



Federal Energy Regulatory Commission

eTariff Basics

How to create tariffs, revisions and tariff filings

eTariff is work-in-progress. Window appearance, functionality, menu choices and locations may change. If you are not sure where to find something or something has changed, look around the window and try right-click at logical focus points. If not sure, experiment. Experiments should not cause software errors. If they do, please document and notify etariff@ferc.gov.

Assumptions

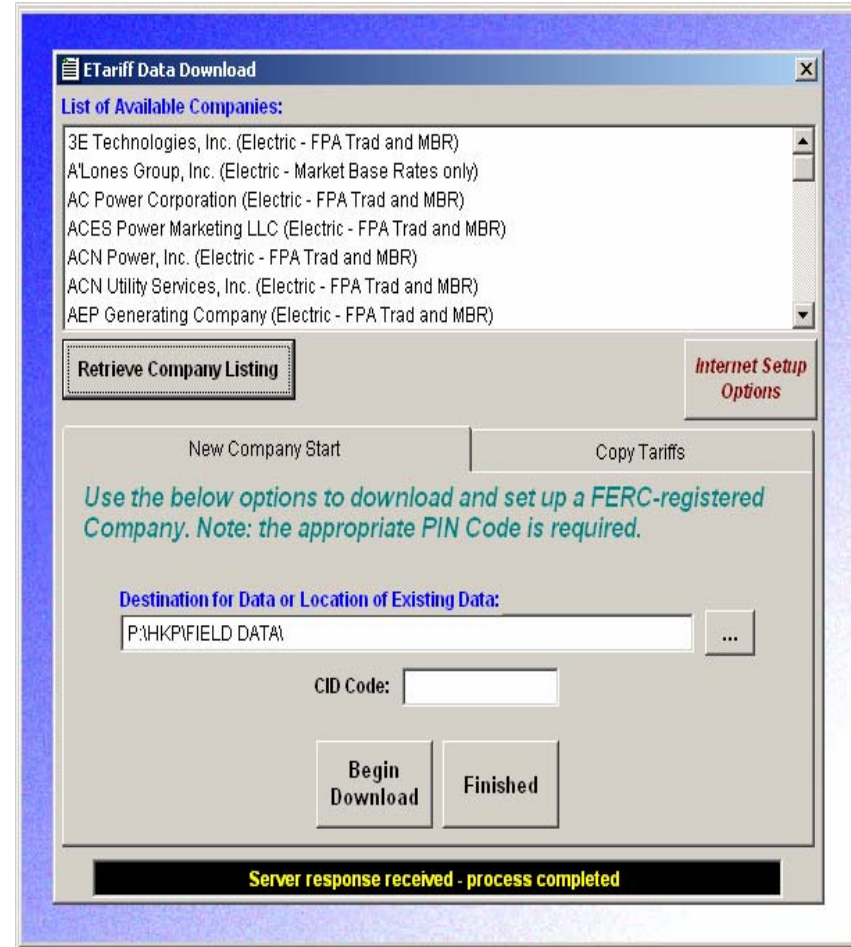
- eTariff is installed and in communication with FERC
 - If a regulated company, registered and received CID
- User familiar with tariffs
- User familiar with FERC tariff filings
- User familiar with FERC procedures

Tariff Data Format

- Tariffs are a Data Base
- NOT a text document
- Example data set for every tariff section
 - Company name
 - Docket number
 - Proposed effective date
 - Tariff section
 - Filing type
- Tariff section “content”
 - Text area:
 - Accepts most copied text
 - Editable within eTariff
 - Limited format capabilities
 - Accepts many copied formats such as graphics
 - Will not accept pasted files
 - One file attachment per section

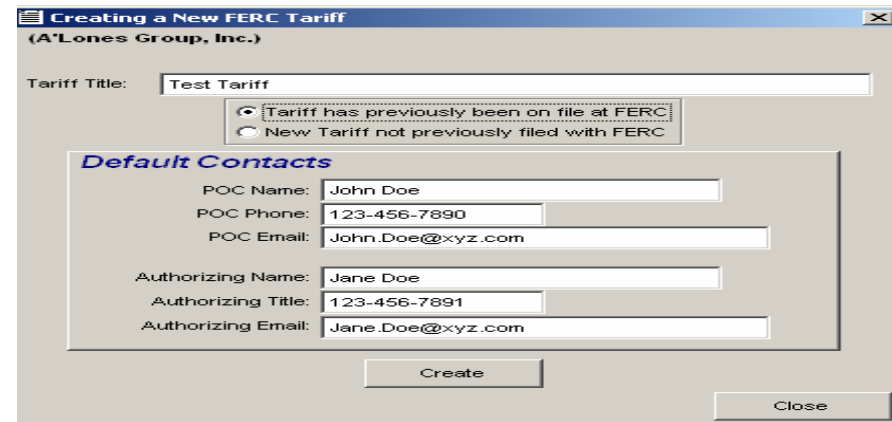
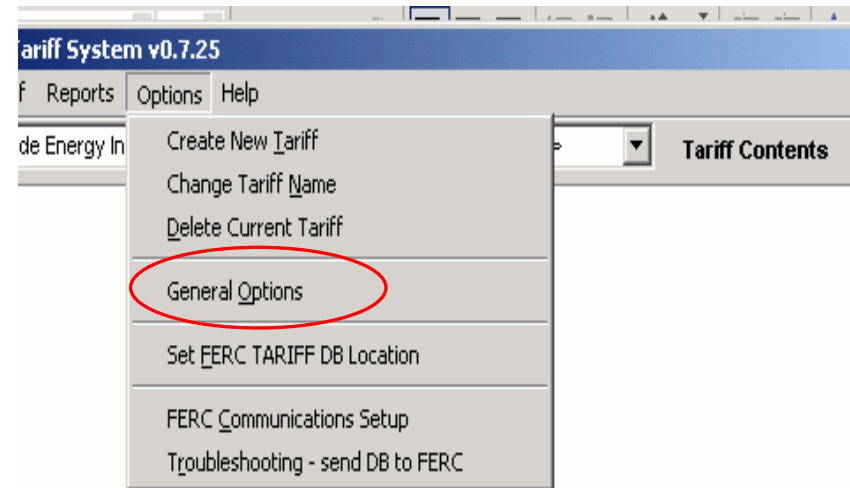
First-time

- 1st time users must establish an empty data base file
 - Retrieve company list
 - Select company
 - Choose file location
 - Enter CID
 - Download and Finish



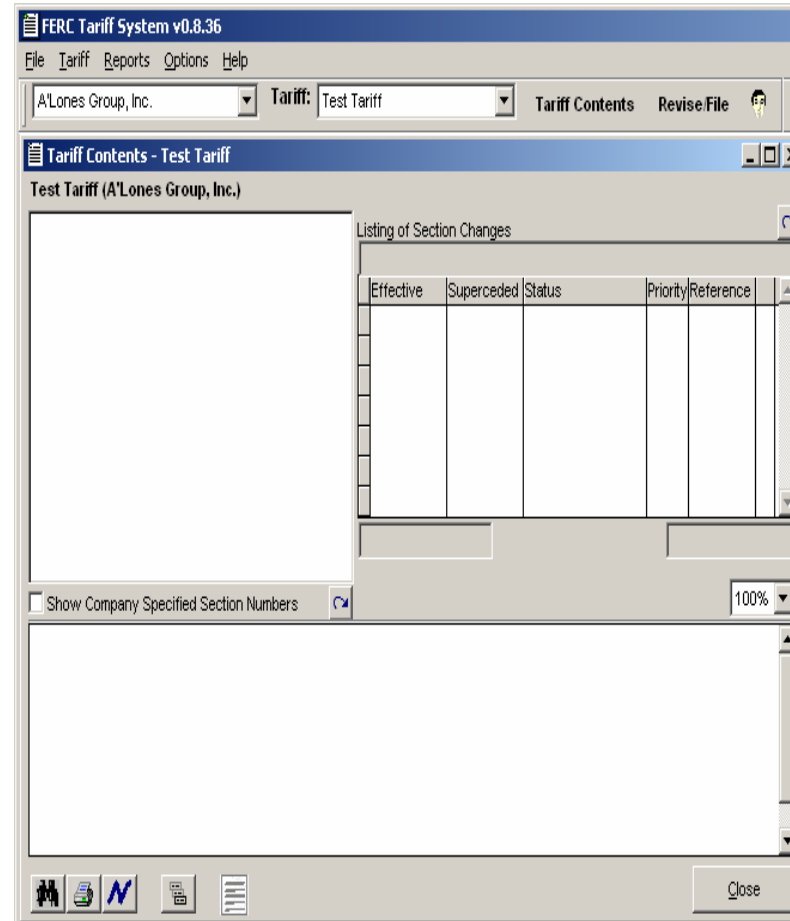
Create Tariff

- Create a tariff
 - Drop menu from “Options”
- Name the tariff
- Fill in default Contact Info
 - Edit default contact info later from “General Options”



