

WREGIS Operations, Software, and Transition Updates

Andrea Coon

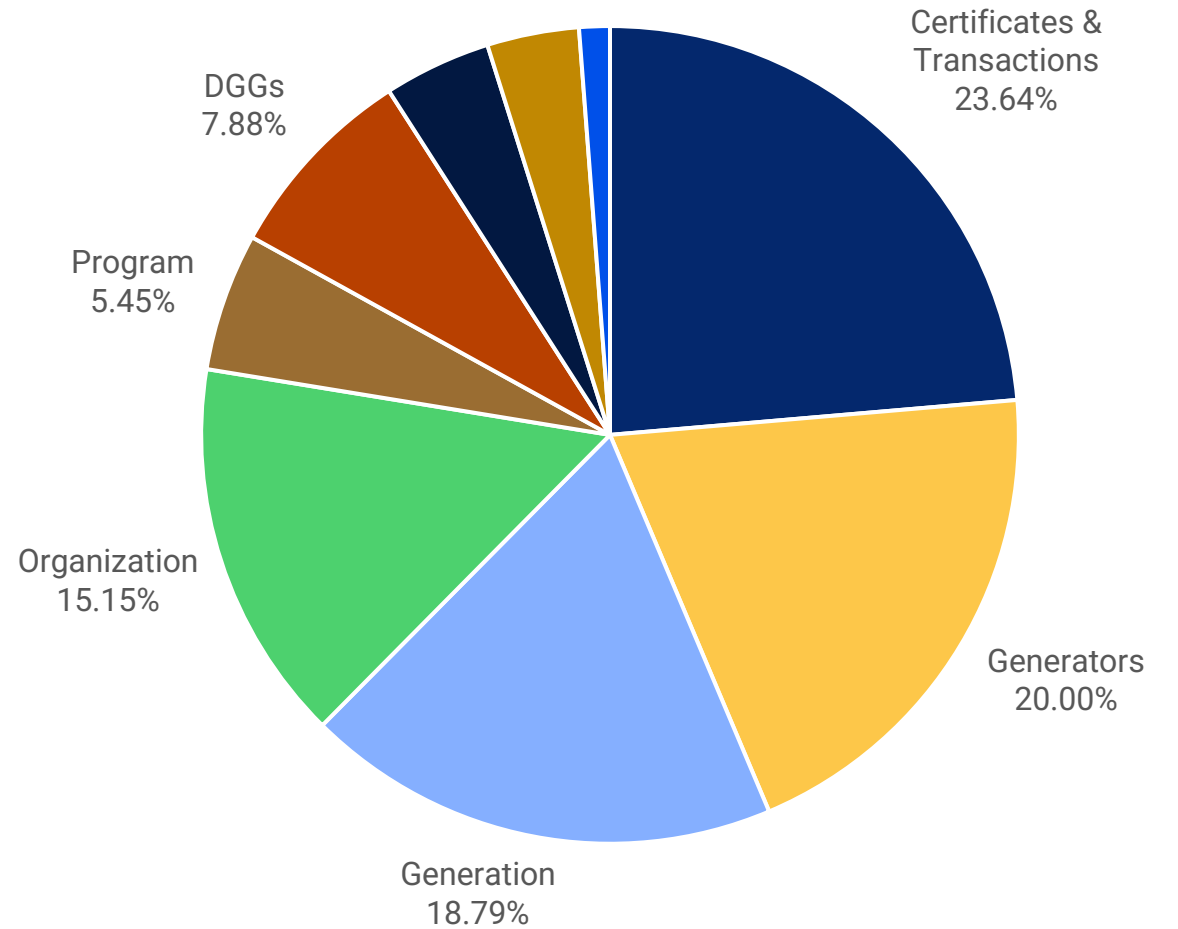
Director, WREGIS

Jillian Lessner

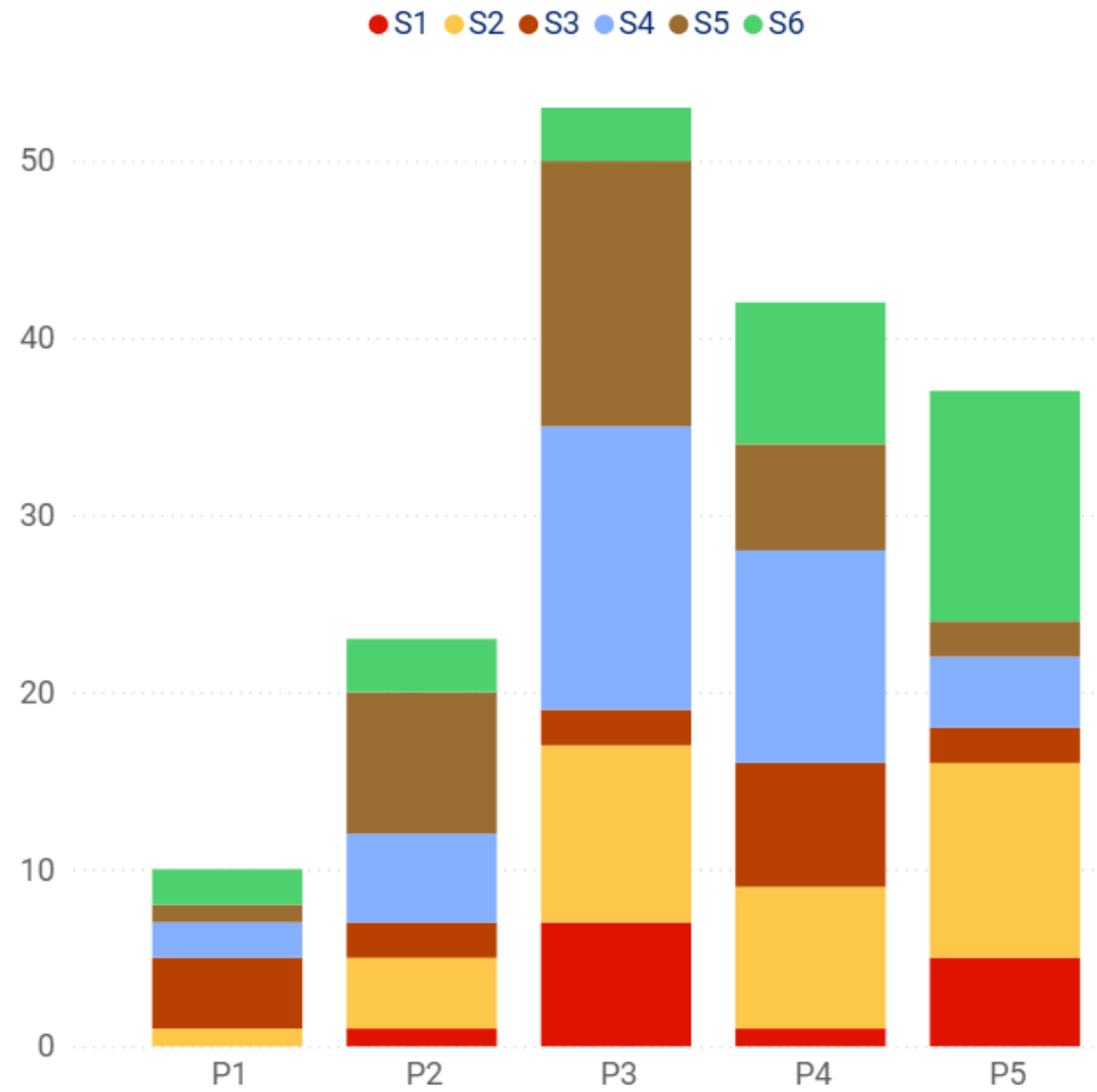
Chief Financial and Administrative Officer

Active Issues by Functional Category

Category	Count
Generation	31
Certificates & Transactions	39
Generators	33
Organization	25
Program	9
DGGs	13
e-Tags	7
Accounts	6
Reports	2



Tickets by Priority and Severity <Public>



Priority

The label assigned to an issue that indicates its development priority based on various factors and system impact.

