



# *Western Renewable Energy Generation Information System*

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## ***WREGIS SYSTEM*** **NERC e-Tags** **USER TRAINING**

October 2011



# *WREGIS Participant Training*

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## ***NERC e-Tags Overview***



## *NERC e-Tags: Overview*

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- The WREGIS NERC e-Tag functionality is used to track proof of energy delivery as required by one or more regulatory bodies within the Western Interconnection.
  - **If you are not sure whether you are required to track energy delivery using this functionality, please contact your state RPS Administrator.**
- A query run on the WECC Interchange Tool is used to pull NERC e-Tag information. The functionality allows the proof of delivery data to be uploaded into the WREGIS account of the “entity importing the energy into the jurisdiction,” which could be, but is not always, the Load-Serving Entity on the e-Tag.



## *NERC e-Tags: Adding Functionality*

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- Contact WREGIS Administrator with PSE codes to be pulled
  - Only the WREGIS Staff can add a PSE code to your profile
  - If you do not see a PSE code on your account profile, WREGIS WILL NOT be pulling your NERC e-Tags (tags can only be pulled going forward)
- The Account Holder will be assessed a monthly NERC e-Tag Deliverability fee. A one-time, set up fee may be applicable.



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## ***NERC e-Tags Criteria***



## *NERC e-Tags: Criteria*

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- Contact your scheduler to ensure that all information is entered correctly.
- NERC e-Tags that do not comply with the criteria will not be imported into WREGIS and will not be available for use in WREGIS-related functions.



## *NERC e-Tags: Criteria*

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- For schedules matching a WECC-approved Purchasing-Selling Entity (PSE) list, the importing PSE will be identified using NERC PSE Codes and the following logic:
  - Schedules with a start/stop date and time within the previous calendar month in the Pacific Daylight Time zone (Sept 2011 and earlier were in Universal Coordinated Time zone).
  - Schedules with RPS ID numbers. These values are found on the e-Tag Physical Path in the Misc Info Tokens of “RPS\_ID.” These can be found on any line of the e-Tag Physical Path but only on one (1) line per e-Tag.



## *NERC e-Tags: Criteria*

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- Once the “RPS\_ID” line is identified then the PSE on that line of the physical path is deemed to be the importing Entity.
- Note: one (1) line of the physical path may contain up to ten (10) “RPS\_ID” values and all ten (10) of these values will continue to be sent to the WREGIS system as a single token. **If the “RPS\_ID” Miscellaneous token is found on more than one (1) line of the physical path, then the tag is excluded.**



# NERC e-Tags: Required Format

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- Required format to be used the Physical Path

Misc(Token/Value)

<b>RPS_ID</b>	<b>actual RPS ID number and letter suffix</b>
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## *NERC e-Tags: Importing e-Tags*

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WREGIS cannot import your NERC e-Tags if:

- You are not a registered WREGIS account holder.
- You do not see a PSE code on your WREGIS account profile (tags can only be pulled going forward).
- Your NERC e-Tags are not properly filled out by your schedulers.
- More than one (1) entity enters an RPS ID on the same tag using different lines on the Physical Path.



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## ***NERC e-Tags for Compliance***



# ***NERC e-Tags for Compliance***

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## ***Section Objectives:***

## ***Learn how to...***

- Access the NERC e-Tags Summary Report
- Match certificates to NERC e-Tags
- Retire certificates with NERC e-Tags



# NERC e-Tags Summary Report

## Account Holder Reports

- [My Event Log](#)
- [My Sub-Accounts Certificates Disposition](#)
- [My Recurring Transfers](#)
- [Certificate Transfer History](#)
- [My Account Registration History](#)
- [My Generating Unit Registration History](#)
- [Generating Units By Status](#)
- [State/Provincial/Voluntary Program Admin Access Selection](#)
- [My Generation Activity Log](#)
- [My Report Export Request](#)
- [My Partial MWh](#)
- [My Generation Activity Report](#)
- [State/Provincial/Voluntary Compliance Report](#)
- [Account Holder Fees Report](#)
- [Certificate Import Request](#)
- [Generator Annual Production](#)
- [Certificate Annual Issuance](#)
- [NERC E-Tag Summary Report](#)
- [My Generating Units](#)
- [Meter Uploaded by Facility](#)

- In the Account Holder Reports Module access the report to show a list of all NERC e-Tags imported for use in compliance retirements.
- To determine the imported NERC e-Tags to match or retire download your NERC e-Tags Summary Report.

