



Submitting a New Registration Request

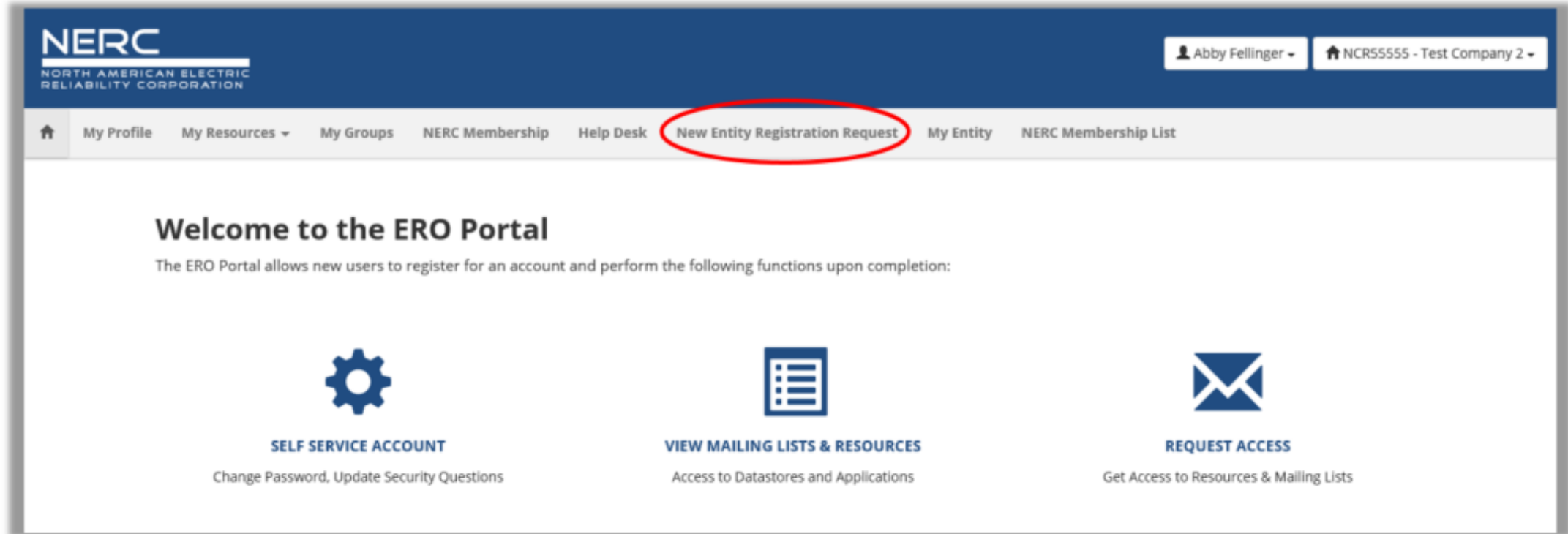
What to Know about CORES

- The Centralized Organization Registration ERO System (CORES) launched on July 15, 2019, to provide consistency and alignment across the ERO for registration activities.
- The CORES platform enables entities to manage their registration information, contact information, and functional relationships from one application.
- All entities seeking to submit a new registration application must register for an ERO Portal account (<https://eroportal.nerc.net/>) and will need to complete the steps for multi-factor authentication that automatically appear when attempting to log into the ERO Portal for the first time.



