



TEXAS RE

Ensuring electric reliability for Texans

CORES

CENTRALIZED ORGANIZATION REGISTRATION ERO SYSTEM

Submitting a New Registration Request

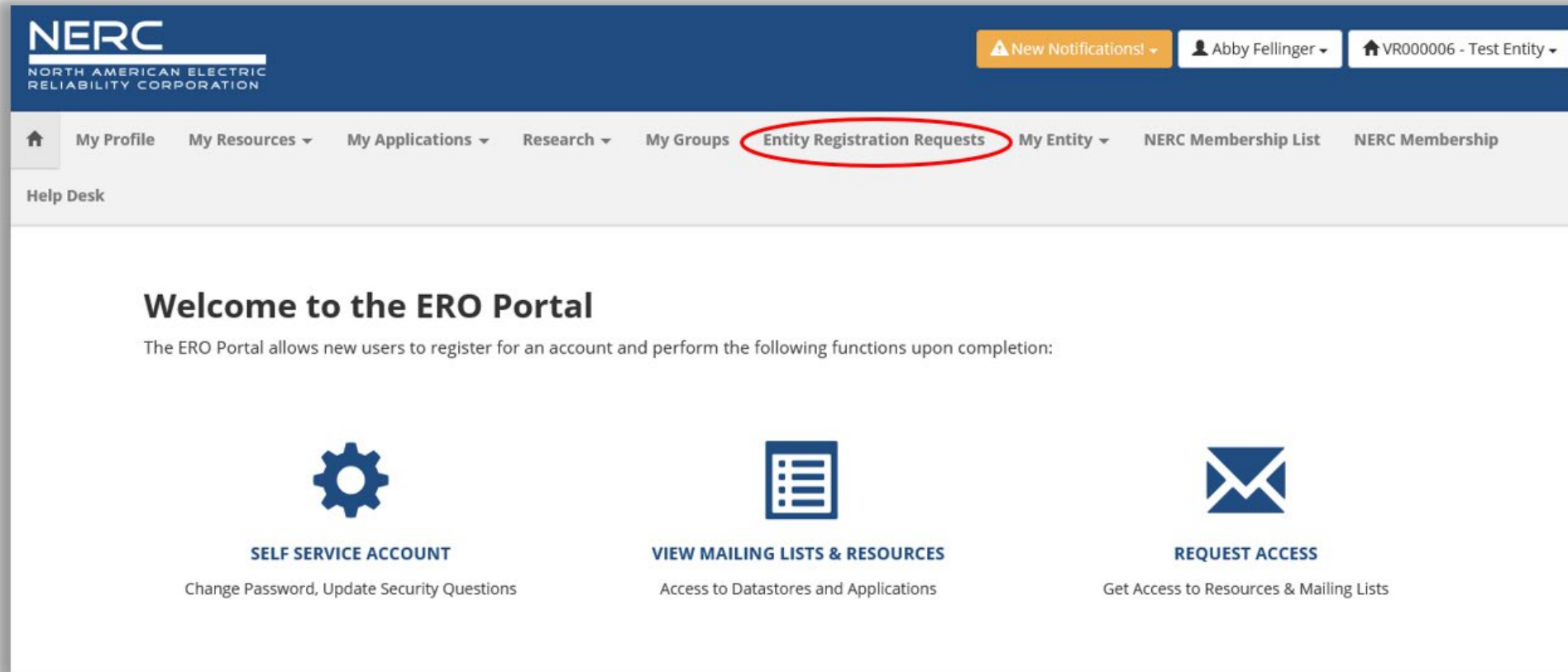
What to Know about CORES

- 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

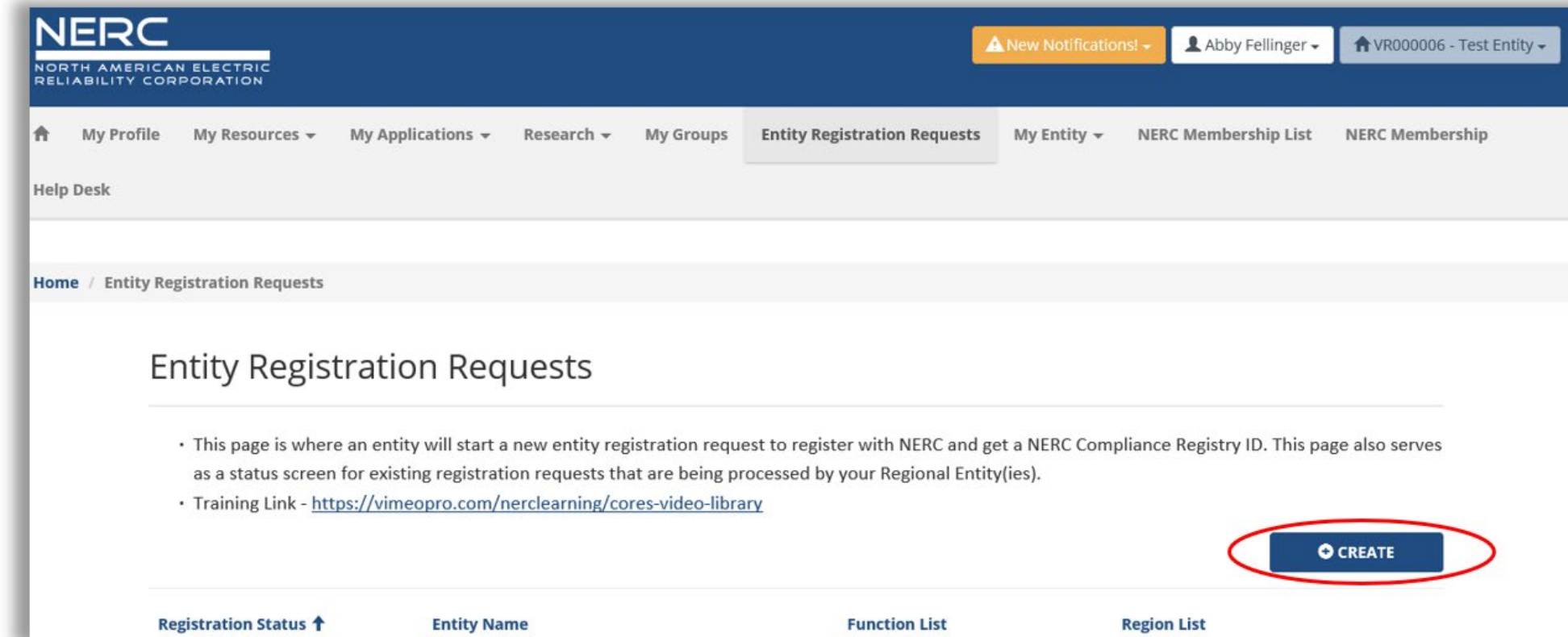
- Log into the ERO Portal (<https://eroportal.nerc.net/>)
- Select the **Entity Registration Requests** tab



The screenshot displays the NERC ERO Portal interface. At the top left is the NERC logo (North American Electric Reliability Corporation). The top right shows a notification bell icon with 'New Notifications!', a user profile for 'Abby Fellingner', and a home icon with 'VR000006 - Test Entity'. The main navigation bar includes: Home, My Profile, My Resources, My Applications, Research, My Groups, **Entity Registration Requests** (circled in red), My Entity, NERC Membership List, and NERC Membership. Below the navigation bar is a 'Help Desk' link. The main content area features a 'Welcome to the ERO Portal' heading, followed by a paragraph: 'The ERO Portal allows new users to register for an account and perform the following functions upon completion:'. Three service cards are displayed: 1. 'SELF SERVICE ACCOUNT' with a gear icon, description: 'Change Password, Update Security Questions'. 2. 'VIEW MAILING LISTS & RESOURCES' with a document icon, description: 'Access to Datastores and Applications'. 3. 'REQUEST ACCESS' with an envelope icon, description: 'Get Access to Resources & Mailing Lists'.

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. At the top, the NERC logo is visible on the left, and user information including 'New Notifications!', 'Abby Fellingner', and 'VR000006 - Test Entity' is on the right. A navigation menu below the header includes 'My Profile', 'My Resources', 'My Applications', 'Research', 'My Groups', 'Entity Registration Requests' (which is highlighted), 'My Entity', 'NERC Membership List', and 'NERC Membership'. Below the navigation is a 'Help Desk' link. The main content area is titled 'Entity Registration Requests' and contains two bullet points: '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).' and 'Training Link - <https://vimeopro.com/nerclearning/cores-video-library>'. A blue 'CREATE' button with a plus icon is circled in red in the bottom right corner of the main content area. At the bottom of the page, there are four column headers: 'Registration Status ↑', 'Entity Name', 'Function List', and 'Region List'.

