NERC
NORTH AMERICAN ELECTRIC RELIABILITY CORPORATION

BESNet Training Manual

Pre-Implementation Account Management and Self-Determined Notifications for Registered Entities

June 18, 2014
Version 1-1

RELIABILITY | ACCOUNTABILITY

3353 Peachtree Road NE
Suite 600, North Tower
Atlanta, GA 30326
404-446-2560 | www.nerc.com

Table of Contents

Introduction 3
BESNet Program Cautions 4
Version History 5
User Account Management 6
Introduction 6
Creating a New Account 6
Creating Account Step 1: User Name and Password 6
Creating Account Step 2: Verify Account 8
Logging Into the BESNet Application 10
Selecting the User's Entity to Use 11
Setting up Your BESNet Application Account 12
Account Setup Step 1: Select Account Type 12
Account Setup Step 2: Association of Account with Entities 13
Editing Your User Profile 16
Password Management 17
Changing User Password 17
Forgot/Resetting the User Password 18
Managing Your User Account Properties 21
Logging Out 22
Administrator User Account Management 23
Administrative User Management 23
Vetting New Users 23
User Role Management 24
BESNet Dashboard Overview 25
Notifications of Self-Determination 27
Creating a Notification of Self-Determination 27
Create Notification of Self-Determination Screen Section 1: General Information 27
Create Notification of Self-Determination Screen Section 2: Detailed Information 30
Adding an Element to a Notification of Self-Determination 31
Add Supporting Documentation for the Element 39
Certifying the Notification of Self-Determination 40
Submitting the Notification of Self-Determination 40

Introduction

NOTE: This pre-implementation manual ONLY addresses Account Management for Registered Entities and Submittal of Self-Determined Notifications. As we near the July 1, 2014, implementation date, additional sections will be made available regarding other parts of the process and application.

Entity Administrator accounts should be the first accounts set up within the BESnet Application. Once the Primary Compliance Contact has established his or her Entity Administrator account, they can then work with the other individuals within their companies to set up additional User and Administrator accounts.

This user manual provides a guided walkthrough to illustrate the BES Notifications and Exceptions Tool (BESNet). The system provides a workflow-based process that emulates the BES Exceptions Procedure, as outlined in NERC RoP Appendix 5, to route, evaluate and take actions on Exception Requests and Self-Determined Notifications.

Users have the ability to login to a secure portal and create both Exception Requests and Self-Determination Notifications. Depending upon the selection, the user is provided with the appropriate Exception or Self-Determination form to which they are able to provide details regarding the Request / Notification. Each form captures the relevant details for the Submitting and Owning Entities, Inclusion and Exclusion rules, Element Descriptions and one or more elements.

Upon completion of the form, the Entity is able to submit the Request / Notification. The system will automatically notify all appropriate parties of the submission. This includes Submitting and Owning Entities, Scope of Responsibility Entities, Regional Entities and NERC. BESNet provides facilities for Regional Entities to acknowledge Notificaton elements and process Exception Requests, request and receive supplemental information, alert and notify participants, issue recommendations, and monitor periodic re-certification of requests. In addition, NERC can create proposed and final decisions, as well as manage appeals to those decisions.

Queries have been created for accessing information about Exception Requests and Notifications enabling the BESNet to produce a list of facilities and Elements for which: 1) exceptions to the definition have been granted and 2) self-determination Notifications have been submitted. NERC will publicly post reports on its website that will provide interested persons, including applicable governmental authorities, information regarding submitted Exception Requests that may be of interest to them.

BESNet Program Cautions

The following cautions should be followed when using the BESNet program.

A. DO NOT use the back button in your browser.

B. Be sure to scroll right and left within your browser (depending on your screen resolution) to ensure that all required information can be entered in the browser.

Version History

The following is the history of changes to this document.

Version	Date	Change(s) Made	Change Tracking
1-0	May 9, 2014	Initial Release – User Account Management Section only	
1-1	June 19, 2014	Incremental Release – Addition of Submittal of Self-Determined Notifications	

User Account Management

Introduction

The BESNet application operates within the framework of the ERO Enterprise Platform, which includes several applications, such as the NERC Standards Balloting System.

Note – If you already have an ERO Platform Account (for the new Standards Balloting System), please proceed to Setting up New Account in the BESNet Application section of this User Guide.

When creating accounts, it is essential to make sure your Entity Administrator account is set up before any other accounts. Your Entity Administrator should be the person who is registered with NERC as your Primary Compliance Contact (PCC). Requesting accounts before the Entity Administrator account is set up will result in having to re-register those accounts later.

Creating a New Account

If you do not have an existing ERO Platform user ID, you will need to create a new account for the BESNet application. The new user must supply user profile information and identify the organization the user represents.

Once an account is created, an administrator will vet the user as a person for role-based, individual access to the system. Once vetted, a user will be notified through email that they can login to the system.

Creating Account Step 1: User Name and Password

Navigate to the following URL:

https://BESNET.EROENTERPRISE.COM

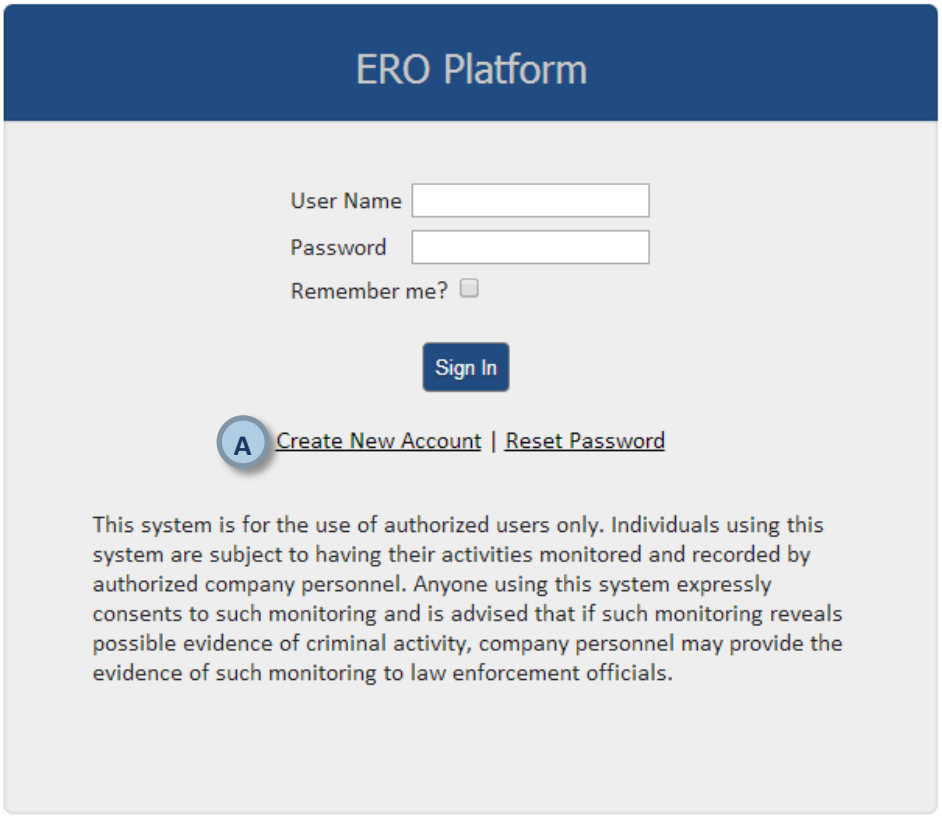

Figure 1: ERO Platform Login Screen

A. Click on **Create New Account** (A). The following screen will appear.

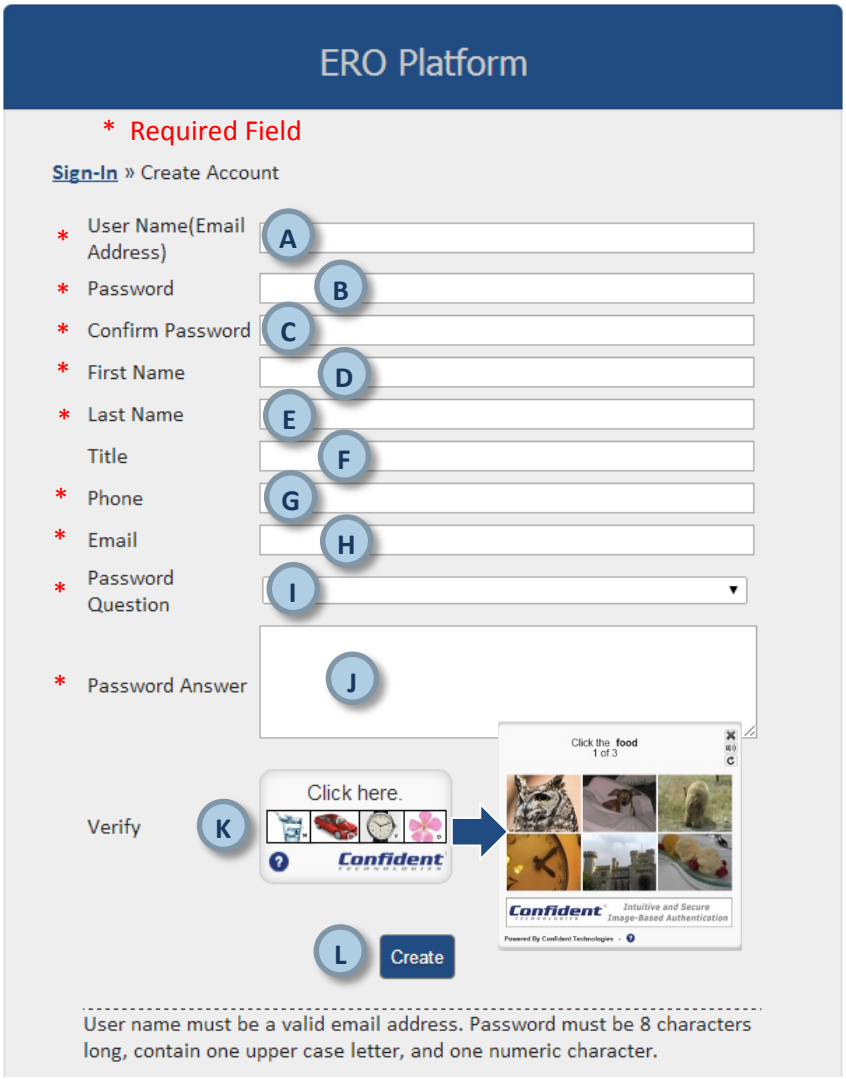

Figure 2: Create Account Screen

To create a new account,

A. Enter a **User Name** (MUST be a business email address - this can be the same email in step H).
B. Enter a **Password**. As the on-screen instructions indicate, this password:
    a. Must be at least eight (8) characters in length.
    b. Must contain at least one uppercase letter.
    c. Must contain at least one numeric character.
C. Re-enter the **Password**.
D. Enter the user's **First Name**.
E. Enter the user's **Last Name**.
F. Enter the user's **Title**.
G. Enter a valid business **Phone Number** where the user may be reached.
H. Enter an **Email Address**. This ***MUST*** be a valid email address, as it will be used to send ***ALL*** notifications of actions and status updates within the system. Both **User Name** and **Email Address** may be the same.

NOTE: Changing this field does not change a user's username.

I. For security purposes, select a **Password Question** from the list of questions.

J. Enter the **Password Answer** to the security question (I).

K. Select the **Verify** icon (K). Several images display. Select the correct image of each description as instructed until all three pictures have been verified.

L. Click the **Create** button (L).

Creating Account Step 2: Verify Account

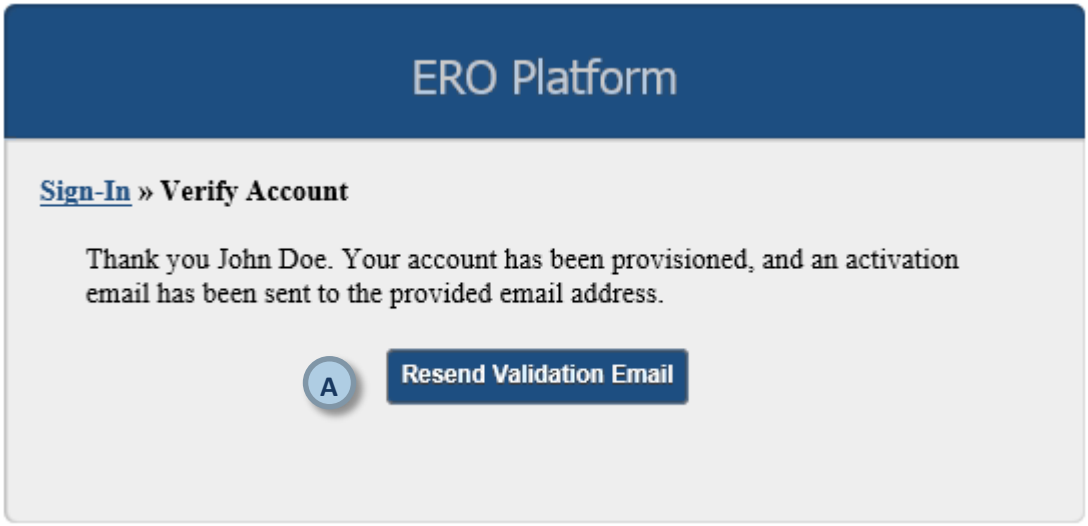

Figure 3: Verify Account Screen

Upon successful verification of the account information provided on the **Create Account** form, a verification email will be sent to the email account used to create your user account.

A. If you have not received the activation email, SELECT the **Resend Validation Email** (A) to have the activation email resent to the email address provided.