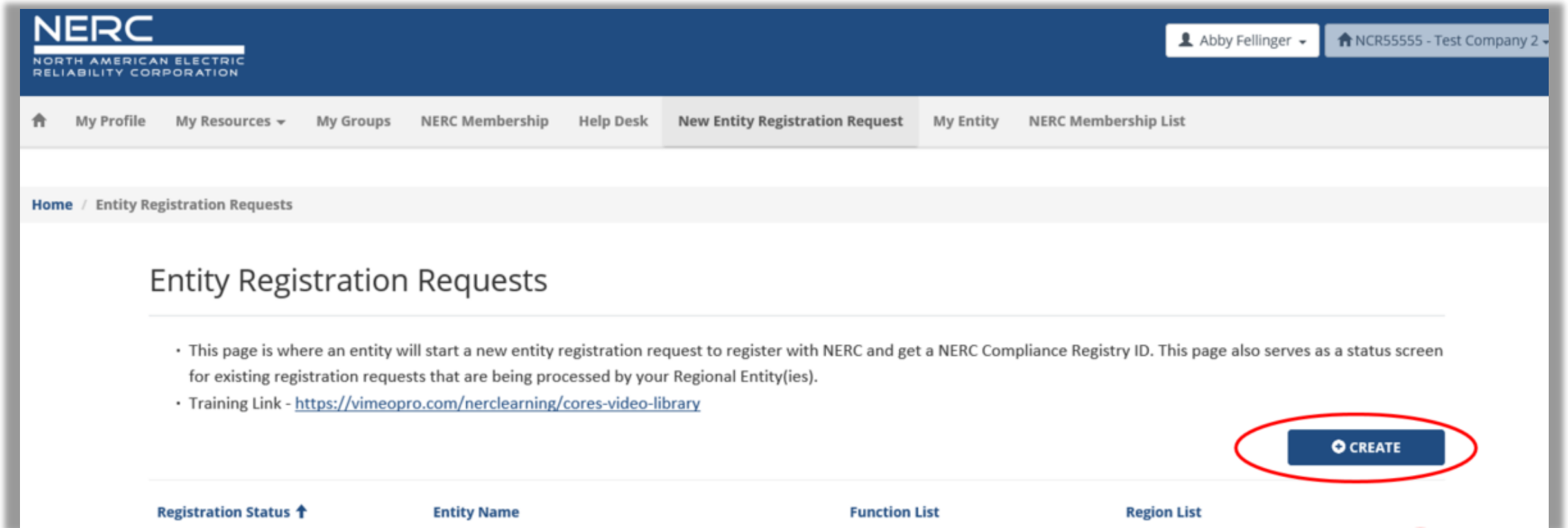
Creating a New Registration Application in CORES

- Log into the ERO Portal (<https://eroportal.nerc.net/>)
- Select the **New Entity Registration Request** tab



Creating a New Registration Application in CORES

- Select the **Create** button to begin a new application



The screenshot displays the NERC (North American Electric Reliability Corporation) CORES web application interface. The top navigation bar includes the NERC logo and user information for Abby Fellinger. The main navigation menu highlights 'New Entity Registration Request'. The page title is 'Entity Registration Requests'. Below the title, there is a list of instructions and a training link. A blue 'CREATE' button is prominently displayed and circled in red, indicating the next step in the process.

NERC
NORTH AMERICAN ELECTRIC
RELIABILITY CORPORATION

Abby Fellinger | NCR55555 - Test Company 2

My Profile | My Resources | My Groups | NERC Membership | Help Desk | **New Entity Registration Request** | My Entity | NERC Membership List

Home / Entity Registration Requests

Entity Registration Requests

- This page is where an entity will start a new entity registration request to register with NERC and get a NERC Compliance Registry ID. This page also serves as a status screen for existing registration requests that are being processed by your Regional Entity(ies).
- Training Link - <https://vimeo.com/nerclearning/cores-video-library>

CREATE

Registration Status ↑ | Entity Name | Function List | Region List

New Entity Registration Request – Basic Information

- Enter applicable information
- Select the **UPDATE BASIC INFORMATION REQUEST** button

Home / Entity Registration Requests / Basic Information

• This form collects basic information about the entity that will register. This includes the name, acronym, and address. Entities are asked to review and upload information regarding NERC Led Review Panel and the BES Exception Process as part of the application.

• [Training Link](#)

Enter the applicable corporate address

Basic Information

Entity Name *	<input type="text" value="Excellent Choice Energy"/>	Street 1 *	<input type="text" value="123 Electric Lane"/>
Acronym	<input type="text" value="ECE"/>	Street 2	<input type="text"/>
Phone	<input type="text" value="888/555-5555"/>	City *	<input type="text" value="Austin"/>
Website	<input type="text" value="http://www.excellentchoiceenergy.com"/>	State/Province *	<input type="text" value="Texas"/>
Has a NERC-Led Panel Request been submitted? *	<input checked="" type="radio"/> No <input type="radio"/> Yes	Zip Code *	<input type="text" value="78746"/>
Has a BES Exception Request been submitted? *	<input checked="" type="radio"/> No <input type="radio"/> Yes	Country *	<input type="text" value="US"/>

