

ERCOT Weatherization & Inspection Market Participant Portal

Market Participant User Guide

ERCOT WEATHERIZATION AND INSPECTION TEAM

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Overview

Under the Public Utility Commission of Texas' (PUC/Commission) Extreme Weather Preparedness Rule, 16 Texas Administrative Code (TAC) § 25.55 ("the Rule"), the ERCOT Weatherization and Inspection (W&I) Team has been actively performing Resource Entity (RE) and Transmission Service Provider (TSP) onsite inspections since December of 2021.

Using the ERCOT Weatherization and Inspection Market Participant Portal ("the Portal"), Market Participants (MPs) will be able to submit required summer and winter Declaration of Weather Preparedness documents including Appendix A, Attachment K, Supplement to Attachment K, and Notarized Attestation items utilizing built in digital forms and self-service downloads as necessary to meet Rule requirements.

Purpose

The purpose of this Market Participant (MP) User Guide is to provide MPs with an instructional tool and guide on how best to utilize the Portal to perform actions necessary to meet the weatherization requirements defined within the Rule. Using the Portal, MPs will be able to submit required summer and winter Declaration of Weather Preparedness (DoWP) items.

In addition, the Portal will provide MPs with the opportunity to communicate with ERCOT W&I Team personnel on matters related to upcoming inspections. In the future, all Inspection Reports generated during the Summer of 2024 and later will be stored in the portal.

This User Guide will include instructions on how best to navigate the interface as well as provide instructions on how to go about meeting the obligations stated in the Rule.

The ERCOT W&I Market Participant Portal will be rolled out to MPs on May 1, 2024 and will become the primary means of communication between ERCOT and MPs on Weatherization related activities. This platform will:

- Replace the previously used DocuSign platform
- Communicate Notices of Inspection (NOIs)
- Provide an avenue via support case(s) to ask questions
- If compliance deficiencies are identified, provide a forum for submitting semi-monthly cure period progress reports

Required Permissions and Access (Digital Certificates and Roles)

You will need to reach out to your User Security Administrator (USA) and request the appropriate role be added to your digital certificate (see below):



Figure 1: Assigned role for digital certificate

Note: If you do not have a digital certificate, your USA will need to assign you one before adding the above role. After your USA issues you the certificate, download and install it. You will then be able to access the MP Portal via your ERCOT MIS login at the following link:

In addition to the SN_M_W_MGR_ECEII role, there is a Read-Only role available for MPs should they need access to see communications and documents submitted, but don't necessarily need to perform any actions. This Read-Only role is more restrictive for a MP. With this role assigned to their digital certificate, MP personnel will not be able to perform any actions within the Portal aside from viewing current existing information. <u>DO NOT ASSIGN THIS ROLE WITH THE SN_M_W_MGR_ECEII role, as this will prevent a user form performing actions within the Portal.</u>

SN_M_W_VIEW_ECEII	Read only role to view Weatherization ECEII documentation submitted in ServiceNow by MPs	RE DSP TSP
)		;

Figure 2: Assigned Read-Only role for digital certificate

Portal Overview and Navigation

Summary

Once you are logged in, you will be taken to the home page with the title: ERCOT Weatherization & Inspection Market Participant Portal. The 'Submissions & Requests' link in the middle of the page is where you will submit your Declaration of Weather Preparedness documents.

- Search Bar This bar will allow you to search items within your portal. For the time being, it will search knowledge articles related to frequently asked questions (FAQs).
- Knowledge Base This is where you can go to access knowledge articles related to the inspection process, documentation, FAQs, and other items related to Weatherization and Inspection activities.
- Submissions & Requests This is where you will submit your Declaration of Weather Preparedness documentation. In addition, you will be able to create Weatherization Support cases here to make requests and ask questions of the W&I team.
- My Lists This is where you will be able to access your various cases (Declaration of Weather Preparedness cases, support cases, Notice of Inspection, etc.)
- Portal Header Provides access to: Knowledge Base, My Lists, Completed Submissions, Work Orders, and Your Profile
- Announcements and News Provides important information to Market Participants
- Articles Provide access to Featured Article Content, and Useful Articles
- Cases Shows cases that have not been Resolved or Closed
- Tasks If MPs are assigned a Cure Period, that task will show up here

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Figure 3: Portal Overview

Knowledge Base

By selecting the "Knowledge Base" widget on the portal home page, the Knowledge page will open. Here, MPs can browse and search for helpful articles, as well as rate the article(s).

There are 2 places where the MPs can access the Knowledge Base. One way is by clicking the menu on the middle of the Homepage and the other method is through the header menu at the top right of the page.

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Cases	Most Useful Articles	News
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WSUP00001006	Featured Articles	Test News Article
WSUP00001008	Prepare for Hurricane Bert KB0012225 + 65 Views + 9d ago + ★★★☆☆	This is the news
Open • Weatherization Support ticket • • ROLE USER		

Figure 4: Knowledge Base widget



Figure 5: Knowledge Base access from portal header

Submissions & Requests

On the homepage, MPs can select "Submissions & Requests" via the widget. This will take the MPs directly to the Request Catalog where they can view all "Services" available to them at any given time. They can further refine the options shown, by selecting a Category, which will display the request options tied to that category.

MPs will see 3 categories for the time being:

- 1) DoWP TSP/RE Summer
- 2) DoWP TSP/RE Winter
- 3) Support

From here, select the appropriate category for the action you wish to perform. Both Support and DoWP requests go directly to the Weatherization and Leadership team.

