



Align Self-Certification User Guide

Welcome to the Align User Guide for the Self-Certifications (Self-Cert) 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.

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- 5 Sending a Self-Certification Distribution
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Notice: Updates to the Self-Certifications 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 Self-Certifications 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.





Self-Certification Overview

There are two modules related to Self-Certifications for CEA users: Self-Certifications and Self-Certification Administration.

1 **Self-Certifications** module is used for creating new Self-Certifications Distributions as well as processing the Self-Certifications records themselves. The bulk of this User Guide focuses on the **Self-Certification** module.

2 **Self-Certification Administration** module is used for managing region-specific (custom) questions used by CEAs to augment Self-Certification requests.

The screenshot shows the 'My Align' application interface. A navigation menu is open on the left, listing various modules. Two items are highlighted with numbered circles: '1 Self-Certifications' and '2 Self-Cert Administration'. The main content area displays a table of items with columns for TYPE, UNIQUE ID, STANDARD AND REQUIREMENT, REGIONS, REGISTRATION, DUE DATE, and ASSIGNED TO. The table contains several rows of data, including 'Audit RFI', 'CE Letter Response', and 'CE Letter Response' entries with their respective IDs and due dates.

TYPE	UNIQUE ID	STANDARD AND REQUIREMENT	REGIONS	REGISTRATION	DUE DATE	ASSIGNED TO
Audit RFI	ME22-01399 RI23-007482	PRC-005-6 R1.	MRO-US		02/03/2023	MRO Editor 1
CE Letter Response	2021-00023	BAL-001-2 R1.	MRO-US	NCR9999999 - MRO - Training Energy Corp. MRO in MRO	02/25/2021	
CE Letter Response	2021-00029	CIP-007-6 R3.	MRO-US	NCR9999999 - MRO - Training Energy Corp. MRO in MRO	02/24/2021	
CE Letter Response	2023-00040	VAR-002-4.1 (Manitoba) R1.	MRO-MB			
CE Letter Response	2023-00031	CIP-003-8 (Saskatchewan) R3.	MRO-SK		06/09/2023	
CE Letter Response	2022-00038	BAL-001-2 R1.	MRO-US		02/24/2023	
CE Letter Response	2021-00027	CIP-005-6 R1.	MRO-US	NCR9999999 - MRO - Training Energy Corp. MRO in MRO		
CE Letter Response	2023-00001	BAL-001-2 R1.	MRO-US		12/06/2023	
CE Letter Response	2021-00018	CIP-003-7 R1.	MRO-US	NCR9999999 - MRO - Training Energy Corp. MRO in MRO		
CE Letter Response	2021-00032	CIP-004-6 R5.	MRO-US	NCR9999999 - MRO - Training Energy Corp. MRO in MRO	03/23/2021	



Self-Certification Overview

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

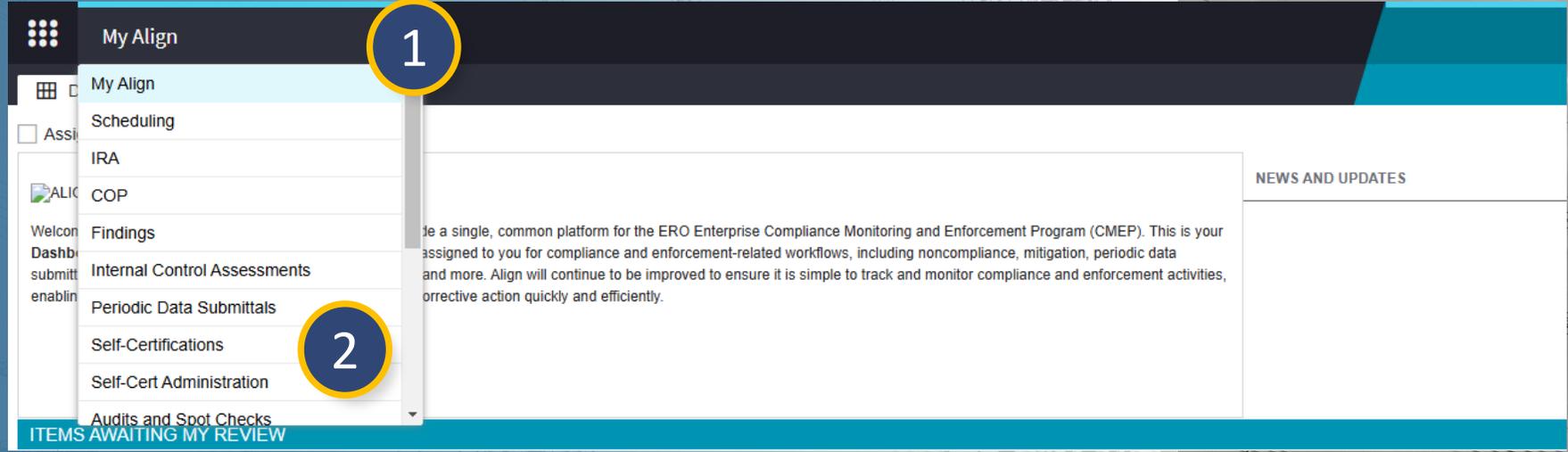
- Create Distribution** – Create new Self-Certification Distributions.
- Active** – Lists active Self-Certifications pending entity responses.
- Scheduled** – Lists scheduled Self-Certifications but not yet visible to entities.
- In Review** – Lists Self-Certifications submitted for review.
- Completed** – Displays all completed Self-Certification requests.
- Processed Distributions** – Lists processed Self-Cert distributions and may be used to create distribution templates or locate favorite templates.
- ARE Self-Certs** – Displays Self-Cert requests for which the CEA is an Affected Regional Entity (ARE) in the Coordinated Oversight Program.
- RFIs** – Lists active Self-Cert Requests for Information.
- RFEs** – Lists all Self-Cert Requests for Extension.



Create a Self-Certification Distribution

To navigate to the **Self-Certifications** module:

- 1 Click the **dropdown arrow**.
- 2 Select the **Self-Certifications** View.





Create a Self-Certification Distribution

There are 4 ways to create a Self-Certification Distribution:

Create Entity Distribution (A) button allows you to pre-select the applicable Registered Entities for the Self-Certification.

Create Function Distribution (B) button allows you to pre-select the Functions applicable to the Self-Certification.

Create Requirement Distribution (C) button allows you to pre-select the applicable Requirements for the Self-Certification.

General Self-Certification (D) does not pre-select entities, functions, or requirements but creates a basic version of a Self-Certification.

The screenshot shows the 'Self Certifications' application interface. At the top, there is a navigation bar with a dropdown menu for 'Self Certifications' and a button for 'Align for Regions'. Below this is a sub-menu with options: 'Create Distribution', 'Scheduled Self-Certs', 'Active Self-Certs', 'Self-Certs in Review', 'Completed Self-Certs', 'Processed Distributions', and 'ARE Self-Certs'. The 'Create Distribution' option is expanded, showing three buttons: 'CREATE ENTITY DISTRIBUTION' (labeled A), 'CREATE FUNCTION DISTRIBUTION' (labeled B), and 'CREATE REQ DISTRIBUTION' (labeled C). Below these buttons is a table titled 'SELF-CERTIFICATION - BULK DISTRIBUTIONS IN DRAFT'. The table has columns for 'REQUEST ID', 'REQUEST NAME', 'FUNCTIONS', 'STANDARD AND REQUIREMENT', 'START/DUE DATE', 'MONITORING PERIOD', and 'CREATED BY'. There are 8 rows of data. A fourth button, 'General Self-Certification' (labeled D), is located to the left of the table. At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and a refresh button. Below the table is an 'INSTRUCTIONS' section.

REQUEST ID	REQUEST NAME	FUNCTIONS	STANDARD AND REQUIREMENT	START/DUE DATE	MONITORING PERIOD	CREATED BY
DS2021-000288	dc test wecc - ncr05392	DP, GO, GOP, TO, TOP	CIP-002-5.1a R1.			Dan Chanda
DS2021-000287	dc test2					Dan Chanda
DS2021-000286	dc test					Dan Chanda
DS2021-000277	Defect testing 5/25/2021		CIP-002-5.1a R1., CIP-002-5.1a R2.	25 May 2021 25 Jun 2021	05/03/2021 - 05/22/2021	MRO Editor 1
DS2021-000270	EM Test 2	TO	FAC-003-4 R1.	19 May 2021 09 Jun 2021	02/01/2021 - 02/28/2021	MRO Editor 1
DS2021-000195	cvb 28-04	TOP	EOP-010-1 R3.	28 Apr 2021 23 May 2021	04/07/2021 - 05/31/2021	Caroline Van Bommel
DS2021-000186	FAC-008 retest of Ready for UAT 10585	GO, GOP	FAC-008-3 R6., VAR-002-4.1 R6.	26 Apr 2021 26 May 2021	04/22/2020 - 04/22/2021	MRO Editor 4
DS2021-000174	1904CVB Test1	DP-UFLS, TO		19 Apr 2021 27 May 2021	04/05/2021 - 04/30/2021	Caroline Van Bommel



Create a Self-Certification Distribution

To draft a general Self Certification Distribution:

- 1 Click the **plus icon**.
- 2 Enter a custom title for this Self-Cert in the **Name** field. This will be visible to entities.
- 3 Click the **calendar** icons to enter dates.

Visibility Date: The date the entity can see the Self-Cert.

