Align PDS User Guide

ALIGN

Welcome to the Align User Guide for the Periodic Data Submittals (PDS) module specific to the registered entity role. Along with the Align instructional videos, this user guide will help you navigate through all the features included in this module. Click on a topic in the list below or in the ribbon above to begin.

1. Accessing Align
2. PDS Overview
3. Responding to a PDS Request
4. PDS Requests for Extension
5. Requests for Information
6. Findings
7. Related Issues

8. PDS Attestations
9. Reopened PDS Requests
10. PDS Submittals Tab
11. Completed PDS Requests Tab
12. Create PDS Tab

Notice: Updates to the PDS and Attestation functionality remain under development as of this version update. This User Guide reflects current functionality in the Align and updates will be made as future releases are deployed to improve PDS and Attestation functionality.

This email icon indicates when an email notification will be sent to the CEA

Accessing Align

*From the **Align Log-in Page***

1 Enter the **Align Username**

2 Enter the **Align Password**

Notice: All Align users MUST have an ERO Portal Account. Refer to the Align User Access Guide for details.

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PDS Overview

CEAs require Periodic Data Submittals in accordance with the schedule stated in the applicable Reliability Standards; please refer to the current ERO Enterprise Periodic Data Submittals Schedule for further information. Each CEA issues annual and quarterly PDS requests for the required standards. A few standards have additional data submittals to the CEA specified in their requirements, typically based on the date of occurrence of specific events.

Within the PDS module, entity users can access PDS requests awaiting response, PDS in review with CEAs, completed PDS, create PDS for certain requirements (event driven), and quickly locate PDS requests for extension.

Responding to a PDS Request

Requests for PDS are sent to the Primary Compliance Contact (PCC).

To navigate to the **Periodic Data Submittal** view:

1. Click the **Dropdown Arrow.**

2. Click the **Periodic Data Submittal** view.

3. Click the **Active PDS Requests** tab.

Notice: For Coordinated Oversight groups, entities will receive PDS for each region.

Responding to a PDS Request

4 Click the **PDS ID** to open the PDS Request and view details, such as: monitoring period, dates to submit response, and description of the PDS request.

5 To begin responding, you will need to assign the requirement(s) in the PDS request by clicking the **Click to Assign** link.

Notice: The *Submit on or After* (A) date indicates when an entity can start entering information, but you may have visibility of the PDS before that date. The due date of entity response is the date listed for *But no later than.*

Periodic Data Submittals ▼

Align For Entities ▼
NCR9999999 Second Day Training Test 2 Editor 2

⎺⎼ Active PDS Requests | ⎺⎼ PDS Submittals | ⎺⎼ Completed PDS Requests | ⎺⎼ Create PDS

ACTIVE PDS REQUESTS AWAITING MY RESPONSE

PDS ID	TYPE	REPORTING PERIOD	ENTITY	SHORT NAME	DUE DATE
PDS2022-000012	PRC-023-4 R5.				
PDS2022-000013	C-023-4 R5.				
PDS2021-002403	FAC-003-4				
PDS2021-002402	FAC-003-4				
PDS2021-001849	FAC-003-4				
PDS2021-002355	FAC-003-4				
PDS2021-002123	FAC-003-4				
PDS2021-002124	FAC-003-4				
PDS2021-001840	FAC-003-4				

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INSTRUCTIONS

Above are Periodic Data Submittals awaiti
on behalf of your company, you will be ask
asked to submit data to the SEL.

Period Data Submittals that have been se
can get a locker reference for your PDS th

Test PDS

Unique ID	PDS2022-000013		
PDS for	PRC-023-4 R5.	Region/LRE	MRO
Registration	NCR9999999 - Second Game Day Friday Entity in MRO		
PDS Name	Test PDS		
Description of Request			
Submit on or after	April 15, 2022	Monitoring Period Start	April 1, 2022
But no later than	April 29, 2022	Monitoring Period End	April 8, 2022

A

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.

PDS ASSIGNMENTS

SUBJECT	▲ REVISION	STATUS
PRC-023-4 R5. Click to Assign	Not Assigned	Not Assigned

Update **Close**

Responding to a PDS Request

ALIGN

6 Click the **Click Here to Finalize** link.

7 Click the **Link i**con to select an Assignee.

To remove an assignee, check the checkbox click the **Unlink** icon.