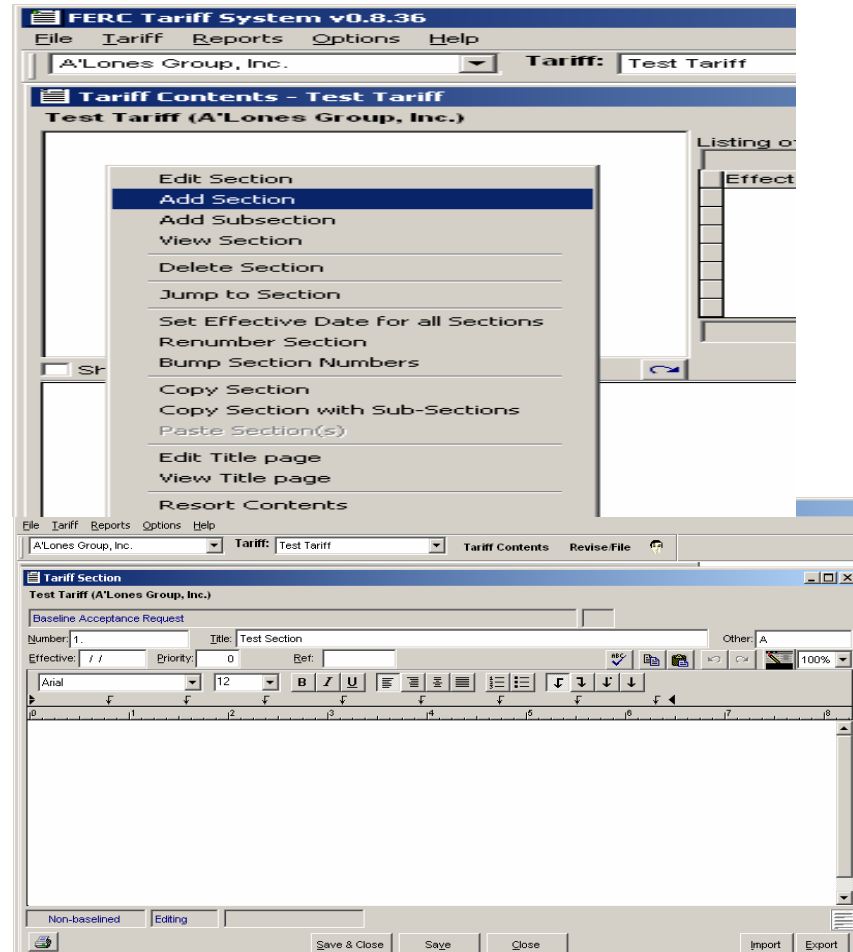
Add Content to Tariff

- From the Menu Bar
 - Select Tariff
 - Open “Tariff Contents”



Create Tariff Section - Direct

- Right Click
 - “Add Section”
- Small window pop up
 - Fill in Section Title, Company Tariff Section Numbering if any
 - Save
- Paste in, type or import tariff text
 - Save & Close



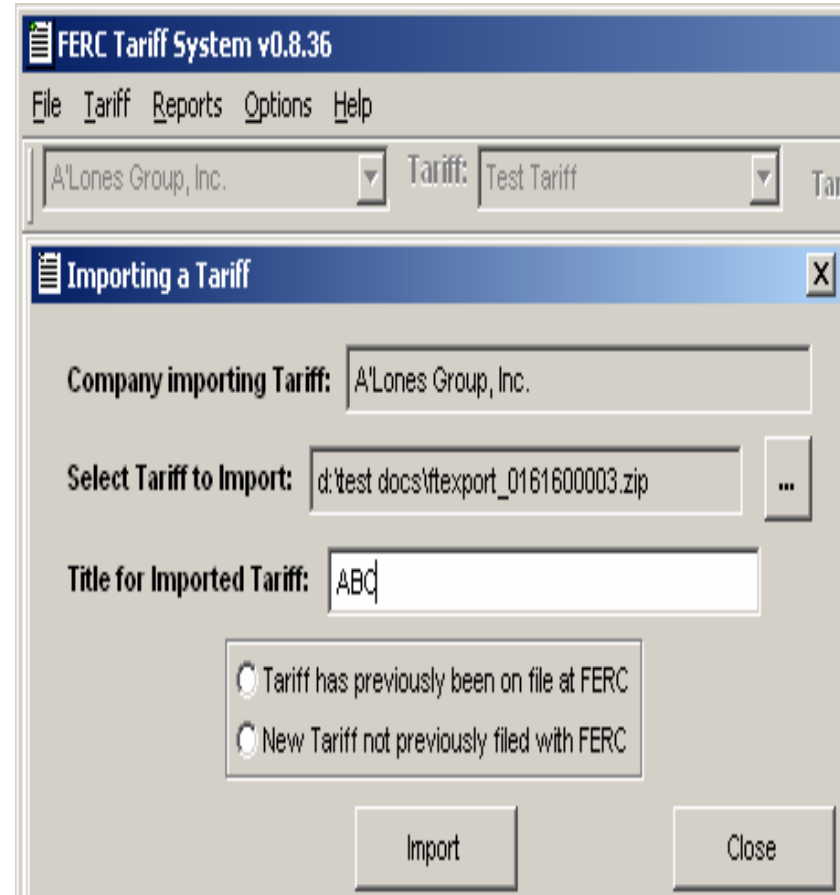
Create Tariff Section - Copy

- If a tariff already exists in the FERC public data base [or your own], copy it
- Find company, choose tariff, Download, and Finish. Note downloaded file name and location.

The screenshot shows a web browser window titled "ETariff Data Download". The interface includes a "List of Available Companies:" section with a scrollable list of companies and their associated tariff types. The selected company is "{Keith Pierce Gas Pipeline Company} (Gas - NGA)". Below the list are buttons for "Retrieve Company Listing" and "Internet Setup Options". There are two tabs: "New Company Start" and "Copy Tariffs". A blue instruction text reads: "Use these functions to obtain a 'copy' of a company's tariff. Select the Company, then select from the available list below." Below this is a "Tariffs of Selected Company" section with a scrollable list of tariffs. The selected tariff is "Tariff v 7.14". Below the list are buttons for "Download Tariff Data" and "Finished". At the bottom, a black status bar displays the message "Server response received - process completed".

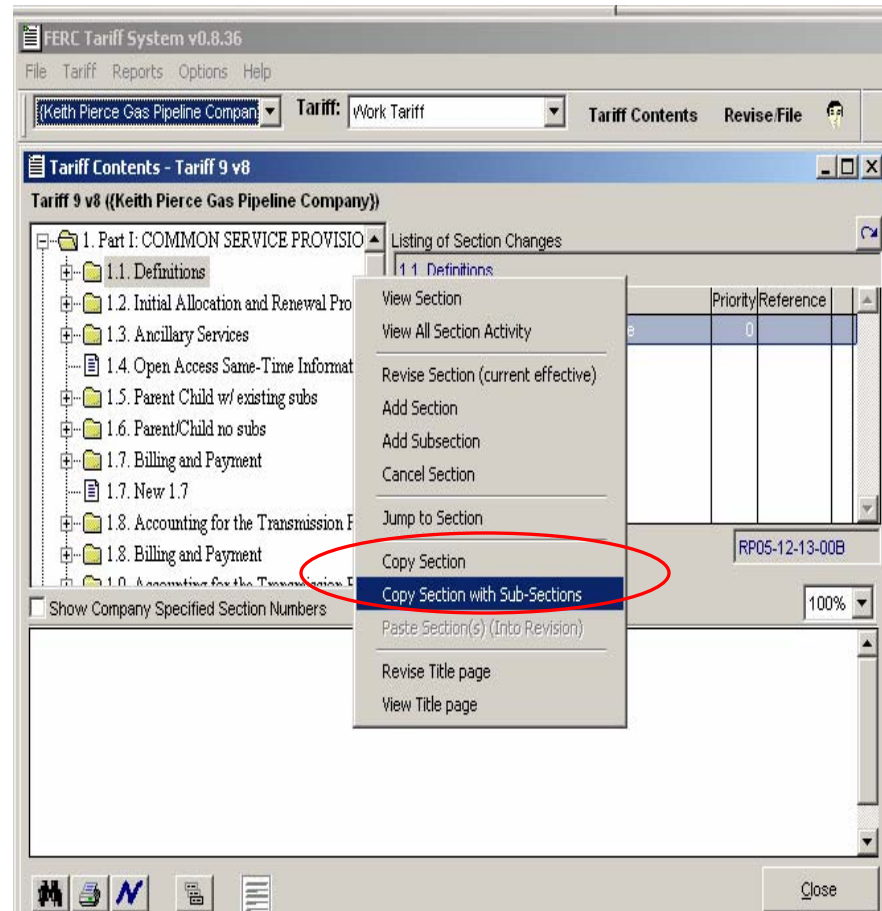
Create Tariff Section - Copy

- From File, select Import, find imported file and rename
- Copied tariff now available from menu bar



