

ERCOT Eligibility Verification RFI — Load Type C and D — Question Reference Guide

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RFI version 1.0

What this reference guide provides: The following tables list every question in ERCOT’s request for information (RFI) for Large Loads conditionally classified as base load under Planning Guide Section 9.2.1.1(1)(c) and (d). The RFI requests supporting materials for ERCOT to perform site-readiness verification, which ERCOT is authorized to do under Planning Guide Section 9.1(8). This document is a reference guide only; the RFIs in the response portal built in Resource Integration and Ongoing Operations (RIOO) are the controlling documents. Changes from the preceding version(s) of the Verification RFI are indicated by footnotes. These changes are technical or typographical only and do not affect any answer already submitted. Answers submitted in RIOO are retained across versions, so no action is required.

How to read the table: Each row identifies a question included in ERCOT’s Verification RFI for Load Types C and D and the columns provide additional information for each question. By navigating the table, you can determine which questions an Interconnecting Large Load Entity (ILLE) must answer. Yellow rows provide instructions that govern the questions beneath them.

- The column titled “Question ID” provides a unique identifier for each question. Question IDs ending in a letter (e.g., SCD-2a) identify sub-questions within a repeating set; these IDs are used here for reference only and do not appear in the RFI response portal.
- The columns titled “Question” and “Answer format” provide the text of each question and identify whether the question requires a “yes” or “no” answer, a narrative response, multiple-choice, and/or supporting documentation.
- The column titled “When to answer this question” identifies whether the question is universal, or if it is triggered only by the respondent’s answer to a prior question (e.g., “If SCD-1 is Yes”).
- The column titled “Answer opens follow-up questions” identifies whether the respondent’s answer to that question triggers additional questions (e.g., “If Yes → SCD-2”). The presence of a dash in that column means no additional questions are triggered, and the respondent simply continues to the next universal question identified as “Always” in the “When to answer this question” column.

General Instructions:

- STOP. This Request for Information (RFI) applies to a Large Load seeking inclusion in Batch Zero as base load not subject to additional study under Planning Guide Section 9.2.1.1(1)(c) and (d). Before continuing, the Interconnecting Transmission Service Provider (Interconnecting TSP) must confirm that it is using the correct template for the applicable eligibility path and that it has added the Interconnecting Large Load Entity (ILLE, also referred to as Load Entity in this RFI) contact. The system will create an account for each contact added, allowing that entity to complete its portion of the RFI.
- The Interconnecting Transmission Service Provider (Interconnecting TSP) must submit the response to the RFI to ERCOT within 10 Business Days of ERCOT's issuance of the RFI.
- The ILLE must coordinate with the Interconnecting TSP so that the Interconnecting TSP receives all ILLE-provided information and documentation with sufficient time to submit a complete response within 10 Business Days of ERCOT's issuance of the RFI.
- Customer-specific information submitted to ERCOT by the Interconnecting TSP pursuant to this RFI is considered Protected Information under ERCOT Protocols § 1.3.1.1(1)(r) (Items Considered Protected Information). To ensure the ILLE's information receives this treatment, the ILLE must provide all information and supporting documentation through RIOO as part of the response the Interconnecting TSP submits. 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 RIOO platform, please submit them to servicedesk@ercot.com.
- Please review Planning Guide Revision Request (PGRR) 145 and Planning Guide Section 9 for assistance in answering the RFI. PGRR 145 is accessible at <https://www.ercot.com/mktrules/issues/PGRR145#keydocs>.
- Capitalized terms used in the RFI are defined either within the RFI, Planning Guide Section 9, or Protocol Section 2.

How the RFI is Completed and Submitted

This RFI is completed by the Interconnecting TSP and the ILLE in the following sequence:

- (1) The Interconnecting TSP logs in to RIOO and adds the ILLE contact. The RIOO system creates an account for each contact added.
- (2) The ILLE completes the RFI and uploads its supporting documents and exhibit lists.
- (3) Once all portions are complete, the Interconnecting TSP submits the completed response to ERCOT within 10 Business Days of ERCOT's issuance of the RFI.

For step-by-step instructions on completing and submitting the RFI in RIOO, refer to the user guide on the ERCOT website.