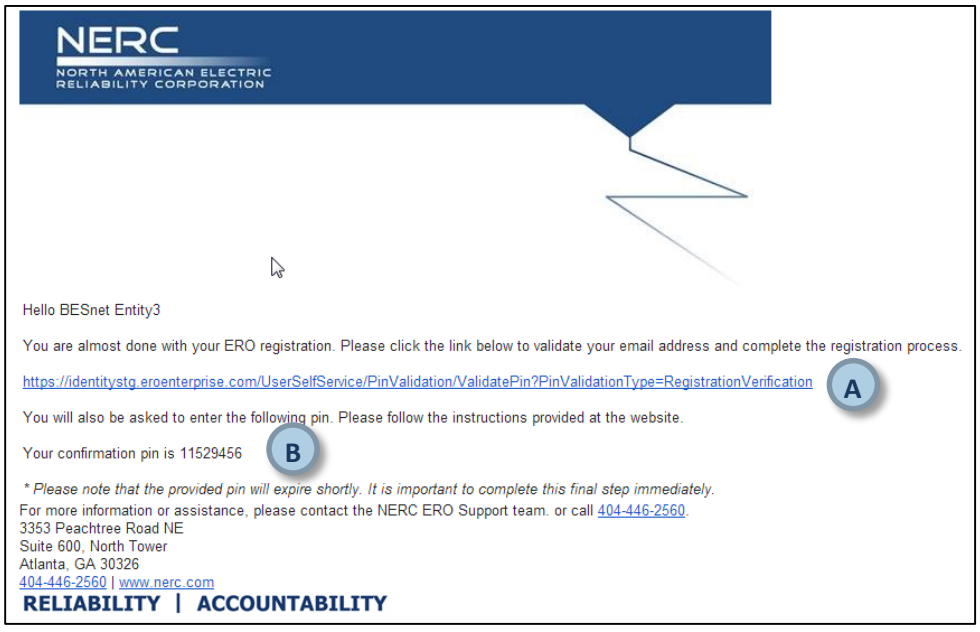

Figure 4: Sample Activation E-Mail

A. Click on the **link** (A) provided in the verification email above. The following screen will appear:

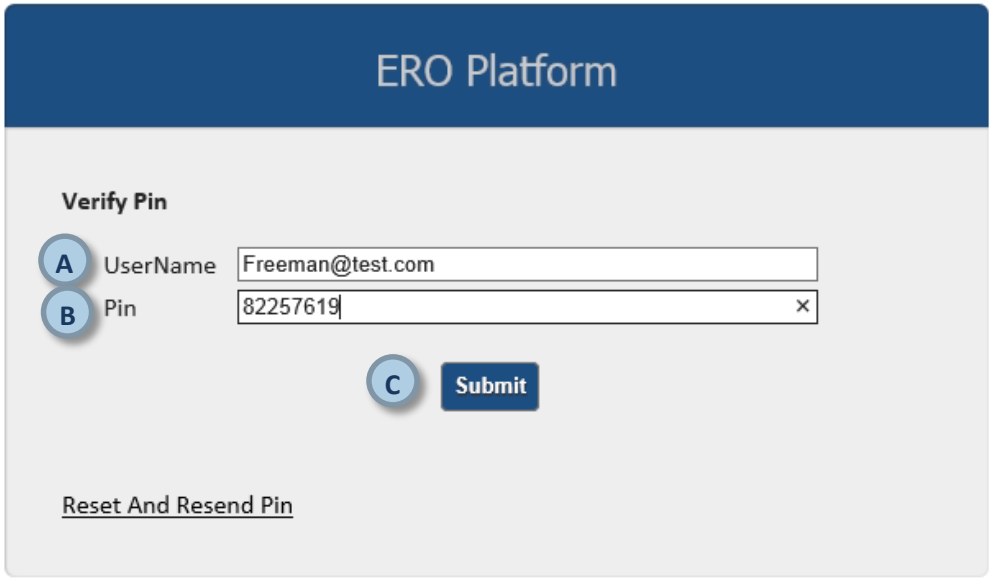

Figure 5: PIN Verification Screen

A. Enter your **User Name** (A).

B. Enter the **PIN** (B) contained in the verification email.

C. Click **Submit** (C).

PIN Expiration Procedure

If the PIN has expired, the following screen will appear:

NOTE: PINs expire 60 minutes after issuance.

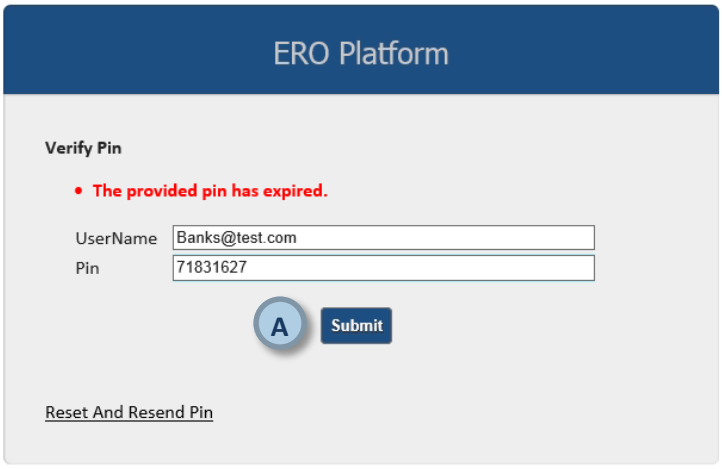

Figure 6: PIN Expiration Screen

A. Click on **Reset and Reset PIN** (A). A new verification email will be sent with a new PIN.

Once you have successfully created a user ID and it has been verified, the **ERO Platform Screen** will appear.

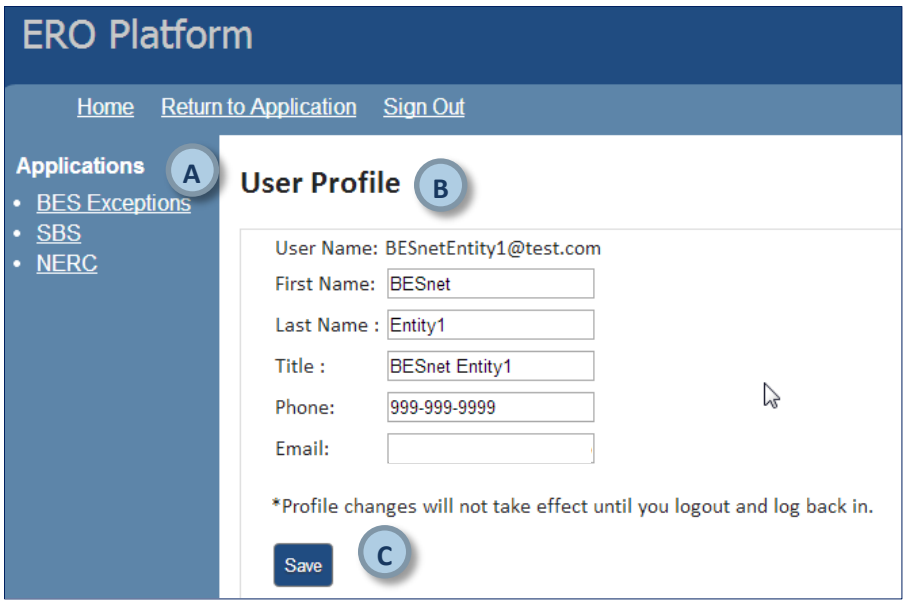

Figure 7: ERO Platform Screen

A. To enter the BESNet application, click on **BES Exceptions** (A).

B. At this screen, you also have the opportunity to modify your User Profile (B).If you have updated your profile, click **Save** (C) to save the changes.

   Note: You will have to logout of the application and log back in for the profile changes to take effect.

Logging Into the BESNet Application

For users who already have an account with BESNet, navigate to the following URL:

https://BESNET.EROENTERPRISE.COM

A. Enter the **User Name** (A).

B. Enter the **Password** (B) entered during the user registration process defined in Section **Creating a New Account.**

C. If desired, check the **Remember me?** (C) Checkbox, which gives permission for the system to remember the credentials entered.

D. Once completed with these fields, complete the login process by pressing the **Sign In** (D) button.

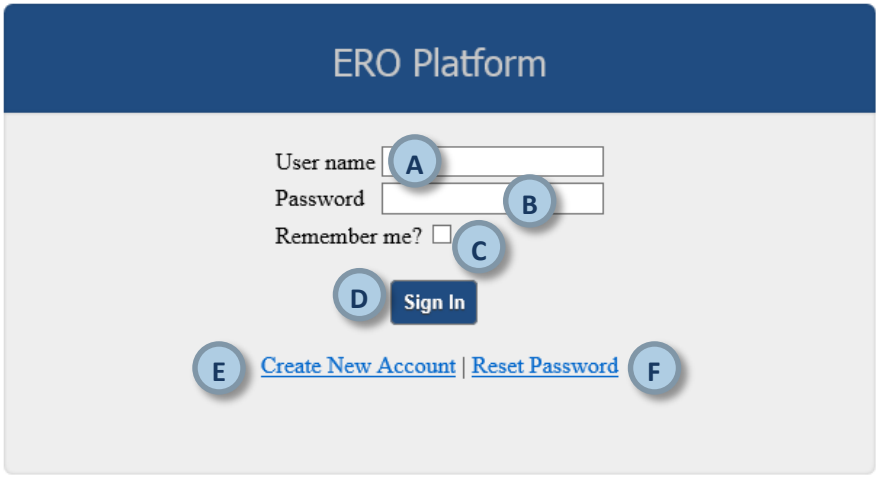

Figure 8: ERO Platform Log-In Screen

For users who do not have an account:

E. Click the **Create New Account** (E) link. See Section **Creating a New Account** for more details.

To reset your password.

F. Click the **Reset Password** (F) link. See Section **Resetting the User Password** for more details.

Selecting the User's Entity to Use

If the user has been vetted as a representative for more than one Entity, the user will first be prompted to select the Entity they wish to represent for the current session. Users who are only vetted for a single Entity will skip this step.

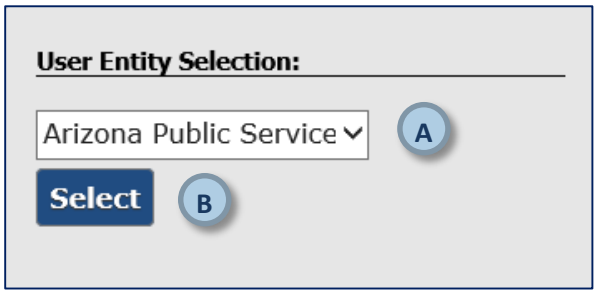

Figure 9: User Entity Selection Screen

To identify the Entity the user will represent during this session:

A. Select the **Entity Name** (A) from the Entity list. Only those for which this user has been vetted will appear.

B. Click the **Select** (B) button.

Setting up Your BESNet Application Account

Once your BESNet User ID has been established, you will need to finish setting up the functions of the new account.

Navigate to the BESNet application: https://BESNET.EROENTERPRISE.COM. You will be shown your user profile.

Select the BES Exceptions tab on the left (A) of the **ERO Enterprise Platform Entry Page**.

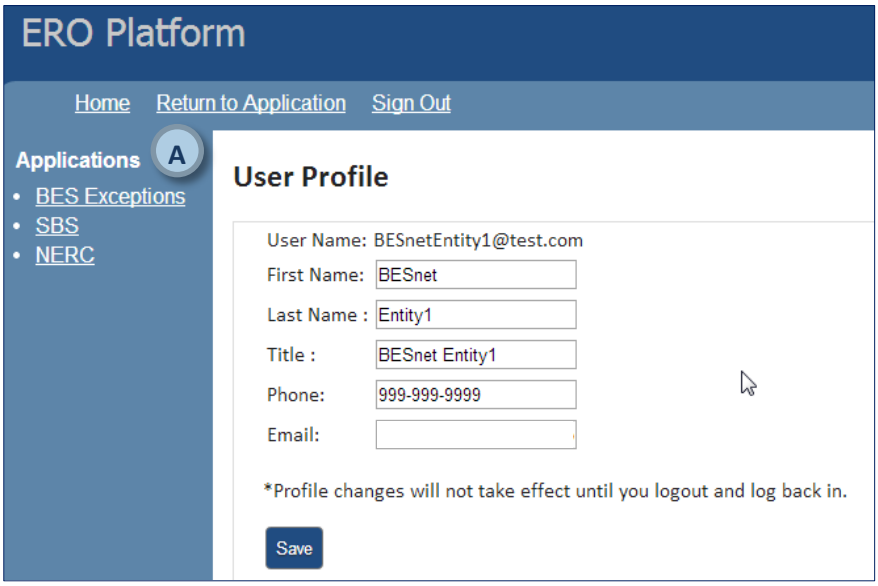

Figure 10: ERO Enterprise Platform Entry Page

Account Setup Step 1: Select Account Type

You must select an **Account Type**. Registered Entities may only select the Registered Entity account type.

A. Select Registered Entity as your **Account Type** (A).

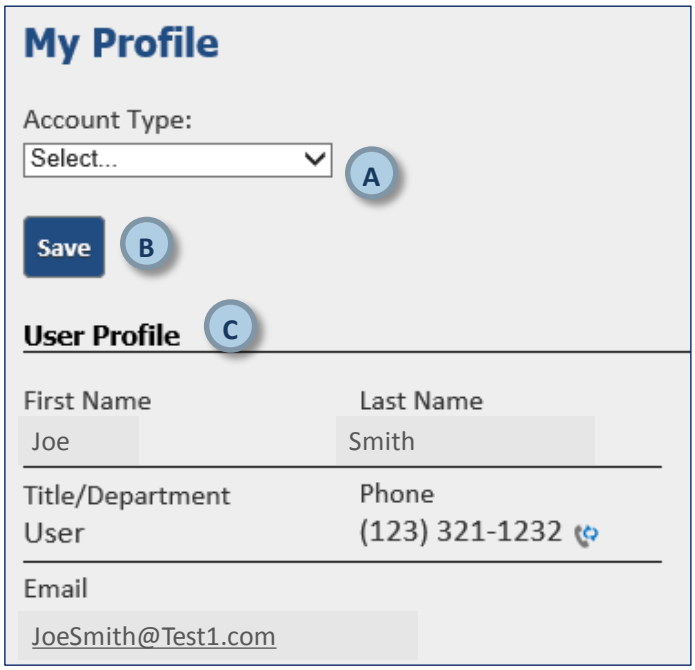

Figure 11: Account Type Selection Screen

Account Type	Description
Registered Entity	Accounts for members of the entities registered with NERC and/or the national Regions. Includes members of submitting, owning, and scope of responsibility entities.

NOTE: Each user account may only be created for a single account type. Account type selection is only available one time following new account creation. ***The account type cannot be changed once it has been selected.***

B. Click the **Save** button (B). This will take you to the **My Profile** screen.

NOTE: The user's profile information entered during the first step of account creation appears in the ***User Profile*** *area (C).*

Account Setup Step 2: Association of Account with Entities

The next step in the registration process is to associate the user's account with one or more Entities on the **My Profile Screen**.

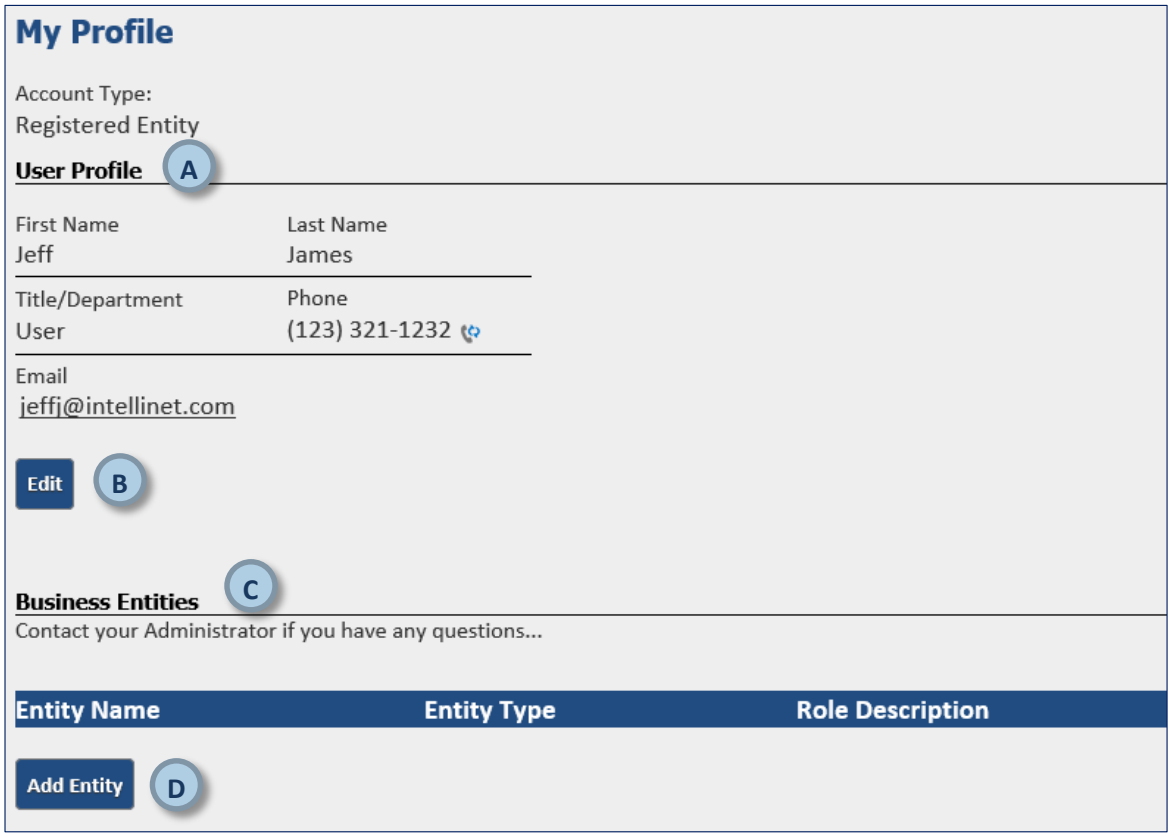

Figure 12: My Profile Screen

The next step in the registration process is to associate the account with one or more Entities.