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Knowledge Base Browse, search, and rate articl	Submissions & Requests Contact support to make a request, or report a profilem.	My Lists Access my lists to stay up to submissions and activity.	o date on	1	
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Figure 6: Submissions & Requests widget

My Lists

All Cases, My Cases, & My Requests

The "My Lists" page provides personalized information for the MPs:

- All Cases
- Action Needed
- My Cases
- My Case Tasks
- My Requests

For the time being, All Cases, My Cases, and My Requests will show the same information. It displays all the different types of cases the MPs has such as:

- Weatherization Support Case
- Declaration of Weather Preparedness Case
- Notice of Inspection Cases

Please note, all cases will show up regardless of their current state: New, Open, Draft, Cancelled, and Closed.

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Figure 7: My Lists widget

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Multiste	-									
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Action Needed	Y AI									
My Cases	Number	Company	Task type	Contact	Short description	State	Updated ~			
My Case Tasks	00001233		Preparedness	OPERATOR USER	Weather Preparedness	Crait.	05:10:05 PM			
My Requests	WSUP00001016		Weather Support	KING CREEK OPERATOR USER	Weatherization Support ticket	New	03-01-2024 01:31:48 PM			
	WSUP00001015		Weather Support	KING CREEK OPERATOR USER	Weatherization Support ticket	New	03-01-2024 01:31:06 PM			
	DOWP00001156		Declaration of Weather Preparedness	KING CREEK MGR USER	RE - Summer - Declaration of Weather Preparedness	Closed	02-28-2024 07:16:19 PM			
	< > 1	Rows 1 - 4	of 4							
										ercot 🛱

Figure 8: My Lists personalized case detail

Action Needed

The Action Needed section documents case status (either New, Open, OR Awaiting Info). These are cases that are not closed or resolved and have actions on either ERCOT side or the MP side still pending completion or action items.

e 🕻 My Lists					Search		Q	
Lists		led						
Cases	All > State	in (New, Op	en, Awaiting Info)					
tion Needed	Number	Company	Task type	Contact	Short description	State	Updated 🗸	
Cases	WSUP00001006		Weather Support	LCRA OPR ROLE USER	Weatherization Support ticket	New	03-07-2024 06:37:22 PM	
Case Tasks	WSUP00001022		Weather Support	LCRA OPR ROLE USER	Weatherization Support ticket	Open	03-07-2024 06:37:22 PM	
Requests	WSUP00001009		Weather Support	LCRA OPR ROLE USER	Weatherization Support ticket	New	03-07-2024 06:37:22 PM	
	WSUP00001026		Weather Support	LCRA MGR ROLE USER	Hey can you see this?	New	03-07-2024 06:37:22 PM	
	WSUP00001017		Weather Support	LCRA OPR ROLE USER	Weatherization Support ticket	New	03-07-2024 06:37:22 PM	
	WSUP00001010		Weather Support	LCRA OPR ROLE USER	Weatherization Support ticket	New	03-07-2024 06:37:22 PM	
	WSUP00001005		Weather Support	LCRA MGR ROLE USER	Weatherization Support ticket	New	03-07-2024 06:37:21 PM	
	WSUP00001008		Weather Support	LCRA OPR ROLE USER	Weatherization Support ticket	Open	03-07-2024 06:37:21 PM	
	WSUP00001027		Weather Support	LCRA MGR ROLE USER	Weatherization Support ticket	New	03-07-2024 06:37:21 PM	
	WSUP00001013		Weather Support		Weatherization Support ticket	New	03-07-2024 06:37:21 PM	
	WSUP00001030		Weather Support	LCRA OPR ROLE USER	Weatherization Support ticket	New	03-07-2024 06:37:21 PM	

Figure 9: My Lists - Action Needed

My Case Tasks

The My Case Tasks section will display the MPs cure period tasks assigned to them if they have any. If there are none that section will not display any information/data.

ly Lists	≡ My Case Tasks					
All Cases	S All					
Action Needed	Number	Service	State	Assigned to	Subject	
My Cases	CPTSK0001168		Draft		Testing_Summer Inspection_3-14-2024	
My Case Tasks	CPTSK0001170		Draft		Testing_Summer Inspection_3-14-2024	
ly Requests	CPTSK0001169		Draft		Testing_Summer Inspection_3-14-2024	
	CPTSK0001159		In Progress		Demo Task	
	CPTSK0001160		In Progress		Demo Task 2	
	< > Row	s 1 - 5 of 5				

Figure 10: My Lists - My Case Tasks

Completed Submissions

On the "Completed Submissions" page, MPs will be able to see a list of Declarations of Weather Preparedness previously completed and submitted within the portal as well as the associated documents. In the future, MPs will be able to filter this list to review historically submitted Declarations and accompanying information.