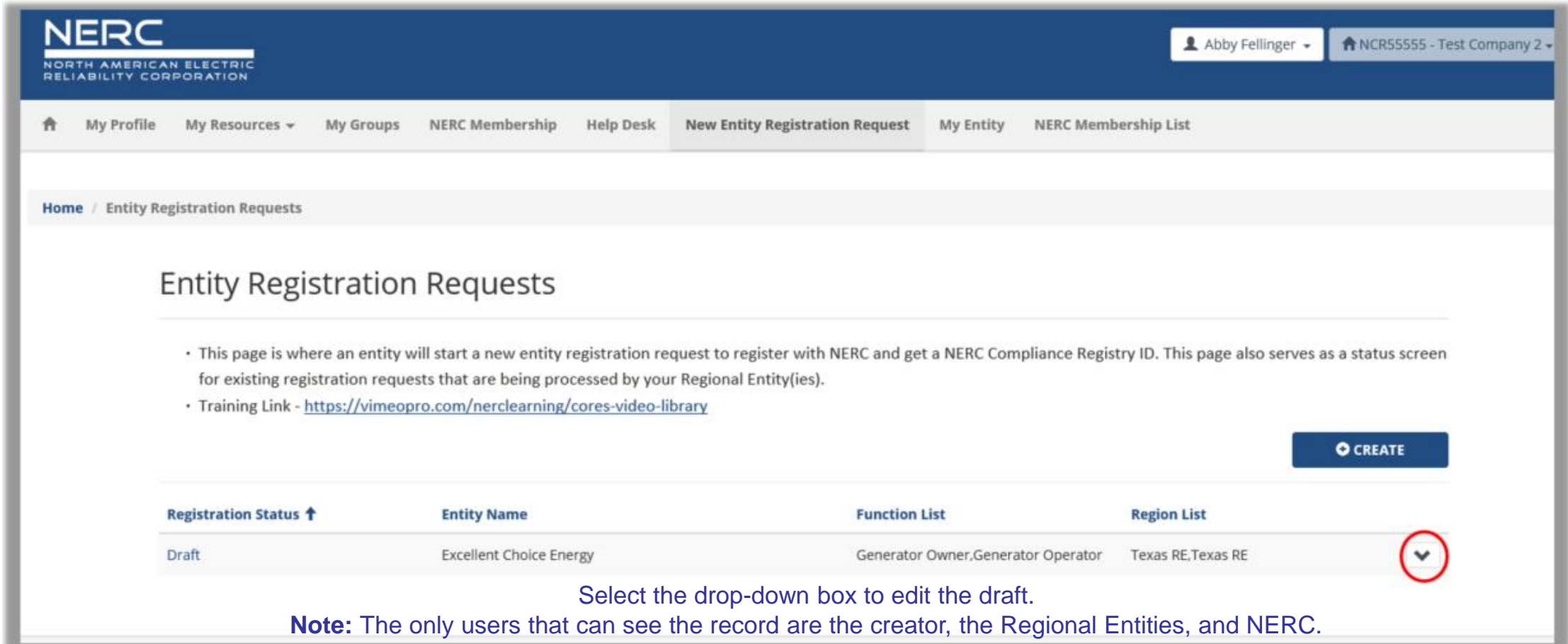
UPDATE BASIC INFORMATION REQUEST

The record will be auto saved after selecting this button.

Basic Information
Upstream Holding Companies
Contacts
Registration Scopes
Functional Mapping
Comments and Attachments
Submit Entity Registration Req

New Entity Registration Request – Draft Application

- The record can be continued or accessed later as a draft



The screenshot displays the NERC (North American Electric Reliability Corporation) web application interface. At the top, the NERC logo is visible on the left, and user information 'Abby Fellingner' and 'NCR55555 - Test Company 2' is shown on the right. A navigation menu includes 'My Profile', 'My Resources', 'My Groups', 'NERC Membership', 'Help Desk', 'New Entity Registration Request' (highlighted), 'My Entity', and 'NERC Membership List'. Below the navigation, a breadcrumb trail shows 'Home / Entity Registration Requests'. The main heading is 'Entity Registration Requests'. A descriptive paragraph explains that this page is for starting new registration requests and serves as a status screen for existing ones. A training link is provided: <https://vimeo.com/nerclearning/cores-video-library>. A 'CREATE' button is located on the right. Below this is a table with columns: 'Registration Status', 'Entity Name', 'Function List', and 'Region List'. A single row is shown with the status 'Draft', entity name 'Excellent Choice Energy', function list 'Generator Owner, Generator Operator', and region list 'Texas RE, Texas RE'. A red circle highlights a drop-down arrow icon in the rightmost column of the table row.

Entity Registration Requests

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CREATE

Registration Status ↑	Entity Name	Function List	Region List
Draft	Excellent Choice Energy	Generator Owner, Generator Operator	Texas RE, Texas RE

Select the drop-down box to edit the draft.

Note: The only users that can see the record are the creator, the Regional Entities, and NERC.