Range

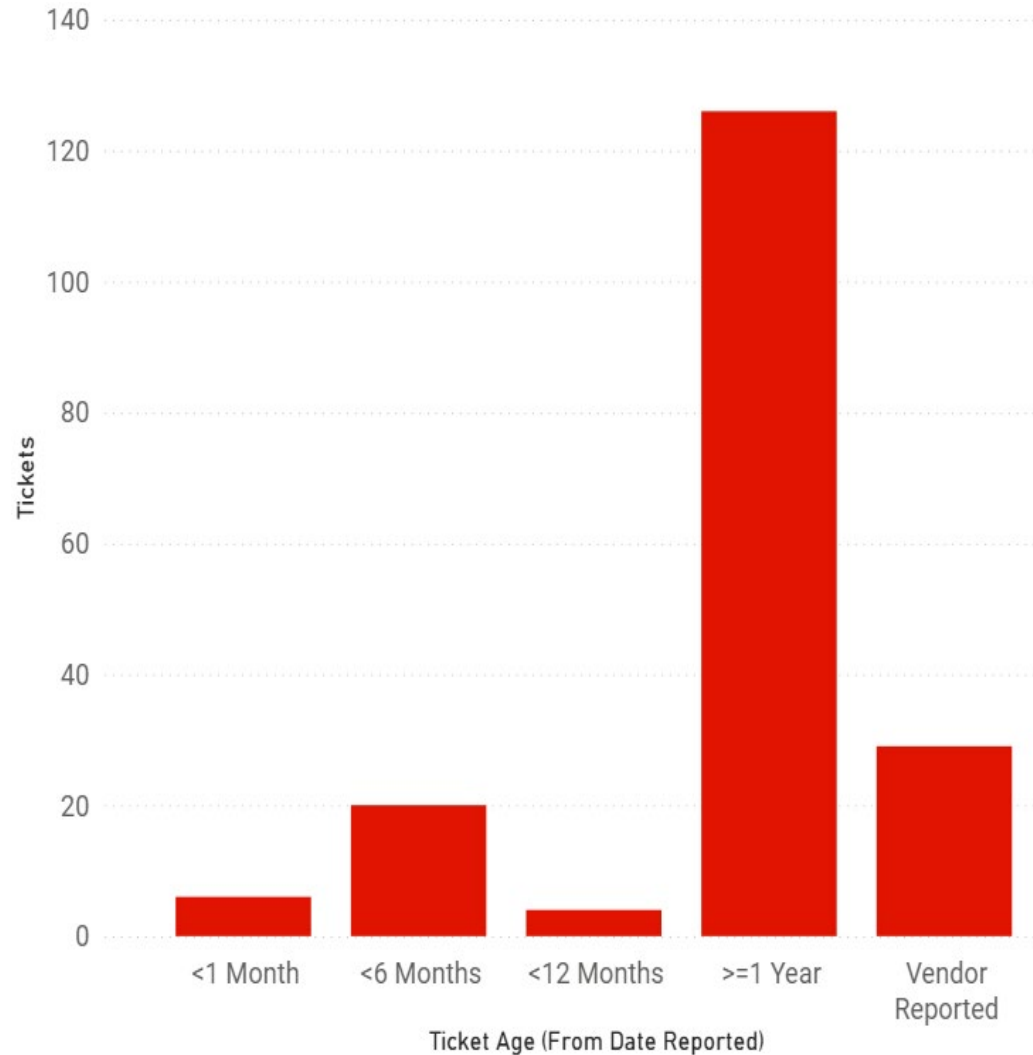
- P1: Breaches WREGIS’s primary responsibilities or blocks a pending software release
- P5: Minor issues, such as typos or misaligned text

