Welcome to the EIA-111 Information Session for the New EIA Respondent Portal

Your patience is appreciated as we allow a few minutes for attendees to join the call. The presentation will begin shortly.

**Housekeeping Items:**

- All phones are muted
- If you have questions during the presentation, please enter them into the WebEx Chat to be answered after the presentation
- A recorded version of this presentation will be posted on the EIA website
Information Session for the EIA Respondent Portal
Quarterly Electricity Imports and Exports Report (EIA-111)

Wednesday, September 29, 2021

U.S. Energy Information Administration
Office of Energy Statistics
Agenda

This presentation addresses the following:

• What’s new & why
• How to register for and use the new EIA Respondent Portal
• How to sign in, navigate and submit the webform, including data validation
• Timeline for registering and reporting
• Ask questions and get answers
EIA has developed a **new** Respondent Portal to submit your EIA-111 form via a webform.

For reference, respondents can download the form and instructions at [https://www.eia.gov/survey/](https://www.eia.gov/survey/)

**Why the New Portal?**
- New interface - same look on survey form
- More user friendly; reduced respondent burden
- Respondent has more control in data validation
- More secure transmission of data
How to Access the EIA Respondent Portal

Access Instructions

All respondents must register for an account in the EIA Respondent Portal to access the EIA-111 webform. Respondents will receive a one-time email with a new Entity ID that will appear in the Respondent Portal. Once registered, respondents can use the Sign In section of this page.

• Follow the link to EIA’s online reporting system which will be provided
• First time users click on the Register button
• Please use the Google Chrome internet browser
• Use this link to access the EIA Respondent Portal: https://survey.eia.gov
Registration via the EIA Respondent Portal

**Access Instructions**

Enter the information provided to you via the invitation email to register:

- Email
- First and last name
- Entity ID
- Phone
- Company name

*Note: Please include all contact information provided in the invitation email, including Entity ID. We recommend using the copy/paste function to avoid mistakes.*

Optional information includes your job title and manager’s identification information.

Click on the radial button yes/no to indicate if you are responsible for submitting data on behalf of your company.
Registration via the EIA Respondent Portal

Access Instructions

Once the registration information has been entered, and the information matches what EIA has on file for your company, EIA will send an email with instructions for accessing the Respondent Portal.
Registration via the EIA Respondent Portal

**Access Instructions**

Note: if the contact information entered on the registration page does not match the information provided in the invitation email, an EIA Customer Care Team member will contact you via email with instructions to obtain access to the Respondent Portal.
Registration via the EIA Respondent Portal

Access Instructions

Respondents will receive an email that confirms their registration approval with a temporary password and instructions on how to proceed. Once this email is received, return to the Respondent Portal to continue the registration process.
Registration via the EIA Respondent Portal

**Access Instructions**

On the Respondent Portal landing page, enter your email address as the **User Name** and the temporary password provided in the registration approval email.

Click **Sign In** to continue the registration process. If you have any problems with your password, click on the **Trouble Signing in?** link for instructions to reset your password.

![Respondent Portal Screenshot](image)
Registration via the EIA Respondent Portal

Access Instructions

You will be required to reset your temporary password to a permanent one that meets the EIA security requirements. Click Submit to continue the registration process.

Once you have created a new password, you will receive a confirmation screen as follows:

Click on the Return to Respondent Portal link to log in once more with your User name (email address) and new password to proceed to your EIA-111 webform.
Registration via the EIA Respondent Portal with Two-Factor Authentication

**Access Instructions**

After your successful log in with a permanent password, EIA will send a one-time passcode via email. Enter the eight-digit passcode and click on **Verify One Time Passcode** to proceed to your EIA-111 webform.

Note: this passcode expires within five minutes. If you mistype the code or pass the five-minute activation period, simply click on the Resend button and check your email for a new passcode. **This two-factor authentication step will be required for log in each time you access the Respondent Portal.**

**A note about two-factor authentication:** The cybersecurity threat landscape is constantly changing and evolving. Cyber-attacks are becoming more sophisticated and require network and system defenders to deploy more advanced protection capabilities. Two-factor authentication is one such capability that decreases risk of compromise by creating additional complexity for the attacker to compromise a system.
Registration via the EIA Respondent Portal

Access Instructions

The final step to access the EIA-111 webform is to view and agree to EIA’s Warning Privacy and Security Notice. Respondents can read the Rules of Behavior by clicking on the link provided then click on the **Agree** button to proceed.
Accessing Your EIA-111 Webform

**My Dashboard**

My Dashboard is a landing page that allows the respondent to (1) navigate to forms that need to be filed, (2) view completed surveys and (3) compose and/or view any messages between the respondent and EIA.

The Dashboard will present the number of cycles needing to be filed, the number of completed surveys, and any messages to the Respondent. To begin filing EIA-111 data via the webform, click on the **To Do** button.
Accessing Your EIA-111 Webform

My Dashboard

Note: If you submit multiple reports, use the drop down arrow to navigate.

