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WREGIS Training Objectives

By the end of the training, participants will leave with:

− An understanding of the purpose of WREGIS; and

− The ability to access, navigate, and execute core functions in WREGIS.
Western Renewable Energy Generation Information System

An independent, renewable energy registry, and tracking system for the Western Interconnection.

WREGIS has two components:
1. Proprietary information system (software)
2. Administrative operations housed at WECC
WREGIS Overview: Objectives

Provide an institution in the West that manages renewable energy Certificates used to verify compliance with regulatory and voluntary programs by:

• Remaining policy-neutral;
• Using independent, verifiable, and reliable data;
• Protecting against double-counting to increase credibility and consumer confidence; and
• Facilitating market participation with commercial trading of WREGIS Certificates.
WREGIS Overview: What is a WREGIS Certificate?

• A WREGIS Certificate is an electronic record of reported generation and its attributes.
• WREGIS creates one Certificate for each MWh of eligible energy.
• WREGIS Certificates include both static information (Generating Unit) and dynamic information.
  - Total Certificates (MWh)
  - Facility location
  - Generating technology
  - Fuel type
  - Nameplate capacity
  - Month/year of generation
  - Program eligibilities
This example shows the fields on a Certificate and is not an accurate illustration of static and dynamic information. Data fields on a Certificate are outlined in the WREGIS Operating Rules. Appendix B-1 is located on the official WECC website at www.wregis.org.

Certificate Data
WREGIS Generating Unit ID: W1234
Generating Unit Name: ABC Company
Primary Facility Name: ABC Company
Vintage Month: 8
Vintage Year: 2015
Certificate Serial Numbers: 1-AB-23-45 to 45
Total Certificates: 1
Generation Period Start Date: 08/01/2015
Generation Period End Date: 08/31/2015
Certificate Creation Date: 11/30/2015

Static Generating Unit Data
Facility County: ABC County
Facility State or Province: CA
Facility Country: US
Multi-Fuel Generator Indicator: No
Generation Technology/Prime Mover: Wind
Fuel Type/Energy Source: Wind
Fuel Source/Other Criteria or Eligibility Characteristics: Wind-Wind*-Wind*

See Certificate Creation and Issuance section for a full example.
WREGIS Overview: System Users

- Account Holder (AH)
- Program Administrator (PA)
- Qualified Reporting Entity (QRE)
- WREGIS Administrator
# WREGIS Overview: System Users

<table>
<thead>
<tr>
<th>Account Holder</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Generator Owners</td>
<td>• Account/Generating Unit registration and management</td>
</tr>
<tr>
<td>• Load Serving Entities</td>
<td>• Sub-Account management</td>
</tr>
<tr>
<td>• Brokers</td>
<td>• Self-reporting generation data entry (limitations apply)</td>
</tr>
<tr>
<td>• Marketers</td>
<td>• Generation data review and approval</td>
</tr>
<tr>
<td>• Any entity who wants to create, use, buy, and/or sell Certificates</td>
<td>• Allocations: Fuel Type and Aggregated Meter</td>
</tr>
<tr>
<td></td>
<td>• Certificate management and transfers</td>
</tr>
</tbody>
</table>
WREGIS Overview: System Users

<table>
<thead>
<tr>
<th>Qualified Reporting Entity</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Balancing Authorities</td>
<td>• Generation data reporting</td>
</tr>
<tr>
<td>• Non-Balancing Authorities</td>
<td>• Account management</td>
</tr>
</tbody>
</table>
## WREGIS Overview: System Users

<table>
<thead>
<tr>
<th>Program Administrator</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• State</td>
<td>• Program eligibility verification for Generating Units</td>
</tr>
<tr>
<td>• Provincial</td>
<td>• Account management</td>
</tr>
<tr>
<td>• Voluntary</td>
<td></td>
</tr>
</tbody>
</table>
## WREGIS Overview: System Users

<table>
<thead>
<tr>
<th>WREGIS Administrator</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• WREGIS staff</td>
<td>• Account registration approval</td>
</tr>
<tr>
<td></td>
<td>• Generating Unit registration approval</td>
</tr>
<tr>
<td></td>
<td>• Login and password request management</td>
</tr>
<tr>
<td></td>
<td>• Verification of user compliance with WREGIS business processes</td>
</tr>
<tr>
<td></td>
<td>• Certificate issuance cycle and transfer transactions monitoring</td>
</tr>
<tr>
<td></td>
<td>• AH billing</td>
</tr>
<tr>
<td></td>
<td>• Admin system capabilities</td>
</tr>
<tr>
<td></td>
<td>• Help desk</td>
</tr>
<tr>
<td></td>
<td>• Manage system changes and perform user acceptance testing</td>
</tr>
<tr>
<td></td>
<td>• Support WREGIS Committee and Stakeholder Advisory Committee</td>
</tr>
</tbody>
</table>
Public Users

WREGIS Active Generators: A list of all active WREGIS Generating Unit's eligibility status in state or provincial or voluntary programs as well as other non-confidential information.

WREGIS Active Account Holders: A list of company and contact information for all active WREGIS AHs.

WREGIS Certificate Activity Statistics - Monthly/Annual: Shows Certificate issuance and transfer information for a specified period of time by month or year. Information can be pulled by Fuel Type, Fuel Source, State/Provincial Program, and Facility Ownership. Certain information may be blocked to protect confidentiality.

Bulletin Board: A place to post Certificate and contact information for posted Certificates. All Certificate information on the Bulletin Board is public.
WREGIS Core User Functions

All Users
- Add Account Logins and Update Login Permissions
- Customize 'My Account' Page
- Adding Sub-Accounts and Registering Generating Units
- Approve or Dispute Current Period Data/Self-Report Data
- Enter Fuel and/or Meter Generation Allocations
- View Certificate Information
- Dispute Prior Periods/Approve Adjustments
- Initiate or Approve/Reject Certificate Transfers

Account Holder (AH)
- Register New WREGIS Account
- Upload Current Period Data
- Apply Adjustments for Current Period Data
- Report and/or Adjustments for Prior Period Data
- Validate Generating Unit Program Eligibilities

Qualified Reporting Entity (QRE)
- Add Account Logins and Update Login Permissions
- Customize 'My Account' Page
- Adding Sub-Accounts and Registering Generating Units
- Approve or Dispute Current Period Data/Self-Report Data
- Enter Fuel and/or Meter Generation Allocations
- View Certificate Information
- Dispute Prior Periods/Approve Adjustments
- Initiate or Approve/Reject Certificate Transfers

Program Administrator (PA)
- Register New WREGIS Account
- Upload Program Eligibilities
- Validate Generating Unit Program Eligibilities
- Apply Adjustments for Current Period Data
- Report and/or Adjustments for Prior Period Data
## Getting Started in WREGIS: System Requirements

<table>
<thead>
<tr>
<th>Recommended Browsers</th>
<th>Reduced Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chrome</td>
<td>Internet Explorer</td>
</tr>
<tr>
<td>Firefox</td>
<td>Microsoft Edge</td>
</tr>
<tr>
<td></td>
<td>Safari</td>
</tr>
</tbody>
</table>
Getting Started in WREGIS: WREGIS System

- Access the WREGIS system at [www.wregis.org](http://www.wregis.org).
- Click the 'WREGIS Login' button to access the WREGIS system.

![WREGIS Login Button](image)
• Existing Users
  - Log in to WREGIS.

• New Users
  - Click 'Not a Member? Register Here' to register a new account.

