Align PDS Module User Guide

ALIGN

Welcome to the Align User Guide for the Periodic Data Submittals (PDS) module specific to the CEA role. Along with the Align **instructional videos**, this user guide will help you navigate 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 Create a PDS Distribution

4 Attestations

5 Submitting the PDS Distribution

6 PDS Requests for Extension

7 Reviewing a PDS

8 Request Revision

9 PDS Requests for Information

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11 Completing PDS Review

12 Creating a Finding from PDS

13 Submitting a Finding from PDS

14 Creating Template PDS Distribution

15 Cancelling PDS Requests

16 Reopening PDS Requests

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 a Registered Entity

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 CEAs Align User Access Guide for details.

SAi36O

User Name:

Password:

OK

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, CEA users can access creating a distribution, scheduled PDS, active PDS, PDS in review, completed PDS, processed distributions, affected regional entity PDS, requests for information, and requests for extensions.

Note Align is configured to only allow creating PDS Distributions for specific requirements.

PDS Overview

In the CEA view of the PDS module in Align, there are several tabs with different purposes:

Create Distribution – Create new PDS distributions.

Scheduled PDS – Lists scheduled PDS distributions but not yet visible to entities.

Active PDS – Lists active PDS requests pending entity responses.

PDS in Review – Lists PDS requests submitted for review.

Completed PDS – Displays all completed PDS requests.

Processed Distributions – Lists processed PDS distributions and may be used to create distribution templates or locate favorite templates.

ARE PDS – Displays PDS requests for which the CEA is an Affected Regional Entity (ARE) in the Coordinated Oversight Program.

PDS RFIs – Lists active PDS Requests for Information.

PDS RFEs – Lists all PDS Requests for Extension.

Create a PDS Distribution

To create a PDS Distribution:

1 Use the dropdown to navigate to the **Periodic Data Submittal** view.

2 Click the **+** button to add a new draft PDS distribution. This opens a menu of PDS options.

3 Select the desired PDS option to continue.

Create a PDS Distribution

4 Enter a unique title for this PDS in the **Short Name** field. This will be visible to entities.

5 Click the **calendar** icon to enter dates.

Visibility Date: The date the entity can see the PDS.

Start Date: The date the entity can begin editing the PDS.

Due Date: The date the entity is expected to submit its PDS response to the CEA. Ensure the entity is provided the required time per the Rules of Procedure, Appendix 4C.

Notice: The Visibility Date and Start date will automatically populate to the current date.

Create Periodic Data Submittal Distribution ✕

General

4 Short Name * FAC-003 - NCR55555 Demo

Visibility Date * ⓘ 08/13/2024

Start Date * ⓘ 08/13/2024 **5**

Due Date * ⓘ

Monitoring Period Start *

Monitoring Period End *

Compliance Enforcement * MRO
Authority

Action

Instructions Please click "Update" to save your Distribution. The Distribution will be saved as a draft and can be accessed once you refresh the dashboard.

Update   Close

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Create a PDS Distribution

6 Click the **calendar** to select the **Monitoring Period Start** and **Monitoring Period End** dates to define the PDS monitoring period.

7 Click the **Update** button.

Notice: The PDS will now appear in the "Bulk Distributions in Draft" list. You may need to refresh the list for your draft distribution to show.

Create Periodic Data Submittal Distribution ✕

General

Short Name *   FAC-003 - NCR55555 Demo

Visibility Date * ⓘ   08/13/2024 📅

Start Date * ⓘ   08/13/2024 📅   Monitoring Period Start *   📅 **6**

Due Date * ⓘ   📅   Monitoring Period End *   📅

Compliance Enforcement * Authority   MRO

Action

Instructions   Please click "Update" to save your Distribution. The Distribution will be saved as a draft and can be accessed once you refresh the dashboard.

[Update]   Close

7

Create a PDS Distribution

ALIGN

8 Locate the draft you just created and click the **Distribution ID** to open the PDS. You may need to click the refresh button (A).

9 Verify that the dates for **Visibility**, **Start**, **Due**, **Monitoring Period Start** and **Monitoring Period End** are correct.

10 Add a description for this distribution in the field labeled **Description**.

Notice: Any text added to this field will be visible to the entity(ies) that are included in this distribution.

