

**NERC**

NORTH AMERICAN ELECTRIC  
RELIABILITY CORPORATION

# ALIGN

## Regional Entity Newsletter

April 2021

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## LET'S GET ALIGNED: KEY TAKEAWAYS

### **Release 1 Launch Update – MRO, NERC, and Texas RE Now Live!**

ERO Enterprise leadership is pleased to announce the Release 1 launch of the Align tool and the ERO Secure Evidence Locker (SEL) for MRO, NERC, and Texas RE as of March 31, 2021. Align and the ERO SEL are designed to process and track all compliance monitoring and enforcement activities with the goal of improving security and standardizing processes across the ERO Enterprise. WECC will launch Release 1 on May 10, and SERC, RF, and NPCC will launch on May 24. Ontario will also launch Release 1 with NPCC as the first Canadian province to use the tool.

“The Release 1 rollout of Align has been a resounding success. The initial submittal quality has been a testament to the regional trainers’ dedication, registered entity diligence, and having a tool built upon a foundation of years of CMEP experience,” said Ben Lewiski, senior risk assessment and mitigation engineer for MRO.

“Using Align for the first time, for a self-log submittal, was a good experience,” said Mandy Barta, lead regulatory compliance consultant for Evergy. “As with any new system, extended use ultimately creates needed familiarity, but the training that was provided by our Regional Entity was extremely important. There are also helpful training materials provided by NERC on their Training site. There were additional fields that popped up when certain selections were made for drop-down fields, which required a need to go back to the Business Units to obtain additional information. Both exploring the system prior to completing a submittal and having a template containing all initial and potential fields, would allow for being completely prepared with all necessary data. Overall, the system was fairly easy to navigate and use,” said Barta.

Release 1 includes self-reporting/self-logging, enforcement processing, and mitigation functionality in Align, as well as the use of the ERO SEL to collect registered entity-provided evidence as part of the ERO Enterprise’s CMEP activities. The Regions have received approximately 60 submissions in Align to date. Registered entities that fall under Coordinated Oversight are expected to go-live with their Lead Regional Entity. The project team is continuing to work closely with MRO and Texas RE to address any issues that might arise for regional and registered entity users during this initial launch. These lessons learned will assist with the future Release 1 preparations for the remaining Regions. In addition, the team is also focused on ensuring business and system readiness for the other Regions leading up to their respective go-live dates. Visit the [Align project site](#) for the public launch announcement and more details on Release 1.

### Release 1 Regional Training Resources

Release 1 training nears completion with all Regions holding training sessions to ensure Regional staff are well equipped for the changes associated with Align and the ERO SEL. There are variations in the training schedule for different Regions based on their respective training plans and go-live dates. Please reach out to your Regional training leads listed below with any training-related questions.

Resources		Resources	
Region	Regional Training Leads	Region	Regional Training Leads
MRO	<a href="#">Michael Spangenberg</a> <a href="#">Ryan McNamara</a>	NPCC	<a href="#">Daniel Kidney</a> <a href="#">Kimberly Griffith</a>
Texas RE	<a href="#">Machelle Castro</a> <a href="#">Rachel Coyne</a> <a href="#">Rochelle Brown</a>	RF	<a href="#">Bob Folt</a> <a href="#">Ron Ross</a>
WECC	<a href="#">Angie Shapiro</a> <a href="#">Mailee Cook</a>	SERC	<a href="#">Janice Carney</a> <a href="#">Rick Dodd</a> <a href="#">Shawna Speer</a>

**Figure 1.1: Regional Training Contacts**

“If you hit a roadblock, always go back to the Align training environment and all of the training materials NERC has posted. Also, if a long process document is a bit much to reference quickly, create ‘cheat sheets’ to help you perform a task more quickly or to find the information you need more readily. Align and the SEL are simple platforms to use, you just have to find and create processes that work best for you,” said Machelle Castro, Align Release 1 training lead and program coordinator, Enforcement for Texas RE.

All training materials can also be found on the [NERC Training Site](#), including recently added materials such as the SEL Roles Cheat Sheet and new SEL and ERO Portal videos.

