



ERCOT

RFI Portal in RIOO —Batch Zero Verification

User Guide for Transmission Service Providers (TSPs),
Distribution Service Providers (DSPs), and Load Entities (ILLEs)

Version 1.1

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ERCOT Public

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1. Overview

1.1 Background

ERCOT has issued a Request for Information and Production (RFI, referred to as the Verification RFI) as part of the Batch Zero Eligibility Verification process. The Verification RFI is administered through the RFI Portal in RIOO (the ERCOT online portal) and requires Interconnecting Transmission Service Providers (TSPs), Interconnecting Distribution Service Providers (DSPs), and Load Entities to provide information about their Large Loads that are conditionally classified for inclusion in Batch Zero as either base load or studied load under ERCOT Planning Guide, Section 9.

This is being issued to all Large Loads that were conditionally classified on the list distributed to TSPs on Thursday, September 3, 2026, where the conditional classification was one of the following:

- Base Load – Included in May 2026 QSZ/IVRT or earlier per ERCOT Planning Guide § 9.2.1.1(1)(c)
- Base Load – Included in Permian Reliability Plan per Planning Guide § 9.2.1.1(1)(d)
- Base Load – Advancing Large Load per Planning Guide § 9.2.1.1(1)(e)
- Base Load – Committed Large Load per Planning Guide § 9.2.1.1(1)(f)
- Base Load PURA §39.169 Net Metering Load per Planning Guide § 9.2.1.1(1)(g)
- Studied Load – Firm per Planning Guide § 9.2.1.1(1)
- Studied Load – PCLR per Planning Guide §§ 9.2.1.1(1), 9.2.2.1
- Studied Load – WLPUN per Planning Guide §§ 9.2.1.1(1), 9.2.2.2

1.2 Document Purpose

This guide explains how TSPs, DSPs and Interconnecting Load Entities (Load Entities) can access the RFI Portal in RIOO, respond to an assigned Verification RFI, invite other contacts, submit attestations, and communicate with ERCOT through the Message Center.

This guide is specific to using the RFI Portal in RIOO to respond to the Verification RFI. For questions regarding the specific questions and content in the Verification RFI, please email LargeLoadVerification@ercot.com.

1.3 Who This Guide Is For

Role	Abbreviation	Responsibilities in RIOO
Transmission Service Provider	TSP	Receives the Verification RFI from ERCOT. Invites DSP and Load Entity contacts. Answers TSP-assigned questions, uploads supporting documents, provides their attestation, reviews all responses and submits the fully completed Verification RFI to ERCOT.
Distribution Service Provider	DSP	Invited by TSP. Answers DSP-assigned questions, uploads supporting documents, provides its attestation, and submits their section to the TSP for submission.
Load Entity	LE	Invited by TSP. Answers Load Entity-assigned questions, uploads supporting documents, provides its attestation, and submits their section to the TSP for review and submission.

2. Getting Access to the RFI Portal in RIOO

2.1 Getting Access — TSP

All TSP employees who require access to the RFI Portal in RIOO must request access to RIOO through the TSP's ERCOT User Security Administrator representative. Access is set up through the RIOO registration process managed by ERCOT.

For instructions on how to sign up for RIOO Services as a TSP, refer to the official ERCOT guide:

TSP Sign-Up for RIOO Services: <https://www.ercot.com/files/docs/2022/01/14/TSP-Sign-Up-for-RIOO-Services.pdf>

Note: Contact your ERCOT User Security Administrator representative if you have questions about the TSP registration process or if you are unable to access the sign-up guide.

2.2 Getting Access — DSP and Load Entity

DSPs and Load Entities are granted access to the RFI Portal in RIOO by invitation:

- The TSP adds one or more contracts for Individual representatives of the DSPs and Load Entities. When a DSP or Load Entity has more than one Verification RFI, registration is only required once for each email address. Once an account is created, the contact can log in directly and review or edit all assigned RFIs at any time.
- When the DSPs and Load Entities contacts are invited by the TSP, they will receive an email. If the DSP or Load Entity contact is a new user in RIOO, then it will receive two emails:
 - The first email is an invitation email directing the contact to the Verification RFI.
 - The second email is a verification and change-password email allowing the contact to set their password and complete your registration.

Note: Registration and password reset links expire 5 days after they are issued. If your link expires before you accept the invitation, please contact to servicedesk@ercot.com to re-send the invitation notification.

- To register:
 - Open the verification email.
 - Click the link to set your password.
 - Create a new password following the on-screen requirements.
 - Once registered, return to the RIOO login page: <https://sa.ercot.com/rioo-rs/>
 - Log in using your email address and new password.

Note: Registration only needs to be completed once. After your account is created, you can log in directly at any time.

3. Logging In

3.1 Login Screen

Navigate to the RIOO login page at <https://sa.ercot.com/rioo-rs/> — You will see the ERCOT RIOO Services login screen.

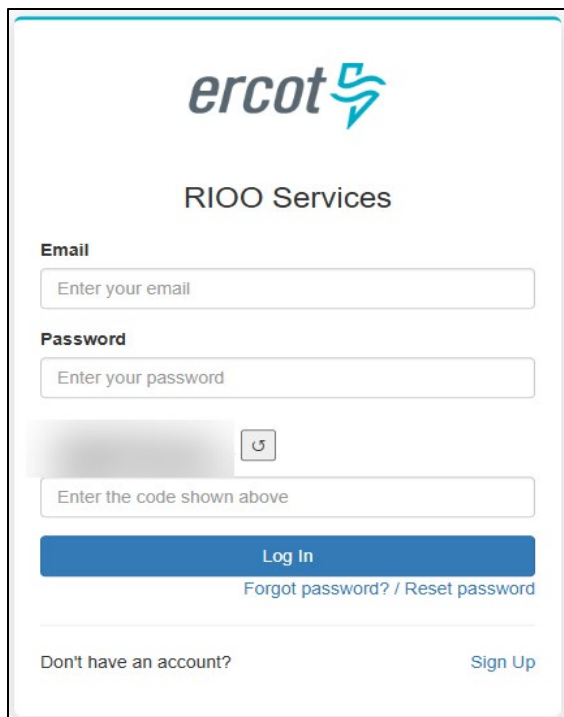


Figure 1 — RIOO Services Login Screen

To log in:

- Enter your registered email address in the Email field.
- Enter your password in the Password field.
- Enter the CAPTCHA code shown in the image into the 'Enter the code shown above' field. If the code is difficult to read, click the refresh button (↺) to generate a new one.
- Click Log In.
- You will be prompted to complete Multi-Factor Authentication (MFA). Enter the one-time code from your SMS text message or Google Authenticator app, then click Verify to complete the login.