Figure 11: Portal header - Completed Submissions

Work Orders

Access to the inspection report will be made available to MPs via the Work Orders tab on the portal header. You can review the reports by selecting the appropriate Work Order associated with the inspection in question. In addition, MPs can communicate with the Weatherization and Inspection team via the 'Activity' section on the Work Order.

ot 🛱								Knowledge Base	My Lists	Completed Submission	Work Orders	LCRA OPR ROLE USER
		Home > Work Order	5			Searc	h Q					
		E Work Orders				Key	word Search Q					
		All > State in (Work In Pro Number A Co	gress, Closed Complete, Clo mpany Location	Parent	Short description	Scheduled start	State					
		W00012335	GIDEON	WZ South Central	Test WO Exposure on Portal		Closed Complete					
	Home > Wor	k Order										
	Number WO0012335							State Closed Complete				
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	Priority 4 - Low	Location GIDEON										
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		12 ND			Number W00012335							
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					Activity	Attachments Wo	rk Order Tasks					
					RPT.00023413.00	00432268853000.2024_RE	_GIDEON_IR.pdf (24.2 KB)					
								44 200				

Figure 12: Portal header - Work Orders

Instructions

Request Role Access from User Security Administrator (USA)

For REs or TSPs to access the new Portal, you will need to request the appropriate role be added to your digital certificate from your company's internal User Security Administrator, or USA. If your company USA is unfamiliar with the process, they can refer to the MPIM Digital Certificate User Guide accessible from the ERCOT.com website. You can navigate here via the following:

- 1) Navigate to ERCOT.com website home
- 2) Select the 'Services' tab > Market Data Transparency > Digital Certificate Security Information
- Navigate to 'Certificate Documentation' and select 'ERCOT Digital Certificate User Guide'

RCOT API Security Changes	May 15, 2019 - pptx - 167.3 KB
PowerPoint slides from WebEx Presentation presented on 05/14/2019	
RCOT Digital Certificate Download Process	Mar 22, 2024 - docx - 315.6 KB
RCOT SSL Communication Standards	Oct 5, 2022 - doc - 290.5 KB
RCOT Digital Certificate User Guide	Apr 14, 2022 - docx - 3.4 MB



Once you have requested and been approved for the role assignment, log into the portal using the provided link.

If a site contact other than the Authorized Representative (AR) or Backup Authorized Representative (BAR) will receive permissions but has not interacted with ERCOT formerly via any of the current ERCOT systems, he/she will need to work with their USA to receive a digital certificate prior to being able to have the associated role assigned to that certificate. Please refer to the ERCOT Digital Certificate User Guide as well as the Required Permissions and Access section of this document for further guidance.



Figure 14: Digital Certificates & Roles steps

Log into ERCOT Weatherization & Inspection Market Participant Portal Once your USA has issued you the appropriate credentials, you will have access to the Market Participant Portal via the below link (in the future, via your MIS login)

Steps:

- 1. Secure appropriate permissions from USA and Log into MP Portal via ERCOT MIS using the provided link:
 - a. <u>https://mis.ercot.com/secure/applications</u>
- 2. Select the appropriate Digital Certificate
- 3. Navigate to the 'Application Library' and select 'Weatherization and Inspection'
- 4. Select the 'Weatherization and Inspection' category
- 5. From here you'll be able to access the ERCOT Weatherization & Inspection MP Portal

Sign in to your acco.	Select a certificate	ficate 2	urself to itestmis.ercot.com	n:443	×
	Subject		Issuer	Serial	^
	LCRA RO ROLE	USER	ERCOT Enterprise T	0A925D734A8410E	
<i>TCOT</i> ♀ Market Inform	aation System			Data Produ	cts Applications Notices
Application Li ese are the applications available base Find ESIID Find Electric Service Identif	aation System 3 brary d on your Digital Certificate's permissions.	Renewable Energy Link to Texas Renewab website.	3y Credits lie Energy Credits (REC)	Units Production and Weatherization and Insported Vertice Vert	Certified d Inspection ection Market Participant
Market Inform Market Inform Application Li ese are the applications available base Find ESIID Find Electric Service Identif	aation System 3 brary d on your Digital Certificate's permissions.	Renewable Energ Link to Texas Renewab website.	3y Credits le Energy Credits (REC)	Usta Produ	cts Applications Notices
Cot ♀ Market Inform Application Li ese are the applications available base Pind ESIID Find Electric Service Identif	aation System 3 brary d on your Digital Certificate's permissions. were (ESI ID) information.	Renewable Energ Link to Texas Renewab website.	1y Credits le Energy Credits (REC)	A Weatherization and Inspe Portal	cts Applications Notices
Market Inform Application Li Search applications available base Market Inform Applications available base Market Inform Applications available base Market Inform Application Li Application Li Appl	anation System 3 brary d on your Digital Certificate's permissions. er (ESI ID) information. 5	Renewable Energy Link to Texas Renewab website.	yy Credits le Energy Credits (REC)	Understanding of the second se	Cettine d Inspection action Market Participant

Figure 15: ERCOT Weatherization & Inspection MP Portal Login

Submitting Declaration of Weather Preparedness Documents

Appendix A

Once you have successfully logged in, you will now be able to submit your Declaration of Weather Preparedness documents (i.e., Appendix A and the Notarized Attestation, as well as Attachment K, Supp to Attachment K for REs that use natural gas as their primary fuel at any of their resources).