Severity

- S1: All generators or customers
- S2: > 500 customers or > 5,000 generators
- S3: > 50 customers or > 1,000 generators
- S4: > 10 customers or > 100 generators
- S5: > 1 customer or > 10 generators
- S6: 1 customer or < 10 generators

Ticket Aging

<Public>



Active Issue Updates Since Last SAC	
Starting Outstanding Ticket Count	162
Tickets Cleared	2
New Issues Reported	5
Untracked Tickets Added**	0
New Outstanding Ticket Count	165

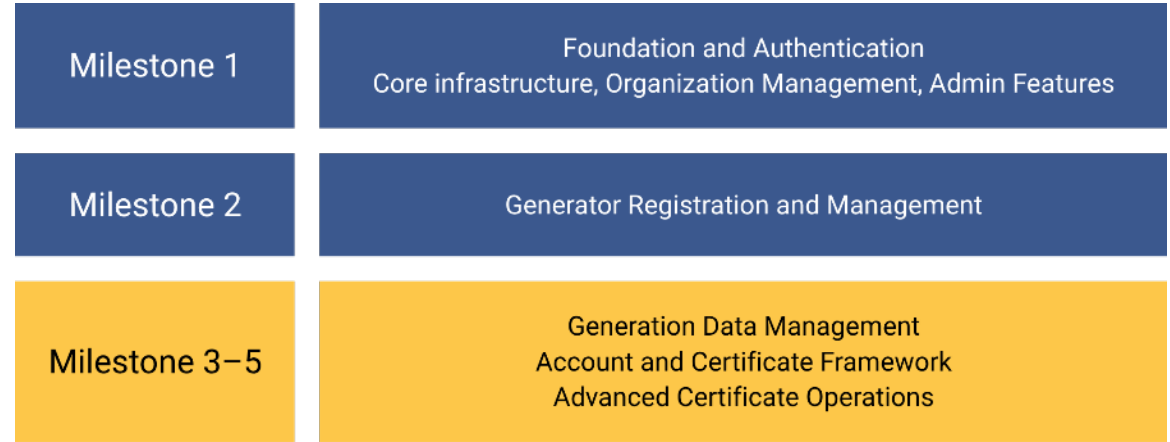
WREGIS Platform: Phase 1 Development Timeline



Software Development: Phase 1 ^{<Public>}

- **Q1 2026**

- ✓ Milestone 1 – Established a secure platform foundation with user management features
- Milestone 2 – Developed the core generator registration system



- **Q2 2026**

- Milestone 3 – Initiating development of the core generation data features
- Milestone 4 – Beginning work on the core Account and Certificate features

Milestone 1: Foundation and Authentication (Complete)

- **User Management and Security**

Milestone 1

Foundation and Authentication
Core infrastructure, Organization Management, Admin Features

- ✓ Password reset functionality
- ✓ Multi-factor authentication for enhanced security
- ✓ Add new users within an organization
- ✓ Update user privileges and profiles

- **Organization Registration**

- ✓ Register new customers and QREs
- ✓ Update organization contact and billing details

Milestone 2: Generator Registration and Management

- **Generator Management Features**

Milestone 2

Generator Registration and Management

- Register generators
- Update information for approved generators
- Upload and manage generator documentation
- Create and maintain Shared Meter Groups (previously "Aggregated Meter Groups")
- Assign a QRE for generation data reporting
- Track certificate remainder history by fuel type
- Add multiple fuel types to generators

Milestone 3: Generation Data Management

- Data reporting through UI and file upload
- Meter and fuel type allocations
- Generation activity logging
- Feasibility calculations for data validation
- Adjustments to generation data
- View previously entered allocations

Milestone 3–5

Generation Data Management
Account and Certificate Framework
Advanced Certificate Operations

Milestone 4: Account and Certificate Framework

- **Accounts**

- Create Active, Retirement, and Reserve accounts
- Account reporting

Milestone 3–5

Generation Data Management
Account and Certificate Framework
Advanced Certificate Operations