New Entity Registration Request – Basic Information

- Enter applicable information

Basic Information [Enter the corporate address.](#)

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

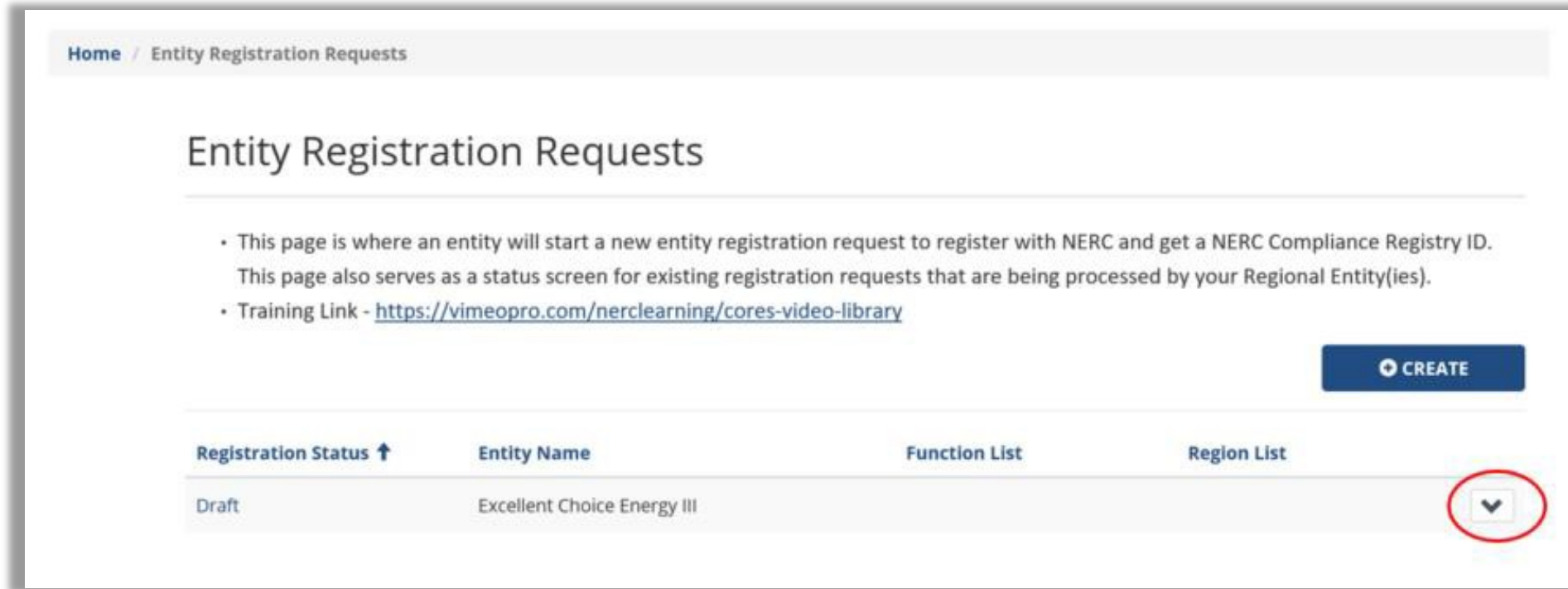
UPDATE BASIC INFORMATION REQUEST

The record will be auto saved after selecting the **Update Basic Information Request** 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 shows a web interface for "Entity Registration Requests". At the top, there is a breadcrumb "Home / Entity Registration Requests". Below this is the main heading "Entity Registration Requests". A descriptive paragraph explains that this page is for starting new requests and checking the status of existing ones. A "CREATE" button is visible on the right. Below the text is a table with columns for "Registration Status", "Entity Name", "Function List", and "Region List". One row is shown with "Draft" status and "Excellent Choice Energy III" as the entity name. A red circle highlights a drop-down arrow icon in the "Region List" column for this row.

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://vimeopro.com/nerclearning/cores-video-library>

CREATE

Registration Status ↑	Entity Name	Function List	Region List
Draft	Excellent Choice Energy III		▼

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

UPSTREAM HOLDING COMPANIES AND AFFILIATES

Has Companies? *
 No Yes

[Add Company/Affiliates](#)

Company Type ↑	Non Registered Entity ↑	Registered Entity	NERC Number (Registered Entity)	Description	
Affiliate		Test Company 2	NCR55555	NERC Affiliate	▼
Holding Company	AAA			Holding Company	▼

✓ Basic Information

✓ Upstream Holding Companies

○ Contacts

○ Registration Scopes

○ Functional Mapping

○ Comments and Attachments

Submit Entity Registration Req

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

New Entity Registration Request – Contacts

- Add the following: Primary Compliance Contact, Alternate Compliance Contact(s), 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

REGISTRATION SCOPES

[Add Registration Scope](#)

Function ↑	Region	Effective Date	Regulatory Jurisdiction	Description	Submitted By
Generator Operator	Texas RE	5/15/2020	United States		Abby Fellingner <input type="button" value="v"/>
Generator Owner	Texas RE	5/15/2020	United States		Abby Fellingner <input type="button" value="v"/>

✓

✓

✓

✓

○

○

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 Commercial Operation Date (COD) should be entered as the **Proposed Effective Date** for registration.

