 2, 2020 at 9:09:27 AM 	Remember this browser Lost your device? Use the recovery code	Remember this browser Lost your device? Use the recovery code
	Deny Allow		

- Select Remember this browser to avoid having to login multiple times:
 - Note that if this selection is not made, there may be issues saving and submitting your data



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

ercot 🛱	RIOO		Helio, Donald House My Account 온
යි Home	Update or add registration data	Resource Services Update or view your existing resource data.	
	Go to Interconnection Services - IS	SODG Ceneration	Load Resource

Creating request for a new SODG

- On the RIOO home screen, open Interconnection Services
 - $\circ~$ Interconnection Services is used to create a new SODG
 - Resource Services is used to update an existing SODG
 - See RIOO User Guide Updating an Existing SODG for details

ercot 💝	RIOO		Hello, Donald House My	y Account 8
යා Home	Second Services	Resource Services Update or view your existing resource data.		
	Go to Interconnection Services - IS	SODG Generation	Load Resource	

- The Interconnection Request List displays all requests that have been created by the RE along with the status of the request
- To begin, click on Start New Request to display the drop-down list
 - o Select Start as RE

ercot > Your Interconnection Requests						Helio, Donald House	My Account 🚢 Log Out 🕞
☆ Home							
Interconnection Request I show 10 v showing 1 to 0 of 0 entries Alert • Actions No matching records found	.İST Number ◎ Project Name	Primary Name	© Company	Status	Filter List By All Types V Se	arch 🔶 Last U	Start New Request • Start as IE Start as RE

- Select the Company (RE) for this project
 - o Note that if the user represents multiple REs, they will all be displayed in this drop-down list
- Select Distribution Connected under How will your project be connected?
- Select No under Project has Load Resource (LR)?
- Select Yes under Is your project a settlement only generation project?
 - o Then, select Settlement Only Distribution Generator SODG when the radial button appears
- Click Let's Go! to be taken to the SODG List screen

ercot ♀ Create New Interconnection Re	quest			
	Let's set your application ty	pe		
	Company Connection	Select your company for this project? (Required) MARLIN SOLAR LLC (RE) How will your project be connected? Transmission Connected Distribution Connected		~
	LR	Project has Load Resource (LR)? O Yes () No		
	\$06	Is your project a settlement only generation project?		
			Start Over	Let's Go!

- On the SODG List screen, all data submission panels are listed
 - Start indicates that nothing has been added to that panel
 - Edit in red indicates that the panel is either missing required information or that something needs to be corrected
 - Edit in green indicates that the panel has been completed but the user has the option to go back to the panel to make revisions
 - Clicking on **Edit** or **Start** will open that panel for data entry
- The panels can be completed in any order, but the way they are arranged in the application provides an orderly flow through the process
 - Progress can be saved, allowing the user to return to the application later to finish the submission
 - This guide will provide details on each panel

ercnt 😓	Interconnection Services	Hello, Donald House	My Account 🙎 Log Out 🗭	Help
Site Code	List			
යි Home	Settlement Only Distribution Generator			
SODG Back	Site Details		Required	Edit
	Metering - TDSP Information		Required	Start
	Unit Details		Required	Start
	Mapping Information		Required	Start
			Check Application Progre	ess

Site Details

- On the SODG List screen, click on Edit to open the Site Details summary screen
- Click on the **pencil icon** to open the data entry panel

ercot 😓	Interconnection Se	rvices				Hello, Donald House	My Account 😫 Log Out 🕪 Help 🕐
Site Code	List Site Details						
යි Home	Site Details						
SODG	Here's what we have s	o far. You can Edit what yo	u have already entered				Check Application Progress
	Site Name	Site Code	Unit Name	Unit Code	In-Service Date (Production Load Date)		 ✓
	lf you have no other in	formation to add, select D	one.				Done