• Login Trouble?
  - Click 'Trouble logging in?'

• Public Message Notification
Getting Started in WREGIS: New Account Registration

Once the WREGIS system is accessed, the WREGIS Login page will be displayed.

1. Click 'Not a Member? Register Here'.
2. Select a User Type from the pop-up window:
   - Account Holder
   - Qualified Reporting Entity
   - Program Administrator
3. Click 'I ACCEPT' to agree to the terms.
Getting Started in WREGIS: New Account Registration

AH

- New users complete the 'New Account Registration' form.
- Multiple Account Type options are available per account (check all that apply).
• Invoices are only sent to the 'Billing Email' unless a hard copy is requested.

• Understand your company's billing process:
  - Who needs to receive the email?
  - Do you require a purchase order number for processing?
Getting Started in WREGIS: New Account Registration

• The 'Account Manager Information' is used as the main point of contact for all emails and notifications.
• Each WREGIS Account Manager must:
  – Be an individual.
  – Have a singular contact name and email address.
    • This cannot be a group or department email address.
• Before a WREGIS account can be approved, you must submit the first annual fee and a signed Terms of Use.
Getting Started in WREGIS: New Account Registration

### QRE

**New Account Application**

<table>
<thead>
<tr>
<th>Account Type: *</th>
<th>(Check all that apply)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Non-Balancing Authority Reporting Entity</td>
</tr>
<tr>
<td></td>
<td>Balancing Authority</td>
</tr>
<tr>
<td></td>
<td>Non-Balancing Authority-Thermal</td>
</tr>
</tbody>
</table>

**Company Information**

<table>
<thead>
<tr>
<th>Company Name: *</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Address1: *</td>
<td></td>
</tr>
<tr>
<td>Company Address2:</td>
<td></td>
</tr>
<tr>
<td>Company City: *</td>
<td></td>
</tr>
<tr>
<td>Company Country: *</td>
<td>US</td>
</tr>
<tr>
<td>Company State/Province: **</td>
<td>Select One</td>
</tr>
<tr>
<td>Company Zip/Postal: *</td>
<td></td>
</tr>
<tr>
<td>Company Telephone: *</td>
<td></td>
</tr>
</tbody>
</table>

### PA

**New Account Application**

<table>
<thead>
<tr>
<th>Account Type: *</th>
<th>(Check all that apply)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>State Program Administrator</td>
</tr>
<tr>
<td></td>
<td>Voluntary Program Administrator</td>
</tr>
<tr>
<td></td>
<td>Voluntary Program Administrator - Greene</td>
</tr>
<tr>
<td></td>
<td>Voluntary Program Administrator - Low Impact</td>
</tr>
</tbody>
</table>

**Company Information**

<table>
<thead>
<tr>
<th>Company Name: *</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Address1: *</td>
<td></td>
</tr>
<tr>
<td>Company Address2:</td>
<td></td>
</tr>
<tr>
<td>Company City: *</td>
<td></td>
</tr>
<tr>
<td>Company Country: *</td>
<td>US</td>
</tr>
<tr>
<td>Company State/Province: **</td>
<td>Select One</td>
</tr>
<tr>
<td>Company Zip/Postal: *</td>
<td></td>
</tr>
<tr>
<td>Company Telephone: *</td>
<td></td>
</tr>
</tbody>
</table>
Getting Started in WREGIS: Account Status Changes

Only the WREGIS Administrator may change the status of an account:

• Upon initial registration approval;
• At the request of the Account Manager; or
• When compliance with WREGIS policies are in question.
Account Managers are responsible for updating all Account information (company, billing, and main contact).

• To change Account Registration information, click 'Change Profile' in the 'Registration' module.

• Contact WREGIS to change the Account profile by someone other than the current 'Account Manager' or any grayed-out fields.
• The Account Manager is responsible for creating new logins and setting/maintaining login privileges.

• Each WREGIS user **must**:
  - Have their own login.
  - Have a corresponding user contact name and email address.
    - This cannot be a group or department email address.

• Passwords will change every 120 days.

• 16 previous passwords are saved.
Getting Started in WREGIS: Creating a Login

To create a new login:

1. Go to the 'Account Management' module and click 'Review/Edit/Add Logins'.
Select one of the two login types:

1. **Company**: for those who work within the A's company or organization.

2. **3rd Party Agent**: for those who are employed outside the A's company or organization.
   - A must complete and submit the 'WREGIS Agent Designation' form for approval by the WREGIS Administrator.
Check privilege boxes, and click 'OK'.
Getting Started in WREGIS: Changing Login Privileges

When logins are created, WREGIS assigns limited default privileges. To grant additional system privileges:

1. Click 'Review/Edit/Add Logins' in the 'Account Management' module.

2. On the Login page, find the 'Login Name' to modify and click 'Edit' in the 'Edit Facility/Sub-Account Privileges' column.
Getting Started in WREGIS: Changing Login Privileges

3. On the 'Privilege Login Management' page, check boxes for additional privileges, and click 'OK'.

<table>
<thead>
<tr>
<th>Privilege Login Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login Name: julie</td>
</tr>
<tr>
<td>Generation Privilege Login Management</td>
</tr>
<tr>
<td>Can Create New Facility: □</td>
</tr>
<tr>
<td>Allow Mass Certificate Transfer: □</td>
</tr>
<tr>
<td>Active Generator Plant-Unit Name</td>
</tr>
<tr>
<td>Select All □</td>
</tr>
<tr>
<td>KG BIO1</td>
</tr>
<tr>
<td>Sub-Account Privilege Login Management (Certificate Management and Maintenance)</td>
</tr>
<tr>
<td>Select All □</td>
</tr>
<tr>
<td>Open Sub-Accounts</td>
</tr>
<tr>
<td>Default - 32 - Reserve</td>
</tr>
<tr>
<td>Default - 33 - Retirement</td>
</tr>
<tr>
<td>Julie's Recs - 153 - Active</td>
</tr>
<tr>
<td>Solar Recs - 31 - Active</td>
</tr>
<tr>
<td>testing - 159 - Active</td>
</tr>
<tr>
<td>Sub-Account View Only</td>
</tr>
<tr>
<td>□</td>
</tr>
</tbody>
</table>
WREGIS takes security seriously

- Login names and passwords in WREGIS cannot be shared. Each user within a WREGIS account must have their own login name and password.
  - Only one email address is allowed per login.
  - Emails listed under login names cannot be shared email addresses (e.g., a group email box).
- The WREGIS system times out after 20 minutes.
- Emails should not contain screenshots of the WREGIS system unless specifically requested by WREGIS staff.
Modules and Reports

All WREGIS Users share common system modules:

• Public Reports
• Account Information
• Home (hover over hyperlink)
  – Customize My Page
  – Change Password
  – Logout
Customize your landing page by hovering over 'Home' and clicking 'Customize My Page'.
• Add and remove modules via checkbox.
• Re-sequence the page layout using up/down arrows.
• Change Display Order/Type.
• Only modules for the User's Account type and Login permission are displayed.
Account Manager modules:

• Registration:
  - Change Profile
  - EMA Link Setup
    • Used by AHs who have also contracted with APX for additional tracking system services.