Note: MFA is required every time you log in. The one-time code is delivered via SMS to your registered mobile number or through the Google Authenticator app — it is not sent by ERCOT. If you are unable to receive your MFA code, contact your company's IT administrator.

3.2 Resetting Your Password

If you have forgotten your password, click [Forgot password? / Reset password](#) below the Log In button. Enter your email address and follow the instructions in the reset email you receive.

Note: If you do not receive a reset email within a few minutes, check your spam/junk folder.

Note: Registration and password reset links expire 5 days after they are issued. If your link expires before you accept the invitation, please contact to servicedesk@ercot.com to re-send the invitation notification.

4. Your RFI Dashboard

After logging in, you will be taken to the RFI Dashboard. This page shows all Verification RFIs that ERCOT or the TSP has assigned to you. TSPs will see all loads for which they are the responsible TSP. DSPs and Load Entities will see only the Verification RFIs they have been invited to participate in by the TSP.

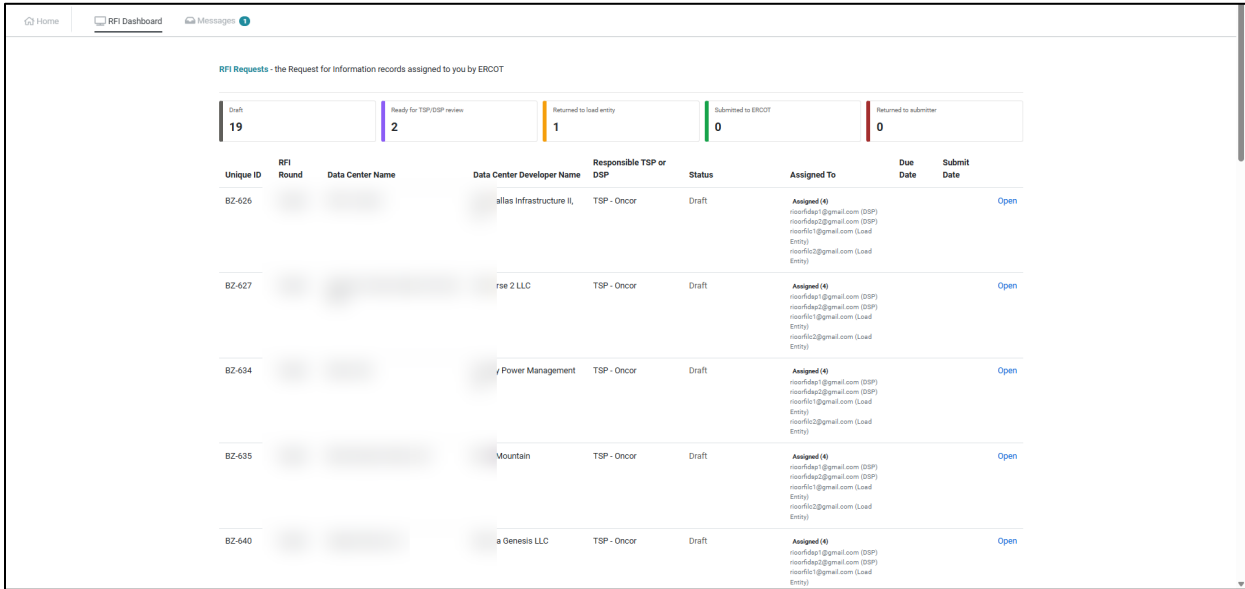


Figure 2 — External User Verification RFI Dashboard (Project names redacted)

4.1 Status Tiles

At the top of the dashboard, five status tiles show the number of your Verification RFIs in each stage:

Status	What it means
Draft	The Verification RFI has been issued and is awaiting the responses from all required parties.
Ready for TSP Review	The Load Entity and DSP have submitted their sections. The TSP is reviewing and ensuring completeness before submitting it to ERCOT.
Returned to Load Entity	The TSP has returned the Verification RFI to the Load Entity for possible correction.
Submitted to ERCOT	The TSP has submitted the completed Verification RFI to ERCOT for review.
Returned to Submitter	ERCOT has returned the Verification RFI to the TSP for possible correction.

4.2 Verification RFI List Table

Each row in the table represents one Verification RFI. The columns show:

Column	Description
Unique ID	The Batch Zero identifier for this load (e.g., BZ-626).

Column	Description
RFI Round	Whether this is the first Verification RFI (Original) or a Follow-up Verification RFI.
Project Name	The name of the project or facility that is the subject of the specific Verification RFI.
Developer Name	The developer or company associated with this project or facility.
Responsible TSP or DSP	The TSP responsible for submitting this Verification RFI to ERCOT.
Status	The current status of this Verification RFI (see Section 4.1 Status Tiles).
Assigned To	The contacts who have been invited to this Verification RFI, shown with their role (DSP, Load Entity).
Due Date	The deadline by which the completed Verification RFI must be submitted to ERCOT.
Submit Date	The date the Verification RFI was submitted to ERCOT (blank if not yet submitted).
Open	Click Open to open the Verification RFI to begin, continue or review your response.

5. Opening a Verification RFI

From your Dashboard, click Open on any Verification RFI row to open it. The first screen you will see is the Instructions section. Read the instructions carefully before starting your response — they explain what ERCOT requires from you, the deadline for submission, and what to do if information is not available.

General Instructions:

- STOP. Before you continue, please confirm you have added an ILLE contact and, if different from the Interconnecting TSP, a contact for the Interconnecting DSP.
- The Interconnecting Transmission Service Provider (Interconnecting TSP) must submit the response to the Request for Information (RFI) to ERCOT within 10 business days of ERCOT's issuance of the RFI. The Interconnecting TSP may request a 5-Business Day extension by emailing ERCOT at LargeLoadVerification@ercot.com.
- If the Interconnecting Large Load Entity (ILLE, also referred to as Load Entity on RFO) fails to provide information and/or supporting documentation necessary for the Interconnecting TSP to timely submit a completed response to this RFI, the Large Load may be removed from the Batch Zero Process.
- Customer-specific information submitted to ERCOT by the Interconnecting TSP pursuant to this RFI is considered Protected Information under ERCOT Protocols § 1.2.1.1(1)(c) (Items Considered Protected Information). Any information submitted directly to ERCOT pursuant to this RFI by the ILLE may not qualify as Protected Information and therefore could be subject to public disclosure.
- If you have any questions about the substance of the RFI, please submit them to LargeLoadVerification@ercot.com.
- If you have any technical questions about or issues using the RFO platform, please submit them to servicedesk@ercot.com.
- Please review Planning Guide Revision Request (PGR) 145 and Planning Guide Section 9 for assistance in answering the RFI. PGR 145 is accessible at <https://www.ercot.com/mkt/rules/issues/PGR145#keydocs>.
- Capitalized terms used in the RFI are defined either within the RFI, Planning Guide Section 9, or Protocol Section 2.

