



RIOO User Guide – Updating an Existing SODG

Version 3.0
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ERCOT RIOO Resource Services

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

About this guide

This guide provides information about performing the tasks in RIOO – RS to create and submit the CR that proposes updates to an existing SODG in 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 is required to register with ERCOT as an SODG. REs register SODGs using the [Resource Integration & Ongoing Operations \(RIOO\)](#) application. Instructions for setting up a RIOO user account can be found under RIOO Documentation on the [Resource Integration webpage](#). The SODG registration process allows for energy injections to a TDSP's Distribution System to be accounted for in ERCOT market settlements. Energy from registered SODG units 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 is not allowed.

Note that this guide 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 [Resource Integration webpage](#). Questions on these registrations should be sent to the ERCOT Resource Integration team (ResourceIntegrationDepartment@ercot.com).

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Before starting your Change Request

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

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

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

Have documents completed and ready to attach

- If the SODG will be using a meter read by a TDSP, a [TDSP Read Generation Metering Registration Form](#) may be required with the CR submission. If the CR is changing any of the data included on the TDSP Read Form, or if the SODG will now be using a TDSP-read meter for the first time, then the RE must request that the host TDSP completes the form and the RE must attach it to the RIOO submission. If the CR does not impact the metering information, then the user does not need to attach the TDSP Read Form.
- If the SODG will be using an ERCOT Polled Settlement (EPS) meter, then the TDSP Read Generation Metering Registration Form is not needed.

Coordinate a Production Load Date (PLD)

When creating a CR for an existing 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.

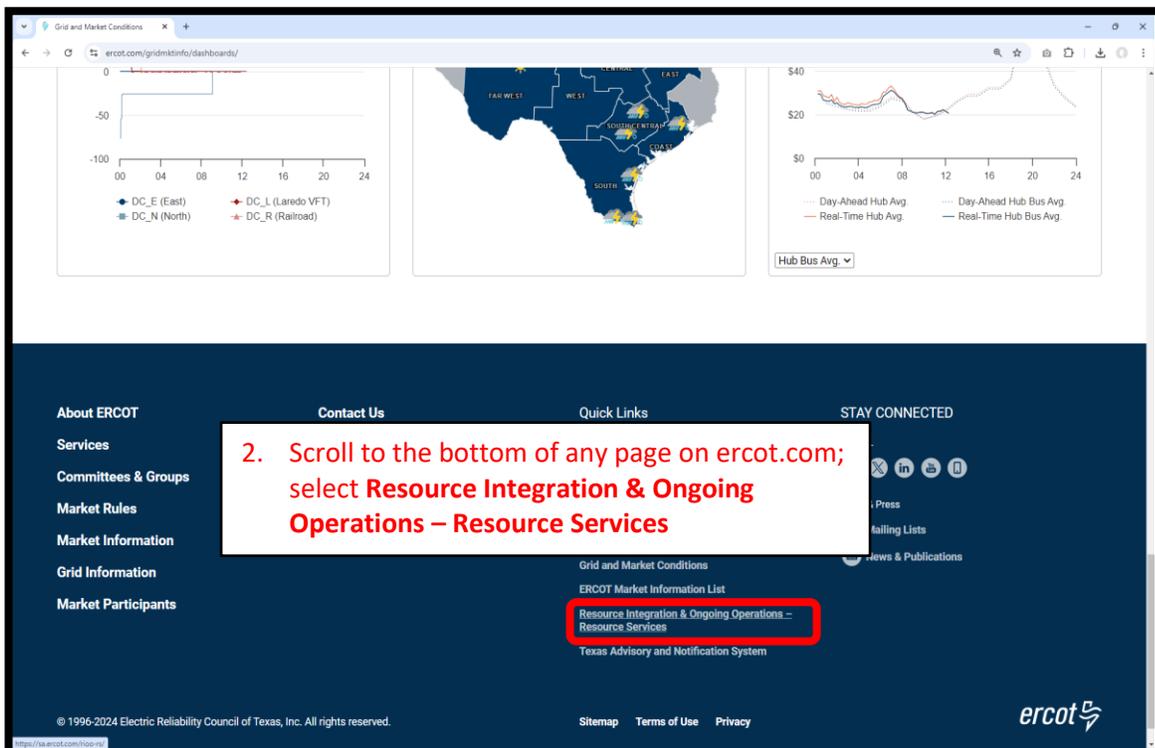
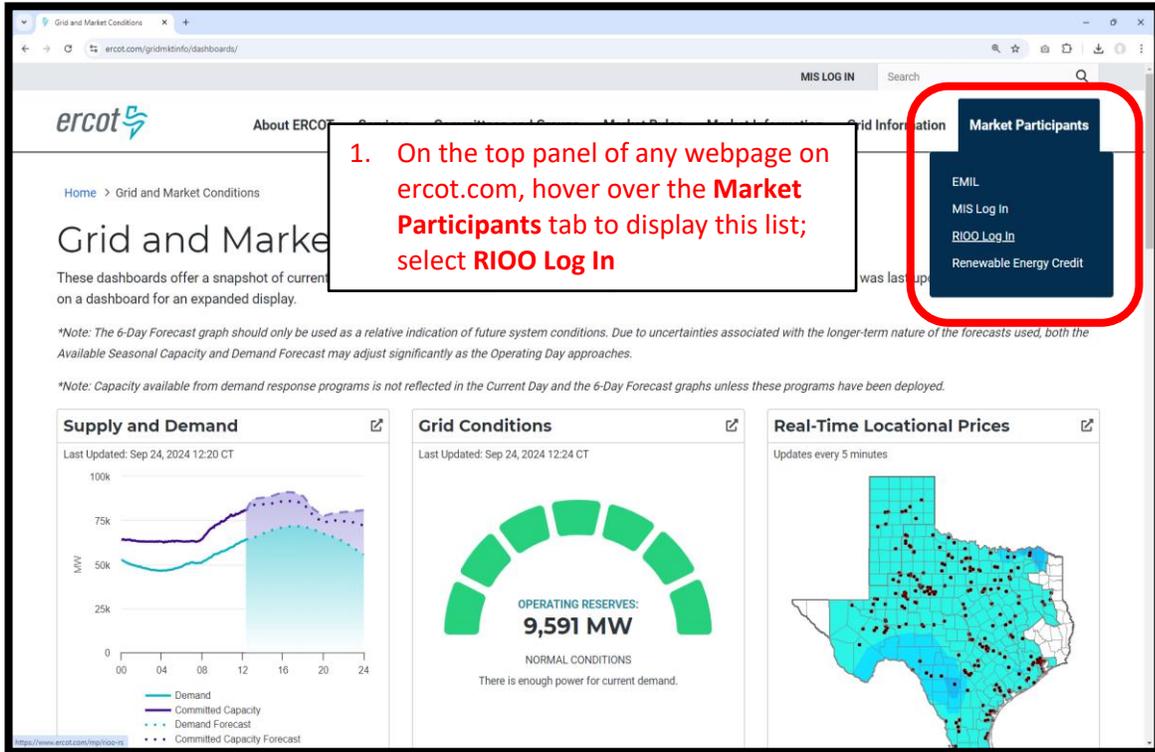
- The PLD must align with a scheduled production model load as listed on the current [Production Load Schedule](#).
- The PLD will be at least 30 days after the RIOO registration submission is accurately completed.
- The RIOO application will indicate that if the requested PLD is fewer than 90 days out,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