• Account Management:
  - Review/Edit/Add Logins
    • User Login Type
    • Permission Levels
AH modules:
- Account Summary
- Open Sub-Accounts
- Asset Management (see next slide)
- My Actionable Generating Units/Data*
- Account Information*
- Account Holder Reports*
- Standing Orders Inbox*
- Forward Transfers Inbox*
- Recurring Transfers*
- Inbox/Outbox*:
  - One-time Certificate Transfers

*Not shown
Use the 'Asset Management' module to complete the following tasks:

- View/Update 'Generator Information' (registration form)
- View 'Review Data/Self-Report' screen:
  - Review Generation Data
  - Accept/Dispute Generation Data
  - Enter Fuel Splits
- View 'Generation Activity Log'
- Enter Meter Splits
- Register New Generator
- Request Assignment or Transfer
**Certificate Transfer History**: Provides log information on every Certificate Transfer conducted through the life of the Account, including transfer dates.

**My Generation Activity Log**: Provides history of Generation Data information loaded for Generating Units registered to the WREGIS Account as it moves through the Certificate issuance cycle.

**State/Provincial/Voluntary Compliance Report**: Provides certificate batch information in open Retirement Sub-Accounts. (PAs may view this information if given permission by the AH.)

**My Actionable Generating Units/Data**: Provides AHs with a list of actions they may need to take.

**Generation Uploaded by Facility**: Provides generation data reported for a specific Generating Unit.

*Partial list of AH reports.*
Modules and Reports: Qualified Reporting Entities

QRE modules:

• Meter Data Loading
• Reporting Entity Reports
  – **My Event Log**: Provides activity information for all transactions conducted in the account.
  – **Generation Uploaded by Vintage**: Provides generation data by Vintage period.
  – **Generation Uploaded by Facility**: Provides generation data reported for a specific Generating Unit.

![Screenshot of QRE interface showing My Event Log, Generation Uploaded by Vintage, and Generation Uploaded by Facility]
PA modules:
- Program Eligibilities
- My State/Provincial/Voluntary Program Reports (see next page)
WREGIS Generators Program Eligibility:
Shows Generating Unit eligibility status in State, Provincial, or Voluntary Programs.

WREGIS Account Holders: Provides a list of company and contact information for all active WREGIS AHs.

Certificate Serial Number Look-up: Provides Certificate batch information by Generating Unit/AH.

State/Provincial/Voluntary Compliance Report: Provides certificate batch information in open Retirement Sub-Accounts. (PAs may view this information if given permission by the AH.)

Closed Accounts – Partial MWh: Shows partial MWh not converted into WREGIS Certificates once an account is closed.

My Event Log: Provides activity information for all transactions conducted in the account.
Sub-Accounts – AH

• Certificates are deposited in designated Sub-Accounts.

• WREGIS creates three default Sub-Accounts, each with a unique function and purpose:
  – **Active**: Holds Certificates prior to usage or transfer.
  – **Retirement**: Holds Certificates used for compliance or other purposes.
  – **Reserve**: Holds Certificates sold 'off-system' without making claim about current certificate status.

• Each Sub-Account is assigned a unique ID.
Sub-Accounts – AH

• Additional Sub-Accounts can be created for certificate management.
  - The maximum number of open Sub-Accounts per type are: 200 Active, 10 Reserve, and 100 Retirement.

• Sub-Account creation and management are initiated from the 'Open Sub-Accounts' module.

• Sub-Accounts may be opened or closed
  - Before closing an Active Sub-Account, assigned Generating Units, and transfer transactions must be reassigned to other Active Sub-Accounts.
Sub-Accounts – AH: Names

- Active Sub-Account names can be changed as needed.
- Retirement and Reserve Sub-Account names cannot be changed.
Sub-Accounts – AH: Additions

1. Click 'Create New Sub-Account' from the 'Open Sub-Accounts' module.

2. Select Sub-Account type, mark Open 'Yes', enter required information, and click 'Create'.
Sub-Accounts – AH: Additions

The new Sub-Account is added to the 'Sub-Accounts Summary' page and 'Open Sub-Accounts' module.

![Image of Open Sub-Accounts - Active Type table]

- Sub-Account ID 176, Sub-Account Name 10, Type Active, Certificates 0
- Sub-Account ID 4, Sub-Account Name Default, Type Active, Certificates 363
- Sub-Account ID 71, Sub-Account Name Internal Transfers, Type Active, Certificates 5

[Links to Create New Sub-Account and View/Edit Sub-Accounts]

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Sub-Accounts – AH: View/Edit/Close

1. Click the 'Sub-Account Name'.

2. Update information
   • Change name/alias
   • Open/close Sub-Account
   • Re-assign Generating Units and transfer transactions.

3. Click 'Save'.

• Generating Units (GU) must be registered and approved in WREGIS before data reporting and certificate creation can begin.

• GUs may be registered by an AH that has the rights to the environmental attributes and/or the rights to register the generating unit.

• Registration must be completed for each Generating Unit or facility assigned to a single revenue meter.
**Generating Units – AH: Registration**

- QREs and PAs are selected during Generating Unit Registration. Selection is available only if QREs and PAs have approved WREGIS accounts.
  - QREs and PAs can only view units in 'Approved' status.
  - The unique reporting entity unit ID is assigned by the QRE.
- Contact the PA directly about program eligibility.
• A Generating Unit is assigned to an Open, Active Sub-Account during the Generator Registration process.

• Each Generating Unit is assigned to one Sub-Account.
  – Multiple Generating Units may be assigned to each Sub-Account.

• For WREGIS to approve a unit, the AH must submit the appropriate verification documentation outlined in the 'Generating Unit Registration Guide' under the 'Registration' header at www.wregis.org.
Generating Units are registered by an AH.

1. Click 'Register New Generator' from the 'Asset Management' module.
Complete the two-page 'New Generator Registration' form (partial form displayed).

Click 'Submit for Approval'.
• The Generating Unit will be displayed in the 'Asset Management' module.

• After WREGIS Administrator approval, the status will change from 'Pending' to 'Approved'.
  
  - All verification documents must be submitted and accepted by the WREGIS Administrator for the unit to be reviewed for approval.
• To create another Generator with similar attributes, click 'Copy'.

• To edit Generating Unit Registration information, click the 'Generating Plant-Unit Name':
  - Any field can be modified prior to WREGIS Administrator approval.
  - Only select fields can be modified after WREGIS Administrator approval.
• Management of Generating Unit information and status is the AH's responsibility.

• AHs are required to annually review and update Generating Unit information.
  – Failure to complete the annual review will lead to generator suspension and possible loss of certificate eligibility.
  – Reminder emails are sent to the AH prior to the review date.
  – Updates can be made anytime during the year, though an annual review will still be required.
Generating Units – AH: Management

• Generating Unit Statuses include:
  - Approved
  - Inactive
  - Pending
  - Needs Info
  - Rejected
  - Suspend Certificate Issuance
  - Terminated

• Only Generating Units in 'Approved' status are eligible for Certificates.

• To close a Generating Unit, the A must send a request to the WREGIS Administrator.

• To transfer a Generating Unit from one A to another, a request must be made through the WREGIS system.
• Small-Scale Aggregation Group (SSAG) registrations allow AHs to register large numbers of small (less than 50 kW), customer-sited distributed Generating Units under a single Generating Unit registration in WREGIS.

• Participation in Small-Scale aggregation requires pre-approval by the WREGIS Administrator.

• For more information, see Appendix F of the WREGIS Operating Rules and contact WREGIS directly.
Generating Units – AH: Cogeneration Electricity/Thermal

- Cogeneration Electricity/Thermal registrations allow AHs to register a facility that generates both electricity and thermal energy that is used for a secondary purpose.