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Create a PDS Distribution

PDS Distributions can be configured specific to registered entities and Function(s) selected. To update Functions:

(11) Scroll to the **Function Selection** section and verify the reliability functions are correct for the scope of the PDS.

(12) If you wish to add or remove a reliability function, select **Click here to add or remove Functions.**

Notice: If the distribution is to be sent to multiple entities, it is recommended to start with Function Selection, as the list of entities will be filtered based on the functions selected.

Test 5-21

Compliance Enforcement Authority: MRO

Registered Entity Selection

REGION	NCR	REGISTRATION	PCC	CO GROUP
		This table is empty		

＋ Click here to Retrieve Applicable Registrations

Function Selection

Reliability Functions   GO; TO

(11) Click here to add or remove Functions

(12) Update   Close

Create a PDS Distribution - Function Selection

To add a reliability Function:

1 Click the **link** icon.

2 Select the **box** next to the reliability function you wish to add.

3 Click **Confirm.**

4 Click **Update.**

Notice: Align has saved your action but will not reflect the changes you just made until you click Update on the PDS form (A).

PDS Function Selection

Function Selection

	NAME
	TO

1

Relate Existing

SELECT FUNCTIONS

	FUNCTION
✔	GO
	TO

2

4 Update Close

Function Selection

Reliability Functions   GO; TO

Click here to add or remove Functions

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3 Confirm Close

PDS Distribution

A Update Close

Create a PDS Distribution - Function Selection

To remove a reliability function:

1 Select the **box** of the reliability function you wish to remove.

2 Click the **unlink** icon.

3 Click **Update.**

Notice: Align has saved your action but will not reflect the changes you just made until you click Update on the PDS form (A).

Create a PDS Distribution - Entity Selection

To add entities to the PDS Distribution, you can add *all* registered entities associated with the selected Functions or select individual registrations.

1 To load all registrations associated with the functions selected, select **Click here to add all applicable Registrations to this PDS.**

You can add or remove registrations by selecting the **Click here to add or remove Registrations** hyperlink now appearing (A) if you want to remove any specific registrations.

2 Click **Update,** as Align has saved your action but will not reflect the changes you just made until you Update on the PDS form.

Create a PDS Distribution - Entity Selection

3 To select specific registrations associated with the functions selected, select **Click here to create an empty Registration List and add individual Registrations.**

You can add or remove registrations by selecting the **Click here to add or remove Registrations** hyperlink now appearing (A).

4 Click the **link icon.**

5 Check the **box(es)** next to the registered entities you wish to add to this PDS Distribution.

6 Click **Confirm** in Relate Existing window.

7 Click **Update** in PDS Registration Selection window.

Create a PDS Distribution - Entity Selection

To remove a registered entity from the draft PDS Distribution:

1 In the Registered Entity Selection section, click the **hyperlink.**

2 Check the **box** next to the Registered entity you wish to remove.

3 Click the **unlink icon.**

4 Click **Yes** in Unrelate Elements window.

5 Click **Update.**

Notice: Align has saved your action but will not reflect the changes you just made until you click Update on the PDS form (A).

Create a PDS Distribution - Preview

From the Draft PDS Distribution, the PDS Distribution Section will display the entities and functions selected for the PDS Distribution.

If you made changes to selected entities or functions, ensure you have updated (A) the overall form to reflect such changes in the preview shown in this section.

Create a PDS Distribution - Attestations

When drafting a PDS Distribution, relevant Attestations will be displayed based on the selected entities and functions for the PDS created.

CEAs may use this information to manually remove entities from the PDS selection, if desired (refer to Registered Entity Selection section).

Currently, Attestations are not able to be approved by the CEA and will not appear in this box to reaffirm.

Notice: 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.

FAC-003 Test Distribution

The following Attestations are related to the entities you have selected. You can keep these entities, remove those entities from your selection, or request that they reaffirm their Attestation. **Note:** If there are no Active Attestations for the scope of the PDS, the table below will be empty.