Start Date: The date the entity can begin editing the Self-Cert.

Due Date: The date the entity is expected to submit its Self-Cert response to the CEA.

Notice: The Visibility and Start Date will automatically populate to the current date. The Due Date will automatically populate to 30 days from the current date.



Create a Self-Certification Distribution

4 Click the calendar to select the **Monitoring Period Start** and **Monitoring Period End** dates to define the Self-Cert monitoring period.

5 The **Instructions to entity** field, which will be visible to entities, can be used to provide additional instruction.

The **Instructions to entity** field should be used to provide clarity on requests of the Self-Certification, including if evidence is requested and contact information for follow-up questions from the entity.

Create Self Certification Distribution

General

Name *

Compliance Year

Visibility Date *  **4**

Start Date * 

Due Date * 

Monitoring Period Start *  **4**

Monitoring Period End * 

Instructions to entity **5**

Compliance Enforcement Authority **MRO**

Point of Contact

<input type="checkbox"/>	FIRST NAME	LAST NAME
This table is empty		

Action



Create a Self-Certification Distribution

If you wish to add a point of contact, you can link a CEA user in the **Point of Contact** section.

- 6 Click the **link icon**.
- 7 Check the **checkbox**.
- 8 Click **confirm**.
- 9 Click the **Update** button.

The Self-Certification distribution will now appear as a draft in the **Bulk Distributions in Draft** section.

Notice: When a Point of Contact is listed, it cannot be changed after the distribution is processed.

The screenshot shows the 'Create Self Certification Distribution' form. The 'General' section includes fields for Name, Compliance Year (2020), Visibility Date, Start Date, Due Date, Monitoring Period Start, and Monitoring Period End. The 'Point of Contact' section has a table with columns for 'FIRST NAME' and checkboxes. A 'Relate Existing' modal is open, showing a list of users with 'MRO Editor 1' selected. The 'Action' section at the bottom has an 'Update' button and a 'Close' button. A 'Confirm' button is visible in the modal.



Create a Self-Certification Distribution

To add Registered Entities to the distribution:

- 1 Click the **Request ID** of the draft distribution.
- 2 Navigate to the **Requirement, Function, and Entity Selection** tab.
- 3 Click the **hyperlink** to add or remove registrations.
- 4 Click the **link icon**.
- 5 Check the **box(es)** next to the registered entities you wish to add to this Self-Cert distribution.
- 6 Click **Confirm**.
- 7 Click the **Update** button.



Create a Self-Certification Distribution

To add a requirement to the distribution:

- 1 Navigate to the **Requirement, Function, and Entity Selection** tab.
- 2 In the **Requirement Selection** section, click the **hyperlink** to add or remove requirements.
- 3 Click the **link icon**.
- 4 Check the **box(es)** to select the requirements you wish to add.
- 5 Click **Confirm**.
- 6 Click the **Update** button.



Create a Self-Certification Distribution

To add a function to the distribution:

- 1 Navigate to the **Requirement, Function, and Entity Selection** tab.
- 2 In the **Function Selection** section, click the **hyperlink** to add or remove functions.
- 3 Click the **link icon**.
- 4 Check the **box(es)** to select the functions you wish to add.
- 5 Click **Confirm**.
- 6 Click the **Update** button.

The screenshot shows a multi-step process in a web application. The main window is titled 'Test 6-4 EM' and has tabs for 'Requirement, Function, and Entity Selection', 'Distribution and Question Preview', 'Attestations', and 'Action'. The 'Requirement, Function, and Entity Selection' tab is active, showing an 'NCR' section and a 'Function Selection' section. A 'Relate Existing' dialog box is open, showing a table with columns 'FUNCTION', 'GO', and 'TO'. The 'GO' and 'TO' rows are selected. A 'Self Cert Function Selection' dialog box is also open, showing a 'Function Selection' section with a table containing 'NAME' and 'GO' rows. The 'Update' button is highlighted. Numbered callouts 1 through 6 indicate the steps: 1. Clicking the 'Requirement, Function, and Entity Selection' tab; 2. Clicking the 'Click here to add or remove Functions' hyperlink; 3. Clicking the link icon; 4. Selecting the 'GO' and 'TO' rows in the 'Relate Existing' dialog; 5. Clicking the 'Confirm' button; 6. Clicking the 'Update' button.



Create a Self-Certification Distribution

To preview the drafted Self-Certification with chosen entities, requirements, and functions, navigate to the **Distribution and Question Preview** tab.

1 Review the **Self-Cert Distribution** Preview to confirm selections are correct.

2 Review the **Self-Cert Question Preview** to confirm questions are correct.

Notice: The draft distribution may need to be **Updated** (A) before the information will display in the preview.

Annual_SC_2021_
_Test
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General
Requirement, Function, and Entity Selection
Distribution and Question Preview
Attestations
Action

Self-Cert Distribution Preview 1

Your Self-Cert(s) will be sent to the following entities and functions, for the following Requirements.
Note: You have to save (update) this form to see any changes you made above reflected in this summary.

REGISTRATIONS	FUNCTIONS	REQUIREMENTS	PCC	ACC
	TOP, TO, TSP, TP	CIP-006-6 R2., CIP-008-6 R3., CIP-008-6 R1., CIP-008-6 R2., PRC-004-6 R1., TPL-001-4 R1., PRC-004-6 R5., TPL-001-4 R4,....	Ryan Walter	Barbara Walz

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Self-Cert Question Preview 2

QUESTIONS	QUESTIONSCOPE

A
Update
Close



Create a Self-Certification Distribution

To request an entity to reaffirm an attestation within the Self-Certification Request:

1. Navigate to the **Attestations** tab.
2. Click the **Bulk Reaffirmation** tab.
3. Click the **link icon**.
4. Check the **box** next to the attestation you wish to reaffirm.
5. Click **Confirm**.

Attestations

The following Attestations are related to the entity you wish to reaffirm their Attestation.
Note: If there are no Active Attestations for the scope of the PDS.

BULK REAFFIRMATION

UNIQUE ID	REGISTRATION
<input type="checkbox"/>	ATTESTATION ID
<input type="checkbox"/>	NAME

Attestation Reaffirmation Request ID <Value will be generated>

Select Attestations to be Reaffirmed

ATTESTATION ID	NAME
<input type="checkbox"/>	ATTESTATION ID
<input type="checkbox"/>	NAME

Reaffirmation Renewal Date

Reaffirm Renewal Date

Action

Instructions: To submit this attestation reaffirmation request, you must provide a comment.

Reaffirmation Request Comment

Action

Relate Existing

ACTIVE ATTESTATIONS

ATTESTATION ID	REGISTRATION	ATTESTATION SCOPE	EFFECTIVE DATE	RENEWAL DATE
<input type="checkbox"/>	AE / 281049	FAC-008-3 R6	04/19/2021	10/19/2021
<input type="checkbox"/>	AE / 281099	FAC-003-4	05/23/2021	05/23/2021
<input type="checkbox"/>	AE / 281070	NCR99999999 - Second Game Day Friday Entity in MRO	PRC-023-4 R5	05/24/2021

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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 Self-Certification Distribution

- 6 Select the **Reaffirm Renewal Date**.
- 7 Type any notes to the Registered Entity in the **textbox**.
- 8 Select **Submit** from the dropdown.
- 9 Click **Update**.

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Create Attestation Reaffirmation Request
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Attestation Reaffirmation Request ID <Value will be generated>

Select Attestations to be Reaffirmed by entities

<input type="checkbox"/>	ATTESTATION ID	NAME	REGISTRATION	STANDARD	REQUIREMENT	PART
This table is empty						

Reaffirmation Renewal Date

Reaffirm Renewal Date

Action

Instructions To submit this attestation, the registered entity select "submit" from drop down and then click update.

Reaffirmation Request Comment

Action

Update
Close

6

7

9

8



Attestations (Reaffirmation Approval)

To review attestations sent by the Registered Entity :

- 1 Navigate to the **Attestations** module.
- 2 Click **Review** next to the attestation you wish to review.
- 3 Select the **Renewal Date**.
- 4 Select **Approve or Disapprove** from the dropdown.
- 5 Type any **comments**. (Will be visible to the Entity)
- 6 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.



Attestations (Reaffirmation Approval)

To review multiple attestations sent by the Registered Entity:

1. Navigate to the **Attestations** module.
2. Click the **Bulk Review** button.
3. Click the **link icon**.
4. Check the **checkboxes** next to the attestations you wish to review.
5. Click **Confirm**.

The screenshot shows the 'My Align' sidebar menu with 'Attestations' highlighted (1). The main area shows the 'Attestations' module with a 'BULK REVIEW' button (2). A table of attestations is displayed with a 'link icon' (3) next to the row for 'AE / 281085'. The 'Relate Existing' dialog box is open, showing a table of attestations with checkboxes (4) next to 'AE / 281085' and 'AE / 281086'. The 'Confirm' button is highlighted (5).

CREATE	ATTESTATION ID	REGISTRATION	ATTESTATION SCOPE
<input type="checkbox"/>	review AE / 281058		CIP-002-5.1a R1.
<input type="checkbox"/>	review AE / 281072		FAC-003-4
<input type="checkbox"/>	review AE / 281076		FAC-003-4
<input checked="" type="checkbox"/>	review AE / 281085		FAC-003-4 R1.
<input checked="" type="checkbox"/>	review AE / 281086		BAL-001-2 R1.
<input type="checkbox"/>	review AE-281034		FAC-003-4

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.