Available NERC E-tags					Matched NERC E-tags							
Load Control Area: <input type="text" value="Select All"/>												
Available NERC E-tags												
NERC Tag ID	Start Date	Stop Date	Generator Name	Load	Load Control Area	Generator Control Area	Load Serving Entity (PSE Sink)	Total MWh on Tag	Used MWhs	MWhs remaining	Importing Entity	Miscellaneous Field
<a href="#">BPAT_DPSEGENPSE8_CISO</a>	2008-01-15T13:00:00Z	2008-01-20T13:00:00Z	BPAPOWER	SDG3_SP15	CISO	BPAT	SCE01	800	0	800	SCE01	RPS_ID/123456/WindGenOregon
<a href="#">PACW_DPSEGENPSE10_CISO</a>	2009-01-15T13:00:00Z	2009-01-20T13:00:00Z	PACW-CA-Default	SDG3_SP15	CISO	PACW	SCE01	500	0	500	SCE01	RPS_ID/101201/LandfillCrazy



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## ***Matching Certificates to NERC e-Tags***



## *Matching Certificates to NERC e-Tags*

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- Only Account Holders who have had NERC e-Tags imported into their account can match certificates to NERC e-Tags.
- NERC e-Tags can only be transferred to another Account Holder after it has been matched to a certificate.
- Once a certificate has been matched to a NERC e-Tag it **CANNOT** be unmatched by the Account Holder or the WREGIS Administrator.
- 'Select Tags' pop-up window displays top 100 by NERC E-tag



# Matching Certificates to NERC e-Tags

Account Activity

Certificates	
Active	1,176
Retirement	215

1 From the **Account Activity** module, select **Active** certificates as the source of the REC/NERC Tag Match. Click the **certificate quantity** hyperlink

2 On the '**Certificates in Subaccount**' screen, select the desired **Generating Unit(s)** and **Generation Month(s)**, if needed change the certificate **quantity(ies)** (fixed amount only). Select '**REC/NERC Tag Match**'

Active Subaccounts: All Subaccount

Total Quantity:

Certificates in Subaccount																									
Select	Transfer Quantity	SubAccount	WREGIS GU ID	Generator Plant-Unit Name	Fuel Type	Vintage Year/Month	Certificate Serial Numbers	Quantity	AZ	EC	CA	CO	MT	NV	NI	TX	WA	OR	AB	UT	Green-e Energy Eligible	Ecologo Certified	Hydro Certification	SMUD Eligible	NERC E-Tag Matched
<input type="checkbox"/>	2	10	W10	KG Ocean 1 - KG Ocean 1	Ocean	2007/07	10-CA-51-38 to 37	2	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No
<input checked="" type="checkbox"/>	1	10	W10	KG Ocean 1 - KG Ocean 1	Ocean	2007/07	10-CA-51-38 to 76	1	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No



# Matching Certificates to NERC e-Tags

3

Enter the details of the REC/NERC Tag Match on the Transfer Certificates screen:

- Select the **REC/NERC Tag** radio button
- Select **'Match Tags'**

Transfer Certificates																							
Certificate Serial Numbers	Quantity	Transfer Quantity	Generator Plant-Unit Name	Fuel Type	Vintage	Arizona	British Columbia	California	Colorado	Montana	Nevada	New Mexico	Texas	Washington	Oregon	Alberta	Utah	Green-e Energy Eligible	Ecologo Certified	Hydro Certification	SMUD Eligible	NERC E-Tag Matched	
10-CA-51-38 to 70	33	1	KG Ocean 1 - KG Ocean 1	Ocean	2007/07	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	

Transfer  certificates to:

REC/NERC Tag    REC/NERC Match

REC/NERC Match     Match Tags

Warning: leaving this page while certificate/NERC E-Tag matching process is in process may result in matching not completing correctly.



# Matching Certificates to NERC e-Tags

4

Enter the details of the Search in the 'Select Tags' pop-up window:  
(Displays top 100 by NERC E-tag- select as many or few as needed)

- NERC e-Tag
- Capacity
- Sink Area
- Start/Stop Date
- Generator Name
- Point of Delivery
- Balancing Authority
- Load Serving Entity
- Misc. Field (RPS\_ID)

Select 'Search'

Total Selected Capacity: 800  
1 NERC E-Tags found.