8 Select **Assign** from the Action dropdown menu.

9 Click **Update.**

Test PDS

PDS for	PRC-023-4 R5.	Region/LRE	MRO
Registration	NCR9999999 - Second Game Day Friday Entity in MRO		
PDS Name	Test PDS		
Description of Request			
Submit on or after	April 15, 2022	Monitoring Period Start	April 1, 2022
But no later than	April 29, 2022		

Questions

Instructions: To create a new Assignment
Once Assignment is creat
Open the questions below
Need more time? Scroll d
Have evidence to upload?

PDS ASSIGNMENTS

SUBJECT

PRC-023-4 R5.
Assignment Finalization Incomplete - Click here to Finalize **6**

Update   Close

AS-22-00000030

Assignment

Instructions: Assignment must have only **One** Person assigned.
To submit the Assignment, select **Assign** in the **Action** field and click the **Save** button.

Persons

☐ ASSIGNEE

✔ NCR9999999 Second Day Training Test 2 Editor 2   **7**

PDS Scope   PRC-023-4 R5. ✕

Action

Action   Assign   **8**

-- None --
None
Assign

9 Update   Close

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Responding to a PDS Request

10 Click the **Click here to answer** to open the PDS questions.

11 Respond to the questions specific to the PDS.

Notice: You will not be able to edit your responses to the questions after you click **Save**. If you are not ready to mark your responses final, click **Save Draft.**

Also, there are often links to specific forms (A) you will need to upload to the SEL. If you answer no, there may be no need to upload to the SEL. If you have questions, contact your region to review.

12 If responses are final, click **Save.**

13 Click **Yes.**

Responding to a PDS Request

If you need to assign the PDS questions to someone else, click **Assign Again (A).**

Notice: Upon using the Assign again functionality, a new row will be populated into the PDS assignments portlet. This row will say **Assignment Finalization Incomplete – Click here to Finalize (B).**

Once assigned, the new row and previous assignment row will show (appearing duplicated). Currently, this duplication cannot be avoided but may be fixed in future enhancement work.

Test PDS

Description of Request

Submit on or after	April 15, 2022	Monitoring Period Start	April 1, 2022
But no later than	April 29, 2022	Monitoring Period End	April 8, 2022

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.

PDS ASSIGNMENTS

SUBJECT	REVISION	STATUS
PRC-023-4 R5.	Assign Again Assigned to you (NCR9999999 Second Day Training Test 2 Editor 2) - Click here to answer	Initial Response	NEW

A

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PDS ASSIGNMENTS

SUBJECT	REVISION	STATUS
PRC-023-4 R5. Assignment Finalization Incomplete - Click here to Finalize	Not Assigned	Not Assigned
PRC-023-4 R5.	Assign Again Assigned to Courtney Vetter |View Draft	Initial Response	NEW
PRC-023-4 R5.	Assign Again Assigned to you (NCR91015 MRO Editor 1) - Click here to	Initial Response	NEW

B

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Responding to a PDS Request

14 To upload evidence for the PDS to the ERO SEL, use the provided SEL Reference ID.

15 If the PDS response is ready for region review, in the Action section, select **Submit** from the dropdown and check the box indicating evidence is uploaded (A).

Notice: If you are not ready to submit your PDS response, select **In Progress**. Or, if you have no data to provide, select **Submit Without Data**.

16 Click **Update** and the PDS will be submitted to the region.

The PDS will now appear under the PDS Submittals tab.

Notice: **Submitting without Data** will list the PDS in the Completed PDS Requests tab.

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Click here to make an Attestation

Click here to Request an Extension

Evidence

Secure Evidence Locker Instructions — Submit Evidence or Attachments related to this item via ERO Secure Evidence Locker (SEL) located at **https://eusstg.eroenterprise.com/nerc-infrastructure** with the following reference number:

14 **WECC|NCR55555|PDS2024-000009|PDS2024-000009|FAC-003-4||**

If the entity is hosting its own SEL, please provide a hyperlink to their locker in the comment section above.

