

# TADS 2022 Multi-Owner Inventory (Form 2.x) Update Instructions

## Update Summary and Background

This update to TADS is intended to improve user functionality and data quality. It creates a link and associated validations between Form 2.x data and Form 3.x data. As part of the implementation, any accurately entered Form 2.x data should automatically link with the associated element. Additionally, several user enhancements have been made to the Form 2.x user interface to better assist in submitting the data. The update does not change how Form 3.x data should be reported.

## Who Should Report What for Multi-Owner Inventory?

TADS reportable elements with multiple NERC registered owners should be reported by all registered partial owners under Form 2.x. **Only one entity should be reporting the element-associated events/outages in Forms 4.x and 5.** This entity is referred to as the Reporting Transmission Owner (TO). This is unchanged from before this update. It is optional for non-reporting TOs to report the element in Form 3.x.

Multi-Owner inventory where only one owner is a NERC registered entity and others are non-registered entities does not need to be reported in Form 2.x, as only one of the owners would be in the system.

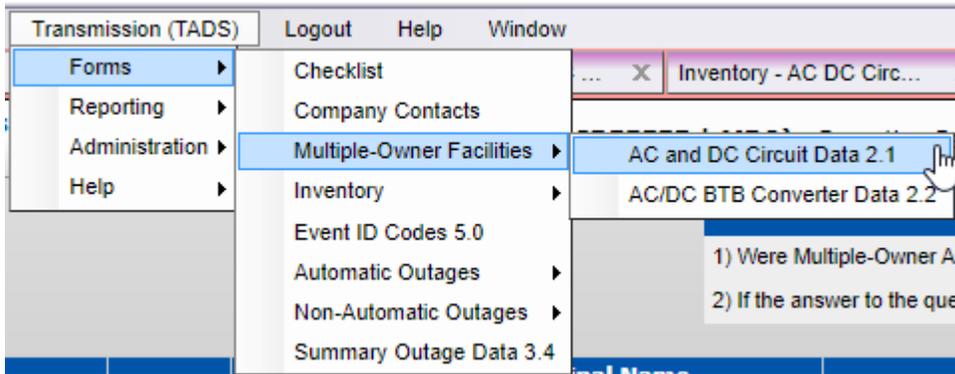
## How to Add New Multi-Owner Inventory Reporting TO Instructions

1. Ensure that the Reporting TO has added the element to their Form 3.x inventory data. If needed, instructions on adding elements to Form 3.x can be found in the Training and/or Data Reporting Instructions found on the same webpage as this document.

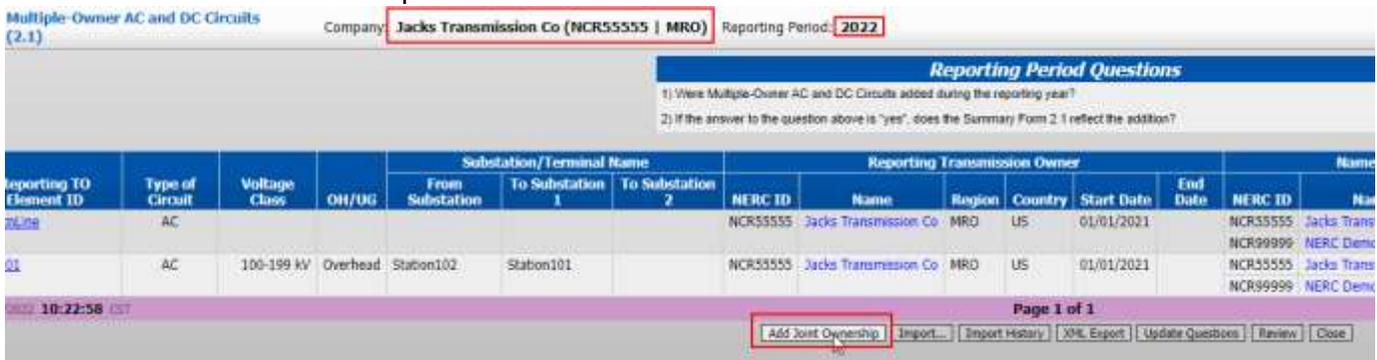
**Inventory - AC DC Circuit Detail (3.1)** Company: **Jacks Transmission Co (NCR55555 | MRO)** Reporting Period: **2022**