Selected	NERC E-Tag	Capacity	Sink Area	Start Date	Stop Date	Generator Name	Point Of Delivery	Balancing Authority	Load Serving Entity	Miscellaneous Field
<input checked="" type="checkbox"/>	PAT_DPSEGENPSES_CISO	800	SDG3_SP15	2008-01-15T13:00:00Z	2008-01-20T13:00:00Z	BPPOWER	SDG3_SP15	CISO	SCE01	RPS_ID123456/WinGenOregon

Save Cancel

5

In the same 'Select Tags' pop-up window  
(Displays top 100 by NERC E-tag)  
-Select the **NERC e-Tag(s)**  
-Select **Save**



# Matching Certificates to NERC e-Tags

6

On the 'Transfer Certificates' screen, verify the correct batch(es) and amount(s) have been selected (**Transfer Quantity**, **Generating Unit(s)** and **Generation Month(s)**), if needed make changes. Select '**Submit**'

Transfer Certificates																						
Certificate Serial Numbers	Quantity	Transfer Quantity	Generator Plant-Unit Name	Fuel Type	Vintage	Arizona	British Columbia	California	Colorado	Montana	Nevada	New Mexico	Texas	Washington	Oregon	Alberta	Utah	Green-e Energy Eligible	Ecologo Certified	Hydro Certification	SMUD Eligible	NERC E-Tag Matched
10-CA-51-38 to 70	33	1	KG Ocean 1 - KG Ocean 1	Ocean	2007/07	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No

Transfer  certificates to:

REC/NERC Tag    REC/NERC Match

*Warning: leaving this page while certificate/NERC E-Tag matching process is in process may result in matching not completing correctly.*



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## ***Retiring certificates with NERC e-Tags***



## *Retiring Certificates with NERC e-Tags*

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- Retirements are FINAL.
  - Check with your State/Provincial/Voluntary Program Administrator for specific RPS requirements.
- 2 options for retiring certificates with NERC e-Tags:
  - 1) previously matched certificates and
  - 2) Match RECs to NERC e-Tags imported in the Account Holders account.
- Account Holders who have NERC e-Tags imported into their account can retire certificates to NERC e-Tags with either option.



## *Retiring Certificates with NERC e-Tags*

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- 'Select Tags' pop-up window displays top 100 by NERC E-tag
- To determine the imported NERC e-Tags to retire download your NERC e-Tags Summary Report.
- Choose and retire certificates with like retirement types and details.



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## ***Retiring with Matched Certificates***



# Certificate Retirement: Matched NERC e-Tags

Account Activity

Certificates	
Active	1,176
Retirement	215

1

From the **Account Activity** module, select **Active** certificates as the source of the Retirement. Click the **certificate quantity** field

2

On the '**Certificates in Subaccount**' screen, find certificates with NERC e-Tags matched by using the "**Search or filter this report**" icon

All Active Retirement Reserve Exported Bulletin Board

Active Subaccounts: All Subaccount

Total Quantity: 1 **Batch Transfer** REC/NERC Match

Certificates in Subaccount

Select	Transfer Quantity	SubAccount	WREGIS GU ID	Generator Plant/Unit Name	Fuel Type	Vintage Year/Month	Certificate Serial Numbers	Quantity	AZ	BC	CA	CO	MT	NV	NI	TX	WA	OR	AB	UT	Green Energy Eligible	Ecology Certified	Hydro Certification	SMUC Eligible	NERC E-Tag Matched
<input type="checkbox"/>	2	10	WH0	KG Ocean 1 - KG Ocean 1	Ocean	2007/07	10-OA:51-36 to 37	2	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No
<input checked="" type="checkbox"/>	1	10	WH0	KG Ocean 1 - KG Ocean 1	Ocean	2007/07	10-OA:51-38 to 38	1	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	Yes
<input type="checkbox"/>	22	10	WH0	KG Ocean 1 - KG Ocean 1	Ocean	2007/07	10-OA:51-39 to	22	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No

3

On the same '**Certificates in Subaccount**' screen, select the desired **Generating Unit(s)** and **Generation Month(s)**, if needed change the certificate **quantity(ies)** (fixed amount only).

Select '**Batch Transfer**'



# Certificate Retirement: Matched NERC e-Tags

4

Enter the details of the retirement on the Certificate Transfer screen:

- Select the **Retirement** radio button
- Specify **Retirement Sub-Account**
- Select the **Retirement Type** "Used by the Account Holder for a State-Regulated Utility Renewable Portfolio Standard/Provincial Utility Portfolio Standard"
- Select the **Retirement Details**
  - State/Province**
  - RPS Compliance Period**
  - Reason: Out-of-State/Province Power Purchase**

-Select **'Submit'**  
(User will be asked to confirm action)

The screenshot shows the 'Transfer Certificates' interface. The 'Retirement' section is highlighted with a red rounded rectangle. The 'Retirement Type' is set to 'Used by the Account Holder for a State-Regulated Utility Renewable Portfolio Standard/Provincial Utility Portfolio Standard'. The 'State/Province' is 'CALIFORNIA', 'RPS Compliance Period' is '2011', and 'Reason' is 'Out-of-State/Province Power Purchase'. A 'Get Tags' button is visible with a warning message: 'Selected certificates have already been matched with NERC E-Tags. Please revise certificate selection.' At the bottom, 'Submit' and 'Cancel' buttons are circled in red.

