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## **WREGIS e-Tag Participation Guide**

August 2024

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## Introduction

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WREGIS customers have the option of importing e-Tags into their WREGIS organization to match with issued certificates. OATI, via the Western Interchange Tool (WIT), supplies e-Tag information to WREGIS. It is the Load-serving Entity (LSE) scheduler's responsibility to properly mark e-Tags, so they are included in the monthly upload file.

There are additional monthly fees associated with this service, outlined on the [WREGIS Fee Matrix](#). WREGIS recommends against signing up for this feature if it is not required to meet your regulatory or contractual obligations. If you are unsure whether e-Tags are required, consult your counterparty or program.

If you have any questions about using e-Tags, please contact us at [wregishelp@wecc.org](mailto:wregishelp@wecc.org).

## Signing Up for e-Tags in WREGIS

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WREGIS can only load e-Tags for customers on a forward-going basis, starting the month *after* they have met the requirements below and the WREGIS Administrator approves e-Tag use.

### Requirements:

1. Provide your organization's Purchasing-selling Entity (PSE) code(s) to WREGIS; and
2. Sign and return the [WREGIS e-Tag Indemnification Agreement](#).

Submit both the PSE code and the agreement to [wregisadmin@wecc.org](mailto:wregisadmin@wecc.org).

## Importation of e-Tags and Timing

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WREGIS receives an e-Tag upload file containing the previous month's e-Tag data from OATI by the 7th of every month. WREGIS processes this file within five business days. WREGIS will notify e-Tag users once WREGIS has processed the file. At that time, the e-Tags will be visible and available for use within the organization. WREGIS makes no corrections or changes to the data import file; WREGIS loads files exactly as they are received from OATI.

The WREGIS system will not load e-Tags if:

- The organization is not in *approved* status;
- The organization's profile does not list the PSE code;
- The organization's schedulers did not properly fill out the e-Tags; or
- Multiple entities enter a Token/Value (RPS\_ID) on the same e-Tag.

If the WREGIS system does not load e-Tag(s) for one of the above reasons, it cannot be imported later and will remain outside of the WREGIS system. If this has occurred, contact your program or counterparty to facilitate e-Tag matching using alternative methods.




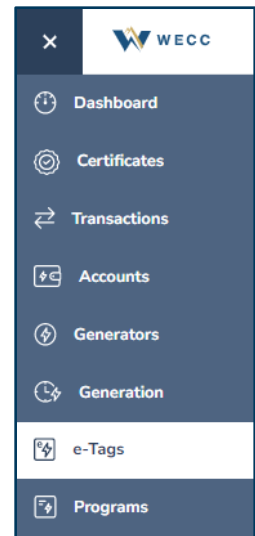
## Viewing Your e-Tags

The e-Tags section and functionality will become visible once WREGIS staff adds a PSE code to your organization profile.

In the e-Tag section you can view:

- Active e-Tags available for matching;
- e-Tags your organization has previously designated as *inactive* (users cannot currently inactivate e-Tags);
- e-Tags your organization has matched to certificates;
- e-Tags your organization has transferred to another WREGIS organization via certificate transfers; and
- The history of e-Tag matches and unmatches in the Event Log.

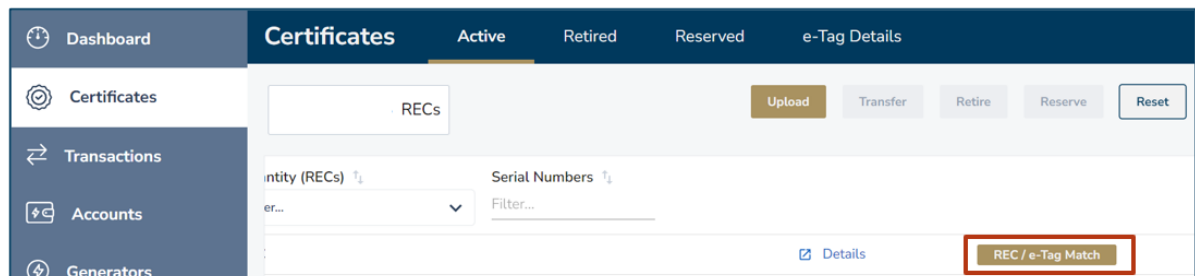
You can sort, filter, and download any table within the e-Tag sections in CSV or PDF format. To download a table, click the downward-pointing arrow in the top-right corner of the screen: . Tables with more than 100 lines of data will be sent by email.