Document Submission Instructions:

- Any documentation that is requested by ERCOT or referenced in or relied upon by the ILLE or Interconnecting TSP or DSP in an RFI response must be submitted pursuant to this RFI even if you previously submitted the document to ERCOT. DO NOT state in an RFI that you have already submitted such document.
- Any documentation provided pursuant to the RFI must be submitted as individual, paginated exhibits and saved as search-capable electronic files (Word, PDF, Excel, etc.). Each exhibit should be identified as Exhibit A, Exhibit B, Exhibit C, etc. using the following file naming convention:
 [BZNumber].[Submitter].[ExhibitIdentifier].VerificationRFI[YYYYMMDD]
 Ex: 829999_ILLE_ExhibitA_VerificationRFI_20260817
 Ex: 829999_TSP_ExhibitA_VerificationRFI_20260817
 Ex: 829999_TSP_ExhibitB_VerificationRFI_20260817
 -
 The "BZNumber" is the unique identifier assigned to the Large Load Interconnection request.
 "Submitter" should be "ILLE," "TSP" or "DSP" depending on which entity submitted the document.
 "Exhibit Identifier" is the chronological identification of the exhibits.
- Prior to submission of the RFI response, the ILLE and Interconnecting TSP or DSP shall separately maintain an exhibit list for each document the submitter respectively provided, referenced, or relied upon in their response to the RFI.
- The exhibit list must reflect the following format, incorporating the required file naming convention addressed above, examples provided:

Example for the ILLE:

Exhibit
 Identifier Submitter Title of Supporting Document File Name of Supporting Document
 A ILLE Executed property deed 829999_ILLE_ExhibitA_VerificationRFI_20260817
 B ILLE Financial Security 829999_ILLE_ExhibitB_VerificationRFI_20260817

Exhibit
 Identifier Submitter Title of Supporting Document File Name of Supporting Document
 A Interconnecting TSP Executed property deed 829999_TSP_ExhibitA_VerificationRFI_20260817
 B Interconnecting TSP Financial Security 829999_TSP_ExhibitB_VerificationRFI_20260817

- For each document provided pursuant to, referenced in, or relied upon for an RFI response, the ILLE and Interconnecting TSP or DSP must include the following information in said response: (1) the Exhibit Identifier, (2) the document file name, and (3) the specific page number(s) supporting the response, if applicable.
- Example: See 829999_ILLE_Exhibit A_VerificationRFI_20260817 at pages 10-14.

The RFI requires:

- The ILLE submit an attestation, like the form attestation provided on the ERCOT Large Load Integration page, that is executed by an official, officer, or other authorized person with authority to bind the ILLE, and
- The Responsible TSP/DSP submit an affidavit, like the form affidavit provided on the ERCOT Large Load Integration page, that is executed by an official, officer, or other authorized person with authority to bind the Interconnecting TSP.

[Continue](#)

Figure 3 — Instructions section when opening a Verification RFI

5.1 Left Navigation Menu

The left navigation menu lists every section in the Verification RFI. The sections you see for each Verification RFI depend on the Large Load's conditional classification designated by ERCOT in Batch Zero as outlined in Section 1.1 Background above. Common sections include:

Navigation item	What it contains
Instructions	The rules and requirements for completing this Verification RFI. Read before starting.
Sections (e.g. Section SC, Section FS...)	Questions about site control, financial security, etc. Each section is assigned to a specific role (ILLE, DSP or TSP). The Sections and questions in each Section vary by the conditional classification in Batch Zero.
Contacts	Invite or view the DSP and Load Entity contacts added to this Verification RFI.
Attestation	Each participating party (ILLE, DSP, and TSP) is required to complete a notarized attestation. Upload your company's attestation file in the designated Section before submitting.
Review	Check that all sections are complete and submit your response.
Message Center	Send and receive messages with ERCOT and other contacts on this Verification RFI.

5.2 Key Points from the Instructions

- Each Load Entity must complete and submit a separate response for each data center or facility with a conditional classification designated by ERCOT in Batch Zero as outlined in Section 1.1 Background above.
- Respond to all questions in each section assigned to your role. If information is not available or not applicable, state so and explain why.
- Provide all supporting documentation where requested.
- All information submitted will be treated as confidential to the extent permitted by law.
- Responses are due within 10 business days of issuance. A 5-day extension may be requested from ERCOT through your TSP.
- If the Load Entity fails to provide information and/or supporting documentation necessary for the TSP to timely submit a completed response to this Verification RFI, the Large Load may be removed from the Batch Zero Process.

From the Instructions, click **Continue** to move to the first section of the Verification RFI.

6. Contact Invitation and Coordination

Using **Invite Contacts** or from **Contacts** on the left-side Navigation, the responsible TSP, is obliged to invite the appropriate DSP and/or Load Entity to complete their portions of the Verification RFI including submitting their Attestations. Invited contacts receive an email with a sign-in link and access limited to this Verification RFI response (and others if they have been assigned to the same email account).

Once a DSP and/or Load Entity is assigned to a Verification RFI, they can use **Invite Contacts** to invite others, as needed, to review and/or assist with completing their sections of the Verification RFI.

TSP employees cannot be added using the Invite Contacts method. All TSP employees who require access to the RFI Portal in RIOO must request access to RIOO through the TSP's ERCOT representative. Access is set up through the RIOO registration process managed by ERCOT ([see Section 2.1 above](#))

All Contacts invited to participate in the Verification RFI can provide information and upload documents in the Sections assigned to their role, but only the TSP can submit the completed Verification RFI response to ERCOT.

6.1 Understanding the Contact Workflow

- The TSP is obliged to invite the ILLE and DSP contacts to complete their sections of the Verification RFI (see Section 6.2 for instructions).
 - Note: All invited contacts can view the entire Verification RFI, but each contact will only be able to answer the sections and questions within the Verification RFI that are assigned to their role. If communication related to the Verification RFI is required between the assigned parties, they can use the Message Center (see Section 9 below) to assist in directing contacts to specific sections and to clarify the specific documentation that may be required.
- The Load Entity and/or DSP complete their Verification RFI sections, upload their required Attestations and submit to the TSP for review [Ready for TSP/DSP Review] when they are done.
 - The TSP reviews all sections. If corrections are needed, the TSP may return the Verification RFI to the Load Entity [Returned to Load Entity]. This process can be repeated until all sections are complete.
- The TSP completes the final completeness check and submission to ERCOT [Submitted to ERCOT].