Element Identifier	From Bus	To Bus	Tertiary Bus (For 3-Terminal Lines)	Circuit Mileage	Bulk Electric System Exempted	Number of Terminals	Circuit Type	kV	Precursor Elements	Conductors Per Phase
<a href="#">BigMountainLine</a>	BigMountain	LittleMountain		52.000		2	ACO - AC Overhead	200-299 kV		
<a href="#">Line101</a>	Station102	Station101		2.100		2	ACO - AC Overhead	100-199 kV		
<a href="#">BostonNewYork</a>	Boston	NewYork		217.000		2	ACO - AC Overhead	300-399 kV		

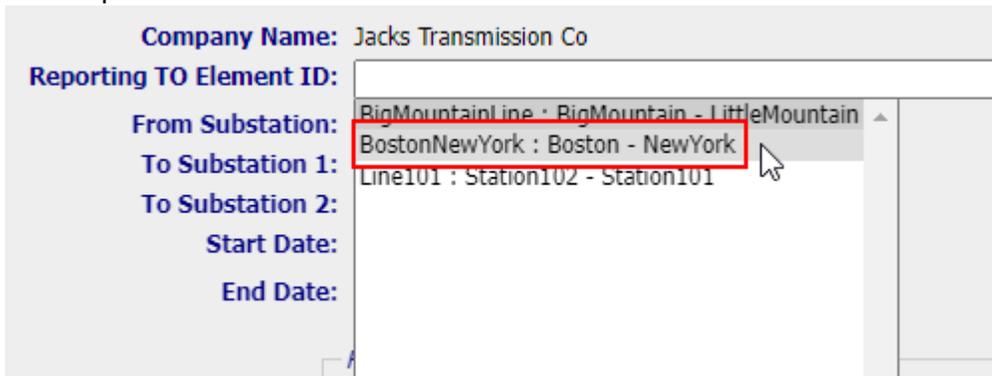
2. The Reporting TO will need to navigate to the associated Form 2.x; 2.1 for AC and DC circuits, 2.2 for AC/DC back-to-back converters.



3. Check that the Company and Reporting Period filters are set to the Reporting TO and current year, then click “Add Joint Ownership”.



4. Click in the “Reporting TO Element ID” box and select the element that has multiple owners from the dropdown. The box also acts as a search bar for entities with numerous elements.



5. The inventory fields will automatically populate for the selected element, based on the data entered in Form 3.x.



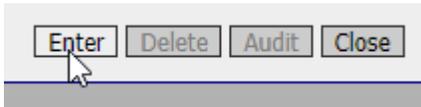
6. Enter the date the shared ownership agreement was implemented into the “Start Date” field.



7. Select the other owner in the NERC ID dropdown, the text box also acts as an NCR number search bar. If there are more than two owners click the + button on the right to add more owners.

NERC ID	Name	Region	Country	TO Element ID
NCR5555	Jacks Transmission Co	MRO	US	BostonNewYork
NCR9999	NERC Demo Company			
NCR999999 : NERC Demo Company				

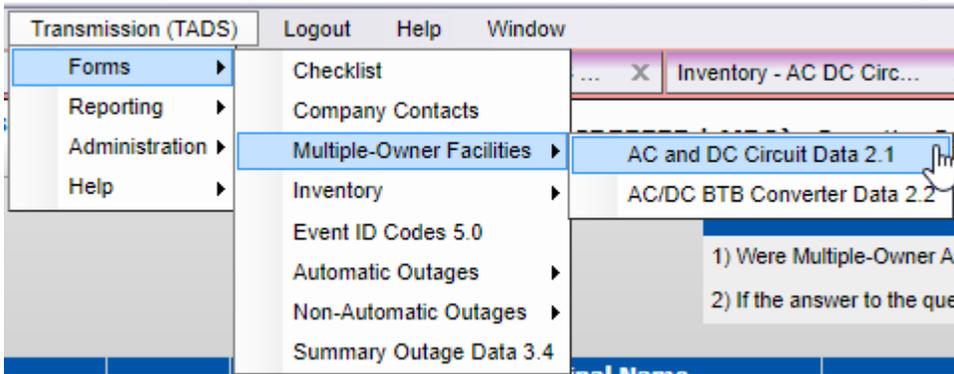
8. Click "Enter".