A. View the User Profile information in the **User Profile** section (A).
B. If desired, edit the **User Profile** information by clicking the **Edit** button (B). See the **Editing Your User Profile** section for further details.
C. View the listing of the **Business Entities** (C) with which the account is currently associated in the **Business Entities** list. When initially registering, this list will be empty.
D. To associate the account with an Entity, click the **Add Entity** button (D). This displays the **Entity Listing Screen** allowing you to select the Entities to be applicable to this user.

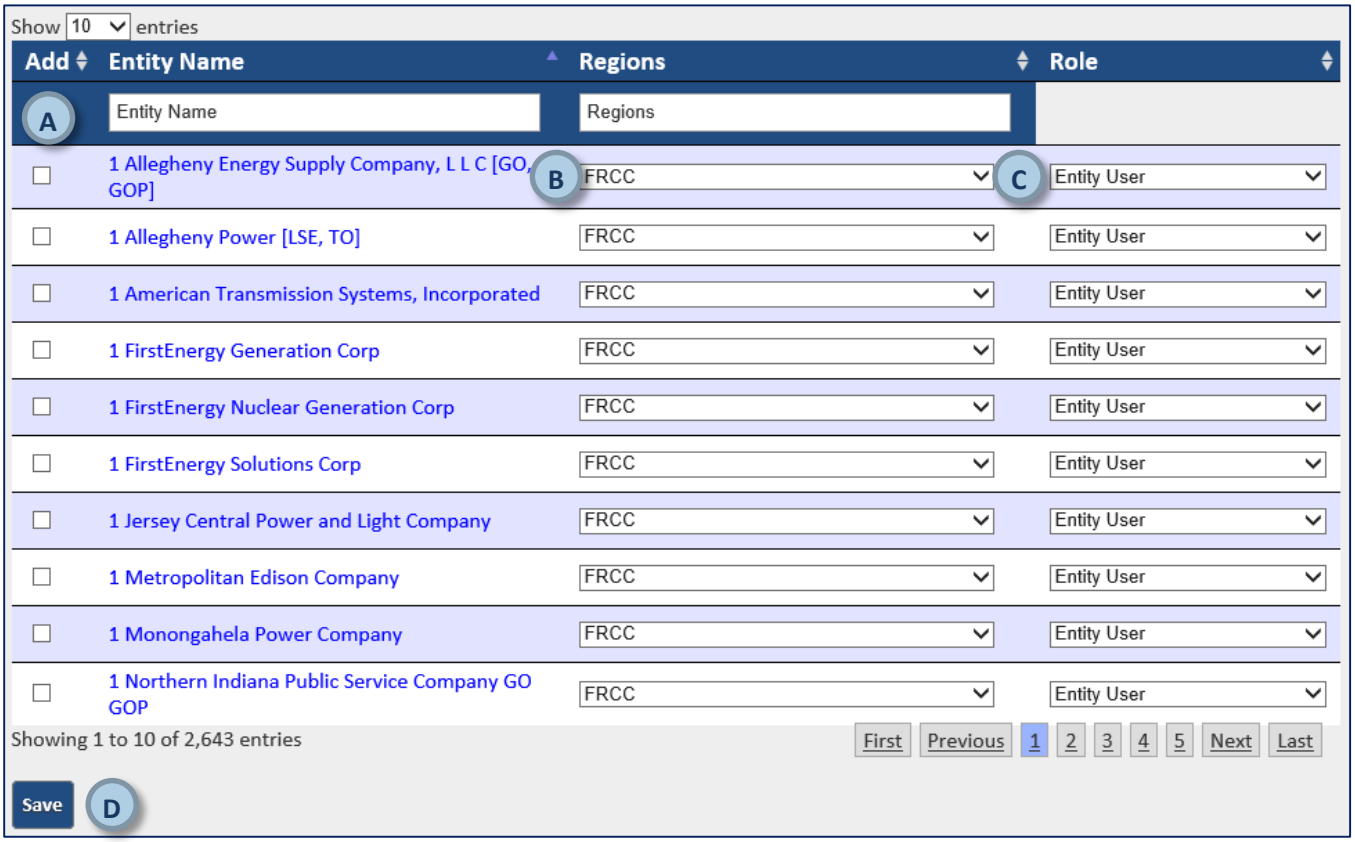

Figure 13: Entity Selection Screen

A. From this list, select the Entity to associate with the account by clicking the checkbox to the left of the Entity record, in the **Add** column (A).

   a. The Entity listing can be filtered by typing in the **Entity Name** filter textbox in the header (directly beneath the **Entity Name** label).

B. Select the **Region** (B) that will be responsible for vetting the user account if an administrator for this Registered Entity does not yet exist in the system. (If there is an Entity Administrator role already associated to the Registered Entity, a vetting request will be sent to that Entity Administrator).

   NOTE: Choosing the Regional Entity in this screen does not associate a Registered Entity to a Region within the system; this is only used for vetting requests for account access.

   NOTE: If you do not see your Entity listed in the list, contact your Regional Entity.

C. Select the **Role** (C) the account will perform for that Entity. Roles are:

   a. Entity User: A general user of the system.

   b. Entity Administrator: A user who has the ability to vet user accounts for that Registered Entity, as well as perform all functions of the Entity User role.

   NOTE: The system does not allow a user to change his or her role for an Entity. Instead, the Entity Administrator must remove the user's association with the Entity, after which the user must submit a new request to be associated to the Entity with the new role.

D. **Repeat steps A through C for each Entity to be associated with the account**. When complete, click the **Save** button (D). This will bring up the **Vetting Request Confirmation Screen**. This confirms your request

to be vetted by the Entity Administrator(s) associated for each selected Entity (See the **Vetting Users** section for further detail) and the following screen will be displayed.

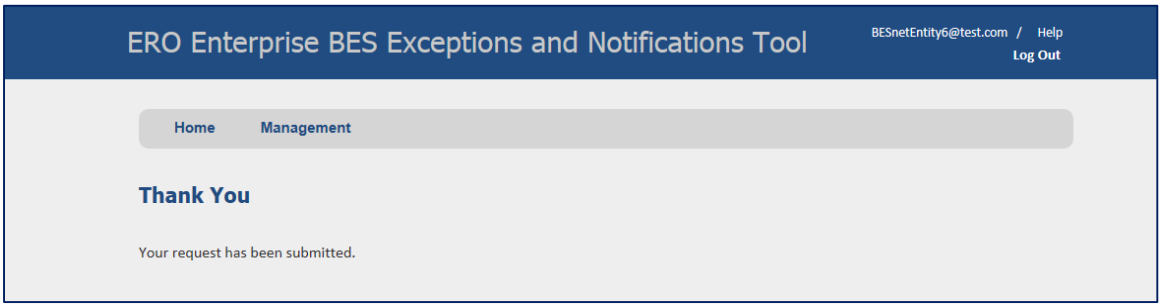

Figure 14: Vetting Request Confirmation Screen

The Entity User will be notified by e-mail when each association request has been vetted (approved or rejected).

If a request for association with an Entity has been rejected, there will be an e-mail notification that you have been rejected.

If the user has not received a vetting response within five business days, contact your Regional Entity or your Entity Administrator.

Once the account user has received notification that the request has been vetted and approved, the user will see the Entities associated with his account in the **My Profile Screen (A)**.

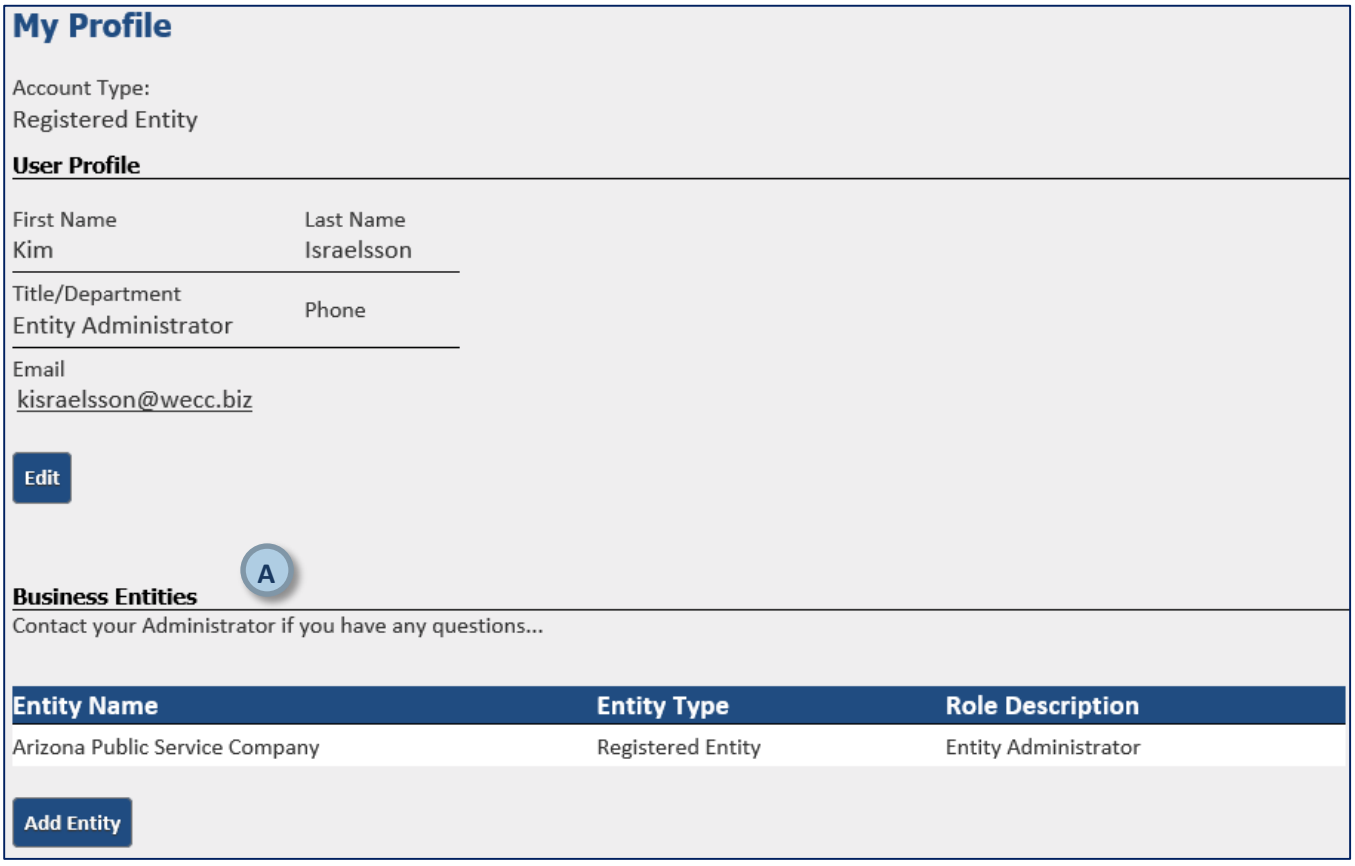

Figure 15: My Profile Screen with Entity Association

The user can then access the information for that Entity in the BESNet application.

Editing Your User Profile

To update your User Profile, enter the desired update(s) in the appropriate field on the **User Profile Screen** and press **Save** (A).

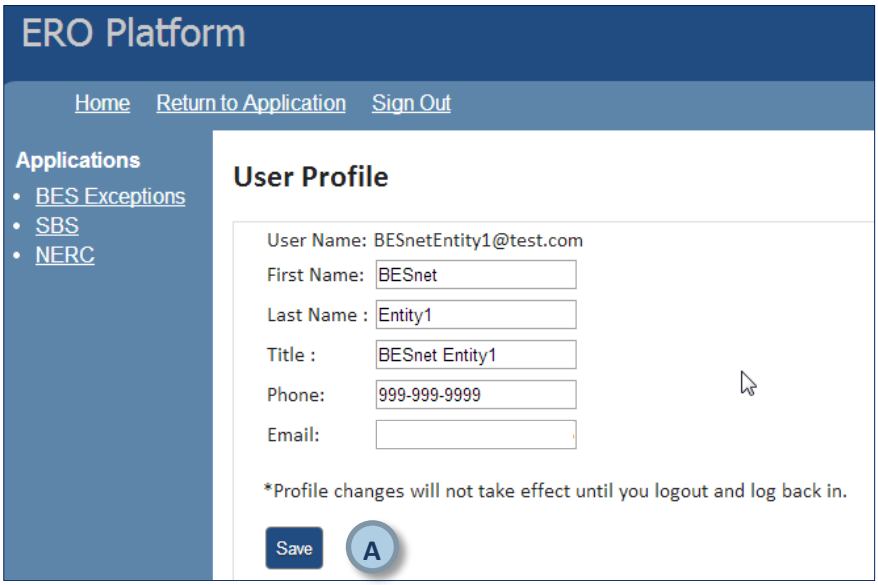

Figure 16: User Profile Screen

If your profile changes have been successful, the **Profile Update Confirmation Screen** will be displayed.

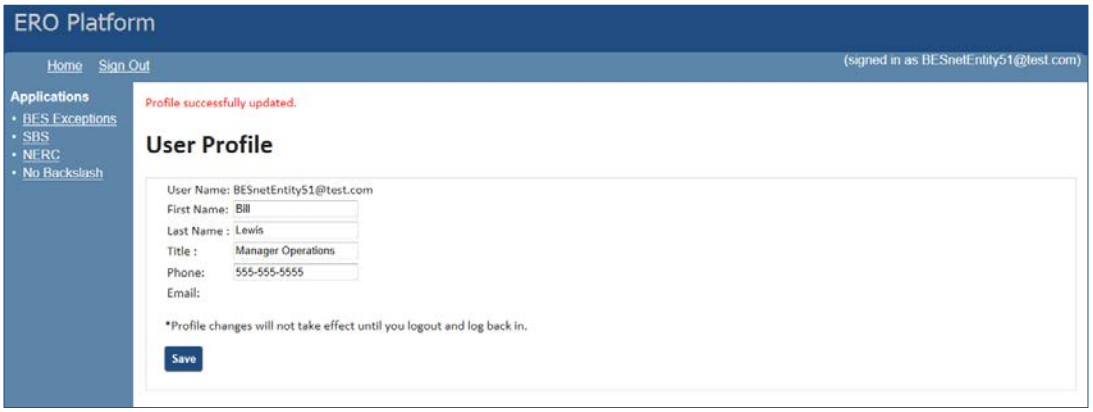

Figure 17: Profile Update Confirmation Screen

Log out and back into the BESNet application.

NOTE: Profile changes will NOT take effect until you log out and log back into the BESNet application.

