WREGIS System

e-Tag

User Training

Updated

February 2019
e-Tags: Overview

• The WREGIS e-Tag functionality is used to track proof of energy delivery as required by one or more regulatory bodies within the Western Interconnection
  • Contact your state Renewable Portfolio Standards (RPS) Administrator to determine whether you are required to use the functionality

• E-Tag information is pulled from the Western Interchange Tool

• The WREGIS e-Tag functionality allows this data to be uploaded into a WREGIS Account of the 'entity importing energy into the jurisdiction'
e-Tags: Adding Functionality

• Provide WREGIS Administrator the Purchasing-Selling Entity (PSE) code(s) to be pulled
  • A PSE code can only be added to an account profile by WREGIS staff
  • If you do not see a PSE code on the account profile, WREGIS will not pull the e-Tags
  • E-Tags can only be pulled going forward
• The AH will be assessed a monthly e-Tag Deliverability fee
  • Associated fees are located on page 2 of the WREGIS Fee Matrix & Definitions
  • Additional functionality upgrade fees may apply
e-Tags: Criteria - Required Format

• Required format to be used for the Physical Path:

Misc(Token/Value)

<table>
<thead>
<tr>
<th>RPS_ID</th>
<th>actual RPS ID number and letter suffix</th>
</tr>
</thead>
</table>

4
e-Tags: Criteria

• E-Tags not complying with the criteria will not be imported into WREGIS and will not be available for use in WREGIS-related functions
  • Contact your scheduler to ensure all information is entered correctly

• For schedules matching a Western Interconnection approved PSE list, the importing PSE will be identified using 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 Coordinated Universal Time (UTC)
**e-Tags: Criteria**

- Schedules with RPS_ID numbers found on:
  - The e-Tag Physical Path in the Misc (Token/Value) field
  - Any line of the e-Tag Physical Path but only on one line per e-Tag
    - If the 'RPS_ID' Miscellaneous token is found on more than one line of the physical path, then the e-Tag is excluded from being imported into WREGIS

- Once the 'RPS_ID' line is identified then the PSE on that line of the physical path is deemed to be the Importing Entity
  - One line of the physical path may contain up to ten 'RPS_ID' values and all ten of these values will continue to be sent to the WREGIS system as a single token
Importing e-Tags

• An e-Tag cannot be imported into your WREGIS Account if:
  • You are not an active WREGIS Account Holder
  • You do not see a PSE code on your WREGIS Account profile (e-Tags can only be pulled going forward)
  • Your e-Tags are not properly filled out by your schedulers
  • More than one entity enters a Token/Value (RPS_ID) on the same e-Tag using different lines on the Physical Path
e-Tag Summary Reports

• **Available Active e-Tags:** shows available e-Tags imported into the designated WREGIS Account

• **Inactive e-Tags:** shows e-Tags imported into the designated WREGIS Account that the Account Holder has inactivated

• **Matched e-Tags:** shows Matched e-Tags imported into the designated WREGIS Account that the Account Holder has matched to certificates

• **Transferred Matched e-Tags:** shows e-Tags matched to WREGIS certificates of the current holder of the certificates. Limitations apply to who (Account Holder) is privy to this information.

• **CA e-Tags:** shows e-Tags matched to WREGIS certificates in the WREGIS Account of the current holder of the certificates and the designated WREGIS Account where the e-Tags were initially imported and matched. Limitations apply to who (Account Holder) is privy to this information
e-Tag Summary Reports

In the 'Account Holder Reports' Module select the 'e-Tag Summary Report'

- Use the 'From Month' and 'To Month' dropdown lists to select the date range to display and then select the 'Go' button
- Select a report tab (Available Active, Inactive, Matched e-Tags, Transferred Matched e-Tags, or CA e-Tags)
Matching Certificates to Imported e-Tags
Matching Certificates to Imported e-Tags

- Only Account Holders who have had e-Tags imported into their WREGIS Account can match certificates to e-Tags.
- An e-Tag can only be transferred to another WREGIS Account Holder after it has been matched to a certificate.
- 'Match Tags' screen only displays 100 e-Tags.
- To determine the imported e-Tags to match, download your 'Available Active e-Tags' from your e-Tag Summary Report.
Matching Certificates to Imported e-Tags

• e-Tags can be matched to certificates directly on the 'Match Tags' page, or by using the 'Upload Tags' button on the 'Match Certificates' page and uploading a file

• Matching e-Tags to certificates on a monthly basis
  • Helps avoid long-standing criteria issues
  • Alleviates matching certificate batches to large numbers of e-Tags
Matching Certificates to Imported e-Tags

• In the 'Account Holder Reports' Module select the 'e-Tag Summary Report'
  – Use the 'From Month' and 'To Month' dropdown lists to select the date range to display and select the 'Go' button