Important notes on Change Requests

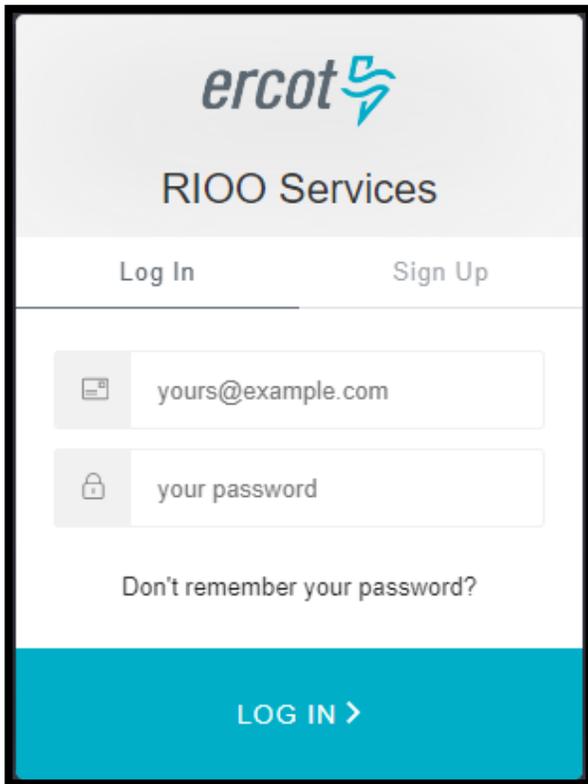
- Once a CR is submitted for an SODG, no other CRs can be submitted for that same SODG until the in-progress CR is effective in the production Network Model. This restriction is to prevent conflicting changes that couldn't be properly validated against an unknown model state.
- When a CR is submitted to stop an SODG, no other CRs can be submitted for that same SODG. See further details on [Stopping an existing SODG](#) in this guide.
- Based on the current [ERCOT Fee Schedule](#), these are the potential fees to be charged for submitting a CR for an SODG:
 - Fee to register a new SODG = \$2,300 (only done in RIOO – IS)
 - Fee to update an existing SODG:
 - \$2,300 if the SODG name plate rating is increased by 1 MW or more, accumulated over a rolling 12-month period
 - No fee for other updates
- No fee to stop an existing SODG or to change the owner (RE) for an SODG
- All fees are collected in RIOO during the submission process and must be paid before the submission can be completed
- ***Refunds of fees paid will not be considered unless ERCOT directs a change in the registration process that results in additional fees being charged***

Logging into RIOO

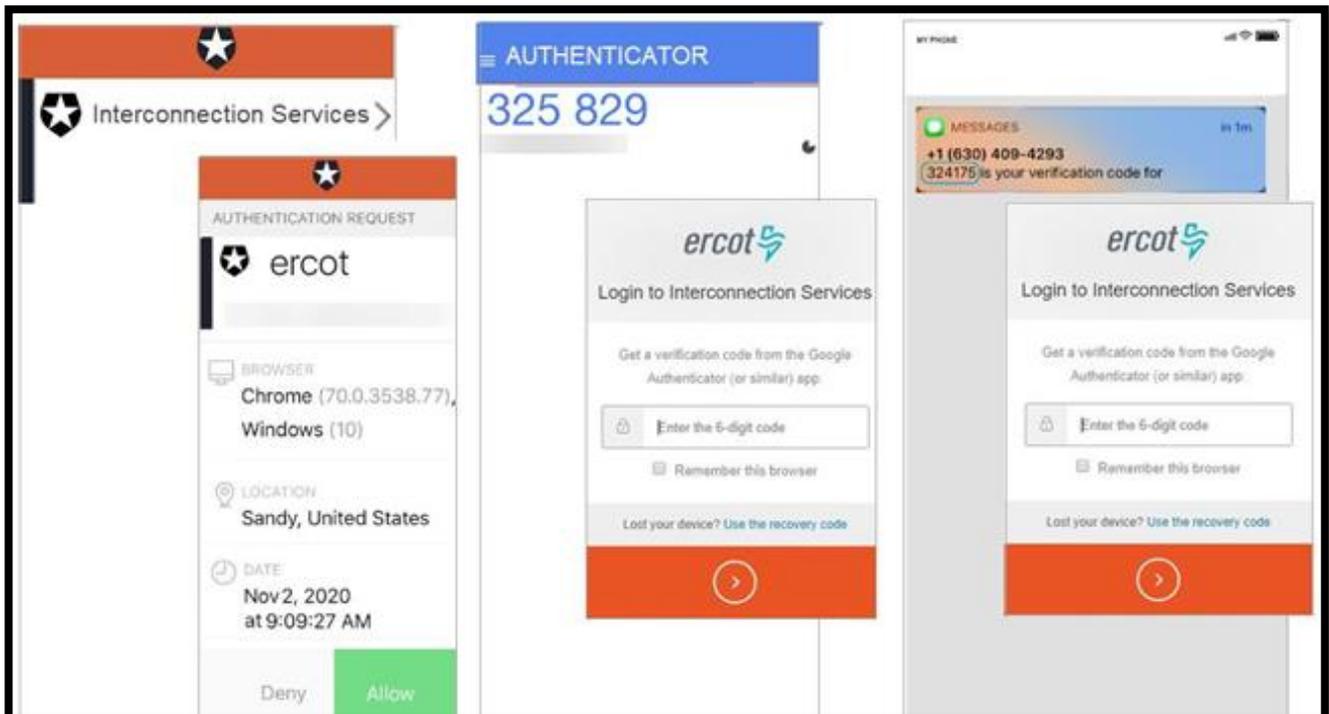
- There are two ways to access the RIOO application login screen. After a successful login, any of the RIOO application panels can be bookmarked for more direct access.