Action

Instructions — Please select "Submit" in the Action option below if you have uploaded PDS form to the SEL. Select "Submit Without Data" in case you have not submitted any data. In case you requested a Request for Extension please leave the status "In Progress". Click "Update" to save the PDS and process it according to the selected Action.

Action * — Submit **15**

A I have uploaded evidence related for this PDS to the SEL — ☐

Action * — In Progress
- In Progress
- Submit Without Data
- Submit

Update Close **16**

PDS Requests for Extension

ALIGN

To request an extension for an active PDS:

1 In the Active PDS Request tab, click the **PDS ID.**

2 Click to expand the **Request an Extension** section of the PDS.

3 Click the **plus icon.**

PDS Requests for Extension

ALIGN

(4) Select a **Requested New Due Date** for the PDS.

(5) Provide a **Reason for extension** in the textbox.

(6) Click **Update.** Once Update is clicked, the request is immediately sent to the region.

(7) In the Action Section, select **In Progress.**

(8) Click **Update.**

Create Request for Extension ✕

Request for Extension

Source Registration * NCR55555 - Test Entity Name Change in WECC
Parent Source * PDS2021-001136
Standard / Requirements / * Part FAC-003-4
Requested New Due Date * 📅 **(4)**
Reason for extension * **(5)**

Action

Action Send
Update will send this RFE to the CEA.

FORM-CEA_RFE_Review

Update Close **(6)**

PDS2021-001136 ✕

Click here to Request an Extension

Click on the + sign to add a new Request for Extension ＋

LABEL	REQUEST DATE	SOURCE DUE DATE	REGION APPROVE DATE	REASON FOR REQUEST	REGION COMMENT	REQUIREMENTS	STATUS
RFE / 000064	10/31/2024	09/30/2021		Revision needed.		FAC-003-4	Requested
RFE-000042	12/01/2021	09/30/2021		Reason	asdfa	FAC-003-4	Disapproved

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Note: To view newly created Requests for Extensions please refresh the table above.

Evidence

Secure Evidence Locker Instructions: Submit Evidence or Attachments related to this item via ERO Secure Evidence Locker (SEL) located at **https://eusstg.eroenterprise.com/nerc-infrastructure** with the following reference number:

WECC|NCR55555|PDS2021-001136|PDS2021-001136|FAC-003-4||

If the entity is hosting its own SEL, please provide a hyperlink to their locker in the comment section above.

Action

Instructions: Please select "Submit" in the Action option below if you have uploaded PDS form to the SEL. Select "Submit Without Data" in case you have not submitted any data. In case you requested a Request for Extension please leave the status "In Progress". Click "Update" to save the PDS and process it according to the selected Action.

Action * In Progress ▼ **(7)**

Update Close **(8)**

PDS Requests for Extension

(9) To check the status of a Request for Extension, navigate to the PDS RFEs tab and check in the status column (A).

Notice: Status will be listed as either Approved, Disapproved or Requested.

| | Active PDS Requests | PDS Submittals | Completed PDS Requests | Create PDS | PDS RFEs **(9)** |

RFES RELATED TO PDS

	RFE ID	RELATE...	REGISTRATION	ORIGINAL DUE DATE	REQUESTED DUE DATE	NEW DUE...	STATUS	CRE...	MOD... BY
⤴	RFE-000004			07/07/2021	07/14/2021	07/15 **A**	Approved	NCR0101 Editor 1	Admin Admin

Requests for Information

ALIGN

To respond to a PDS Request for Information:

1 Navigate to the **My Align dashboard.**

2 Click the **Unique ID** to open the Request for Information. RFIs can also be opened from the PDS record opened through the PDS module.

3 Type comments in the **Respondent Comments** textbox and upload any needed evidence to the ERO SEL.

4 If the response is ready, click **Save and Action** to send the response for region review or click **Save** to continue drafting.

Notice: Regions can send RFIs anytime after the PDS has been sent to the entity.

My Align

My Dashboard and Tasks

Align For Entities

NCR9999999 Second Day Training Test 2 Editor 2

Assigned To Me

ALIGN

NEWS AND UPDATES

Welcome to Release 1 of the **Align** system! This is your **Dashboard** screen. Navigate the system by selecting activities above. You can create Self Reports and Self Logs from the **Compliance Mo...** (both those yo... ...d and those created by your R... Activities and ... Plans.

