# WECC

## WREGIS Distributed Generation Group Registration Guide

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## Introduction

Distributed Generation (DG) Group registrations allow organizations to register multiple customer-sited, distributed-generation generating units under a single system registration.

These types of registrations are intended for customers with large numbers of small customer-sited, distributed-generation generating units with similar attributes to help facilitate registration and generation data reporting. DG Groups are not intended as an alternative to the standard generating unit registration process or to reduce the amount of required documentation. DG Groups are subject to the same standards as all other generating unit registrations outlined in Section 5 of the WREGIS Operating Rules.

This guide will walk WREGIS customers through the requirements for participating in DG Group registrations, registering and managing DG Group projects, and answer the most common questions. If you have questions not addressed in this document, reach out to wregishelp@wecc.org for additional assistance.

## Qualifications

WREGIS's requirements for DG Group registrations mirror the requirements for standard generating unit registrations. If a unit is not capable of being registered as a standard generating unit registration in WREGIS for any reason, it is not eligible to be registered in a DG Group.

### Documentation

Required documentation must be readily available and accessible by the customer for all units registered in DG Groups. The required documentation is determined during the pre-approval process and typically includes:

- Utility Interconnection Agreement;
- Customer Contract;
- Rights to Environmental Attributes (rights to register unit in WREGIS);
- Notice of Commenced Operation Date (Permission to Operate);
- One-line diagram;
- Proof of Revenue-Quality Meter ID; and
- WREGIS Acknowledgement of Station Service.

### Metering and Generation Data Reporting

All units within DG Group registrations must meet the metering requirements outlined in Section 9.1 of the WREGIS Operating Rules. Each unit must have its own meter. Unit meter reads must be tracked and made available to WREGIS upon request.

For DG Groups less than or equal to 360 kW in size, the customer may choose to self-report generation data or use a Qualified Reporting Entity (QRE). DG Groups larger than 360 kW must have a QRE report generation data. All reported generation data, regardless of the source, is subject to the requirements outlined in Section 9 of the WREGIS Operating Rules.

Generation data for DG Groups should include full calendar months whenever possible. The sum of the generation data for the individual units must be uploaded into WREGIS as a single entry for the DG Group. Generation data for all units must use the same reporting period (first and last day), or otherwise report data using a process approved by the WREGIS Administrator during the pre-approval process.

## WREGIS Right of Refusal and Termination

Customers must have the resources necessary, including staff availability, internal resources, access to data and documentation, etc., for a DG Group project to be considered viable. WREGIS reserves the right to refuse pre-approval or inactivate existing DG Group registrations if the WREGIS Administrator deems a project to be ineffective. For more information, see Appendix D of the WREGIS Operating Rules.

## Pre-Approval Process

Customers must be pre-approved by the WREGIS Administrator to participate in DG Group functionality. The purpose of pre-approval is to confirm the customer meets the qualifications outlined above, as well as to establish methods for creating and managing DG Groups in WREGIS.

If you are seeking DG Group pre-approval, carefully read through the Qualifications section above to see if you may qualify, then contact WREGIS directly for further information.

### New Customer Pre-Approval

New customer pre-approval for DG Group functionality consists of these steps:

1. Customer submits the application and data worksheet.
2. WREGIS Administrator reviews the submission. The WREGIS Administrator may have additional questions at this time.
3. WREGIS Administrator requests sample documentation for randomly chosen units. Though WREGIS does not request documentation for all units being registered during the pre-approval process, the customer is expected to have access to required documents for all units.
4. Customer submits complete document packages for requested units, along with any other required supporting materials.

5. WREGIS Administrator reviews documentation and decides whether to pre-approve or reject the application. The WREGIS Administrator may require pilot registrations before granting full pre-approval.

DG Group pre-approval generally takes a few months to complete. The pre-approval process may be terminated if the customer does not manage the process in a timely or consistent manner.

## Project Pre-Approval

DG Group approval is granted per project and interconnecting utility for the units within that project. If a customer would like to register DG Groups that contain units across multiple interconnecting utilities, pre-approval is required for each utility, as the available data and documentation may vary. Projects that differ in areas such as contract, project type, etc. will also require additional pre-approval.

Pre-approval for a new project follows the same steps as new customer pre-approval, though WREGIS may waive certain requirements based on what the customer previously provided.

# Registration Requirements

DG Group registrations contain the static information pertaining to the overall group and details of the individual units being registered within the group.

Nameplate capacities of the individual units must be the as-built system size (AC rating) of the units, not the inverter ratings. If a Customer is unable to provide as-built system sizes, an alternate nameplate method must be pre-approved by the WREGIS Administrator.

