

NERC

NORTH AMERICAN ELECTRIC
RELIABILITY CORPORATION

NERC Membership Renewal

End User Guide

July 2021

RELIABILITY | RESILIENCE | SECURITY



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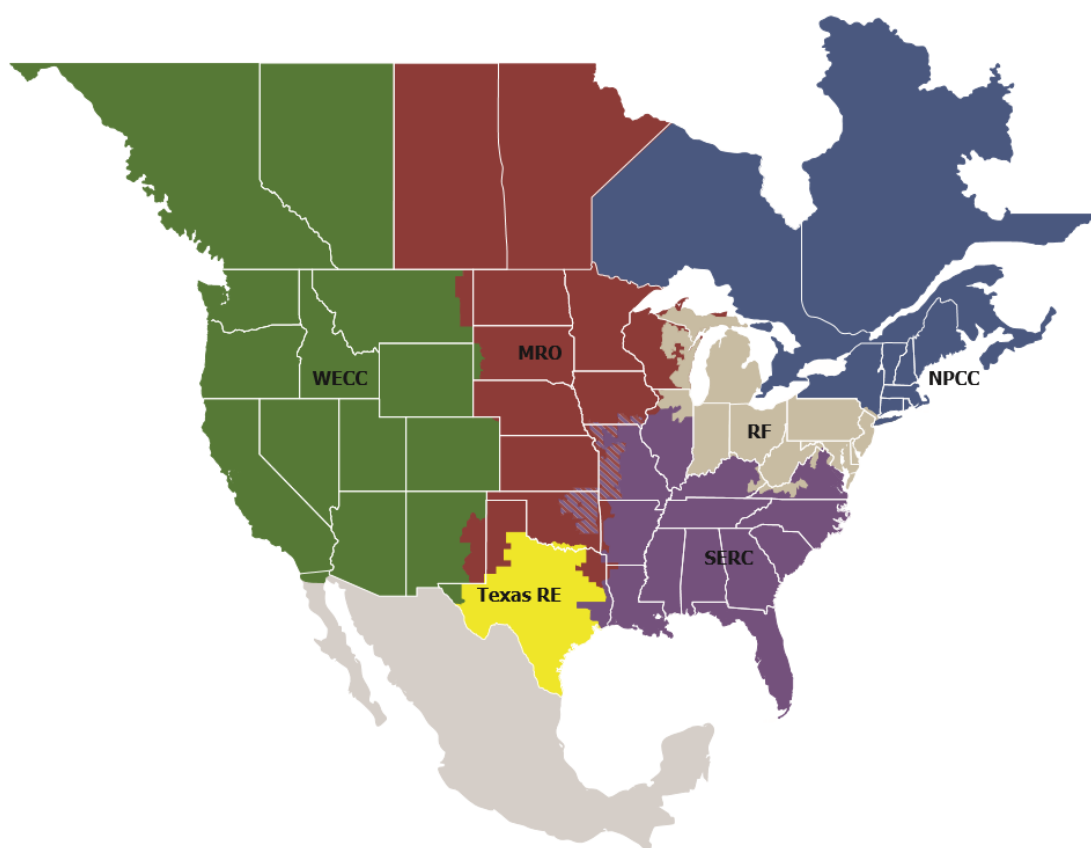
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Preface

Electricity is a key component of the fabric of modern society and the Electric Reliability Organization (ERO) Enterprise serves to strengthen that fabric. The vision for the ERO Enterprise, which is comprised of the North American Electric Reliability Corporation (NERC) and the six Regional Entities (REs), is a highly reliable and secure North American bulk power system (BPS). Our mission is to assure the effective and efficient reduction of risks to the reliability and security of the grid.

Reliability | Resilience | Security
Because nearly 400 million citizens in North America are counting on us

The North American BPS is made up of six RE boundaries as shown in the map and corresponding table below. The multicolored area denotes overlap as some load-serving entities participate in one RE while associated Transmission Owners (TOs)/Operators (TOPs) participate in another.