Password Management

Changing User Password

A. If a User wishes to change his password, he should hover over the **User** tab in the header of the **BESNet Dashboard** and then click on the **My Profile** tab in the dropdown. This will bring you to the **My Profile Screen**.

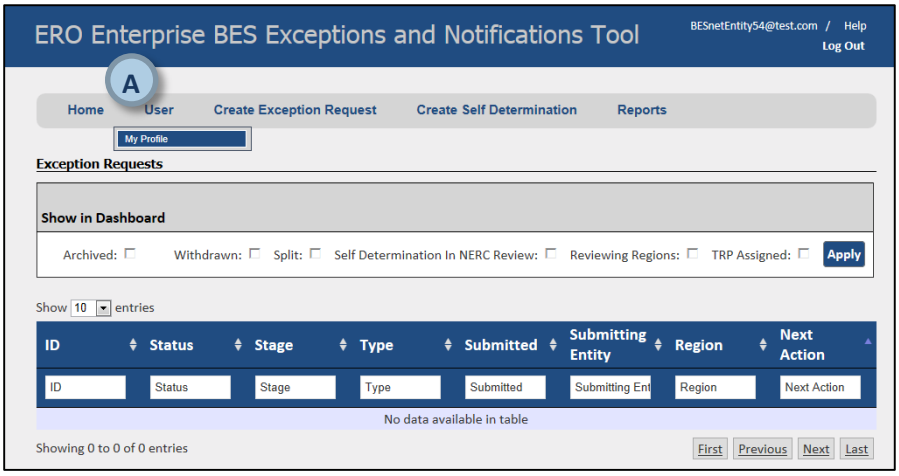

Figure 18: BESNet Home Page

B. Click on the **Edit** button (A) on the **My Profile Screen**. This will bring you to the **User Profile Screen**.

Figure 19: My Profile Screen

C. Click on the **Reset Password** link (A) under **Password** on the **User Profile Screen**.

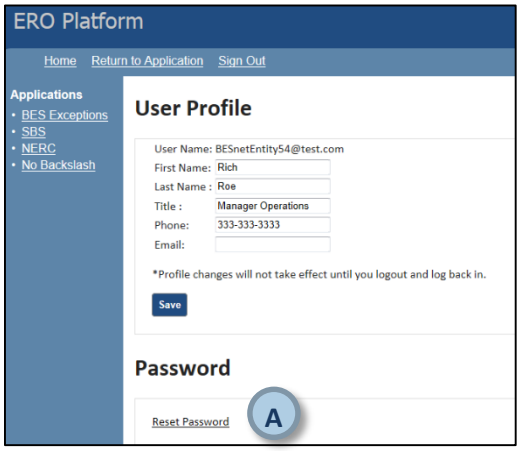

Figure 20: User Profile Screen

D. Continue from **Step B** of the **Forgot/Resetting the User Password** instructions below.

Forgot/Resetting the User Password

If a user has forgotten his password, the password must be reset.

A. To reset a user's password, the user should select **Reset Password** (A) from the **ERO Platform Log-In Screen**. The system then displays the **Password Reset Screen**.

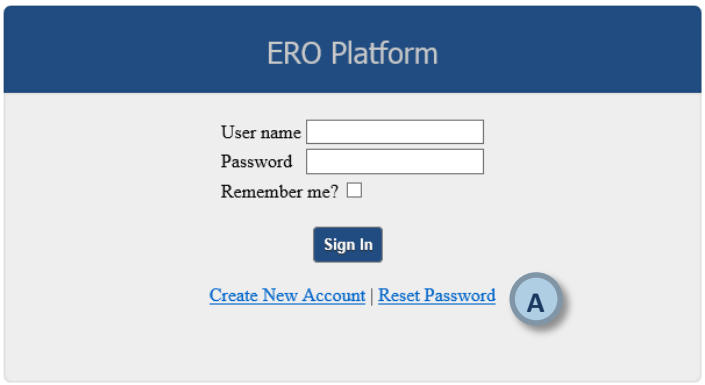

Figure 21: ERO Platform Log-In Screen

B. From the **Password Reset Screen**, the user can
- Enter the **User Name** (A).
- Enter the **Email Address** (B) associated to the Account
- Select the **Verify** icon (C). Several images display. Select the correct image of each description as instructed until all three pictures have been verified.
- Click the **Submit** (D) button.

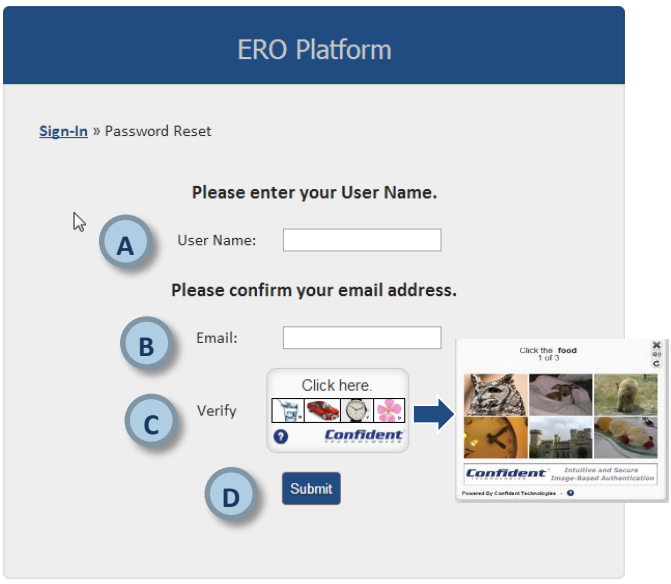

Figure 22: Password Reset Screen

C. The BESNet application will send a **Password Reset Request E-mail** to the user and display the **Password Reset Validation Screen**. If necessary, the user can request that the **Password Reset Request E-mail** be resent pressing the **Resend Validation Email** (A).

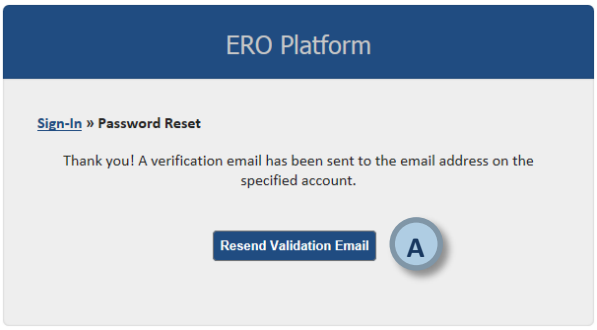

Figure 23: Password Reset Validation Screen

D. The user should then copy the **Confirmation Pin** (A) and click on the **URL** (B) for to change the password

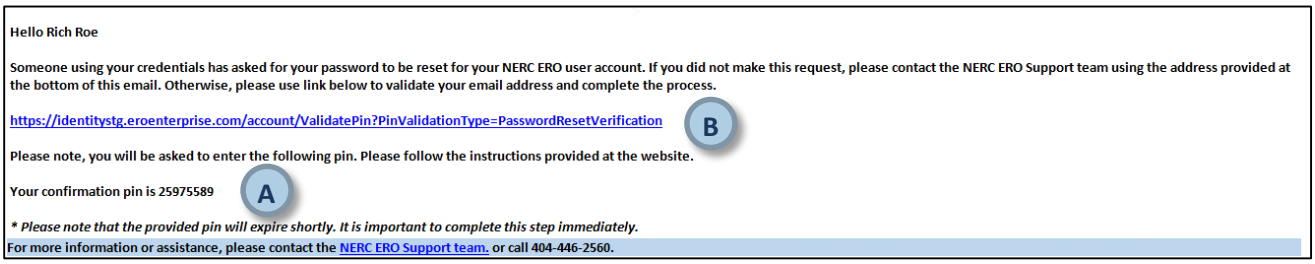

Figure 24: Password Reset Request E-mail

E. The user should then enter his **User Name** (A) and paste the **PIN** (B) on the **Verify Pin Screen** and press **Submit** (C).

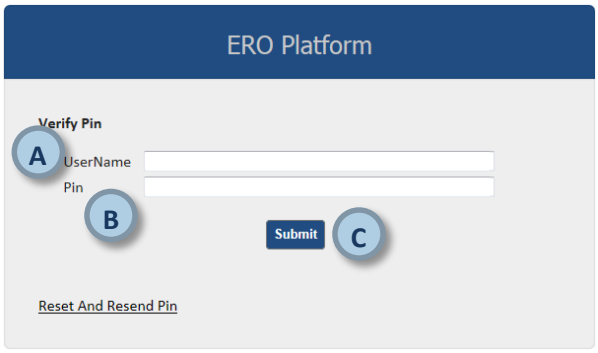

Figure 25: Verify Pin Screen

F. Once the PIN has been entered, the user must enter the **Password Answer** (A) selected during the registration process and click the **Submit Question** (B) button on the **Password Recovery Screen.**

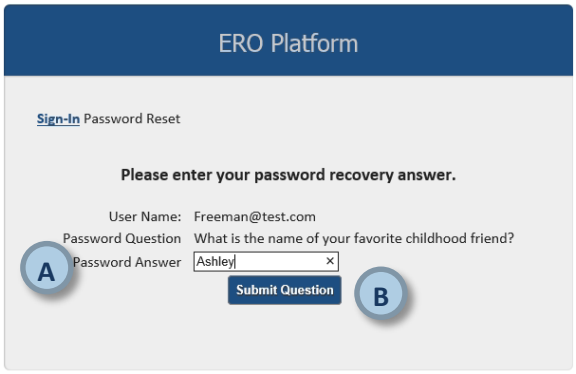

Figure 26: Password Recovery Screen

G. The user should then enter the desired **New Password** (A), Confirm Password (B), and click the **Save Password** (C) button on the **Enter Net Password Screen**.

Figure 27: Enter New Password Screen

H. The BESNet application will send a **Password Change Confirmation E-mail** to the user and display the **User Profile Screen**.

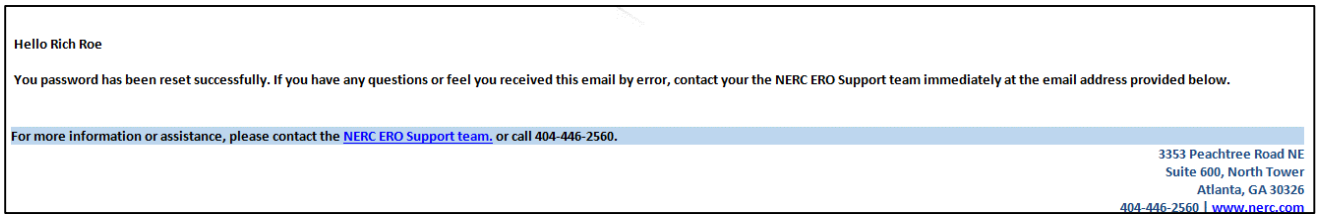

Figure 28: Password Change Confirmation E-mail

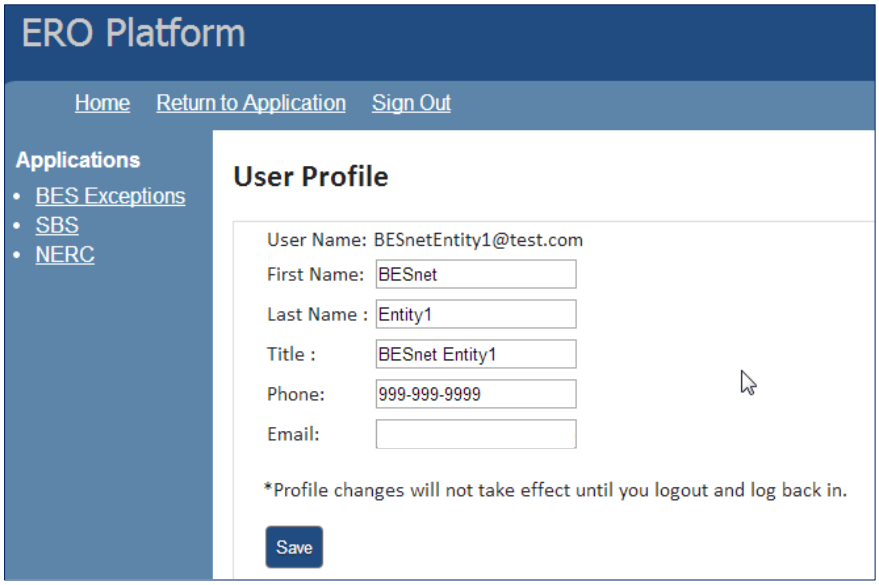

Figure 29: User Profile Screen

Managing Your User Account Properties

A user of the BESNet application can manage their account properties whenever they are logged on to the system. This allows them to edit their user profile or associate themselves with a new Entity. User can access their user account properties in one of two ways:

A. Clicking on the **User Name** in the upper right corner of the BESNet application screen.

Figure 30: BES Application Screen Header

A. Selecting **User > My Profile** from the dashboard menu.

Figure 31: Dashboard Menu Detail

These will display the **User Profile Management** screen.

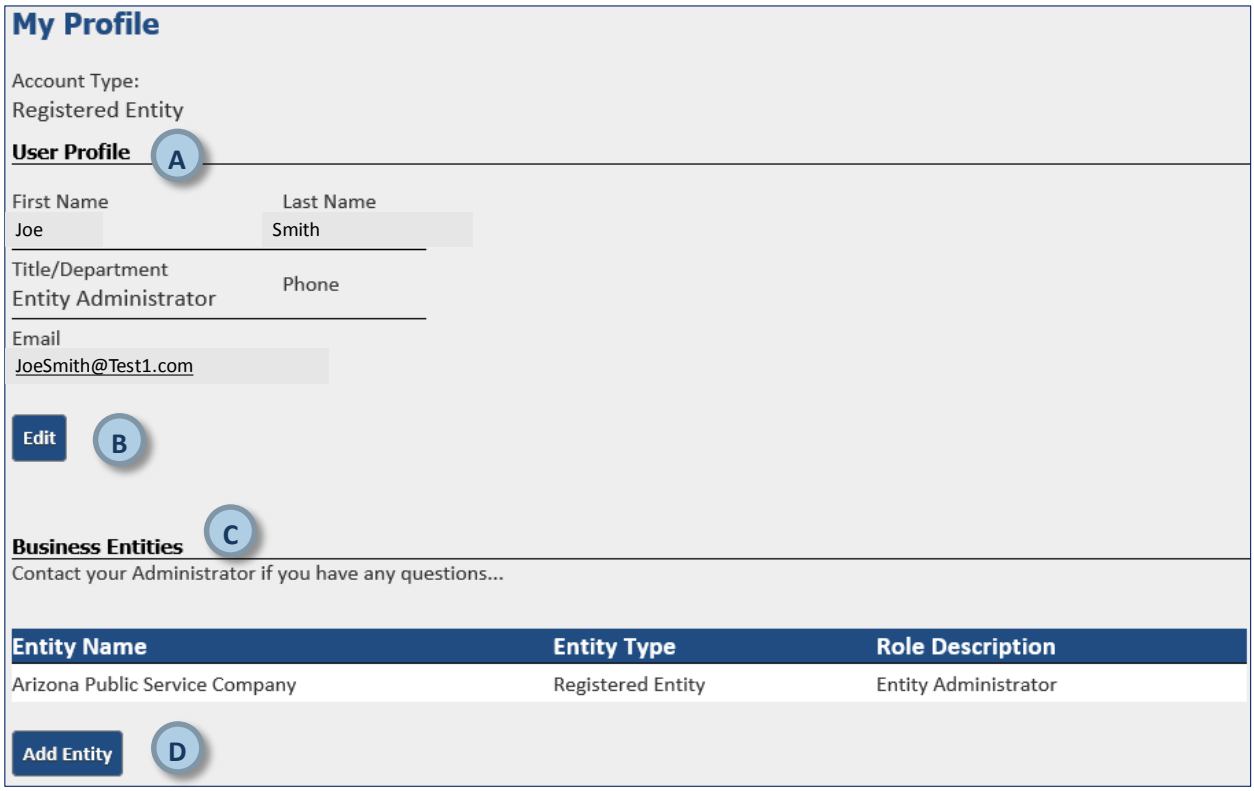

Figure 32: User Profile Management Screen

From here the user can:

A. View the **User Profile** (A) information.

B. Edit the **User Profile** information by clicking the **Edit** button (B).

C. View the listing of **Business Entities** (C) for which the user has access or has requested access.

D. Add an additional Business Entity request, by clicking the **Add Entity** (D) button.

Logging Out

To log out of the system, click the **Log Out** link (A) at the upper right of the BESNET system screen.