BULK REAFFIRMATION

RELEVANT ATTESTATIONS

UNIQUE ID	REGISTRATION	APPLICABLE TO	EFFFECTIVE DATE	RENEWAL DATE	ATTESTATI... STATUS
AE / 000046		FAC-003-4	08/23/2021	09/16/2022	Reaffirmation Requested

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Update   **Close**

Create a PDS Distribution - Attestation Reaffirmation

To initiate reaffirmation of an attestation from a draft PDS Distribution:

1. In the **PDS Distribution Preview** section, click **Bulk Reaffirmation.**

2. Click the **link icon.**

3. Check the **box** next to the attestation(s) you wish to have reaffirmed.

4. Click **Confirm** in Relate Existing window.

Notice: 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 a PDS Distribution - Attestation Reaffirmation

5 Enter a **Reaffirm Renewal Date.**

6 Type any notes for the entity in the **Reaffirmation Request Comment** textbox.

7 Select **Submit** from the Action dropdown .

8 Click **Update.**

Notice: 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 Attestation Reaffirmation Request

AE / 281041   AE / 281041   TPL-001-4

Reaffirmation Renewal Date

Reaffirm Renewal Date

May 2021

Su Mo Tu We Th Fr Sa
25 26 27 28 29 30 1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31 1 2 3 4 5

Instructions   like to submit the reaffirmation request to the Regional Entity.

Reaffirmation Request Comment

Action   Submit
-- None --
Submit
No Action

Update   Close

Submitting the PDS Distribution

1. When the distribution is ready for sending, locate the **Bulk Distribution in Draft PDS.**

2. Click the **Distribution ID** to open.

3. In the Action section, select **Submit** from the dropdown.

4. Click **Update.**

Notice: PDS records will now appear either in (a) the Scheduled PDS tab if the Visibility Date occurs in the future or (b) the Active PDS tab if the Visibility Date is the date you are submitting.

PDS Requests for Extension

An entity may submit a Request for Extension (RFE) for the PDS. RFEs appear on the My Align dashboard and can be accessed from the PDS RFEs tab.

To approve/disapprove an RFE:

1 Locate the relevant Request for Extension (RFE) in the **Items Awaiting My Review** section in the My Align dashboard (A) or navigate to the **PDS RFEs** tab in the **Periodic Data Submittals** module (B).

2 Click the **RFE Unique ID** to open the RFE for review.

PDS Requests for Extension

3 Review the request and select **Approved** or **Disapproved** from the dropdown.

If you selected Approved:

4 Select the **New Due Date** for the PDS.

5 Type any **comments** in the textbox for approving.

6 Click **Update.**

If you selected Disapproved:

7 Type any **comments** in the textbox for disapproving.

8 Click **Update.**

Test 5-21 RFE-000122

Request for Extension

Registration NCR9999999 - Second Game Day Friday Entity in MRO
Original Due Date July 21, 2021
Requested Due Date July 13, 2021
Reason for Extension test

Approval of Request for Extension

Status: Approved

-- None --
Approved
Disapproved
Requested

New Due Date: 07/13/

July 2021

Su	Mo	Tu	We
27	28	29	30
4	5	6	7
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Approval Decision Comment

FORM: CEA_RFE_Review

Update   Close

Approval of Request for Extension

Status: Disapproved

Approval Decision Comment

FORM: CEA_RFE_Review

Update   Close

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Reviewing a PDS

To view entities' PDS responses submitted for CEA review:

1 Navigate to the **PDS in Review** tab.

2 Open the **PDS Unique ID** you wish to review.

3 In the **Entity PDS Response** section, click the **hyperlink** to open the entity's responses.

4 **Review** the entity's responses.

Reviewing a PDS – Request Revision

5 If you need the entity to update their response, select **Revise.**

6 In the **Note** textbox, provide an update to explain to the entity your revision request.

7 Click **Update.**

PDS Requests for Information

To send a Request for Information to an entity:

(1) In the **Requests for Information** section click the **plus icon.**

(2) Type request **comments** in the textbox and add any **attachments.**

(3) Select the **Response Due By** date.

(4) Click **Update.**

Notice: Clicking Update will send the Request for Information to the entity for their response. Their response will <u>not</u> appear on your My Align dashboard but will appear in the RFI section of the PDS. In addition, RFIs can be submitted at any time after distribution. RFIs should be placed in Completed status prior to Completing the Review.

Reviewing a PDS - Related Issues

To create a Positive Observation, Area of Concern, or Recommendation:

1 Navigate to the **PDS In Review tab.**

2 Click the **Unique ID** to open the PDS.

3 Click to expand the **Related Issues** section.

4 Click the applicable **plus icon** to add a:
(A) Positive Observation
(B) Area of Concern
(C) Recommendation

Notice: There is a delay after clicking the + sign to add Positive Observations, Areas of Concern, and Recommendations. Please be patient for the pop-up to open. Any additional clicking will result in multiple popup windows opening unnecessarily.