## Matching e-Tags to Certificates via the UI

To match certificates to e-Tags using the user interface (UI):

1. Navigate to **Certificates** and click **REC/e-Tag Match** (located on the far-right side of the screen) for the batch of certificates you wish to match.



2. Verify the batch of certificates selected. If you are only matching part of the batch, change the number in the **Quantity (RECs)** field to reflect the desired number of certificates. Click **Next**.

**Match REC / e-Tags**

1 — 2 — 3 — 4 — 5  
 REC's quantities    Select e-Tags    Select Amount    Review    Success!

**Input the amount of REC's**

Asset Id	Serial Numbers	Fuel Type	Vintage	Generator Location	Quantity (REC's)	Max Available
					22	22 <a href="#">Details</a>

**Matching Overview**

Total REC's to be matched  
**22**

[Back](#) [Next](#)

- Use the filters at the top of the table to find the e-Tag(s) you wish to match to the batch of certificates. Select the desired e-Tag(s), and click **Next**.

**Match REC / e-Tags**

✓ — 2 — 3 — 4 — 5  
 REC's quantities    Select e-Tags    Select Amount    Review    Success!

Please select the active e-Tags that you would like to match.

1 row is selected.

e-Tag ID	Start Date	Stop Date	Remaining MWh on Tag	Total MWh on Tag	Miscellaneous Field
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Matching Overview**

Total REC's to be matched  
**22**

[Back](#) [Next](#)

- Adjust the number in the **Amount** column of the e-Tag(s) selected so the total equals the number of certificates you wish to match. If you are matching more than one e-Tag to a batch of certificates, you must distribute the total certificates between the e-Tags. Click **Next**.

**Match REC / e-Tags**

✓ — ✓ — 3 — 4 — 5  
 REC's quantities    Select e-Tags    Select Amount    Review    Success!

Enter the amount you would like to match to each e-Tag.

e-Tag ID	Amount available	Amount
P		22
<b>TOTAL</b>		<b>22 of 22</b>

**Matching Overview**

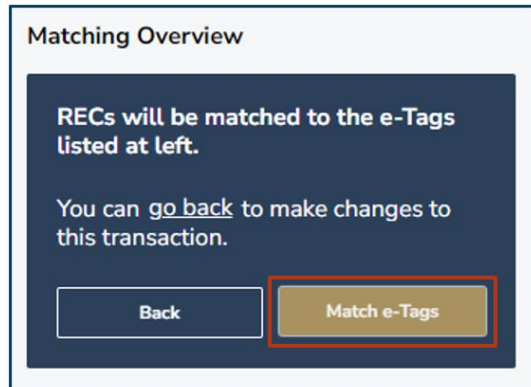
Total REC's to be matched  
**22**

[Back](#) [Next](#)

**NOTE:** The total of the e-Tags must match the total certificates before you can continue. Click **Back** to return to the **REC quantities** screen if you need to change the number of certificates selected within the batch.



- Review the details of the match transaction and click **Match e-Tags**, if correct. Use **Back** to edit if needed.