Attestations (Reaffirmation Approval)

- 6 Select the **Renewal Date**.
- 7 Type any **comments**. (Will be visible to the Entity)
- 8 Select **Approve or Disapprove** from the dropdown.
- 9 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 Review
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Attestation Review ID <Value will be generated>

Select Attestations for Review

	APPLICABILITY...	NAME	REGISTRATION	STANDARD	REQUIREMENT	PART	NOTES
<input type="checkbox"/>	AE / 281085	AE / 281085	NCR9999999 - Second Game...		FAC-003-4 R1.		test
<input type="checkbox"/>	AE / 281086	AE / 281086	NCR9999999 - Second Game...		BAL-001-2 R1.		I don't like this

Review Response

Renewal Date

Attestation Review Comment

Attestation Review Conclusion

-- None --

Approve

Disapprove

6

7

8

9

Update
Close



Attestations (Reaffirmation Request)

To request an entity reaffirm an active attestation:

- 1 Navigate to the **Attestations** module.
- 2 Click the **Active Attestations** tab.
- 3 Click the **Request Reaffirmation** link.

My Align

- Self Cert Administration
- PNC Processing
- Enforcement Processing
- Mitigation Management
- CMEP Activity Search
- Entity Information
- Technical Feasibility Exception
- Attestations**
- Report Management
- Reports

Attestations

Attestations in Review | **Active Attestations** | Inactive Attestations

BULK REAFFIRMATION

ACTIVE ATTESTATIONS

UNIQUE ID	REGISTRATION	APPLICABLE TO	EFFECTIVE DATE	RENEWAL DATE	ACTION
AE / 281049		FAC-008-3 R6	04/19/2021	10/19/2021	REQUEST REAFFIRMATION
AE / 281069		FAC-003-4	05/23/2021	05/23/2022	REQUEST REAFFIRMATION
AE / 281070	NCR9999999 - Second Game Day Friday Entity in MRO	PRC-023-4 R5	05/24/2021	05/24/2022	REQUEST REAFFIRMATION
AE / 281075	NCR9999999 - Second Game Day Friday Entity in MRO	FAC-003-4	06/02/2021	06/08/2022	REQUEST REAFFIRMATION
AE / 281084		FAC-003-4	06/08/2021	06/15/2022	REQUEST REAFFIRMATION

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REQUESTED REAFFIRMATIONS

UNIQUE ID	REGISTRATION	APPLICABLE TO	RENEWAL DATE	REAFFIRM RENEWAL DATE
AE / 281042		PRC-023-4 R5	10/07/2021	04/22/2021
AE-281033		FAC-003-4	10/19/2021	06/18/2021
AE / 281041		TPL-001-4	10/12/2021	06/18/2021

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INSTRUCTIONS

The Attestations in the top pane have been previously approved and are active. You may issue requests to Registered Entities asking that their validity be reaffirmed. There are two ways to do this.

- To issue each reaffirmation request individually, click **REQUEST REAFFIRMATION** on the right for each specific Attestation.
- To request multiple reaffirmations, click **BULK REAFFIRMATION** at the top of the screen, and follow the instructions.

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.



Attestations (Reaffirmation Request)

- 4 Select the **Reaffirm Renewal Date**.
- 5 Type any **comments**. (Will be visible to the Entity)
- 6 Select **Submit** from the **dropdown**.
- 7 Click **Update**.

Notice: The renewal of the Active Attestation will now appear in the **Requested Reaffirmations** section shown on the previous slide.

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.



Sending a Self-Certification Distribution

To send the Self-Certification request(s) to identified Registered Entities:

- 1 Click the **Request ID** on the **Create Distribution** tab.
- 2 Navigate to the **Action** tab.
- 3 Select **Submit** from the dropdown.
- 4 Click **Update**.

Notice: The Self-Certification request(s) will now appear in the **Active Self-Certs** tab or the **Scheduled Self-Certs** tab if the Start Date occurs in the future

The screenshot shows the 'Self Certifications' interface. At the top, there are tabs for 'Create Distribution', 'Scheduled Self-Certs', 'Active Self-Certs', 'Self-Certs in Review', 'Completed Self-Certs', 'Processed Distributions', and 'ARE Self-Certs'. Below these are three sub-tabs: 'CREATE ENTITY DISTRIBUTION', 'CREATE FUNCTION DISTRIBUTION', and 'CREATE REQ DISTRIBUTION'. The main area displays a table of self-certification requests with columns for 'REQUEST ID' and 'RE NA'. A modal window titled 'Test 6-4 EM' is open, showing tabs for 'General', 'Requirement, Function, and Entity Selection', 'Distribution and Question Preview', 'Attestations', and 'Action'. The 'Action' tab is selected, showing a dropdown menu with options: 'Submit', '-- None --', 'No Action', and 'Submit'. The 'Update' button is highlighted in green at the bottom of the modal.





Requests for Extensions

An entity may submit a Request for Extension (RFE) for the Self-Cert. RFEs appear on the My Align dashboard and can be accessed from the Self-Cert 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 **RFEs** tab in the **Self-Certifications** module (B).
- 2 Click the **RFE Unique ID** to open the RFE for review.

My Align | Dashboard and Tasks | Assigned To Me | NEWS AND UPDATES | MRO Editor 1

Self-Certifications | Create Distribution | Scheduled | Active | In Review | Completed | Processed Distributions | ARE Self-Certs | **RFEs**

ITEMS AWAITING MY REVIEW

TYPE	UNIQUE ID
RFE for PDS	Test 5-21 RFE-000122
RFE for PDS	Test 5-21 RFE-000121
RFE for PDS	RFE Test EM 5-24 RFE-000123
RFE for SelfCerts	Test 3 EM 518 RFE-000140
RFE for SelfCerts	FAC-008 SC test RFE-000076
RFE for SelfCerts	Andy Test RFE-000081

RFE ID	SELF CERT ID	REGISTRATION	ORIGINAL DUE DATE	REQUESTED DUE DATE	NEW DUE DATE	STATUS
RFE-000012	SC2021-000025	NCR55555 - Test Entity Name Change in WECC	09/01/2021	09/10/2021	09/10/2021	Approved
RFE-000013	SC2021-000030	NCR55555 - Test Entity Name Change in WECC	09/01/2021	09/10/2021	09/10/2021	Approved
RFE-000015	SC2021-000037	NCR55555 - Test Entity Name Change in WECC	09/01/2021	09/10/2021	09/10/2021	Approved
RFE-000019	SC2021-000040		08/09/2021	08/31/2021	08/31/2021	Approved
RFE-000020	SC2021-000040		08/31/2021	09/10/2021	09/10/2021	Disapproved
RFE-000021	SC2021-000051	NCR55555 - Test Entity Name Change in WECC	09/01/2021	09/10/2021	09/10/2021	Approved
RFE-000022	SC2021-000058	NCR55555 - Test Entity Name Change in WECC	09/01/2021	09/08/2021	09/08/2021	Approved
RFE-000034	SC2021-000138		09/17/2021	09/30/2021	09/30/2021	Approved
RFE-000039	SC2021-000185	NCR55555 - Test Entity Name Change in WECC	10/31/2021	11/30/2021	11/30/2021	Requested
RFE-000041	SC2021-000186	NCR55555 - Test Entity Name Change in WECC	11/30/2021	11/30/2021	11/30/2021	Requested

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Requests for Extensions

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

If you selected Approved:

4 Select the **New Due Date** for the Self-Cert.

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**.

Notice: If you select Disapproved, the Entity will need to resubmit the request.

SC2021-000189 | RFE-000043
✕

Request for Extension

Registration	NCR55555 - Test Entity Name Change in WECC
Parent Source	SC2021-000189
Standard / Requirement /Parts	CIP-003-8 R2.; PRC-005-6 R1.
Original Due Date	November 30, 2021
Requested Due Date*	December 1, 2021
Reason for Extension*	Reason

Approval of Request for Extension

Status	<div style="border: 1px solid #ccc; padding: 2px;"> Approved ▼ </div> <div style="border: 1px solid #ccc; margin-top: 2px; padding: 2px;"> Requested -- None -- Approved Disapproved Requested </div>
New Due Date	<div style="border: 1px solid #ccc; padding: 2px;"> 12/01/2021 📅 </div>
Approval Decision Comment	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

Update
Close

Approval of Request for Extension

Status	<div style="border: 1px solid #ccc; padding: 2px;"> Disapproved </div>
Approval Decision Comment	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

Update
Close





Reviewing a Self-Certification Response

To view entities' Self-Cert responses submitted for CEA review:

- 1 Navigate to the **In Review** tab.
- 2 Open the **Unique ID** you wish to review.
- 3 In the **Self-Cert Assessments** section, click the **hyperlink** to open the entity's responses.
- 4 **Review** the entity's responses, including answers.