To do this, you will:

- 1. From your MP Portal home page, navigate to 'Submissions & Requests'
- From the Categories menu on the left, select the appropriate season (e.g., DoWP RE Summer)
- 3. Select 'Summer Notarized Attestation'
- 4. Navigate to and complete Appendix A submission (*Note If you go to the 'Notarized Attestation' section first or Attachment K sections, you will get an error informing you to first complete your Appendix A submission*)

Figure 16: Error Message - complete Appendix A first

- a. Verify the appropriate year is selected (e.g., 2024). This field is auto-populated so you typically should not have to change this.
 - i. Please note: If is winter and you are an MP who is filing a DoWP late for permissible reasons, the year will be the year the inspection season starts. For example, if you submit a DoWP in January or February of 2025, the winter inspection season for that submission is 2024 as this is the year when the current inspection season began.
- b. Review Resources/Substations to ensure all are present in Appendix A
- c. Update the list and fields as needed. Use the 'pencil' icon to edit and the 'X' icon to delete.
 - i. Note: If you have a large list, you can export this into an excel file at a later step for ease of review. If this is your preference, you may select 'Submit', navigate to the Attestation page, and print to XLS, CSV, or PDF. You can use this method to "red-line" any corrections needed, HOWEVER, all identified updates will need to be made on the Appendix A digital form. You can navigate back to the Appendix A category, make the edits, and re-submit.

RE - Summer - Appendix A				
Appendix A for Summer Generation Resource DoWP		Submit		
Appendix A for Summer Generation Resource Declaration of Weather Preparedness.				
NOTE: When submitting large data sets be prepared for form submission to require a significant amount of time to complete. It 5 minutes.) Do not close your browser or marigate away from the page until you see the message saying that submission wo successful.	(Up ras			
Each entity should submit only one Declaration of Weather Preparedness per season. If you have already submitted for the season, please do not submit additional declarations.				
Account				
0 LOWER COLORADO RIVER AUTHORITY (RE)	*			
1 Season				
Summer				
2024				
	Paraurro Info	rmation (PE Summar)		
	Resource Info	rmation (RE Summer) Remove All		
	Resource Info	rmation (RE Summer) Remove All Generation Resource	Maximum Experienced Ambient Temperature (*F)	If a resource is not covered by this de
	Resource Info Add Actions	mation (RE Summer) Remove All Generation Resource WIPOPA_WPP_G1	Maximum Experienced Ambient Temperature (°F) 108	If a resource is not covered by this de
	Resource Info Add Actions 2 X	Remove All Generation Resource WIPOPA_WPP_G1 BUCHAN_BUCHANG2	Maximum Experienced Ambient Temperature (*F) 108 109	If a resource is not covered by this de
	Resource Info Add Actions X X X X	Remove All Generation Resource WIPOPA_WPP_G1 BUCHAN_BUCHANG2 FERGCC_FERGGT2	Maximum Experienced Ambient Temperature (*F) 108 109 109	If a resource is not covered by this de
	Resource Info Add Actions X X X X X X X X X	Remove All Generation Resource WIPOPA_WPP_G1 BUCHAN_BUCHANG2 FERGCC_FERGGT2 MARSF0_MARSF0G1	Maximum Experienced Ambient Temperature (*F) 108 109 109 109	If a resource is not covered by this de
	Resource Info	Remove All Generation Resource WIPOPA_WPP_G1 BUCHAN_BUCHANG2 FERGCC_FERGGT2 MARSFO_MARSF0G1 INKSDA_INKS_G1	Maximum Experienced Ambient Temperature (*F) 108 109 109 105 109	If a resource is not covered by this de

Figure 17: Appendix A edits

- 5. Submit
 - a. Note: You will see a green banner at the top "Your request has been successfully submitted"

Figure 18: Appendix A submission successful

Attachment K and Supplement to Attachment K (if applicable)

Once you have successfully submitted your Appendix A, proceed to filling out your Attachment K and Supplement to Attachment K forms (If applicable). If you are a TSP, you can skip this section and go to 'Complete Notarized Attestation' step.

 Note: The Supplement to Attachment K form will be filled out on this step as well, if applicable.

To do this, you will:

 From the home page, select 'Submissions & Requests' > DoWP – Summer > Attachment K

oWP - RE - Summer		
<u>RE - Summer - Appendix A</u> Appendix A for Summer Generation Resource DoWP	<u>RE - Summer - Attachment K</u> This form must be filled out by any generation resource relying on natural gas as the primary fuel source.	<u>RE - Summer - Notarized Attes</u> Submit to finalize the Declaration of Weather Preparedness
View Details	View Details	View Details

Figure 19: Attachment K form access

2) In the field labeled 'List Generation Resources' Select the Resources that use natural gas as the primary fuel source

	A
INCHSLR_UNIT1	
RNCHSLR_UNIT2	
RNCHSLR_UNIT3	
EEC_ANTLP_1	
EEC_ANTLP_2	
EEC_ANTLP_3	
EEC_ELK_1	

Figure 20: Attachment K - List Generation Resource(s)

- 3) In the 'Supplement to Attachment K' section:
 - 1) Edit: You can edit the preexisting data to ensure it is correct
 - 2) Add: You can add new resources and pipeline information
 - 3) Remove: You can remove pre-existing items

Add	Remove A			
Actions	Site Code	Does any resource use Natural Gas as Fuel	Generation Resource Primary Contact	Generation Reso
∂ ×	FERGCC	Yes	Reagan Springs	512-730-6904 / 5
/ ×	GIDEON	Yes	Reagan Springs	512-730-6904 / 5
/ ×	WIPOPA	Yes	Reagan Springs	512-730-6904 / 5



- 4) Complete the following sections (3 and 4) listed on the Attachment K form. These will be the same fields and items previously filled out on the "paper/Excel" version of this form.
- 5) Submit
 - 1) Note: You will see a green banner at the top saying:

Your Attachment K has been stored with your previously stored Appendix A. Your next step is to prepare a Notarized Attestation document. When you submit the completed Declaration of Weather Preparedness, your most recently stored Appendix A, Attachment K, and Supplement to Attachment K (if applicable), will automatically be combined with your Notarized Attestation document to form the complete Declaration of Summer Weather Preparedness. Final Declaration

Your Attachment K has been stor	red with your previously stored Appendix A. Your next step is to prepare a Notarized Attestation document. When you submit the completed Declaration of Weather Preparedness, your most recently stored Appendix A,
---------------------------------	---

Figure 22:Attachment K submission complete

Complete Notarized Attestation

Once you have successfully submitted your Appendix A, Attachment K, and Supplement to Attachment K forms, proceed to the final step: completing the Notarized Attestation. You can use the link provided in the green banner (prior step) or navigate from the home page.