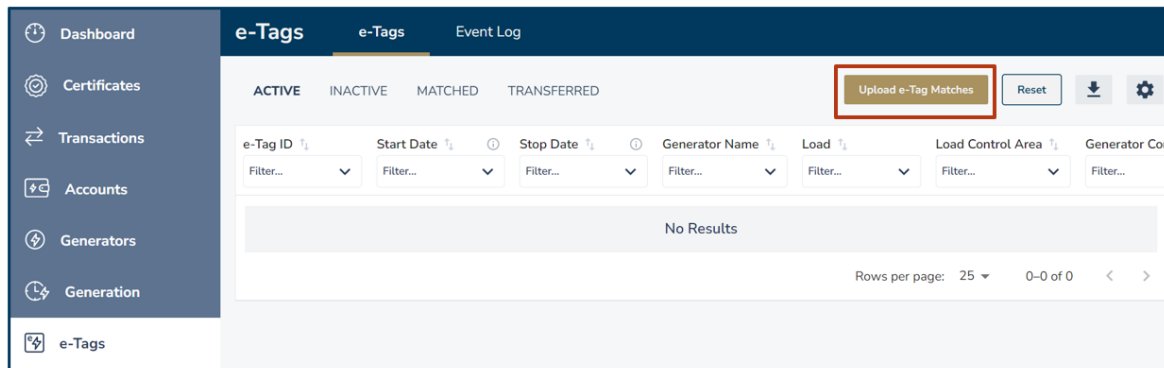


## Matching e-Tags to Certificates via File Upload

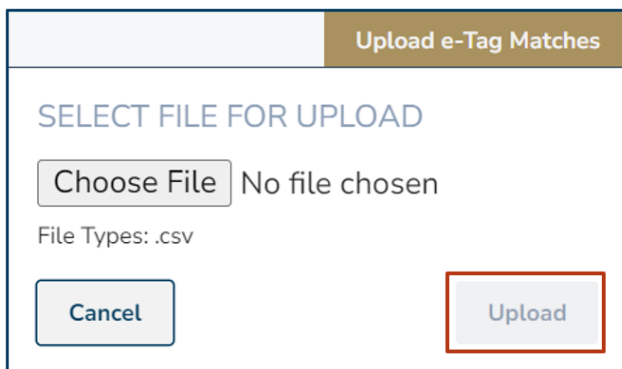
Customers may use a CSV file to efficiently match large numbers of certificates and e-Tags. You can find file format details for the e-Tag Match File in [Appendix A](#).

To match certificates to e-Tags using a file:

- Navigate to **e-Tags** and click **Upload e-Tag Matches** in the upper-right corner.



- Choose your file, then click **Upload**.



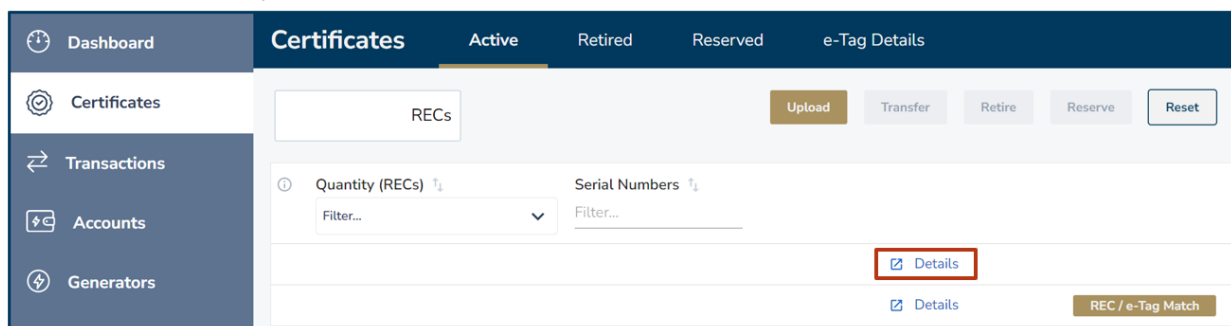
3. If the file is in the correct format, you will receive a green success message. WREGIS will send a confirmation email once processing is complete.

## Viewing e-Tags Matched to a Certificate Batch

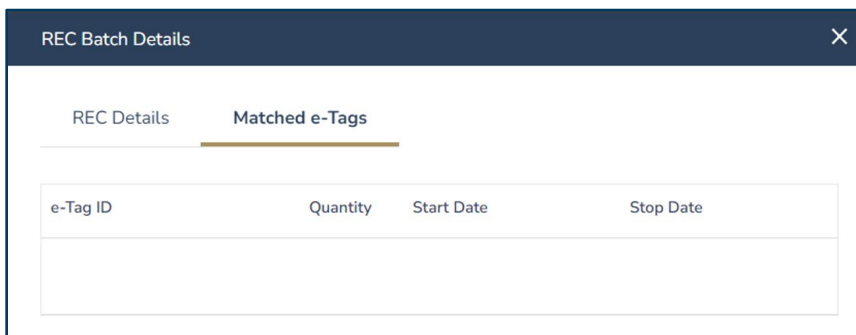
To view e-Tags matched to a single certificate batch, use the certificate Details link. The e-Tag Details table provides a way to view the same information for multiple certificate batches at one time.

### The Certificate Details Link:

1. Navigate to **Certificates** and click **Details** (located on the far-right side of the screen) for the batch of certificates you wish to view.