The screenshot shows the 'Self-Certifications' application interface. At the top, there is a navigation bar with the 'In Review' tab selected and highlighted with a circled '1'. Below the navigation bar is a table titled 'SELF-CERT SUBMITTALS AWAITING CEA REVIEW'. The table has columns for 'UNIQUE ID', 'REGISTRATION', 'CEA POC', 'SHORT NAME', 'STANDARD(S) AND REQUIREMENT(S)', 'MONITORING PERIOD', and 'SUBMITTAL DATE'. One row is highlighted with a circled '2', showing 'SC2021-000142' for the Unique ID and 'NCR5555 - Test Entity Name Change in WECC' for the Registration. To the right of the table, a pop-up window displays details for the selected submittal, including 'Entity' and 'Section'. Below this, a 'Self-Cert Assessment' section is visible, containing a table of 'QUESTIONS' with columns for 'REQUIREMENT (PART)' and 'ANSWER'. A circled '3' highlights a hyperlink in the requirement column. A modal dialog box is open over the assessment, with a circled '4' highlighting the text 'Please indicate your response for this requirement: Compliant' and 'Please provide any comments you might have related to this Requirement here: Delegate Section No'. A 'Close' button is visible at the bottom of the modal.



Reviewing a Self-Certification Response

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**.

The screenshot shows the 'Self-Cert Assessments' interface. At the top, there is a table with columns: REQUIREMENT (PART), ANSWERED BY, ANSWER, REVIEW NOTE, and REVISE. The first row shows requirement 'CIP-002-5.1a R1.' with a 'Compliant' answer and a '+' icon in the REVIEW NOTE column. A yellow circle with the number '5' is placed over the '+' icon, and a tooltip points to it with the text 'Click here to mark this item for Entity revision'. Below the table, a 'Create Session Revision Flag' dialog box is open. It contains a 'Session' field with the text 'SC2021-000142 - NCR55555 - Test Entity Name Change in WECC - CIP-002-5.1a R1. - NCR55555 Test Company in WECC Editor 1 (Sep 16, 2021, 7:57:38 PM)'. Below this is a 'Note' field with a yellow circle and the number '6' over it. At the bottom of the dialog, there are 'Update' and 'Close' buttons, with a yellow circle and the number '7' over the 'Update' button.



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**.

Notice: You must have an Applicable Standard/Requirement/Part (A) filled in to be able to submit the RFI.

- 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 not appear on your My Align dashboard but will appear in the RFI section of the Self-Cert. In addition, RFIs can be submitted at any time after distribution. RFIs should be placed in Completed status prior to Completing the Self-Cert Review.





Review Notes

To create a Review Note for a Self-Certification and capture fieldwork details:

1. Navigate to the **In Review** tab.
2. Click the **Unique ID** to open the desired Self-Cert.
3. In the **Self-Cert Assessments** section, click the **plus icon** next to the applicable requirement.

The screenshot shows the 'Self-Certifications' interface. The 'In Review' tab is selected. A table lists self-certifications with columns for Unique ID, Registration, CEA POC, Short Name, Standard(s) and Requirement(s), Monitoring Period, and Submittal Date. The first row is selected. A modal window titled 'Test 1 EM 518' is open, showing 'Self-Cert Submitted On: May 19, 2021' and a 'Self-Cert Assessments' section. Under 'COMPLETED ASSESSMENT SESSIONS', there is a table with columns for Requirement (Part), Answer, Create Review Note, and Edit/View Review Note. The first row shows 'BAL-001-2 R1. for VERSION 0' with a 'Compliant' answer and a plus icon next to it.

UNIQUE ID	REGISTRATION	CEA POC	SHORT NAME	STANDARD(S) AND REQUIREMENT(S)	MONITORING PERIOD	SUBMITTAL DATE
SC2021-000136	CR55555 - Test Entity Name Change in WECC		8/11_Demo_SC	PRC-005-6 R3, CIP-003-8 R2, PRC-019-2 R1., CIP-002-5.1a R1.	01/01/2020 - 12/31/2020	Aug 26, 2021
SC2021-000142	NCR55555 - Test Entity Name Change in WECC		8/17_Demo1_DC	PRC-005-6 R1., CIP-002-5.1a R1., CIP-002-5.1a R2.	01/01/2020 - 12/31/2020	Sep 16, 2021

REQUIREMENT (PART)	ANSWER	CREATE REVIEW NOTE	EDIT/VIEW REVIEW NOTE
BAL-001-2 R1. for VERSION 0	Compliant	+	

Notice: Self-Cert **Review Notes** will not be visible to the entity. Adding Review Notes is not required to complete and close the Self-Cert.



Review Notes

4 Select your **Review Response** from the **dropdown**.

5 Type any **comments** related to the review completed.

6 Click **Update**.

If you wish to edit your Review Note after creating, click the **Edit** link (A) in the Self-Cert Assessment section to resume updating Review Notes.

Notice: Review Notes are not visible to the Registered Entity.

Review Note

Self Assessment Response

Related Self-Cert	Test 1 EM 518
Registration	NCR9999999 - Second Game Day Friday Entity in MRO
Requirement	BAL-001-2 R1.
Entity Response	Not reviewed

Self Assessment Response

Review Response	In review	
Review Comment	test	

In review|
In review|
-- None --

- Closed with no PNC
- Closed with PNC
- In review
- Not reviewed

Update
Close

Self-Cert Assessments

COMPLETED ASSESSMENT SESSIONS

REQUIREMENT (PART)	ANSWER	CREATE REVIEW NOTE	EDIT/VIEW REVIEW NOTE
BAL-001-2 R1. for VERSION 0	Compliant	[+]	A Edit



Review Comments

The **Review Comments** section of the Self-Cert is used to document the CEA reviewer, region comments and response for the overall Self-Cert (summary for all requirement(s) included in the Self-Certification) as well as confirm sending notification to the entity when ready.

Text written into the **Region Comment** field will be visible to the entity when they open the Self-Cert in Align.

When the review is completed and **Region Response** is marked Closed, CEAs should ensure “**Send Notification of answer to entity**” is marked yes.

Test 1 EM 518

Review Comments

Assigned Reviewer: [Dropdown]

Region comment: [Text Area]

Region Response: [Dropdown - In review]

Send Notification of answer to entity?: [Dropdown]

Additional Questions

Findings

Request for Extension

[Update] [Close]



Review Comments

To update **Review Comments** on a Self-Certification:

- 1 Navigate to the **In Review** tab.
- 2 Click the **Unique ID** to open the Self-Cert.
- 3 Scroll to the **Review Comments** section.

The screenshot shows the 'Self-Certifications' dashboard. The 'In Review' tab is selected. A table lists self-certifications with columns for Unique ID, Registration, CEA POC, Short Name, Standard(s) and Requirement(s), Monitoring Period, and Submittal Date. The entry SC2021-000183 is selected. A modal window titled 'Review Comments' is open, showing the 'Assigned Reviewer' dropdown, a rich text editor for 'Region comment', and a 'Region Response' dropdown set to 'In review'. A red warning message states: 'Ensure any Draft Findings created by the CEA are submitted before closure of the Self-Cert. Draft Findings should be submitted from the Findings dashboard.' Below the modal, there are sections for 'Additional Questions', 'Findings', 'Request an Extension', and 'Request for Information'. At the bottom of the modal are 'Update' and 'Close' buttons.



Review Comments

4 Click in the **Assigned Reviewer** field and select reviewer from the dropdown.

Notice: For easier selection, you can also type the name (A) of the reviewer in this field to filter the list of results. Ensure correct name is selected, as this list will currently display entity users as well.

SC2021-000183

Review Comments

4 Assigned Reviewer

Region comment

Region Response: In review

Assigned Reviewer: WECC E

Region comment: -- None --

Region Response: WECC Editor 1

WECC Editor 2

WECC Editor 3

WECC Editor 4

WECC Editor 5

WECC Editor 6

Update Close



Review Comments

5 Use the **Region Comment** field to provide any comments to the entity specific to the state of the review (**Region Response** field). Text entered in this field is visible to the entity.

When closing the Self-Cert, this field should be used to summarize the closure for notification to the entity.

6 Select the **Region Response** from the **dropdown**. Options are:
Closed with no PNC
Closed with PNC
In Review
Not Reviewed

Notice: When closing the Self-Cert “with PNC” or “with no PNC”, if any requirement(s) in scope of the Self-Cert activity resulted in Non-Compliant (entity or CEA determination), “Closed with PNC” should be selected for **Region Response** status.



Review Comments

7 Select **Yes or No** for “Send Notification of answer to entity?” using the **dropdown**.

If you select **Yes**, type the response for notification (A) to the entity in the provided textbox. This text is included in the email notification.

If you select **No**, a notification will not be sent to the entity. The entity will not receive an automatic notification of review completed.

Notice: When closing the Self-Cert “with PNC”, if any requirement(s) in scope of the Self-Cert activity resulted in Non-Compliant identified by the CEA, ensure Draft Findings are created and submitted (from **Findings** module) before closure of the Self-Cert to ensure preliminary screening occurs with required Rules of Procedure timelines.

8 Click **Update**.

SC2021-000183

Review Comments

Assigned Reviewer: WECC Editor 1

Region comment: The responses to this Self-Certification have been reviewed and will be closed with no PNC based on review.

Region Response: Closed with no PNC

Ensure any Draft Findings created by the CEA are submitted before closure of the Self-Cert. Draft Findings should be submitted from the Findings dashboard.

7 Send Notification of answer to entity? Yes

Notification content of answer to entity: This Self-Certification review is completed and closed. Please refer to Align for additional information, including specifics on provided Related Issues.

A

Additional Questions

8 Update Close



Reviewing Additional Question Responses

If Additional Questions were included in the Self-Certification activity, entity responses should be reviewed.