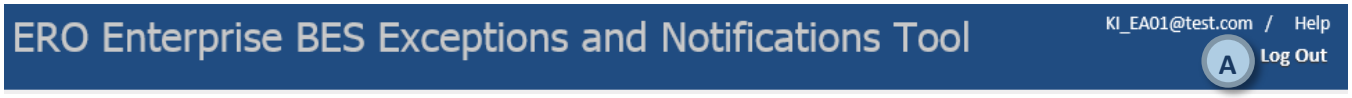

Figure 33: BESNet System Screen Header

Administrator User Account Management

Administrative User Management

The Administrator of a Registered Entity has the ability to vet new user account requests and manage users' roles within the Entity.

The Administrator will be notified by email of new user account requests.

To perform this function, on the **BESNet Dashboard** the Administrator should click **User** > **User Administration** pull-down menu (A).

Figure 34: BESNet Dashboard Header

Vetting New Users

On the **User Management Screen**, the Administrator will see a **Vet Requests** list, containing a listing of all users who have requested accounts associated with the Registered Entity for which the user has Administrative privileges.

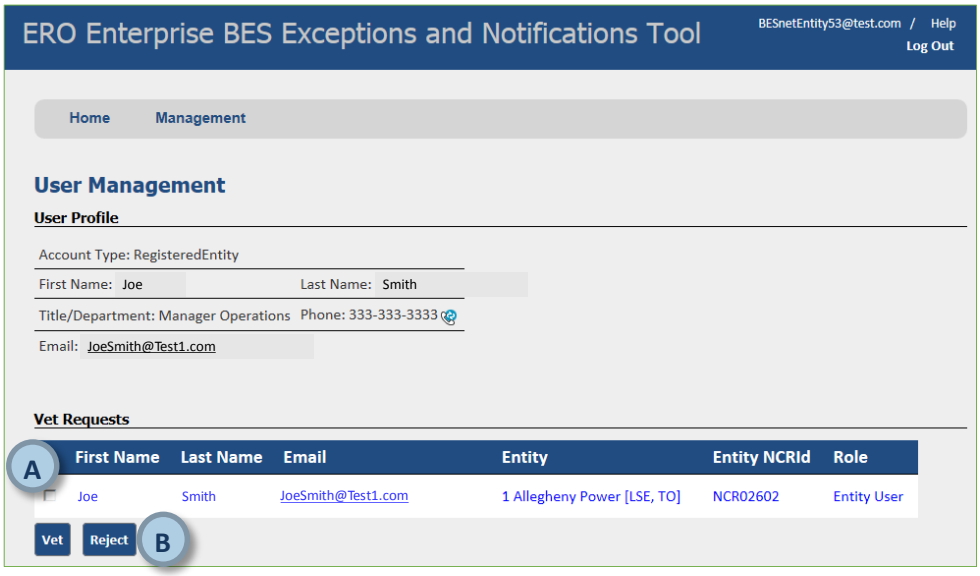

Figure 35: User Management Screen

A. Check the checkbox (A) next to each record to select it as one to approve or reject.

B. To approve the selected request(s), click the **Vet** button (A).

C. To reject the selected request(s), click the **Reject** button (B).

The decision to approve or reject the request will be e-mailed to the user.

User Role Management

The Administrator is responsible for management of the roles of all of the users within his purview.

A. To perform this function, on the **BESNet Dashboard** the Administrator should click **User** > **User Administration** pull-down menu (A). This will bring you to the User Management Screen

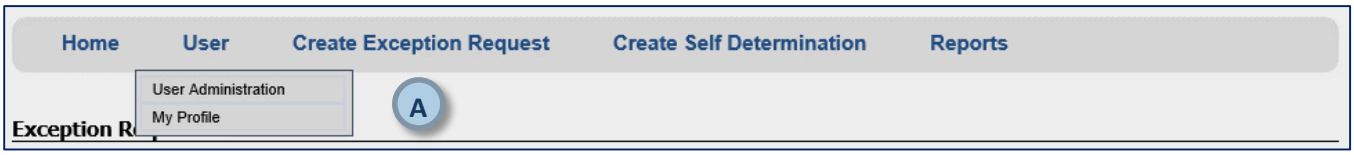

Figure 36: BESNet Dashboard Header

The **User Management** on the lower part of the **User Management Screen** displays a list of all users for which the user has Administrator privileges.

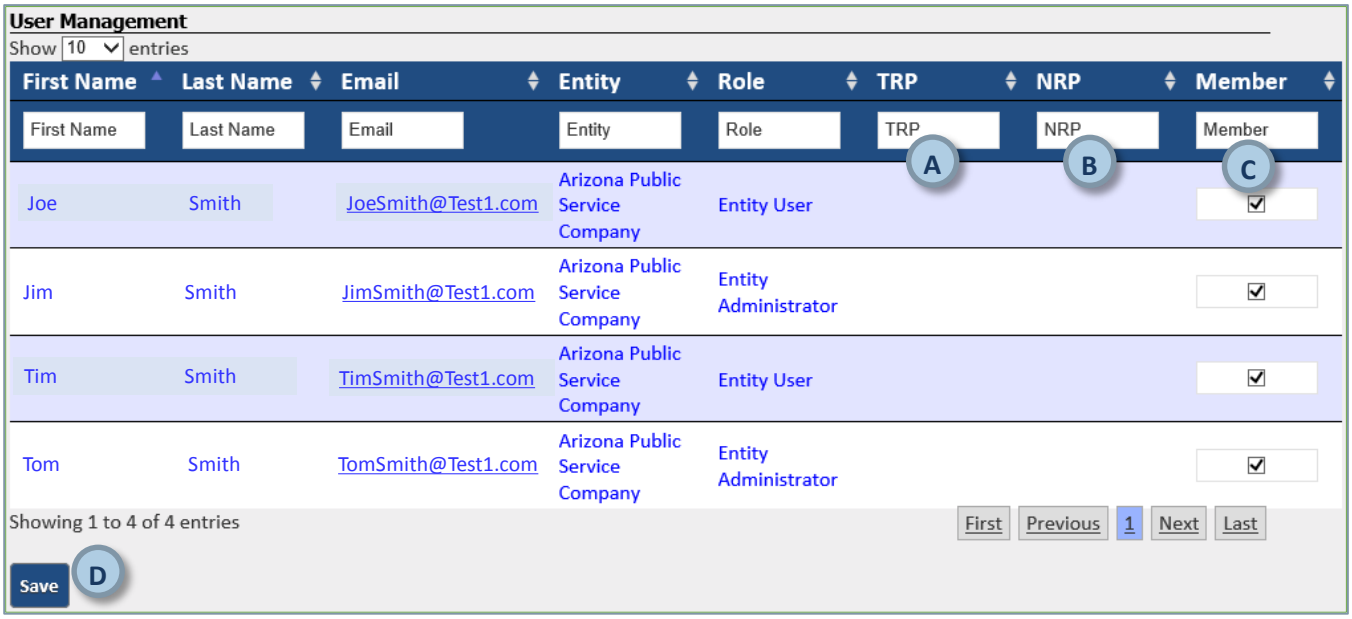

Figure 37: User Management Screen

A. The **Technical Review Panel** (TRP) membership can only be set by a **Regional Administrator**, and therefore cannot be set here.

B. The **NERC Review Panel** (NRP) membership can only be set by a **NERC Administrator**, and therefore cannot be set here.

C. To disassociate a user account from the Entity, uncheck the **Member** checkbox (C) for that account/Entity relationship. By default, all vetted members appear checked in the **Member** checkbox (C).

D. Once all the role changes have been made, click the **Save** button (D).

BESNet Dashboard Overview

The **BESNet Dashboard** is the home screen for the BESNet application. The Dashboard is displayed when a user first logs in and at any point when the **Home** link is pressed.

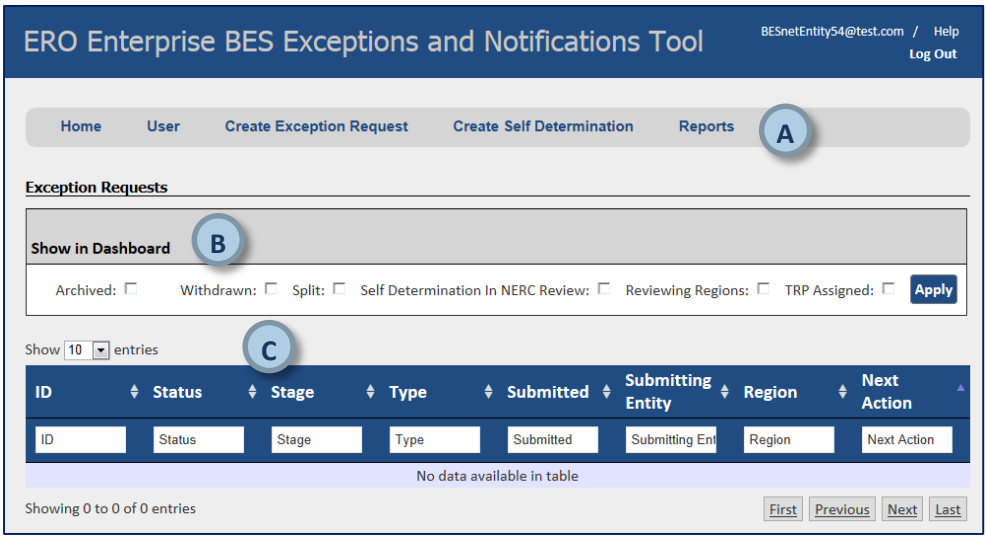

Figure 38: BESNet Dashboard

A. The **Dashboard navigation bar** (A) contains the following options:

   a. **Home:** Returns the user to the Dashboard

   b. **User:** Provides options for user management and account management.

   c. **Create Exception Request:** Starts the process for creating a new Exception Request.

   d. **Create Self-Determination:** Starts the process for creating a new Notification of Self-Determination.

   e. **Reports:** Contains options for reporting.

   NOTE: Some options may not appear, based on a user's role in the system.

B. The **Show in Dashboard** Filter (B). By default, Exception Requests that are archived or withdrawn, or that have been split and are therefore no longer active, do not appear in the Exception Requests listing. This filter allows the user to include any or all of these Exception Requests in the listing by checking the box next to the Exception Request state that should be included. These operate as follows:

   a. **Archived:** When checked, the dashboard will include Exception Requests that have been archived, cancelled, or terminated.

   b. **Withdrawn:** When checked, the dashboard will include Exception Requests that have been withdrawn; that is, those submitted to Initial Review, but then rescinded by the Submitting Entity.

   c. **Split:** When checked, the dashboard will include Exception Requests that have been split into one or more newer Exception Requests, and exist as a historical record.

      *NOTE: For more information about Split Exception Requests, see sections on **Splitting an Exception Request** or **Recertifying an Exception Request**.*

   d. **Self-Determination in NERC Review***: When checked, the dashboard will include any Notifications of Self-Determination that are awaiting NERC's review.*

C. The **Dashboard List** (C) contains a list of all **Exception Requests** and **Notifications of Self-Determination**. Here, the user can:

   a. Change the number of records that appear in the list, by changing the **Show in Entries** value.

   b. Change the display order of the entries in the list, by clicking on the header of each column.

   c. Filter the contents of the list, by entering text into the text boxes underneath each column header.

   d. Open a record, by clicking on the **Status** link.

   e. Navigate through the pages in the list, by clicking the navigation links to the bottom right of the listing.

Notifications of Self-Determination

Creating a Notification of Self-Determination

The BESNet application is the vehicle for officially notifying a Regional Entity of a self-determination of a change of status for an Element when applying the BES Definition.[1]

To start, click the **Create Self-Determination** pull-down (A) on the **Dashboard Menu**, and choose whether the Notification of Self-Determination is **For Inclusion** or **For Exclusion**. This will bring the user to the **Create Notification of Self-Determination Screen**.

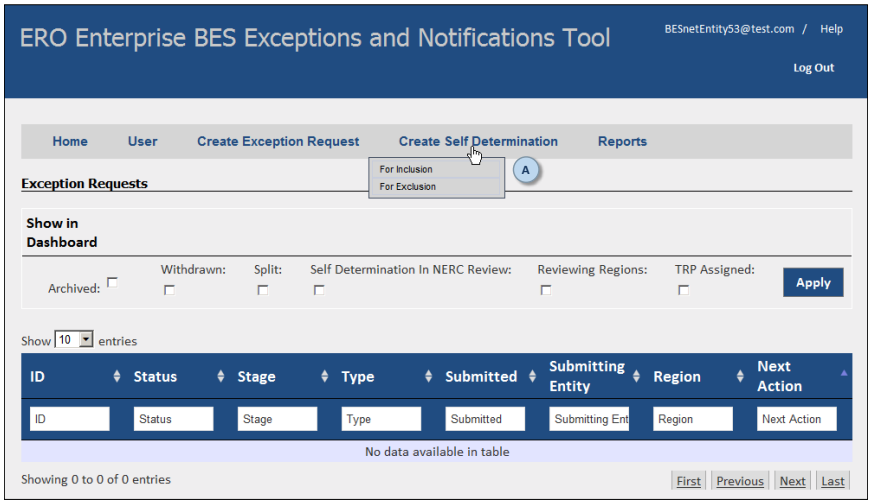

Figure 39: BESNet Dashboard

The **Create Notification of Self-Determination Screen** is broken into three sections for these instructions.

Create Notification of Self-Determination Screen Section 1: General Information

Section 1 contains **General Information (A)** about the Submitting Entity, pre-populated from the user information.

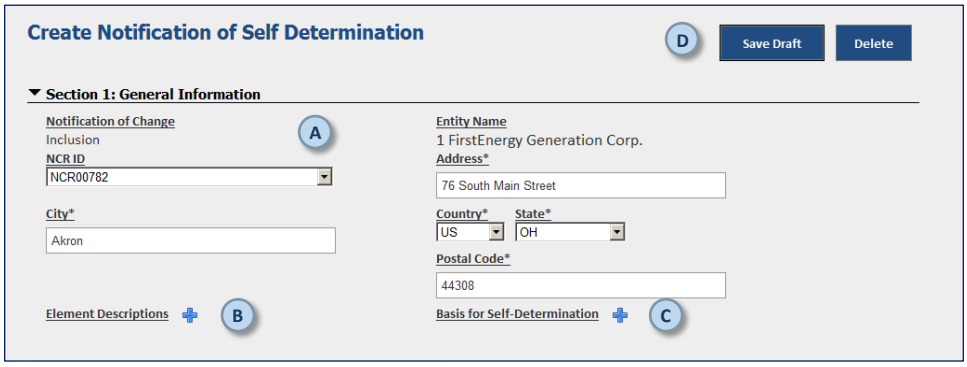

Figure 40: Create Notification of Self-Determination Screen Section 1

Basic information about the Submitting Entity (i.e., the Entity with which the user is operating) can be edited here, including the Address, City, Country, State, and Postal Code.