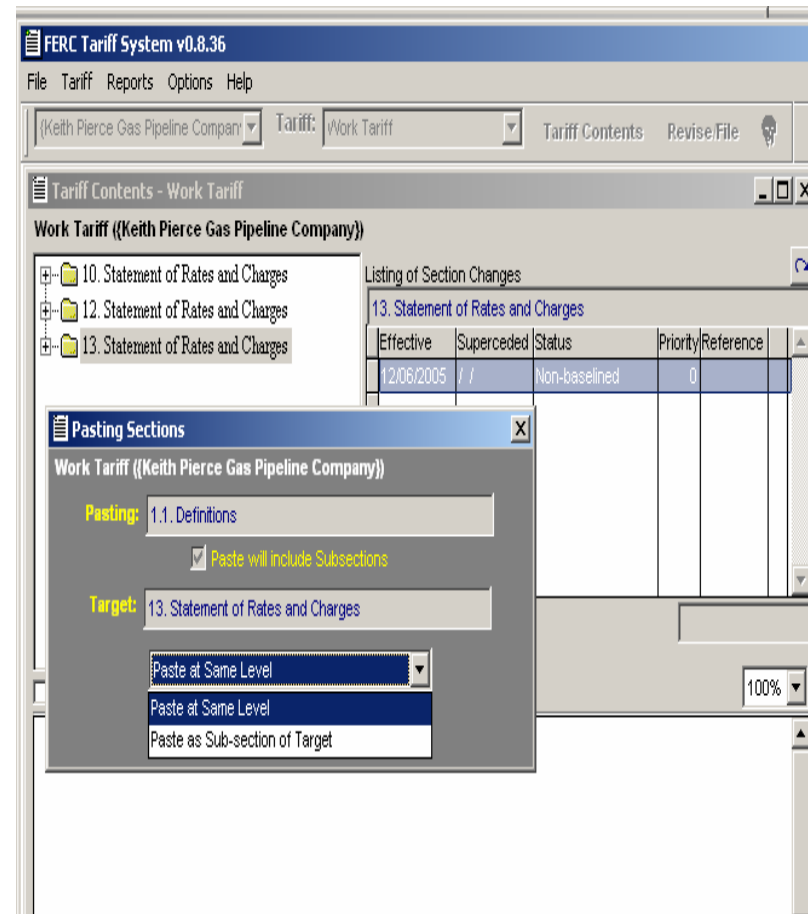
Create Tariff Section - Copy

- Target section(s)
- Right click
 - Copy Section (with Sub-Sections) as appropriate



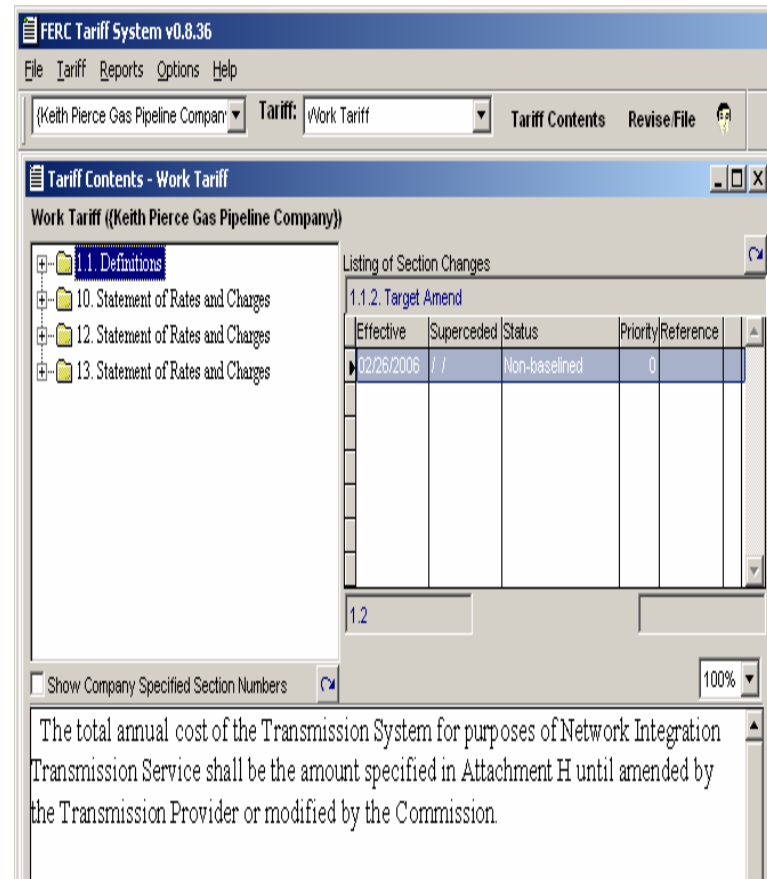
Create Tariff Section - Copy

- Target paste location, right click, select Paste Section(s)
- Choose section level, and paste



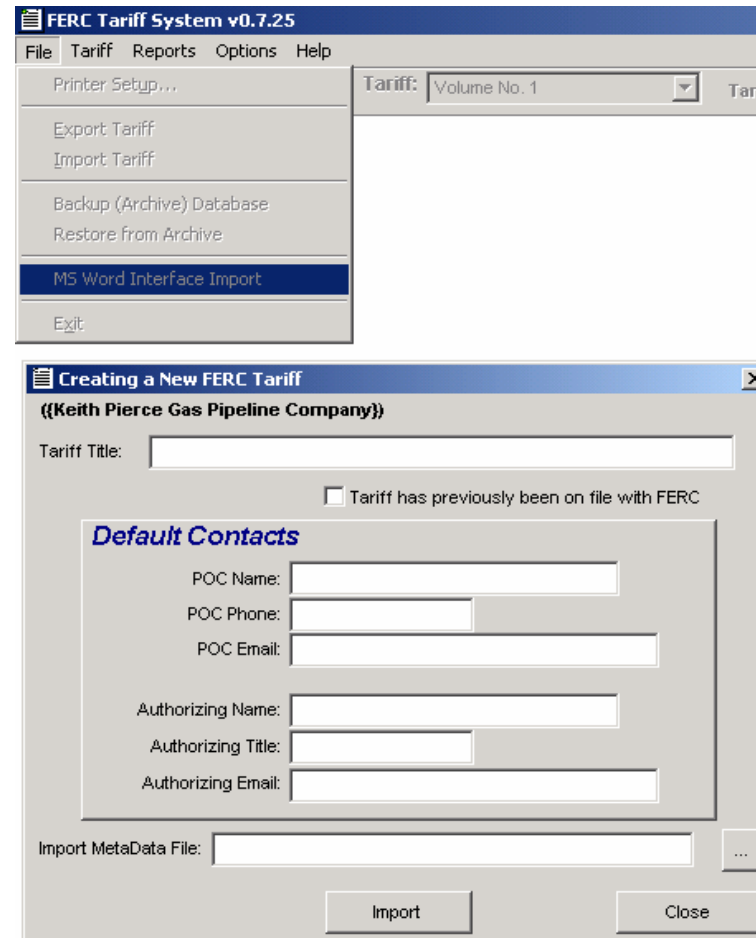
Create Tariff Section - Copy

- Copied sections now pasted in
- Hint: if copying from multiple sources or creating multilevel section revisions, create a working “Tariff”, then copy product into Baseline or Revision