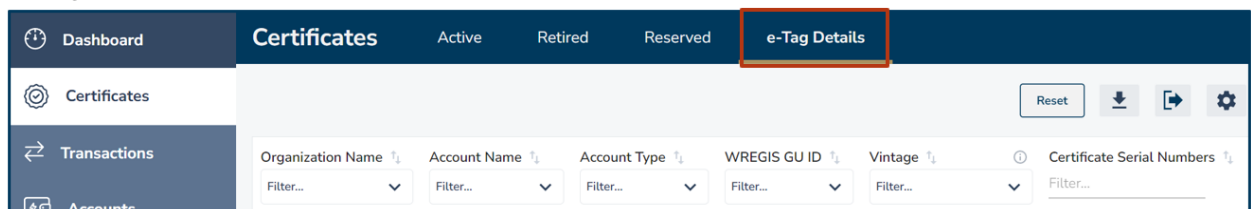



2. Navigate to the **Matched e-Tags** tab in the **REC Batch Details** pop-up screen. All e-Tags matched to the selected batch of certificates will be listed.



### The e-Tag Details Tab:

1. Navigate to **Certificates** and click on the **e-Tag Details** tab.



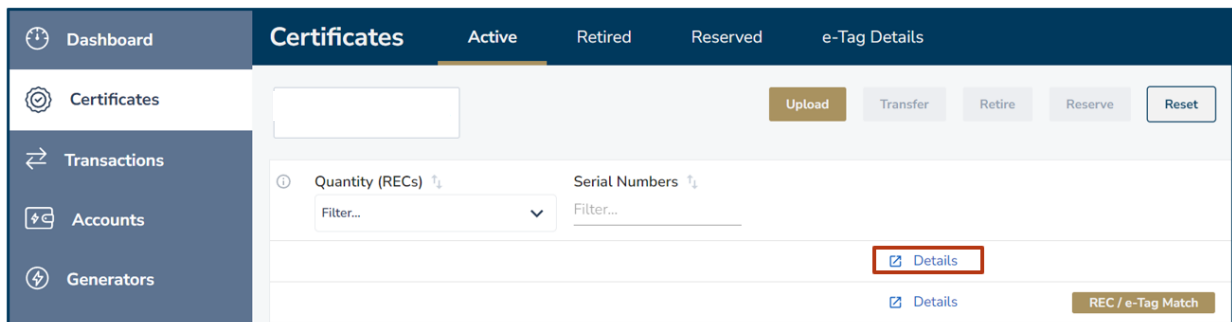
2. All matched e-Tags and the corresponding certificate batches within your organization Accounts are all listed in this table. Certificates that your organization has transferred to another customer will not be visible.
3. You can sort, filter, and download the **e-Tag Details** table in CSV or PDF format. To download, click the downward-pointing arrow in the top-right corner of the screen: . Tables with more than 100 lines of data may be sent by email.

## Unmatching e-Tags from Certificates

Only the organization that originally matched e-Tags to certificates can unmatch them. The certificates must be in one of your organization's Active Accounts to be eligible for unmatching. If you have transferred the certificates to another organization, your counterparty must transfer the certificates back before you can unmatch them. Certificates in Retirement or Reserve accounts cannot be unmatched from e-Tags.