New Entity Registration Request – Upstream Holding Company

- If applicable, enter the top tier Holding Company and NERC registered affiliates

- This form collects information regarding upstream holding companies and other affiliates. There are three types of affiliates that may be entered, including holding company, affiliate, and subsidiary. If your organization is under common control of, or is an organization that has common control over other organizations, please complete this form.
- [Training Link](#)

UPSTREAM HOLDING COMPANIES AND AFFILIATES

Has Companies? *

No Yes

Add Company/Affiliates

Company Type ↑	Company ↑	Entity	NERC Number (Entity)	Description	
Holding Company	AAA			Holding Company	▼

Note: A list of NERC registered entities can be reviewed here: [NCR Active Entities List](#)



Basic Information



Upstream Holding Companies



Contacts



Registration Scopes



Functional Mapping



Comments and Attachments

Submit Entity Registration Req

New Entity Registration Request – Contacts

- Add the following: Primary Compliance Contact, Alternate Compliance Contact, and the Primary Compliance Officer

Home / Entity Registration Requests / Contacts

- This form is where you will enter the contacts for your registering entity.
The two required contacts for registration are Primary Compliance Contact and Primary Compliance Officer.
Primary Compliance Officer and Authorizing Officer are synonymous.
Registered entities may upload a document to describe the mapping between older terms and the new terms on the comment and attachment form.
This form has other voluntary contact types available.
- [Training Link](#)

CONTACTS

[Add Contact](#)

Role Type	Business Phone (Contact)	Mobile Phone (Contact)	Job Title (Contact)	E-mail (Contact)	Address 1 (Contact)	Name (Region)
↑ Contact						

There are no records to display.

Note: Each contact must have an active ERO Portal account.

- Basic Information
- Upstream Holding Companies
- Contacts
- Registration Scopes
- Functional Mapping
- Comments and Attachments
- Submit Entity Registration Req

New Entity Registration Request – Registration Scopes

- Add applicable functions and expected registration date

- This form is used for specifying the functional registrations for your organization as functions are defined in the Registry Criteria under the NERC Rules of Procedure. The function, region, jurisdiction and proposed effective date for the registration are required fields.
- [Training Link](#)

REGISTRATION SCOPES

Add Registration Scope

Function ↑	Region	Effective Date	Regulatory Jurisdiction	Description	Submitted By
Generator Operator	Texas RE	9/1/2019	United States		Abby Fellingner
Generator Owner	Texas RE	9/1/2019	United States		Abby Fellingner

This example applies to a GO/GOP.
The **Proposed Effective Date** and the **Test Power Sync Date** will be the same date.

- ✓ Basic Information
- ✓ Upstream Holding Companies
- ✓ Contacts
- ✓ Registration Scopes
- Functional Mapping
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New Entity Registration Request – Functional Mapping

- Enter entity mapping information

- This form is used for specifying the functional mapping between your entity's functional registrations per the Rules of Procedure and other registered entities.
- [Training Link](#)

FUNCTIONAL MAPPING

Add Mapping

Function	Function Abr.	Region	Entity	NERC Number (Entity)	Notes
Reliability Coordinator	RC	Texas RE	Electric Reliability Council of Texas, Inc.	NCR04056	
Transmission Service Provider	TSP	Texas RE	Electric Reliability Council of Texas, Inc.	NCR04056	
Planning Authority	PA	Texas RE	Electric Reliability Council of Texas, Inc.	NCR04056	This function will be
Balancing Authority	BA	Texas RE	Electric Reliability Council of Texas, Inc.	NCR04056	



Basic Information



Upstream Holding Companies



Contacts



Registration Scopes



Functional Mapping



Comments and Attachments

Submit Entity Registration Req

This example applies to a GO/GOP. The entity would also map to its TO, TOP, and TP for this scenario.

New Entity Registration Request – Comments & Attachments

- Upload all applicable documents

- This form is used for specifying comments and attachments related to the registration.
- [Attachments Link](#)
- [Training Link](#)

COMMENTS & ATTACHMENTS

Add Comment or Attachment

Comment	Created On ↑	Modified On	Modified By (Portal User)
GO/GOP Spreadsheet	8/25/2019 10:36 PM	8/25/2019 10:36 PM	Abby Fellingner
One-line	8/25/2019 10:37 PM	8/25/2019 10:37 PM	Abby Fellingner
Interconnect Agreement	8/25/2019 10:37 PM	8/25/2019 10:37 PM	Abby Fellingner
RARF	8/25/2019 10:37 PM	8/25/2019 10:37 PM	Abby Fellingner

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✓	Basic Information
✓	Upstream Holding Companies
✓	Contacts
✓	Registration Scopes
✓	Functional Mapping
✓	Comments and Attachments
	Submit Entity Registration Req

The [CORES Application Worksheet](#) includes a list of documents that must be submitted to Texas RE.