Section 1 also has two sub-sections about the Notification for:

A. The **Element Description** (B) and the **Basis for Self Determination** (C)

[1] Refer to the *BES Definition Reference Document* and the *BES Notification Review Guidelines* at: http://www.nerc.com/pa/RAPA/Pages/BES.aspx

B. **Save Draft** and **Delete** buttons (D) that can be used at any time.

NOTE: The BESNet application automatically saves a draft of the Notification if the browser is closed or the session is interrupted.

Selecting Element Description

NOTE: A Notification can contain more than one Element, but all Elements in the Notification should be of the same type and should be Included or Excluded for the same reasons.

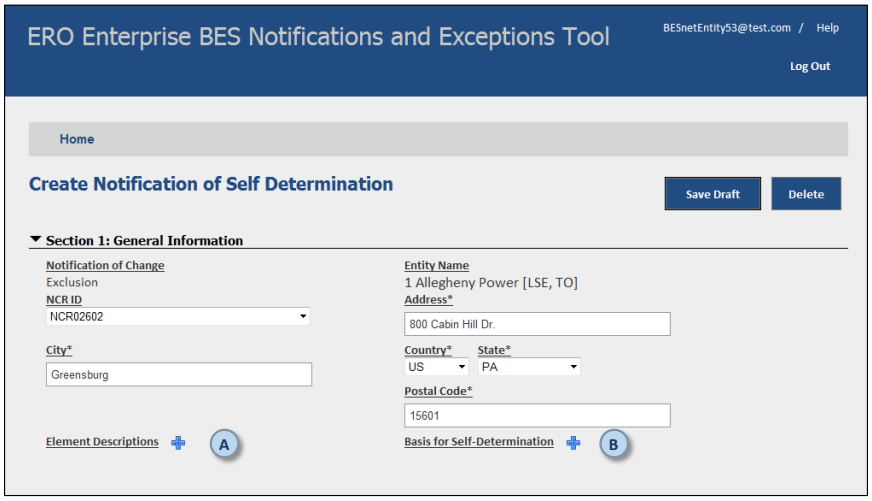

Figure 41: Element Description and Basis for Self-Determination

The user must select the **Element Description**. To do so, click on the blue **Plus Sign** at the **Element Descriptions** (A). This will bring the user to the **Add Element Description Screen**.

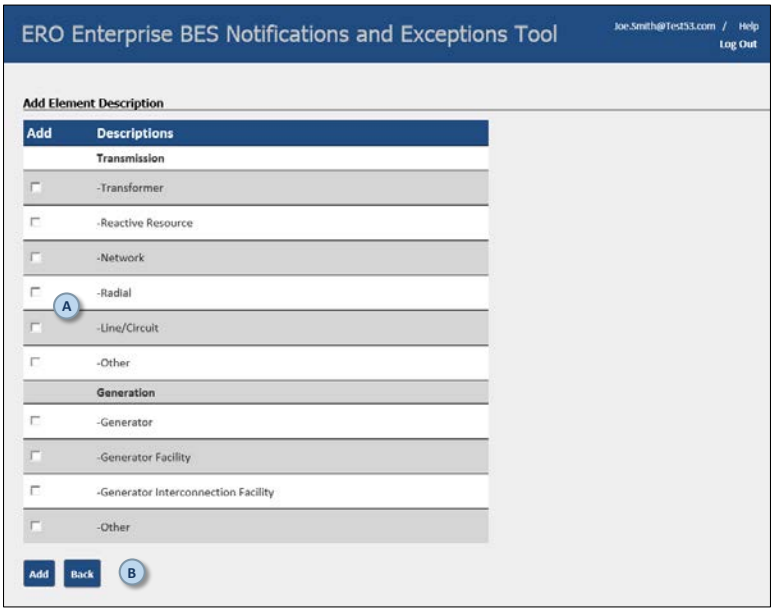

Figure 42: Add Element Description Screen

The user should select the appropriate **Element Description** for which the Notification of Self-Determination is being submitted (A), and click on **Add** (B) to complete the action. This will return the user to the **Create Notification of Self-Determination Screen**.

Selecting Basis for Self-Determination

NOTE: A Notification can contain more than one Element, but all Elements in the Notification should be of the same type and should be Included or Excluded for the same reasons.

The user must select the BES Definition reason for the Element's inclusion or exclusion. To do so, click on the blue **Plus Sign** at the **Basis for Self-Determination** (B). This will bring the user to the **Add BES Definition Screen**.

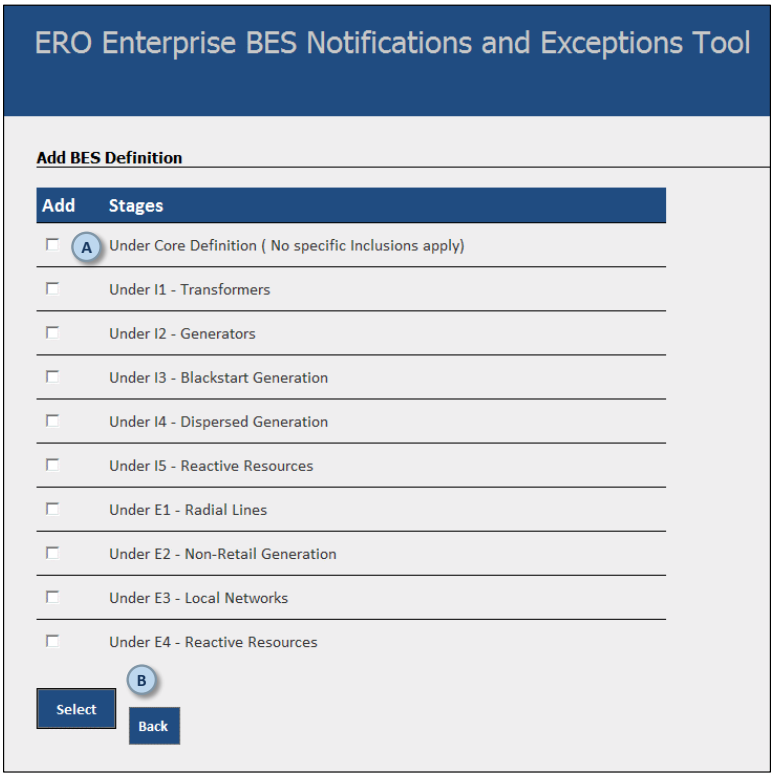

Figure 43: Add BES Definition Screen

The user should select the appropriate BES Definition reason that the Element is being included or excluded and for which the Notification of Self-Determination is being submitted (A), and click on **Add** (B) to complete the action. This will return the user to the **Create Notification of Self-Determination Screen**.

Removing an Element Description or Basis for Self-Determination

Once the Basis for Self-Determination is selected, the **Create Notification of Self-Determination Screen** will show **Red X's** (A) near the **Element Description** and **Basis for Self-Determination** areas on the screen.

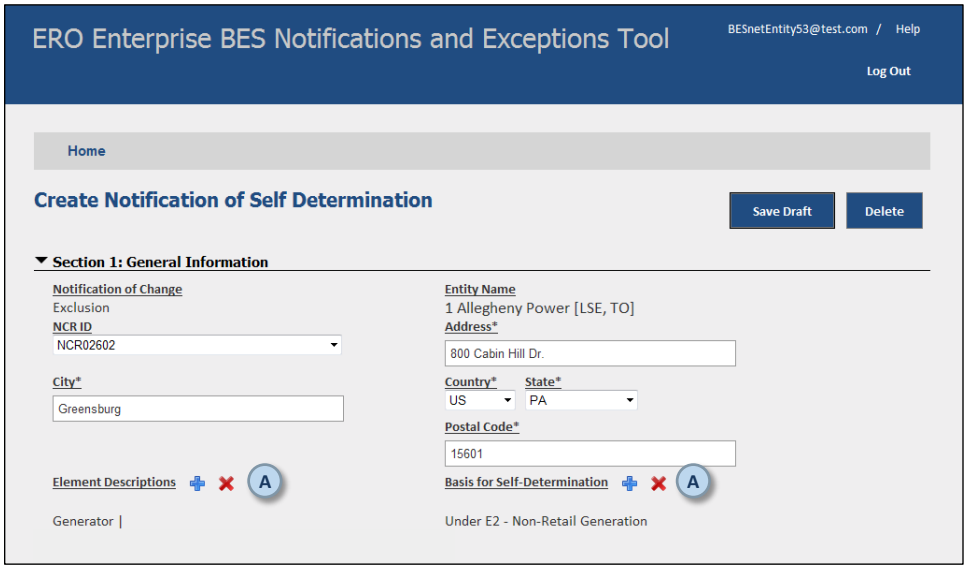

Figure 44: Create Notification of Self-Determination Screen

If either the Element Description or Basis for Self-Determination is incorrect or should be removed, click on the **Red X**. This will bring the user to the appropriate removal screen (Figure 45, **Remove Element Description Screen,** used as an example).

The user should check the box of the **Description** (A) to be removed and then click on the Remove button (B) to complete the action. This will return the user to the **Create Notification of Self-Determination Screen**.

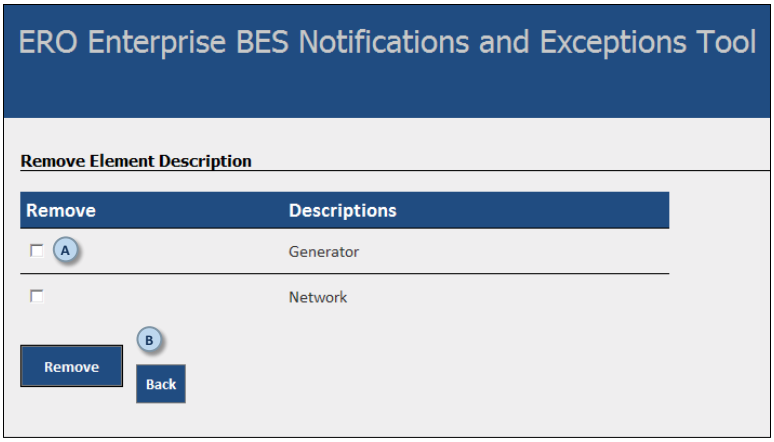

Figure 45: Remove Element Description Screen

Create Notification of Self-Determination Screen Section 2: Detailed Information

The **Detailed Information Section 2** contains information for the **Submitting Entity Contact Information** (A), and the Entity's authorized representative that is certifying the Notification of Self-Determination.

The user must enter:

A. The **Submitting Entity Contact Information** (A)

B. The **Authorized Representative's Name and Title** (B).

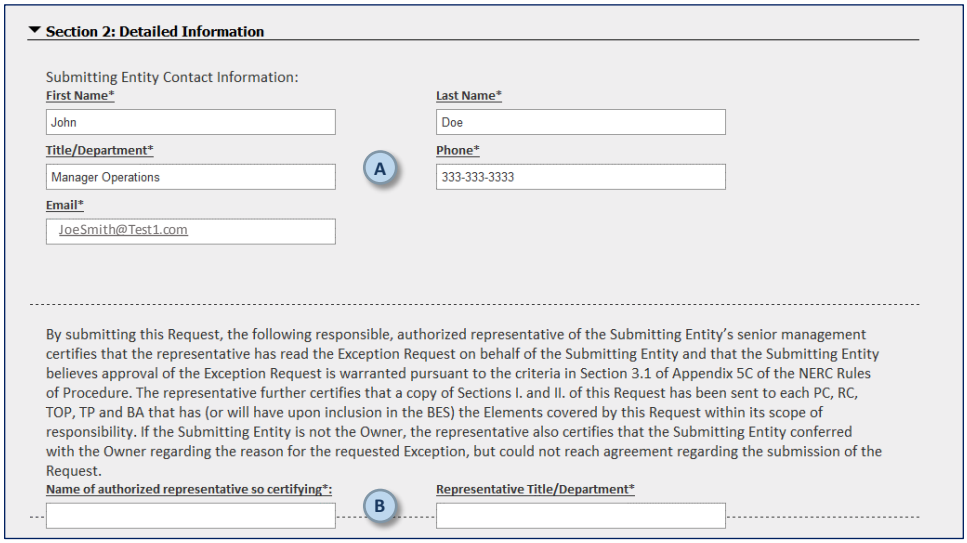

Figure 46: Create Notification of Self-Determination Screen Section 2

Adding an Element to a Notification of Self-Determination

Once the general information is entered in Sections 1 and 2 for the Notification on the **Create Notification of Self-Determination Screen**, the user should click on the **Add** button, which will take you to the **Add Element Screen.**

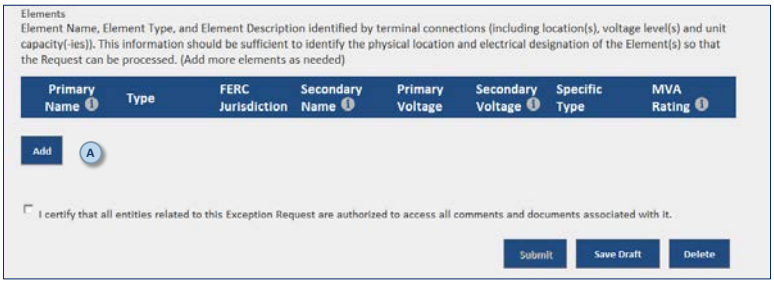

Figure 47: Create Notification of Self-Determination Screen – Add Element Screen

Several functions are performed through the Add Element Screen:

A. The **Element Type** (A) has a pull-down menu (B) allowing selection of the type of Element.

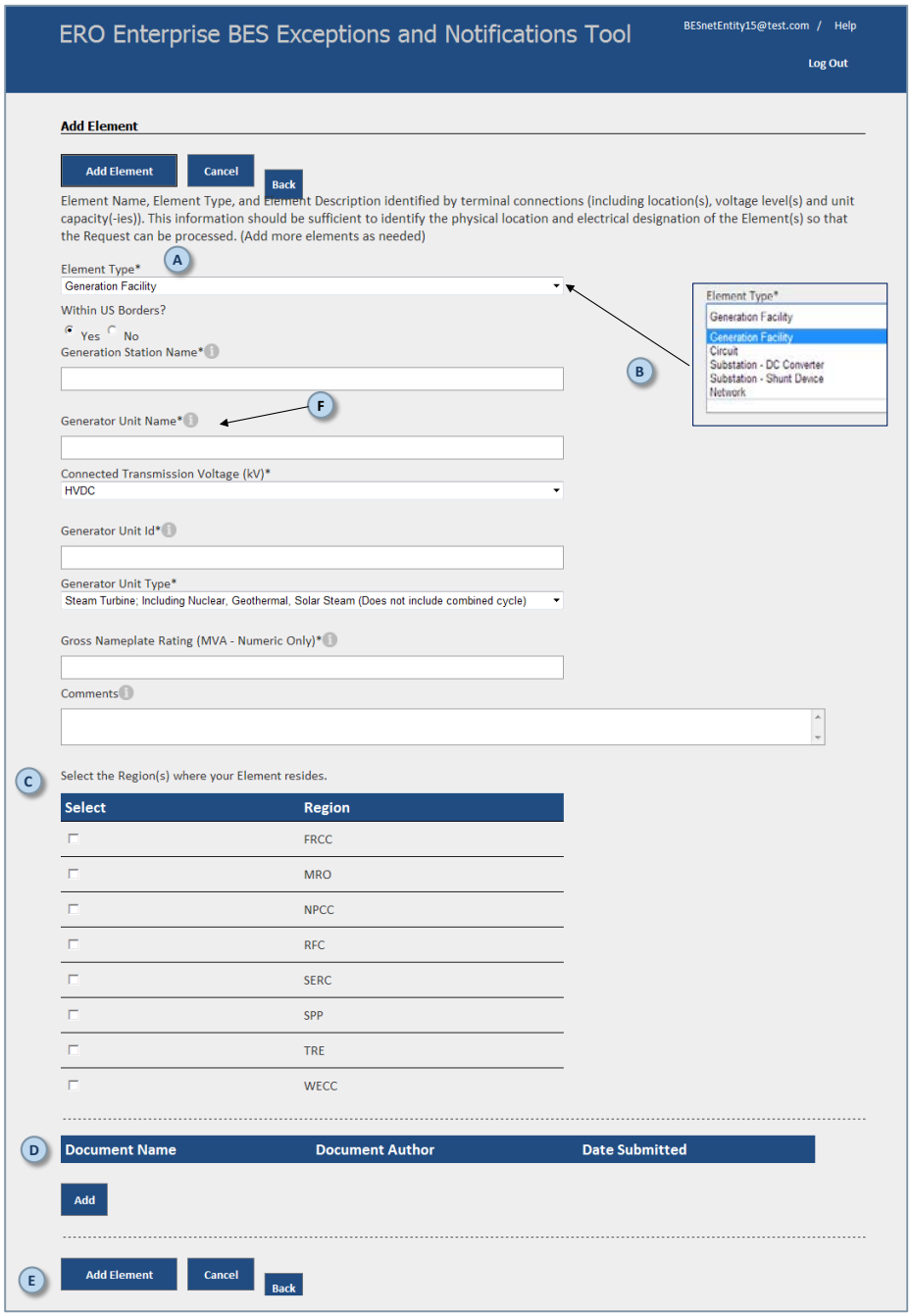

Figure 48: Add Element Screen

B. The user should select the **Element Type** from the pull-down menu (B), which will display data entry screens specific to that **Element Type**. Additional information on the types is in the **Element Type** section of this document.

C. The Region(s) where the Element resides is selected in the **Select the Region** area (C)—multiple Regions can be selected.

D. Attach necessary documentation[2] by clicking on the **Add** button (D). Additional guidance on adding documents is included in the Adding Documents section of this guide.

NOTE: At least one (1) supporting document is required for each Element in a Notification of Self-Determination.

E. Click on the **Add Element** button (E) when finished entering data for the Element to complete its addition to the Notification. That action will return the user to the **Create Notification of Self-Determination Screen**, where all Elements that are part of the Notification are displayed.

F. Informational points are denoted by an "i" (F) throughout the **Add Element Screens**. Hovering over them will reveal additional information about the item.

Element Types

When adding an Element to a Notification of Self-Determination, the fields to be completed vary by Element. Screenshots of each Element's properties are provided below for reference.

Table 1 shows the types of Elements listed in the **Element Type** pull-down menu (A) on the **Add Element Screen**.

Table 1: Element Types

	Within FERC Jurisdiction	Name(s)	Voltage (kV)	ID	Specific Type	MVA Rating	Comments
Generation Facility	Yes or No, Required	Generation Station Name, Required; Unit Name, Required	Connected AC Transmission Voltage, Required, from a list of values	Unit ID, Required	Required, from a list of Generator Unit Types	Gross Nameplate Rating, Required	Optional
Circuit	Yes or No, Required	From Point Name, Required; To Point Name, Required; Common Element Name, Required	From Point kV, Required, from a list of values; To Point kV, Required, from a list of values	Circuit ID, Optional	Required, from a list of Circuit Types	Normal Rating, Optional	Optional
Substation, DC Converter	Yes or No, Required	Converter Name, Required	Connected AC Transmission Voltage, Required, from a list of values	N/A	N/A	Normal Rating, Optional	Optional
Substation, Shunt Device	Yes or No, Required	Network Name, Required; Device Name, Required	Station kV, Required, from a list of values	N/A	Device Type	Normal Rating (MVA or MVAR), Optional	Optional
Network	Yes or No, Required	Network Name, Required	Connected AC Transmission Voltage, Required, from a list of values	N/A	N/A	N/A	Optional

[2] Refer to the *BES Notification Review Guidelines* for additional information on necessary documentation.

Add a Generation Facility

If the user clicks on the **Generation Facility** in the **Element Type** section of the **Add Element Screen**, the following **Generation Facility** Screen appears:

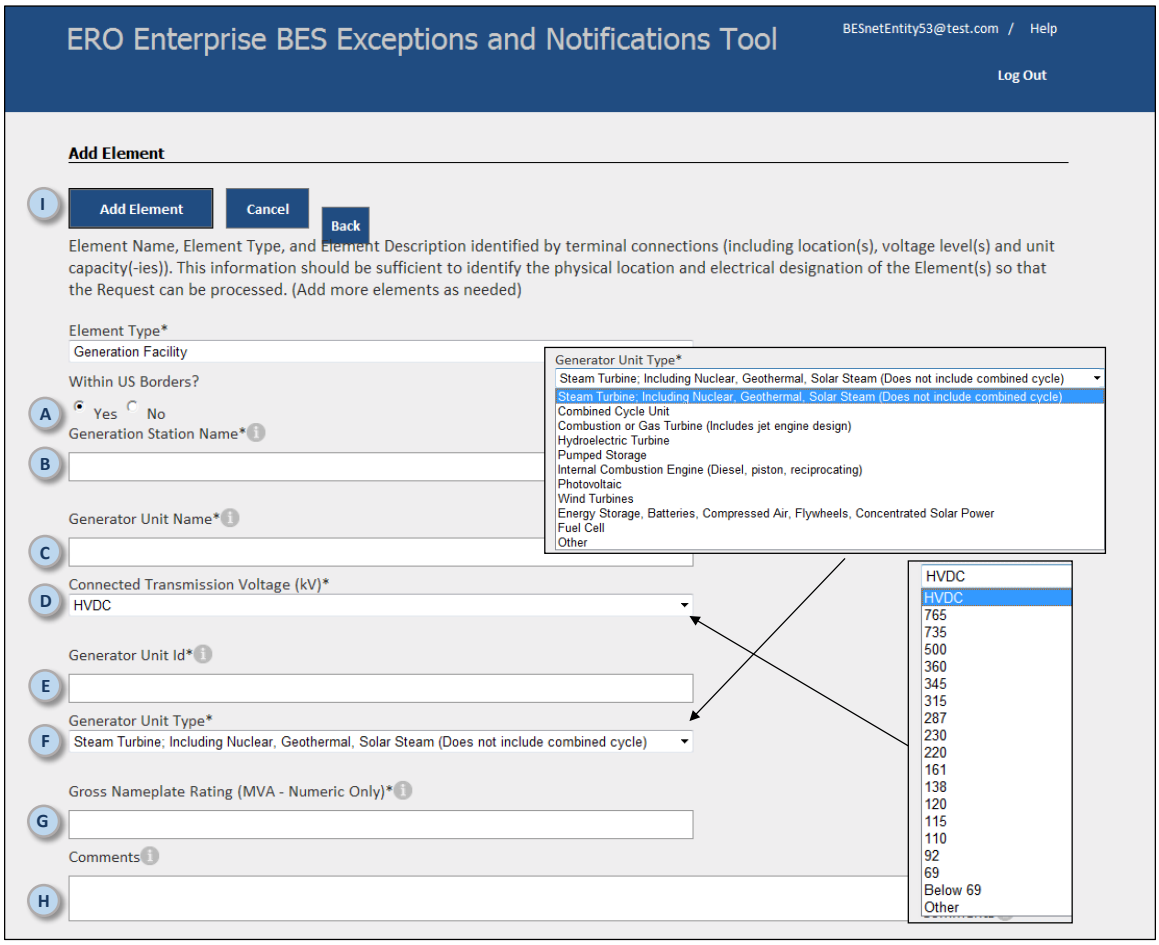

Figure 49: Add Generation Facility Screen

A. Select whether the **Generation Facility** is within the U.S. Borders (A).

B. Provide the **Generation Station Name** (B).

C. Provide the **Generator Unit Name** (C).

D. Select the **Connected Transmission Voltage** (D) from the pull-down list.

E. Provide the **Generator Unit ID** (E).

F. Select the **Generator Unit Type** from the pull-down list.

G. Provide the **Gross Nameplate Rating** in MVA (G). One decimal point is allowed.

H. Provide **Comments** (H) if desired.

I. Click on the **Add Element** button (I) to save the information. This will bring the user to the **Create Notification of Self-Determination Screen**.

Add a Circuit

If the user clicks on the **Generation Facility** in the **Element Type** section of the **Add Element Screen**, the following **Circuit Screen** appears:

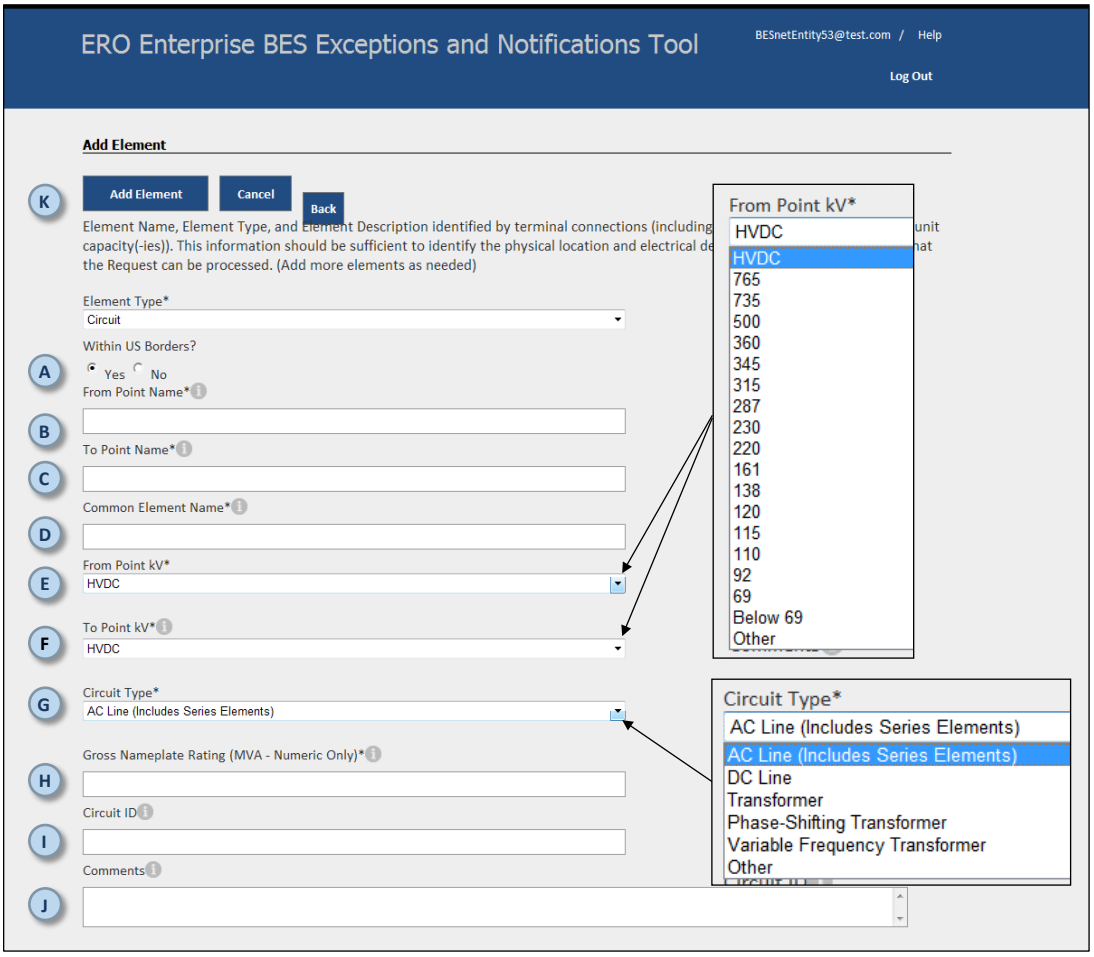

Figure 50: Add Circuit Screen

A. Select whether the **Circuit** is within the U.S. Borders (A).

B. Provide the **From Point Name** (B).

C. Provide the **To Point Name** (C).

D. Provide the **Common Element Name** (D) for the **Circuit**.

E. Select the **From Point kV** (E) from the pull-down list.

F. Select the **To Point kV** (F) from the pull-down list.

G. Select the **Circuit Type** (G) from the pull-down list.

H. Provide the **Gross Nameplate Rating** in MVA of the **Circuit** (H). One decimal point is allowed.

I. Provide the **Circuit ID** (I).

J. Provide **Comments** (J) if desired.

K. Click on the **Add Element** button (I) to save the information. This will bring the user to the **Create Notification of Self-Determination Screen**.

Add a DC Converter

If the user clicks on **Substation – DC Converter** in the **Element Type** section of the **Add Element Screen**, the following **Circuit Screen** appears:

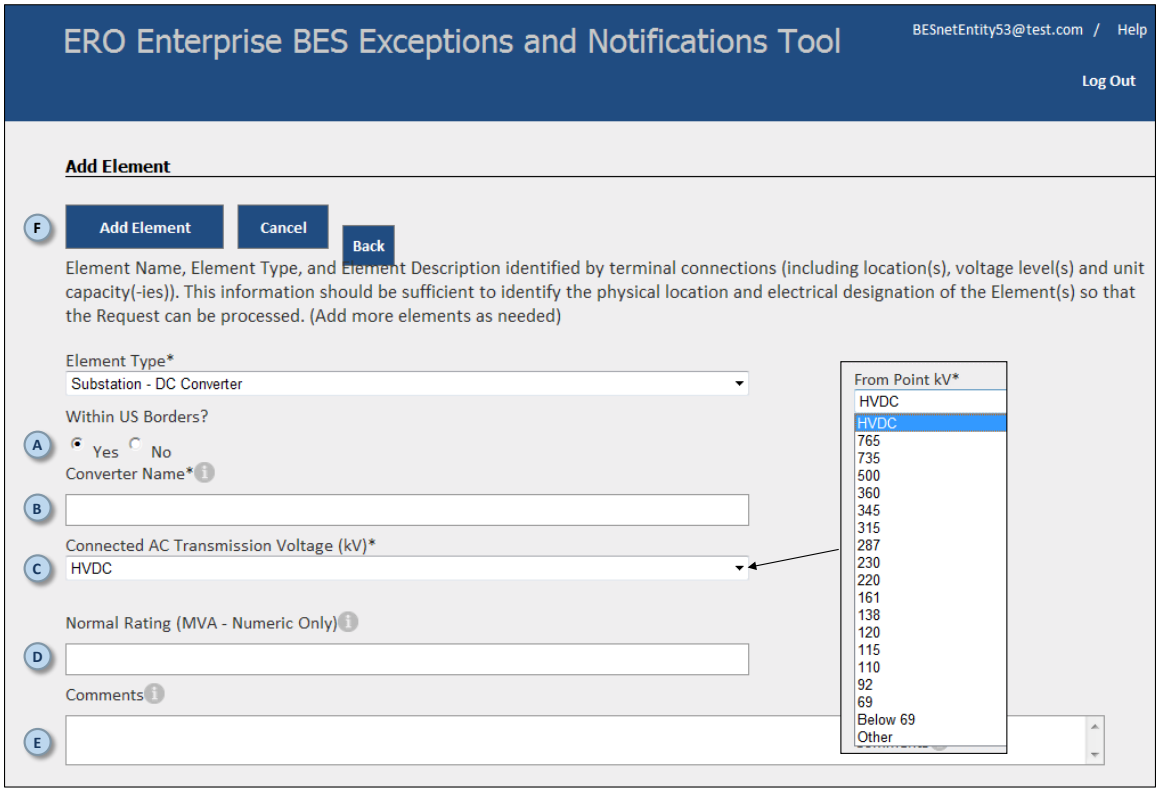

Figure 51: Add DC Converter Screen

A. Select whether the **DC Converter** is within the U.S. Borders (A).

B. Provide the **Converter Name** (B).

C. Select **HVDC** as the **Connected AC Transmission Voltage** (C) from the pull-down list.

D. Provide the **Normal Rating** in MVA for the **DC Converter** (D). One decimal point is allowed.

E. Provide **Comments** (E) if desired.

F. Click on the **Add Element** button (F) to save the information. This will bring the user to the **Create Notification of Self-Determination Screen**.