6.2 How to invite a contact:

The screenshot displays the 'Invite Contacts' interface within the RFI Dashboard. At the top, there's a navigation bar with 'RFI Dashboard' and 'Messages'. The main header shows 'JA-1921' and 'Request for Information - Project ABC (JA-1921) Status: Draft'. A green 'Invite Contacts' button is in the top right. The left sidebar lists various RFI sections like 'Instructions', 'Section SC - Site Control and Evidence', etc. The main content area shows the 'Status: Draft' and 'TSP Name: TEXAS TRANSMISSION SERVICE PROVIDER'. Below this, it lists 'DSP Name: TEXAS DISTRIBUTION SERVICE PROVIDER' and 'Responsible: TSP - TEXAS TRANSMISSION SERVICE PROVIDER (TSPtest3@fastmail.com)'. A green banner states 'Contacts saved successfully'. Below this, there's a table of invited contacts with columns for Email Address, First Name, Last Name, and Contact Type. The contacts listed are 'riooflct1@gmail.com', 'riooflct2@gmail.com', 'riooflct3@gmail.com', and 'riooflct4@gmail.com'. Each contact has a status indicator (green checkmark) and a note: 'Invited and signed in - fields are locked. Remove to revoke access.' At the bottom, there's a 'Back' button and 'Save' and 'Continue' buttons.

Figure 4 — Invite Contacts screen

To invite a contact:

- Open the Verification RFI from your dashboard. Click **Invite Contacts** at the top of the screen or **Contacts** in the left navigation menu.
- Click **+ Invite more people by email** to add a new contact.
- Enter the contact's Email Address, First Name, and Last Name.
- Select the Contact Type: ILLE (referred to as Load Entity) or DSP.
- Click **Save**. The contact(s) will receive an invitation email with a sign-in link.

Note: Registration and password reset links expire 5 days after they are issued. If your link expires before you accept the invitation, please contact to servicedesk@ercot.com to re-send the invitation notification.

Each Verification RFI is divided into sections. The sections and questions you see depend on your role and the Large Load Project's conditional classification in Batch Zero. Navigate between sections using the left navigation menu.

JUL-1921

Instructions:

Section SC – Site Control and Evidence

Section PS – Financial Security

Section PPS – LLLR Finance Security for System Supplies

Section LLE – Long-Lead Equipment

Section BE – Bid/Vote Customer Confirmation

Section AT – Affiliates

Section ALT – LLLR Allocation

Section PSP – Purch of Financial Security - Interconnecting TSP

Section WPS – Financial Security Methodology - Interconnecting TSP

Section THPS – Notice to Proceed - Interconnecting TSP

Section TOSC – Interconnecting TSP OAG

Section TAT – Allocation - Interconnecting TSP

Section CSPF – Purch of Financial Security - Interconnecting DSP

Section CPSP – Financial Security Methodology - Interconnecting DSP

Section DTHP – Notice to Proceed - Interconnecting TSP

Section DOAC – Interconnecting DSP OAG

Section DAT – Allocation - Interconnecting DSP

Contacts

Name _____

Message Center _____

APPROVALS

APPROVED BY: _____

DATE: _____

SECTION SC – SITE CONTROL AND EVIDENCE

Project ABC (JUL-1921)

TSP Name: TEXAS TRANSMISSION SERVICE PROVIDER

DSP Name: TEXAS DISTRIBUTION SERVICE PROVIDER

Responsible: TSP - TEXAS TRANSMISSION SERVICE PROVIDER (TSPteam2@seamail.com)

RRI Round: Original

Section SC – Site Control and Evidence

In the site control and evidence section, the interconnecting Large Load Entity (LLE) must provide the following information and produce documents evidencing that it holds one of the qualifying property interests listed in Planning Guide Section 3.2.10(c)(4)(D), covering one or more parcels of land sufficient to accommodate the LLE's planned Load Facilities at the proposed Large Load location.

Reliance on Affiliates and Third Parties

If any lease, deed, or purchase and sale agreement responsive to this Site Control Section is held by an Affiliate of the LLE or by a non-Affiliated entity acting as the LLE's agent rather than by the LLE, respond to the questions in this Section as to that document, and identify the holder. The basis of affiliation or agency and the supporting proof are addressed in the Affidavit and Agent Reliance subsection at the end.

Lease, Lease Agreement with a term of at least five years from the date the LLE expects to reach the total non-coincident peak Demand stated in its Load Commissioning Plan (LCP)

SC-1: Does the LLE have a signed and executed lease agreement with a term of at least five years from the date the LLE is expected to reach the total non-coincident peak Demand stipulated in its LCP for any part of the property that makes up the location of the planned Load Facility?

☐ Yes ☐ No

Deed Deed conveying the parcel

SC-4: Does the LLE have a deed conveying to it any part of the property that makes up the site of the Load Facility?

☐ Yes ☐ No

Purchase and Sale Agreement

SC-7: Does the LLE have a signed and executed purchase and sale agreement to acquire any part of the property that makes up the site of the Load Facility?

☐ Yes ☐ No

Parcels Sufficient to Accommodate Planned Load Facilities

**SC-10: State the total acreage of the proposed Large Load site _____.
_____ Acres**

**SC-11: State the total acreage required to accommodate the planned Load Facilities as designed _____.
_____ Acres**

SC-12: Do the qualifying property interests produced and documented in response to SC-2, SC-3, and SC-8, taken together, cover the full acreage identified in SC-10?

☐ Yes ☐ No

**SC-14: State the total acreage covered by the qualifying property interests identified in SC-2, SC-3, and SC-8 _____.
_____ Acres**

SC-15: Is the acreage identified in SC-14 at least the acreage identified in SC-11?

☐ Yes ☐ No

SC-17: Produce the current site plan for the proposed Large Load site, dated and drawn to scale, showing (a) the boundaries of each parcel identified in the instruments produced in response to this RFI keyed to the parcel identifiers or legal descriptions in the responses to SC-2, SC-3, and SC-8; and (b) the footprint and location of all planned Load Facilities. Identify any planned facility or infrastructure that falls outside the acreage covered by the produced instruments. If more than one version of the site plan exists, produce the most recent and identify it by file name and date.