To do this, you will:

- 1. From the home page, select 'Submissions & Requests' > DoWP Summer > Notarized Attestation
 - a. Note: You will only be able to submit this document once you have completed the previous documents (i.e., Appendix A, Attachment K, etc.)

RE - Summer - Appendix A Appendix A for Summer Generation Resource DoWP	<u>RE - Summer - Attachment K</u> This form must be filled out by any generation resource relying on natural gas as the primary fuel source.	<u>RE - Summer - Notarized Attes</u> Submit to finalize the Declaration of Weather Preparedness
/iew Details	View Details	View Details

Figure 23: Notarized Attestation submission

- 2. If you would like to perform a more exhaustive review of your documents (i.e., Appendix A and/or Attachment K), you may download them here by selecting one or all the hyperlinks.
- 3. Download the respective documents, particularly the Resource/Substation Declaration for review and notarization by the "highest-ranking representative, official, or officer with binding authority..."
 - a. For exact instructions on how to download these documents, please see the next section "Document Export & Review".

RE – Summer – Notariz Complete and Submit this form to finish the D	eclaration of Weather Preparedness (DoWP) process
L. Download this document Summer-Resource- 2. Print out your previously submitted Appendia	Declaration.pdf «A (Optional)
 Appendix A Resource Line Data Attachment K Data Supplement to Attachment K Data 	
3. Obtain notarized signatures.	-

Figure 24: Notarized Attestation - Download documents

- 4. Print out the Attestation for review by the "highest-ranking representative..."
- 5. Obtain notarization and signature on the Attestation form
 - a. If needed, you can print out the other items identified in Step 2 of the screenshot to provide a complete "package" for review (i.e., Appendix A Resource Line Data, etc.)
- 6. Scan the signed and notarized Attestation
- 7. Upload the Notarized Document

	Ψ
count	
	Ψ.
ason	
None	Ψ.
ar	
None	Ψ.
Notarized Document	
• Upload	

Figure 25: Notarized Attestation - Upload Document

8. Upload any supplemental documents you would like to provide in support of your Declaration of Weather Preparedness

⊙ ∪pload		
		Add attachments

Figure 26: Notarized Attestation - upload supplemental documents

- 9. Submit
 - *a.* Once you press the submit button, you will be asked if you are sure you want to submit and provided the option to continue with the submission or cancel.



Figure 27: Final Declaration confirmation warning

b. Once you press the OK button, you will see a green banner at the top of the page saying *Thank you for submitting your Declaration of Weather Preparedness. You have completed the process. You can view your submission from "My Lists".*

Thank you for submitting your Declaration of Weather Preparedness. You have completed the process. You can view your submission from "My Lists".

Figure 28: Declaration of Weather Preparedness submission complete

c. In the event you have made a submission in error or need to make some update in the future, the MP will need to create a Weatherization Support Case (described below) describing the situation. Upon determination that a resubmittal is appropriate, the W&I Team can re-open the Summer Declaration catalog item and allow for an additional submission.

Document Export & Review



Figure 29: Document Export & Review process

Correspondence with Weatherization and Inspection Team

Open a Weatherization Support Case

In the past, the Weatherization and Inspection (W&I) Team has communicated with Market Participants via Email. We will be taking this communication into our Portal environment.

If you have a question or concern for the W&I Team, you can create a weatherization support case, which we will attempt to address within 2-3 business days. The fields with a red asterisk next to them are required prior to making the submission. This is the minimum information needed to understand you request.

* Indi	icates required
Conta	ict
0	LCRA MGR ROLE USER
Accou	unt
0	LOWER COLORADO RIVER AUTHORITY (RE)
* Whie	ch of the following is your issue related to?
No	vine
* Plea	ise explain the issue you are experiencing

Figure 30: Weatherization Support case

Support cases can be created from the Portal via the 'Submissions & Requests' function on your home page.

t Portal		Weatherization Support General Support Case for Weatherization
and B. State and S. State	Maria and Anna and An	 Indicates required
Submissions & Pagu	Aste Myliste	
Contact support to make a r	equest, or report Access my lists to stay up to date on	Long mon note open
a problem.	submissions and activity.	LOWER COLORADO RIVER AUTHORITY (RE)
1	1	* Which of the following is your issue related to?
		None *
		- None - * Please explain the issue you are experiencing
e > Customer Service >	Support	- None - Please explain the issue you are experiencing
e > Customer Service >	Support	- None - * Please explain the issue you are experiencing Add attachment
e Customer Service >	Support Support Weatherization Support	- None - * Please explain the issue you are experiencing Add attachment
e Customer Service >	Support Support Weatherization Support General Support Case for Weatherization	- None - • Please explain the issue you are experiencing Add attachment
e Customer Service Regories WP - RE - Summer WP - RE - Winter	Support Support Weatherization Support General Support Case for Weatherization	- None - • Please explain the issue you are experiencing

Figure 31: Weatherization Support case navigation

Notice of Inspection

Accept and Approve

Once you have completed your Declaration of Weather Preparedness submission (by June 1st or December 1st), the W&I Team will review the submissions and begin scheduling inspections for the upcoming season. Notices of Inspection may be sent to MPs that have not submitted a Declaration of Weather Preparedness.