ercot 5	Interconnection Services			Hello, Donald House	se Log Out 0+
Site Code	List Site Details				
ි Home SODG	Site Details RE Name MARLIN SOLAR LLC (RE) DUNS	The RE NAME and based on the RE s starting the appli	d DUNS are populated selected by the user when cation	Check Application Progress Save	and Back
	0801184113000 Site Name		For Site Name , use "_" inst	tead of spaces	
	Site Code Code cart be empty Unit Name Commencements empty		Site Code must be unique; are limited to 8 characters instead of spaces	Site Code and Unit Name each, and they allow "_"	
	Address				
	Street Address				
	City				
	City carit be empty				
	State Select ~ You can't leave this empty				
	Zip Zip can't be empty				
	County Select V You can't leave this empty				
	2003 Congestion Management Zone Select Vou cart leave this empty	Use the cale	ndar to select the requested	PLD,	
	Additional Site Information	which must a date at least	align with a scheduled model 30 days from the submissior	l load n date	
				Check Application Progress Save	e and Back

• Sample completed Site Details panel

ercot	Interconnection Services		Hello, Donald House Log Out (4	
	List Site Details			
(i) Home	Site Details			
sope				
SODG			Check Application Progress Save and Back	
	All fields are required unless marked optional			
	RE Name			
	MARLIN SULAR LLC (RE)			
	DUNS 0801184113000			
	Site Name			
	RIOO_SODG_TEST			
	Site Code			
	NEW_SODG			
	Unit Name	Unit Code will be populated		
	Unit Code: NEW SODG TEST1	as the concatenation of the		
	Address	Site Code and Unit Name		
	Street Address	Site code and Unit Name		
	7 Sun St.			
	City			
	Bastrop			
	State			
	TX ~			
	Zin			
	78602			
	County			
	Bastrop 🗸			
	2003 Congestion Management Zone		Click Save and Back to	
	South V			
	Additional Site Information		return to the Site Details	
	In-Service Date (Production Load Date)		summary screen	
	12-04-2024 × 💼			
			Check Application Progress Save and Back	

Site Code NEW_SODG	No SO is r	terconnection Services te that the DG Site Code now displayed Here's what we have so far. You can Edit	what you have already enter	ed		Click Edit to review the panel again or click Done to be taken back to the List screen	Hello, Donald House Log Out
		Site Name	Site Code	Unit Name	Unit Code	In-Service Date (Production Load Date)	
		RIOO_SODG_TEST	NEW_SODG	TEST1	NEW_SODG_TEST1	12-04-2024	🖍 Edit
		If you have no other information to add,	select Done.				Done

ercot 🦻	Interconnection Services		Hello, Donald House	Log Out 🕪
Site Code NEW_SODG	List Settlement Only Distribution Generator		Т.	
SODG Back	A green Edit button means that initial data validation is passed: no further		Required	Edit
	Metering - TDSP Information 	edits are required on this panel	Required	Start
			Required	Start
	Mapping Information		Required	Start
		Chu	eck Application Prog	Iress

Metering – TDSP Information

- On the SODG List screen, click on Start to open the Metering TDSP Information summary screen
- Click on + Add Metering Information to open the data entry panel

ercot 😓	Interconnection Services	Hello, Donald House Log Out 🕪
Site Code NEW_SODG	List Meters Metering TDSP Information	
SODG		Check Application Progress
	Use the + Add Metering Information to start	
	No data to display	
	+ Add Metering Information If you have no other information to add, select Done.	Done

ercot 😓	Interconnection Services		Hello, Donald House Log Out 64
Site Code NEW_SODG	List Meters Metering TDSP Information		
sood	All fields are required unless marked optional Is your substation owned by a NOIE? Vex No You cant leave this entry Is your generator behind a NOIE Settlement Meter Point? Vex No	If the SODG is behind a NOIE meter, the ESI ID is not needed	Check Application Progress Save and Back
	How many Primary EPS meters do you have? Who is the TDSP providing service to your site ? Search 7756P Resource ID (RID)	If adding a new EPS meter for this SODG, an EPS Metering Design Proposal must be submitted no less than 90 days before the meter cutover date, which must be on or before the PLD	
	ESI ID (Optional)		Check Application Progress Save and Back