MRO	Midwest Reliability Organization
NPCC	Northeast Power Coordinating Council
RF	ReliabilityFirst
SERC	SERC Reliability Corporation
Texas RE	Texas Reliability Entity
WECC	WECC

Introduction

Membership in NERC is free, voluntary, and open to any person or entity with an interest in the reliable operation of the North American bulk power system who submits an application and maintains his or her membership in accordance with Article II of NERC's bylaws. Each member will join one of 13 membership sectors. Members of Sectors 1-12 are eligible to participate in the annual nomination and election of members to the NERC Member Representatives Committee (MRC). A member of Sector 13 may serve as a representative of another sector on the MRC at the request of that sector. The MRC elects NERC's independent trustees, votes on amendments to the Bylaws, and provides advice and recommendations to the Board with respect to the development of annual budgets, business plans and funding mechanisms, and other matters pertinent to the purpose and operations of NERC.

Pursuant to Article II, Section of NERC's Bylaws, from time to time, the board shall establish a date by which members shall submit their registration renewals. All members shall be required to renew their registrations within 30 calendar days of a request by the secretary of the Corporation, using a registration renewal form prescribed by the board. The secretary of the Corporation shall remove from the roster of members of the Corporation any member that has not submitted a registration renewal within 30 days following a date established by the board. The secretary shall notify any member that is removed from the roster of members of such removal, by notice sent to such former member's last known address on the records of the Corporation.

The renewal process is explained in more detail below. Screen shots are added for clarity.

By completing the membership renewal process, each member confirms its continued acceptance of the terms and conditions for membership in NERC. Additionally, by completing this process, each member agrees that NERC may share primary and alternate contact information with other members in the sector for NERC membership communications.

Chapter 1: ERO Portal Access

ERO Portal Access

The membership renewal process takes place in the ERO Portal.

Sign In to the ERO Portal (<https://eroportal.nerc.net>)



Trouble Logging In?

If you do not remember your user name or password, please submit a ticket to the NERC Membership Team through the 'Help Desk' tab located in the upper left hand corner of the ERO Portal.



Welcome to the ERO Portal

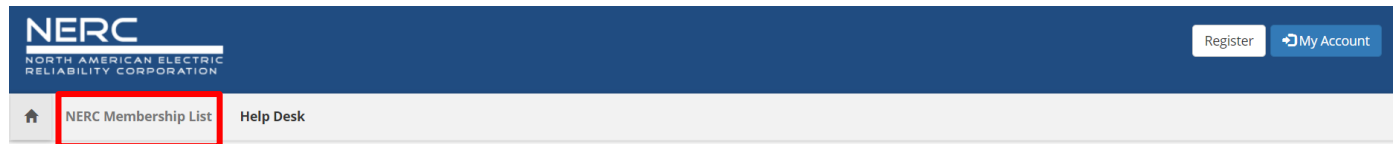
The ERO Portal allows new users to register for an account and perform the following functions upon completion:

Please note that, due to higher than usual volume, it may take several business days to respond a request for assistance that is submitted during the renewal period.

Chapter 2: NERC Membership List

Confirming Membership Accounts

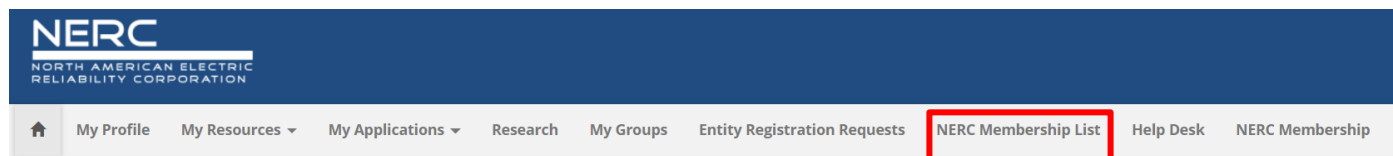
The NERC Membership list contains all entities that are current members of the NERC. This list can be accessed by navigating to the ERO Portal and clicking on 'NERC Membership List'.