Previously we have notified Market Participants via an Outlook email, however, we will now be utilizing the MP Portal to generate an email which, when received, will need to be responded to within the portal.

Steps:

- 1. You will get a notification in your email to log into your MP Portal
 - a. Note: If you are not an AR/BAR, they will be responsible for forwarding you the link to the respective NOI acknowledgment form to be completed. Please be aware that to access this link you will need the appropriate digital credential and role assignment. Work with your User Security Administrator (USA) to receive these.
- 2. Log into the ERCOT Weatherization & Inspection Market Participant Portal in order to acknowledge the NOI.
- 3. Click the Email link to be taken to the acknowledgment form.
- 4. Complete the button ('Accept') and this will confirm your inspection date.

ercot		
o the Authorized Representative of Company Name: LOWER COLORADO RIVER AUTHORITY (RE),		
accordance with the Public Utility Commission of Texas (PUCT) rule regarding Weather Emergency Preparedness, 16 Texas dministrative Code (TAC) § 25.55, ERCOT notifies you it will perform an inspection of the following Generation Resources beginning at 5-Mar-2024 08:00.		
his inspection will assess compliance with 18 TAC \$ 25.55. Your inspector(s) will be: Audie Proctor		
lease note, as provided in 16 TAC § 25.55(d)(1)(A), PUCT personnel may accompany ERCOT's inspectors during the inspection. ease continum receipt of this notes and provide the following information within 24 hours of receiving this notee by acknowledging pur voltoxe of inspection clicking <u>heur</u> s.	Home > Acknowledge Notice of Inspection	Sea
Acknowledge your plant staff has been advised to expect the ERCOT inspectors at the time and date indicated above; The name of an individual to meet the ERCOT inspectors and the 24-hour phone number at which the ERCOT inspectors may reach the designated contact person; The physical address of the Resource facility and driving directions; and Any personal safety, personal protective equipment (PPE), security, or other requirements for the inspectors to access the site and conduct the inspection.	Indicates required This Notice of Inspection has already been acknowledged or your inspection has already been completed. Thank Weatherization Team. Return to Portal Inspection Number ()	rou, ERCOT
you need to contact the inspectors for any reason, please ???	W00012365	
RCOT requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for ne meeting at the site.	* Account	
RCOT requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for in meeting at the site.	* Account O LOWER COLORADO RIVER AUTHORITY (RE)	x *
RCOT requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for in meeting at the site.	* Account Cover Could Read Rever Authority (RE) Inspection Location research	x v
RCOT requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for meeting at the size of the second	* Account Content CollORADO RIVERAUTHORITY (RE) Inspection Location FEROCC	x v
RCOT requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for meeting at the specific provides that are not increased on the specific provide and available for the base memory of the specific provides related on the specific provide and available for the base memory of the specific provides related on the specific provide and available for the base memory of the specific provides related on the specific provides and available for the specific provides the specific provides related on the specific provides and available for the specific provides the specific provides related on the specific provides and the specif	* Account C LOWER COLORADO RIVERAULTHORITY (RE) Inspection Location FEROCC Inspection Date Is a context and proce	x *
RCOT requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for meeting at the site.	* Account C LOWECOLORADO RIVERAUTHORITY (RE) Inspection Location FEROCC Inspection Date 15-Mar-2024 at 08:00	x *
RCD requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for meeting at the site.	* Account C LOWER COURAND RIVERAULTHORITY (RE) Inspection Location FERGCC Inspection Date 15-Mar-2024 at 08:00 Inspector Avida Boston	x *
RCO requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for meeting at the site.	* Account C LOWER COURAND RIVERAULTHORITY (RE) Inspection Location FEROCC Inspection Date 15-Mar-2024 at 08:00 Inspector Audie Proctor	× ×
RCD requests that representatives meeting ERCOT inspectors in person have all necessary documentation prepared and available for meeting at the site.	*Account C LOWECOURADO RIVERAUTHORITY (RE) Inspection Location FEROCC Inspection Date Location Audie Proctor Audie Proctor *Accept Inspection Date Netter	x ×

Figure 32: Notice of Inspection (NOI) - Email and form

Once Accepted, additional fields will be available to complete details necessary for the upcoming inspection. Required fields are indicated by a red asterisk.

Accept	
The name of an individual to m	eet the ERCOT inspectors
The email at which the ERCOT in	spectors may reach the designated contact person
The 24-hour phone number at t	which the ERCOT inspectors may reach the designated contact person
Physical address of facility to be	inspected
Supplemental driving directions	o facility to be inspected
onduct the inspection	otective equipment (PPE), security, or other requirements for the inspectors to access the site and

Figure 33: Notice of Inspection Form Questions

Request Alternative Inspection Date

The second option within the "Accept Inspection Date" drop down is "To Request An Alternative Inspection Date." These requests will only be accepted for unique circumstances. The decision to accept an alternative date request will be determined by the W&I Leadership Team on a case-by-case basis. If you have been assigned an inspection and you have not completed all of the appropriate commissioning process steps, please select this option and provide details around your particular circumstance.

