
Texas RE CORES Validation Instruction Guide

The Centralized Organization Registration ERO System (CORES) was developed 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.

The purpose of this instructional guide is to provide our registered entity users with some essential information and guidance to use when reviewing, validating, and entering their registration data within the CORES platform. These instructions are intended to improve the CORES user experience and help guide users through the process to ensure their data is complete and consistently applied throughout the Texas RE region.

Texas RE is requesting that all registered entities complete their data validation review and entry of new required registration sections in CORES by no later than **June 1, 2020**.

Access to CORES via the ERO Portal

The CORES application is hosted on the [ERO Portal](#). If it is your first time using the ERO Portal, follow the prompts to create an account. All entities seeking to submit a new registration or change request to Texas RE will need to register for an ERO Portal account in order to access CORES. If you have questions or problems concerning your ERO Portal account, please submit a [support ticket](#).

The ERO Portal requires entities to establish Multi-Factor Authentication (MFA) through prompts that automatically appear when attempting to log into the ERO Portal for the first time. If you have not yet registered for MFA, the MFA Quick Start Guide can be found [here](#).

Data Migration and Validation (First steps)

In an effort to simplify and expedite the data transfer process in CORES, NERC has migrated all existing registration data from the Compliance Reporting and Tracking System (CRATS) to the new CORES registration tool for the registered entities.

As of March 2020, CORES is available to all registered entities. It is imperative that a representative from each registered entity logs in to CORES (via the ERO Portal) and validates their current data sets for completeness and accuracy. Once logged into the ERO Portal, use the “My Entity” tab at the top of the page to review the entity registration information that was migrated into CORES. Verify that the information contained in the following sections is complete and accurate.

- Basic Information (address, phone, etc.)
- Contacts (fields are not currently editable)

- Entity Scopes (Functional Registrations)
- MRRE Coordinated Oversight (does not apply to all entities and fields are not editable)
- CFR Agreements (does not apply to all entities)
- JRO Agreements (does not apply to all entities)

Please refer to additional instructions listed below pertaining to specific data requests needed to complete the registration in CORES for “Upstream Holding Companies,” “Functional Mapping,” “Contacts” and “Documents and Comments.”

You may use the “My Entity” tab to manage and update entity information as needed. If you discover any major discrepancies or significant errors in your data, please contact [Texas RE Registration](#) immediately for assistance.

Upstream Holding Companies

The ERO is looking to better understand the relationships between the Upstream Holding Companies and their NERC registered affiliates. For the purposes of CORES, a “Holding Company” is defined as a parent corporation, Limited Liability Company, limited partnership or other form that has registered entities in the same corporate family in which it controls their policies and oversee its management decisions. Accordingly, a new section has been added in CORES and will be used to document these relationships.

Texas RE is asking that all registered entities provide us with the Holding Company for each registered entity being reviewed and updated. The Upstream Holding Company may be a registered entity or a non-registered entity. If an entity does not have an Upstream Holding Company, answer “No” to the question in CORES and move to next section. Additionally, Texas RE would like all registered entities to enter all of their NERC registered affiliates within this section. If your entity has a large number of NERC registered affiliates, an affiliate list can be uploaded under the Comments and Documents section.

To learn more about the steps necessary to complete this section, we recommend that you watch the [CORES video about Upstream Holding Companies](#) prior to completing this section.

Functional Mapping in CORES

Pursuant with the NERC Rules of Procedures (RoP), Section 500, 1.4-1.44, the regions are responsible for understanding all functional relationships between entities and to “ensure that no areas are lacking any entities to perform the duties and tasks identified in and required by the Reliability Standards to the fullest extent as practical and there is no unnecessary duplication of such coverage or of required oversight of such coverage.” The RoP go on to specifically define what these relationships are in more detail. Accordingly, the regions maintain individual regional

lists of these functional relationships between the entities and ensure that this “mapping” is complete and accurate to the fullest extent as practical.

In CORES, there is a new section dedicated to understanding the functional relationships between the registered entities. Texas RE currently maintains all entity mapping information in webCDMS. However, the functional relationships will be migrated to CORES at a later date. As a result, functional mapping does not need to be entered into CORES for Texas RE registered entities.

IMPORTANT: Temporary Contact Change Process

Until further notice, any changes made to Compliance Contacts (PCC, ACC, PCO, etc.) will be made in your current legacy compliance portals (webCDMS for Texas RE) and NOT in CORES. Registered entities will be blocked from making any such changes to compliance contacts in the CORES tool until such a date or time that NERC or Regions notify registered entities that they can begin making these changes in the CORES system.

Uploading Registration Documentation in CORES

When conducting your review and data validation in “Comments/Attachments” section of CORES, you will notice that no registration documents have been uploaded to the CORES system. Texas RE is requesting that registered entities provide the following information when the validation process has been completed.

- A list of NERC registered affiliates (if applicable)
- A comment or document with the results of the registered entity’s validation findings

IMPORTANT: In the “Comments/Attachments” section of CORES we ask that each document that is uploaded into CORES be clearly titled (named) by selecting the “Add Comment” button and entering the name of the document(s). This will not only provide us with critical metadata for each document, but it will also help the region and registered entities be able to clearly identify documents in CORES and avoid any confusion between potentially similarly titled documentation maintained in the CORES system.

Additional Information

Prior to submitting an application in the CORES tool, please contact Abby Fellingner at 512-583-4927 or e-mail [Texas RE Registration](#) to discuss all new registration requests or upcoming registration changes.

Texas RE will gladly answer any questions you may have related to your registration request, and we will help guide you through the process.