New Entity Registration Request – Functional Mapping

- Enter Functional Mapping
- For example, a GO would map to its BA, GOP, PC/PA, TO, TOP, TP, and RC



Function	Function Abr.	Region	Entity	NERC Number (Entity)	Notes	Created On ↑
Balancing Authority	BA	Texas RE	Electric Reliability Council of Texas, Inc.	NCR04056		4/8/2020 12:44 PM

Balancing Authority (BA)	>	RC						
Distribution Provider (DP)	>	BA	PC/PA	TOP	RC			
Distribution Provider - UFLS Only (DP-UFLS)	>	PC/PA						
Generator Owner (GO)	>	BA	GOP	PC/PA	RC	TO	TOP	TP
Generator Operator (GOP)	>	BA	RC	TOP				
Planning Coordinator and Planning Authority (PC/PA)	>	RC						
Transmission Owner (TO)	>	PC/PA	RC	TOP	TP			
Transmission Operator (TOP)	>	BA	RC					
Transmission Planner (TP)	>	PC/PA	RC					

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

< 1 2 >

✓	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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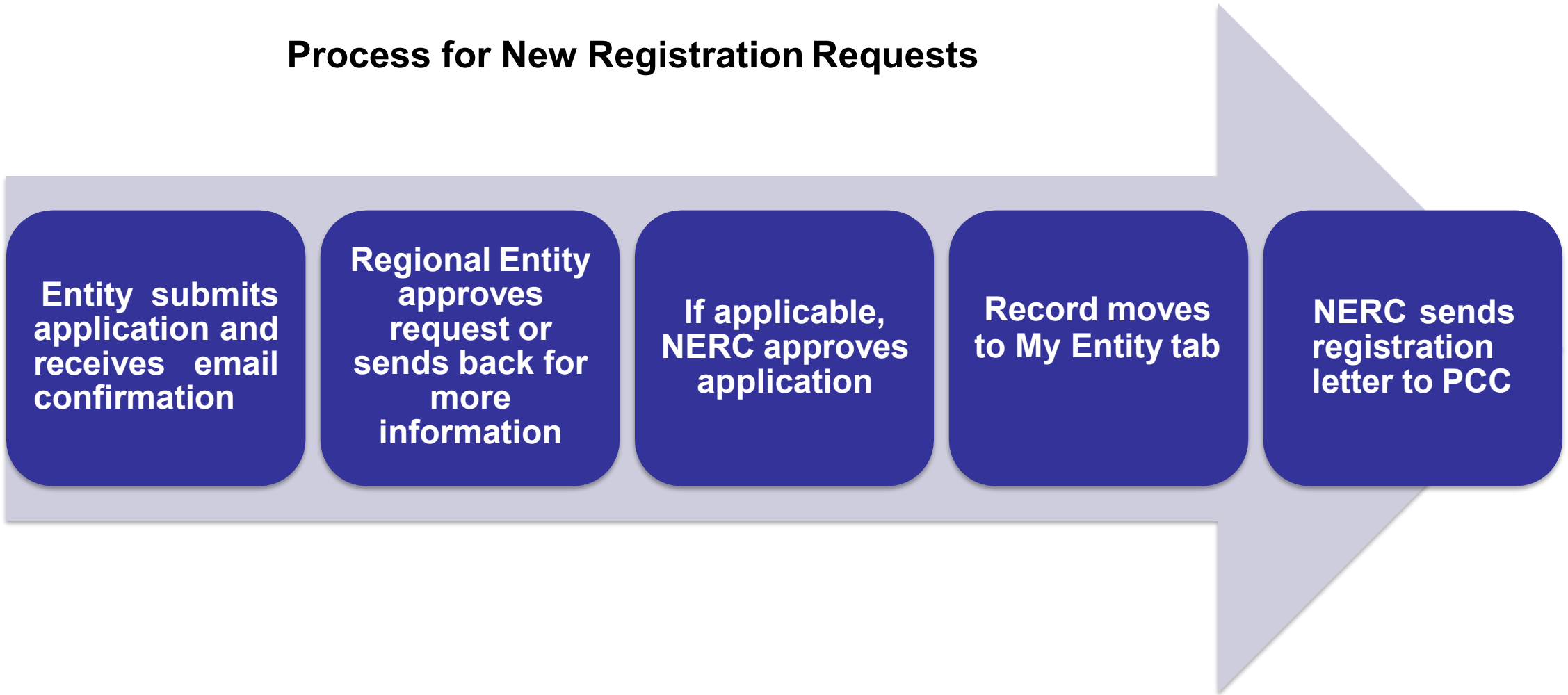
There are no records to display.

[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](#)

[CORES End User Guide](#)

[Texas RE Registration Website](#)

- Includes link to CORES Application Worksheet



Contact

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