Inspection Report Availability

Communication Regarding Inspection

If correspondence with the MP needs to occur before the inspection report is received, you can access open work orders here ("Work in Progress") and ask your question or submit a message via the Activity stream. A member of the Weatherization and Inspection Team will see these and be able to respond accordingly.

In addition, an inspector may send a message indicating what documentation they will be looking for or what should be available on the day of inspection. This is done to ensure the MP has time to collect the appropriate documentation prior to the inspection and ensure a more seamless inspection process.

= Work Ord	ers					Keyword Sea	arch Q
All > State in (Work in Progress, Closed Complete, Closed Incomplete)							
Number 🔺	Company	Location	Parent	Short description	Schedu	led start	State
WO0010216		INKSDA	WZ West	Inspection Summer 2023_INKSDA			Work In Progress

Figure 34: Communication on Work Order

nspect	ion Summer 2023_INKSDA	
Priority 4 - Low	Location INKSDA	
Activity	Attachments Work Order Tasks	
	Type your message here	Ç Post 🖉
	LCRA MGR ROLE USER	⊙9h ago • Additional comments

Figure 35: Communication on Work Order Activity section

Work Order Completion – Inspection Report Availability

Once the inspection has been completed, the Weatherization Inspector will summarize the findings of the inspection in a final inspection report that will be reviewed by other ERCOT personnel and then be made available in the MP Portal under Work Orders (may change to Inspection Reports in near future) in the top right corner.

If there are follow-up questions or concerns, an MP can create a Weatherization Support Case and we can address them at that point.

ERCOT Weatheriza	tion & Inspection	Knowledge Base	My Lists	Completed Submissions	Work Orders	CRA MGR ROLE
Market Participant	Portal	Marriel Constant of Constant	5 4	**************************************		
Knowledge Base Browse, search, and rate articles,	Submissions & Requests Contact support to make prequest, or report a problem.	My Lists Access my lists to stay up to submissions and activity.	date on	+/	for some so	
WSUP00001005 New • Weatherization Support ticket • • LCRA MGR ROLE USER	No content to display	This should be visible to MPs				
WSUP00001006 New+Weatherization Support ticket++ROLE USER	Featured Articles	Test News Article 25d ago				
WSUP00001008 Open • Weatherization Support ticket •• ROLE USER	■ Friepare for Hurricane Bert KB0012225 + 66 Views + 19d ago + オオオオオ	This is the news				

Figure 36: Access inspection report via Work Order section on portal header

Priority 4 - Low	Location FERGCC	
Activity	Attachments Work Order Tasks	
		1
	System	🕑 a day ago
Ů	RPT.00023413.0000432268853000.2024_RE_FERGCC_IR.pdf 23.9 KB	
	Brandon Manley	

Figure 37: Inspection Report location

Cure Periods

In the event Rule compliance deficiencies are found that cannot be resolved within 3 business days, a cure period will be determined by ERCOT and assigned. Identified deficiencies that need to be "cured" will be available for view on the issued Inspection Report.

In addition, the market participant will be required to report semi-monthly status updates on each assigned cure period. These updates will be provided within the wCSM portal.

When a cure period is issued, an inspection report will still be issued, however, the cure period items identified, item number, and deadline will be provided as part of the report.

Your Power. Our Promise.	270 Tay T.S. F.S	15 West Lake Dr. Aar, Texas 76574 12-248-3000 12-225-7079	8000 Metro Bldg. E, Sui Austin, Tex T : 512-225-7 F : 512-225-7
	PROTECTED INFORMATION		
	ERCOT Summer 2024 Weatherization Inspection Report		
Authorized Represent	tative,	14 1	Mar 2024
On 03-14-2024, ERC Texas Administrative	OT representatives inspected the following generation resource Code (TAC) § 25.55(c)(2).	ces for compliance	e with 16
Resources Inspected:			
FERGCC_FERGGT2	, FERGCC_FERGGT1, FERGCC_FERGST1		
resource complied wi that subsection, it mu: At the end of the third item(s) not in complia	th $\$$ 25.55(c)(2). If ERCOT considers the Generation Entity (st provide a reasonable time to cure any deficiency. It business day following the day of your inspection, ERCOT of ance with $\$$ 25.55(c)(2):	GE) not in compli	ance with lowing
Item No.	Deficiency Description	Cure Des	Period Idline
Item No. CPTSK0001168	Deficiency Description Testing_Summer Inspection_3-14-2024 Cure Period Assig for no trained personnel as of June 1st.	gned 2024-0	Period adline
Item No. CPTSK0001168 CPTSK0001169	Deficiency Description Testing_Summer Inspection_3-14-2024 Cure Period Assig for no trained personnel as of June 1st. Testing_Summer Inspection_3-14-2024 Cure Period Assig for no trained personnel as of June 1st. Second one.	ined 2024-0	Period adline 14-14

Figure 38: Cure Period Inspection Report

The assigned cure period items identified in the inspection report can be viewed from the MP Portal. In addition, this is where semi-monthly updates will be provided.

These tasks are made viewable in two different locations: on the home page and via My Lists on the portal header. If you are on the home page and have been assigned cure period tasks, you will see them under the "Tasks" widget.