*Retirements are FINAL. Check with your State/Provincial/Voluntary Program Administrator for specific RPS requirements.*

Warning: Leaving this page while a certificate transfer is in progress may result in the transfer not completing correctly.



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## ***Retiring with Imported NERC e-Tags***





# Certificate Retirement: Imported NERC e-Tags

4

Enter the details of the Search in the 'Select Tags' pop-up window:  
(Displays top 100 by NERC E-tag- select as many or few as needed)

- NERC e-Tag
- Capacity
- Sink Area
- Start/Stop Date
- Generator Name
- Point of Delivery
- Balancing Authority
- Load Serving Entity
- Misc. Field (RPS\_ID)

Search form fields:

- NERC E-Tag:
- Capacity:
- Sink Area:
- Start Date: 2008-01
- Stop Date: 2008-01
- Generator Name:
- Point Of Delivery:
- Balancing Authority:
- Load Serving Entity:
- Miscellaneous Field:

Search button:

Select 'Search'

Total Selected Capacity: 800  
1 NERC E-Tags found.

Selected	NERC E-Tag	Capacity	Sink Area	Start Date	Stop Date	Generator Name	Point Of Delivery	Balancing Authority	Load Serving Entity	Miscellaneous Field
<input checked="" type="checkbox"/>	PAT_DPSEGENPSES_CISO	800	SDG3_SP15	2008-01-15T13:00:00Z	2008-01-20T13:00:00Z	BPPOWER	SDG3_SP15	CISO	SCE01	RPS_ID123456/WinGenOregon

Save Cancel

5

In the same 'Select Tags' pop-up window  
-Select the **NERC e-Tag(s)**  
-Select **Save**



# Certificate Retirement: Imported NERC e-Tags

6

On the 'Transfer Certificates' screen, verify the correct batch(es) and amount(s) have been selected (**Transfer Quantity, Generating Unit(s) and Generation Month(s), NERC e-Tag(s)**), if needed make changes.

Select 'Submit' (User will be asked to confirm action)

Transfer Certificates																						
Certificate Serial Numbers	Quantity	Transfer Quantity	Generator Plant/Unit Name	Fuel Type	Vintage	Arizona	British Columbia	California	Colorado	Montana	Nevada	New Mexico	Texas	Washington	Oregon	Alberta	Utah	Green-Energy Eligible	Ecologo Certified	Hydro Certification	SMUD Eligible	NERC E-Tag Matched
10-CA-51-36 to 37	2	2	KG Ocean 1 - KG Ocean 1	Ocean	2007/07	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No

Transfer  certificates to:

Another Account Holder  
Select an Account Holder:   
Transfer Execution Date (Optional):

Active

Reserve  
Select a reserved subaccount:   
Reason:  Free Text:

Retirement  
Default - 36  
Retirement Type\*:   
Retirement Details:  
 Used by the Account Holder for a State-Regulated Utility Renewable Portfolio Standard/Provincial Utility Portfolio Standard:  
State/Province\*:   
RPS Compliance Period\*:   
Reason\*:   
NERC E-Tags:   
Associated:   
  
Additional Details:   
Reason:   
Additional Details:   
Reason:   
Compliance Period:   
Reason:   
Additional Details:   
Reason:   
Additional Details:   
Reason:   
Additional Details:   
Retirement Reason:

Used by the Account Holder for a Municipal Renewable Portfolio Standard:  
 Used by the Account Holder for Other Regulatory Program:  
 Used by the Account Holder for a Utility Green Pricing Program:  
 Used by the Account Holder for a Green Electricity Product:  
 Used by the Account Holder for a REC-Only Product:  
 Other:

Compatible Tracking Systems\*:   
Account ID\*:   
Account Name\*:

Export  
 Bulletin Board

Warning: Leaving this page while a certificate transfer process may result in the transfer not completing correctly.

Retirements are FINAL. Check with your State/Provincial/Voluntary Program Administrator for specific RPS requirements.



## *NERC e-Tags:*

## *Review*

- Contact WREGIS Administrator with PSE codes to be pulled
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## *NERC e-Tags:*

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- To determine the imported NERC e-Tags to match or retire download your NERC e-Tags Summary Report.
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- 'Select Tags' pop-up window displays top 100 by NERC E-tag



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