• Sample completed Metering – TDSP Information panel

Site Code NEW, SODO (C) Home SODO All fields are required is your substation Yes No How many Primar 0 Who is the TDSP AEP TEXAS CE TDSP DUNS: 007 Beacure all (DED)	s g TDSP Information required unless marked optional ton owned by a NOE? Io		Check Application Progress Save and Back
U Who is the TDSP j AEP TEXAS OF TDSP DUNS: 007 Beequero I/ (PID)	tor behind a NOIE Settlement Meter Point? Io mary EPS meters do you have?	Based on the selections, the RF is notified that a TDSP	
Does your site har Ves No A TDBP Read F	SP providing service to your site ? CENTRAL.COMPANY (TDSP) Q 507924772 180) 18990001 2990001 ad Form is required with this SO00 request. 2990001222	Read Form is required (to be attached in a later step); if an ERCOT read meter were selected, the TDSP Read Form would <u>not</u> be required	Click Save and Back to return to the Metering – TDSP Information summary screen

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ercot	Interconnection Services		Hello, Donald House Log Out 🕪
Site Code NEW_SODG	List Meters Metering TDSP Information	Click on the pencil icon to review the panel again, click on Delete	
⇔ Home		to remove the metering info, or	Check Application Progress
	Here's what we have so far. You can cont what you have already entered Who is the TDSP providing service to your site ?	the List screen	
	AEP TEXAS CENTRAL COMPANY (TDSP) (DUNS: 007924772) Add Metering Information If you have no other information to add, select Done.		Done

ercot 🦻	Interconnection Services		Hello, Donald House	Log Out 🕪
Site Code NEW_SODG ☆ Home	List Settlement Only Distribution Generator			
SODG	Site Details	A green Edit button means that initial	Required	Edit
Back	Metering - TDSP Information	data validation is passed; no further	Required	Edit
	Unit Details	edits are required on this panel	Required	Start
	Mapping Information		Required	Start
		c	heck Application Proc	gress

Unit Details

- On the SODG List screen, click on **Start** to open the Unit Details summary screen
- Click on the **pencil icon** to open the data entry panel

Site Code NEW_SODG	Interconnection Ser	Interconnection Services List Unit Details Unit Details Unit Name is pre-populated from info provided on the Site Details panel		Hello, Donald House Log Out (# Check Application Progress	
	Unit Name TEST1	Technology Type	Physical Unit Type	Name Plate Rating MW	
	If you have no other inf	ormation to add, select Done.			Done

ercot	Interconnection Services	see Log Out (4	•
Site Code	List Unit Details	If W – Wind is selected as the Technology Type,	
NEW_SODG	Unit Details	another row will annear for the user to enter the	
යි Home		Number of Turkings	-
SODG		NUMBER OT LUBINES	
	All fields are required unless marked optional	Technology Type	
	Unit Information	W - Wind 🗸	
	Technology Type Select		
	You can't leave this empty	Number of Turbines	
	Rhupical Light Tura		
	Select v	You can't loave this empty	
	You can't leave this empty	rou cancieave uns empty	
	Name Plate Rating		
	MW		
	TOU Can't reave this empty	MW rating (min = 0.1, max = 10); MVA rating	
	You capit lows this earthy	must be greater than or equal to the MW rating	
	Renewable	must be greater than or equal to the www rating	
	Is your generator a renewable energy resource?		
	You can't leave this empty	If Ves is selected for to your generator a renewable	
	Fuel Information	in tes is selected for is your generator a renewable	
	Primary Fuel Type Select V	energy resource?, another row will appear for the	
	You can't leave this empty	user to select either a renewable credit generator	
	Secondary FuelType (Optional)	(RN) or a renewable offset (OS)	
	Select V	(int) of a renewable offset (05)	
	Capario Information		
1	Generic Fuel Category	Renewable	
	Select V	Is your generator a renewable energy resource?	
	You can't leave this empty	● Yes 🔿 No	
	Generic Start-up / Operating Category	Is it a renewable credit generator(RN) or a renewable offset(OS)?	
	Select Vou cart leave this empty		
		You can't leave this empty	
		Chapt Application Provent Date	-
		Check Application Progress Save and Back	