- 1 Scroll to the **Additional Questions** section of the Self-Cert.
- 2 Review the answers to any additional questions included.

Short Name	
Additional Questions	
QUESTION	ANSWER
What is your favorite color?	Green

Findings

Request for Extension

Requests for Information

Notice: Additional Questions are added through the **Self-Certification Administration** module. Additional details for custom questions will be included in future user guide revisions.



Related Findings

Any Findings related to the scope of the Self-Cert can be reviewed through the Findings section of the Self-Cert record. The **Related Findings** portlet will display the Align ID, requirement, status, start date, and monitoring method.

To locate:

- 1 Scroll to the **Findings** section and click to expand.
- 2 Click on any ID, if any, to see further details about the finding.

Notice: If the entity replied to any Self-Cert Assessments as Non-Compliant but a related Finding cannot be identified, such as one identified with "Self-Certification" as the monitoring method (A), region staff should follow up with the entity to confirm Finding record(s) exist.

SC2021-000189

Findings 1

Note: The red flag indicates there is an Active Attestation

CREATE FINDING

REGISTRATION	REQUIREMENT	CREATE FINDING
NCR55555 - Test Entity Name Change in WECC	PRC-005-6 R1.	+
NCR55555 - Test Entity Name Change in WECC	CIP-003-8 R2.	+

RELATED FINDINGS

ID	REGISTRATION	REQUIREMENT	STATUS	START ...	MONIT...
[Redacted]	NCR55555 - Test Entity Name...	CIP-003-8 R2.	Processing Complete	08/24/2020	Self-Report
[Redacted]	NCR55555 - Test Entity Name...	PRC-005-6 R1.	Processing Complete		Self-Certification
[Redacted]	NCR55555 - Test Entity Name...	CIP-003-8 R2.	Processing Complete	02/24/2021	Self-Report
[Redacted]	NCR55555 - Test Entity Name...	CIP-003-8 R2.	Processing Complete		Self-Certification
[Redacted]	NCR55555 - Test Entity Name...	CIP-003-8 R2.	PNC Review		Self-Certification

Page 1 of 1
Page 1 of 1

[Request an Extension](#)

[Request for Information](#)



Creating a Finding

To create a Finding related to the Self-Certification:

- 1 Navigate to the **In Review** tab.
- 2 Click the **Unique ID** to open the Self-Cert.
- 3 Click to expand the **Findings** section.
- 4 Locate the relevant requirement and click the **plus icon**.

The screenshot shows the 'Self-Certifications' interface. The 'In Review' tab is selected. A table lists self-certifications with columns for Unique ID, Registration, CEA POC, Short Name, Standard(s) and Requirement(s), Monitoring Period, and Submittal Date. A modal window titled 'Test 1 EM 518' is open, showing the 'Findings' section. It contains a 'CREATE FINDING' table with columns for Registration, Requirement, and a plus icon. A 'RELATED FINDINGS' table is also visible below it.

UNIQUE ID	REGISTRATION	CEA POC	SHORT NAME	STANDARD(S) AND REQUIREMENT(S)	MONITORING PERIOD	SUBMITTAL DATE
SC2021-000136	NCR55555 - Test Entity Name Change in WECC		8/11_Demo_SC	PRC-005-6 R3, CIP-003-8 R2, PRC-019-2 R1., CIP-002-5.1a R1.	01/01/2020 - 12/31/2020	Aug 26, 2021
SC2021-000142	NCR55555 - Test Entity Name Change in WECC		8/17_Demo1_DC	PRC-005-6 R1., CIP-002-5.1a R1., CIP-002-5.1a R2.	01/01/2020 - 12/31/2020	Sep 16, 2021
SC2021-000183	NCR55555 - Test Entity Name Change in WECC					
SC2021-000185	NCR55555 - Test Entity Name Change in WECC					
SC2021-000189	NCR55555 - Test Entity Name Change in WECC					

REGISTRATION	REQUIREMENT	CREATE FINDING	ID	REGISTRATION	REQUIREMENT
NCR9999999 - Second Game Day Friday Entity in MRO	BAL-001-2 R1.	+			



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 Self-Cert, but the CEA will need to **submit** the draft from the **Findings** module in Align.

Ensure any changes to the Self-Cert 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

5 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	Self-Certification

General Information

Registration	NCR55555 - Test Entity Name Change in WECC	
Entity in Coordinated Oversight	No	Region – Jurisdiction in which the Potential Noncompliance occurred <input style="width: 100%;" type="text" value="WECC-US"/>
Applicable Requirement	PRC-005-6 R1.	
Applicable Part(s)	<input style="width: 100%;" type="text" value="PRC-005-6 R1.1. ✕ PRC-005-6 R1.2. ✕"/>	
Applicable Reliability Function(s)	<input style="width: 100%;" type="text" value="BA ✕ GO ✕"/>	
	Other Region – Jurisdiction(s) where you are reporting this Potential Noncompliance	<input style="width: 100%;" type="text"/>

Discovery and Description

When was the Potential Noncompliance discovered? *	<input style="width: 100%;" type="text"/>	When did the Potential Noncompliance start? *	<input style="width: 100%;" type="text"/>
How was this Potential Noncompliance	<input style="width: 100%;" type="text"/>	What is the basis for your selecting this start date? *	<input style="width: 100%;" type="text"/>

Save
Close

6

[Home](#) |
 [Previous Page](#) |
 [Next Page](#)



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.

The screenshot shows the 'Findings' module interface. A dropdown menu is open, showing options like 'My Align', 'Findings', 'Periodic Data Submittals', etc. A table of 'DRAFT FINDINGS' is visible with columns for 'MONITORING METHOD', 'UNIQUE ID', 'NCR', and 'ENTITY'. A modal window titled '2021-00118' is open, showing sections for 'Please provide any additional comments', 'Evidence', and 'Action'. A dropdown menu in the 'Action' section is open, showing 'Submit', 'No Action', 'Delete', and 'Submit'. At the bottom of the modal, there are buttons for 'Save and Action', 'Save', and 'Close'.



Related Issues

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

1. Navigate to the **In Review** tab.
2. Click the **Unique ID** to open the Self-Cert.
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.

The screenshot shows the 'Self-Certifications' application interface. At the top, there are navigation tabs: 'Create Distribution', 'Scheduled', 'Active', 'In Review' (highlighted with a '1'), 'Completed', 'Processed Distributions', 'ARE Self-Certs', 'RFIs', and 'RFEs'. Below the tabs is a table titled 'SELF-CERT SUBMITTALS AWAITING GEA REVIEW'. The table has columns: 'UNIQUE ID', 'REGISTRATION', 'CEA POC', 'SHORT NAME', 'STANDARD(S) AND REQUIREMENT(S)', 'MONITORING PERIOD', and 'SUBMITTAL DATE'. One row is highlighted with a '2' over the 'UNIQUE ID' 'SC2021-000136'. Below the table, a detailed view for 'SC2021-000448' is shown. It includes a 'Related Issues' section with a '3' over the title and three plus icons labeled '4A', '4B', and '4C' for adding new issue types. Below this is a table with columns: 'PARENT NAME', 'ISSUE TYPE', 'ISSUE ID', and 'REGISTRATION'. At the bottom, there is an 'EVIDENCE' section.



Related Issues

5 Fill out the information related to the Issue for the Self-Cert.

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 Self-Cert Review. All issues must be completed prior to completing the Self-Cert.

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



Completing a Self-Certification Review

If you have completed your review and are ready to close the Self-Cert:

- 1 Ensure **Review Comments** section is updated and **Region Response** per region processes. If closed with PNC, ensure related Finding(s) exist. Also ensure a notification is sent to the entity with completion.
- 2 Scroll to the **Action** section, select **Review Completed** from the dropdown.
- 3 Click **Update**.

SC2021-000183

1
Review Comments

Assigned Reviewer: WECC Editor 1

Region comment: The responses to this Self-Certification have been reviewed and will be closed with no PNC based on review.

Region Response: Closed with no PNC

Ensure any Draft Findings created by the CEA are submitted before closure of the Self-Cert. Draft Findings should be submitted from the Findings dashboard.

Send Notification of answer to entity?: Yes

Notification content of answer to entity: This Self-Certification review is completed and closed. Please refer to Align for additional information, including specifics on provided Related Issues.

Region Attachments

Attachments [Attach file](#)

2
Action

Instructions: When Review and Approval have been completed, this Self Certification can be completed by selecting the "Review Completed" Action option and clicking "Update" below.

Action: Review C Review Completed -- None -- Reopen No Action Review Completed

Update

3



Reopening a Self-Certification

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

To reopen a completed Self-Cert:

1. Navigate to the **In Review** or **Completed** tab.
2. Click the **Unique ID** to open the Self-Cert.
3. Scroll to the **Action Section**.

The screenshot shows the 'Self-Certifications' application interface. At the top, there are navigation tabs: 'Create Distribution', 'Scheduled', 'Active', 'In Review' (highlighted with a yellow circle '1'), and 'Completed'. Below the tabs is a table of 'SELF-CERT SUBMITTALS'. The table has columns for 'UNIQUE ID', 'REGISTRATION', 'CEA POC', 'SHORT NAME', 'STANDARD(S) AND REQUIREMENT(S)', 'MONITORING PERIOD', and 'SUBMITTAL DATE'. One row is highlighted with a yellow circle '2' around the 'UNIQUE ID' 'SC2021-000185'. Below the table, there is a detailed view of a self-certification titled 'Test 1 EM 518'. This view includes sections for 'Evidence' and 'Region Attachments'. At the bottom of this view, there is an 'Action' section with a dropdown menu set to 'Reopen' (highlighted with a yellow circle '3'). There are 'Update' and 'Close' buttons at the bottom of the detailed view.