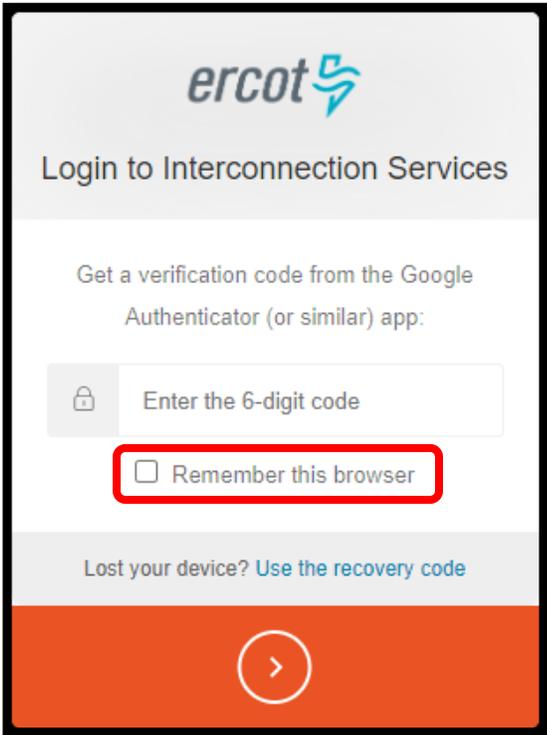
- Log into your RIOO account:



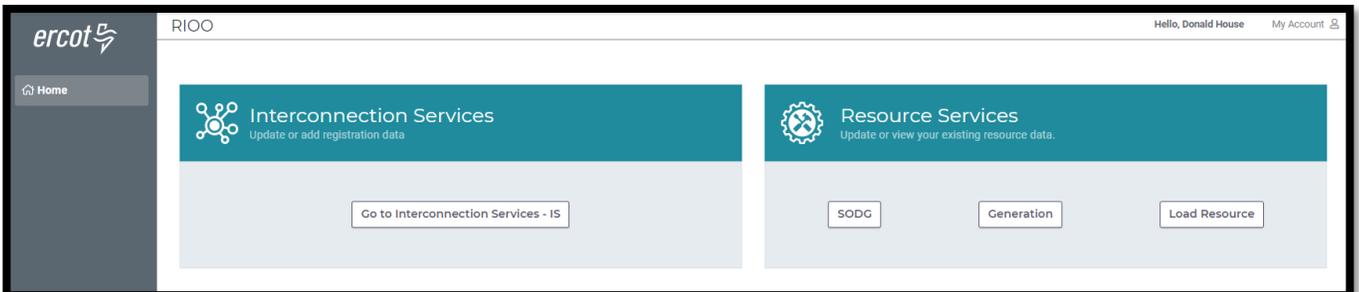
- You'll be prompted to enter a 6-digit code to complete the multi-factor authenticator (MFA). The MFA code will be sent to the app selected when setting up your account (Auth0 Guardian, Google Authenticator, SMS Text Authentication, or another authentication program that you chose to use).



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

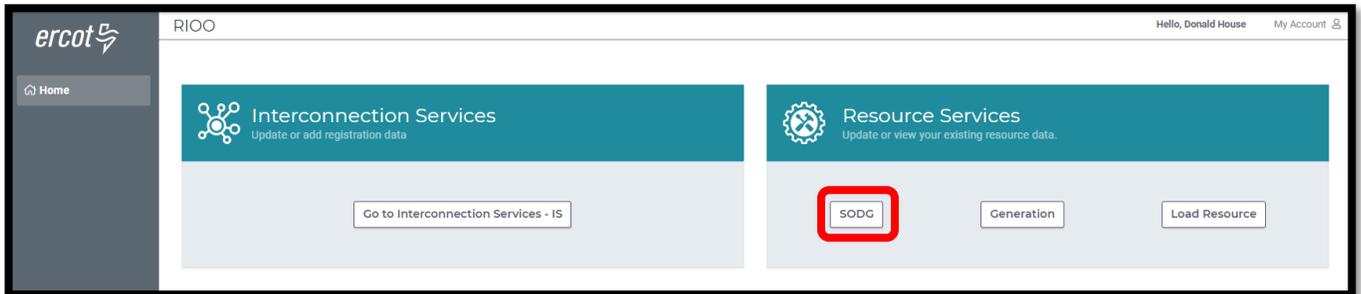


- After successfully logging in, you'll be taken to the RIOO home screen:

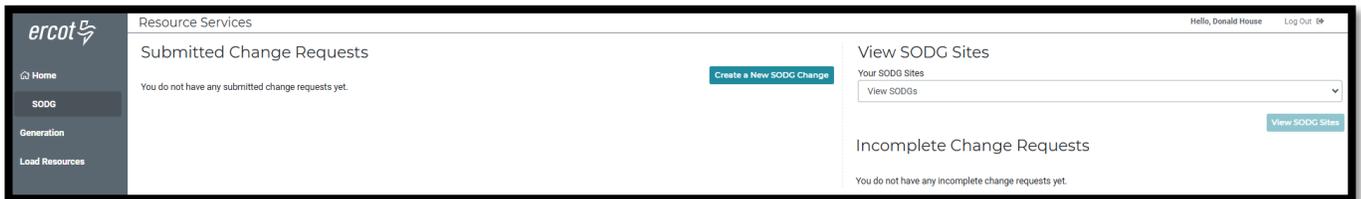


Overview of RIOO Resource Services

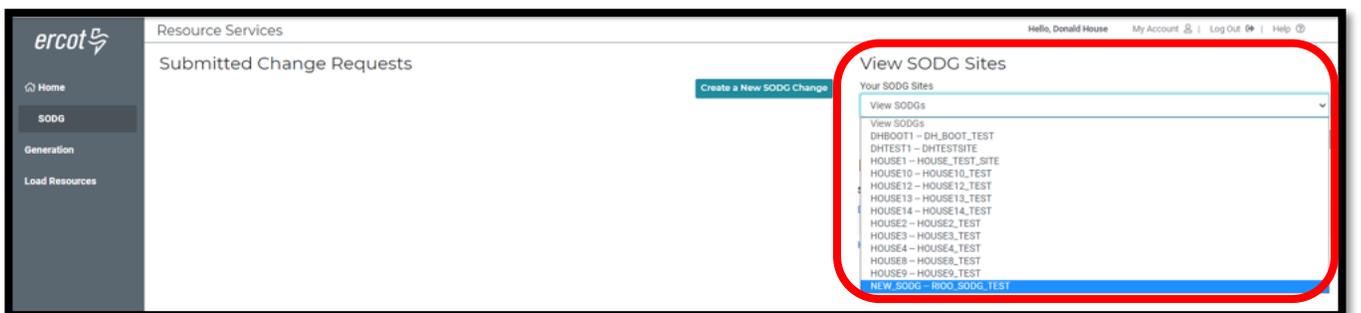
- On the RIOO home screen, open Resource Services by clicking on the **SODG** button
 - Resource Services is used to update an existing SODG
 - Interconnection Services is used to create a new SODG
 - See [RIOO User Guide – Creating a New SODG](#) on the [Distributed Generation webpage](#) for details



