

## Changes to Periodic Data Submittals and Self-Certifications

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### Background

NERC has changed how users are assigned work for Periodic Data Submittals (PDS) and Self-Certifications (Self-Cert). Before, NERC automatically assigned the PDS and Self-Cert assessments to anyone that had permission to respond. NERC has since changed this approach to make the process more efficient.

### Changes

Now, when a Registered Entity is sent a Self-Certification or a PDS, it must ASSIGN specific people to complete the related assessment(s). Anyone who has permission to edit the Self-Cert can assign the assessments, but only users with the “Submit” permission can send the Self-Cert to the Region for processing. [Click here](#) for the updated Self-Cert training.

Note: The user must have been granted the Align Registered Entity Editor or Submitter role before WECC can send the PDS and Self-Cert. For more details about Align permissions, please see the [Align Registered Entity Training Questions and Answers](#).

### ***Assign a person to complete an assessment:***

1. Note that each Requirement has instructions to “Click to assign.” Click that link to prepare a default assignment.

**Questions**

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**Instructions** To create a new Assignment click **Click to Assign** below. Once Assignment is created click **Edit and Finalize Assignment** to submit Assessment. Open the questions below and answer each question. Need more time? Scroll down to **Request an Extension**. Have evidence to upload? Scroll down to the **Evidence** section.

**SELF-CERT ASSIGNMENTS**

SUBJECT	REVISION	STATUS
PRC-018-1 R1 <span style="border: 1px solid red; padding: 2px;">Click to Assign</span>	Not Assigned	Not Assigned

2. Next, you will need to finalize the default assignment. Click “Assignment Finalization Incomplete—Click here to Finalize” to move to the next step.

Questions		
<p><b>Instructions</b> To create a new Assignment click <b>Click to Assign</b> below. Once Assignment is created click <b>Edit and Finalize Assignment</b> to submit Assessment. Open the questions below and answer each question. Need more time? Scroll down to <b>Request an Extension</b>. Have evidence to upload? Scroll down to the <b>Evidence</b> section.</p>		
SELF-CERT ASSIGNMENTS		
SUBJECT	REVISION	STATUS
PRC-018-1 R1.	Not Assigned	Pending Assignment
<div style="border: 1px solid red; padding: 2px;">Assignment Finalization Incomplete - Click here to Finalize</div>		

- If you want to accept the default assignment (the default should be you), set the **Action** to "Assign," then click "Update." If you do not want the default assignee, you may assign the assessment to someone else, and if there are multiple Requirements, you may assign them to the same person at the same time. Click the **link** icon to change the Assignee and the Requirements. After selecting a new assignee, the box may show up blank instead of populating the assignee name. To verify that the correct name was selected, set the Action to "None" and click "Update." The name will populate when you finalize again.

When you are ready to finalize, set the **Action** to "Assign" and click "Update."

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Assignment

**Instructions** Assignment must have only **One** Person assigned. You must have at least **One** Requirement populated. To submit the Assessment, select **Assign** in the **Action** field and click the **Save** button.

**Persons**

ASSIGNEE

Andy Rodriguez

**Self-Cert Scope**

REQUIREMENT

PRC-018-1 R1.

**Action**

Action Assign

Update
Close

After the assessment is generated, the assignee can complete the assessment just as they could before the change.

- If you need to assign the assessment to someone else, you can "Assign Again."

This will create another default assignment that you may then modify and finalize (as in Steps 1 through 3).

**Questions**

**Instructions** To create a new Assignment click **Click to Assign** below.  
Once Assignment is created click **Edit and Finalize Assignment** to submit Assessment.  
Open the questions below and answer each question.  
Need more time? Scroll down to **Request an Extension**.  
Have evidence to upload? Scroll down to the **Evidence** section.

**SELF-CERT ASSIGNMENTS**

SUBJECT	REVISION	STATUS
PRC-018-1 R   <b>Assign Again</b> <small>Assigned to you (Andy Rodriguez) - Click here to Answer</small>	Initial Response	NEW <div style="width: 100px; height: 10px; background-color: #ccc;"></div>

**This will NOT cancel the original assessment.** The system now allows each assessment to be responded to by a different person. The entity only needs to respond to each requirement once. Incomplete assessments will be ignored.