Reopening a Self-Certification

- 4 Click the **Action** section to expand it.
- 5 Select **Reopen** from the dropdown.
- 6 Click **Update**.

By reopening the Self-Cert, it will be sent back to the **Active** tab, and the entity will be able to edit its response.

Test 1 EM 518 ✕

	RFI ID	REQUESTOR CONTACT	RESPONDENT CONTACT	RESPONSE DUE BY
+	This table is empty			

Evidence

Secure Evidence Locker Instructions Submit Evidence or Attachments related to this Self-Cert via [ERO Secure Evidence Locker \(SEL\)](#) with the following reference number:
MRO|NCR9999999|VITest 1 EM 518|VITest 1 EM 518|BAL-001-2|R1.1.
 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

Instructions When Review and Approval have been completed, this Self Certification can be completed by selecting the "Review Completed" Action option and clicking "Update" below.

Action

4
5

6

Update
Close

Notice: The entity will not receive an email notification that the Self-Certification has been reopened. The CEA will need to contact the entity prior to reopening.



Cancelling a Self-Certification

To cancel a Self-Certification request that was previously scheduled or sent to an entity:

- 1 Navigate to the **Active** or **Scheduled** tab.
- 2 Click the **Unique ID** to open the Self-Cert.
- 3 Click the **Edit** button.
- 4 Click **Action (Optional - Click to Expand)** and then select **Cancel** from the dropdown.
- 5 Click **Update**.

Notice: The Self-Cert will now appear in the Completed Self-Certs section with a status of Cancelled. A Self-Cert request can only be canceled if it is in Active or Scheduled Status. To cancel a Self-Cert in Review, the user must reopen it to send it back to Active Status and then follow the steps to cancel.

The screenshot shows the 'Self-Certifications' interface. At the top, there are tabs for 'Active', 'In Review', and 'Completed'. The 'Active' tab is selected. Below the tabs is a table of 'SELF-CERT REQUESTS ACTIVE IN REGISTERED ENTITY PROCESSING'. The table has columns for 'UNIQUE ID', 'REGISTRATION', 'CEA POC', 'SHORT NAME', 'STANDARD(S) AND REQUIREMENT(S)', 'PROGRESS', and 'DUE DA...'. Two rows are visible, both with 'NCR55555 - Test Entity Name Change in WECC' as the registration. The first row has 'SC2021-00006' as the unique ID and '1/12 COMPLETED' progress. The second row has 'SC2022-00004' as the unique ID and '5/55 COMPLETED' progress. Below the table, there is a modal window titled 'Action (Optional - Click to Expand)'. The modal contains 'Instructions' and 'Action' sections. The 'Action' section has a dropdown menu with options: 'Cancel', '-- None --', 'Cancel', and 'No Action'. The 'Cancel' option is selected. At the bottom of the modal, there are 'Update' and 'Close' buttons.





Self-Certification Templates (Create)

Previous Self-Cert Distributions can be used to create templates for Self-Cert Distributions.

To create a template from a previous distribution:

- 1 From the Self-Certification module, navigate to the **Processed Distributions** tab.
- 2 Click the **plus icon** next to the Self-Cert distribution you wish to use for creating a template.

Self-Certifications
Align for Regions

Create Distribution |
 Scheduled |
 Active |
 In Review |
 Completed |
 1 **Processed Distributions** |
 PRE Self-Certs |
 RFIs |
 RFEs

SELF-CERTIFICATIONS - PROCESSED BULK DISTRIBUTIONS						
DISTRIBUTION ID	STANDARD(S) AND REQUIREMENT(S)	MONITORING PERIOD	VISIBILITY DATE	START DATE	SHORT NAME	CA_INSTRUCTIONS
2 + 2021-000001	PRC-024-2 R1., CIP-002-5.1a R1., PRC-023-4 R1., PRC-025-2 R1., CIP-003-8	01/01/2020 - 12/31/2020	06/23/2021	06/23/2021		
+ 2021-000002	PRC-004-6 R1., CIP-002-5.1a R1.	01/01/2020 - 12/31/2020	06/23/2021	06/23/2021		
+ DS2021-000003	CIP-002-5.1a R1.	01/01/2020 - 12/31/2020	06/24/2021	06/24/2021		
+ DS2021-000005	CIP-002-5.1a R1., CIP-004-6 R5., CIP-003-8 R4.	01/01/2020 - 12/31/2020	06/24/2021	06/24/2021		
+ DS2021-000006	CIP-004-6 R1.	06/01/2021 - 06/04/2021	06/24/2021	06/24/2021		
+ DS2021-000009	CIP-004-6 R1.	06/01/2021 - 06/04/2021	06/24/2021	06/24/2021		
+ DS2021-000010	CIP-003-8 R1.	06/24/2021 - 06/24/2021	06/24/2021	06/24/2021	TRAINING TEST	
+ DS2021-000011	CIP-004-6 R2.	06/01/2021 - 06/04/2021	06/24/2021	06/24/2021		
+ DS2021-000020	TOP-003-4 R5., CIP-010-3 R1., COM-002-4 R4.	01/01/2020 - 12/31/2020	06/30/2021	06/30/2021		
+ DS2021-000021	CIP-010-3 R1., TOP-003-4 R5., COM-002-4 R4.	01/01/2020 - 12/31/2020	06/30/2021	06/30/2021		
+ DS2021-000022	FAC-008-3 R1., CIP-002-5.1a R1., VAR-	01/01/2020 -	06/30/2021	06/30/2021		

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INSTRUCTIONS

The Distributions above have been used to generate Self-Certs in bulk in the past. Clicking the "plus" will allow you to clone another Distribution form the one selected. Previous distributions marked as "Favorite Templates" are shown with a red ribbon.



Self-Certification Templates

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

4 Update instructions for this distribution in the field labeled **Instructions to entity**.

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 Self-Cert template you just created will now appear under the **Create Distribution** tab (A).

Create Self-Certification Distribution ✕

General

3 Compliance Year: 2024

Visibility Monitoring Period Start: 01/01/2024

Start Date Monitoring Period End: 12/31/2024

Due Date

Instructions to entity

Paragraph | Helvetica Neue | 14px

B I U | Timestamp

This is a test template creation. Instructions to entity go here.

Mark as Favorite/Template

Compliance Enforcement Authority: WECC

Point of Contact

5 Update Close

Self-Certifications
▼

Create Distribution
Scheduled
Active
In Review
Co

CREATE FUNCTION DISTRIBUTION
CREATE REQ DISTRIBUTION
CREATE

SELF-CERTIFICATION - BULK DISTRIBUTIONS IN DRAFT

	REQUEST ID	REQUEST NAME	FUNCTIONS
+	DS2024-000041	This is a 2024 Test Template	GO
-	DS2024-000040		
-	DS2024-000025		



Self-Certification Templates (Favorite)

To mark a particular Self-Cert distribution as a favorite:

- 1 From the Self-Certifications module, navigate to the **Processed Distributions** tab.
- 2 Click the **plus icon** next to the Self-Cert distribution you wish to mark as a favorite for templates.
- 3 Populate **General** information per previous page of instructions.
- 4 Select the **checkbox** next to **Mark as Favorite/Template**.
- 5 Click **Update**.

Notice: Once the draft distribution is processed, it will display with a ribbon icon next to it (A) and appear at the top of the **Processed Distributions** tab's list for future use.

The screenshot shows the 'Self-Certifications' application interface. At the top, there is a navigation bar with various tabs: 'Create Distribution', 'Scheduled', 'Active', 'In Review', 'Completed', 'Processed Distributions', 'ARE Self-Certs', 'RFIs', and 'RFES'. The 'Processed Distributions' tab is selected and highlighted with a yellow circle '1'. Below this is a table titled 'SELF-CERTIFICATIONS - PROCESSED BULK DISTRIBUTIONS' with columns for 'DISTRIBUTION ID', 'STANDARD(S) AND REQUIREMENT(S)', 'MONITORING PERIOD', 'VISIBILITY DATE', 'START DATE', 'SHORT NAME', and 'CA_INSTRUCTIONS'. A plus icon next to the first row is circled with a yellow circle '2'. A modal window titled 'Create Self-Certification Distribution' is open, showing a 'General' section with fields for 'Name *', 'Compliance Year', 'Visibility Date *', 'Monitoring Period Start *', 'Start Date *', and 'Monitoring Period End *'. A yellow circle '3' highlights the 'Name' field. Below the form, there is a checkbox for 'Mark as Favorite/Template' which is checked, circled with a yellow circle '4'. At the bottom of the modal, there is an 'Update' button circled with a yellow circle '5'. In the background, another instance of the 'Processed Distributions' table is visible, with a ribbon icon 'A' next to a distribution ID 'DS2024-00...', circled with a yellow circle '4'.



Self-Certification Administration

Regions can create specific custom questions to augment Self-Certification activities using the **Self-Cert Administration** module.

When region users are drafting potential custom questions for Self-Certs, please ensure the Align Training environment is used to test prior to creating in production. This ensures any configuration issues are identified and resolved before questions are used with an active Self-Cert distribution.