Welcome to the ERO Portal

The ERO Portal allows new users to register for an account and perform the following functions upon completion:

Figure 2.1: View, while logged out



Welcome to the ERO Portal

The ERO Portal allows new users to register for an account and perform the following functions upon completion:

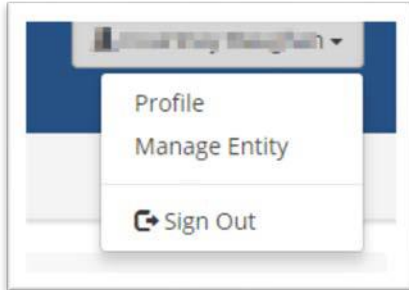
Figure 2.2: View while logged in

NOTE: NERC members are only allowed to join one sector. NERC considers a corporation and its affiliates as a single member. Before completing the membership renewal process, each member entity should review this list to ensure that the entity (including its affiliates) do not have more than one (1) NERC membership account. If recent organizational changes have resulted in a member entity having more than one (1) account, please withdraw the account during the renewal process (instructions below). You may also contact NERC membership (nercmembership@nerc.net) for assistance in deactivating the extra account(s).

Chapter 3: Managing Profile

Updating Contact Information

To update contact information, click on name located in the upper right corner and select 'Profile'

A screenshot of the NERC Profile page. The page has a blue header bar with 'Home / Profile' links. The main content area is titled 'Profile' and contains a sidebar on the left with links for 'Courtney Baughan', 'Profile', 'Manage Entity', 'Security', 'Change Password', 'Change Email', and 'Change Security Questions'. The main content area has a 'Your Information' section with fields for 'Salutation' (Ms), 'First Name' (Courtney), 'Middle Name', 'Last Name' (Baughan), 'Company' (Northampton Electric Reliability Corporation), 'Job Title' (Senior Legal Assistant), 'Business Phone' (413-555-1234), 'Mobile Phone', and 'Fax'. A note at the top of the main content area states: 'On this self service page, you can change your password, email address, or security questions. In addition you may also update your demographic information such as phone number and address. Please note, if you are the Primary Compliance Contact for an entity registered for NERC compliance, you will not be able to change your profile information here. You must navigate to your regional compliance portal to update your information. You will see those changes reflected here the day after you make the update.'

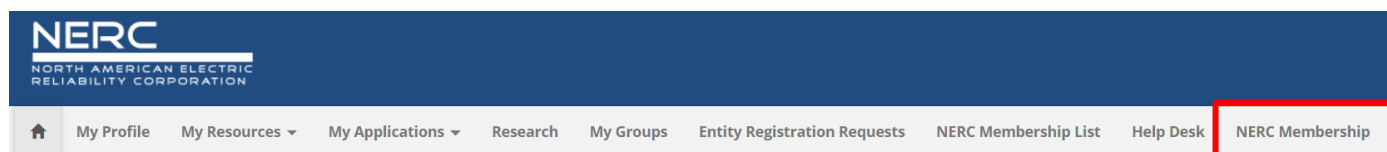
Chapter 4: Membership Renewal

Locating Membership Record

Individual or Entity membership records are located under the tab labeled 'NERC Membership'