Add a Substation Shunt Device

If the user clicks on the **Substation – Shunt Device** in the **Element Type** section of the **Add Element Screen**, the following **Shunt Device Screen** appears:

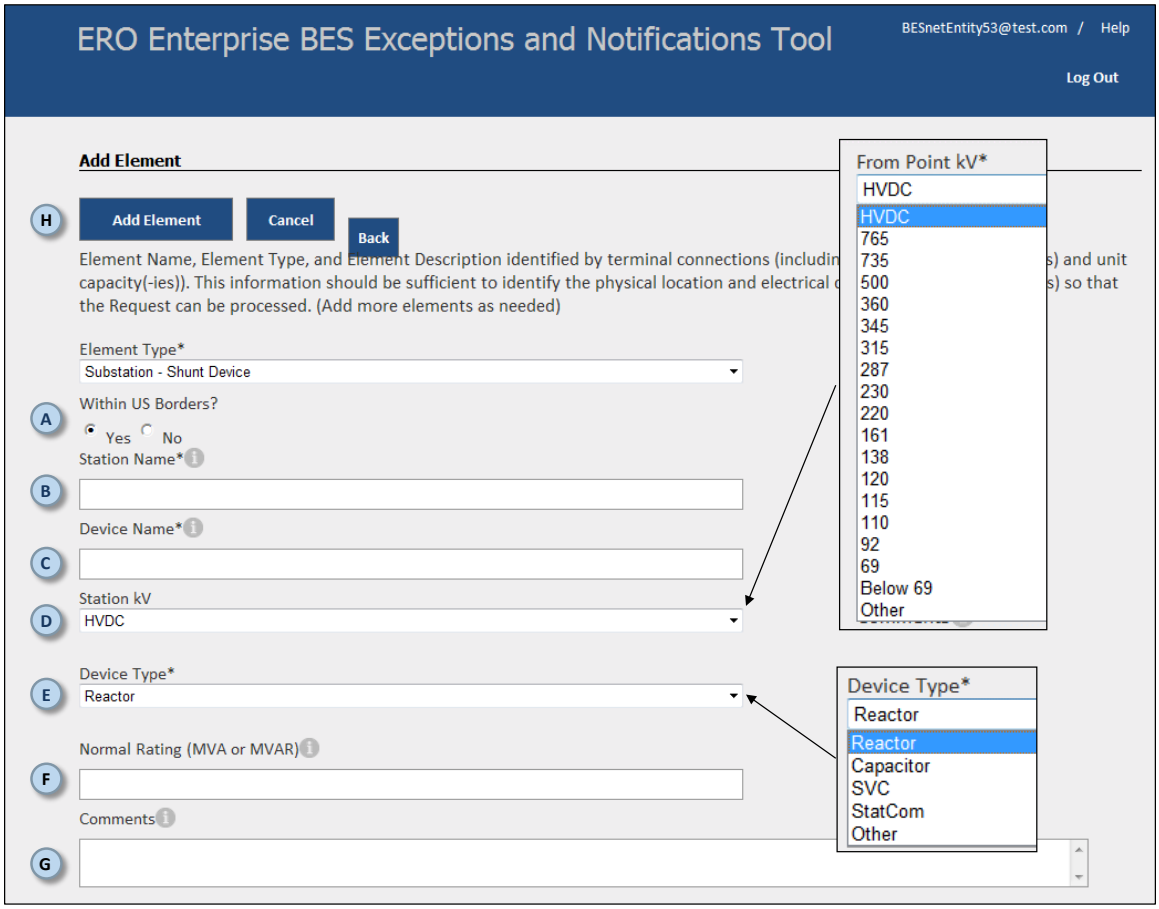

Figure 52: Add Shunt Device Screen

A. Select whether the **Shunt Device** is within the U.S. Borders (A).

B. Provide the **Station Name** (B) where the device is located.

C. Provide the **Device Name** (C).

D. Select the **Station kV** (D) from the pull-down list.

E. Select the **Device Type** (E) from the pull-down list.

F. Provide the **Normal Rating** in MVA for the **Device** (F). One decimal point is allowed.

G. Provide **Comments** (G) if desired.

H. Click on the **Add Element** button (H) to save the information. This will bring the user to the **Create Notification of Self-Determination Screen**.

Add a Network

If the user clicks on the **Network** in the **Element Type** section of the **Add Element Screen**, the following **Network Screen** appears:

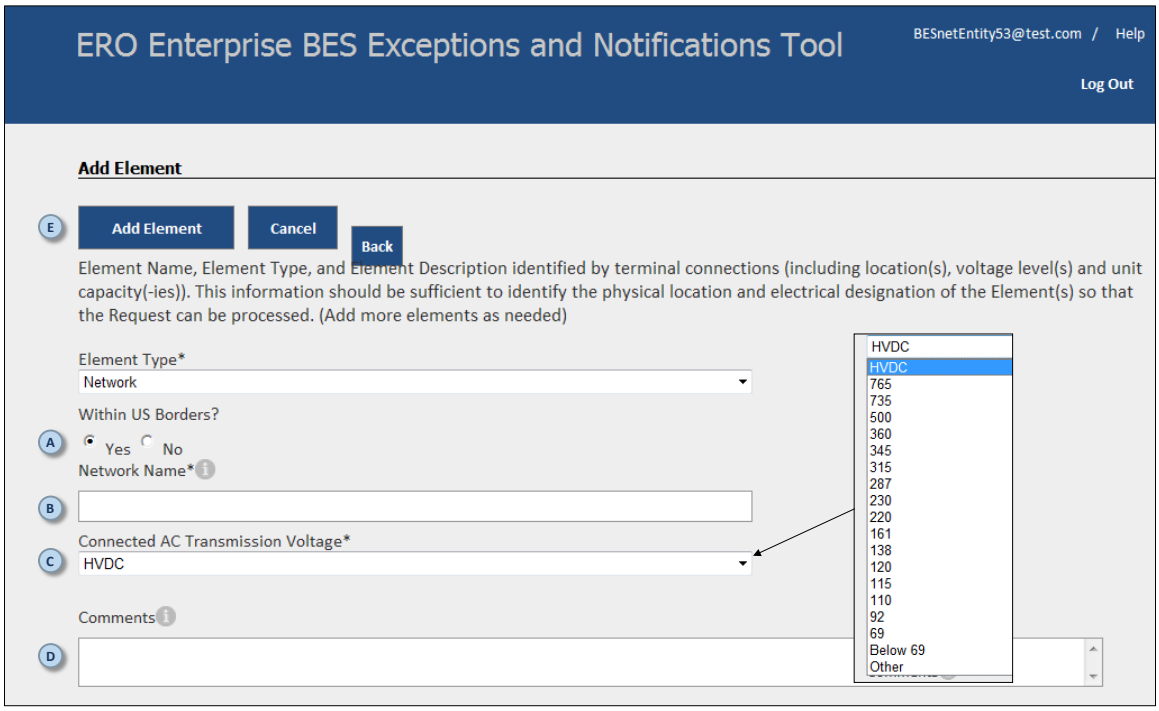

Figure 53: Add Network Screen

A. Select whether the **Network** is within the U.S. Borders (A).

B. Provide the **Network Name** (B).

C. Select the **Connected AC Transmission Voltage** (C) from the pull-down list.

D. Provide **Comments** (D) if desired.

E. Click on the **Add Element** button (E) to save the information. This will bring the user to the **Create Notification of Self Determination Screen**.

Selecting a Region for the Element

The user must select the Region(s) in which the Element of the Self-Determined Notification is located. Multiple Regions can be selected for Circuits.

Figure 54: Select Region(s) Section of Add Element Screen

Add Supporting Documentation for the Element

At least one supporting document[3] must be supplied for each Element in the Notification. To add a document, click the **Add** button in the Document section of the **Add Element Screen** (A). This will take you to the **Add Element Document Screen.**

Figure 55: Document Section of Add Element Screen

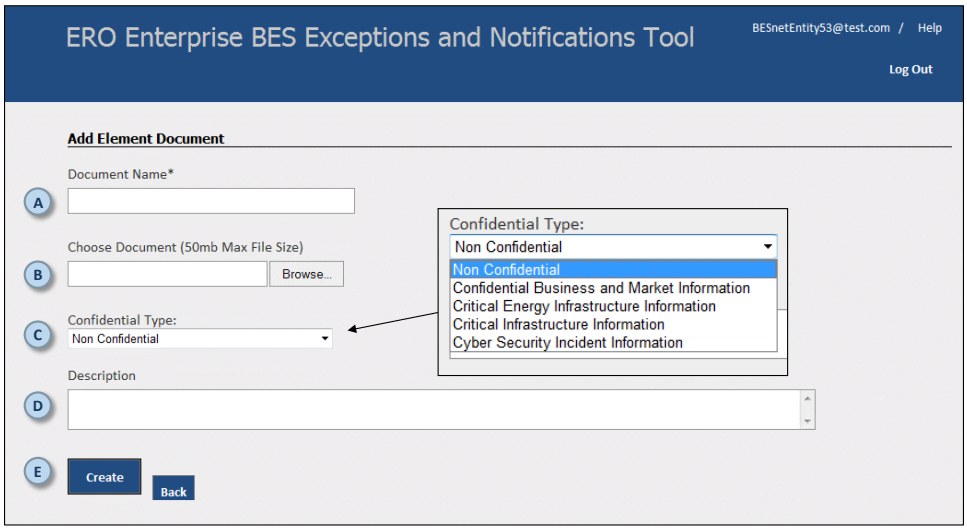

Figure 56: Add Element Document Screen

A. Provide a **Document Name** (A) for the document being attached.

B. Select a document using the **Choose Document** browsing area (B). NOTE: There is a 50 MB file size limit.

C. Select a **Confidential Type** (C) from the pull-down list.

D. Provide a **Description** (D) for the document.

E. When the **Add Element Document** form is completed, click on the **Create** button to attach the document to the Element. This will take the user back to the **Add Element Screen**

Figure 57: Add Element Screen Showing Attached Document

[3] Refer to the *BES Notification Review Guidelines* for additional information on necessary documentation.

When the supporting documentation has been attached to the Notification, the **Add Element Screen** will show that the **Document** (A) is attached to the Element. If additional files need to be attached as supporting documentation, the user should click on the **Add button** (B) and the **Add Document Screen** will appear again.

Certifying the Notification of Self-Determination

Before submitting the Notification of Self-Determination, the Notification must be certified by an authorized representative of the Entity. To do this, the representative's name and title must be entered on the **Create Notification of Self-Determination Screen** at (A).

The user must then select the **Certification** checkbox (B) before submitting the Notification.

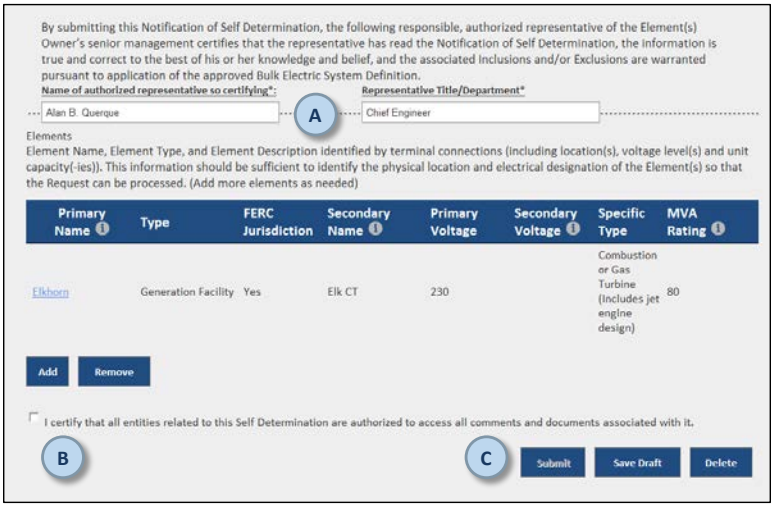

Figure 58: Create Notification of Self Determination Screen

Submitting the Notification of Self-Determination

To Submit the Notification of Self-Determination, the user should click on the **Submit button** (C) on the **Create Notification of Self-Determination Screen.** The user also has the option to **Save Draft** to allow the user to return to complete the draft Notification at a later time, as well as **Delete** to allow the user to completely delete the draft Notification.

The user will be returned to the **BESNet Dashboard** (Figure 59), showing that the submitted Notification is in Regional Review (A below). The **ID** for the Notification will also be complete with year, Region, NCR, and the SD number—SD indicating that the item is a Self-Determined Notification.

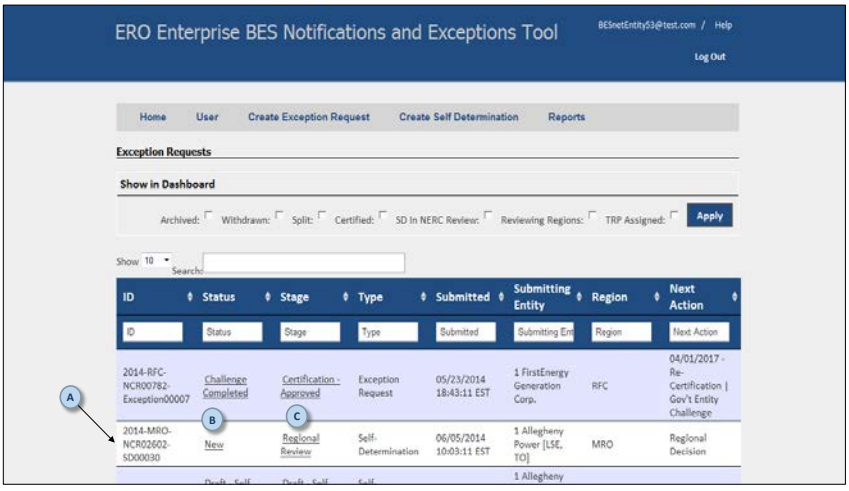

Figure 59: BESNet Dashboard with Self-Determined Notification in Regional Review