

# RIOO User Guide – Updating an Existing Load Resource

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# **ERCOT RIOO Resource Services**

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

# About this guide

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

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

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

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# **Before starting your Change Request**

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

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

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

## **Coordinate a Production Load Date (PLD)**

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

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

#### **Important notes on Change Requests**

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

# Logging into RIOO

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





• Log into your RIOO account:



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

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© LOCATION Sandy, United States	Lost your device? Use the recovery code	Lost your device? Use the recovery code
Deny Allow		

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



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

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# **Overview of RIOO Resource Services**

- On the RIOO home screen, open Resource Services by clicking on the Load Resource button
  - Resource Services is used to update an existing LR
  - $\circ~$  Interconnection Services is used to create a new LR
    - See RIOO User Guide Creating a New Load Resource on the Load Resources webpage for details

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

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		WAL MART STORES TEXAS LLC (RE)

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

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 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)

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- $\circ~$  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

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# Change request for an existing LR

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

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

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			You do not have any incomplete change requests yet.		

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

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• Sample completed Start Your Change Request panel

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

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• Sample of View details for the selected RE

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ercot	Resource Services	Hello, Donald House Log	g Out 🕪
010019	List View Load Resource Info Data Agg and Settlement Info Mapping Limits Attestation		
යා Home			
My Change Info	Load Resource		
Attachments	View	v	view
Load Resource	Load Resource Info		Start
		Click <b>Start</b> to open any	
	Data Agg and Settlement Info	of the data panels to	Start
	Mapping Information	continue this LP	Start
	Limits & Op Params	registration	Start
	Attestation Regarding Critical Load Status	s	Start
		Continue Done or Check Prog	ress

#### **Change Request example**

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

ercot 🕏	Resource Services		Hello, Donald House Log Out @
යා Home	List View Load Resource Info Data Agg and Settlement Inf	fo Mapping Limits	
My Change Info			
Attachments Load Resource	Back Select	Limits & Op Params panel	Save and Continue Done or Check Progress
	Back		Save and Continue Done or Check Progress

- When selecting the LR, multiple LRs can be selected on the panel and updated at the same time
  - Different data can be updated for each LR
    - For example, the user can update the High Reasonability Limit for one LR and update the Min Notice Time for another LR on the Limits & Op Params panel at the same time
- The user can also select different LRs to update on each panel
  - For example, the user may update LR\_1 on the Mapping Information panel and update LR\_2 on the Limits & Ops Params panel in the same CR

View   View dataward w daged extensed w opped View View<	ercot	Resource Services			Hello, Donald House Log Out 🕪
Umits & Op Params   Select the LR to be updated from the drop-down list; multiple LRs can be selected and updated at the same time   The selected   LR and the requested PLD for this CR are displayed   umits displayed   The current registration data is displayed on the right   umits displayed	01001 -7	List View Load Resource Info Data Agg	and Settlement Info Mapping	J Limits	
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Image: Contract of the selected in the same time   The selected intractor the selected in updated at the same time The selected intractor the selected in updated at the same time The current registration data is displayed on the right The right	My Change Info			Select the LR to be updated	
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The selected   IR and the   requested PLD   isplayed     isplayed     immunication	Load Resource	1 Selected	~	multiple LRs can be selected	
Putter 11 rese     The selected   LR and the   requested PLD   for this CR are   displayed   wally Linit   w		GEORSO_LD5	×	Inditiple Lits can be selected	
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The selected   LR and the   requested PLD   for this CR are   displayed   wide   ubity Limits   wide   wide   wide   is		Load Resource Type	UFR/Interruptible		
Ihe selected   LR and the   requested PLD   for this CR are   displayed   satistruints   maker filter   maker filter   maker filter   ability   maker filter   ability   ability   maker filter   ability   ability   ability   ability   ability   ability   maker filter   ability   ability <th></th> <th>· · · ·</th> <th></th> <th></th> <th></th>		· · · ·			
LR and the   requested PLD   for this CR are   ability Lints   redingention Time   ability Lints   referenceionity Lint   ability Lints   referenceionity Lints   referenceioni	The selec	um Loads			
requested PLD   for this CR are   uidipunite   uidipunite </th <th>LR and th</th> <th>1e d at POD</th> <th></th> <th>The second</th> <th></th>	LR and th	1e d at POD		The second	
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Image: Constraint of the second s		Minimum Restoration Time			
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Image: matrix of the second secon		Max Interruption Time			
Max Daily Deployments     2       2     Max Weekly Energy       7600     MWH et       1600     Min Notice Time       70     Minute       10		B	8		
2           Max Weekly Energy           7600           Min Notice Time           70           10		Max Daily Deployments			
Max Weekly Energy         1680           Min Notice Time         10			2		
/ root         Janvinder         1680           Min Notice Time         10		Max Weekly Energy			
Min Notice Time 7.0 Minutes 10		MWH	1680		
		Min Notice Time			
		, U			
Back Save and Continue Done or Check Progress		Back			Save and Continue Done or Check Progress