- The facility and its thermal energy must be recognized as renewable and eligible by one or more state, provincial, voluntary programs located in the WECC footprint.

- The use of this type of registration requires a state, provincial, or voluntary program to provide WREGIS with program approval documentation. For more information, see Appendix G of the WREGIS Operating Rules.
Program Administrators and Eligibilities
A PA is selected by an AH during the Generating Unit Registration process.

PAs may verify eligibilities only for the selected Generating Units.

Program Eligibility information is included on Certificates.

PAs have two options to verify and/or submit changes to a Generating Unit’s eligibility status:

1. Uploading a program eligibility file into WREGIS.
2. Validating program eligibility directly in WREGIS.

Program Administrators and Eligibilities: Verification

Option 1 – Upload:
1. User creates Eligibility file per WREGIS format.
2. From the Program Eligibility module:
   - Click 'Browse'.
   - Select the file from the User's computer or network.
3. Click 'Upload'.

![Program Eligibilities screenshot](image-url)
Option 2 – Direct:
1. Click the 'Generating Plant-Unit Name' from 'Program Eligibility' module.
2. Enter details of Program Eligibility.
3. Click 'Save'.
Current Period Reporting - QRE and Acceptance - AH
WREGIS Certificate Issuance Cycle

Generation output reporting: From Day 1 to Day 75, generation can be reported.

Generation output approval and current period adjustments: From Day 1 to Day 82, the reported data can be accepted, disputed, or adjusted.

Quiet period: From Day 83 to Day 89, disputes may be logged, although no changes/adjustments can be posted.

Certificate creation and issuance: On Day 90, Certificates are created and issued.

Prior periods/adjustments: Between Day 90 and Day 730, prior periods and adjustments to previously reported data can be reported.

Certificate issuance cycle begins the first day after the end of the current period generation month.
WREGIS Certificate Issuance Cycle – QRE

Certificate issuance cycle begins the first day after the end of the current period generation month.
Current Period Reporting – QRE

• QREs and self-reporting AHs report current period generation data in WREGIS.

• Only the QRE who is listed on the Generating Unit registration form may report data for the Generating Unit.

• One WREGIS Certificate is created for each MWh of eligible energy.

• Fractional generation (partial MWh) is carried over into next period.
• Reporting of the current period data begins the first day after the generation month ends.

• Reporting frequency and method is determined by the Generating Unit classification:
  – A through H are required to have data reported by a QRE.
  – I or J data may be reported by the AH or by a QRE.
# WREGIS Generating Unit Classifications

## Generating Unit Capacity and Existing Contract Determinants

<table>
<thead>
<tr>
<th>Generating Unit Classification</th>
<th>Generation Reported to a Balancing Authority on a Unit-Specific Basis</th>
<th>Generation Not Reported to a Balancing Authority on a Unit-Specific Basis</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Wholesale Generation</td>
<td>Wholesale Generation Also Serving On-Site Load</td>
</tr>
<tr>
<td>No Determinants - Classification applies to any Generating Unit whose generation is reported to or through a Balancing Authority on a Unit-Specific basis</td>
<td>Class A</td>
<td></td>
</tr>
<tr>
<td>Nameplate Capacity greater than 125 kW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nameplate Capacity less than or equal to 125 kW</td>
<td>Class B</td>
<td></td>
</tr>
<tr>
<td>Where data collection only allows meter reading and reporting less frequently than monthly. Class must be approved by WREGIS</td>
<td></td>
<td>Class C</td>
</tr>
<tr>
<td>Nameplate Capacity greater than 125 kW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nameplate Capacity less than or equal to 125 kW</td>
<td>Class D</td>
<td></td>
</tr>
<tr>
<td>Where data collection only allows meter reading and reporting less frequently than monthly. Class must be approved by WREGIS</td>
<td></td>
<td>Class E</td>
</tr>
<tr>
<td>Nameplate Capacity greater than 360 kW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nameplate Capacity less than or equal to 360 kW and with an annual production technically capable of exceeding 30 MWh per year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nameplate Capacity less than or equal to 360 kW and with either an annual production technically not capable of exceeding 30 MWh per year or where data collection only allows meter reading and reporting less frequently than monthly</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

QRE Required for Data Reporting
Data Reporting: Data Validity Check

• The system performs a data validity (feasibility) check each time generation data is uploaded.
  – If data fails feasibility, WREGIS will attempt to resolve the issue with the QRE and/or the A.
  – Additional data or documentation may be requested by WREGIS to support the reported generation.

• Certificates will only be issued if all outstanding questions and concerns regarding feasibility are resolved.
Data Reporting – QRE: Upload csv File

<table>
<thead>
<tr>
<th>Column:</th>
<th>UNITID</th>
<th>Vintage</th>
<th>BeginDate</th>
<th>EndDate</th>
<th>TotalMWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Format:</td>
<td>Text</td>
<td>MM/YYYY</td>
<td>MM/DD/YYYY</td>
<td>MM/DD/YYYY</td>
<td>Decimal</td>
</tr>
<tr>
<td></td>
<td>32000</td>
<td>10/2006</td>
<td>10/01/2006</td>
<td>10/31/2006</td>
<td>4125.75</td>
</tr>
</tbody>
</table>

**UNIT ID**: Unique identifier for the unit assigned by its Reporting Entity.

**Vintage**: Month and year of generation, formatted MM/YYYY for any month in the current Reporting Period.
- The class of the Generating Unit determines the reporting frequency.
- One vintage per file.

**Begin Date**: Begin month-day-year of generation output period formatted MM/DD/YYYY. *(Must match the Begin Date of the Generation Period.)*

**End Date**: End month-day-year of generation output period formatted MM/DD/YYYY. *(Must match the End Date of the Generation Period.)*

**Total MWh**: Total MWhs for the Reporting Vintage.

Data Reporting - QRE: Upload

1. Create a csv data file per upload file format.

2. On the 'Meter Data Loading' module:
   - Select a current period 'Month/Year' from the dropdown list.
   - Click 'Browse' to select the file from Reporting Entity's computer or network.
   - Click 'Upload'.

![Meter Data Loading](image-url)
When the WREGIS system accepts the file, the data is written to the Generation Activity Log.

- WREGIS will assign the data a status of 'WREGIS Accepted' or 'Pending' (failed feasibility, Multi-Fuel, or both).
  - Failed feasibility requires WREGIS Admin review for approval.
  - Multi-Fuel requires AH to enter fuel allocation.
- A notification is sent to the AH to review the data for approval.
Self-Reporting Current Period Data – AH

• Self-Reporting As have two options to report current period generation data:
  1. **Upload** a csv file
  2. **Directly** onto the output screens

• Self-Reported data will not need to be accepted by the A.

• The A may re-report data (prior data will be over-written) if discrepancies are identified before Day 82.
Option 1 – Upload:

1. User creates csv file per WREGIS format.

2. On the 'Meter Data Loading' module:
   - Select a current period 'Month/Year' from the dropdown list.
   - Click 'Browse' to select the file from Reporting Entity's computer or network.
   - Click 'Upload'.
Option 2 – Direct

1. Click the hyperlink in the 'Review Data Self-Report' column on the 'Asset Management' module.

2. Click 'Add New Month'.
Enter required information:
- MWh/kWh quantity
- Begin/End date
  (Must match the Begin and End Dates of the generation period.)
- Fuel split allocation, if Generating Unit has more than one fuel type

Click 'Submit'.