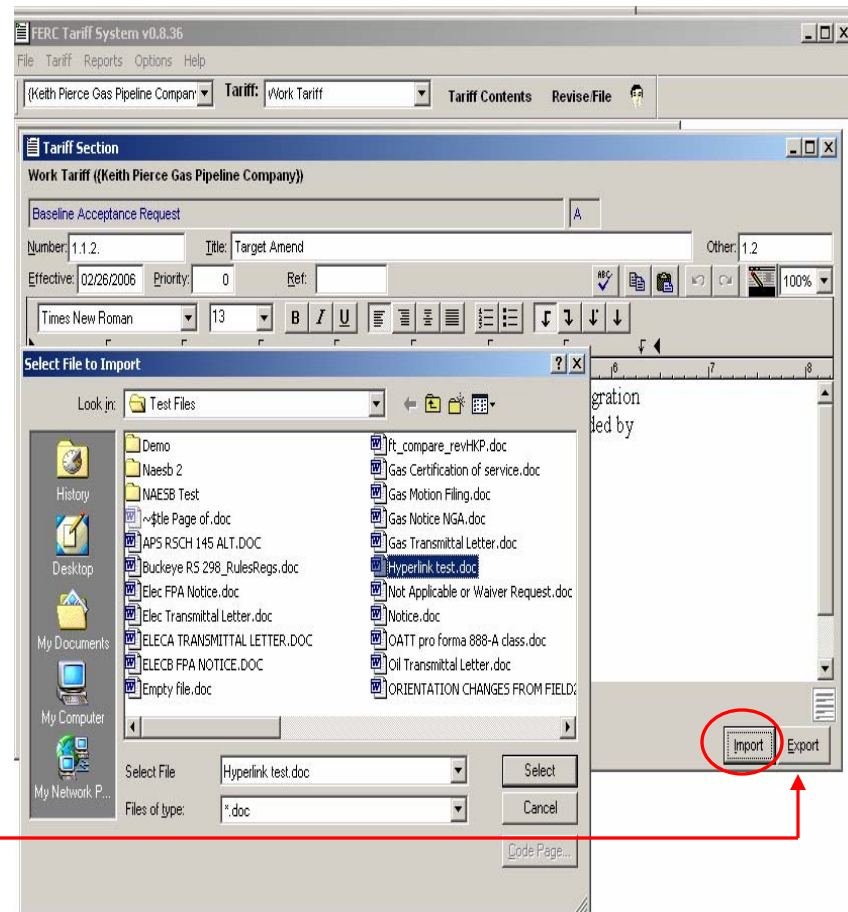
Create Tariff Section – Import Data Base

- Use an extraction macro to create an importable data base. Guidance at <http://www.ferc.gov/docs-filing/etariff/conversion-guide.pdf>.
- From File, click “MS Word ...Import”



Create Tariff Section – Import

- Import a MS Word file text directly into a section
 - Good for heavily edited/large sections
 - Careful – import completely replaces section
- Export section text into a file

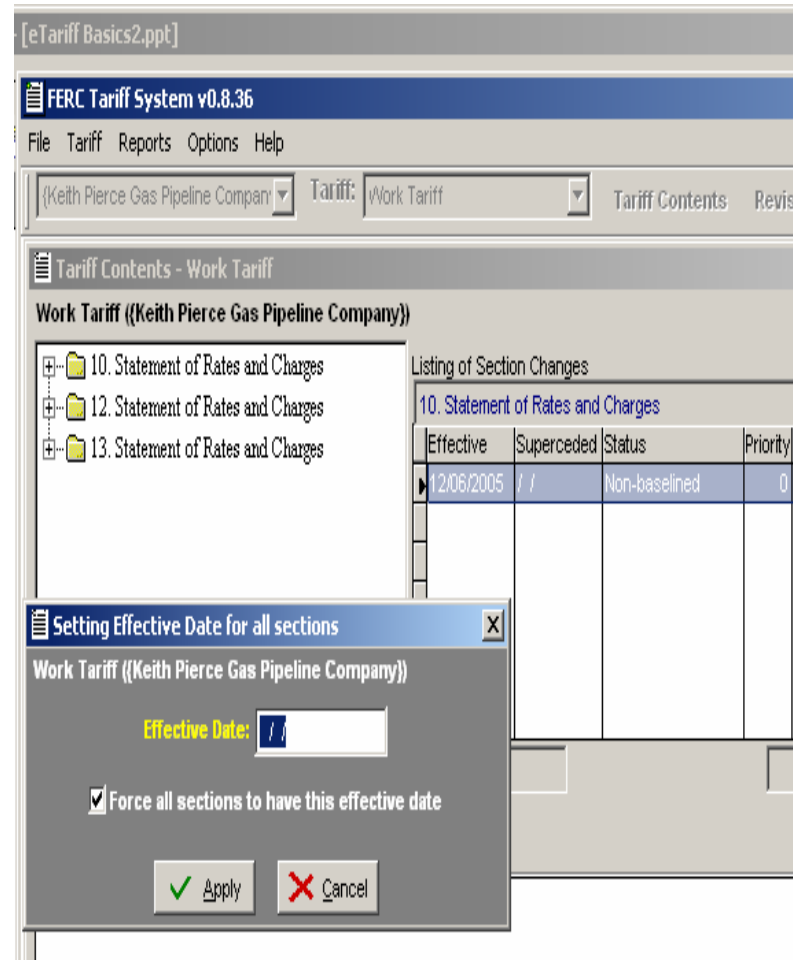


Baseline Tariff

- Baseline filings are a **special** case
 - Establishes and initializes company's tariff data base
 - Commission can only accept or reject whole filing
 - No revisions can be made or filed until accepted by the Commission

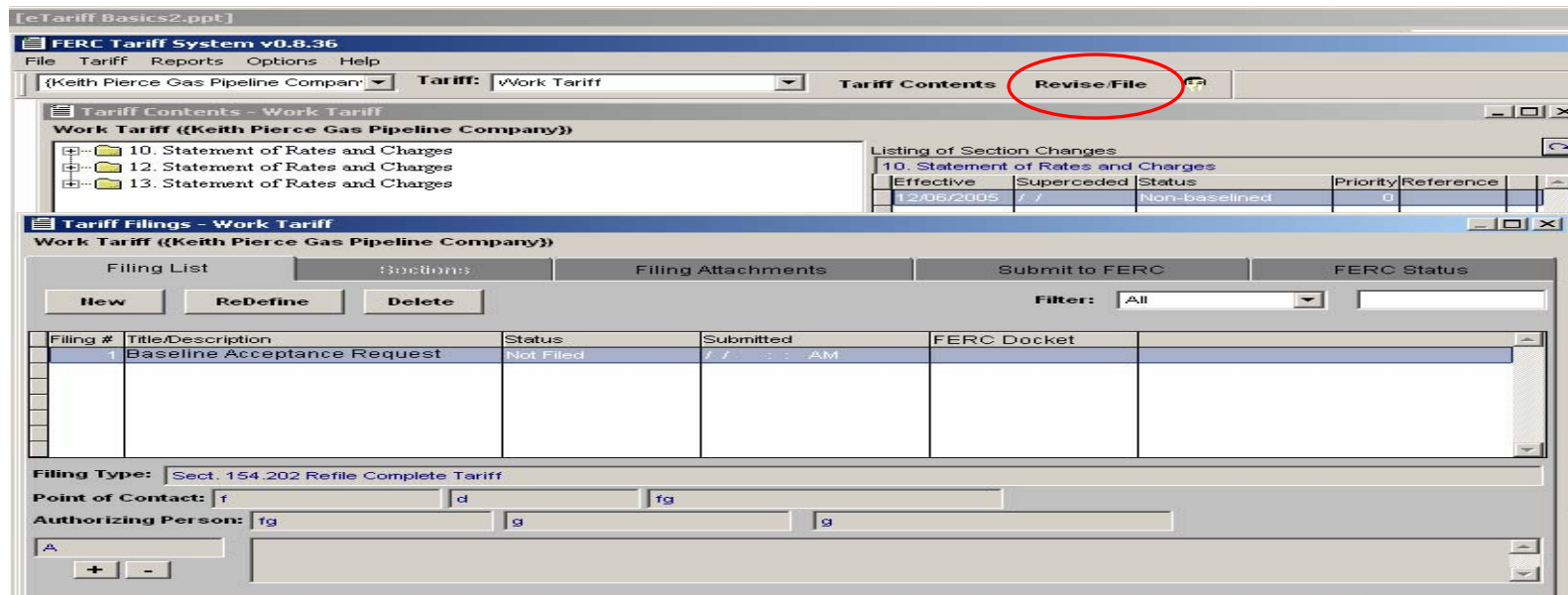
Baseline Tariff

- Special Case
 - Set effective date
 - Right click ToC
 - Enter effective date
 - prospective
 - Recommend one effective date for all sections
 - Right Click is only location that Baseline filing effective date can be set