Document Submission Instructions:

Any documentation that is requested by ERCOT or referenced in or relied upon by the ILLE 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]_ILLE_[ExhibitIdentifier]_VerificationRFI_[YYYYMMDD]

- Ex: BZ9999_ILLE_ExhibitA_VerificationRFI_20260817
- *The “BZNumber” is the unique identifier assigned to the Large Load interconnection request.*
- *“Submitter” should be “ILLE.”*
- *“Exhibit Identifier” is the chronological identification of the exhibits.*

If the same document is responsive to more than one question, the ILLE *must upload it in response to each such question*. The exhibit file name must remain the same each time the document is uploaded. Do not rename the document or assign it a new Exhibit Identifier. The document is listed only once on the exhibit list, and each response citing it uses the same Exhibit Identifier and file name.

Prior to submission of the RFI response, the ILLE shall upload an exhibit list identifying each document it produced, 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:

Example:

Exhibit Identifier	Submitter	Title of Supporting Document	File Name of Supporting Document
A	ILLE	Executed property deed	BZ9999_ILLE_ExhibitA_VerificationRFI_20260817
B	ILLE	Financial Security	BZ9999_ILLE_ExhibitB_VerificationRFI_20260817

- For each document provided pursuant to, referenced in, or relied upon for an RFI response, the ILLE 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 BZ9999_ILLE_Exhibit A_VerificationRFI_20260817 at pages 10-14

The RFI requires the ILLE to submit a sworn and notarized ILLE RFI Attestation in the format posted on the ERCOT Large Load Integration page, which must be executed by an official, officer, or other authorized person with authority to bind the ILLE stating that the responses, information, and documents provided are true and correct.

ILLE's Reliance on an Eligibility Affiliate or Non-Affiliated Third Party

An eligibility criterion may be satisfied by an Eligibility Affiliate of the ILLE or by a non-affiliated third party that the ILLE has designated to act as its agent, under a contractual arrangement, to satisfy the criterion on the ILLE's behalf. “Eligibility Affiliate” means an entity that qualifies under one of the bases set out

below and is defined solely for determining eligibility and reliance in the Batch Zero Process and differs from, and does not incorporate, the definition of "Affiliate" in the ERCOT Protocols. The bases on which an entity qualifies as an Eligibility Affiliate are set out below. A non-affiliated third party is not an Eligibility Affiliate. In each applicable Section, the ILLE may identify a non-affiliated third party by selecting option (6) in that Section. Where the ILLE relies on an Eligibility Affiliate or a non-affiliated third party to satisfy any criterion addressed in this RFI, the ILLE must, in the applicable Section: (1) identify the Eligibility Affiliate or non-affiliated third party and the criterion it satisfied; (2) respond to the questions in that Section as to the Eligibility Affiliate's or non-affiliated third party's actions or documents to the same extent as if they were the ILLE's; and (3) provide the basis of affiliation (for an Eligibility Affiliate).

Basis for Eligibility Affiliation:

For purposes of this RFI, an entity qualifies as an Eligibility Affiliate of the ILLE on one of the following bases (these correspond to the bases for Eligibility Affiliate status in the Batch Zero Affiliate Form, in which "Designated ILLE" has the same meaning as "ILLE" in this RFI). The terms "person" and "entity" have the meanings set forth in Texas Business Organizations Code Section 1.02.

- (1) A person who directly or indirectly owns or holds at least 5.0% of the voting securities or membership interests of the ILLE;
- (2) A person in a chain of successive ownership of at least 5.0% of the voting securities or membership interests of the ILLE;
- (3) An entity that has at least 5.0% of its voting securities or membership interests owned or controlled, directly or indirectly, by the ILLE;
- (4) An entity that has at least 5.0% of its voting securities or membership interests owned or controlled, directly or indirectly, by: (i) a person who directly or indirectly owns or controls at least 5.0% of the voting securities of the ILLE; or (ii) a person in a chain of successive ownership of at least 5.0% of the voting securities of the ILLE; or
- (5) A person who is an officer or director of the ILLE or of an entity in a chain of successive ownership of at least 5.0% of the voting securities or membership interests of the ILLE.