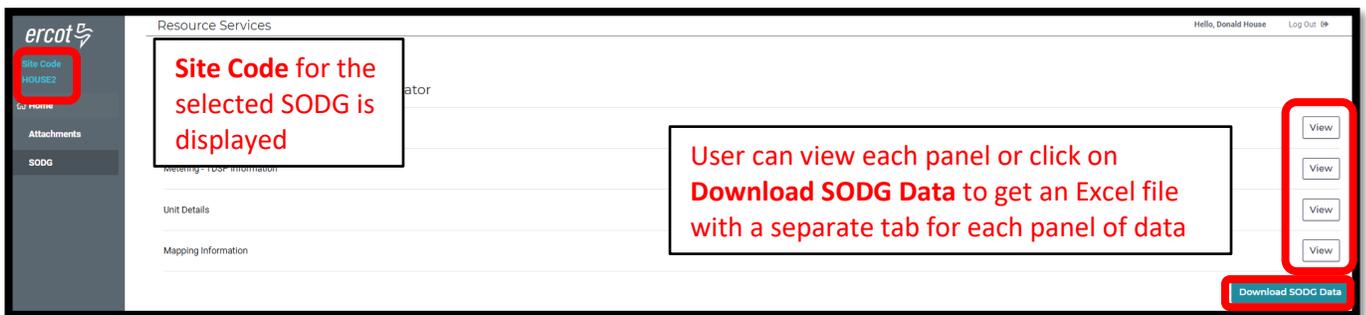
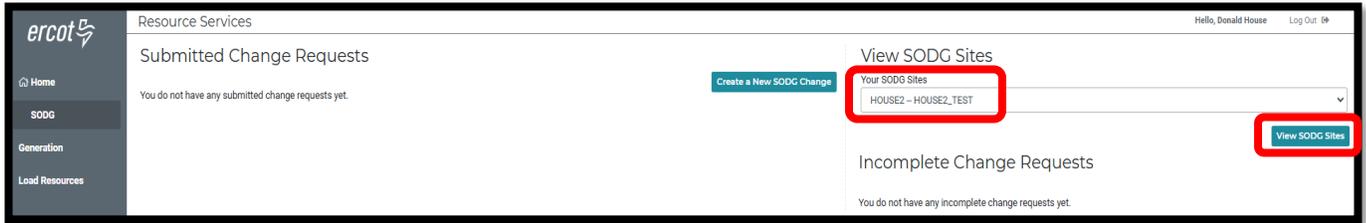
- The change request dashboard is displayed



- The dashboard allows the user to view their existing SODGs and their current CRs
 - View all existing SODGs associated with the Resource Entities represented by the user in the dropdown list under **Your SODG Sites**
 - **Users are highly encouraged to verify their existing SODG data periodically, especially after a CR is processed and updated in the Network Model**



- If the user selects one of the SODGs, and then clicks on **View SODG sites**, the user can view all existing registration data for that SODG



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

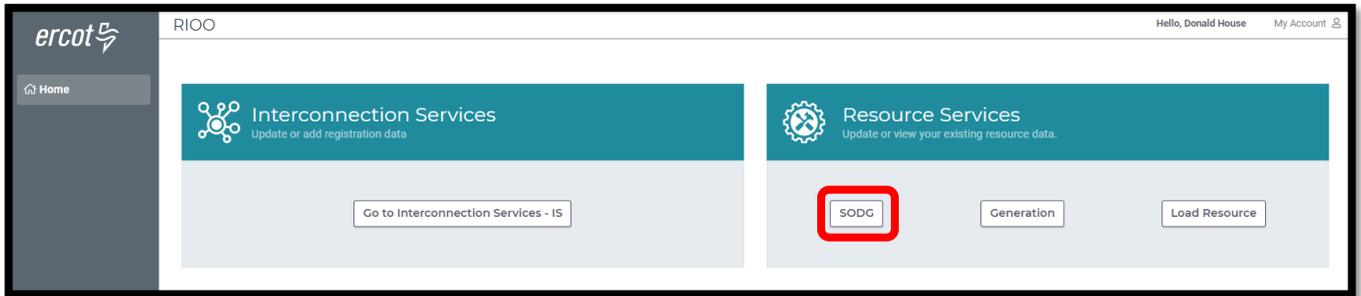


- The user can also view CRs that have been started but not yet submitted to ERCOT
- The user can click on Finish Change Request to open and continue the CR



Change request for an existing SODG

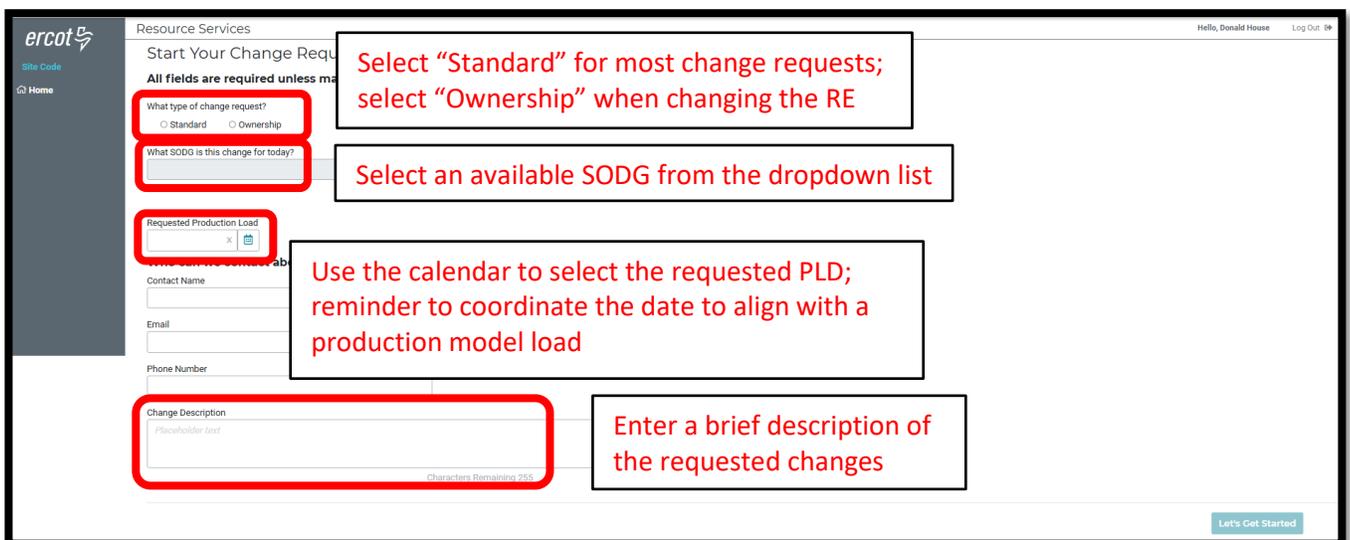
- On the RIOO home screen, open Resource Services by clicking on the **SODG** button