• Sample completed Unit Details panel

arcat 5	Interconnection Services	Hello, Donald House Log Out 6+
CILULY	List Unit Details	
Site Code NEW_SODG		
යි Home	Unit Details	
SODG		Check Application Progress Save and Back
	All fields are required unless marked optional	
	Unit Information	
	Technology Type	
	S - Solar V	
	Physical Unit Type PV - Photovoltaic	
	Name Plate Rating	
	5.5 MW	
	5.5 MVA	
	Renewable	
	Is your generator a renewable energy resource?	
	is it a renewable credit generator(kw) or a renewable offset(US) /	
	Fuel Information	
	Primary Fuel Type	
	SUN - Solar (photovoltaic, thermail)	
	Secondary FuelType (Optional)	
	NA - Not Applicable V	
	Con avia Information	
	Generic Information	Click Save and Back to
	Solar V	
		return to the Unit Details
	Generic Start-up / Operating Category	summary screen
	kenewape (including Hypro)	
		Check Application Progress Save and Back

ercot	Interconnection Ser	vices			Hello, Donald House Log Out 🕪	
Site Code NEW_SODG ଭା Home SODG	List <u>Unit Details</u> Unit Details			Click on the pencil icon to review the panel again or click Done to	Check Application Progress	
	Here's what we have so far. You can Edit what you have already entered			be taken back to the		
	Unit Name	Technology Type	Physical Unit Type	List screen		
	TEST1	Solar	Photovoltaic		 Image: A set of the /li>	
	If you have no other info	prmation to add, select Done.			Done	

ercot 🔄	Interconnection Services		Hello, Donald House	Log Out 🕪
Site Code NEW_SODG	List Settlement Only Distribution Generator			
SODG	Site Details		Required	Edit
Back	Metering - TDSP Information	A green Edit button means that initial	Required	Edit
	Unit Details	data validation is passed; no further	Required	Edit
	Mapping Information	edits are required on this panel	Required	Start
		c	heck Application Prog	gress

Mapping Information

- On the SODG List screen, click on **Start** to open the Mapping Information summary screen
- Click on the **pencil icon** to open the data entry panel

CFCOT	Interconnection Services					Hello, Donald House	Log Out 🕪
යි Home SODG	Here's what we have so far. You can Edit v	vhat you have already entered				Check Application P	rogress
	Substation Code for PCD	Substation Name	Transmission Bus POD – PTI Bus #	Voltage	NMMS Load Name		one

ercot	Interconnection Services	Hello, Donald House Log Out 60
ercot ନ site code NEW_SODG ଜ Home	List Mapping Information Mapping Information All fields are required unless marked optional	Check Application Progress Save and Back
	Point of Delivery Substation Code for POD Substation Code for POD cart be empty Substation Name for POD: Transmission Substation Transmission Substation Transmission Substation Transmission Substation Vibrage Vibrage KV Voltage cart be empty Load Name in Network Operations Model Field cart be empty	The associated Substation Name for POD will be populated after the Substation Code for POD is entered; contact the Demand Integration team if the requested substation is not found

• Sample completed Mapping Information panel

ercot 5	Interconnection Services	Hello, Donald House Log Out 🕪
Site Code NEW_SODG	List Mapping Information	
යි Home	Mapping information	
SODG	All fields are required unless marked optional Point of Delivery	Check Application Progress Save and Back
	Substation Code for POD	
	Substation Name for POD: LOST PINES	
	Transmission Substation Transmission Bus POD ~ PTI Bus # 170773 Voltage 18 KV Load Name in Network Operations Model AUXBD1	Click Save and Back to return to the Mapping Information summary screen
		Check Application Progress Save and Back