SITE CONTROL AND DEVELOPMENT				
Question ID	Answer format	Question	When to answer this question	Answer triggers follow-up questions
SCD-1	Multiple choice	Select the type of property interest the ILLE, its Eligibility Affiliate, or non-eligibility affiliated third party holds in the parcel(s) on which the planned Load Facilities will be located. Deed Executed Lease Executed Purchase and Sale Agreement Other	Always Attachment Optional	If Other → SCD-2
SCD-2	Text	If the ILLE answered Other, explain the property interest.	If SCD-1 Other	—
SCD-3	Number	Regarding the parcel(s) on which the planned Load Facilities will be located, state the number of acres under the ILLE's control.	Always	—
SCD-4	Number	State the total acreage required to accommodate the planned Load Facilities as designed.	Always	—
SCD-5	Text	For the parcel(s) identified in your response to SCD-1, describe all development activities completed as of the date of your response and all development activities currently underway. Development activity includes site preparation, grading, foundations, structures, utilities, equipment installation, and construction of the substation or interconnection Facilities.	Always Attachment Optional	—
SCD-6	Text/Attachment	Produce aerial imagery of the planned Load Facilities site and describe what it shows about the Large Load project's progress to date, including anything planned that is not yet visible.	Always Attachment Required	—
SCD-7	Text	Describe all development activities planned between the end of October 2026 and the requested energization date. For each planned activity, state the expected start date and expected completion date. Do not include any activity completed or currently underway that you reported in response to SCD-5. If you have no planned activity to report, so state.	Always Attachment Optional	

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SCD-8	Yes/No	Is the property interest in the parcels on which the planned Load Facilities will be located held by an Eligibility Affiliate of the ILLE or a non-eligibility affiliated third party?	Always Attachment Optional	If Yes → IBO-3 and IBO-4
SCD-9	Text/Attachment	Produce the current site plan for the proposed Large Load Facilities site, dated and drawn to scale.	Always Attachment Required	—

ILLE FINANCIAL COMMITMENT

Question ID	Answer format	Question	When to answer this question	Answer triggers follow-up questions
IFS-1	Yes/No	Has the ILLE paid any direct interconnection costs through Contributions in Aid of Construction (CIAC)?	Always	If Yes → IFS-2
IFS-2	Number	If the ILLE answered Yes in response to IFS-1, state the amount of CIAC paid in US dollars.	If IFS-1 is Yes Attachment Optional	—
IFS-3	Yes/No	Did the ILLE post financial security for system upgrades?	Always	If Yes → IFS-4
IFS-4	Number	If the ILLE answered Yes in response to IFS-3, state the amount of financial security posted in US dollars.	If IFS-3 is Yes Attachment Optional	—

ILLE BUSINESS ORGANIZATION

Question ID	Answer format	Question	When to answer this question	Answer triggers follow-up questions
IBO-1	Yes/No	Is the ILLE headquartered in China, Iran, North Korea, or Russia?	Always	—

FOR REFERENCE ONLY - RFI Responses Must be Submitted Through RIOO

IBO-2	Yes/No	Is the ILLE owned by or the majority of stock or other ownership interest of the ILLE held or controlled by: (i) individuals who are citizens of China, Iran, North Korea, or Russia; or (ii) a company or other entity, including a governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of China, Iran, North Korea, or Russia?	Always	—
IBO-3	Yes/ No/ N/A	If the ILLE answered Yes in response to SCD-8, is the Eligibility Affiliate headquartered in China, Iran, North Korea, or Russia?	Always	—
IBO-4	Yes/ No/ N/A	If the ILLE answered Yes in response to SCD-8, is the Eligibility Affiliate owned by or the majority of stock or other ownership interest of the Eligibility Affiliate held or controlled by: (i) individuals who are citizens of China, Iran, North Korea, or Russia; or (ii) a company or other entity, including a governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of China, Iran, North Korea, or Russia?	Always	—

ILLE ATTESTATION AND EXHIBIT LIST

Question ID	Answer format	Question	When to answer this question	Answer triggers follow-up questions
IAT-1	Attachment (required attestation available on ERCOT's Large Load Integration page)	By completing and submitting the ILLE RFI Attestation (available on ERCOT's Large Load Integration page), the ILLE confirms that the information submitted by the Interconnecting TSP in response to this RFI is true, accurate, and complete to the best of your knowledge, and that, after all reasonable inquiry, all material information reasonably responsive to the request has been provided.	Always	—

FOR REFERENCE ONLY - RFI Responses Must be Submitted Through RIOO

IAT-2	Attachment (template available on ERCOT’s Large Load Integration page)	Prior to submission of the RFI response, the ILLE shall upload an exhibit list identifying each document that it provided, referenced, or relied upon in its response to the RFI. An exhibit list template is available on ERCOT’s Large Load Integration page.	Always	—
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