Reviewing a PDS - Related Issues

5 Fill out the information related to the Issue for the PDS.

6 Click **Save**.

Notice: The Related Issue that was just created will be in a "Draft" status by default. The user can choose to change the status to "Final" prior to saving, or the user can go back in and change the status to "Final" prior to completing the PDS Review. All issues should be completed prior to completing the PDS.

Also, entities are not automatically notified of any included Related Issues with the PDS review. CEAs should ensure the entity is notified if Related Issues are included in the completion of the PDS.

Completing a PDS Review

If you have completed your review and are ready to close the PDS:

(1) Select the appropriate **CEA Response** from the dropdown. If closed with PNC, ensure a Finding is created.

(2) Type any review comments in the **CEA Comment** textbox. Comments entered here are not visible to the entity.

(3) In the **Submit PDS Review** section, select **Review Completed** from the Action dropdown.

(4) Click **Update.**

Test 5-24 EM

Attachments — **Attach file**

CEA Response

CEA Response — Close with no PNC **(1)**

CEA Comment —
-- None --
In review
Close with PNC
(2) Close with no PNC

Submit PDS Review

Instructions — Please select "Review Completed" Action option when you have finalized the review and click "Update"

Action — Review Completed **(3)**

-- None --
Reopen
Review In Progress
Review Completed

(4) **Update**

Reviewing a PDS - Creating a Finding

To create a Finding related to the PDS:

1 Navigate to the **PDS In Review tab.**

2 Click the **Unique ID** of the PDS you wish to create a finding for.

3 Click to expand the **Findings** section.

4 Locate the relevant requirement and click the **plus icon.**

Reviewing a PDS - Creating a Finding

5 Following region processes, fill out the **Create a Finding** form.

6 Click **Save.**

The draft Finding created will display in the Findings section of the PDS, but the CEA will need to submit the draft from the **Findings** module in Align.

Ensure any changes to the PDS record are saved (pressing Update) before moving to next steps.

Notice: Refer to the **Align Enforcement and Mitigation User Guide** for additional instructions when creating a Finding.

Create a Finding

Instructions

Complete the information on this form and **Save** your Finding as a draft. You can access draft Findings under the **Drafts** section of the **Create Finding** tab and continue editing until you are ready to submit.

Created By CEA	Yes
Monitoring Method	Periodic Data Submittal

General Information

Registration	NCR55555 - Test Entity Name Change in WECC
Entity in Coordinated Oversight	No
Applicable Requirement	FAC-003-4 R1.
Applicable Part(s)	FAC-003-4 R1.1. × FAC-003-4 R1.2. × FAC-003-4 R1.3. × FAC-003-4 R1.4. ×
Applicable Reliability Function(s)	TO × GO ×

Region – Jurisdiction in which the Potential Noncompliance occurred: WECC-US

Other Region – Jurisdiction(s) where you are reporting this Potential Noncompliance

Discovery and Description

Save   Close

Reviewing a PDS - Submitting a Finding

To submit a Finding:

1 Navigate to the **Findings** module.

2 In the **Draft Findings** section, click the **Unique ID** of the Finding to open it.

3 If the Finding drafted is ready for next steps, in the **Action** section, select **Submit** from the dropdown.

4 Click **Save and Action.**

Notice: Clicking Save will only update the draft and will not *action* the Finding to a submitted state.

Creating a Template PDS Distribution

Previous PDS Distribution can be used to create templates for PDS Distributions.

To create a template from a previous PDS Distribution:

① From the Periodic Data Submittals module, navigate to the **Processed Distributions** tab.

② Click the **plus icon** next to the PDS distribution you wish to use for creating a template.

Creating a Template PDS Distribution

3 Type the **Short Name** and update any **Dates.** The short name will be visible to entities.

4 Add a description for this distribution in the field labeled **Description**.

Notice: Any text added to this field will be visible to the entity(ies) that are included in this distribution.

5 Click **Update.**

Notice: The draft PDS template created will now appear on the **Create Distribution** tab (A).