Data is written to the Generation Activity Log:
- WREGIS will assign a status.
Certificate issuance cycle begins the first day after the end of the current period generation month.
The AH has up to Day 82 after the end of the current period reporting period to accept or dispute the reported data.

- If current period data is accepted, the data status changes to 'Account Holder Accepted'.

- If current period data is disputed, the status changes to 'Account Holder Disputed' and will not be included in certificate creation until the dispute is resolved.
To resolve the dispute, the QRE has up to Day 82 to load the correct data for the current period.

Between Day 83 and Day 89 (Quiet Period), data can continue to be disputed but not corrected until after certificate issuance.

If current period data is not accepted or disputed before Day 90, WREGIS will 'Auto-Accept' data unless data has failed feasibility or if fuel splits have not been allocated.
On the Asset Management module click one of the following two options:

- Option 1: Current period date hyperlink from the 'Review Data/Self Report' column; or

- Option 2: 'Generator Plant Unit Name' in the drop-down list and click 'Review Data/Self Report' button.
Accepting/Disputing Reported Data – AH

2. Click the 'Period Data Status' hyperlink.

3. On 'Accept/Dispute' screen:
   - Review reported data for accuracy.
   - Fuel split allocation, if Generating Unit has more than one fuel type.
   - Click 'Accept'.
Allocating Data for Multi-Fuel Units – AH

• Fuel types are selected during the Generating Unit Registration process.

• The A is required to enter a percentage allocation for each fuel type and vintage:
  - Allocations must equal 100%.
  - If the A is entering data via the self-reporting screens, the A may also enter the fuel allocations.
  - The allocation must be entered prior to Certificate creation (Day 90).
    - To allow time for potential feasibility issues to be addressed, it is recommended that allocations are entered at least ten days prior to Day 90.
• If multi-fuel allocation is not entered, the data will zero out and must be reloaded.

• AHs have two options to enter fuel allocations:
  1. Directly into the 'Self-Report/Unit Output Data' page.
  2. Using the 'Upload Multi-fuel/Aggregation Split' module (see the Account Holder Generation Multi-Fuel and Aggregated Meter Allocation Interface Control Document.)

• If the most recent multi-fuel methodology changes, the AH must provide WREGIS with updated documentation.
1. On the Asset Management module, click the current period date hyperlink from the 'Review Data/Self Report' column.

2. Click 'Period Data Status'.
Enter percentages for each Fuel Type; total percentage must equal 100%.

Click 'Accept' or 'Save'.

Self-Report/Unit Output Data Accept-Dispute

<table>
<thead>
<tr>
<th>Primary Unit ID - Name</th>
<th>W58 - GC - GC 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vintage</td>
<td>01/2019</td>
</tr>
<tr>
<td>MWh</td>
<td>60000</td>
</tr>
<tr>
<td>kWh</td>
<td></td>
</tr>
<tr>
<td>Begin:</td>
<td>1/1/2019</td>
</tr>
<tr>
<td>End:</td>
<td>1/31/2019</td>
</tr>
<tr>
<td>W58 - Fuel Type H2O:</td>
<td>0</td>
</tr>
<tr>
<td>W58 - Fuel Type IEH:</td>
<td>5.36</td>
</tr>
<tr>
<td>W58 - Fuel Type LHN:</td>
<td>94.64</td>
</tr>
<tr>
<td>W59 - Fuel Type H2O:</td>
<td>0</td>
</tr>
<tr>
<td>W59 - Fuel Type IEH:</td>
<td>5.36</td>
</tr>
<tr>
<td>W59 - Fuel Type LHN:</td>
<td>94.64</td>
</tr>
<tr>
<td>Dispute Reason:</td>
<td></td>
</tr>
<tr>
<td>Save</td>
<td></td>
</tr>
<tr>
<td>Accept</td>
<td></td>
</tr>
<tr>
<td>Dispute</td>
<td></td>
</tr>
<tr>
<td>Cancel</td>
<td></td>
</tr>
</tbody>
</table>
Allocating Data for Aggregated Meters - AH

• An aggregated meter is a collection of individual Generating Units sharing the same meter.

• Aggregated meters are set up during the Generating Unit Registration process.

• Generation data may only be reported for the Generating Units that are approved.

• Aggregated meter allocations may be entered for each Generating Unit in a current vintage.
  − Total percentages for each unit must equal 100%.
• AHs have two options to enter meter allocations:
  1. Directly into the 'Multiple Units to a Meter Percent Allocation' page.
  2. Using the 'Upload Multi-fuel/Aggregation Split' module (see the 'Account Holder Generation Multi-Fuel and Aggregated Meter Allocation Interface Control Document').

• If the AH does not enter an aggregated meter allocation, WREGIS will automatically assign a split based on pro rata nameplate capacity.
Allocating Data for Aggregated Meters - AH

1. On the 'Asset Management' module, click the hyperlink in the 'WREGIS Meter ID' column.

2. Select a current period 'Vintage' from the dropdown list.

3. Enter percentages for each Meter; total percentages must equal 100%, click 'Save'.

![Asset Management screenshot](image)

![Multiple Units to a Meter Percent Allocation screenshot](image)
### Allocating Data for Aggregated Meters - AH

<table>
<thead>
<tr>
<th>Column:</th>
<th>Unit ID</th>
<th>Vintage</th>
<th>Allocation Type</th>
<th>Allocated to</th>
<th>Allocation Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Format:</strong></td>
<td>WREGIS GU ID</td>
<td>MM/YYYY</td>
<td>Fuel or meter</td>
<td>Fuel type for fuel or unit ID for meter</td>
<td>Percentage (float)</td>
</tr>
<tr>
<td></td>
<td>or Reporting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Unit ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>W58</strong></td>
<td>10/2014</td>
<td>Fuel</td>
<td>IEH</td>
<td>5.34</td>
<td></td>
</tr>
<tr>
<td><strong>W58</strong></td>
<td>10/2014</td>
<td>Fuel</td>
<td>H2O</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td><strong>W58</strong></td>
<td>10/2014</td>
<td>Fuel</td>
<td>LHN</td>
<td>94.66</td>
<td></td>
</tr>
<tr>
<td><strong>A56789</strong></td>
<td>10/2014</td>
<td>Meter</td>
<td>W58</td>
<td>94.35</td>
<td></td>
</tr>
<tr>
<td><strong>A56789</strong></td>
<td>10/2014</td>
<td>Meter</td>
<td>W59</td>
<td>5.65</td>
<td></td>
</tr>
</tbody>
</table>

**Unit ID:** WREGIS GU ID, the unique Generating Unit number assigned by WREGIS or Aggregated Meter. Reporting Unit ID listed on the GU registration.

**Vintage:** Month and year of allocation, formatted MM/YYYY for any month in the current period generation month. One Vintage per file.

**Allocation Type:** Fuel or Meter.

**Allocated to:** Fuel type for fuel. Fuel type codes are listed in WREGIS Interface Control Document (ICD) or WREGIS GU ID for aggregated meter. The unique Generating Unit number assigned by WREGIS.

**Allocation Amount:** Percentage of each fuel or aggregated meter for the Reporting Vintage.

More details are outlined in the Account older Multi-Fuel and Aggregated Meter Allocation ICD located on the official WECC website, www.wecc.org/WREGIS or www.wregis.org.
1. Create allocation csv data file.
2. On the 'Upload Multi-fuel/Aggregation Split' module:
   - Use dropdown list to select MM/YYYY.
   - Click 'Browse' to select the file from AH's computer or network.
   - Click 'Upload' to load file into WREGIS.
Certificate Creation and Issuance
Certificate issuance cycle begins the first day after the end of the current period generation month.
Certificate Creation and Issuance

- On Day 90, Certificates are issued for the current reporting period and any scheduled prior period adjustments.
  - Certificates are issued for all whole MWh unit data.
  - Fractional MWh unit data will be carried over into the next issuance period.