MY TASKS

TYPE	UNIQUE ID	REGION OR LRE
RFI for Mitigation	2020-00087 | 20-000064-R	MRO
RFI for Mitigation	2020-00108 | 20-000086-R	MRO
RFI for Mitigation	2020-00715 | 20-000214-R	RF
RFI for Mitigation	2020-00723 | 20-000221-R	RF
RFI for PDS	| RF21-000364	MRO
RFI for PDS	| RF21-000378	MRO
RFI for TFE	| RF21-000344	MRO
RFI for TFE	| RF21-000352	MRO

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| RF21-000378

Request for Information

Original Finding

Requestor | MRO Editor 1

Requestor Comments | test

Requestor Attachments

Request Sent On | June 11, 2021

Response Due By | July 11, 2021

Respondent Comments

Evidence

Secure Evidence Locker Instructions | Submit Evidence or Attachments related to this item via ERO Secure Evidence Locker (SEL) located at **https://eusstg.eroenterprise.com/nerc-infrastructure** with the following reference number:

||Test 5-24 EM|Test 5-24 EM,RF21-000378|||

If you are hosting your own SEL, please provide a hyperlink to your locker in the comment section above.

Action

Save and Action | Save | Close

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Findings

Any Findings related to the scope of the PDS can be reviewed through the Findings section of the PDS record.

To locate:

1 Navigate to either the **PDS Submittals (A)** or **Completed PDS Requests (B)** tab.

2 Click on a **PDS ID**.

3 Scroll to the **Findings** section **a**nd click to expand.

4 Click on any **ID**, if any, to see further details about the finding.

Related Issues

After review of the PDS response, the CEA may have offer other conclusions. These include Positive Observations, Areas of Concern, and Recommendations.

If the CEA includes any of these conclusions, they will be visible once the PDS is marked completed.

To locate them, if any:

1 Navigate to **Completed PDS Requests**.

2 Click on a **Unique ID**.

3 Scroll to **Related Issues** section.

Related Issues

ALIGN

For any Related Issues included with PDS, it will show the Issue Type, related Registration and Standard/Requirements.

To view the details of the Issue:

4 Click on an **Issue ID**, if any, to view more information.

5 Review details, particularly the **Description** field.

6 Click **Close** when finished.

Notice: The "Issue Status" column (A) may indicate an issue is not yet final and "draft." Please contact the CEA to clarify if the issue is final.

Currently, entities are not automatically notified of Related Issues on PDS and will need to navigate to this section to identify such records.

PDS2024-000009

Related Issues

PARENT NAME	ISSUE TYPE	ISSUE ID	REGISTRATION	STANDARD / REQUIREMENTS	ISSUE STATUS
PDS2024-000009	Area of Concern	AC24-00049	NCR55555 - Test Entity Name Change in WECC	FAC-003-4	Draft
PDS2024-000009	Positive Observations	PO24-00040	NCR55555 - Test Entity Name Change	FAC-003-4	Draft
PDS2024-00					

PO24-00040

General

Name	Test PO	ID	PO24-00040
Description	This is a drafted positive observation.		
Related Parent	PDS2024-000009	Created On	December 2, 2024
		Prepared By	WECC Editor 1
Registrations	NCR55555 - Test Entity Name Change in WECC	No Additional Review Needed	No
Standard / Requirements	FAC-003-4	Status	Draft

Comments

Reviewer Comments		
Follow-up Comments		
Reviewed By		Reviewed On

FORM-02_Edit_Positive_Obs_PDS

Close

PDS Attestations

Attestations are used when a PDS is not applicable to an entity.

To create an Attestation for a requirement related to a PDS:

1 In the Active PDS Request tab, click the **PDS ID** to open the PDS.

2 Click to expand the **Attestation** section.

3 Click the **plus icon.**

Notice: Currently, attestations are not able to be approved by the CEA.

At the time of updating this User Guide, there are ongoing enhancements ready for future Align deployments to fix Attestation functionality. User Guides will be updated when the deployment(s) occur. The following information reflects the limited functionality that currently exists.