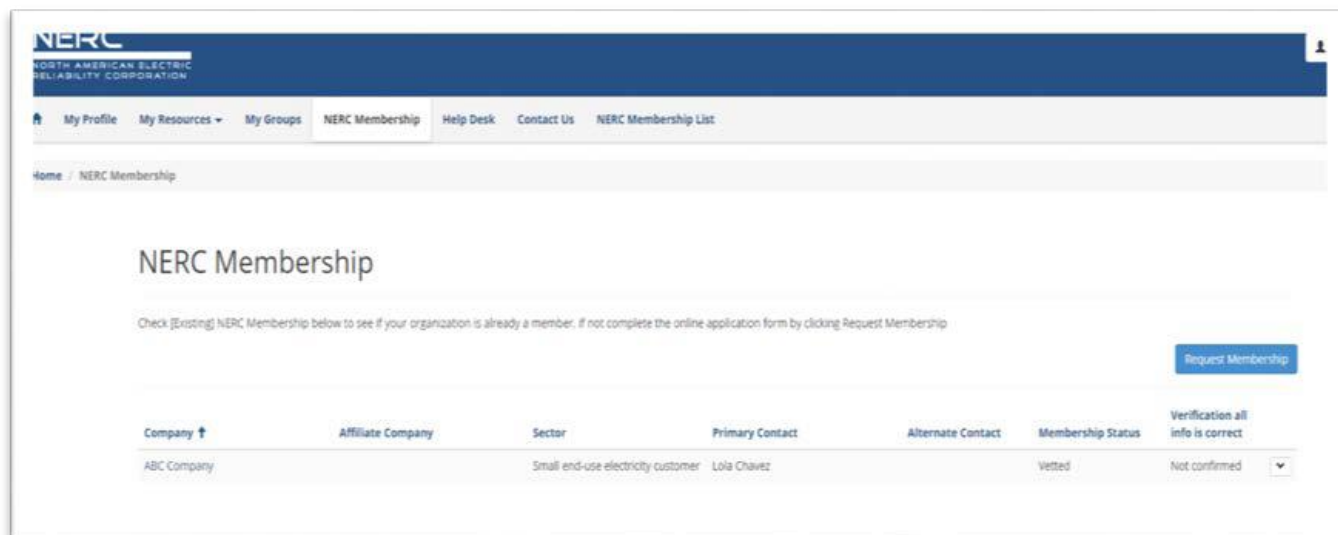
Membership record is located at the bottom half of the page. (***DO NOT CHOOSE THE OPTION TO REQUEST MEMBERSHIP, OPTION IS ONLY FOR NEW INDIVIDUALS OR ENTITIES SEEKING MEMBERSHIP WITH NERC**)

Only the primary and alternate contacts will have access to the membership record. If both the primary and alternate are unavailable, please contact the **ERO Portal Help Desk** (<https://support.nerc.net/>) to have the contact information reset.



Welcome to the ERO Portal

The ERO Portal allows new users to register for an account and perform the following functions upon completion:



Membership Fields

Membership Status

The following statuses may show under Membership Status:

- Vetted – the membership has been vetted and is active
- Not Vetted – the membership has not been vetted yet
- Pending Add'l Information – this indicates that there is additional information required by the user to complete the membership.
- Rejected – the application for membership has been reviewed and rejected

Verification all info is correct

This indicates whether the NERC membership is renewed or not. Status will show as:

- Not Confirmed – Membership not renewed
- Confirmed – Membership renewed

Please note that during renewal period all records are set to 'Not Confirmed' until renewal is completed by individual or entity. Please see below for additional details.

Membership Actions

There are two (2) actions that can be taken for each individual membership record, accessed by clicking the icon on the far right of the record:

- **Edit Membership** – This will enable the member to view and edit membership record for editing.
- **Withdraw** – This will enable the member to withdraw their membership, regardless of its state ('Vetted', 'Not Vetted', etc.).

NOTE: After the user confirms the intent to withdraw the membership, the membership record will be removed from the system and will become inaccessible. The user may request to re-join NERC membership at any time by submitting a new membership request.

The screenshot shows the NERC Membership portal. At the top, there is a navigation bar with links: My Profile, My Resources, My Groups, NERC Membership, Help Desk, Contact Us, and NERC Membership List. Below the navigation bar, there is a section titled "NERC Membership" with a sub-header "Check (Existing) NERC Membership below to see if your organization is already a member. If not, complete the online application form by clicking Request Membership." To the right of this text is a blue button labeled "Request Membership". Below this is a table with the following columns: Company, Affiliate Company, Sector, Primary Contact, Alternate Contact, Membership Status, and Verification all info is correct. The table contains one row with the following data: ABC Company, (blank), Small end-use electricity customer, Lisa Chavez, (blank), Vetted, and Not confirmed. To the right of the "Not confirmed" status is a dropdown menu with a downward arrow. Below the table, there is a small icon of a document with a pencil, labeled "Edit".