Supporting documents

No attachments

Question types you may see:

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Question type	How to answer
Supporting document upload	Click '+ Choose File' to attach a file. You can upload multiple files. All file types are accepted. Files appear in the Supporting Documents table once uploaded. File naming conventions are specified in the Instructions. Note: all uploaded files are scanned by ERCOT's Security systems and will not upload if they are harmful or corrupt. For very large files and depending on your upload bandwidth, this can take time. Once the file is scanned and fully uploaded, it can be viewed.

To complete a section:

- Click on the section name in the left navigation menu.
- Answer each question in your assigned section.
- For questions requiring supporting document(s), click '+ Choose File' to upload your file. It will appear in the Supporting Documents table showing File Name, Type, User, and the date it was attached.
- Click 'Save & Continue' at the bottom right to save your answers and move to the next section. Click 'Back' to return to the previous section.

Note: You can save your progress at any time and return later. Your answers are not submitted to the TSP until you explicitly click 'Submit to TSP for review' on the Review screen. If a question is marked (Required), you must answer it before submitting.

8. Review and Submit

8.1 Review and Submit (DSP and Load Entity):

Once you have completed all Sections and questions assigned to your role (Load Entity, DSP), or at any point during completion, you can navigate to the Review screen to ensure your Sections are complete.

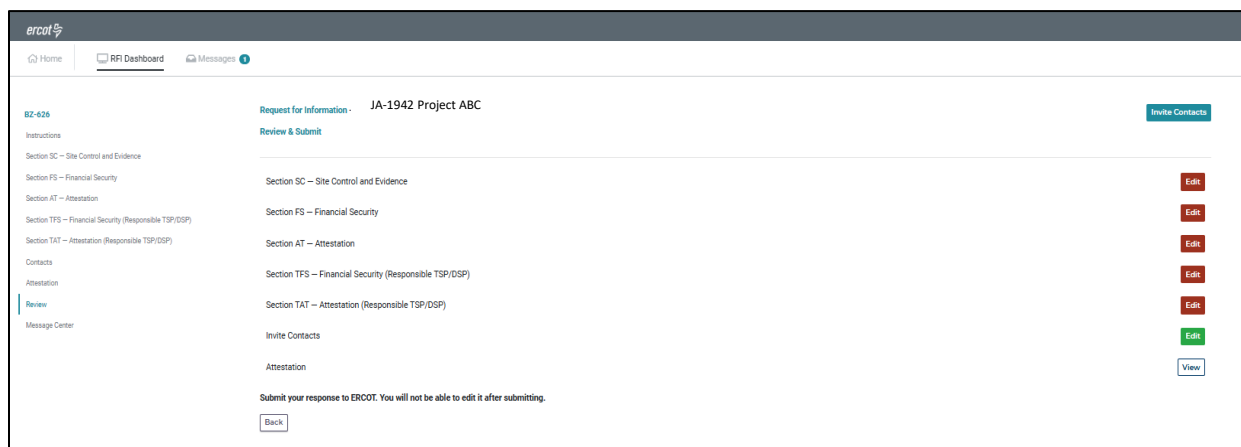


Figure 6 — Review & Submit screen (red = incomplete, green = complete, View = read-only)

Understanding the section status buttons:

Button	What it means
Red Edit	This section has missing or incomplete required fields. Click Edit to open it, complete the missing answers, and return to Review.

Button	What it means
Green Edit	This section is complete. If it is assigned to your role, you can still click Edit to review or change answers before submitting.
View	This item is view-only from the Review screen. Once the Verification RFI is submitted, you will be able to View the responses.

To submit the Verification RFI to the TSP (referred to as Responsible TSP):

- Review every section listed on the screen. Ensure all sections that are assigned to the role show a green Edit button.
- If any of your Sections show a red Edit button, click it to open that section, complete the missing information, and return to Review.
- Once all required sections are complete, the **Submit to Responsible TSP/DSP** button becomes active.
- Click **Submit** to send the completed Verification RFI to the Responsible TSP/DSP.

Note: If the Load Entity clicks Submit to ERCOT before the DSP has responded, the TSP must Return the Verification RFI to the Load Entity to unlock it so the DSP can complete its section.

Note: Only the TSP can submit the completed Verification RFI to ERCOT. Once submitted, the Verification RFI is locked and cannot be edited. If ERCOT finds an issue, they may contact the TSP to resolve it.

8.2 Complete, Review and Submit (TSP only):

Once you have completed all Sections and questions assigned to your role (TSP), or at any point during completion, you can navigate to the Review screen to ensure your Sections are complete.

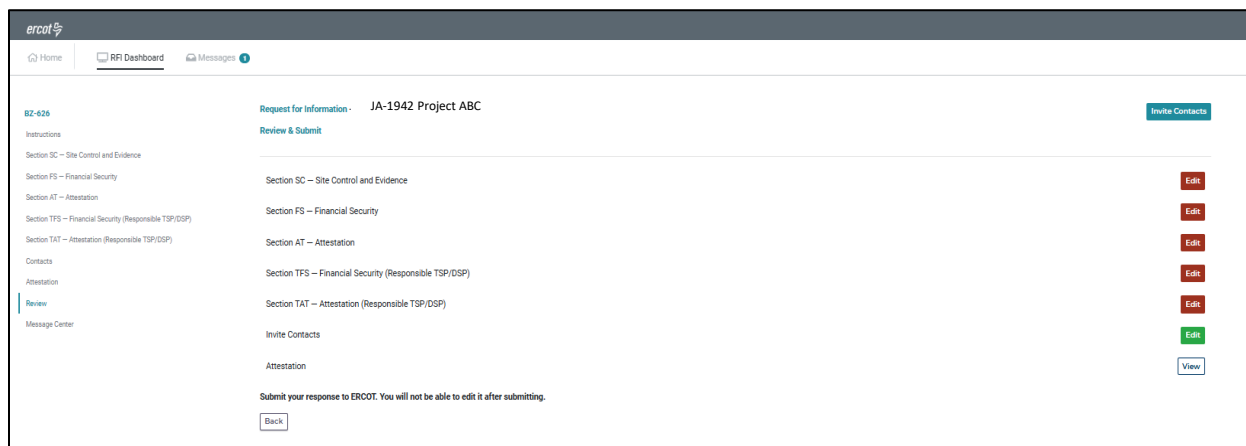


Figure 7 — Review & Submit screen (red = incomplete, green = complete, View = read-only)

Understanding the section status buttons:

Button	What it means
Red Edit	This section has missing or incomplete required fields. Click Edit to open it, complete the missing answers, and return to Review.
Green Edit	This section is complete. If it is assigned to your role, you can still click Edit to review or change answers before submitting.

Button	What it means
View	This item is view-only from the Review screen. Once the Verification RFI is submitted, you will be able to View the responses.