New Entity Registration Request – Submit Entity Registration

- Review the application and **Click to Submit Entity Registration** button

APPROVAL STATUS

Approval Type	Created On ↑	Entity	Entity Registration Request	Regional Administration	Return Date	Submitted By
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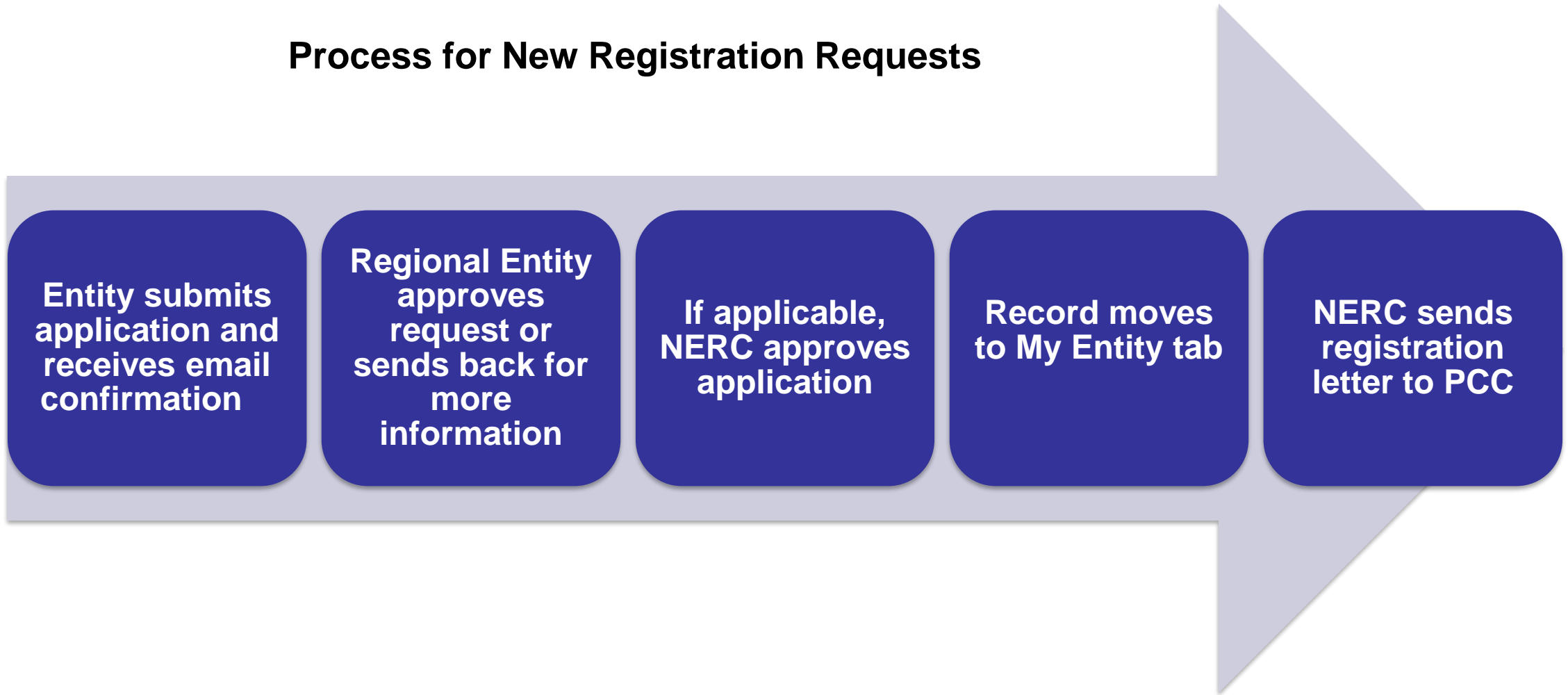
There are no records to display.

[Click to Submit Entity Registration](#)

✓	Basic Information
✓	Upstream Holding Companies
✓	Contacts
✓	Registration Scopes
✓	Functional Mapping
✓	Comments and Attachments
	Submit Entity Registration Req

New Entity Registration Request – Process Flow

Process for New Registration Requests



Available CORES Resources

CORES Video Library: <https://vimeopro.com/nerclearning/cores-video-library/page/1>

NERC Project Page: <https://www.nerc.com/pa/comp/Pages/CORESTechnologyProject.aspx>

Texas RE Registration: <https://www.texasre.org/Pages/registration.aspx>

- Includes link to CORES Application Worksheet



Contact

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