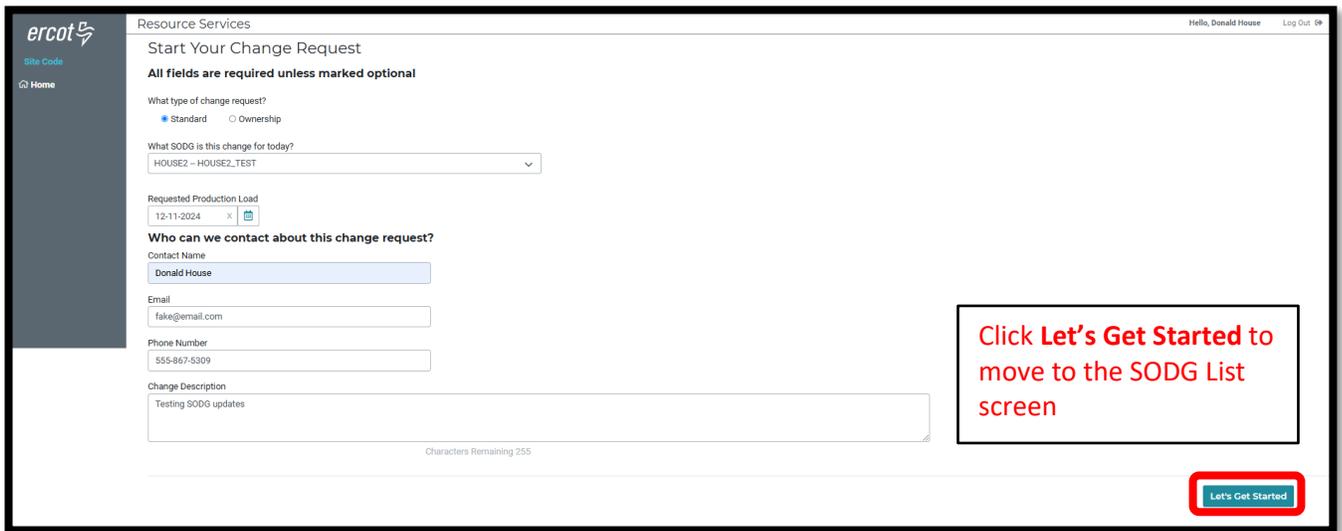
- On the change request dashboard, click on **Create a New SODG Change**



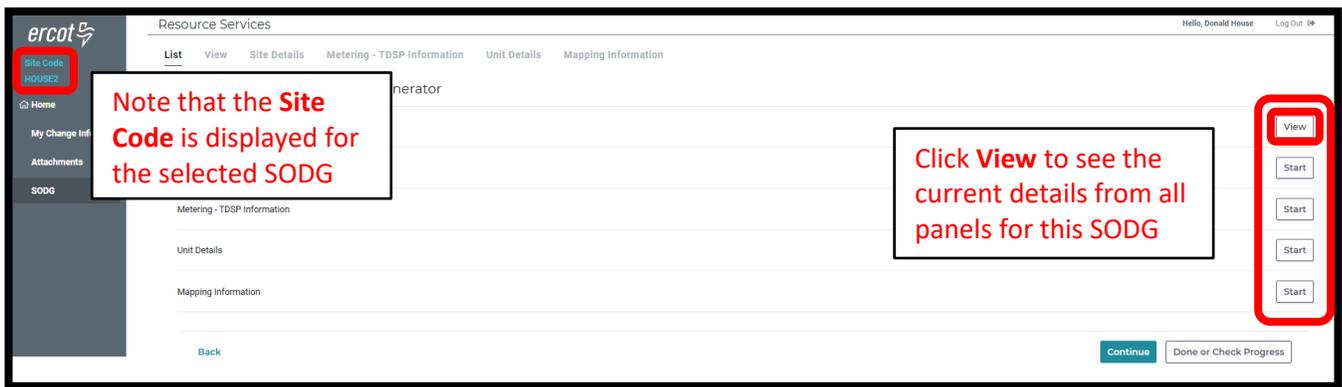
- Select which SODG to update from the **What SODG is this change for today?** drop-down list
 - Note that the user will see a list of all SODGs associated with the REs represented by the user that are currently in the ERCOT Network Model
- Enter the contact information and a brief description of the requested changes



- Sample completed Start Your Change Request panel



- On the SODG List screen, all data submission panels are listed along with a View panel to see all data at once
 - Start indicates that nothing has been updated on that panel
 - Edit in red indicates that the panel is either missing required information or that something needs to be corrected
 - Edit in green indicates that the panel has been completed but the user has the option to go back to the panel to make revisions
 - Clicking on Edit or Start will open that panel for data entry



- The user only needs to open the panels for which updates will be submitted
 - ***This guide will provide one example of an update; there are too many possible scenarios to capture all of them or to determine which examples would be the most helpful***
 - The same data validation rules will be applied as they are when a new SODG is created
 - Any questions or issues with specific updates can be directed to the ERCOT Demand Integration team (ERCOTLRandSODG@ercot.com) for assistance
 - Progress can be saved, allowing the user to return to the application later to finish the submission

- Remember that there are potential fees based on the changes submitted in the CR
 - Fee to update an existing SODG:
 - \$2,300 if the SODG name plate rating is increased by 1 MW or more, accumulated over a rolling 12-month period
 - No fee for other updates
 - No fee to stop an existing SODG or to change the owner (RE) for an SODG
 - All fees are collected in RIOO during the submission process and must be paid before the submission can be completed
 - ***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 of View details for the selected SODG



Site Code
HOUSE2

Home

My Change Info

Attachments

SODG

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

List **View** Site Details Metering - TDSP Information Unit Details Mapping Information

View SODG

Back
Continue Done or Check Progress

Site Details

[Go To Section](#) HOUSE2_TEST

Resource Entity Name	WM RENEWABLE ENERGY LLC IV (RE)
Resource DUNS Number	147449083100
Site Name	HOUSE2_TEST
Site Code	HOUSE2
Unit Name	SODG
Unit Code	HOUSE2_SODG

Address

Street Address	1 Oak St
City	Temple
State	TX
Zip	76501
County	Bell
2003 Congestion Management Zone	South

Additional Site Information

In-Service Date (Production Load Date)	11-05-2024
Stop Service Date	

Metering Details

[Go To Section](#) HOUSE2_TEST

Is your substation owned by a NOIE?	false
Is your generator behind a NOIE Settlement Meter Point?	false
How many Primary EPS meters do you have?	0
Who is the TDSP providing service to your site?	AEP TEXAS CENTRAL COMPANY (TDSP) (DUNS: 007924772)
Resource ID (RID)	11112222333344445555
Does your site have an ERCOT read meter?	false
ESI ID (Optional)	11112222333344445555

Unit Details

[Go To Section](#) HOUSE2_TEST

Unit Information

Unit Name	SODG
Technology Type	Gas Turbine
Number of Turbines	
Physical Unit Type	Simple-cycle Combustion (gas) turbine (includes jet engine design)

Name Plate Rating

Name Plate Rating MW	2.5
Name Plate Rating MVA	2.5

Renewable

Is your generator a renewable energy resource?	No
Is it a renewable credit generator (RN) or a renewable offset (RO)?	N/A

Fuel Information

Primary Fuel Type	Natural Gas (use this fuel type for steam turbines which are part of a combined cycle train)
Secondary FuelType (Optional)	Not Applicable

Generic Information

Generic Fuel Category	Simple Cycle <= 90 MW
Generic Start-up / Operating Category	Gas-Peaking

