Q&A from ERCOT Training on Weatherization and Inspection Portal for Market Participants

Q. Has the training presentation been posted?

A. Yes, it is available at https://www.ercot.com/gridinfo/generation/summerready in the "Weatherization & Inspection Market Participant Portal Training" folder.

Q. Does the Cure Period 'clock' begin when we receive the Task or following the Inspection?

A. The cure period clock begins when you are notified of the compliance deficiency. That may be during the inspection or after it. The end date of the cure period (your deadline to have remedied the deficiency) will be formally communicated on the inspection report.

Q: What historical reports will be available in the portal?

A: At this point, only Declarations of Weather Preparedness and Inspection Reports dated 5/1/24 or later will be stored. A few years from now there will be several seasons of data, submissions, reports, etc. available. Declarations of Weather Preparedness, Inspection Reports, etc. from earlier seasons (before summer 2024) are not currently available in the portal.

Q. For the Appendix A revisions - Is there a way to make multiple changes at once on an Excel sheet upload; or do updates need to be done line by line in the portal?

A. The Appendix A revisions must be made line by line on the form within the portal.

Q. What digital credential role is needed?

A. Everyone authorized by the individual RE or TSP companies to interact with ERCOT to submit Declarations of Weather Preparedness, respond to Notices of Inspection (NOIs), etc. will need to have the role named SN_M_W_MGR_ECEII added to their digital credential by their User Security Administrator (USA).   For others that are not authorized to act (e.g., submit Declarations) on behalf of the RE or TSP but can be benefitted by having access to the portal, a second read-only access role is SN_M_W_VIEW_ECEII. The USA should only assign one role or the other. If both are assigned, the more restrictive read-only role will govern.

Q. Is there a way to receive notifications outside of the portal when an action is required within the portal?

A. Notices of Inspection will be sent via email exclusively to the Market Participant's Authorized Representative (AR) and Backup Authorized Representative (BAR). When a Weatherization Support Case is opened by anyone with the manager (SN_M_W_MGR_ECEII) role, whomever submits the correspondence will receive an email notification when a response has been registered. For security/privacy reasons the email will not contain the actual message, but it is a prompt for them to log into the portal to read it.

Our preference is to move all weatherization communications within the portal. If that is not possible, you can contact your account manager or ERCOT client services at 512-248-3900 or clientservices@ercot.com.

Q. Is this digital certificate role currently active? i.e., if we request it today, will the role be added?

A. You can request the certificate now however, it will not be active in our system until May 1, 2024.

Q. If a previous Digital Certificate has expired is there a way to renew? Or should you just request a new one.

A. Please discuss specific digital certificate questions with your company's User Security Administrator (USA).

Q. Is there a view only access?

A. Yes, the SN_M_W_VIEW_ECEII role is available to be assigned by the USA. This role should only be assigned to personnel who do not need to interact within the portal. Both roles should not be assigned to the same person as the more restrictive VIEW role will govern.

Q. Can the roles only be assigned to RE/TSP accounts and will the users need a certificate for each plant?

A. The roles should only be assigned by the USA to company personnel needing access (either read/write or read-only) to the portal. A separate role is not required for each plant, the roles are associated with the DUNS numbers that are unique to each RE / TSP company.

Q. Is there an easy way to switch between certificates? we are finding in Chrome that we have to clear cache / cookies and restart, etc. to select a new cert to log into.

A. The expected behavior when you finish using a specific digital certificate, you should log out and end the current browser session (i.e., close all Chrome browsers). When you go back to the Market Information System (MIS) you should select the appropriate certificate for the next portal system that you want to access. Any other behaviors should be addressed by your organization's IT staff.

Q. Does ERCOT expect responses to Notices of Inspection in the Portal or still via email? (Responding back within 24 hours of notification of inspection)

A. Responses to Notices of Inspection (NOI) will occur in the portal. The AR/BAR will receive an email informing them of the inspection. This email will contain a link that will take a person with the SN_M_W_MGR_ECEII role back to the portal

where they can respond to the NOI. The AR/BAR does not have to be the respondent, anyone with the appropriate credential from their USA can do so. The AR/BAR can forward the email to the credentialed person responding to the NOI.

Q. Can multiple people have the SN_M_W_MGR_ECEII role for a company?

A. Yes, multiple people can have that role. Each company's USA will govern who receives the role.

Q. Is this training meeting being recorded to allow others to view at a later date?

A. Yes, the Thursday 4/11/24 afternoon meeting was recorded. It is available to view within the "Weatherization & Inspection Market Participant Portal Training" folder at https://www.ercot.com/gridinfo/generation/summerready.

Q. How will one work order get tied to 4 different REs if there are multiple owners at a single site?

A. One work order would only be tied to multiple REs if those REs are registered as associated with that particular inspection site.

Q. Are there any new questions assigned/created for the Declaration of Preparedness forms?

A. The items on the forms are very similar to what was on the previously used Excel sheets for Appendix A and Attachment K (and its supplement). Minor adjustments may occur in the future.

Q. Can new minor adjustments be identified to MPs prior to portal going live on 5/1? it would be helpful, since I suspect many of the MPs have already started efforts to review and collect data for attestation.

A. MPs should proceed to collect and review data in preparation for the 5/1 - 6/1 submission window.   Any minor adjustments will not affect the usefulness of your collected data.

Q. Who will get notice of inspection emails?

A. The AR/BAR will receive the NOI. They can forward it to another properly credentialed person in the company who can respond in the portal by using the link in the email.

Q. This portal is not accessible from a smart phone, right?

A. Correct, there are no mobile phone features enabled for the portal at this time.

Q. Can we update our response within the NOI response after we submit it?

A. Once you submit the response to the NOI you cannot adjust it. However, you can have a dialogue regarding that inspection and communicate any necessary adjustments.

Q. How do you get role added to your digital certificate.

A. The role required to access the portal is named SN_M_W_MGR_ECEII and can be assigned by each company's USA.   As indicated earlier, the USA should recognize that this role allows the people that have it to officially submit documents on behalf of the company.

Q. What happens when one of the units is not ready for declaration and needs to be submitted separately?

A. We will handle those units that have been in an outage and are coming out of outage during the season, or those that are newly commissioned during the

season, on a case-by-case basis. A Weatherization Support Case can be opened to request assistance.

Q. What domain is this email coming from? MPs may need to get IT to whitelist the email so that it doesn't get caught in a SPAM filter.

A. The email domain is servicenowservices.com. Please put it on your whitelists.

Q. Can there be more than one person assigned as the role required to access the portal SN_M_W_MGR_ECEII for the same MP?

A. Yes, multiple people can have that role. The role name is identical for all MPs. Each company's USA will govern who receives the role.

Q. Can it go to both AR and BAR?

A. The Notices of Inspection are sent to both the AR and BAR.