When all parties participating in the Verification RFI have completed their Sections and questions and submitted the Verification RFI to the Responsible DSP/TSP:

- Review every section listed on the screen. Ensure all sections show a green Edit button.
- If any of your Sections show a red Edit button, click it to open that section, complete the missing information, and return to Review.
 - ILLE and DSP Sections should be green as they are unable to submit to you when they are Red.
- Once all required sections are complete, the **Submit to ERCOT** button becomes active.
- Click **Submit** to send the completed Verification RFI to the ERCOT.

Note: It is the TSP's responsibility to submit the fully completed Verification RFI to ERCOT. Only the TSP has the Submit to ERCOT button available. Once submitted, the Verification RFI is locked and cannot be edited. If ERCOT finds an issue, they may contact the TSP to resolve it.

9. Message Center

The Message Center (accessed from the left navigation menu inside a Verification RFI) allows TSPs, DSPs, Load Entities, and ERCOT to communicate about a specific Verification RFI. You can create a new message topic, select its type, set an optional due date for the message response, and choose which parties receive the message.

Figure 8 — Message Center — New Topic form with Type dropdown

To create a new message topic:

- Open the Verification RFI. Click Message Center on the left navigation menu.
- Click '+ New topic' in the top right.
- Enter a Subject for your message.
- Select a Type from the dropdown:

Type	When to use it
Information	Share general information with the selected parties.
Action Required	Notify a party that they need to take a specific action.
Document Request	Request a document or file from a party.
Review Complete	Notify that a review has been completed.
Milestone Update	Share a project milestone or progress update.
Returned for Correction	Notify a party that their submission has been returned and needs correction.
Returned to Load Entity	Notify the Load Entity that the Verification RFI has been returned to them for correction.
Follow-up Verification RFI Issued	Notify parties that a follow-up Verification RFI has been issued.

- Optionally set a Due date using the date picker (future dates only).
- Write your message in the Message field.
- Use the Send to checkboxes to select who receives this message: All, ERCOT, TSP, DSP, or Load Entity.
- Click 'Open topic' to send.

Filtering and tracking messages:

Use the filter buttons below the form — All, Open, Awaiting Response, Resolved — to view threads by their current status. Click any thread to open it and reply.

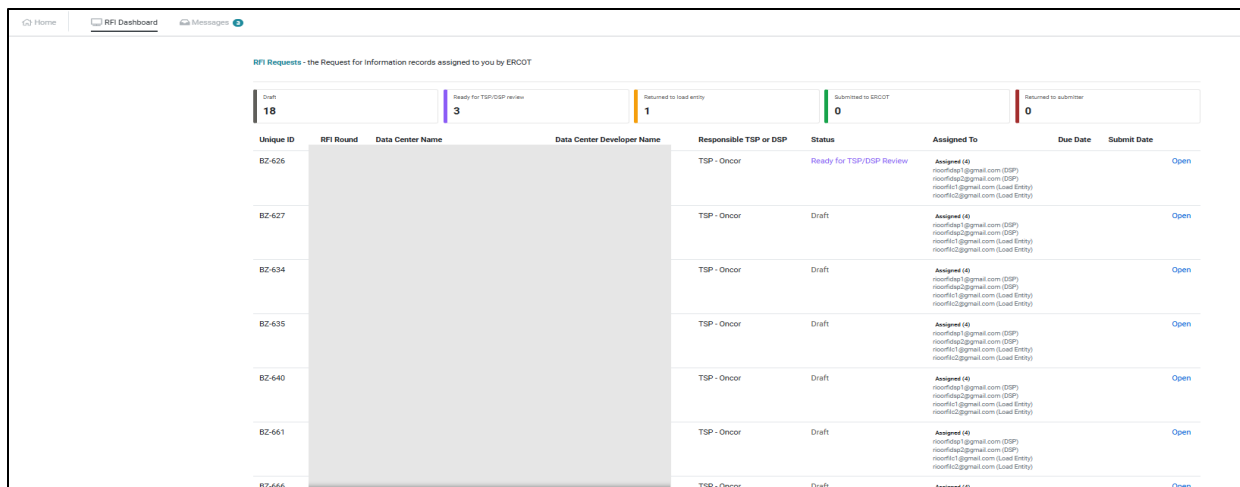
Note: Only the parties selected in 'Send to' can see a message thread. ERCOT can see all threads on every Verification RFI.

10. Load Entity — Screens and Procedures

Note: Load Entities and DSPs follow the same screens and procedures described in this section. The only differences are the questions assigned to each role and the attestation file type accepted.

10.1 RFI Dashboard (Load Entity view)

When a Load Entity logs in, the RFI Dashboard shows all Verification RFIs they have been invited to by a TSP. The layout and status tiles are the same as the TSP dashboard.