ercot 등	Resource Services		Helio, Donald House Log Out &
් Home My Change Info	List View Load Resource Info Data Agg and Settlen Load Resource	A green Edit button	
Attachments	View	Click Continue or Start	means that initial
Load Resource	Load Resource Info	for another panel to	data validation is
	Data Agg and Settlement Info	make more updates;	edits are required
	Mapping Information	Click Done or Check	on that panel
	Limits & Op Params	Progress to view the	Edit
	Attestation Regarding Critical Load Status	update dashboard	Start
			Continue Done or Check Progress

- 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

ercot 🕏	Resource Services		Hello, Donald House	Log Out 🕪
ය Home		Everything looks good!		
My Change Info				
Attachments		✓ Limits & Op Paramo Revisit		
Load Resource		Click <b>Continue</b> to view the update summary		

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

ercot	Resource Services				Hel	lo, Donald House Log Out 🕪
© Home	RSCR 7265 Production Load Di 12-11-2024	ate Load Resource TEST - HRL increase for GEORSO_LD5			Click Go to Payment to begin	
	My Change Info	Click <b>Go Back To Se</b> additional edits are	<b>ction</b> if needed		payment process; if payment is not	Go to Payment
	Requested Production Load Date		12-11-2024		needed, Submit to	
	Contact Name		Donald House		FRCOT button will	
	Email		fake@email.com			
	Phone Number		555-867-5309		be on this screen	
	Description of your Change Request		TEST - HKL INCrease for GEORSO_LD5			
	Limits & Op Paran	ns				
	Go Back to Section	GEORSO_LD5				_
		Before		After	All undated nanels	
	Total Load at POD	10		15		
	Interruptible Load	10		15	and fields will be	
	High Reasonability Limit	10	15		displayed with	
	Max weekiy Energy	1000		2020	Before and After	
	Is there anything else we need to know	v about this change?			dete feather and Arter	
					data for the user to	
					make a final review	
						Characters Remaining 1000
						Go to Payment

ercol <sup>0</sup> ट्ट ्रि Home 📮 Load Resourc	suuros Invoice Payment. Percot logo 2705 West Lake Drive Talylor, Texas 76574 (512) 248-3000		The <b>Invoice Date</b> is the current day, and the payment is always <b>DUE TODAY</b>		5	The Change Request No. is listed on the invoice		eccount 🛓 i Log Out 🕞
	TEST - HRL increase for GEORSC	)_LD5		INVOICE DATE November 8, 2024		DUE TODAY \$500.00		
The LR DAC is displayed	DESCRIPTION GEORSO_LD5	Click Contin	aue te Pa	ment to	OTAL DUE:	PRICE \$500.00 \$500.00		
here	move on to		the Payment screen			Print Invoic Continue to Payment		

• Sample payment screen using credit card

ercot₽					Hello, Donald House	My Account 🚔   Log Out 🕞
යි Home 🕻	Load Resource Invoice Payment	Order Summary	The CR numbe as the <b>Invoice</b>	er is listed <b>Number</b>		
	User selects to make payment with a <b>Credit Card</b>	Involce Number  Cardii Card  Card Number	7255 Total Bank Account Exp. Date •	\$ 500.00 (USA Only) Card Code		
		Billing Address First Nome Image County USA Street Address	Last Name Zip City	After card a	and billing info is	
	The user's <b>Email</b> is pre-populated	state dh_test@fastmail.c	Phone Number	entered, cl transactior confirmatio	ick <b>Pay</b> to complete the a and view the payment on	

