



**TEXAS RE**

# **Facility Ratings Documentation and Workbooks**

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# FAC-008-5 Overview

## Purpose

- To ensure that Facility Ratings used in the reliable planning and operation of the Bulk Electric System (BES) are determined based on technically sound principles
- A Facility Rating is essential for the determination of System Operating Limits

## Applicability

- Transmission Owners
- Generator Owners



# NERC CMEP IP 2025



- ❑ The accuracy of Facility Ratings is a cornerstone of being able to use and protect the BES
- ❑ Operators depend on Facility Ratings to provide reliable System Operating Limits (SOLs) and Interconnection Reliability Operating Limits (IROLs) that inform operating decisions
- ❑ Protection engineers rely on Facility Ratings to protect equipment from damage while also allowing equipment to stay online when it is both safe and most needed



# FAC-008-5 Brief Updates

FERC Order 881 will lead to changes by mid-2025 in how some entities define and use Facility Ratings, aimed at increasing the accuracy of transmission system capabilities based on actual conditions.

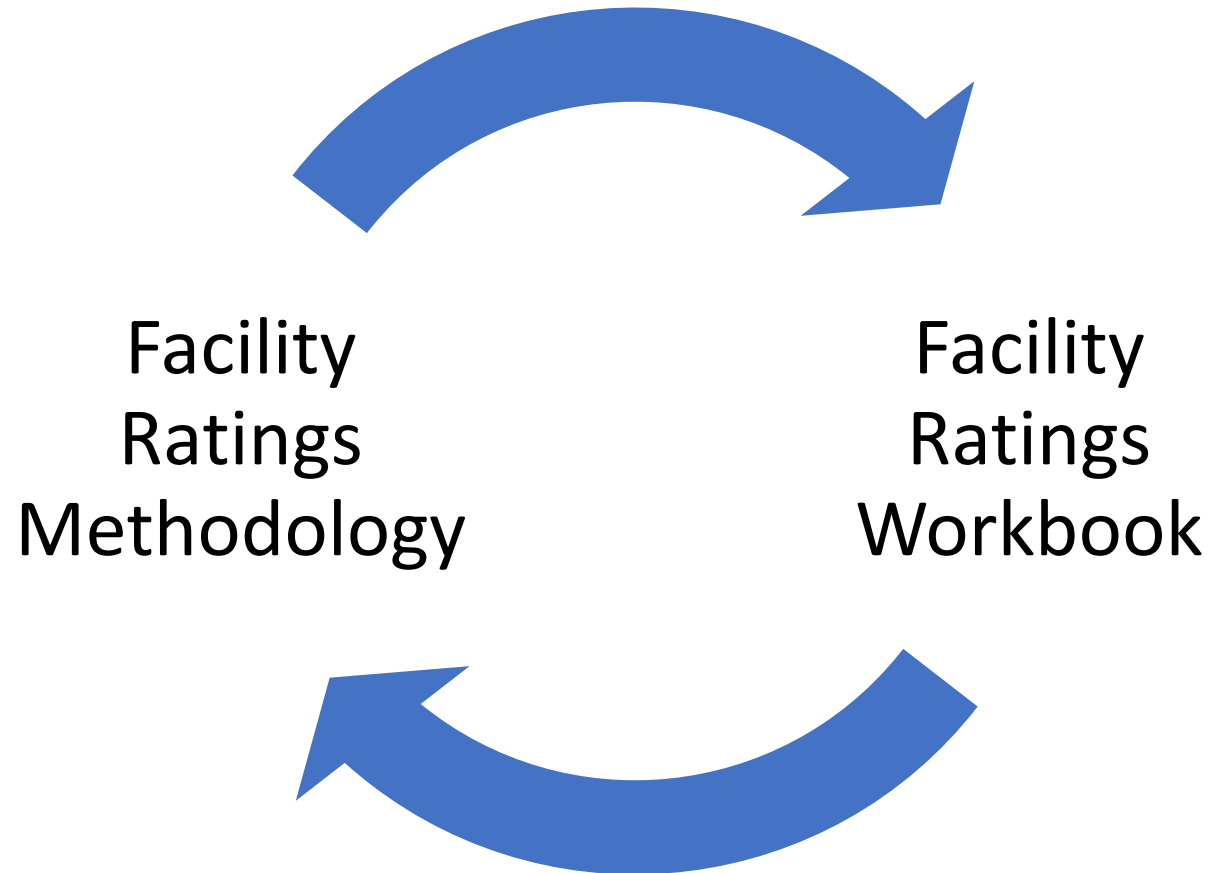
- Does not apply to Texas RE

NERC Facility Ratings Task Force (FRTF) is currently working to address risks and technical analysis associated with FAC-008.

- Seeking to align industry processes and procedures to assess risk and analytics
- Prioritize resources for those processes and procedures that focus on reliability risks and corresponding resources



# Prioritize Consistency



## Prioritize Consistency (cont.)



Consider implementing consistency checks as part of internal controls to ensure the following:

- Equipment manufacturer specifications, such as nameplate data, are consistent with Facility Rating workbook
- One-line and elevation diagrams match the entity's Facility Rating documentation/workbooks
- Facility Rating documentation/workbook information matches what is provided to ERCOT for accurate modeling purposes





# Periodic Reviews

Ensure that the entity has internal controls intended to prompt a review of its Facility Ratings with emphasis on risk management.

- Planned changes
- Unplanned changes
- Walk-down activities

Consider implementing a peer-review component when the entity's Facility Ratings are reviewed or updated.



# Change Management

## Does the entity have a change management process?

- Is it addressed in the Facility Ratings methodology?

## When equipment is replaced, how does the entity ensure that the Facility Ratings remain accurate?

- Does the entity have internal controls designed to prompt for a review of Facility Ratings?
- Who is responsible for this review?





# Workbook Best Practices



- ☐ Acknowledge and identify Most Limiting Element for each Facility
- ☐ When documenting Facility Ratings, include column where supporting documentation document names can be listed
- ☐ Include all relevant equipment, BES and non-BES
  - Consider adding a column labeling BES and non-BES equipment for clarity
  - [Bulk Electric System Definition Reference Document](#)



# Record Management Best Practices

Consider establishing revision tables to capture review and update details

Information to consider including:

- Dates
- Personnel name and title
- Brief comment or description of the changes made

Version	Date	Personnel Name/Title	Comment
0	01/05/2022	XXXX/XXXX	-
1	01/10/2023	XXXX/XXXX	-
2	09/25/2023	XXXX/XXXX	-
3	01/02/2024	XXXX/XXXX	-



# Key Takeaways

Accurate Facility Ratings are essential to the reliability of the BES

Change management processes, supporting documentation references, and adequate periodic reviews ensure correct Facility Ratings are documented and communicated

Using internal controls enables an entity to more easily track and maintain its Facility Ratings data



The background of the slide features a blurred image of the Texas state flag on the left and a close-up of a wind turbine's hub and blades on the right. The blades are white with red tips. A dark blue rounded rectangle with a thin light blue border is centered over the image.

# Questions?



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Ensuring electric reliability for Texans