Create Periodic Data Submittal Distribution

General

PDS Type	FAC-003-4
Short Name *	
Visibility Date *	05/24/2021
Start Date *	05/24/2021
Due Date *	07/21/2021
Monitoring Period Start *	02/01/2021
Monitoring Period End *	02/28/2021
Description	test
Compliance Enforcement Authority	MRO

Previously

Registration(s)	NCR9999999
Reliability Function(s)	TO GO

Update

Periodic Data Submittals

Create Distribution | Scheduled PDS | Active PDS | PDS in Review | Completed PDS | Processed Distributions | ARE PDS | PDS RFIs

Align for Regions

PERIODIC DATA SUBMITTAL - BULK DISTRIBUTIONS IN DRAFT

	DISTRIBUTION	TYPE	FUNCTIONS	REPORTING PERIOD	SCHEDULED VISIBILITY ...	SCHEDU... START D...	SCHEDU... DUE DATE	SHORT NAME	DESCRIPTION
	DP2024-00014	FAC-003-4	GO, TO				11/21/2024	Creating a Template PDS Distribution.	This is a template test.
	DP2022-00128	PRC-023-4 R5	TO, GO				09/30/2022	Test Name	

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Creating a Template PDS Distribution

To mark a particular PDS distribution as a favorite:

1 From the Periodic Data Submittals module, navigate to the **Processed Distributions** tab.

2 Click the **Distribution ID** of the PDS distribution you wish to mark as a favorite template.

3 Select the **checkbox** next to Mark as Favorite/Template.

4 Click **Update.**

Notice: The PDS will now have a ribbon icon displayed next to it (A) and appear at the top of the Processed Distributions tab's list.

| Accessing Align | PDS Overview | Create a PDS Distribution | Attestations | Submitting a PDS Distribution | PDS Requests for Extension | Reviewing PDS | Request Revision | PDS Requests for Information | Related Issues | Completing a PDS Review | Creating a Finding | Submitting A Finding | Template PDS Distribution | Cancelling PDS | Reopening PDS |

Cancelling a PDS Request

To cancel a PDS request that was previously scheduled or sent to an entity:

1 Navigate to the **Active PDS** tab or the **Scheduled PDS** tab.

2 Click the **Unique ID** to open the PDS.

3 Click **Action (Optional – Click to Expand)** and then select **Cancel** from the dropdown.

4 Click **Update**.

Notice: A PDS request can only be canceled if it is in Active or Scheduled Status. To cancel a PDS in Review, the user must reopen the PDS to send it back to Active Status and then follow the steps to cancel.

Periodic Data Submittals

Create Distribution | Scheduled PDS | **Active PDS** | PDS in Review | Completed PDS | Processed Distributions | ARE PDS

PDS REQUESTS ACTIVE IN REGISTERED ENTITY PROCESSING

UNIQUE ID	TYPE	REPORTING PERIOD	REGISTRATION	▲ SHORT NAME
PDS2021-001678	FAC-003			
PDS2021-001840	FAC-003			
PDS2021-001844	PRC-02			
PDS2021-001849	FAC-003			
PDS2021-002118	FAC-003			
PDS2021-001676	FAC-003			
PDS2021-001697	FAC-003			
PDS2021-001819	FAC-003			
PDS2021-001655	FAC-003			

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INSTRUCTIONS

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Note: To view newly created Requests for Information please update the table above.

Evidence

Secure Evidence Locker Instructions — Submit Evidence or Attachments related to this item via ERO Secure Evidence Locker (SEL) located at with the following reference number:

MRO| |PDS2021-000745|PDS2021-000745|PRC-023-4|R5.|

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

Region Attachments

Attachments — Attach file

Action (Optional - Click to Expand)

Instructions — As CEA, you can cancel this PDS by clicking "Edit," then selecting "Cancel" from the action list below and clicking "Update."

Action — Cancel

Update   Close

Accessing Align | PDS Overview | Create a PDS Distribution | Attestations | Submitting a PDS Distribution | PDS Requests for Extension | Reviewing PDS | Request Revision | PDS Requests for Information | Related Issues | Completing a PDS Review | Creating a Finding | Submitting A Finding | Template PDS Distribution | Cancelling PDS | Reopening PDS

Reopening a PDS Request

Sometimes a PDS should be reopened to allow the Registered Entity to revise their response or for the CEA to add additional notes.