Cases	Most Useful Articles	News
NOI00001072 New • Request Alternate Inspection Date for MCDLD on 17-Mar-	No content to display	This should be visible to MPs i 2mo ago
	Featured Articles	Test News Article
NO100001146 Open + Accepted Inspection Date for ABBOTT on 11-Apr-2024 at 10:26 + ABBOTT + ONCOR MGR ROLE USER	Prepare for Hurricane Bert KB0012225 • 7 Views • about a month ago • ★★★★☆	■ 2mo ago This is the news ■ 2mo ago
NOI00001148 Open • Accepted Inspection Date for on 28-Apr-2024 at 04:00 • •		Prepare for Hurricane Bert
Chris Rowley	Most Read Articles	iiiii omo ago
WSUP00001004 New • Weatherization Support ticket • • ONCOR OPR ROLE USER	Prepare for Hurricane Bert KB0012225 • 7 Views • about a month ago •	¶ ³ Announcements
WSUP00001021 New • Weatherization Support ticket • • ONCOR OPR ROLE USER	Emergency Procedures	No information available
First 5 of 13 View all		
Tasks	Electarations of Weather Preparedness KB0012242 + 2 Views + about a month ago ・ たたたたた	
CPTSK0001162 QA Test Automation • In Progress •	GE - Submit Declaration of Preparedness KB0012245 • 1 View • about a month ago •	
CPTSK0001163 QA Test Automation • In Progress •	다 가 가 가 가 가 가 가 가 가 가 가 가 가 가 가 가 가 가	
	KB0012235 ・ 1 View ・ 2mo ago ・★★☆☆☆	

Figure 39: Cure Period Tasks - Home page

If you decide to navigate to your cure period tasks via the "My Tasks" portal header section, you will be able to see the additional details as well as provide your semi-monthly updates.

Home > My Lists			Search		٩	
My Lists	≡ My Case Tasks					
All Cases	S All					
Action Needed	Number	Subject	Contact	Account	State	
My Cases	CPTSK0001080	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh	Account	In Progress	
My Case Tasks	CPTSK0001079	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	
My Requests	CPTSK0001078	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	
	CPTSK0001077	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	
	CPTSK0001076	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	
	CPTSK0001075	CURE PERIOD TEST - HILDA AGOPIAN	Dave Marsh		In Progress	

Figure 40: Accessing Cure Period Tasks from My Tasks

Once you've selected the cure period task (CPTSK), you will be able to provide your semimonthly updates via the Activity stream on that task. The W&I team will see these updates and will communicate as appropriate. If there are attachments that the MP wants to submit, they can attach them with their update. Once the semi-monthly update for each of their cure period tasks in the Portal have been provided, the current update is complete.

Please be aware that MPs need to provide updates to their cure period tasks no later than the 15th and the last day of the month until their compliance deficiency has been remedied and the cure period has been successfully closed.

CP1540001120		braft	
QA Test Automation			
Cented Der GOLDEN SPREAD ELEC Dave Marsh Iss	origtion at needs to be resol		
Activity Attachments Linked request			
This is my update for the current period on the cure pe steps taken.	riod task. We are on track for closing this and attached it	document outlining the Post Ø	
Dave Marsh 1618, BE Summer DuMP Reminder 2 days before do	x		
Brandon Manley			Knowledge Base MyLists
CPT3H0001126 Created		Norm 3 Readed Toket	5m
See		QA Test Automation	Ave.
Task details		Deputy Select Deputy SD301990000000 Date Stands SD301990000000000000000000000000000000000	
Number CPT560001126	State Draft	Adday attachments Latitud report	
COMPANY COLDEN SPREAD ELECTRIC COOPERATIVE INC (RE)	Contact Dave Marsh	Typ your measurement.	1
		The set of many set of the surver period on the core period task. The are not task for diary that and attached is a discovered within the sing task. Topor March	
		144, 24 Samor 2000 Resider 2 days before data 144-0	
		Dandon Marky Ottomore	

Figure 41: Cure Period communication on bi-monthly updates

Appendix

Definitions

Case Types

- CPTSK Cure Period Task case type
- DOWP Declaration of Weather Preparedness case type
- NOI Notice of Inspection case type
- WSUP Weatherization Support case type

Contact Information

ERCOT Account Manager or ERCOT Client Services	Phone: (512) 248-3900 Email: <u>clientservices@ercot.com</u>

More Information

Digital Certificate User Guide – Market Participant Identity Management (MPIM) This document provides Market Participant (MP) USER Security Administrators (USA's) with information regarding the process of receiving their Digital Certificates and serves as a reference tool to navigate through the Market Participant Identity Management (MPIM) features.

This USER's Guide provides a general overview of the process for obtaining and handling Digital Certificates. If any conflict exists between this USER's Guide and the ERCOT Protocols, then the ERCOT Protocols shall prevail. Please refer to the ERCOT Protocols "USER Security Administrator and Digital Certificates", Section 16, regarding complete details of USA responsibilities.

MPIM_Digital_Certificate_User_Guide

https://www.ercot.com/services/mdt/webservices

Summer Weather Readiness

This page provides information on Summer Weather Readiness efforts. ERCOT will periodically add pertinent material.

https://www.ercot.com/gridinfo/generation/summerready

Winter Weather Readiness

This page provides information on Winter Weather Readiness efforts. ERCOT will periodically add pertinent material.

https://www.ercot.com/gridinfo/generation/winterready