- **Certificates**

- Transferring certificates between accounts
- Retiring certificates
- Reserving certificates
- Recurring transfers
- Mass certificate transfers (via upload file)

Upcoming Phase 1 Milestones: Later in 2026

- **Q3 2026 – Milestones 5–8**

- Complete remaining Phase 1 platform functionality
- Development prioritization for Milestones 5–8 will be finalized in the coming months, focusing on items of higher complexity
- External user testing planned for Q3, with Atomic Object guiding representative user participation, group selection, and size
- Objective: Align user testing with meaningful functionality while ensuring time to incorporate feedback before launch

Milestone 3–5	Generation Data Management Account and Certificate Framework Advanced Certificate Operations
Milestone 6–8	Program Management and E-Tags Reporting and Analytics API and Integrations
Milestone 9	Quality Assurance and User Acceptance Testing
Milestone 10	Go Live and Support

- **Q4 2026 – Milestones 9–10**

- User Acceptance Testing (UAT): Validate the production-ready environment
- Launch new platform and stabilization

WREGIS Platform: Phase 1 Development Timeline



Software Launch Forum Members

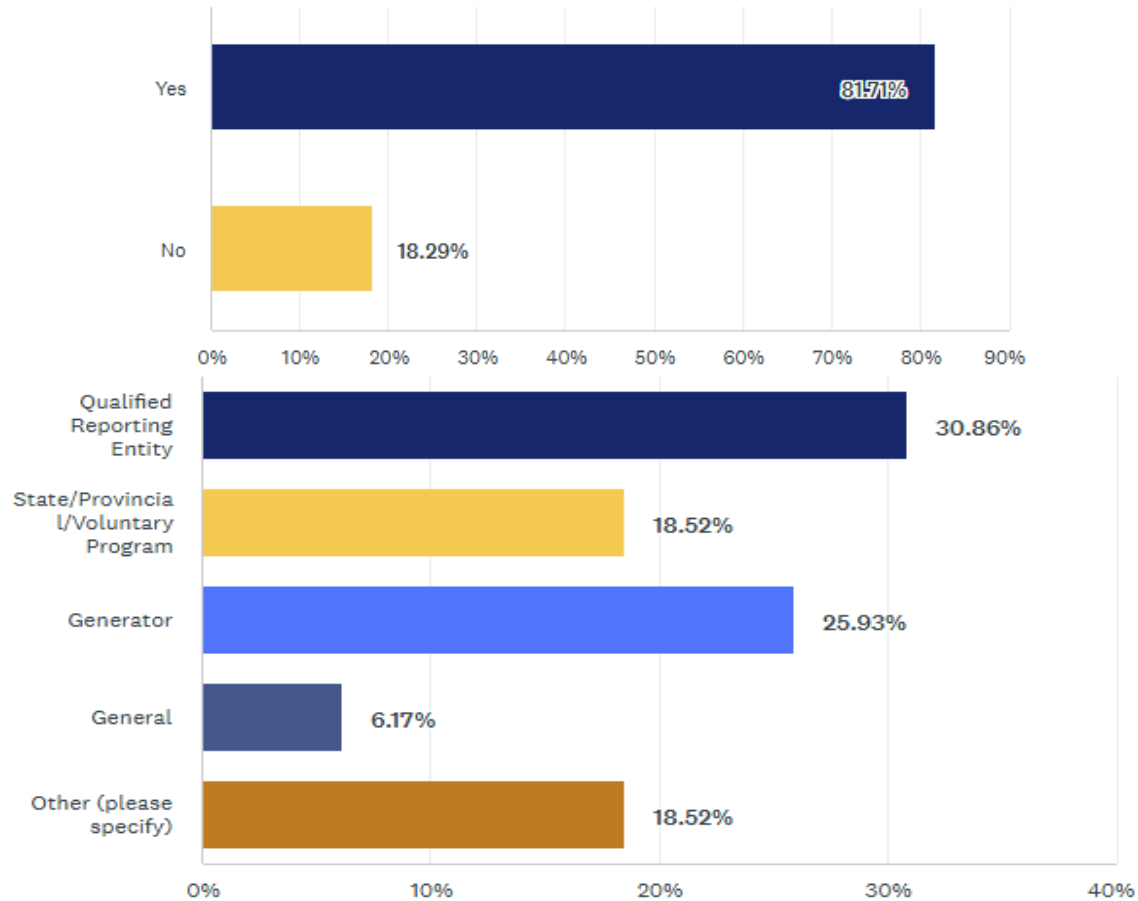
- **Clarissa Allen** – Bonneville Power Association
- **Simon Chang** – Southern California Edison
- **Nathan Gallegos** – Los Angeles Department of Water and Power
- **Matthew Kraai** – Tesla
- **Sean Inaba** – California Energy Commission
- **Chris Leyerle** – Puget Sound Energy
- **Austin Scharff** – Washington Department of Commerce
- **Trey Whiting** – Salt River Project