Mapping Details

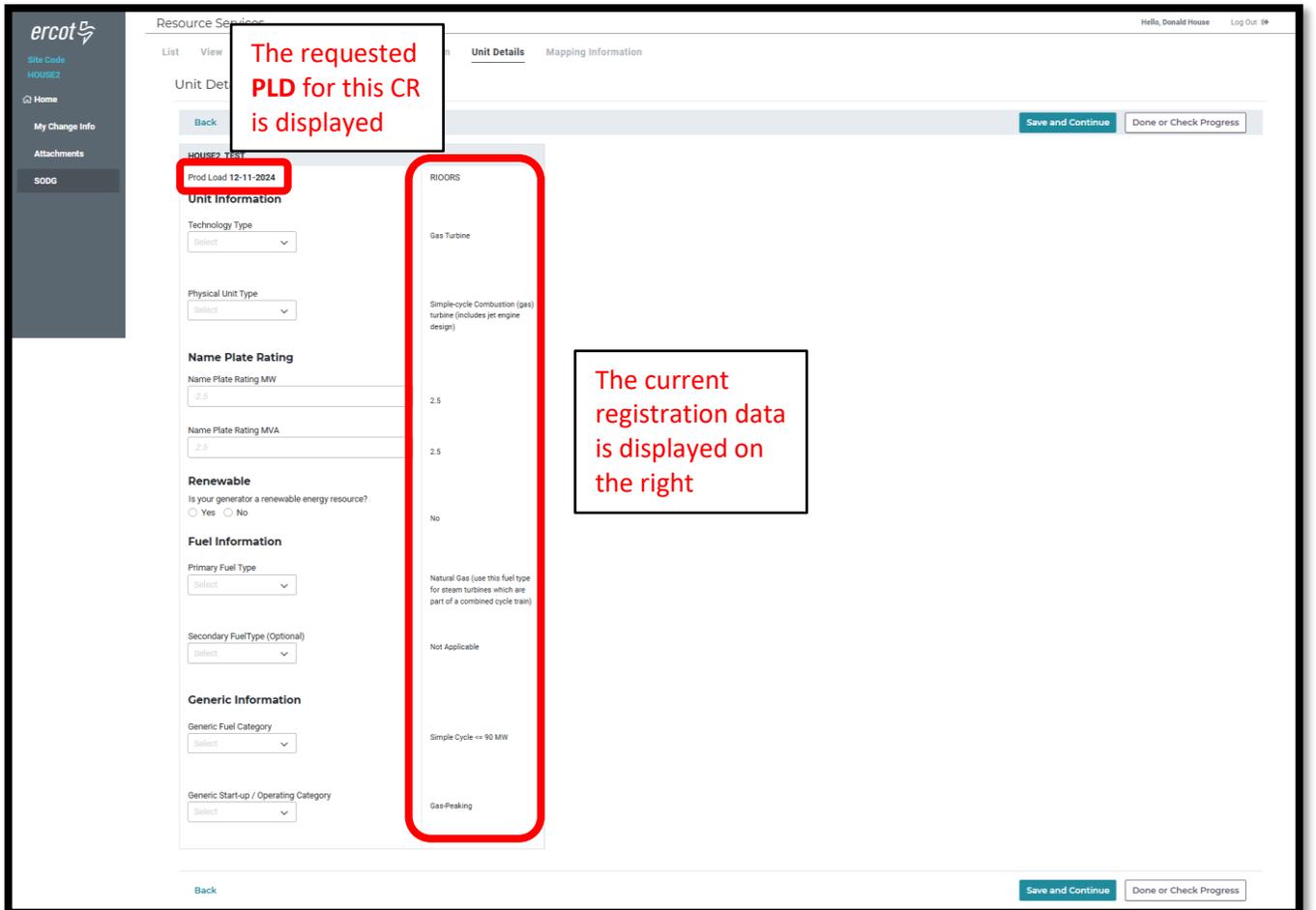
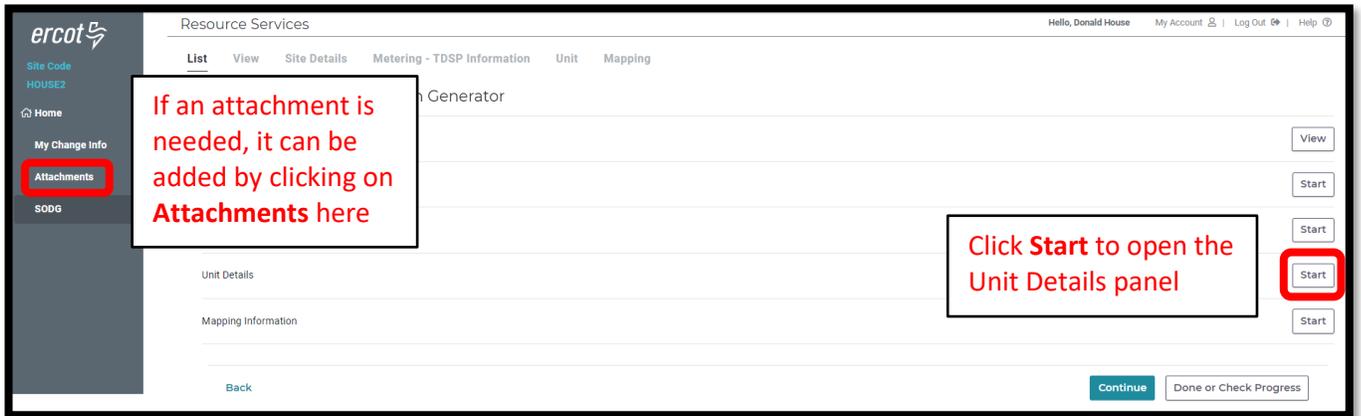
[Go To Section](#) HOUSE2_TEST

Substation Code for POD	PANDA_T1
Transmission Bus POD - PTI Bus #	150902
Voltage	18
Load Name in Network Operations Model	PANDA_T1_L2

Back
Continue Done or Check Progress

Change Request example

- This example will update the Unit Details and will trigger a registration fee
- Note that RIOO – RS doesn't currently require attachments to updates
 - However, if any of the data found on the TDSP Read Form is updated in the CR (Metering – TDSP Information or Mapping Information panels), the user must also coordinate with the TDSP to get an updated TDSP Read Form to attach to the submission; if the form isn't attached, ERCOT will send the CR back to the user to request the attachment.



Unit Details

HOUSE2_TEST

Prod Load 12-11-2024

Unit Information

Technology Type: Gas Turbine

Physical Unit Type: Simple-cycle Combustion turbine (includes jet engine design)

Name Plate Rating

Name Plate Rating MW: 3.5

Name Plate Rating MVA: 3.5

Renewable

Is your generator a renewable energy resource? No

Fuel Information

Primary Fuel Type: Natural Gas (use this fuel type for steam turbines which are part of a combined cycle train)

Secondary Fuel Type (Optional): Not Applicable

Generic Information

Generic Fuel Category: Simple Cycle <= 90 MW

Generic Start-up / Operating Category: Gas Peaking

Buttons: Save and Continue, Done or Check Progress

Callout 1: Updates to the **Name Plate Rating MW** and **Name Plate Rating MVA** are entered by the user (in this example, the 1 MW increase will trigger a \$2,300 fee)

Callout 2: Click **Done or Check Progress** to confirm the changes pass data validation; note that you can also click **Save and Continue** to move to the next data panel

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

Resource Services

Everything looks good!