Make a Tariff/Rate Filing

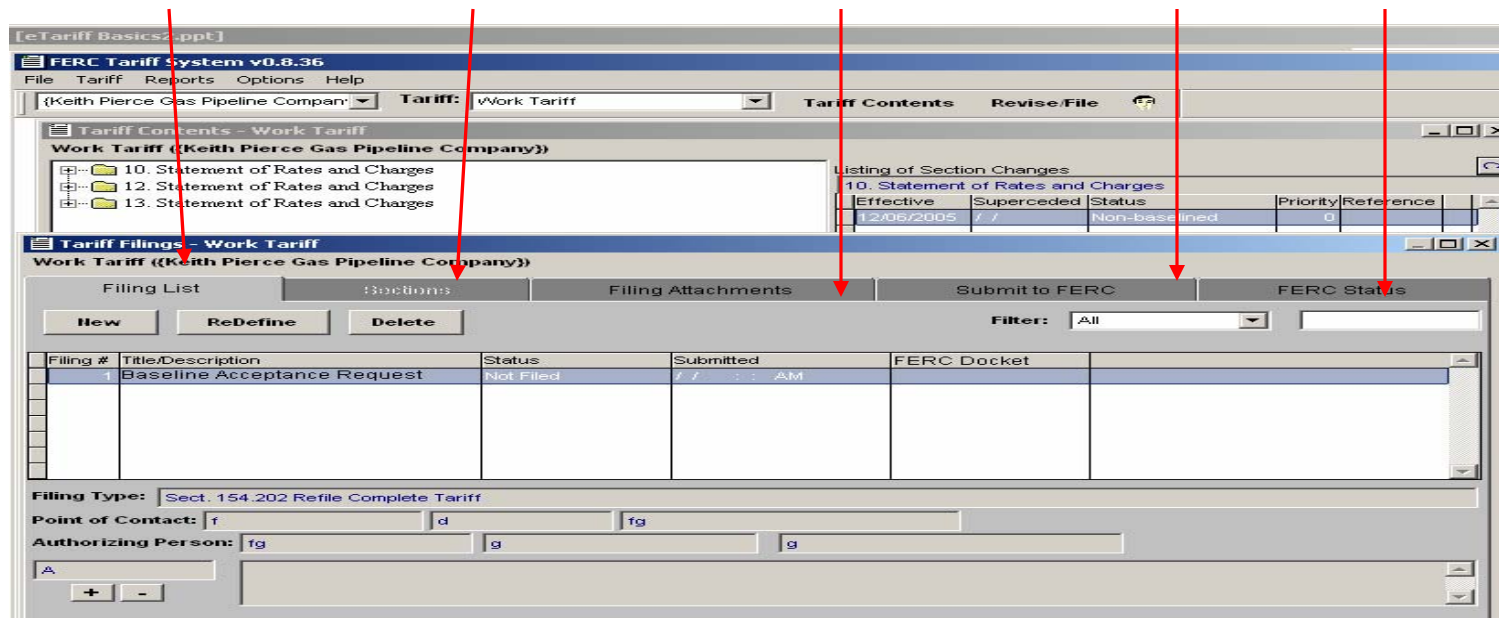
- Now that the proposed Baseline Tariff is complete, need to file with the Commission
- Open Revise/File



Baseline/Revision Filings

- Tabs of Tariff Revision window basically in order of tariff filing process:

Define|Tariff Sections|Req'd Docs|File|Status

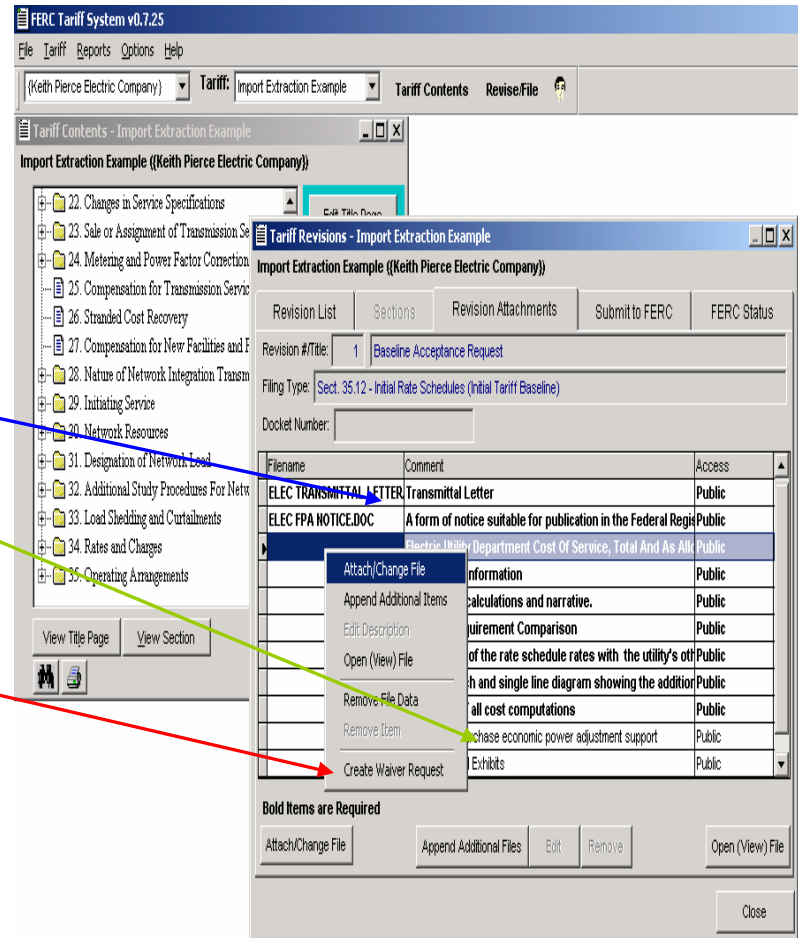


Baseline Filing

- Baseline Tariff Filings **Special** Case
 - No choice of filing types – default choice
 - No option to edit tariff sections (go back to Tariff Contents window if need further edits)

Baseline and Revision Filings

- For every filing type, required documents are in **bold**, optional in standard font
- If NA or waiver, use quick attach



Baseline and Revision Filings

- Set document security level for public viewing
 - Attach redacted in required fields, complete as another attachment
- View and edit attachments

FERC Tariff System v0.8.36

File Tariff Reports Options Help

{Keith Pierce Gas Pipeline Company} Tariff: HKP of Tenn 50 Tariff Contents Revise File

Tariff Filings - HKP of Tenn 50

HKP of Tenn 50 ((Keith Pierce Gas Pipeline Company))

Filing List Sections Filing Attachments Submit to FERC FERC Status

Filing #/Title: 3 Non fuel Tracker

Filing Type: Sect. 154.403 Periodic Rate Adjustments (Other Than Fuel, Lost or Unaccounted for Gas Trackers)

Docket Number: RP05-05-26-00b

Filename	Comment	Access
ELECA TRANSMITTAL LETTER	Transmittal Letter	Public
SG ATTACHMENT 1.DOC	Certification of Service	Public
PICTURE.JPG	Marked tariff	Public
ELECB FPA NOTICE.DOC	Notice	Public
SG ATTACHMENT 1.DOC	Unconditional or conditional motion filing	Public
SG ATTACHMENT 2.DOC	A summary statement showing the rate component added	Public
SG ATTACHMENT 2.DOC	Rate design for a new reimbursement surcharge	Public
TEMI THIRTY 20.DOC	Workpapers showing the calculation of the rate	Public
	Other Support not otherwise specified	Public

Bold Items are Required

Attach/Change File Append Additional Files Edit Remove **Open (View) File**

File Edit View Insert Format Tools Table Window Help

Document Menu Adobe PDF Acrobat Comments

10 kW Inverter Process – The procedure for evaluating an Interconnection Request for a certified inverter-based Small Generating Facility no larger than 10 kW that uses the section 2 screens. The application process uses an all-in-one document that includes a simplified Interconnection Request, simplified procedures, and a brief set of terms and conditions. See SGIP Attachment 5.

Affected System – An electric system other than the Transmission Provider's Transmission System that may be affected by the proposed interconnection.

Business Day – Monday through Friday, excluding Federal Holidays.