Notice: Additional instructions for custom questions will be added in future user guide revisions to detail nuances and lessons learned through CMEP activities.

☰ Self Cert Administration

📖 Self-Cert Library

REGION QUESTION LIBRARY INSTRUCTIONS

From here, you can create region-specific questions to augment those defined for the entire ERO. To begin, create a **New Question Group** and select the subject type (whether it applies to Requirements or Parts) and then the subjects (i.e., specific requirements/parts) to which it should apply. Then select "Update."

Refresh the top table on the left to see the created question Group. Click on **Assessment Type Missing** and choose the following options:

Negate	<i>do not use this field</i>
Assessment Attribute	Assessmentdefinition Assessmenttype
Operation Value	=
Value	Self-Certification <your Region>

Add Questions to the Question Group by clicking on the **Add Question** link. Clicking on a Question Group will filter the Questions below.

SELF CERT ADMINISTRATION - CUSTOM REGION QUESTION GROUPS

	GROUP NAME	APPLICABLE SUBJECTS
<input type="checkbox"/>		

Page 0 of 0

SELF CERT ADMINISTRATION - CUSTOM REGION QUESTIONS

	APPLICABLE TO	QUESTION PREVIEW	TYPE	QUESTION GROUP
<input type="checkbox"/>				

Page 0 of 0



Self-Certification Administration

To add a custom question:

- 1 Navigate to the **Self Cert Administration** module.
- 2 Click the **New Question Group** link.
- 3 The **New Question Template** window will open for next steps.

The screenshot shows the 'Self Cert Administration' module interface. On the left, a navigation menu is open with 'Self Cert Administration' highlighted, marked with a circled '1'. The main content area displays 'REGION QUESTION LIBRARY INSTRUCTIONS' and 'SELF CERT ADMINISTRATION - CUSTOM REGION QUESTION GROUPS'. A table with columns 'GROUP NAME' and 'APPLICABLE SUBJECTS' is visible. A 'New Question Template' window is open in the foreground, with the 'New Question Group' link highlighted in the instructions, marked with a circled '2'. The form includes fields for Name, Category, Description, Subject Type, and various checkboxes and dropdowns. At the bottom right of the form are 'Update' and 'Cancel' buttons. A 'Page 1' indicator is at the bottom left of the form.



Self-Certification Administration

- 4 Enter a **name** for the Question Group.
- 5 Select **Self Cert** from the Category dropdown.
- 6 Add a **Description** of the Question Group.
- 7 Select either **Part** or **Requirement** as the Subject Type.

New Question Template

Name * :

Category * :

Description:

Subject Type:

Has Specific Subjects:

Subjects:

Disable Approve/Reject in Multi-step Assessment:

DWH Table Name:

Update Cancel



Self-Certification Administration

- 8 Leave the **Has Specific Subjects** field as Yes.
- 9 Click the **Ellipsis (...)** button.
- 10 Check the **boxes** next to the parts or requirements you want to create a set of questions for.
- 11 Click the **OK** button.

New Question Template

Name * :

Category * :

Description:

Subject Type:

Has Specific Subjects: Yes No

Subjects:

Disable Approve/Reject in Multi-step Assessment:

DWH Table Name:

Requirement

Yes

No

Selector: Subjects - Google Chrome

nerc-uat.bwise.net/bwise/app/common/SelectInstancesTable.jsp?flushTrees=true&parentLabel=Subjects&formId=Edit...

Select a type: Requirement Select a view: List

<input type="checkbox"/>	Name
<input type="checkbox"/>	BAL-001-0 (Ontario) R1.
<input type="checkbox"/>	BAL-001-0 (Ontario) R2.
<input type="checkbox"/>	BAL-001-0 (Ontario) R3.
<input type="checkbox"/>	BAL-001-0 (Ontario) R4.
<input checked="" type="checkbox"/>	BAL-001-0 R1.
<input checked="" type="checkbox"/>	BAL-001-0 R2.
<input checked="" type="checkbox"/>	BAL-001-0 R3.
<input checked="" type="checkbox"/>	BAL-001-0 R4.
<input type="checkbox"/>	BAL-001-0.1a (Ontario) R1.
<input type="checkbox"/>	BAL-001-0.1a (Ontario) R2.
<input type="checkbox"/>	BAL-001-0.1a (Ontario) R3.
<input type="checkbox"/>	BAL-001-0.1a (Ontario) R4.
<input type="checkbox"/>	BAL-001-0.1a R1.
<input type="checkbox"/>	BAL-001-0.1a R2.
<input type="checkbox"/>	BAL-001-0.1a R3.
<input type="checkbox"/>	BAL-001-0.1a R4.
<input type="checkbox"/>	BAL-001-0a (Ontario) R1.
<input type="checkbox"/>	BAL-001-0a (Ontario) R2.
<input type="checkbox"/>	BAL-001-0a (Ontario) R3.
<input type="checkbox"/>	BAL-001-0a (Ontario) R4.

Page 1 of 124 Filter by Name: Go Page Size: 50

Update Cancel OK Cancel



Self-Certification Administration

To filter the list of parts or requirements:

13 Type in a part of the standard you are looking for and click **Go**.

14 After you click Go, the page numbers may not update. Click the **next arrow** to see more results and the actual page count.

15 Select parts or requirements.

16 Click the **OK** button.

Selector: Subjects - Google Chrome
 nerc-uat.bwise.net/bwise/app/common/SelectInstancesTable.jsp?flushTrees=true&parentLabel=Subjects&formId=Edit...

Select a type: Part Select a view: List

<input type="checkbox"/>	Name
<input type="checkbox"/>	BAL-001-TRE-1 R10.1.
<input type="checkbox"/>	BAL-001-TRE-1 R10.2.
<input type="checkbox"/>	BAL-001-TRE-1 R10.3.
<input type="checkbox"/>	BAL-001-TRE-1 R2.1.
<input type="checkbox"/>	BAL-001-TRE-1 R2.2.
<input type="checkbox"/>	BAL-001-TRE-1 R2.3.
<input type="checkbox"/>	BAL-001-TRE-1 R6.1.
<input type="checkbox"/>	BAL-001-TRE-1 R6.2.
<input type="checkbox"/>	BAL-001-TRE-1 R6.3.
<input type="checkbox"/>	BAL-001-TRE-1 R9.1.
<input type="checkbox"/>	BAL-001-TRE-1 R9.2.
<input type="checkbox"/>	BAL-001-TRE-1 R9.3.
<input type="checkbox"/>	BAL-001-TRE-1 R9.3.
<input type="checkbox"/>	BAL-001-TRE-2 R10.1.
<input type="checkbox"/>	BAL-001-TRE-2 R10.2.
<input type="checkbox"/>	BAL-001-TRE-2 R10.3.
<input type="checkbox"/>	BAL-001-TRE-2 R2.1.
<input type="checkbox"/>	BAL-001-TRE-2 R2.2.
<input type="checkbox"/>	BAL-001-TRE-2 R2.3.
<input type="checkbox"/>	BAL-001-TRE-2 R6.1.

Page 1 of 228 Filter by Name: BAL-002-1

Selector: Subjects - Google Chrome
 nerc-uat.bwise.net/bwise/app/common/SelectInstancesTable.jsp?rangeStart.selectorattr_subjects=50&formId=Editor&...

Select a type: Part Select a view: List

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	BAL-002-1a R4.1.
<input checked="" type="checkbox"/>	BAL-002-1a R4.2.
<input type="checkbox"/>	BAL-002-1a R5.1.
<input type="checkbox"/>	BAL-002-1a R5.2.
<input type="checkbox"/>	BAL-002-1a R6.1.
<input type="checkbox"/>	BAL-002-1a R6.2.

Page 2 of 2 Filter by Name: BAL-002-1



Self-Certification Administration

17 Click the **Update** button.

18 Click the **Refresh** button to pull in the new question group.

19 Click the **Assessment Type Missing** link to complete the Group.

Subject Type:

Has Specific Subjects:

Subjects:

Disable Approve/Reject in Multi-step Assessment:

DWH Table Name:

Self Cert Administration
Align for Regions

Self-Cert Library
MRO Editor 1

REGION QUESTION LIBRARY INSTRUCTIONS

From here, you can create region-specific questions to augment those defined for the entire ERO. To begin, create a **New Question Group** and select the subject type (whether it applies to Requirements or Parts) and then the subjects (i.e., specific requirements/parts) to which it should apply. Then select "Update."

Refresh the top table on the left to see the created question Group. Click on **Assessment Type Missing** and choose the following options:

Negate	<i>do not use this field</i>
Assessment Attribute	Assessmentdefinition.Assessmenttype
Operation Value	=
Value	Self-Certification <your Region>

Add Questions to the Question Group by clicking on the **Add Question** link. Clicking on a Question Group will filter the Questions below.

SELF CERT ADMINISTRATION - CUSTOM REGION QUESTION GROUPS

	GROUP NAME	APPLICABLE SUBJECTS	
<input type="checkbox"/>	Test Group Question 2	BAL-002-1a R4.1., BAL-002-1a R4.2.	Add Question
	Assessment Type Missing		

19
18

Page 1 of 1



Self-Certification Administration

To fill out the fields on this form, follow the directions in the Instructions panel (A).