WREGIS Survey Results

<Public>

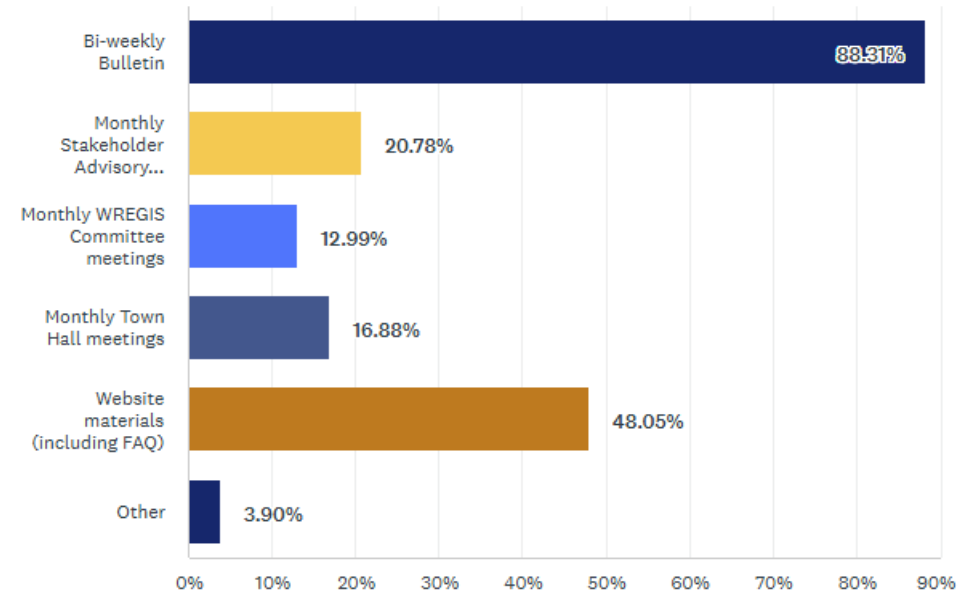
Would you support moving the target release date to February 2027?

Answered: 82 Skipped: 1



Which methods of information sharing have been most effective for you regarding WREGIS updates? Please select all that apply.

Answered: 77 Skipped: 6



Year-to-Date Results as of March

Main Variance Drivers

- Certificate activity: higher than budget
- Indirect allocation: lower than budget due to position vacancies
- Software development fees: unbudgeted

	Actual 2026	Budget 2026	Variance (over) /under
Funding			
ERO Funding	-	-	-
Other Funding	924,391	815,000	109,391
Total Funding	924,391	815,000	109,391
Expenses			
Personnel Expenses	314,447	361,601	47,154
Meeting & Travel Expenses	9,007	6,975	(2,032)
Operating Expenses	384,968	363,593	(21,375)
Indirect Allocation	262,011	359,335	97,324
Total Expenses	970,433	1,091,504	121,071
Fixed Assets	518,600	-	518,600
Total Expenditures	1,489,033	1,091,504	397,529
Funding Less Expenditures	(564,642)	(276,504)	(288,137)

