



WECC

WREGIS Operating Rules Change Summary

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Electric Reliability and Security for the West

Purpose

WECC will be upgrading to new WREGIS software in late September 2022. As part of this effort, we reviewed our existing governing documents for needed changes to ensure consistency with the new software and the requirements of our new software provider. One of the documents we reviewed was the WREGIS Operating Rules, which was last updated in January of 2021. Due to the number of changes to the Operating Rules, this summary document is meant to provide information about the types and reasons for various changes.

Types of Changes

The changes in the Operating Rules look extensive but generally fall into a few categories:

1. WECC removed references to documents that are being or have been phased out. For example, WECC had replaced Interface Control Documents with training materials to give the same type of information in a more usable format.
2. WECC removed mention of functions that are in the current system but will not be in the new software. WECC also added sections regarding new functionality that will be available with the upgrade. See the section below for more information.
3. WECC updated various vocabulary or word choices to reflect those being used in our new system, such as replacing Account Holder with Customer.
4. WECC updated and improved language, word choice, and presentation to increase readability and clarity and to remove references that are more appropriately covered elsewhere.
5. WECC deleted or updated various defined terms that were not being used in this document or whose definition did not match current WECC or WREGIS definitions.
6. WECC has deleted some appendixes and will now house that information on its website to ensure it is kept up to date.
7. WECC removed blank sections and appendixes.

Substantive System Functionality Changes to the Operating Rules

1. For data that passes all validation checks, WREGIS Certificates will now be issued 14 days after generation data is reported or upon customer acceptance, whichever occurs first. Generation data that requires WREGIS Administrator acceptance due to a validation check failure or fuel

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allocations will not issue certificates until those conditions are satisfied. Various changes have been made to the document for consistency with this new issuance timeline.

2. If certificates have been issued for generation data that require an update, the batch may qualify for an issuance roll-back if no transactions have occurred. Additional details can be found in Section 9.3.2.
3. All references to Generating Unit Classifications have been removed, and reporting requirements have been standardized. Going forward, the nameplate size and generation type (Wholesale, Wholesale Also Serving On-Site Load, or Customer-Sited Distributed) of a Generating Unit will determine eligibility for exceptions specified in the Operating Rules.
4. Multi-fuel Generating Units will still require fuel allocations in the new system, but the 90-day timeline associated with the old issuance cycle will no longer apply. Certificates will sit in a “Pending” status until the Customer has provided the required allocations.
5. Organizations will now be able to set-up more than one user with rights to manage the Organization. While there will no longer be a single “Account Manager,” WREGIS will require a Primary Contact for each organization. This will default to the Account Manager listed in the WREGIS Organization at the time of release but can easily be updated later.
6. Users will now have a single login that applies to all Organizations to which they have been granted permissions. All logins will now be permission-based (None, Read, Manage), rather than role-based, with the ability to restrict by Account (Sub-Account) within an Organization if desired. The ability to restrict users by Generating Unit will no longer be available. Users who have active Organizations in M-RETS and WREGIS will use the same login for both.
7. WREGIS has changed the registration approval deadline for Generating Units seeking Test Energy from 75 days to 90 days to be more consistent with vintage cycles.
8. Standing Orders will no longer be available as an automated certificate transfer type. The Recurring Certificate Transfers available in the system will function similarly to current Forward Transfer functionality.
9. References to the Certificate Serial Look-up functionality have been removed, as this will not be available going forward.

WECC believes that these changes are needed to provide an updated, functionally accurate document.