## Grouping Requirements

- Unless approved in writing by the WREGIS Administrator, new DG Group registrations cannot exceed the group limit of 250 kW, or 0.250 MW (AC). Expansions to units in an existing SSAG cannot exceed the group limit of 360 kW, or 0.360 MW (AC).
- Individual units registered in a SSAG cannot exceed 50 kW, or 0.050 MW (AC), unless approved by the WREGIS Administrator.
- Units should be registered in separate groups based on—
  - Fuel type;
  - Interconnecting utility;
  - Residential vs. non-residential;
  - Generation data reporting frequency and normalization methods; and
  - Other grouping requirements discussed during the pre-approval process.

## Data Formatting Requirements

The effectiveness of DG Group registrations is dependent on the accuracy of the static data within those registrations. For that reason, it is imperative that the Customer follow data formatting requirements for consistency across the DG Group registrations:

- No missing static data other than optional information;
- No abbreviations (N/S/E/W, Dr., Ste., etc.) unless approved by WREGIS Administration;
- No commas or comma characters (semi-colons, apostrophes, etc.); and
- No unnecessary (extra) text spaces before, after or between text.

Additional information on static unit fields can be found in Appendix A.

## File Format Requirements

Customers will have the ability to upload .CSV files containing the static unit information for DG Groups in the next few months. Details will be released at that time.

# WREGIS System Navigation

## Viewing DG Group Information

DG Groups are located within their own section in WREGIS and will only be visible after your organization has been pre-approved to participate.

In the DG Groups section of your WREGIS account, you can:

- View all DG Group registrations under the **Groups** tab;
- View all units within the DG Group registrations under the **Units** tab;
- Sort, filter, and download views in .CSV or .PDF format;
- Add or edit DG Group registrations; and
- Add, edit, or inactivate units within the groups.
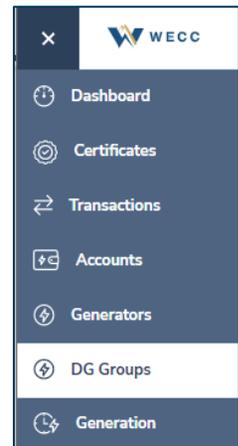
## New DG Group Registration

To add a new DG Group registration:

1. Navigate to the DG Groups section and click **Add New DG Group** on the Groups tab.
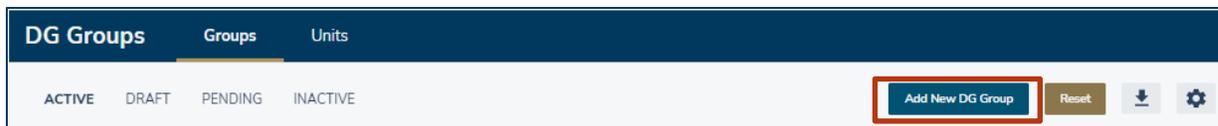
2. Complete information on the **General, Owner, Engineering,** and **Fuel(s)** tabs. You can add units to the DG Group at this time or add them after the group has been approved. See Adding Units to a DG Group Registration for more information on how to add units.

3. Click **Save Draft** to save the form. You can save an incomplete form if needed.



**NOTE:** You can access your draft DG Group later by navigating to the **Draft** subtab on the **Groups** tab and selecting the group. Click **Edit** to continue filling out the registration form.

4. Click **Submit Generator** when you are ready to submit the group for WREGIS Administrator review. If you attempt to submit an incomplete form, the system will show you which fields require completion. Units do not need to be included to submit a DG Group for review.



5. The WREGIS Administrator will notify you once the DG Group has been approved, or if further action is needed.

## Adding Units to a DG Group Registration

### Adding Units Using the UI

1. Open the DG Group registration you wish to add a unit(s) to by creating a new DG Group or editing an existing one in Active or Draft status.

2. Navigate to the **Units** tab and click **Add**.

3. Enter the unit details on the **Add Unit** form and click **Save**. Be sure to the follow the [Data Formatting Requirements](#) as outlined above.



4. Repeat as needed until all units have been added to the DG Group registration.

5. Click **Save Changes** or **Save Draft** on the DG Group, depending on whether you are working with an existing group or one still in Draft status.

6. Added units are placed into Pending status and will not be included in the DG Group nameplate calculation until approved by the WREGIS Administrator. The WREGIS Administrator will notify you once the unit(s) has been approved, or if further action is needed.

### Adding Units Using a File

Customers will have the ability to upload .CSV files containing the static unit information for DG Groups in the next few months. Details will be released at that time.

## Updating DG Group Registrations

DG Group registrations should be updated when there are changes to the group level information (such as owner and QRE information) or if units need to be added, edited, or inactivated within a DG Group.

### Updating Group Level Information

1. Navigate to the DG Groups section and select the group name that needs to be updated on the **Groups** tab.

2. Click **Edit**.

3. Update the group level information as needed on the various tabs. You can also add, edit, or inactivate units at this time. Click **Save Changes** when you are finished making updates.