Year-end Forecast as of March

Main Variance Drivers

- Certificate activity: higher than budget
- Consulting for software project management: unbudgeted
- Indirect allocation: lower than budget due to position vacancies
- Software development fees: unbudgeted

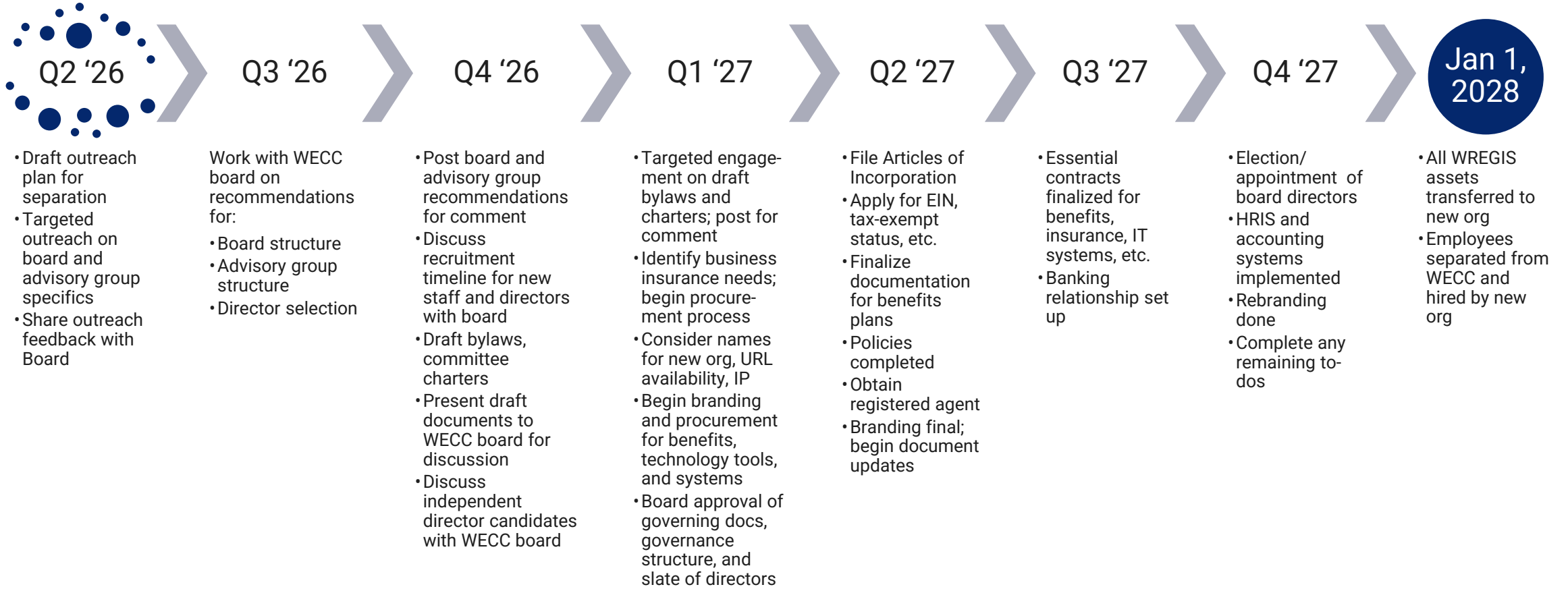
	Forecast 2026	Budget 2026	Variance (over) /under
Funding			
ERO Funding	-	-	-
Other Funding	3,910,891	3,567,500	343,391
Total Funding	3,910,891	3,567,500	343,391
Expenses			
Personnel Expenses	1,700,934	1,788,184	87,249
Meeting & Travel Expenses	73,707	51,480	(22,227)
Operating Expenses	1,581,318	1,347,972	(233,346)
Indirect Allocation	1,237,011	1,437,341	200,330
Total Expenses	4,592,970	4,624,977	32,006
Fixed Assets	2,155,240	12,884	(2,142,356)
Total Expenditures	6,748,210	4,637,861	(2,110,350)
Funding Less Expenditures	(2,837,319)	(1,070,361)	(1,766,959)