Clicking on the desired name populates the My Dashboard landing page allowing access to the To Do, Completed Surveys, and Message links for each entity.
Accessing Your EIA-111 Webform

The **To Do** tab provides a link to the webform(s) your company is required to file.

Click on the Entity ID number (hyperlinked in blue) to access the EIA-111 webform.

---

### My To Do

<table>
<thead>
<tr>
<th>ID</th>
<th>Survey Type</th>
<th>Location</th>
<th>Report For</th>
<th>Current Status</th>
<th>Survey Due Date</th>
<th>Last updated by</th>
<th>Last Updated Time</th>
</tr>
</thead>
</table>
Best Practices Using the EIA-111 Webform

**Browser**

Google Chrome is the best option for optimal portal and webform performance. Other browsers will work; however, some visibility issues may occur.

**Navigation**

Click on the EIA logo at the top of any screen to return to the EIA Respondent Portal Dashboard at any time.

**Navigation**

Utilize the back button **within** the webform rather than your browser’s back button. This button is located at the bottom of each screen.

**Print**

Utilize the print button **within** the webform rather than your browser's print function. This button is located at the bottom of each screen.
Advantages of using the EIA-111 Respondent Portal & Webform

**Accessibility**
- Ability to access current cycles, enter data, and view previous submissions (beginning with the Q3 cycle)

**Data Validation**
- Webform contains interactive edits
- Exception Dashboard allows for data review and error resolution

**Account Security**
- Access to data and submissions only allowed by registered users
The Respondent Portal enables only the Sections that are required for your type of operation.

<table>
<thead>
<tr>
<th>Type of Operation</th>
<th>Sections to File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export Authorization</td>
<td>Complete Sections 2A and 2B. Complete Section 5 (Comments) if applicable.</td>
</tr>
<tr>
<td>Power Marketer</td>
<td>Complete Sections 2A and 2B. Complete Section 5 (Comments) if applicable.</td>
</tr>
<tr>
<td>Public Utility</td>
<td>Complete Sections 2A and 2B. Complete Section 5 (Comments) if applicable.</td>
</tr>
<tr>
<td>Border Balancing Authority</td>
<td>Complete Sections 3A and 3B. Complete Section 5 (Comments) if applicable.</td>
</tr>
<tr>
<td>Presidential Permit</td>
<td>Complete Sections 4A. Complete Section 5 (Comments) if applicable.</td>
</tr>
<tr>
<td>Transmission Limit Restriction</td>
<td>Complete Section 4B. Complete Section 5 (Comments) if applicable.</td>
</tr>
</tbody>
</table>
Section 1 contains pre-loaded respondent identification information. If you need to change any of the information in Section 1, you must contact EIA for assistance.

Email: eia4usa@eia.gov
Phone: 1-855-EIA-4USA (1-855-342-4872)

Click **Continue** to proceed.
Filing the – Data Entry

Notes on Data Entry

As you enter data on the webform, edits will flag in addition to the full-form edits once all data are entered and submitted.

In this example, the respondent did not provide the month under the Identification drop down menu. Notice the red text under the empty data field (Value cannot be blank). In addition, if the respondent clicks Continue, a warning will appear on screen before advancing to the next Section.
Filing the Webform – Section 2A Imports into the U.S. from Canada or Mexico

Section 2A captures data on Imports into the U.S. from Canada or Mexico.

- Use the **Add** button to enter import data for each month in the quarter
- Use the **Remove** button if you need to delete an import
- Click on **Continue** to proceed to the next Section of the form

A note on data entry: as you progress from field to field, the red asterisk will indicate required fields
Section 2B captures data on exports from the U.S. to Canada or Mexico.

For each export, click on the button to file identification data, export data and transaction revenue data.
Filing the Webform – Section 3A: Actual Interchange

Section 3A

U.S. Border Balancing Authorities report actual interchange in Section 3A.

Click **Add** to enter additional rows and **Remove** if you need to delete a row.

Click **Continue** to proceed to the next Section of the form.
Filing the Webform – Section 3B: Implemented Interchange

Section 3B captures data from U.S. Border Balancing Authorities on the monthly total of Implemented Interchange crossing U.S. international borders.

Click **Add** to enter additional rows and **Remove** if you need to delete a row.

Once complete, click on the **Continue** button to proceed to the next Section applicable to your operation.
Filing the Webform – Section 4A: Metered Flow on Transfer Facilities

Section 4A

Presidential Permit Holders file Section 4A on the metered flow on transfer facilities for each month in the quarter.

Click Add to enter additional rows and Remove if you need to delete a row.
Filing the Webform – Section 4B:

**Section 4B**

Those respondents with Transmission Limit Restrictions file Section 4B.