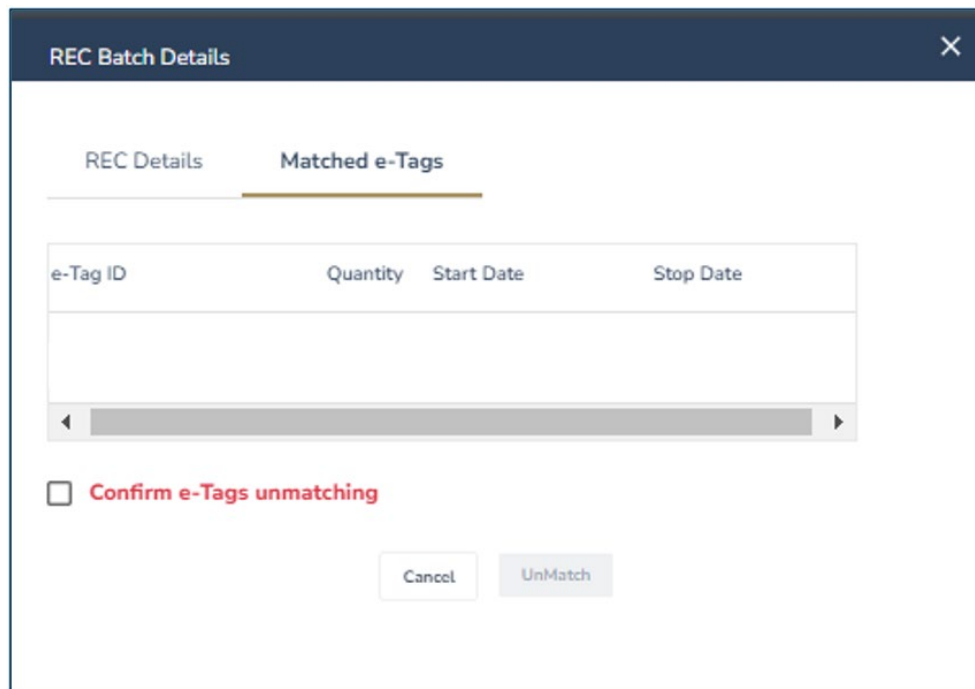
To unmatch e-Tags from certificates—

1. Navigate to **Certificates** and click **Details** (located on the far-right side of the screen) for the batch of certificates you wish to unmatch.



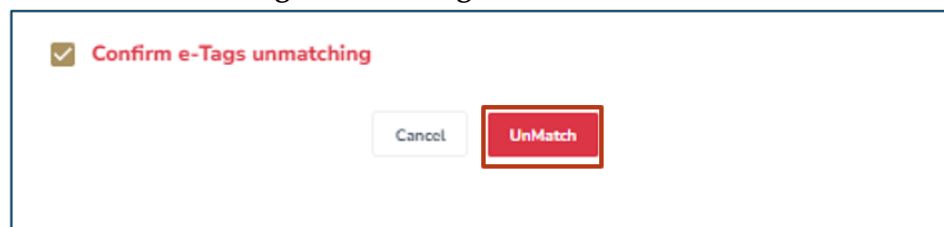


3. Navigate to the **Matched e-Tags** tab in the **REC Batch Details** pop-up screen.



The screenshot shows a pop-up window titled "REC Batch Details" with a close button (X) in the top right corner. Inside the window, there are two tabs: "REC Details" and "Matched e-Tags". The "Matched e-Tags" tab is selected and highlighted with a yellow underline. Below the tabs is a table with the following headers: "e-Tag ID", "Quantity", "Start Date", and "Stop Date". The table is currently empty. Below the table is a horizontal scrollbar. At the bottom of the window, there is a checkbox labeled "Confirm e-Tags unmatching" which is currently unchecked. Below the checkbox are two buttons: "Cancel" and "UnMatch".

4. Check **Confirm e-Tags unmatching**, then click **UnMatch**.



This screenshot shows the same "REC Batch Details" pop-up window, but with the "Confirm e-Tags unmatching" checkbox checked. The "UnMatch" button is now highlighted with a red border, indicating it is the next step to click.

**NOTE:** There is no way to partially unmatch e-Tags from a batch of certificates. If more than one e-Tag is matched to the batch, you must unmatch all of them, then re-match the correct e-Tags.

## Appendix A: e-Tag Matching File Specifications

The e-Tag matching file must be in CSV format encoded with UTF-8. The system has a line limit of 500 per file. A file header is required, with required fields listed below. Do not attempt to match the same serial number to the same e-Tag more than once in a file.

Field	Definition	Comments
serial_number_base	The base serial number, not including the quantity sequence start or end.	<b>Example:</b> 99999-AA-01-2022-123456 (RECs issued before November 2022 may have a different format.)
serial_number_start	The start of the quantity sequence of a REC serial number. Usually '1' but may be larger if the REC batch has previously been split by one or more transactions.	This is the value found in the section <i>before</i> the 'to' in a complete serial number. <b>Example:</b> 1 99999-AA-01-2022-123456- <u>1</u> to 100
serial_number_end	The end of the quantity sequence of a REC serial number.	This is the value found at the end of a complete serial number. <b>Example:</b> 100 99999-AA-01-2022-123456-1 to <u>100</u>
etag_id	The e-Tag ID as received from OATI.	
start_date	The e-Tag start datetime in UTC.	<b>Example:</b> 2023-01-01T07:00:00
stop_date	The e-Tag end datetime in UTC.	<b>Example:</b> 2023-01-31T16:00:00
quantity	The total number of e-Tags you want to match to the identified certificates.	The quantity cannot exceed the total available e-Tags or the number of certificates in the identified REC batch.
quantity_unit	Set to 'mwh'.	