Inbox - Microsoft Outlook ETariff - Inbox - Microsoft... Microsoft PowerPoint - [e... FERC Tariff System v0.8.36

Baseline and Revision Filings

- Submit to FERC
 - Error messages will identify errors that would prevent FERC's Secretary from accepting filing
- Check FERC Status
 - Revision specific

The screenshot shows a window titled "Tariff Revisions - Volume No. 1 (Keith Pierce Gas Pipeline Company)". It has tabs for "Revision List", "Sections", "Revision Attachments", "Submit to FERC", and "FERC Status". The "Submit to FERC" tab is active. The form contains the following fields:

- Revision #/Title: 2 / Test filing
- Filing Type: Gas - Sect. 154.313 Limited Section 4 Rate Case (Small)
- Docket Number: (empty)
- Point of Contact: Keith Pierce, 202-502-8525, keith.pierce@ferc.gov
- Authorizing Person: Keith Pierce, SME, keith.pierce@ferc.gov

A red error message is displayed: "This address **must** be registered at FERC (via ERegistration)". A "Submit Revision" button with a yellow arrow icon is visible at the bottom.

The screenshot shows a window titled "Tariff Revisions - Volume No. 1 (Keith Pierce Gas Pipeline Company)". It has tabs for "Revision List", "Sections", "Revision Attachments", "Submit to FERC", and "FERC Status". The "FERC Status" tab is active. The form contains the following fields:

- Revision #/Title: 2 / Test filing
- Filing Type: Gas - Sect. 154.313 Limited Section 4 Rate Case (Small)
- Docket Number: (empty)
- Docket Date: // : : AM
- FERC Response: (empty)
- Time: // : : AM
- Option Approved (if applicable):

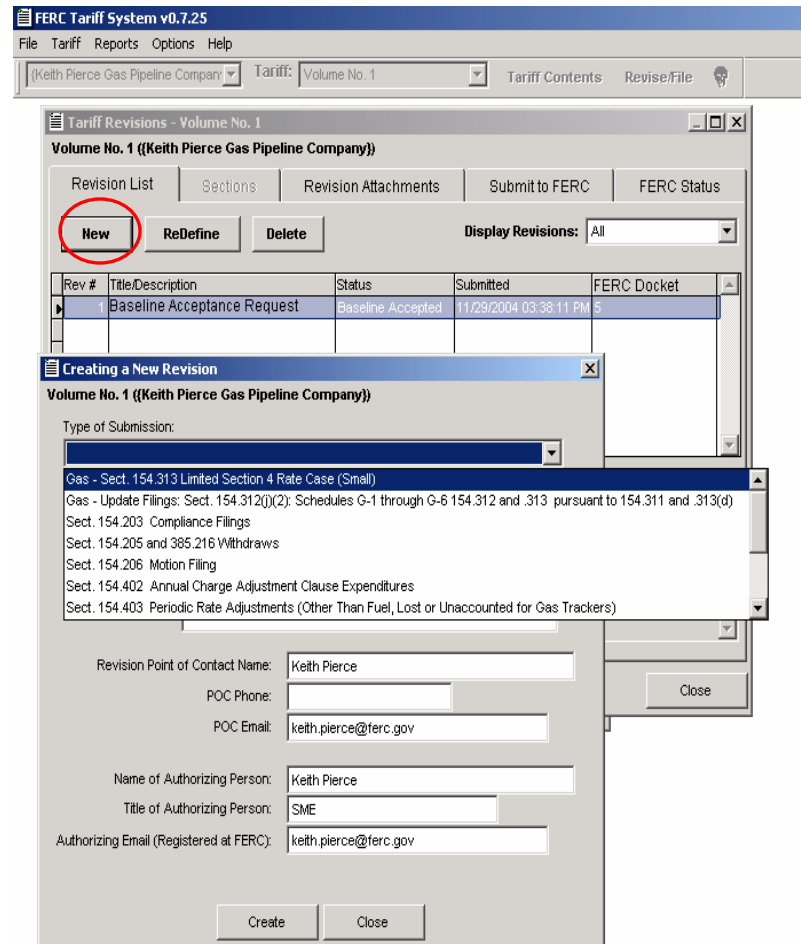
A "Check for Updated Status" button with a green question mark icon is visible at the bottom.

Revision Filings

- Unlimited revisions as work in progress
- Each revision is a separate “folder” until filed with FERC
 - not integrated with effective tariff database
- Any filing that effects a tariff section status must be made as a “revision” to the tariff
 - Initial proposals under NGA § 4, FPA § 204, ICA § 6, NPGA § 311, PA pursuant to Parts 35/300
 - Amendments and compliance filings
 - Withdraws
 - Motions to move into effect or delay effect
- All updates and additional material

Revision Filings

- Must define proposed filing before inputting edited tariff sections
- Click “New” and select filing type from drop-down menu



Create Revision Filing

- After selecting filing type, check other fields:
 - Gas program initial filings must indicate motion condition
 - Name the filing
 - Intra-company comments
 - Check for missing data
- When finished, click “Create”

Creating a New Revision

Volume No. 1 (Keith Pierce Gas Pipeline Company)

Type of Submission: Gas - Sect. 154.313 Limited Section 4 Rate Case (Small)

Do Suspended Sections Automatically go into effect: Yes/No

Revision Title: Test filing

Revision Comments: These comments are for company use. This field is not sent to the Commission.

Revision Point of Contact Name: Keith Pierce

POC Phone: [Empty]

POC Email: keith.pierce@ferc.gov

Name of Authorizing Person: Keith Pierce

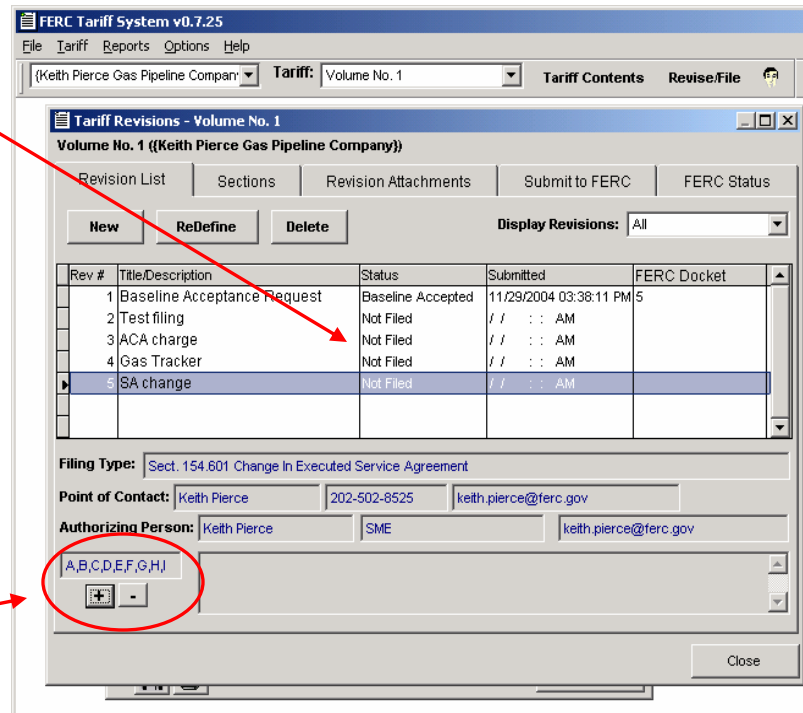
Title of Authorizing Person: SME

Authorizing Email (Registered at FERC): keith.pierce@ferc.gov

Create Close

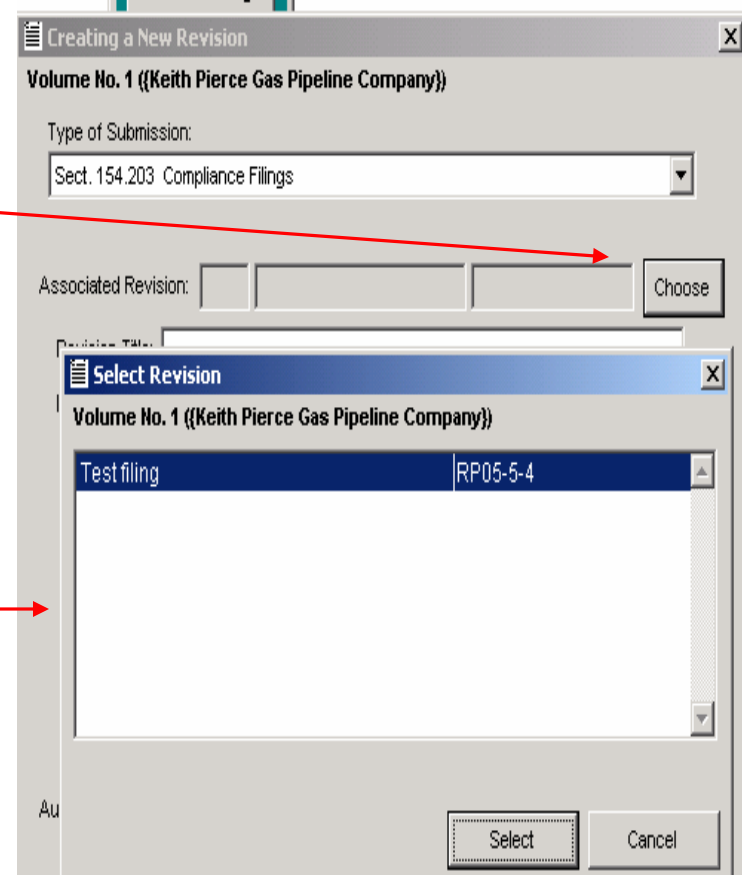
Create Revision Filing

- Many revisions can be work-in-progress
- Alternative section proposals for targeted revision enabled here