20 Leave the **Negate** field at its default selection of "None".

21 Select the **Assessment Definition.Assessment Type** option from the Assessment Attribute dropdown.

New Assessment Condition

Negate: 20 --- None ---

Assessment Attribute * : 21 --- None ---

Operation * : =

Assessment Definition.Enable Alert
 Assessment Definition.Copy answers from previous sessions
 Assessment Definition.Copy answers from previous sessions using formula
 Assessment Definition.Copy answers regardless of assessor
 Assessment Definition.Submit final finishes session
 Assessment Definition.Reassess is allowed
 Assessment Definition.Read Rights On Subjects Required
 Assessment Definition.Define Setup Tree In Assessment
 Assessment Definition.Use Scope and Subject
 Assessment Definition.View Name
 Assessment Definition.DWH Table Name
 Assessment Definition.Aggregate Context
 Assessment Definition.Context
 Assessment Definition.Assessment Type
 Assessment Definition.Previous Assessment Formula
 Assessment Definition.Previous Assessment Formula Description
 Assessment Definition.Collaborative Sessions
 Audit.Description
 Audit.Name
 Audit.Push-Pull Type

Update Cancel



Self-Certification Administration

- 22 Select = for the Operation field. This will create a new field called Value.
- 23 **IMPORTANT:** Be sure to select the correct Region for whom this Question Group applies in the **Value** field. Align will assign the questions you add to the group to this Region.
- 24 Click the **Update** button. Align will assign the questions you add to the group to this Region.

New Assessment Condition

Negate: --- None ---

Assessment Attribute *: Assessment Definition.Assessment Type

Operation *: =

Value *: Self Certification MRO

--- None ---

Self Certification MRO

Self Certification TXRE

Self Certification NPCC

Self Certification WECC

Self Certification RF

Self Certification SERC

Self Certification

Periodic Data Submittal

Update Cancel



Self-Certification Administration

To add questions to the group that you have created:

25 Click the **Add Question** link.

26 Give the question a **Name** for your reference.

27 Type the question that you want the entity to answer into the **Question** field.

28 Add any instructions or clarifications into the **Help Text** field (not mandatory).

SELF CERT ADMINISTRATION - CUSTOM REGION QUESTION GROUPS

<input type="checkbox"/>	GROUP NAME	APPLICABLE SUBJECTS	
<input type="checkbox"/>	Test Group Question 2 Self Certification MRO	BAL-002-1a R4.1., BAL-002-1a R4.2.	<div style="border: 2px solid blue; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; font-weight: bold; color: white;">25</div> Add Question

Question

Name * :

Question * :

27

Question Parameters:

<ca_CFRNotApplicable>, <ca_PendingInactive>, <ca_rankID>, <ca_CEANotApplicable>, <ca_AdditionalEffectiveDateDetails>, <ca_CFRNotes>, <ca_PriorVersion>, <ca_AdditionalApplicabilityDetails>, <ca_SubReqOrPartLanguage>, <ca_requirement>, <ca_PartApplicability>, <ca_StandardRegionJurisdiction>, <ca_InactiveDate>, <ca_InternalNotes>, <ca_PartNumber>, <ca_ParentCopy>, <ca_EffectiveDate>, <ca_versionHistory>, <ca_CEANotes>, <ca_MeasuresandValidationGuidance>, <ca_ParentOriginal>, <ca_PublicNotes>, <description>, <label>, <parentObject>

28

Help Text:

References:

Type * :

Mandatory:

Mandatory based on question:

Before Question:

Grouped Question:

Has Reporting Column:

Type specific details

Default Value:

Number Of Characters:

Style:

Width of Question Text (%):

Is Hidden:



Self-Certification Administration

29 Select the question **Type** from the Predefined Question Type section of the Type dropdown.

NOTICE: The Document option in the Type dropdown will allow your entities to Attach documents within Align. This would only be used in rare cases as all artifacts should come through the ERO SEL.

30 Depending on the Type that you select, you can adjust the parameters of the question in the **Type specific details** section (not mandatory).

31 Click the **Update** button.

Question Parameters: `<ca_CFRNotApplicable>, <ca_PendingInactive>, <ca_rankID>, <ca_CEANotApplicable>, <ca_AdditionalEffectiveDateDetails>, <ca_CFRNotes>, <ca_PriorVersion>, <ca_AdditionalApplicabilityDetails>, <ca_SubReqOrPartLanguage>, <ca_requirement>, <ca_PartApplicability>, <ca_StandardRegionJurisdiction>, <ca_InactiveDate>, <ca_InternalNotes>, <ca_PartNumber>, <ca_ParentCopy>, <ca_EffectiveDate>, <ca_versionHistory>, <ca_CEANotes>, <ca_MeasuresandValidationGuidance>, <ca_ParentOriginal>, <ca_PublicNotes>, <description>, <label>, <parentObject>`

Help Text:

References:

Type * : **29**

Mandatory:

Mandatory based on question:

Before Question:

Grouped Question:

Has Reporting Column:

Type specific details

Default Value:

Number Of Characters:

Style:

Width of Question Text (%):

Is Hidden:

31



Self-Certification Administration

Custom Region Questions (A)

Once you complete a question, it will appear in the Custom Region Questions section. Notice that there are two copies of the same question – one for each Requirement or Part that it applies to.

Self-Cert Question Preview (B)

Once you have added an active question, you will see it appear on each new Self-Cert that you create in the Self-Cert Question Preview section when creating distributions. The question preview will only show up prior to the Self-Certification being distributed (only while it appears in the **Create Distribution** tab of the **Self-Certification** module).

Notice: It is vital to ensure custom questions are working properly. Region users should first create these questions in the Align Training environment prior to creating them in Production. If errors are made when entering questions in Production and distributed to entities, they cannot be fixed after and will require cancelling the Self-Cert request(s) to reissue with fixed questions.

Self Cert Administration

Self-Cert Library

REGION QUESTION LIBRARY INSTRUCTIONS

From here, you can create region-specific questions to augment those defined for the entire ERO. To begin, create a **New Question Group** and select the subject type (whether it applies to Requirements or Parts) and then the subjects (i.e., specific requirements/parts) to which it should apply. Then select "Update."

Refresh the top table on the left to see the created question Group. Click on **Assessment Type Missing** and choose the following options:

Negate	do not use this field
Assessment Attribute	Assessmentdefinition Assessmenttype
Operation Value	=
Value	Self-Certification <your Region>

Add Questions to the Question Group by clicking on the **Add Question** link. Clicking on a Question Group will filter the Questions below.

SELF CERT ADMINISTRATION - CUSTOM REGION QUESTION GROUPS

GROUP NAME	APPLICABLE SUBJECTS	
Test Group Question 2 Self Certification MRO	BAL-002-1a R4.1., BAL-002-1a R4.2.	Add Question

Page 1 of 1

SELF CERT ADMINISTRATION - CUSTOM REGION QUESTIONS

APPLICABLE TO	QUESTION PREVIEW
BAL-002-1a R4.1.	What is today's date? Click here to edit
BAL-002-1a R4.2.	What is today's date? Click here to edit

Page 1 of 1



Self-Cert Question Preview

QUESTIONS

Please indicate your response for this part:

Please indicate your response for this requirement:

Please provide any comments you might have related to this Requirement here:

What is today's date?

Page 1 of 1

Note: Changes to this list of questions can be made in the Question Library.



Self-Certification Administration

If you need to deactivate a question, from the Self-Cert Administration module:

- 1 Select the **Click here to edit** link for the desired question.
- 2 Change the **Is Hidden** field to 'Yes'.

NOTICE: You cannot hide a question that is mandatory (A). This will throw an error (B). Ensure questions are not marked mandatory before hiding them.

- 3 Click the **Update** button.

APPLICABLE TO	QUESTION PREVIEW
BAL-002-1a R4.1.	What is today's date? Click here to edit
BAL-002-1a R4.2.	What is today's date? Click here to edit

Question: 1. What is your favorite animal? - Google Chrome

nerc-uat.bwise.net/bwise/app/common/CloseEditor.aspx?action=QuestionAction&scrollY=0

Question: 1. What is your favorite animal?

Type validation failed for attribute Mandatory (A question cannot be hidden and mandatory at the same time)

Name: Question 1

Question * : 1. What is your favorite animal?

Question Parameters: <ca_CFRNotApplicable>, <ca_PendingInactive>, <ca_rankID>, <ca_CEANotApplicable>, <ca_AdditionalEffectiveDateDetails>, <ca_CFRNotes>, <ca_PriorVersion>, <ca_AdditionalApplicabilityDetails>, <ca_SubReqOrPartLanguage>, <ca_requirement>, <ca_PartApplicability>, <ca_StandardRegionJurisdiction>, <ca_InactiveDate>, <ca_InternalNotes>, <ca_PartNumber>, <ca_ParentCopy>, <ca_EffectiveDate>, <ca_versionHistory>, <ca_CEANotes>, <ca_MeasuresandValidationGuidance>, <ca_ParentOriginal>, <ca_PublicNotes>, <description>, <label>, <parentObject>

Help Text:

References:

Type: Text Line

Mandatory: Yes

Mandatory based on question: --- None ---

Before Question: What is today's date?

Grouped Question: No

Has Reporting Column: No

Type specific details

Default Value:

Number Of Characters:

Style: --- None ---

Width of Question Text (%):

Is Hidden: Yes

Formula: No

Initial Value Formula: No

Update Cancel

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 SC module