Settlement Only Distribution Generator

Unit Details Revisit

Edit

Continue

Callout: Click **Continue** to review changes and make payment

My Change Info

Requested Production Load Date	12-11-2024
Contact Name	Donald House
Email	fake@email.com
Phone Number	555-867-5309
Description of your Change Request	Testing SODG updates

Unit Details

	Before	After
Name Plate Rating MW	2.5	3.5
Name Plate Rating MVA	2.5	3.5

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

Go to Payment

ERCOT logo
2705 West Lake Drive
Taylor, Texas 76574
(512) 248-3000

Testing SODG updates

HOUSE2

INVOICE DATE: November 5, 2024

DUE TODAY: \$2,300.00

Change Request No. RSCR 7262

TOTAL DUE: \$2,300.00

Continue to Payment

- Sample payment screen using credit card

Order Summary

Invoice Number	7322	Request	Total	\$ 2,300.00
----------------	------	---------	-------	-------------

Credit Card

Card Number * Exp. Date * Card Code

Billing Address

First Name Last Name
Billing Country: USA Zip
Street Address City
State Phone Number

ah_test@fastmail.com

Pay Cancel

- Sample payment screen using bank account

The screenshot shows the ERCOT payment interface. At the top, there are navigation tabs for Home, SODG, Invoice, and Payment. The user is logged in as Donald House. The main content area is titled "Payment" and includes an "Order Summary" section showing an invoice number of 7262 and a total amount of \$ 2,300.00. Below this, there are two radio button options: "Credit Card" and "Bank Account (USA Only)", with the latter selected. The "Bank Account" section includes fields for Bank Name, Account Number, and Bank Account Type (set to Personal Checking). The "Billing Address" section includes fields for First Name, Last Name, Street Address, State, City, Zip, and Phone Number. The email field is pre-populated with "dh_test@fastmail.com". At the bottom right, there are "Pay" and "Cancel" buttons. Three red callout boxes provide instructions: one pointing to the invoice number, one to the selected bank account option, and one to the "Pay" button.

The CR number is listed as the **Invoice Number**

User selects to make payment with a **Bank Account**

The user's **Email** is pre-populated

After bank and billing info is entered, click **Pay** to complete the transaction and view the payment confirmation

- Sample payment confirmation

The screenshot shows the payment confirmation screen. It features a "Thank you for your payment" message. Below the message, the project's Change Request Number is displayed as "RSR 7262". A button labeled "Back to Change Request List" is highlighted with a red box. A large green checkmark is visible on the right side of the screen. A red callout box provides instructions on how to return to the Change Request List.

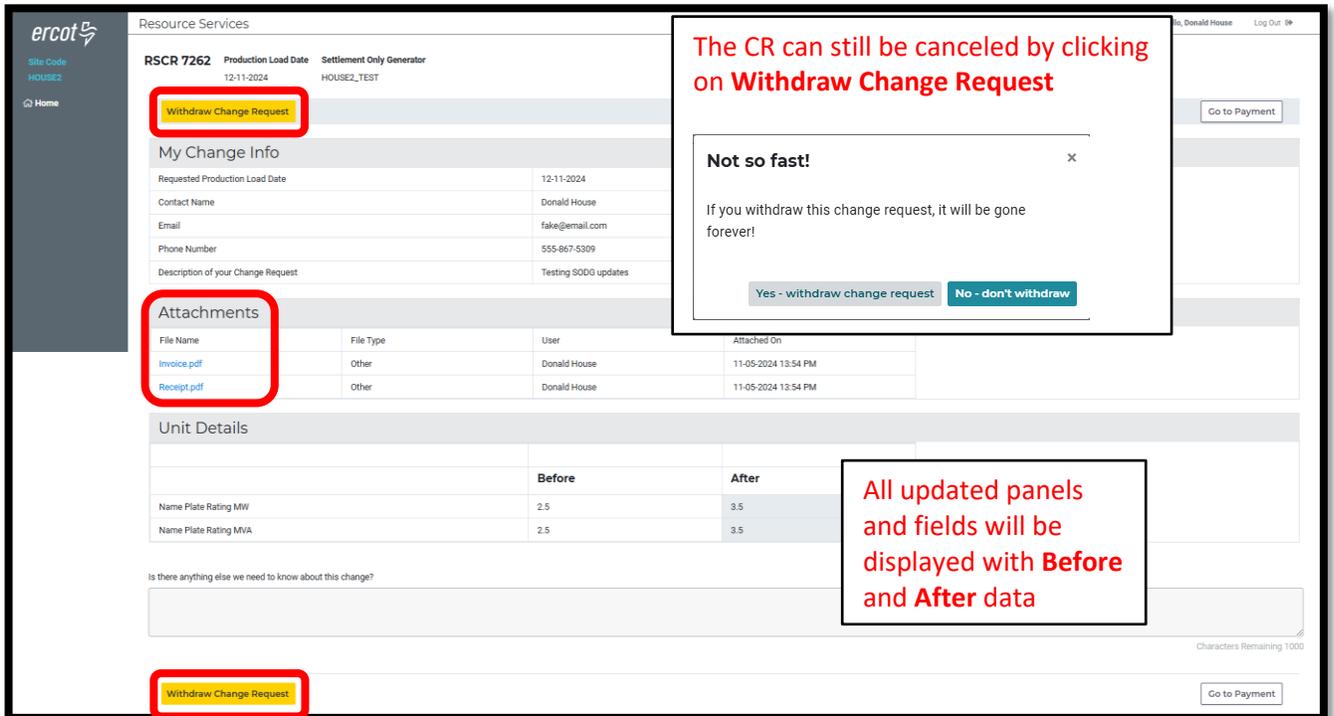
The CR number is listed on the payment confirmation

Click **Back to Change Request List** to return to the Submitted Change Requests screen; this action will complete the CR submission

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



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



RE/Ownership change for an existing SODG

Changing the RE (owner) of an existing SODG requires coordination between the current RE, the new RE, the TDSP, and ERCOT.

- The process typically starts with communication between the REs to discuss the ownership change and to determine when it should occur
 - The Demand Integration team can help coordinate this communication
 - Before accepting the ownership change, Demand Integration must receive email confirmation from both REs agreeing to the details of the change (preferably from the Authorized Representatives (ARs) or the back-up ARs)
 - The email is to be sent to ERCOTLRandSODG@ercot.com and must include at least the following information:
 - Site Code for the SODG
 - Current RE name and DUNS #
 - New RE name and DUNS #
 - Requested PLD (must be at least 30 days into the future and should be coordinated with Demand Integration)
- The new RE must request an updated [TDSP Read Generation Metering Registration Form](#) (TDSP Read Form) from the TDSP providing service to the site, unless the site is using an ERCOT-Polled Settlement (EPS) meter
 - The updated form must include the new RE name and DUNS #
 - Note that the new RE must have a QSE partnership in place for settlements; if not, the CR will not be processed until the QSE is in place, which could delay the PLD
 - The PLD and the meter data start date on the TDSP Read Form must match the requested PLD for the RE change
 - The new RE will provide the updated TDSP Read Form to the current RE to attach to the CR in RIOO
- After the change confirmations are complete, and the updated TDSP Read Form is received, the current RE must submit a CR to request the RE change
 - The CR will update the RE in the RIOO database and will change who can access the SODG data in RIOO – RS from the current RE to the new RE on the requested PLD
 - In the CR, only a description of the change, selection of the new RE, and an attached TDSP Read Form are needed
 - In the “Change Description” box, the current RE should type a note like: “Change the RE for the [‘Site Code’] SODG on ‘PLD’. Current RE: [‘Name and DUNS #’]; New RE: [‘Name and DUNS #’]”
 - The updated TDSP Read Form, if needed, must be attached
 - No data panels should be changed
 - The SODG should be transferred with all of the current registration data in place
 - If anything needs to be changed, the new RE can submit a CR after the transfer is complete