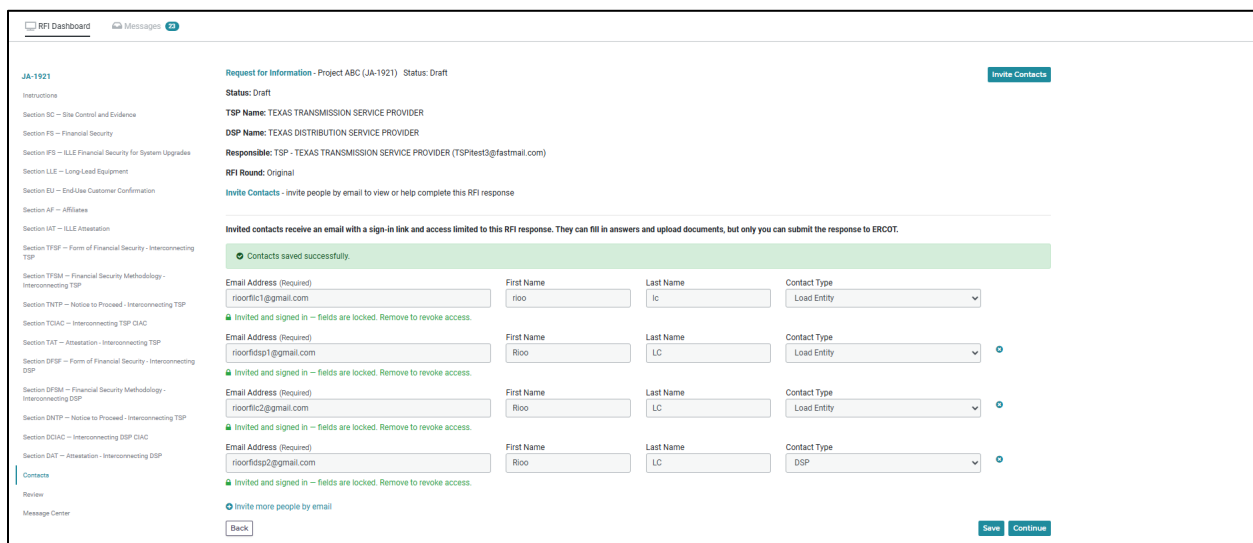


Unique ID	RFI Round	Data Center Name	Data Center Developer Name	Responsible TSP or DSP	Status	Assigned To	Due Date	Submit Date
BZ-626				TSP - Oncor	Ready for TSP/DSP Review	Assigned (4) noorfic1@gmail.com (DSP) noorfic2@gmail.com (DSP) noorfic1@gmail.com (Load Entity) noorfic2@gmail.com (Load Entity)		Open
BZ-627				TSP - Oncor	Draft	Assigned (4) noorfic1@gmail.com (DSP) noorfic2@gmail.com (DSP) noorfic1@gmail.com (Load Entity) noorfic2@gmail.com (Load Entity)		Open
BZ-634				TSP - Oncor	Draft	Assigned (4) noorfic1@gmail.com (DSP) noorfic2@gmail.com (DSP) noorfic1@gmail.com (Load Entity) noorfic2@gmail.com (Load Entity)		Open
BZ-635				TSP - Oncor	Draft	Assigned (4) noorfic1@gmail.com (DSP) noorfic2@gmail.com (DSP) noorfic1@gmail.com (Load Entity) noorfic2@gmail.com (Load Entity)		Open
BZ-640				TSP - Oncor	Draft	Assigned (4) noorfic1@gmail.com (DSP) noorfic2@gmail.com (DSP) noorfic1@gmail.com (Load Entity) noorfic2@gmail.com (Load Entity)		Open
BZ-661				TSP - Oncor	Draft	Assigned (4) noorfic1@gmail.com (DSP) noorfic2@gmail.com (DSP) noorfic1@gmail.com (Load Entity) noorfic2@gmail.com (Load Entity)		Open
BZ-666				TSP - Oncor	Draft	Assigned (4) noorfic1@gmail.com (DSP) noorfic2@gmail.com (DSP) noorfic1@gmail.com (Load Entity) noorfic2@gmail.com (Load Entity)		Open

Figure 9 — RFI Dashboard as seen by a Load Entity (same layout as DSP dashboard)

10.2 Invite Contacts (Load Entity)

Load Entities can also invite additional contacts to help complete their assigned sections of the Verification RFI. The Invite Contacts screen works the same way as for TSPs — enter Email, First Name, Last Name, select a Contact Type, then click Save.



Request for Information - Project ABC (JA-1921) Status: Draft

Status: Draft

TSP Name: TEXAS TRANSMISSION SERVICE PROVIDER

DSP Name: TEXAS DISTRIBUTION SERVICE PROVIDER

Responsible: TSP - TEXAS TRANSMISSION SERVICE PROVIDER (TSPtest3@fastmail.com)

RFI Round: Original

Invite Contacts - invite people by email to view or help complete this RFI response

Invited contacts receive an email with a sign-in link and access limited to this RFI response. They can fill in answers and upload documents, but only you can submit the response to ERCOT.

Contacts saved successfully.

Email Address (Required)	First Name	Last Name	Contact Type
noorfic1@gmail.com	rio	lc	Load Entity
noorfic2@gmail.com	rio	lc	Load Entity
noorfic3@gmail.com	rio	lc	Load Entity
noorfic4@gmail.com	rio	lc	DSP

Invite more people by email

Back Save Continue

Figure 10 — Invite Contacts screen (Load Entity view)

10.3 Review and Submit (Load Entity)

The Review screen for the DSP or Load Entity shows all sections with their completion status. The DSP and Load Entity submit their responses to the TSP for review — not directly to ERCOT.

Figure 11 — Review & Submit screen (Load Entity view — Submit Verification RFI for TSP/DSP review)

Once all required sections are complete and the attestation has been uploaded, click ‘Submit RFI for TSP/DSP review’. The form will be locked while under review and will unlock if the TSP/DSP returns it to you.

Note: The Load Entity’s Submit button says ‘Submit RFI for TSP/DSP review’. This sends your response to the TSP, not to ERCOT. Only the TSP can submit the final completed Verification RFI to ERCOT.

Note: If the Load Entity Submits to ERCOT before the DSP has responded, the TSP must Return the Verification RFI to the Load Entity to unlock it so the DSP can complete their section.

10.4 Message Center (Load Entity)

The Message Center works the same way for Load Entities as for TSPs. Load Entities can send messages to All, ERCOT, TSP, DSP, or Load Entity using the Send to checkboxes.

Figure 12 — Message Center (Load Entity view)

11. DSP — Screens and Procedures

Note: DSPs follow the same screens and procedures as Load Entities for answering questions, attestation, and the Message Center. The key differences are highlighted below.

11.1 RFI Dashboard (DSP view)

When a DSP logs in, the RFI Dashboard shows all Verification RFIs they have been invited to by a TSP. The dashboard shows status tiles and the same Verification RFI list as other roles.