Working Capital Reserves

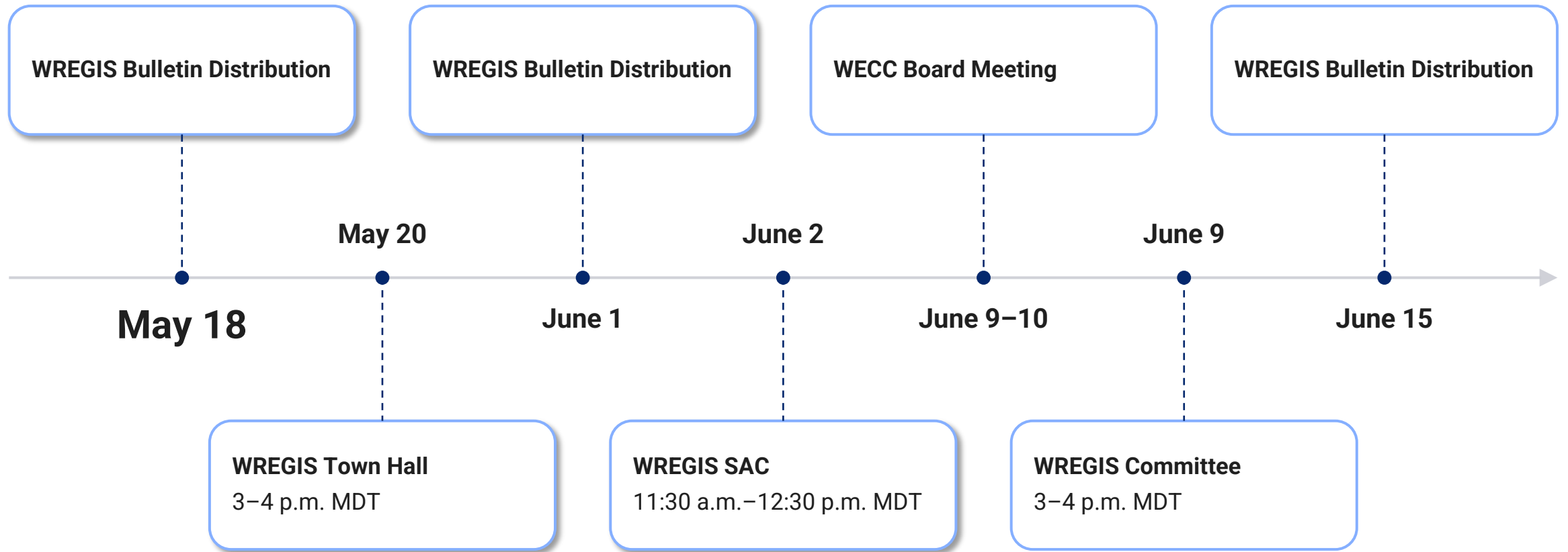
Working Capital Reserve Analysis NON-STATUTORY

	Total
Beginning Reserves, January 1, 2026	\$ 6,846,334
Plus: 2026 Funding	3,910,891
Less: 2026 Projected expenses & capital expenditures	(6,748,210)
Less: 2026 Transfer of Peak Holdback Reserves to Statutory	(292,000)
Projected Reserves (Deficit), December 31, 2026	<u><u>\$ 3,717,015</u></u>
Plus: 2027 Funding	4,332,740
Less: 2027 Projected expenses & capital expenditures	(6,747,844)
Projected Reserves, December 31, 2027	<u><u>\$ 1,301,911</u></u>

Draft Timeline for Separation and Stakeholder Engagement



Upcoming Events





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