• Sample payment screen using bank account

ercot₽					не	lo, Donald House	My Account 💄   Log Out 🕞
쉾 Home	Load Resource Invoice Payment						
	The CR number is listed as the <b>Invoice Number</b>	Order Summary	Total  Bank Account (18 Name On Account  ABA Routing Number Lost Name	\$ 500.00 A Gray	User selects to make payment with a <b>Bank Account</b>		
	The user's <b>Email</b> is pre-populated	Street Address State Their tast@fastmail.com	Zip City Phone Number	After enter trans confi	bank and billing info is ed, click <b>Pay</b> to comple action and view the pay rmation	te the /ment	

• Sample payment confirmation

ercot₽		Click Deals to Change	Hello, Donald House My Account 🚨   Log Out 🚱
A Home Load Resource Invoice Payment		Click Back to Change	
The CR number is listed on the payment confirmation	Thank you for your payment Your project's Change Request Number Is: RSCR 7265 Back to Change Request List	Request List to return to the Submitted Change Requests screen; this action will complete the CR submission	⊘

• Back on the RIOO home screen, open Resource Services again by clicking on the Load Resource button

ercot⊱	RIOO		Hello, Donald House	My Account 2
ධ Home	Second Services	Resource Services Update or view your existing resource data.		
	Go to Interconnection Services - IS	SODG Generation	Load Resource	

- 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
  - o The CR will no longer appear on this display after the changes go into Production on the PLD

ercot	Resource Services					Hello, Donald House	Log Out 🕪
C1001 9	Submitted Char	nge Requests			View Load Resources		
් Home				Create a New LR Change	Company Name		
SODG					Select Company Name		~
	Pending Review at ERCOT		RSCR 7265	Requested Production Load 12-11-2024			View Company
Generation	Submitted:	Last Updated:	Company:	View Change Deguest	Incomplete Change Requests		
Load Resources	Nov 8, 2024	Nov 8, 2024	MARLIN SOLAR LLC (RE)	Ten change request			
	Recent News	a weiting for review at EDCC	ν <del>τ</del>		You do not have any incomplete change requests yet.		
	Four change request	s waiting for review at ERCC	л Л				

- Click on View Change Request to view a summary of the changes
  - $\circ~$  If a payment was required, the invoice and receipt will be attached
  - $\circ~$  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)

ercot导	Resource Se	rvices			The CR can still	Il be canceled by clicking	Donald House Log Out 14
() Home	RSCR 7265	Production Load Date	Load Resource		THE CK Call Su	ii be canceled by clicking	
La Honne		12-11-2024	TEST - HRL increase for GEOR	SO_LD5	on <b>Withdraw</b>	Change Request	
	Withdraw	Change Request					Go to Payment
	My Cha	inge Info			Not so fast! ×		
	Requested Pro	oduction Load Date		12-11-2024			
	Contact Name			Donald House	If you withdraw this char	nge request, it will be gone	
	Email			fake@email.com	forever!		
	Phone Numbe	r		555-867-5309			
	Description of	your Change Request		TEST - HRL increase for GEORSO_LD			
	Attachr	ments			Yes - withdraw cha	ange request No - don't withdraw	
	File Name		File Type	User	Attached On		_
	Invoice.pdf		Other	Donald House	11-08-2024 16:29 PM		
	Receipt.pdf		Other	Donald House	11-08-2024 16:29 PM		
	Limits	Limits & Op Params					7
			GEORSO_LD5			All updated panels	
			Before		After		
	Total Load at	t POD	10		15	and fields will be	
	Interruptible	Load	10		15	displayed with <b>Before</b>	
	High Reason	ability Limit	10		15		
	Max Weekly	Energy	1680		2520	and After data	
	Is there anything	else we need to know ab	out this change?				
							Characters Remaining 1000
	Withdraw	Change Request					Go to Payment

# **RE/Ownership change for an existing LR**

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

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

#### • Sample RE change submission

ercot	Resource Services		Hello, Donald House	Log Out 🕪
	Start Your Change Request			
යා Home	All fields are required unless marked optional			
	What Company is this change for Index?			
	Impersenzation of the second s			
	Requested Production Load			
	Contact ERCOT for Interim Updates. Otherwise choose a date at least			
	90 days in the future.			
	Who can we contact about this change request?			
	Contact Name Donald House			
	Email fale/agenal.com			
	In regent res. Control			
	Phone Number			
	000-00-00-00	Click Latte Cat C		
	Change Description Change Description Change Loss LAN LD1 I B on 1/8/2025 Current BE: CLIBRENT BE NAME DUINS #1224557892000: Current OS: CLIBRENT OSE NAME DUINS #1224557892000 Average BE: NEW BE NAME	Click Let's Get St	arted to	
	Change time to the UNEXCITE OF The Second Control of Co	move to the LR I	ist scree	n 🗌
	di di seconda di second			
	Characters Remaining 23			
			Let's Get Star	ted