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ercot 😓	Interconnection Services				Hello, Donald House Log Out 🕪
Site Code NEW_SODG ଭ Home SODG	List Mapping Information Mapping Information Here's what we have so far. You can Edit what you have already entered			Click on the pencil icon to review the panel again or click Done to	Check Application Progress
				be taken back to the	
	Substation Code for POD	Substation Name	Transmission Bus POD \sim PTI Bus #	List screen	
	LOSTPI	LOST PINES	170173	List screen	
	If you have no other information to add	select Done .			Done

ercnt 😓	Interconnection Services		Hello, Donald House	Log Out 🕒
Site Code NEW_SODG	List Settlement Only Distribution Generator			
SODG	Site Details		Required	Edit
Back	Metering - TDSP Information	A green Edit button means that initial	Required	Edit
	Unit Details Mapping Information	data validation is passed: no further	Required	Edit
		edits are required on this panel	Required	Edit
		Ct	neck Application Prog	ress

Check Application Progress

On the SODG List screen, click on Check Application Progress to open the Review Project Details summary screen

ercot 😓	Interconnection Services	Hello, Donald House	Log Out 🕒
Site Code NEW_SODG	List Settlement Only Distribution Generator		
SODG	Site Details	Required	Edit
Back	Metering - TDSP Information	Required	Edit
	Unit Details	Required	Edit
	Mapping Information	Required	Edit
		Check Application Prog	gress

- On the Review Project Details screen, all data submission panels are listed
 - o Click on Revisit to return to any of the data entry panels
 - Make Corrections in red indicates that the panel is either missing required information or that something needs to be corrected
 - Any needed corrections will also cause Edit to appear in a red box
 - Edit in a green box indicates that all panels have been completed but the user has the option to go back to any panel to make revisions
 - Clicking on **Download SODG Data** will download an excel file with a separate tab containing the information added to each data entry panel
 - Clicking on **Submit** will save the request and move the user to the final requirements which must be completed before the submission is sent to ERCOT
 - Attachments
 - E-sign
 - Payment

ercot 🦻	Interconnection Services				Hello, Donald House	Log Out 🕪
Site Code NEW_SODG		Review Project Details				
습 Home						
SODG		Sodg	_	Edit		
		Site Details	Revisit	<u> </u>		
		Metering - TDSP Information	Revisit			
		Unit Details	Revisit			
		Mapping Information	Revisit			
				Download SODG Data		

- When the data entry is complete, click **Submit** on the Review Project Details screen to move on to the final requirements
 - If you are taken back to the Interconnection Request List, click on Finish to view the Finish Your SODG Request screen

ercot by Your Interconnection Requests							Hello, Di	onald House My Account	💄 Log Out 🕞
Interconnection Request List	The pop	INR Numbe	er is		The current status is Sav	ved		Start Ne	ew Request ~
Show 10 V Showing 1 to 1 of 1 entries					_	Filter List By All Typ	Search Save	d Q	Reset All
Alert Actions	Number 24SOG0749	Project Name	Primary Name Donald House	Company MARLIN SOLAR LI	C (RE)			Last Updated 10-28-2024	\$

ercat学 Finish Your SODG Request			Hello, Donald House My Account 💄 Log Out 🚱
The INR can still be canceled by clicking on Delete INR ; the user must confirm this selection to continue with the deletion (can't be canceled after ERCOT changes status to In Review)	ADD RECOURSE 245OC 0749 SODD Detail Wu ve akready worked on this section. You can review or trake changes 	Attachments, if needed E-sign must be complet before the user can acc the payment screen and finish the submission	, and ed ess d
Are you sure? You won't be able to revert this! Yes, delete this INR No, do not Delete	E-sign You need to upload TDSP Gen Read form(s) before you can start this section Let's get Started Payment You need to complete your e-sign before you can start this section Ready to Pay	Clin Da ret Int Ret	ck on Back to shboard to surn to the erconnection quest List

Attachments

- On the Finish Your SODG Request screen, click on **Review/Changes** in the Attachments box to open the Attachments panel
 - o If an attachment is not needed, move on to the **E-sign** panel