PDS Attestations

(4) Type justification comments in the **Notes textbox**; this is required information.

(5) Click **Update** to save the Attestation.

(6) Click **Update** to send the attestation request to the region.

To review submitted attestations, navigate to the **Attestations** Module and click **Active Attestations** tab or **Attestations in Review** tab.

At the time of updating this User Guide, there are ongoing enhancements ready for future Align deployments to fix Attestation functionality. User Guides will be updated when the deployment(s) occur. The following information reflects the limited functionality that currently exists.

Create Applicability Exception

General

Source   Attestation
Registration   NCR55555 - Test Entity Name Change in WECC   Function(s)   GO

Standard   FAC-003-4   Requirement   Part

Notes

(4)

FORM_01_Create_Attestation

(5) Update   Close

Click here to make an Attestation

CREATE ATTESTATION

ATTESTATION SCOPE	FUNCTION	CREATE ATTESTATION
FAC-003-4	GO	+
FAC-003-4	TO	+

ATTESTATION OVERVIEW

ATTESTATION ID	ATTESTATION SCOPE	EFFECTIVE DATE	RENEWAL DATE	STATUS
AE / 000074	FAC-003-4	10/17/2024		Requested

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(6) Update   Close

PDS Attestations

To navigate to the **Attestations** view:

1   Click the **Dropdown Arrow.**

2   Click the **Attestations** view.

3   Navigate between the tabs as needed.

If there is an Attestation to reaffirm, click the **Attestations to Reaffirm tab.**

At the time of updating this User Guide, there are ongoing enhancements ready for future Align deployments to fix Attestation functionality. User Guides will be updated when the deployment(s) occur. The following information reflects the limited functionality that currently exists.

Reaffirming PDS Attestations

4 Click **Reaffirm** in the action column.

5 Select **Reaffirm** from the **dropdown.**

6 Type any **comments** to support reaffirmation.

7 Click **Update.**

At the time of updating this User Guide, there are ongoing enhancements ready for future Align deployments to fix Attestation functionality. User Guides will be updated when the deployment(s) occur. The following information reflects the limited functionality that currently exists.

Bulk PDS Reaffirmations

To reaffirm multiple Attestations:

1 Click the **Bulk Reaffirm** button.

2 Click the **link icon.**

3 Check the **checkbox** next to the relevant attestations to affirm.

4 Click **Confirm** once all selected.

At the time of updating this User Guide, there are ongoing enhancements ready for future Align deployments to fix Attestation functionality. User Guides will be updated when the deployment(s) occur. The following information reflects the limited functionality that currently exists.

Bulk PDS Reaffirmations

5 Select **Reaffirm** from the **dropdown.**

6 Type any **comments** to support reaffirmation.

7 Click **Update.**

Create Attestation Reaffirmation

Instructions Click the link on the left to choose one or more Attestations you would like to relate to this Reaffirmation.
Then, select "Reaffirm," provide a comment below, and click Update to submit your Reaffirmation. Select Close to cancel.

	APPLICABILITY EXCEPTIO...	NAME	REGISTRATION	STANDARD	REQUIREMENT	PART
☐	AE / 281070	AE / 281070	NCR9999999 - Second Game Day Friday Entity in MRO		PRC-023-4 R5.	

Attestation Reaffirmation

Reaffirm
-- None --
Reaffirm
No Action

Reaffirmation Comment

FORM_02_RE_Reaffirm_Attestation

Update Close

At the time of updating this User Guide, there are ongoing enhancements ready for future Align deployments to fix Attestation functionality. User Guides will be updated when the deployment(s) occur. The following information reflects the limited functionality that currently exists.

Reopened PDS Requests

Your CEA may need to re-open a PDS after submitted by the entity.

The only difference with a re-opened PDS is how you respond to the Questions section. To respond:

1 Navigate the re-opened PDS and click the **Revise** link where needed.

2 **Close** or **Cancel** the screen that pops up.

3 Locate the "Revision" for assignment and click on the **Click here to answer** link. Complete the question set as needed.