9. Communicate with other owners that the element has been added.

### Non-Reporting TO Instructions

1. Once the Reporting TO has added the inventory to their Form 2.x, navigate to the associated form.



2. Confirm that the element is appearing as it should be.

**Multiple-Owner AC and DC Circuits (2.1)** Company: **NERC Demo Company (NCR99999 | MRO)** Reporting Period: **2022**

1) Were Multiple-Owner AC and DC Circuits  
2) If the answer to the question above is "y

Reporting TO Element ID	Type of Circuit	Voltage Class	OH/UG	Substation/Terminal Name			NERC ID	Name
				From Substation	To Substation 1	To Substation 2		
<a href="#">BigMtnLine</a>	AC						NCR55555	Jacks Transmissi
<a href="#">Line101</a>	AC	100-199 kV	Overhead	Station102	Station101		NCR55555	Jacks Transmissi
<a href="#">BostonNewYork</a>	AC	300-399 kV	Overhead	Boston	NewYork		NCR55555	Jacks Transmissi

09/22/2022 10:38:30 CST

3. Open the record in Form 2.x by clicking on it.

**OATI Multiple-Owner AC and DC Circuits (2.1)** Company: NERC Dem

Reporting TO Element ID	Type of Circuit	Voltage Class	OH/UG	From Substation
<a href="#">BigMtnLine</a>	AC			
<a href="#">Line101</a>	AC	100-199 kV	Overhead	Station102
<a href="#">BostonNewYork</a>	AC	300-399 kV	Overhead	Boston

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a. If you have been reporting the element in Form 3.x; in the “Name of all Transmission Owners” table select the Element ID as you have been reporting it, then click “Modify”.

NERC ID	Name	Region	Country	TO Element ID
NCR55555	Jacks Transmission Co	MRO	US	BostonNewYork
NCR99999	NERC Demo Company	MRO	US	

**Update Activity**  
Last Updated by: NERCdemo on 09/22/2022 11:37 CPT  
Created by: NERCdemo on 09/22/2022 11:37 CPT

Buttons:

Duplicate Line Reporting : This place - That place

b. If you have not been reporting the element in Form 3.x; in the “Name of all Transmission Owners” table select the option “This Element is not reported in Form 3”\*, then click “Modify”.

\* This option was not included in the initial update. OATI is working to add it to the dropdown options. An announcement will be distributed to TADS users when the option is available.

## **FAQ**

### **Following the update new elements have appeared in my Form 2 data and I am not the listed Reporting TO.**

The update made it so that Form 2 records are linked to all the companies and inventory that are listed on them. If you are seeing new Form 2 records, then the listed Reporting TO has been reporting them separately. Please contact the Reporting TO and determine whether the records are valid and accurate for Form 2.

If you do not have a TADS contact at the listed Reporting TO please contact NERC at [TADS@nerc.net](mailto:TADS@nerc.net) and your Regional TADS contact (Regional contact information available on the [TADS page](#) of NERC.com).

### **If elements have disappeared from Form 2 data:**

As part of the update, if any of the following occurred, the Form 2 record was removed:

1. The system was unable to match the Element ID put into Form 2 with Form 3 because of a difference in capitalization
2. The Form 2 record was only being reported by the non-reporting TO and not the reporting TO
3. The Element ID in the Form 2 record did not exist in the Form 3 inventory or there was a spelling error

OATI is working to restore records deleted due to the first scenario. Records deleted due to the second or third scenario will not be restored and should be repopulated with corrected information.

### **For a non-reporting TO that has been reporting outage data for the element:**

Please contact NERC at [TADS@nerc.net](mailto:TADS@nerc.net) and we will work with you to correct any historical reporting.