- Certificate data is derived from Generating Unit Registration information and the data from the reporting period.

- Certificates are:
  - Created in batches with serial numbers.
  - Deposited in a designated Sub-Account or transferred to another A.

- The generation data status changes to 'Certificates Created'.
To access certificate information, select one of the following options:

a. On the 'Account Activity' module, click total certificate quantity for a Sub-Account type.

b. On the 'Open Sub-Accounts' module, click certificate quantity for a specific Sub-Account.
On the 'Certificates in Sub-Account' page, click the hyperlink in the 'Quantity' column.
This example shows the fields on a Certificate and is not an accurate illustration of static and dynamic information.

Data fields on a Certificate are outlined in the [WREGIS Operating Rules](https://www.wregis.org).

Appendix B-1 is located on the official WECC website at [www.wregis.org](http://www.wregis.org).

### Certificate Data

- **WREGIS Generating Unit ID:** W1234
- **Generating Unit Name:** ABC Company
- **Primary Facility Name:** ABC Company
- **Vintage Month:** 8
- **Vintage Year:** 2015
- **Certificate Serial Numbers:** 1-AB-23-45 to 45
- **Total Certificates:** 1
- **Generation Period Start Date:** 08/01/2015
- **Generation Period End Date:** 08/31/2015
- **Certificate Creation Date:** 11/30/2015

### Static Generating Unit Data

- **Facility County:** ABC County
- **Facility State or Province:** CA
- **Facility Country:** US
- **Multi-Fuel Generator Indicator:** No
- **Generation Technology/Prime Mover:** Wind
- **Fuel Type/Energy Source:** Wind
- **Fuel Source/Other Criteria or Eligibility Characteristics:** Wind-Wind*-Wind*

Continued on next page…
Date when Generating Unit first commenced operation: 01/02/2010
Nameplate Capacity: 0.921
Facility Operator Info: Company or Organization Name: ABC Corporation
Customer Sited Distributed Generation (Y/N): No
Reporting Entity Company or Organization Name: QRE Test1
Reporting Entity Type: Non-Balancing Authority Reporting Entity
Generating Unit in WECC Region Declaration Indicator (Y/N): Yes
Utility to which the Generating Unit is interconnected: ABC Company
Qualifying Facility Indicator (Y/N): No
Facility Ownership type: Other Non-Utility
California Supplemental Payment Received (Y/N): No
Facility receives state/provincial public benefit fund support indicator (Y/N): No
Federal Tax Credits received indicator (Y/N): No
Most recent FERC ydro license date, or: NA
One of the following from the following valid values: Non-jurisdictional, application pending, or not applicable: not applicable
Repowered Indicator (Y/N): No
Repower date: NA

Continued on next page…
### State/Provincial/Voluntary RPS Selections

<table>
<thead>
<tr>
<th>State</th>
<th>Eligible</th>
<th>Certification Number</th>
<th>Misc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona</td>
<td>Not Declared</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>British Columbia</td>
<td>Not Declared</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>California</td>
<td>Contact CEC</td>
<td>12345</td>
<td>NA</td>
</tr>
<tr>
<td>Colorado</td>
<td>No</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Montana</td>
<td>No</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Nevada</td>
<td>Not Declared</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>New Mexico</td>
<td>Not Declared</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Texas</td>
<td>No</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Washington</td>
<td>Not Declared</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Oregon</td>
<td>Yes</td>
<td>00sun000ca</td>
<td>NA</td>
</tr>
<tr>
<td>Alberta</td>
<td>Not Declared</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Utah</td>
<td>No</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>CA option2</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Green-e Energy Eligible: **Not Declared** Certification Number: NA Misc.: NA
Ecologo Certified, **No** Certification Number: NA Misc.: NA
Low Impact Hydro Certification: **No** Certification Number: NA Misc.: NA
SMUD Eligible: **No** Certification Number: NA Misc.: NA
eTag Matched: **No**
Summary: Current Period Reporting and Certificate Issuance

- Current Period Reporting begins the first day after the end of the current generation period and continues through Day 75.

- If multi-fuel allocation is not entered, the data will zero out and must be reloaded.
Summary:
Current Period Reporting and Certificate Issuance

• Allocations for aggregated meters may be entered each month (not required).

• If the A does not enter an aggregated meter allocation, WREGIS will automatically assign a split based on pro rata nameplate capacity.

• The A has *up to Day 82* to accept or dispute the reported data.
• Between Day 83 and Day 89 (Quiet Period), data can continue to be disputed but not corrected until after Certificate issuance.

• On Day 90, Certificates are issued for the current reporting period and any scheduled prior period adjustments.
  − Certificates are issued for all whole MWh unit data.
  − Fractional MWh unit data will be carried over into the next issuance period.
Prior Period Reporting and Adjustments
Certificate issuance cycle begins the first day after the end of the current period generation month.
Prior Period Reporting and Adjustments

• As may request an adjustment to prior generation periods up to Day 730.

• There is no limit to the number of times that data can be posted/re-posted during this period.
  – QREs may not be willing or able to report prior period adjustment data.
  – If the QRE has posted an adjustment more than two times, WREGIS advises the A to inquire with QRE.

• If generation data for a prior period was not previously reported, the data may still be reported as an adjustment.
Prior Period Reporting and Adjustments

• All adjustments for previously reported generation must be uploaded using a csv file in the 'Meter Data Loading' module.

• Adjustment amount should represent the total amount for the period, not the difference between previous reporting and correct amount.

• All adjustments are subject to the same feasibility and validity checks as current period reporting.

• Once an adjustment is posted, there is a 90-day window for the A to accept or dispute the data.
Prior Period Reporting and Adjustments

• 'Account Holder Accepted' data will schedule for next available creation date.

• Adjustment amounts will be written to database and any increases or decreases will be applied in the next available Certificate issuance cycle.
Certificate Transfers – AH

• Certificates can be transferred to:
  – Another AH
  – Export (Compatible Tracking System)
  – Internal Sub-Account
    • Active
    • Reserve
    • Retirement

• There are two types of Certificate Transfers:
  1. One-Time
  2. Recurring
    – Forward Transfer
    – Standing Order
Certificate Transfers – AH

• Transfers to another AH require the Transferee to 'accept' the transfer within 14 days.
• Transfers to an internal Sub-Account are immediately processed.
• Scheduled 'Accepted' transactions are executed daily.
• Certificate Transfers can be withdrawn or deleted by the Transferor:
  - Before the transaction is executed.
  - Anytime during the scheduled execution period for recurring transfers.
• If a Certificate batch is split, the batch cannot be recombined.
Certificate Transfers – AH: One-Time Transfer

1. In the Open Sub-Accounts module, click the Certificate quantity field in the open, Active Sub-Account.

2. On the 'Certificates in Sub-Account' page, click the advanced filter icon.
Certificate Transfers – AH: One-Time Transfer

3. Enter the filter details (select as many as needed):
   - Quantity
   - Generation Period
   - Unit
   - Fuel Type
   - Eligibilities

Click 'Filter'.
On the 'Certificates in Sub-Account' page, verify the correct batch(es) and amount(s) have been selected.

