

The **FERC** Pre-Filing Checklist

What experienced filers check before they submit, every time.

Rejected filings rarely come down to bad data. They usually come down to a step that got skipped under deadline pressure. This is the checklist experienced filers run before every submission, the one that catches problems while there's still time to fix them.

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Confirm the taxonomy version matches what's required for that specific form and period.

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Work from the current form instructions for each schedule, not last year's version or an internal wiki that hasn't been updated.

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Verify that each row and column maps to the correct FERC element, especially on schedules with known instruction and label mismatches.

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Render each schedule as it's built, not just at the end, to catch dimensional and period errors while there is still time for a thorough review and before filing deadlines become a factor.

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Run FERC's validation rules: totals, subtotals, signs, and required dimensions, before final submission.

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Reconcile footnotes against the current file, especially on schedules where FERC has pointed filers toward footnotes as a workaround.

A mid-prep render can catch a significant misstatement long before the deadline, instead of after the filing has already been submitted.



Want to see this checklist running against real FERC schedules? Systrends can walk you through it live.

Schedule a walkthrough at systrends.com/demo.