PDS ASSIGNMENTS

SUBJECT	REVISION	STATUS
FAC-003-4 | Assign Again Assigned to Justin Lofquist |View Draft	Initial Response	NEW
FAC-003-4 Answered by NCR55555 Test Company in WECC Editor 1 |View Answers	Initial Response	COMPLETED **1** Revise
FAC-003-4 | Assign Again Assigned to Harsimran Ahuja |View Draft	Initial Response	NEW

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Please answer the following questions: - Google Chrome

nerc-uat.bwise.net/bwise/app/today/editors/AssessmentSessionEditor.jspx?dataObjectI...

Please answer the following questions:

| Subject: | NCR9999999 - Second Game Day Friday Entity in MRO |
| Section: | FAC-003-4 |

2

Save Draft   Save   Cancel

PDS ASSIGNMENTS

SUBJECT	REVISION	STATUS
FAC-003-4 | Assign Again Assigned to you (NCR55555 Test Company in WECC Editor 1) - Click here to answer	Revision 1 **3**	NEW
FAC-003-4 | Assign Again Assigned to Kevin Koloini |View Draft	Initial Response	NEW
FAC-003-4 | Assign Again Assigned to Victor Munoz |View Draft	Initial Response	NEW

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PDS Submittals Tab

The **PDS Submittal** tab displays all Periodic Data Submittal requests that have been submitted to the CEA for review.

Periodic Data Submittals will remain in this tab until the CEA either completes their review, at which point it will move to the **Completed PDS Requests** tab, or flags the PDS for revision, at which point it will move back to the Active PDS Requests tab.

ALIGN

Periodic Data Submittals ⌄   Align For Entities ⌄

| Active PDS Requests | PDS Submittals | Completed PDS Requests | Create PDS | PDS RFEs | NCR55555 Test Company in WECC Editor 1

MY SUBMITTED PDS

PDS ID	TYPE	REPORTI... PERIOD	ENTITY NAME	SHORT NAME	START DATE	SUBMITTAL DATE	DUE DATE	SUBMITTED BY	CREATE...	MODIFIED BY	MODIFIED ON
PDS2024-000009	FAC-003-4	09/26/2023 -...	NCR55555 - Test Entity Name Change in WECC	User Guide Test PDS	10/17/2024	10/17/2024	10/31/2024	NCR55555 Test Company in...	ImportUser	NCR55555 Test...	10/17/2024
PDS2021-001135	FAC-003-4	07/01/2021 -...	NCR55555 - Test Entity Name Change in WECC	Demo - FAC-003 - PDS	09/17/2021	09/20/2021	09/30/2021	NCR55555 Test Company in...	ImportUser	NCR55555 Test...	08/24/2023
PDS2021-001134	FAC-003-4	07/01/2021 -...	NCR55555 - Test Entity Name Change in WECC	2021Q3 FAC PDS Demo	09/16/2021	09/16/2021	10/20/2021	NCR55555 Test Company in...	ImportUser	NCR55555 Test...	08/24/2023

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Completed PDS Requests Tab

The **Completed PDS Requests** tab displays all Periodic Data Submittal requests that are in or have been review by the CEA. The status column will display one of the following statuses:

In Review – The PDS is under review.

Closed Without Data Submission – The PDS has been closed as no data was required to be reviewed.

Review Completed with PNC – Review of PDS completed with a PNC identified.

Review Completed without PNC – Review of PDS completed without a PNC identified.

Create PDS Tab

The **Create PDS** tab is used for Standards and Requirements with event-based reporting (e.g. EOP-008 R8, PRC-002 R12, etc.).

When a reportable event occurs, navigate to this tab and select the **"+"** **(A)** icon next to the applicable Standard or Requirement and complete the form. Upon submission this will go to the CEA for review and the process will continue as normal.

Notice: Forms are unique for each of the Standards and Requirements on this tab. Ensure the correct Standard/Requirement has been selected.

Email Notifications in Align

The list below contains all instances when Align will generate an email to the CEA under the scope of Periodic Data Submittals.

✉ PDS Extension Request

Appendix: Revision History

Revision Date	Brief Description of Updates
2021	Initial release of guide (Align Release 2)
December 2024	Retitled user guide to reflect Align module rather than Release 2 Corrected typos Updated steps and screenshots to match recent updates in PDS module