Company	Affiliate Company	Sector	Primary Contact	Alternate Contact	Membership Status	Verification all info is correct
ABC Company		Small end-use electricity customer	Lisa Chavez		Vetted	Not confirmed

Edit Membership

During membership renewal, members will have the ability to edit all sections of the NERC Membership Profile:

1. **Company** – If the company needs to be modified, please do so in the ‘My Profile’ section of the primary contact’s ERO Portal record. Alternate contacts do not have the permissions to change record.
2. **Affiliate Company** – Modify the same as Company. The affiliate must be different then the company selected above.
3. **Sector**: To change the sector please click on the magnifying glass and choose from available options. *See Appendix 1* for full descriptions of Sectors 1-13. *Note: These sector definitions were revised effective April 2021.*
4. **Sector Justification** – Please enter a sentence or two justifying why the individual or entity meets the criteria for Sector membership. *Note: The NERC Membership Team may contact you for additional information to support your sector selection, if necessary.*
5. **Primary / Alternate Contact**
 - a. The Primary and Alternate contacts must be different people.
 - b. With the exception of Sector 13 (Associate), you **MUST** have a primary and alternate listed on the membership profile.
 - c. In order to change a primary or alternate contact, that contact must be a registered user in the ERO Portal. In order to register, simply navigate to the ERO Portal, click on ‘register’ in the upper right- hand corner and follow the self-service registration process.
 - d. To change the primary or alternate contact, please click on the magnifying glass located next to the individuals name and type in full name of replacement in search bar and click enter. Select name from drop down options and click select.

Full Name	E-mail	Business Phone	Company Name	Address 1: City	Address 1: Phone
Lola Chavez	lola.chavez@nerc.org	2125555555		DC	

6. **All information on my profile is correct** – If there are no changes required, simply check the box labeled ‘All information on my profile is correct’ and click ‘Update’.
- This indicates that all information on the membership record is correct.
 - Once update is completed, please return back to ‘NERC Membership’ page. **Verification all in is correct** should be set to ‘Confirmed’.
 - You will not receive an email of confirmation, please email NERC Membership (nercmembership@nerc.net) for further verification needs.

Company ↑	Affiliate Company	Sector	Primary Contact	Alternate Contact	Membership Status	Verification all info is correct
ABC Company		Small end-use electricity customer	Lola Chavez	Cynthia Rodriguez	Vetted	Confirmed

Need Assistance?

Questions regarding the renewal process may be directed to the NERC Membership Team (nercmembership@nerc.net).

For technical assistance with the ERO Portal, including password assistance, please contact the ERO Portal Help Desk (<https://support.nerc.net/>).

Appendix A: NERC Membership Sector Descriptions

Membership Sectors

The NERC Bylaws provide for thirteen (13) membership sectors. Please note that these sector descriptions were recently revised, effective April 2021. The current NERC membership sector descriptions are provided below.

Renewing members may remain in their current NERC membership sector only if they meet the currently effective criteria for that sector. Individuals or entities that do not meet the criteria for any of the sectors 1-12 may renew their NERC membership under Sector 13, Associate.

Sector 1 — Investor-owned utility

This Sector includes any investor-owned entity with a substantial business interest in ownership and/or operation in any of the asset categories of generation, transmission or distribution. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects.

Sector 2 — State/municipal utility

This Sector includes any entity owned by or subject to the governmental authority of a state or municipality, that is engaged in the generation, delivery, and/or sale of electric power to end-use customers primarily within the political boundaries of the state or municipality; and any entity, whose members are municipalities, formed under state law for the purpose of generating, transmitting, or purchasing electricity for sale at wholesale to their members. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects.