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

ercot 🛱	Resource Services					Hello, Donald House	Log Out 🚱
	Attachments						
ଲ Home My Change Info		User	Date	8			
Attachments Load Resource	Click Attachments to add any						
	files; can be helpful if several	If several			Choose File		
	LRs are being transferred					Conti	nue
		-					

ercot 🖗	Resource Services Attachments						Clie	ck <b>Continue</b> to move
 My Change Info		File Name	File Ty	pe User	Date	e	to	the LR List screen and
Attachments		TEST_RE Change Request Details.docx	Other	Donald House	11-08-2024 17:58 PM	ŵ	fin	ish the submission
Load Resource							Choose File	
								Continue

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

arcot	Resource S	Services				Hello, Donald House Log Out 🖗
ଜା Home	RSCR 7266	Production Load Date 01-08-2025	Load Resource Change the RE for the LAN_LD1 LR on 1/8/2025. Curre DUNS #9876543212000	nt RE: CURRENT RE NAME, DUNS #12345678930	00; Current QSE: CURRENT QSE NAME, DUNS #123	4567892000, New REINEW REINAME, DUNS #9876543212000, New GSEINEW GSEINAME,
						Download Load Resource Data Submit to ERCOT
	My Ch	ange Info				
	Go Back To	Section				
	Requested I	Production Load Date		01-08-2025		
	Contact Nar	ne		Donald House		
	Email	Email fake@email.com				
	Phone Number			555-867-5309		
	Description	of your Change Request		Change the RE for the LAN_LD1 LR on 1/8/20 #1234567893000; Current QSE: CURRENT QS RE NAME, DUNS #9876543212000, New QSE	25. Current RE: CURRENT RE NAME, DUNS E NAME, DUNS #1234567892000, New RE: NEW NEW QSE NAME, DUNS #9876543212000	
	Attack	nments				
	Go Back to	Section				
	File Name		File Type	User	Attached On	
	TEST_RE C	nange Request Details.docx	Other	Donald House	11-08-2024 17:58 PM	
	Is there anythi	ng else we need to know ab	out this change?			Click <b>Submit to ERCOT</b> to finish the submission
						Download Load Resource Data

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

## Stopping an existing LR

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

ercot	Resource Services		Helio, Donald House Log Out 🕪
ය Home	List View Load Resource Info Data Agg and Settlement Info	Mapping Limits	
My Change Info	Load Resource Info		
Attachments	Back		Save and Continue Done or Check Progress
Load Resource	1 Selected V		
	SL_LD1	×	
	Prod Load 12-11-2024 RIOORS		
	ENTERPRISE SEAWAY - JONES CREEK Use the cale	ndar to select the requested <b>Stop Date</b>	
	Physical Street Address for Point of Deliv (1 day before	e the PLD): reminder to coordinate the	
	PID to align	with a production model load	
	Name of City for Point of Delivery (POD)		
	Stop Date 12:10-2024 ×		
	Back		Save and Continue Done or Check Progress

# After submitting Change Request

## **Change Request status**

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

- Status update text on the CR dashboard for a submitted CR include:
  - Your change request is waiting for review at ERCOT (Pending Review)
    - The user can still withdraw the CR when in this status
  - o 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

Updates Needed		Open the CR to vie	w	equested Production Load 12-11-2024		
		instructions from ERCOT				
Submitted: Nov 8, 2024	Last Updated: Nov 8, 2024	Company: MARLIN SOLAR LLC (RE)		Open Change Request		
Recent News         Your change request has been returned to you by ERCOT. You will find instructions on what ERCOT needs when you open the change request.						

• Instructions are included when the CR is opened



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

#### **Confirming updated LR in production Network Model**

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

#### **Creating a new LR**

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

ercot 🛱	RIOO		Hello, Donald House	My Account 음
01001-7				
යි Home	Interconnection Services	Resource Services Update or view your existing resource data.		
	Go to Interconnection Services - IS	SODG Ceneration	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 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
  - $\circ$   $\;$  Any of these issues prevent the "submit" button from being activated
  - $\circ$   $\;$  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 <u>RIOO-Help@ercot.com</u> and <u>ERCOTLRandSODG@ercot.com</u>. Significant updates to the application may be communicated through market notices.