• Download your 'Available Active e-Tags' Report to determine the imported e-Tags to match, inactivate, or retire
Matching Certificates to Imported e-Tags

1. On the 'Home' page, go to the 'Account Activity' module, select Active certificates as the source of the REC/e-Tag Match
   - Click the certificate quantity hyperlink

2. On the 'Certificates in Active Subaccount' screen, select the Generating Unit(s) and Generation Month(s) to match
   - If needed, change the certificate quantity(ies) (fixed amount only)
   - Select the 'REC/e-Tag Match' button
Matching Certificates to Imported e-Tags

Enter the details of the REC/e-Tag Match on the 'Match Certificates' screen by selecting:

- 'REC/e-Tag' radio button
- 'Match Tags' button
Matching Certificates to Imported e-Tags

4 In the 'Match Tags' pop-up window, use the 'From Month' and 'To Month' dropdown lists to select the date range to display and select the 'Go' button (Displays top 100 by e-Tag - select as many or few as needed)

5 In the same 'Match Tags' pop-up window
   - Check the e-Tag(s)
   - Change the certificate quantity(ies) (fixed amount only)
   - Select 'Matched with selected e-Tag' button
On the 'Match Certificates' screen, verify the correct batch(es) and amount(s) have been selected (Transfer Quantity, Generating Unit(s) and Generation Month(s))

- Select the 'Submit' button
File Upload to Match Certificates to Imported e-Tags
File Upload: Matching Certificates to Imported e-Tags

1. On the 'Home' page, go to the 'Account Activity' module, select Active certificates as the source of the REC/e-Tag Match
   - Click the certificate quantity hyperlink

2. On the 'Certificates in Active Subaccount' screen, select the Generating Unit(s) and Generation Month(s) to match, if needed change the certificate quantity(ies) (fixed amount only)
   - Select the 'REC/e-Tag Match' button
File Upload: Matching Certificates to Imported e-Tags

3. Select the 'Download Available Tags File' button:
   - Save the .csv file to your computer
   - Select the 'Yes' button to keep file formatting
   - Make changes to the .csv file (remove lines not needed, add amount(s) to 'Matching Quantity'
   - Resave the .csv file, select the 'Yes' button to keep the file formatting
   - Close the .csv file, select the 'Don't Save' button

Match Certificates

| Certificate Serial Numbers | Quantity | Transfer Quantity | Generator Plant/Unit Name | Fuel Type | Vintage Month | Vintage Year | Arizona | British Columbia | California | Colorado | Montana | Nevada | New Mexico | Texas | Washington | Oregon | Utah | Greeve Energy Eligible | Ecotags Certified | Hydro Certification | SWIID Eligible | eTag Matched | eTag |
|---------------------------|----------|-------------------|---------------------------|-----------|---------------|--------------|---------|------------------|------------|----------|---------|-------|------------|-------|-------------|--------|-----|--------------------|------------------|-------------------|----------------|-----------|------------|------|
| M-F-WETS-08-05 to 150     | 500      | 0                 | Football Power Plant - BenFaw Unit | Wind      | 10            | 2007         | No      | No               | No         | No       | No       | No     | No         | No    | No          | No     | No | Not Declared       | No               | No                | No             | No         | No         | 0    |
On the 'Match Certificates' screen, select the 'Upload' button

Warning: leaving this page while certificate/Tag matching process is in process may result in matching not completing correctly.
On the 'Tags Upload Report' pop-up window:
- Select the 'Browse' button
  - Browse and select .csv file on your computer
  - Select the 'Upload' button
  - Select the 'OK' button
Back on the 'Match Certificates' screen, verify the correct batch(es) and amount(s) have been selected (Transfer Quantity, Generating Unit(s) and Generation Month(s))

- Select the 'Submit' button
Un-Matching Certificates from Imported e-Tags
Un-Matching Certificates: Imported e-Tags

• Once certificates have been matched to e-Tags they can **only** be un-matched by the Account Holder who matched them
• Only 'Active' Certificates can be un-matched from e-Tags
**Un-Matching Certificates: Imported e-Tags**

1. On the 'Home' page, go to the 'Account Activity' module, select Active certificates as the source of the REC/e-Tag Un-match
   - Click the certificate quantity hyperlink

2. On the 'Certificates in Active Subaccount' screen, select the certificate batch(es) to un-match
   - Select the 'REC/e-Tag Un-match' button
Un-Matching Certificates: Imported e-Tags