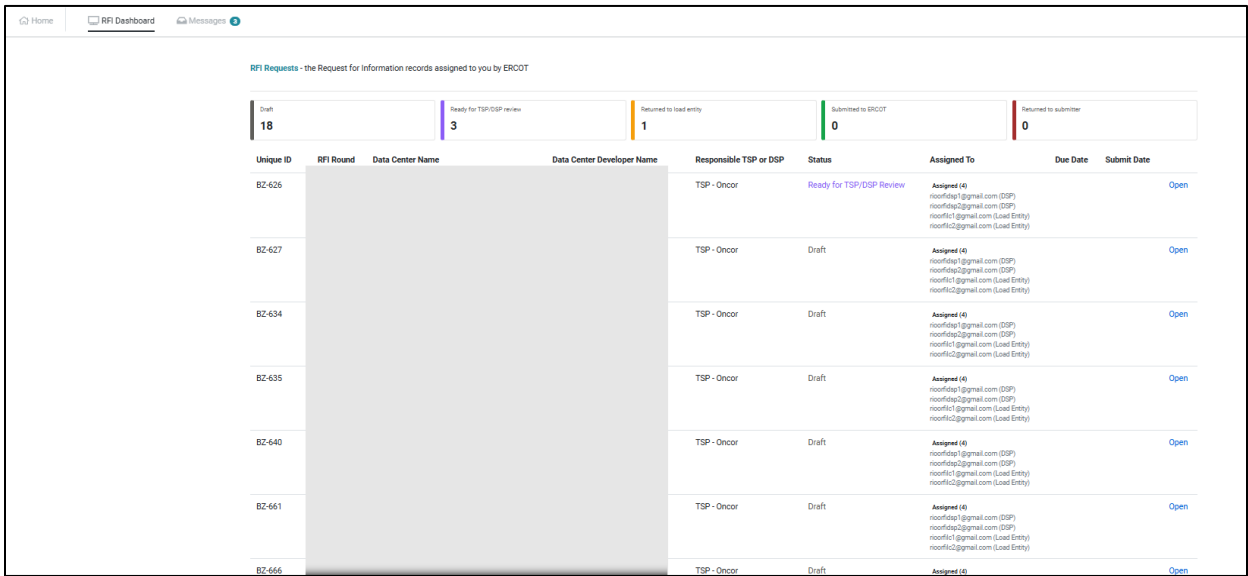


Figure 13 — RFI Dashboard as seen by a DSP

11.2 Invite Contacts (DSPs)

DSPs can also invite additional contacts to help complete its assigned sections of the Verification RFI. The Invite Contacts screen works the same way as for TSPs — enter Email, First Name, Last Name, select a Contact Type, then click Save.

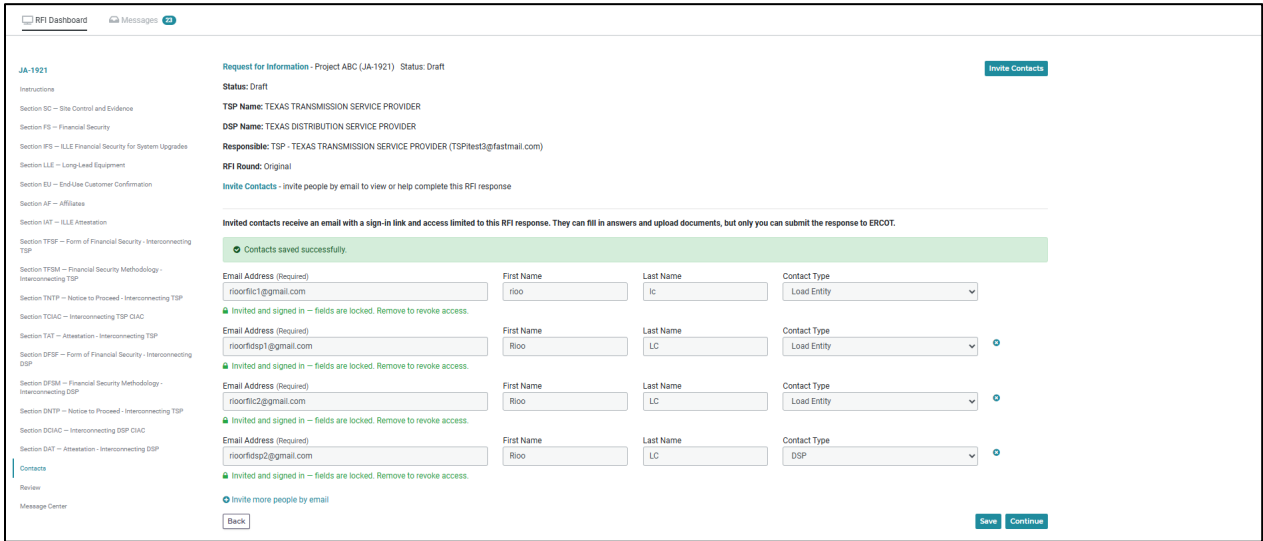


Figure 14 — Invite Contacts screen (DSP view)

11.3 Review and Submit (DSP view)

The DSP Review screen shows all sections and their completion status. Key differences from the TSP and Load Entity views:

- The Verification RFI shows a lock message when it has already been submitted for TSP review: ‘This response has been submitted for TSP/DSP review and is locked. It will be editable again if the TSP returns it to you.’
- The DSP does not have a Submit to ERCOT button. The DSP’s role is to complete their assigned sections, including their Attestation and submit to the TSP — the TSP is responsible for the final submission to ERCOT.

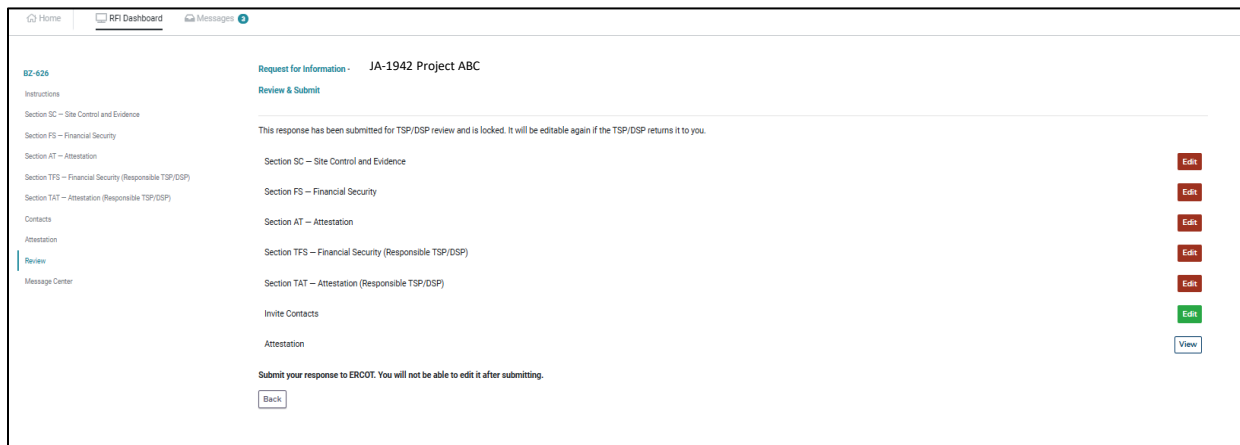


Figure 15 — Review screen (DSP view — locked after Load Entity submits to TSP, no Submit to ERCOT button)

Note: If the DSP needs to make changes after the Verification RFI has been locked, the TSP must return it. The DSP cannot unlock the Verification RFI themselves. DSPs follow the same question-answering, attestation, and Message Center procedures as Load Entities described in Section 10.

12. Where to Get Help

- If you have any questions about the substance of the Verification RFI, please submit them to LargeLoadVerification@ercot.com
- If you have any technical questions about or issues using the RIOO platform, please submit them to servicedesk@ercot.com.

Note: Registration and password reset links expire 5 days after they are issued. If your link expires before you accept the invitation, please contact to servicedesk@ercot.com to re-send the invitation notification.