## Release 2 Launch Update

As we prepare for the upcoming Release 2 launch on July 19, 2021, the project team and Regional subject matter experts (SMEs) are continuing User Acceptance Testing (UAT) and will shift their focus to training soon. Training materials are currently in development, and regional and registered entity training sessions will be announced and held closer to the launch date.

Release 2 functionality will include:

- Technical Feasibility Exceptions (TFEs)
- Periodic Data Submittals (PDSs)
- Self-Certifications
- Attestations
- ERO SEL to include evidence submission for the above activities

More information on the Release 2 regional training schedule will be shared in the coming months.

## Accessing Align: Act Now

An important part of the launch success is ensuring appropriate access to the system. An active ERO Portal Account is required to access Align. **Please follow the instructions below to verify an existing account or set up a new account.** For password resets, select the “Forgot Password/Username” to reset a password. For questions or problems concerning ERO Portal accounts, please submit a support ticket [here](#).

All registered entities’ primary compliance contacts (PCCs\_ should also have an ERO Portal Account, and all Regions should validate that the PCC list is updated in CORES. All PCCs with ERO Portal Accounts are set up as Align Registered Entity Submitters and the Entity Administrators responsible for approving access requests.

## To Set Up an ERO Portal Account:

1. Navigate to <https://eroportal.nerc.net>.
2. Select “Register” in the upper left-hand corner.
3. Complete the registration form and click “Submit.”

**To Verify an ERO Portal Account:**

1. Navigate to <https://eroportal.nerc.net>.
2. Select “Sign In” in the upper left-hand corner.
3. Enter your credentials to confirm access to ERO Portal.

**Quick Links for Reference**

Here is a list of links to commonly requested project materials for Align and the ERO SEL. Please reach out to your Change Agents for additional materials.

Quick Links
<a href="#">FAQs</a>
<a href="#">Release 1 MRO, NERC, and Texas RE Launch Announcement</a> (March 31,2021)
<a href="#">Align Governance Model</a> (Updated April 2021)
<a href="#">Registered Entity SEL Requirements</a> (Updated February 2021)
<a href="#">Project SME Site</a> (Secure Member Access Only)
<a href="#">NERC Training Site</a>
<a href="#">CEA Align User Guide</a>
<a href="#">CEA SEL User Guide</a>

**Want to Learn More? Key Contacts and Resources**

The next Align Q&A is scheduled for **Tuesday, May 25, 2021** and is open to everyone in the ERO Enterprise. Join this call to get answers to questions and hear the latest updates from the project team. Please submit questions in advance to [AskAlign@NERC.net](mailto:AskAlign@NERC.net) or reach out to your Regional Change Agent. The change agents meet on a monthly basis and have the latest project updates. They are another resource for asking questions or sharing comments and feedback on the project.

Align Change Agents	
Organization	Change Agents
MRO	<a href="#">Desiree Sawyer</a> , <a href="#">Marissa Falco</a>
NERC	<a href="#">Chris Boyd-Witherspoon</a> , <a href="#">Jamie Calderon</a> , <a href="#">Farzaneh Tafreshi</a> , <a href="#">Sara Minges</a>
NPCC	<a href="#">Jason Wang</a> , <a href="#">Kimberly Griffith</a>

RF	<a href="#">Ray Sefchik</a>
SERC	<a href="#">Andrew Williamson</a> , <a href="#">Janice Carney</a> , <a href="#">Melinda Montgomery</a> , <a href="#">Rick Dodd</a> , <a href="#">Todd Curl</a>
Texas RE	<a href="#">Rochelle Brown</a>
WECC	<a href="#">Ben Aldous</a> , <a href="#">Mailee Cook</a> , <a href="#">Michael Dalebout</a>

### ABOUT THE ALIGN NEWSLETTER

This newsletter compiles a list of important Align project updates with actionable deadlines, as well as upcoming events, recently posted resources, and other relevant news and information. Please email [AskAlign@nerc.net](mailto:AskAlign@nerc.net) with feedback on this newsletter. Current and future newsletters and additional project resources, including the regularly updated [Align FAQs](#), can be found on the [Align Project Site](#).