Sector 3 — Cooperative utility

This Sector includes any non-governmental entity that is incorporated under the laws of the state in which it operates, is owned by and provides electric service to end-use customers at cost, and is governed by a Board of directors that is elected by the membership of the entity; and any non-governmental entity owned by and which provides generation and/or transmission service to such entities. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects.

Sector 4 — Federal or provincial utility/Federal Power Marketing Administration

This Sector includes any U.S. federal, Canadian provincial, or Mexican entity that owns and/or operates electric facilities in any of the asset categories of generation, transmission, or distribution; or that functions as a power marketer or power marketing administrator. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects.

Sector 5 — Transmission-dependent utility

This Sector includes any entity with a regulatory, contractual, or other legal obligation to serve wholesale aggregators or customers or end-use customers and that depends primarily on the transmission systems of third parties to provide this service. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects.

Sector 6 — Merchant electricity generator

This Sector includes any entity that owns or operates an electricity generating facility that is not included in an investor-owned utility's rate base and that does not otherwise fall within any of sectors (1) through (5). This Sector includes but is not limited to cogenerators, small power producers, and all other nonutility electricity producers such

as exempt wholesale generators who sell electricity at wholesale. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects.

Sector 7 — Electricity marketer

This Sector includes any entity that is engaged in the activity of buying and selling of wholesale electric power in North America on a physical or financial basis. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects.

Sector 8 — Large end-use electricity customer

This Sector includes any entity in North America with at least one service delivery taken at 50 kV or higher (radial supply or facilities dedicated to serve customers) that is not purchased for resale; and any single end-use customer with an average aggregated service load (not purchased for resale) of at least 50,000 MWh annually, excluding cogeneration or other back feed to the serving utility. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects.

Sector 9 — Small end-use electricity customer

This Sector includes persons or entities such as associations, state consumer advocates, or other advocacy organizations that represent the collective interests of groups of electricity end users that take service below 50 kV or have an average aggregated service load (not purchased for resale) of less than 50,000 MWh annually, excluding cogeneration or other back feed to the serving utility. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects. Any individual or entity providing products or services within the previous twelve (12) months related to Bulk Power System reliability to an entity eligible to join another Sector cannot join this Sector.

Sector 10 — Independent system operator/regional transmission organization

This Sector includes any entity authorized by the Federal Energy Regulatory Commission to function as an independent transmission system operator, a regional transmission organization, or a similar organization; comparable entities in Canada and Mexico; the Electric Reliability Council of Texas or its successor; and the Florida Reliability Coordinating Council, or its successor.

Sector 11 — Regional Entity

This Sector includes an entity having enforcement authority pursuant to 18 C.F.R. § 39.8.

Sector 12 — Government representatives

This Sector includes any federal, state, or provincial government department or agency in North America having a regulatory and/or policy interest in wholesale electricity. A not-for-profit association that coordinates and helps represent the interests of members of the Sector may be a member of the Sector unless the majority of the other members of the Sector objects. Entities with regulatory oversight over NERC or any Regional Entity, including U.S., Canadian, and Mexican federal agencies and any provincial entity in Canada having statutory oversight over NERC or a Regional Entity with respect to the approval and/or enforcement of Reliability Standards, may be nonvoting members of the Member Representatives Committee.

Sector 13 — Associate

This Sector includes all members that do not qualify for one of the Sector membership categories set forth in subsections i. through xii. above. Associates shall have all rights and duties of members except for the right to nominate and elect Member Representatives Committee representatives. Associates shall be entitled to receive all

public notices issued by the Corporation and may participate in any public meetings of the Corporation or its committees. At the request of any other Sector, an associate may serve as a representative of such Sector on the Member Representatives Committee and other committees with Sector representation, serve as a proxy for a Sector representative, and may coordinate and deliver such Sector's policy input to the Board. Associates also may serve as at-large members or their proxy on committees that include at-large members.