Click 'Batch Transfer'.
Certificate Transfers – AH: One-Time Transfer

Enter the details of the transfer:

• Select the 'Another Account Holder' radio button.
• Select Transferee from the dropdown list.
• If needed, enter transfer execution date. (not required)
  − If no date is entered, transfer executes immediately on acceptance by transferee.
  − If a date is entered, the transfer schedules for execution date on acceptance by transferee.
• Click 'Submit'.

An email and a notification will be sent to the Transferor and Transferee.
Certificate Transfers – AH: One-Time Transfer

Transferor Withdraws Transfer

• Click the hyperlink in the Outbox.
• On the next page, select the batch(es) to withdraw.
• Click 'Withdraw Selected'.

An email and a notification will be sent to the Transferor and Transferee.
Transferee Accepts or Rejects Transfer

- Click the hyperlink in the 'Inbox'.

- On the next page, select the batch(es) to 'Accept' or 'Reject'.

- Click 'Accept Selected' or 'Reject Selected'.

- If accepting, select an Active Sub-Account, and click 'Accept'.

An email and a notification will be sent to the Transferor and Transferee.
DEMO

One-Time Transfer
A Forward Certificate Transfer is a recurring transaction that requires the Transferor to have one or more Generating Units associated with the account.

Forward Certificate Transfers must specify the 'Begin Vintage' and 'End Vintage'.

The Transferor may choose to cancel the transfer at anytime before or during the execution of the transaction.
Certificate Transfers – AH: Forward Transfer

• Transferor may choose to prevent the cancellation of the transfer by checking the 'rescind' box
  – Legal action may be required to reverse this action.

• The Transferee must accept or reject the entire transfer transaction within 14 days from when the Transferor initiated the transaction, or the transfer will expire.

• If changes to the Forward Transfer are saved by the Transferor, the Transferee will need to reaccept the transfer within 14 days.
  – Must be accepted prior to REC creation
In the 'Recurring Transfer' module, click 'Create New Forward Transfer'.

<table>
<thead>
<tr>
<th>Transfer Name/Alias</th>
<th>Counterparty</th>
<th>Type</th>
<th>Source</th>
<th>Vintage Begin Date</th>
<th>Vintage End Date</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>April to FPL</td>
<td>FPL Energy Power Marketing, Inc.</td>
<td>Forward Transfer</td>
<td>General Motors Corporation RC - General Motors Cor</td>
<td>1/2008</td>
<td>6/2008</td>
<td></td>
<td></td>
<td>Withdraw All</td>
<td>04/03/2008</td>
</tr>
<tr>
<td>RPS 2014</td>
<td>Bonneville Power Administration</td>
<td>Standing Order</td>
<td>General Motors Corporation RC - General Motors Cor</td>
<td></td>
<td></td>
<td>01/31/2013</td>
<td>02/28/2013</td>
<td>Reject All</td>
<td>01/16/2013</td>
</tr>
</tbody>
</table>
Enter the applicable details on the 'New Forward Certificate Transfer' page:

- Name/Alias (use unique and meaningful naming conventions)
- Another AH or Sub-Account
- Generating Unit(s)
- 'Fixed Amount' or 'Percentage'
- 'Begin Vintage' and 'End Vintage'
- Priority (sets in reverse order—the latest transfer entered is automatically prioritized as 1)
- 'All or Nothing' or 'Partial Fill'
Certificate Transfers – AH: Forward Transfer

Continue entering details:

- If a Retirement Sub-Account:
  - 'Select a reason' and additional details (contact PA for their specific instructions).

- If a Reserve Sub-Account:
  - 'Select a reason' and enter details in text field.

- 'Rescind' box (selection of this box will stop you from rescinding, deleting, editing, or changing this transfer (legal action may be required to reverse this action).

- Click 'Save'.

An email and a notification will be sent to the Transferor and Transferee.
Certificate Transfers – AH: Forward Transfer

The transfer will be displayed in the 'Recurring Certificate Transfers Review Report (Forward Transfers)' and the 'Recurring Transfers' module.
Certificate Transfers – AH: Forward Transfer

Transferor Deletes Transfer
From the 'Recurring Transfers' module:
• Click 'Transfer Name/Alias'
• Click 'Withdraw All'

An email and a notification will be sent to the Transferor and Transferee.
Transferee Accepts or Rejects Transfer

- Click 'Accept All' or 'Reject All' from the 'Forward Transfers Inbox'.
- If accepting transfer, select an Active Sub-Account and click 'Accept'.

A notification will be sent to the Transferor and Transferee.
Certificate Transfers – AH: Standing Order

• A Standing Order is a recurring transfer that requires the Transferor to have at least one open, Active Sub-Account.

• Standing Order Transfers must specify the 'Begin Date' and 'End Date'.

• The Transferor may choose to cancel the transfer at any time before or during the execution of the transaction.
Certificate Transfers – AH: Standing Order

- The Transferee can choose to accept or reject the first-occurrence and each subsequent transfer occurrence or the entire transfer transaction.
- The Transferee must 'accept' or 'reject' at least the first occurrence of the transfer transaction within 14 days of when the Transferor initiated the transaction, or the transfer will expire.
- If changes to the standing order are saved by the Transferor, the Transferee will need to reaccept the transfer within 14 days.
1. On the Recurring Transfers Module, click 'Create New Standing Orders'.

2. On the 'Create New Standing Order' page, select open Active Sub-Account as source of transfer, and click 'Save'.

---

**Certificate Transfers – AH: Standing Order**

**Steps:**

1. On the Recurring Transfers Module, click 'Create New Standing Orders'.
2. On the 'Create New Standing Order' page, select open Active Sub-Account as source of transfer, and click 'Save'.

**Example:**

- **Transfer Name/Alias:** April to PPL
- **Counterparty:** FPL Energy Power Marketing, Inc.
- **Type:** Forward Transfer
- **Source:** General Motors Corporation RC - General Motors Cor
- **Vintage Begin Date:** 1/2008
- **Vintage End Date:** 6/2008
- **Status:** Withdraw All

**Table Data:**

<table>
<thead>
<tr>
<th>Transfer Name/Alias</th>
<th>Counterparty</th>
<th>Type</th>
<th>Source</th>
<th>Vintage Begin Date</th>
<th>Vintage End Date</th>
<th>Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>April to PPL</td>
<td>FPL Energy Power Marketing, Inc.</td>
<td>Forward Transfer</td>
<td>General Motors Corporation RC - General Motors Cor</td>
<td>1/2008</td>
<td>6/2008</td>
<td>Withdraw All</td>
<td>04/03/2008</td>
</tr>
<tr>
<td>RPS 2014</td>
<td>Bonneville Power Administration</td>
<td>Standing Order</td>
<td>General Motors Corporation RC - General Motors Cor</td>
<td>01/31/2013</td>
<td>02/28/2013</td>
<td>Reject All</td>
<td>01/16/2013</td>
</tr>
</tbody>
</table>
Enter the applicable details on the 'New Standing Order Transfer' page:

- Name/Alias (use unique and meaningful naming conventions)
- Another AH or Sub-Account
- Generating Unit(s) or Fuel Type(s)
  - 'Fixed Amount' or 'Percentage'
- 'Begin Date' and 'End Date'
  - Corresponding to when Certificates will be in account.
- Priority (sets in reverse order – the latest transfer entered is automatically prioritized as 1)
- 'All or Nothing' or 'Partial Fill'
Continue entering details:

- If a Retirement Sub-Account:
  - Select reason and additional details (contact PA for their specific instructions).