On the 'Un-match Certificates' screen, verify the correct batch(es) and amount(s) have been selected (Quantity, Generating Unit(s) and Generation Month(s)), and if needed make changes
• Select the 'Submit' button

| Certificate Serial Numbers | Quantity | Transfer Quantity | Generator Plant Unit Name | Fuel Type | Vintage Year | Vintage Month | Arizona | British Columbia | California | Colorado | Montana | Nevada | New Mexico | Texas | Washington | Oregon | Alberta | Utah | Green-e Energy Eligible | Ecologo Certified | Hydro Certification | SMUD Eligible | eTag Matches | eTag |
|---------------------------|----------|-------------------|---------------------------|-----------|--------------|--------------|---------|------------------|-----------|----------|---------|-------|------------|------|-------------|--------|---------|-----|----------------------|---------------|---------------------|-------------|-----------|-----|---------------------|
| WP-REETS-07-121 to 121   | 1        | 1                 | Football Power Plant - BreitFavrelInit1 | Wind      | 2007         | No           | No      | Not Declared    | No        | No       | No      | No    | No         | No   | No          | No     | No       | No  | Not Declared        | No             | No                   | No          | Yes       | Yes |

1 certificates to be unmatched

© RECleTag Untag Tag

Submit  Cancel

Warning: leaving this page while certificate/tag unmatching process is in process may result in unmatching not completing correctly.
Inactivating and Reactivating Imported e-Tags
Inactivating & Reactivating Imported e-Tags

• Only the WREGIS Account Holder who had the e-Tags imported into WREGIS can inactivate or reactivate e-Tags

• Inactivated e-Tags can be reactivated

• Inactivation of e-Tags provides the Account Holder with an uncluttered list of available e-Tags when matching to certificates

• Inactivate Available Active e-Tags only after matching all of your certificates for a month
Inactivating Imported e-Tags

- In the 'Account Holder Reports' Module, select the 'e-Tag Summary Report'
  - Use the 'From Month' and 'To Month' dropdown lists to select the date range to display and then select the 'Go' button
- Download your 'Available Active e-Tags' report to determine the imported e-Tags to inactivate
Inactivating Imported e-Tags

On the 'Available Active e-Tags' screen select:
- e-Tags batch(es) to inactivate
- 'Inactive e-Tags' button

<table>
<thead>
<tr>
<th>eTag ID</th>
<th>Start Date</th>
<th>Stop Date</th>
<th>Generator Name</th>
<th>Load Control Area</th>
<th>Total MWh on Tag</th>
<th>Used MWhs</th>
<th>MWhrs remaining</th>
<th>MWhrs Exporting Entity</th>
<th>Miscellaneous Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>BPMT_DGEGENPSE_GSO</td>
<td>01/01/2008 12:00:00</td>
<td>01/01/2009 00:00</td>
<td>BPAPower</td>
<td>SDG3_BP15 016</td>
<td>100</td>
<td>1</td>
<td>Y</td>
<td>Y</td>
<td>RPS_ID/1234567890123</td>
</tr>
<tr>
<td>PAGW_DGEGENPSE10_GSO</td>
<td>01/01/2008 12:00:00</td>
<td>01/01/2009 00:00</td>
<td>PAGW-CA-Default</td>
<td>SDG3_BP15 016</td>
<td>100</td>
<td>1</td>
<td>Y</td>
<td>Y</td>
<td>RPS_ID/1234567890123</td>
</tr>
</tbody>
</table>
Reactivating Imported e-Tags

In the 'Account Holder Reports' Module select the 'e-Tag Summary Report'
Reactivating Imported e-Tags

- On the 'Inactive e-Tags' screen:
  - Select the 'Inactive e-Tags' tab
  - Use the 'From Month' and 'To Month' dropdown lists to select the date range to display and then select the 'Go' button
  - Select the e-Tags batch(es) to reactivate
  - Select the 'Activate e-Tags' button
Retiring Certificates with Matched e-Tags
Retiring Certificates with Matched e-Tags

- Retirements are **FINAL**
  - Check with your State/Provincial/Voluntary Program Administrator for specific RPS requirements and retirement instructions
Retiring Certificates with Matched e-Tags

1. On the 'Home' page, go to the 'Account Activity' module, select Active certificates as the source of the retirement
   - Click the certificate quantity hyperlink

2. On the 'Certificates in Subaccount' screen, find certificates with matched e-Tags by using the column filter
On the same 'Certificates in Subaccount' screen, select the Generating Unit(s) and Generation Month(s) to retire:

- If needed, change the certificate quantity(ies) (fixed amount only)
- Select the 'Batch Transfer' button
Enter the retirement details 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 Resource – e-Tag Required
- Select the 'Submit' button (user will be asked to confirm action)

Retirements are FINAL – check with your State/Provincial/Voluntary Program Administrator for specific RPS requirements and retirement instructions
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)