Click [Add] to enter additional rows and [Remove] if you need to delete a row.
Section 5

Enter any overall comments pertaining to any data entered thus far.

If you have questions and/or comments that require a reply, do not use this comment section. We recommend using the Message feature so that the EIA Customer Care Team can follow up directly.

Once complete, click on the Continue button to proceed to the Preview screen.
The Review section provides a summary of all information entered for the entire webform. Scroll down the page to review all data entered. Make changes if needed, then click on the Submit button.

Clicking Submit will cause the EIA-111 submission to be checked for potential errors and submitted to EIA.

Use the button to print a copy of the entire form.
Using the Exception Dashboard

Exception Dashboard

Once the EIA-111 form is submitted, the system will apply edit validation rules to the data. If there are errors, a **Review Errors** banner will appear. Click **Close** to continue. This will return the respondent to the Preview tab.

The system will provide a list of potential errors found within the data submission via the **Exception Dashboard**.
Using the Exception Dashboard

The Exception Dashboard provides a list of any flagged edits found in the data submission, the location, a description, and an option to enter an override comment (if allowed).

The Exception Dashboard is a scrollable banner found at the top of the page. Use the scroll bar on the far right to view all potential errors.
Using the Exception Dashboard

**EXAMPLE 1:** DATA MUST BE FIXED

In this example, the respondent entered an energy payment that exceeds the limit allowed by EIA. Upon review, the respondent miskeyed the quantity.

The Exception Dashboard identified this error and the actual data field in Section 2A also describes the error flag in red text.

Once the error is fixed by entering valid data, click **Submit** and the exception dashboard error will disappear.
Using the Exception Dashboard

EXAMPLE 2: HOW TO OVERRIDE

In some cases, the data entered are valid even though they were flagged on the exception dashboard. In this example, the megawatt hours reported under Imports was flagged.

To override an edit, click on the speech bubble on the exception dashboard row. Enter the explanation in the Override Comment field and click submit.
EXAMPLE 2: HOW TO OVERRIDE

Once a comment is submitted, the row will change from pink to yellow.

Notice the flagged error with an override comment is now yellow. The error has been addressed with a comment and accepted by EIA for further review.
Form EIA-111 Submission

**Review & Submit**

When the submission passes all edits, the respondent will see the green banner indicating that the submission was successfully received.

At this stage, if you need to re-submit the survey with revised data, use the button under the green banner.

If you have revisions to prior quarters, please contact the EIA Customer Care Team for assistance.
Navigating the Respondent Portal – Completed Surveys

My Completed Surveys

Once a form is successfully submitted to EIA, the **Completed Surveys** tab will populate with a list of all resolved and accepted survey submissions.

Access to Surveys submitted using the Webform

Use the **Completed Surveys** tab to access surveys previously submitted via the webform but may require revision. Click on the blue ID hyperlink to access the webform, print and re-submit as needed.
Navigating the Respondent Portal - Messages

The Messages tab will house all correspondence between the respondent and EIA.

To send a message to EIA, click on the **New Message** button to compose a message.
Navigating the Respondent Portal - Messages

Messages

To send a message to EIA, click on the button

New Message

This function will initiate a secure message to EIA’s support staff. The subject and message fields are required. Respondents can use the Add button to send attachments if necessary.

Click the Send Message button and a tracking number will be provided for the successful transmission of your message.
Navigating the Respondent Portal – Contact EIA

Contact EIA

Contact information is provided for respondent support via mail, phone and email.

U.S. Energy Information Administration

U.S. Energy Information Administration
1000 Independence Ave., SW
Washington, DC 20585

855.342.4872
EIA4USA@eia.gov

Hours of operation are from 8:00 AM to 6:00 PM Eastern Time
Recap

- Respondents are encouraged to register for the new EIA Respondent Portal now with instructions provided in the invitation email sent this week.

- EIA will launch the new EIA Respondent Portal on October 1st for the 3rd Quarter collection cycle.

- For any resubmissions or revisions to data filed using the Data xChange Portal prior to the 3rd Quarter of 2021, please contact the EIA Customer Care Team:
  - Email: EIA4USA@eia.gov
  - Phone: 1-855-EIA-4USA (1-855-342-4872)
Benefits of Using the Webform

- The new webform incorporates more data validation edits allowing respondents to submit more accurate data with less follow up
- The webform is a more secure method of transmission and ensures that only registered users submit data for your company
- Respondents can easily access and revise data in one central location
- Respondents can communicate securely and directly with EIA
Questions?

• Please write your questions into the WebEx Chat feature.

• We may not have time to address all your questions, but will respond via emails collected during event registration

• A copy of this presentation, along with a questions and answers transcript will be distributed via email
Thank you for joining our Information Session today!

If you have further questions, please contact us at:

- Email: EIA4USA@eia.gov
- Phone: 1-855-EIA-4USA (1-855-342-4872)
- Link to the new EIA Respondent Portal: https://survey.eia.gov