- For a Reserve Sub-Account:
  - Select reason and enter details in to text field.

- 'Rescind' box (selection of this box will stop you from rescinding, deleting, editing, or changing this transfer (legal action may be required to reverse this action)

- Click 'Save'.

An email and a notification will be sent to the Transferor and Transferee.
Certificate Transfers – AH: Standing Order

The Standing Order will be displayed in the 'Recurring Certificate Transfers Review Report' and in the 'Recurring Transfers' module.

<table>
<thead>
<tr>
<th>Transfer Name/Alias</th>
<th>Priority</th>
<th>Source Sub-Account ID</th>
<th>Counterparty</th>
<th>Generator Plant-Unit Name</th>
<th>Fuel Type</th>
<th>Fixed</th>
<th>% Deposit Sub-Account ID</th>
<th>Status</th>
<th>Rescindable</th>
</tr>
</thead>
<tbody>
<tr>
<td>RPS 2014</td>
<td>1</td>
<td>Default - 4</td>
<td>Bonneville Power Administration</td>
<td>General Motors Corporation RC - General Motors Corporation</td>
<td>Solar</td>
<td>1</td>
<td>Rejected</td>
<td>Pending</td>
<td>Yes</td>
</tr>
<tr>
<td>GM - Biogas</td>
<td>2</td>
<td>10 - 176</td>
<td>Exergy Development Group</td>
<td>Biogas</td>
<td>100.00</td>
<td>Pending</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transfer Name/Alias</th>
<th>Counterparty</th>
<th>Type</th>
<th>Source</th>
<th>Vintage Begin Date</th>
<th>Vintage End Date</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>April to FPL</td>
<td>FPL Energy Power Marketing, Inc.</td>
<td>Forward Transfer</td>
<td>General Motors Corporation RC - General Motors Cor</td>
<td>1/2008</td>
<td>6/2008</td>
<td></td>
<td></td>
<td>Withdraw All</td>
<td>04/03/2008</td>
</tr>
<tr>
<td>RPS 2014</td>
<td>Bonneville Power Administration</td>
<td>Standing Order</td>
<td>General Motors Corporation RC - General Motors Cor</td>
<td>01/31/2013</td>
<td>02/29/2013</td>
<td>01/31/2013</td>
<td>02/29/2013</td>
<td>Reject All</td>
<td>01/10/2013</td>
</tr>
<tr>
<td>GM - Biogas</td>
<td>Exergy Development Group</td>
<td>Standing Order</td>
<td>General Motors Corporation RC - General Motors Cor</td>
<td>03/10/2019</td>
<td>02/23/2020</td>
<td>03/10/2019</td>
<td>02/23/2020</td>
<td>Pending</td>
<td>02/22/2019</td>
</tr>
</tbody>
</table>
Transferor Deletes Transfer
From the 'Recurring Transfers' module:
- Click 'Name/Alias'
- Click 'Delete'

An email and a notification will be sent to the Transferor and Transferee.
Transferee Accepts or Rejects Transfer
Click 'Accept First', 'Accept All', 'Reject First' or 'Reject All' from the 'Standing Orders Inbox'.
If 'Accept First' or 'Accept All' was selected, the A selects an open, Active Sub-Account, and clicks 'Accept'.

- If 'Accept First' was selected, the A will be required to 'accept' or 'reject' the next transfer occurrence(s) until the entire transfer transaction is either completely accepted or rejected.

A notification will be sent to the Transferor.
Certificate Transfers – AH: Standing Order

• If 'Reject First' or 'Reject All' was selected, the AH confirms the action by clicking 'OK'.
  - If 'Reject First' is selected, the AH will be required to 'accept' or 'reject' the next transfer occurrence(s) until the entire transfer transaction is either completely rejected or accepted.

A notification will be sent to the Transferor.
To view or edit Certificate transfer information, click 'View Forward Transfers' or 'View Standing Orders'.

On the 'Recurring Certificate Transfer Review Report', click 'Transfer Name/Alias'.

Recurring Certificate Transfers Review Report (Forward Transfers)

- **Transfer Name/Alias**: April to FPL
- **Priority**: 1
- **Counterparty**: FPL Energy Power Marketing, Inc.
- **Generator Plant-Unit Name**: General Motors Corporation RC - General Motors Cor
- **Fuel Type**: Solar
- **% Fixed**: 100.00
- **Deposit Sub-Account ID**: Withdraw All
- **Status**: Yes
- **Recindable**: Yes
On the 'Edit Forward/Standing Order Certificate Transfer' page, the Transferor can edit the transfer information by selecting 'Save'.

- If changes to the recurring transfer are saved by the Transferor, the Transferee will need to re-accept the transfer within 14 days.
WREGIS Fees – AH

• Payment of first annual fee is required prior to new WREGIS account approval.
• Volumetric Fees are billed monthly.
• Annual Fees are billed according to the account approval date.
• Remit check payments to WREGIS.
• Contact WREGIS for ACH payment instructions.
## WREGIS Fee Matrix

### Annual and Volumetric Fees

<table>
<thead>
<tr>
<th>Account Holder Types</th>
<th>Total GU Size Per WREGIS Account</th>
<th>Annual per Year</th>
<th>Issuance (Creation) / Transfer / Retire / Reserve / Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>GU Micro (Generating Unit Owner / Representative Only)</td>
<td>30 KW or Less</td>
<td>$50.00</td>
<td>No Certificate Fees</td>
</tr>
<tr>
<td>GU Small (Generating Unit Owner / Representative Only)</td>
<td>30 KW - 1 MW</td>
<td>$75.00</td>
<td></td>
</tr>
<tr>
<td>GU Medium (Generating Unit Owner / Representative Only)</td>
<td>1 MW - 10 MW</td>
<td>$100.00</td>
<td></td>
</tr>
</tbody>
</table>

One or more types below may be selected - the annual fee will remain $125.00 per year

1. GU Large (Generating Unit Owner / Representative Only)
2. Load Serving Entities (Municipal Utility, Irrigation District, Joint Power Authority, Investor-Owned Utility, Rural Electric Cooperative, Electric Service Provider)
3. Retail Marketers (Federal Marketer / Power Administrator)
4. Wholesale Marketers (Federal Marketer / Power Administrator)
5. Utility Aggregators
6. Generator Aggregators (Community Choice Aggregator)
7. Account Holder; Other (Broker, Public Interest Organisation, Tribal Organisation)

### Reports and Other Service Fees

<table>
<thead>
<tr>
<th>Report / Service Type</th>
<th>Email</th>
<th>Hardcopy</th>
<th>Monthly</th>
<th>Per Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized Report</td>
<td>$ 25.00</td>
<td>$50.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WREGIS Deliverability (eTag) User</td>
<td></td>
<td></td>
<td>$ 212.00</td>
<td></td>
</tr>
<tr>
<td>Change Control</td>
<td></td>
<td></td>
<td>Variable</td>
<td></td>
</tr>
<tr>
<td>Fuel and/or Aggregated Meter Modifications (per generator and vintage)</td>
<td></td>
<td>$ 75.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Failure to complete Generating Unit Annual Review (per generator)</td>
<td></td>
<td></td>
<td>$ 50.00</td>
<td></td>
</tr>
</tbody>
</table>
WREGIS Contact Information

www.wregis.org
Help Desk: 1-888-225-4213
wregishelp@wecc.org

Monday – Friday
8:00 a.m. – 4:30 p.m. (Mountain Time)