SOG REQUEST 24SOG0749	
SODG Details	
You've already worked on this section. You can review information or make changes	
Review / Edit	
Attachments	
You need to upload TDSP Read Form(s) with this SODG request.	
Review / Changes	
E-sign	
You need to upload TDSP Gen Read form(s) before you can start this section	
Let's get Started	
Payment	
Payment You need to complete your e-sign before you can start this section	

ercot 券 Finish Your SODG Request		Hello, Donald House My Account 👗 i Log Dut 🤇
Attachments - what ar • A TDSP Read Generation FC	e the required attachments for your project	Select the TDSP Gen Read Form file type from the drop- down list and then click on
Attachments The message lets the user know that a TDSP		Choose File to browse to the file to be attached
Read Generation Form is required for this SODG		Select file type 🗸 🕇 Choose File

- Sample attached TDSP Read Generation Form
 - \circ Note that the start date for the TDSP meter data must match the requested PLD for the SODG

ercot ♀ Finish Your SODG Request						Hello, Donald House	My Account 🚢 Log Out 🕞
	Attachments - what are the required attachmen • ATDSP Read Generation Form Attachments	ts for your project			Ø∧2 ²		
	File Name TEST_ERCOT_TDSPReadGeneration_Form_v6.1.pdf	 Type TDSP Gen Read Form 	 User Donald House 	Attached On 10-28-2024	≑ ≣ Delete		
		Click Continue to on to the E-sign s	move creen	TDSP Gen Read	Form V + Choose File hs:.7z, doc,.docx,.pdf, zip		
	Back Delete INR			J	Continue		

ercot Finish Your SODG Request		Hello, Donald House	My Account 🚨 Log Out 🕞
	SOG REQUEST 24SOG0749		
	SODG Details You've already worked on this section. You can review information or make changes Review / Edit		
	Attachments You've already provided attachments. You can review attachments or make changes. Review / Changes		
	E-sign You haven't entered any information yet. Let's get started! Let's get Started		
	Payment You need to complete your e-sign before you can start this section Ready to Pay		
Detete INR		Back to Dashboard	

E-sign

- On the Finish Your SODG Request screen, click on Let's get Started in the E-sign box to open the E-sign panel
- ERCOT Planning Guide Section 8 Attachment D: Attestation Regarding Compliance with the Lone Star Infrastructure Protection Act is built into RIOO and must be completed by the RE as part of the submission

ercot 🖗 Finish Your SODG Request			Hello, Donald House 🛛 My Account 🚔 i Log Out 🕞
ercot Sp Finish Your SODG Request C→ Home Interconnection The user must select an answer and provide a name and title to activate the Continue button	Substation Details Attachments Edgn Invice Payment ATCESTATION RECARDING COMPLIANCE WITH THE Lone Star Infrastructure Protection Act Interconnecting or Resource Entity: MARLIN SOLAR LLC (RE) Interconnection Request (INR) number Interconnection Request (INR) number Interconnection Statements on PARAGRAPHS (A) - (G) ARE TRUE Interconnection Request (INR) number Interconnection of the FOLLOWING STATEMENTS IN PARAGRAPHS (A) - (G) ARE TRUE If A, B, or C is selected, further review will be needed by ERCCOT Legal to determine in the SODDG can be registered by this entity of the SODDG can be registered by this entity of the SODDG can be registered by this entity of the SODDG can be registered by this entity of the second and the stateston thal have the same meaning as the definition of the term in Texas balances and Commerce Code. Section 113 001(d), didded by A	24S060749 he above referenced IE/RE's project ned by: North Korea, Russia, or a d filiate of the above reference f North Korea, Russia, or a d or China, Iran, North Kore tel June 18. 2221, 87% Leg, R.S. Ch. 975 (8.8	<page-header><page-header></page-header></page-header>
	Name (Required) Type Authorized Signature Date 10-28-2024 Type Authorized Tabe Type Authorized Tabe Units Create Httl Detecte Httl	The Signat is pre-popu with the cu	ure Date ulated urrent day