- Sample RE change submission

Resource Services

Hello, Donald House Log Out

Start Your Change Request

All fields are required unless marked otherwise

What type of change request?
 Standard Ownership

What SODG is this change for today?
EMAILTST - EMAIL_TEST

Requested Production Load
12-11-2024

Who can we contact about this change request?
Contact Name: Donald House
Email: fake@email.com
Phone Number: 555-867-5309

Change Description
Change the RE for the EMAILTST SODG on 12/11/2024. Current RE: MARLIN SOLAR LLC, DUNS #0801184113000; New RE: MP2 ENERGY LLC, DUNS #8330528193000.
Characters Remaining 255

Let's Get Started

Select "Ownership" for the type of change

Select the SODG from the dropdown list

Click Let's Get Started to move to the SODG List screen

Resource Services

Hello, Donald House Log Out

List View Site Details Metering - TDSP Information Unit Details Mapping Information

Settlement Only Distribution Generator

View

Site Details

Metering - TDSP Information

Unit Details

Mapping Information

Back Continue Done or Check Progress

Start

Click Start to open the Site Details panel

- **NOTE: For an ownership change, the user can edit the RE name but cannot edit any other information in the data panels**

Use the type-ahead feature to enter the new RE name; when selected, the DUNS # will also be populated

The current RE name and DUNS # are pre-populated

Click Done or Check Progress to continue

Click Attachments to add the updated TDSP Read Form

ercot Resource Services Hello, Donald House Log Out

Attachments

Please Note
A TDSP Read Generation Form is mandatory for all SODG INR and CR Submission to ERCOT.

File Name	File Type	User	Date
TEST_ERCOT_TDSPReadGeneration_Form_v6.1.pdf	Other	Donald House	12-10-2024 11:32 AM

Click Continue to move to the SODG List screen and finish the submission

Click Choose File to upload the updated TDSP Read Form

Choose File

Continue

ercot Resource Services Hello, Donald House Log Out

Settlement Only Distribution Generator

View Site Details Metering - TDSP Information Unit Details Mapping Information

View Edit Start Start Start

Click Done or Check Progress

Continue Done or Check Progress

ercot Resource Services Hello, Donald House Log Out

Everything looks good!

Settlement Only Distribution Generator

Site Details Revisit

Click Continue

Continue

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

The screenshot shows the 'Resource Services' interface for RSCR 7380. The page is titled 'Resource Services' and includes a user greeting 'Hello, Donald House' and a 'Log Out' link. The main content area is divided into several sections:

- My Change Info:** A table with the following data:

Requested Production Load Date	12-11-2024
Contact Name	Donald House
Email	fake@email.com
Phone Number	555-867-5309
Description of your Change Request	Change the RE for the EMAILST SODG on 12/11/2024. Current RE: MARLIN SOLAR LLC, DUNS #0801184113000; New RE: MP2 ENERGY LLC, DUNS #9330528193000.
- Attachments:** A table with the following data:

File Name	File Type	User	Attached On
TEST_ERCOT_TDISPReadGeneration_Form_v6.1.pdf	Other	Donald House	12-10-2024 11:32 AM
- Site Details:** A table comparing 'Before' and 'After' states:

	Before	After
Resource Entity Name	MARLIN SOLAR LLC (RE)	MP2 ENERGY LLC (RE)
Resource DUNS Number	0801184113000	8330528193000

At the bottom right, a red box highlights the 'Submit to ERCOT' button, with a callout text: 'Click Submit to ERCOT to finish the submission'.

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

Stopping an existing SODG

To stop an existing SODG, only the **Stop Service Date** on the Site Details panel needs to be updated

- The **Stop Service Date** needs to be a PLD coordinated with the ERCOT Demand Integration team (ERCOTLRandSODG@ercot.com)
- The rest of the CR process is the same as when updating an SODG
 - An updated TDSP Read Form is not needed
- **NOTE: Once the Stop Service Date is populated in the CR, the user cannot edit any other information in the data panels**
 - **After the CR is submitted, no other CRs can be created for this SODG**
 - If a mistake is noticed before the PLD, the RE can contact ERCOT Demand Integration to request for the CR to be canceled

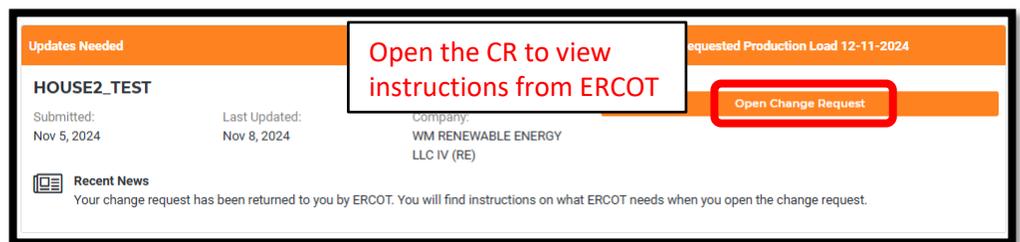
The screenshot shows the 'Site Details' form in the ERCOT Resource Services application. The 'Additional Site Information' section contains a 'Stop Service Date' field, which is highlighted with a red box and contains the date '12-04-2024'. A red callout box with white text points to this field, stating: 'Use the calendar to select the requested Stop Service Date (PLD); reminder to coordinate the date to align with a production model load'. The form also includes fields for 'In-Service Date (Production Load Date)', 'Resource Entity Name', 'Resource DUNS Number', 'Site Name', 'Site Code', 'Unit Name', and various address fields (Street Address, City, State, Zip, County). The '2003 Congestion Management Zone' field is also present. The form is titled 'Resource Services' and 'Site Details'.

After submitting Change Request

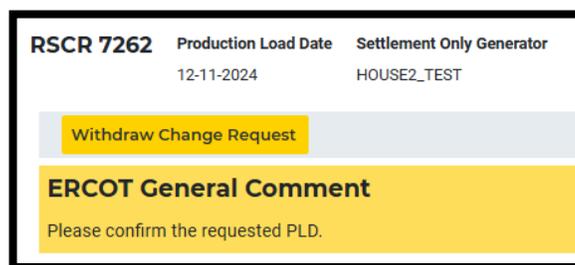
Change Request status

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

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



- Instructions are included when the CR is opened



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

Confirming updated SODG in production Network Model

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

Creating a new SODG

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



Troubleshooting RIOO issues

User account

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

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

Problems viewing data or completing submissions

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

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

Reporting issues

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