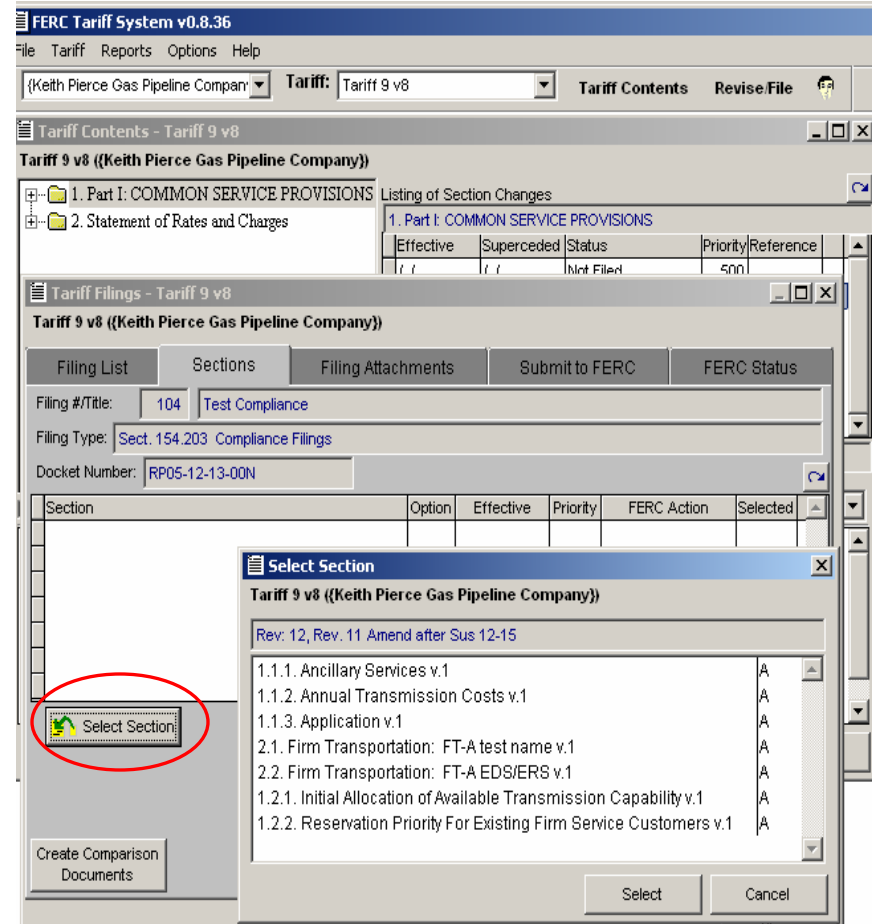
Amendment, Compliance, Withdraw and Motion Filings

- Must identify target revision filed with FERC
- A window of eligible filings for the proposed filing type will appear. Select target filing.



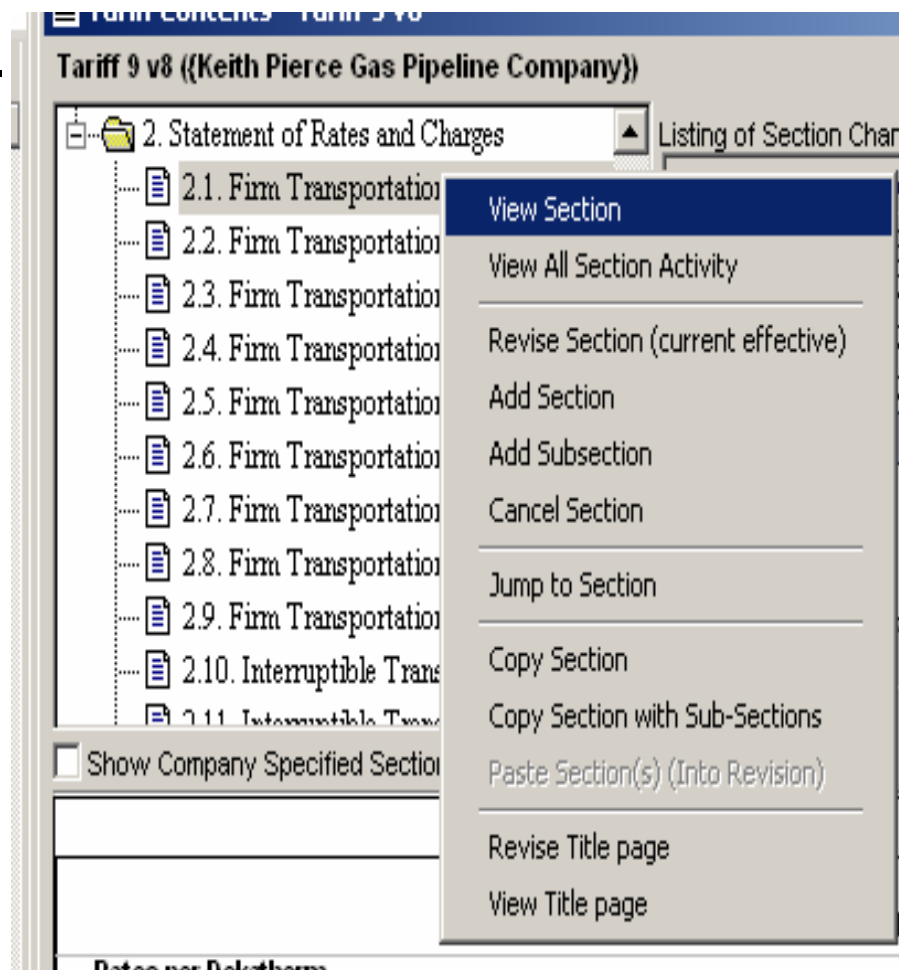
Amendment, Compliance, Withdraw and Motion Filings

- Must select sections to include in filing
- May select specific sections
- Amendment and Compliance filings may include new sections



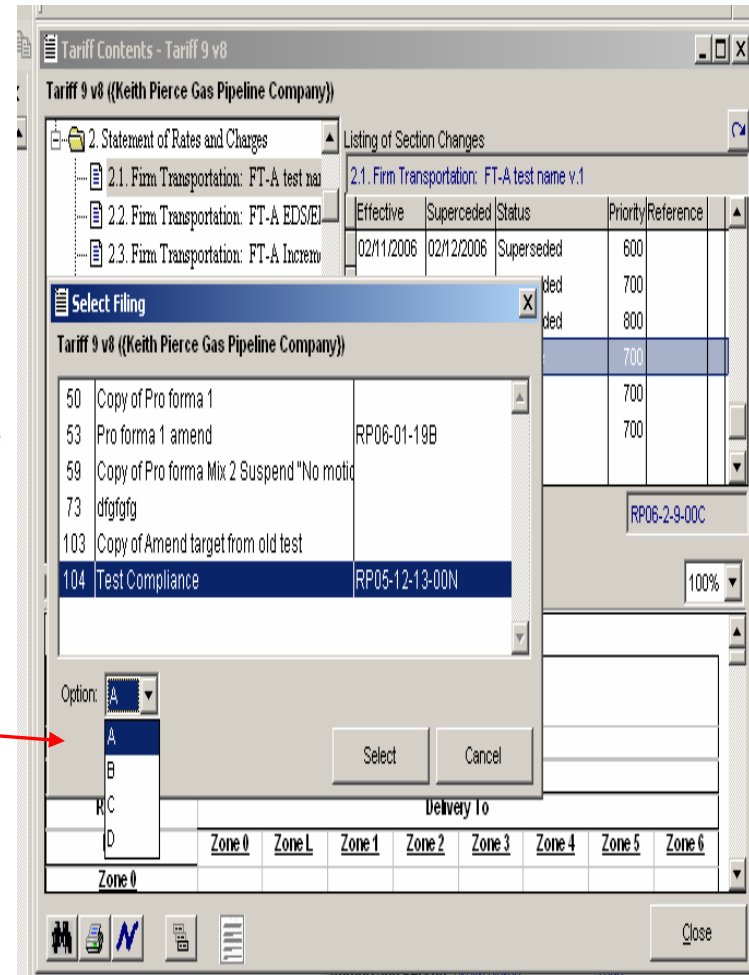
Adding Revised Tariff Sections to a Tariff Filing