• Sample completed E-sign form

<i>ercot</i> ♀ Finish You	r SODG Request		Hello, Donald House	My Account 🚢 Log Out 🕞			
යි Home	Interconnection	Substation Details Attachments Esign invoice Payment					
		ATTESTATION REGARDING COMPLIANCE WITH THE Lone Star Infrastructure Protection Act					
		Interconnecting or Resource Entity: MARLIN SOLAR LLC (RE) IE/RE's Interconnection Request (INR) number: 245060749					
		Check the option that applies:					
		1. With respect to the above referenced IE/RE and INR number and with respect to each Entity with an ownership interest in the real property to be utilized by the above referenced IE/RE's project ("Property Owner hereby attest that:), I				
		NONE OF THE FOLLOWING STATEMENTS IN PARAGRAPHS (A) - (C) ARE TRUE.					
		O ONE OR MORE OF THE FOLLOWING STATEMENTS IN PARAGRAPHS (A) - (C) ARE TRUE					
		A) The IE/RE or Property Owner, or a wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of the IE/RE or Property Owner, is owned by:					
		(i) individuals who are citizens of China, Iran, North Korea, Russia, or a designated country: ¹ or					
		(ii) a company or other entity, including a governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of China, Iran, North Korea, Russia, or a designated country	; or				
		8) The majority of stock or other ownership interest of the IE/RE or Property Owner, or a wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of the above referenced IE/RE or Property Owner is held or controlled by:					
		(i) individuals who are citizens of China, Iran, North Korea, Russia, or a designated country; or					
		(ii) a company or other entity, including a governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of China, Iran, North Korea, Russia, or a designated country	; or				
		C) The IE/RE or Property Owner, or a wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of the IE/RE or Property Owner is headquartered in China, Iran, North Korea, Russia, or a de country.	signated				
	¹ The term "designated country" as used in this attentation shall have the same meaning as the definition of that term in Texas Business and Commerce Code, Section 113.001(4), added by Act of June 18, 2021, 87h Leg. R.S. Ch. 975 (5.B. 2116).						
		By inserting my name below, I certify that I am an officer, executive, or authorized employee with authority to bind the IA listed above, that I am authorized to execute and se listed above, and that the statements contained herein are true and correct.	ue to move	e			
		Name (Required) Signature Date On to the Inv	voice and				
		Donald House 10-28-2024					
		Title (Required) Payment scr	eens				
		Authorized Representative					
		Back Delete INP	ntinue				

Invoice and Payment

- Based on the current <u>ERCOT Fee Schedule</u>, REs will be charged \$2,300 for each new SODG to be added to the ERCOT Network Model
- This fee must be paid in RIOO to complete the SODG submission
- Refunds of fees paid will not be considered unless ERCOT directs a change in the registration process that results in additional fees being charged
- Sample invoice

ercat§ Finish Your SODG Request	Substation Details Attachments	Esign Invoice Payment The the the DUE		Invoice Dat current day, payment is a TODAY	e is and always	The INR Re No. is liste the invoice Request No. 24SOG0749		equest d on e	Wy Account 🛓 i Log Dut 🚱
	NEW_SODG			INVOICE DATE October 28, 202	24	:	DUE TODAY \$2,300.00		
	DESCRIPTION				•	PRICE	¢2.200.00		
	Settlement only Distribution Gene	Click Continue	to Pay	ment to	TOTAL DUE:		\$2,300.00		
	Back	move on to the Paym		ent screen		Print In	voic Continue to Payment		

• Sample payment screen using credit card

<i>ercot</i>	equest			Hello, Donald House My Account 🚢 Log Out
슈 Home 🖵 Inte	erconnection Substation Details Attachments Esign	Invoice Payment		
	The SODG INR number is listed as the Invoice Number	Order Summary Decopion Interconnection Studies performed	Total \$	2300.00
	User selects to make payment with a Credit Card	Card Number Card Number Card Number Billing Address Frst Name	Bank Account (USA Only) Exp. Date • Card	Code
	The user's Email is pre-populated	USA USA Table State	Zip City Phone Number	After card and billing info is entered, click Pay to complete the transaction and view the payment confirmation