To reopen a completed PDS:

(1) Navigate to the **Completed PDS tab.**

(2) Click the **Unique ID** to open the PDS.

(3) Scroll to the **Action Section.**

Periodic Data Submittals ⌄

Create Distribution | Scheduled PDS | Active PDS | PDS in Review | **(1)** Completed PDS | Processed Distributions | ARE PDS

COMPLETED AND CANCELLED PDS REQUESTS

UNIQUE ID	TYPE	REPORTING	REGISTRATION	SHORT NAME	SUBMITTAL DATE	DUE DATE
PDS2021-001848	FAC-003-4					
PDS2021-001841	FAC-003-4					
PDS2021-001556	FAC-003-4					
PDS2021-001558	PRC-023-4					
PDS2021-001171	TPL-001-4					
PDS-000340	FAC-003-4					
PDS-000360	FAC-003-4					
PDS / 001094	FAC-003-4					
PDS2021-001319	FAC-003-4					
PDS2021-001322	FAC-003-4					
PDS2021-001474	FAC-003-4					
PDS2021-001853	FAC-003-4					
PDS2021-002118	FAC-003-4					

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Test 5-21

This table is empty

CEA Response

CEA Response — In review

CEA Comment

Evidence

Secure Evidence Locker Instructions — Submit Evidence or Attachments related to this Periodic Data Submittal via ERO Secure Evidence Locker (SEL) with the following reference number:

MRO|NCR9999999|VITest 5-21|VITest 5-21|FAC-003-4|

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

Region Attachments

Attachments — **Attach file**

(3) Action (Optional - Click to Expand)

Update   Close

Reopening a PDS Request

4 Click the **Action** section to expand it.

5 Select **Reopen** from the dropdown.

6 Click **Update.**

By reopening the PDS, it will be sent back to the PDS In Review tab and wait for CEA action and appear to the entity on their PDS Submittals tab.

The CEA can update any desired information, or if desired to send the PDS back to the entity, additional steps are required (see next page).

Test 5-21

CEA Response   In review

CEA Comment

Evidence

Secure Evidence Locker Instructions   Submit Evidence or Attachments related to this Periodic Data Submittal via ERO Secure Evidence Locker (SEL) with the following reference number:

MRO|NCR9999999|VITest 5-21|VITest 5-21|FAC-003-4|

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

Region Attachments

Attachments   **Attach file**

4 **Action (Optional - Click to Expand)**

Instructions   As CEA you can reopen this Periodic Data Submittal by selecting "Reopen" from the action list option below and click "Update"

Action   Reopen

Reopen **5**

-- None --

No Action

Reopen

6 **Update**

Reopening a PDS Request

To give the entity the ability to edit its response to the PDS request:

7 Navigate to the **PDS In Review** tab.

8 Locate the PDS and click the **Unique ID** to open the PDS request.

9 In the **Submit PDS Review** section, Select **Reopen** from the dropdown.

10 Click **Update.**

The PDS request will now appear on the Active PDS tab, and the entity will be able to edit its response.

Periodic Data Submittals

Create Distribution | Scheduled PDS | Active PDS | **PDS in Review** **7** | Completed PDS | Processed Distributions | ARE PDS

PERIODIC DATA SUBMITTALS AWAITING CEA REVIEW

UNIQUE ID	TYPE	REPORTING	REGISTRATION	SHORT NAME
PDS / 001093	FAC-003-4			
PDS2021-001142	FAC-003-4			
PDS2021-001172	TPL-001-4			
PDS2021-001620	EOP-008-2			
PDS2021-001843	TPL-007-4			
PDS2021-001845	FAC-003-4			
PDS2021-001848 **8**				

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INSTRUCTIONS

Test 5-21

Region Attachments

Attachments | **Attach file**

CEA Response

CEA Response | In review

CEA Comment

Submit PDS Review

Instructions | Please select "Review Completed" Action option when you have finalized the review and click "Update"

Action | Reopen | Reopen
| | -- None --
| | Reopen **9**
| | Review In Progress
| | Review Completed

10 **Update**

Email Notifications in Align

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

✉ Creation of Periodic Data Submittals

✉ PDS Extension Request Approval/Disapproval

✉ PDS Requests for Information

*An email is sent to NERC as well as the Registered Entity

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