4. If any of the updated information requires WREGIS Administrator approval, the DG Group will be placed into Pending status. The WREGIS Administrator will notify you once the DG Group has been approved, or if further action is needed.

### *Updating Unit Information*

To add units to a DG Group, see Adding Units to a DG Group Registration in the above section. To edit or inactive a unit that is already in a DG Group:

1. Navigate to the DG Groups section and select the group name that needs to be updated on the Groups tab.

2. Click **Edit**.



3. On the **Units** tab, find the unit that you would like to update and click **Edit Unit**.
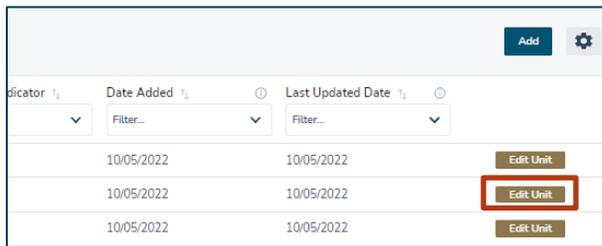


4. Make the necessary changes to the unit information on **Edit Unit** form. If inactivating the unit, check the **Inactive Unit?** box. Click **Save**.
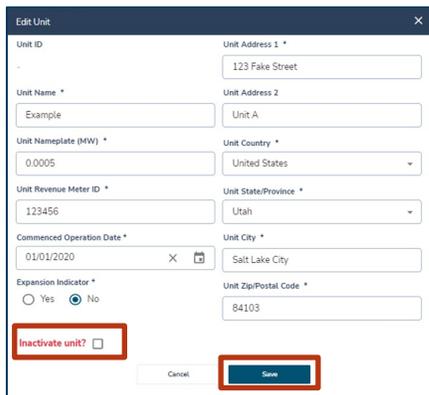
5. Repeat as needed until you have completed all necessary updates for units in the DG Group registration.

6. Click **Save Changes** on the DG Group when you are finished making updates.



7. Edited units are placed into Pending status and will not be included in the DG Group nameplate calculation until approved by the WREGIS Administrator. The WREGIS Administrator will notify you once the unit(s) has been approved, or if further action is needed. Inactivated units are immediately placed in Inactive status and removed from the nameplate calculation.

# DG Group Management and Maintenance

## Customer Responsibilities

DG Group information is expected to change over time, including contact information, meter updates, unit expansions, etc. As this information changes, the DG Group registrations in WREGIS must be updated by the Customer. The Customer should have internal processes in place regarding when these changes occur and what information needs to be updated in WREGIS.

Regular DG Group maintenance includes:
- Adding new units to existing groups;
- Creating new group registrations as group capacities are reached;
- Inactivating units that are no longer eligible for registration;
- Updating static unit and group information as changes occur; and
- Any updates required by the WREGIS Administrator.

## Annual Reviews

Organizations must complete an annual review for each DG Group. Instructions for completing the Annual Review can be found on the WREGIS website.

## Updates and Generation Data Reporting

Units in an approved DG Group are not eligible for generation data reporting or certificate creation when in Pending status. Before reporting generation data for a DG Group, make sure all units you are reporting for are in Active status.

## Auditing

WREGIS audits new and existing DG Groups for:

- Accuracy;
- Method;
- Duplication;
- Consistency; and
- Compliance with WREGIS standards.

An audit is automatically initiated and completed by the WREGIS Administrator during the registration process. WREGIS may also initiate a spot or for-cause audit at any time. DG Group participants are required to comply with audit requests in a timely manner. Audit requests may require documentation, data verification, written explanations, internal processes, updates to registrations, or other items as deemed necessary by the WREGIS Administrator.

Failure to comply with audit requests in a timely manner may result in DG Group inactivation or revocation of DG Group pre-approval.

## Appendix A—Static Unit Field Information

| Field Name | Field Type | Format Notes |
|---|---|---|
| Unit ID | Automated | Unique ID issued by WREGIS Software |
| Unit Name | Text | Unique, as determined during pre-approval |
| Unit Nameplate (MW) | Numeric | Must be in MW AC format, not inverter rating |
| Unit Revenue Meter ID | Text | As determined during pre-approval |
| Commenced Operation Date | Date | mm/dd/yyyy format |
| Expansion Indicator | Yes/No | Applicable if registered older units at premise |
| Unit Address 1 | Text | Postal address accuracy, no abbreviations or PO Box |
| Unit Address 2 | Text | For additional address info such as unit numbers |
| Unit Country | Dropdown | - |
| Unit State/Province | Dropdown | - |
| Unit City | Text | - |
| Unit Zip/Postal Code | Text | Five-digits only |