• Sample payment screen using bank account

ercot by Finish Your SODG Request		Hello, Donald House 🛛 My Account 👗 Log Out 🚱
슈 Home Details Attachments Esign	Invoice Payment	
The SODG INR number is listed as the Invoice Number	Order Summary Description Indeconnection Unclose Number 2400074P Credit Card Bank Name Account Number * Personal Checking Billing Address Eigt Name Last Name Last Name Last Name Last Name	User selects to make payment with a Bank Account
	USA Zip Street Address City	After bank and billing info is entered, click Pay to complete the
The user's Email is pre-populated	State Phone Number	transaction and view the payment confirmation

• Sample payment confirmation

<i>ercot</i> ♀ Finish Ye	our SODG Request			Hello, Donald House	My Account 💄 I	Log Out 🕞
合 Home	Interconnection Substation Details Attachme	The SODG IN	R			
	Thank you for your payment	number is list on the payme confirmation	ted ent			
	Your project's interconnection Request Number is: 245060749 Access your innerconnection Request Los anytime to view your project's star		Click Back to Interconnection List to return to your Interconnection Request List			

- Back on the Interconnection Request List, the user can view the newly submitted SODG request
 - The status has changed to INR submitted to ERCOT

<i>ercot</i> Ҿ Your I	nterconnection Requests						Hello, Donald House	My Account 💄	l Log Out 🕞
슈 Home	Interconnection					The status is now INR			
Interconne	ection Request Lis	t				submitted to ERCOT		Start New F	Request *
Show 10 v S	howing 1 to 1 of 1 entries					Filter List By All Types	✓ Search 24S0G0749	٩	Reset All
Alert	Actions	Number	Project Name	Primary Name	Company	⇔ Status	≑ Last	Updated	\$
	Continue	24SOG0749		Donald House	MARLIN SOLAR LLC	(RE) INR submitted to ERCOT	10-2	8-2024	

After submitting INR

INR status

The INR submitter will receive automated emails from ERCOT with status updates as the request moves through the modeling process as well as any requests for revisions to the INR. The user can also view status changes on the Interconnection Request List.

- Status updates for a submitted INR include:
 - INR submitted to ERCOT
 - The user can still update the submission when in this status
 - o In Review
 - ERCOT changes to this status after completing an initial review of the submission
 - User can't make updates when the INR is in this status
 - If updates are required, ERCOT will change the status to **Incomplete** to allow the user to make changes and resubmit (ERCOT will email the user to identify the needed updates)
 - The INR status will stay as In Review until it is approved for the model load
 - $\circ~$ Approved for Production
 - ERCOT changes to this status after the modeling request has been fully tested and approved for the requested model load snapshot (usually 2-3 weeks before the PLD)
 - \circ In Production
 - INR will change to this status on the PLD

Confirming new SODG in production Network Model

After the PLD for the newly created SODG, the INR submitter is encouraged to verify that the SODG data is viewable in the RIOO Resource Services (RIOO – RS) part of the application. The user should also verify that the new SODG is included in the real-time settlements for the associated QSE. ERCOT will verify that the SODG is in the production Network Model, but it is the responsibility of the RE/QSE to notify ERCOT if they notice a settlements issue for the SODG. Real-Time SCED prices for SODGs and SOTGs are posted in the two files listed below under "Real-Time Prices Reports" on the <u>Real-Time Market webpage</u>. Prices for a new SODG will be included in these reports starting on the PLD.

- LMP By SOG Including Price Adders (prices for each SCED interval)
- <u>Real-Time Price for SOG</u> (prices for each 15-minute Settlement Interval)

Updating an existing SODG

To update an existing SODG, the RE must use the RIOO Resource Services application (RIOO – RS), which is accessed using the same RIOO user account. Refer to the **RIOO User Guide – Updating an Existing SODG** on the <u>Distributed Generation webpage</u> for details.

ercot ₽	RIOO	Hello, Donald House My Account &
A Home		
	Solution Services	Resource Services
	• Update or add registration data	update or view your existing resource data.
	Co to Interconnection Services - IS	SODC Constation Load Resource

Troubleshooting RIOO issues

User account

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

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

Problems viewing data or completing submissions

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

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

Reporting issues

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