- With defined work-in-progress Tariff Filing(s)
- From Tariff Contents screen
 - Right click select section, Select:
 - Revise
 - Add sections or
 - Add sub-sections
 - Cancel Section



Adding Revised Tariff Sections to a Tariff Filing

- Choose work-in-progress filing
- Choose alternative if defined and appropriate



Adding Revised Tariff Sections to a Tariff Filing

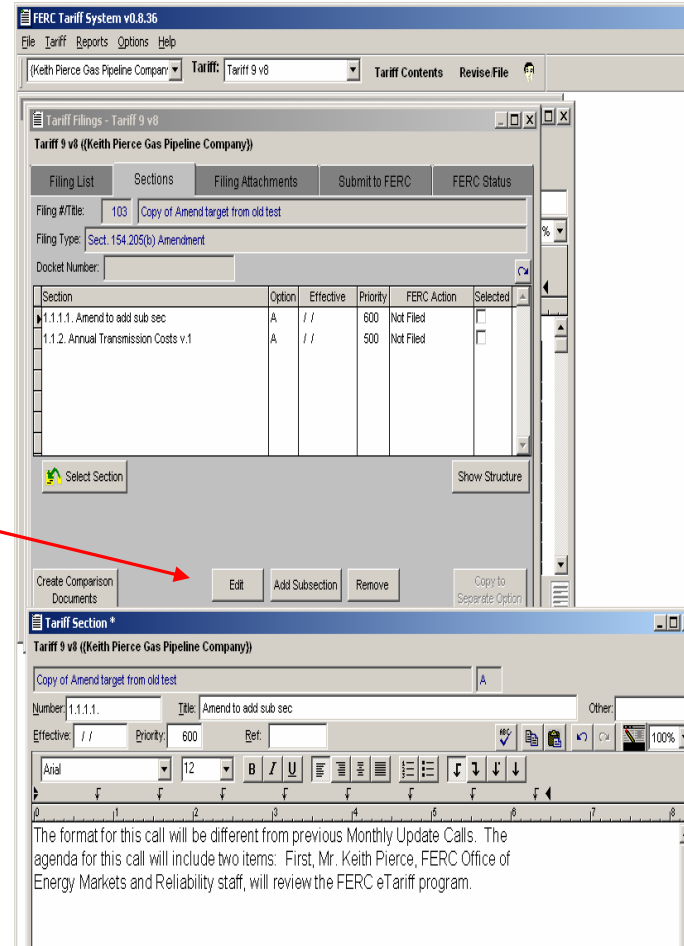
- The selected section is added to the revision
- Can be edited now or later within the revision filing

The screenshot shows the FERC Tariff System v0.8.36 interface. The main window displays 'Tariff 9 v8' for '(Keith Pierce Gas Pipeline Company)'. The 'Tariff Section' window is open, showing 'Firm Transportation: FT-A test name v.1'. Below the text entry fields is a rich text editor with a toolbar. The main content area shows a table for 'FIRM TRANSPORTATION: FT-A test name v.1' with columns for 'Receipt' and 'Delivery To' (Zone 0 through Zone 6). The table includes rows for 'Reservation', 'Base', 'PCB 1/2', 'Max', and 'Min'.

Receipt		Delivery To						
From	Zone 0	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	
Zone 0								
Reservation								
Base	\$3.13	\$6.45	\$9.06	\$10.53	\$12.22	\$14.09	\$16.59	
PCB 1/2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Max	3.10	6.46	9.06	10.53	12.22	14.09	16.59	
Min	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Adding Revised Tariff Sections to a Tariff Filing

- Sections can be edited from revision number
 - Select section
 - Click “Edit”
 - Edit, Save and Close

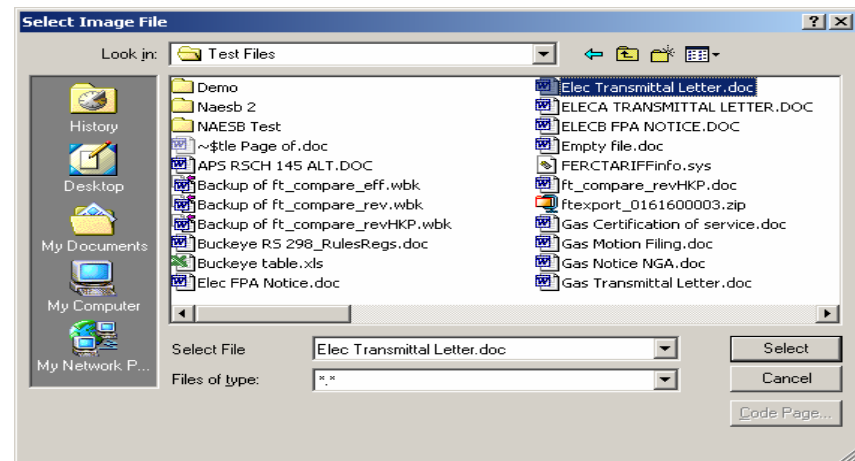
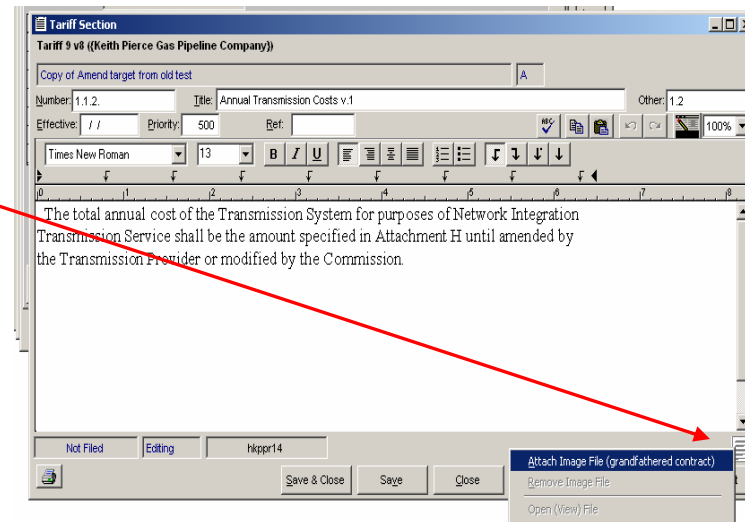


Tariff Section File Attachments

- File attachments as tariff sections only as permitted by the Commission
 - Oil Program – mandatory
 - Must be word-searchable PDFs
 - “Grandfathered” contracts
 - FPA and NGA programs
 - Old unconverted and unmodified tariffs
 - Prefer word-searchable PDFs, but accept scans
 - First modification, must convert whole document to eTariff text
 - Certain exceptions such as large graphics, rate maps

Tariff Section File Attachments

- In the Edit screen, click the grey Paper Clipped Page icon
- Select target file
- Icon will be blue if a file is attached. View the file by clicking the icon



Revision Filing

- Submit revision
 - Program will check for filing errors
 - No effective date(s)
 - Missing required attachments
 - Point of contact info

The screenshot shows a web application window titled "Tariff Revisions - Volume No. 1" for "Volume No. 1 ((Keith Pierce Gas Pipeline Company))". The interface includes a navigation bar with "Revision List", "Sections", "Revision Attachments", "Submit to FERC", and "FERC Status". The main form contains the following fields and options:

- Revision #/Title: 2 Test filing
- Filing Type: Gas - Sect. 154.313 Limited Section 4 Rate Case (Small)
- Docket Number: (empty field)
- Point of Contact: Keith Pierce, 202-502-8525, keith.pierce@ferc.gov
- Authorizing Person: Keith Pierce, SME, keith.pierce@ferc.gov

A red warning message states: "This address *must* be registered at FERC (via ERegistration)". A "Submit Revision" button with a yellow arrow icon is located at the bottom of the form, and a "Close" button is at the bottom right.

Closing Comments

- eTariff includes licensed software components
 - Once/twice a year upgraded components will require eTariff to be uninstalled/reinstalled
- eTariff should be an evolving software
 - Comments on functionality and user interface invited
 - etariff@ferc.gov
 - Explain idea/problem and suggested solution
 - Include screen shots in an attached document to help explain suggestion/problem
 - Most of eTariff upgrades will be automatic