

NERC

NORTH AMERICAN ELECTRIC
RELIABILITY CORPORATION

System Operator Reference Guide

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RELIABILITY | RESILIENCE | SECURITY



**3353 Peachtree Road NE
Suite 600, North Tower
Atlanta, GA 30326
404-446-2560 | www.nerc.com**

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Summary

The *System Operator Certification Program (SOC) Manual*¹ provides the framework for the System Operator (SO) program. It is the credential holders responsibility to read and understand the SOC Manual.

The SOC Manual is located on the System Operator Certification & Credential Maintenance Program² page on NERC.com³ under One-Stop Shop⁴.

This *System Operator Reference Guide* is intended to supplement—not replace—the *System Operator Certification Program Manual*. While this guide provides important information and step-by-step instructions for using the System Operator Certification and Continuing Education Database (SOCCED), it does not cover all topics addressed in the official Certification Program Manual. Through this guide, you will find references to the SOC Manual for additional context and clarification. It is strongly recommended to consult the SOC Manual on those points to ensure a full understanding of the certification requirements, policies, and procedures.

This guide uses credential holder as the term for person's that holds a NERC credential.

If you have other topic suggestions or want to comment on this guide, submit a ticket via the Help Desk⁵.

¹ https://www.nerc.com/pa/Train/SysOpCert/System%20Operator%20Certification%20DL/SOC_Program_Manual.pdf

² <https://www.nerc.com/pa/Train/SysOpCert/Pages/default.aspx>

³ <https://www.nerc.com/Pages/default.aspx>

⁴ <https://www.nerc.com/pa/Train/SysOpCert/Pages/SOOneStopShop.aspx>

⁵ <https://soccedsupport.zendesk.com/hc/en-us/requests/new>

Introduction

System Operator Certification and Credential Maintenance Program

In support of NERC's mission, the SOC Program promotes reliability of the North American BPS by ensuring that employers have a workforce of credential holders that meet minimum qualifications. NERC monitors credential holders to ensure they maintain their required credentials to work in system control centers across North America. NERC's SOC exam tests specific knowledge of job skills and reliability standards. It also prepares operators to handle the BPS during normal and emergency operations. Maintain certification by completing NERC-approved Credential Maintenance Program courses and activities. These industry-accepted qualifications are set through internationally recognized processes and procedures for agencies that offer certifications.

Governance

The Personnel Certification Governance Committee (PCGC)⁶ is a NERC standing committee that provides oversight to the policies and processes used to implement and maintain the integrity and independence of the NERC SOC program. The PCGC provides reports to the NERC Board of Trustees and NERC President regarding the governance and administration of the SOC program.

The Credential Maintenance Working Group (CMWG)⁷ reports to the PCGC and is responsible for developing and maintaining the Credential Maintenance Program under the general guidelines set by the PCGC.

Process

The Exam Working Group (EWG)⁸ consists of subject matter experts from all regions of North America and is responsible for doing an extensive job analysis survey of certified operators across the industry, which provides the basis for the exams. A job analysis survey results in an exam content outline for each of the four exams. The exam content outline is the framework used to associate tasks to exam questions. NERC contracts with psychometric consultants who assist a working group of NERC Certified System Operators (NCSOs) in the development and maintenance of each exam.

The four exams are the:

- Balancing, Interchange, and Transmission
- Balancing, Interchange
- Reliability Coordinator
- Transmission Operator

After the initial certification is obtained, the credential is maintained by meeting the continuing education requirements every three (3) years.

⁶ <https://www.nerc.com/comm/PCGC/Pages/default.aspx>

⁷ <https://www.nerc.com/comm/PCGC/Pages/CMWG.aspx>

⁸ https://www.nerc.com/comm/PCGC/Documents/Exam_Working_Group_Scope_2020.pdf

Credential Maintenance Program

NERC's Credential Maintenance Program acknowledges high-quality learning activities within the electric utility industry by approving continuing education providers that meet NERC guidelines and standards. Information on how to become a NERC-recognized continuing education provider is contained in the links below.

Provider Site:

Initial and existing continuing education providers can access SOCCED⁹ to perform the following:

1. Create a new provider account.
2. Access your existing provider account.
3. Submit new individual learning activity (ILA) applications.
4. Review the status of existing courses.
5. Submit transcripts of delivered courses.

⁹ <https://nerc-socced.useclarus.com>

Chapter 1: SOCCED Account

Creating an Account in SOCCED

Candidates must establish an account in SOCCED¹⁰. During the process, the candidate will be prompted to create a username and password and provide other pertinent information.

Username: Determine by candidate
First Name: First name on driver's license or other form of legal ID
Middle Name: Optional (common first and last names should use a middle initial, at a minimum.)
Last Name: Last name on driver's license or other form of legal ID

Important: Pearson VUE (Exam Vendor) requires you to provide a photo ID that matches the name on the account (name that was sent from SOCCED to Pearson VUE). If the name on the SOCCED account does not match the form of legal ID, **you will not be able to take the exam.**

Acceptable forms of ID: (must include photograph)

- Driver's license
- State identification card
- Passport
- Military identification card

Duplicate SOCCED Accounts

Duplicate SOCCED accounts are **prohibited**. NERC completes routine audits on duplicate accounts. If found, NERC will move forward by closing the additional account(s), and the candidate will potentially lose information, and start over.

See System Operator Certification Program Manual, Chapter 1: Certification Examinations ¹¹

Updating User Profile

The candidates can make changes to their account, operator, and contact information by updating their user profile via SOCCED. See [Appendix A](#)

Forgot Username or Password

- Submit a Request¹² to the SOCCED helpdesk.
 - Include full name, email address, and phone number.

SOCCED Help Center

NERC Staff manages and responds to SOCCED and Candidate/Credential Holder program related inquiries typically within 24-48 business hours (excluding holidays and weekends).

- Help Desk 404-446-9759 (General Questions; M-F 8:30 a.m. – 5:00 p.m. Eastern)
- Submit a Request¹³ to the SOCCED helpdesk.
 - Include full name, email address, and phone number.

¹⁰ <https://nerc-socced.useclarus.com>

¹¹ https://www.nerc.com/pa/Train/SysOpCert/System%20Operator%20Certification%20DL/SOC_Program_Manual_v4.pdf

¹² <https://soccedsupport.zendesk.com/hc/en-us/requests/new>

¹³ <https://soccedsupport.zendesk.com/hc/en-us/requests/new>

Chapter 2: NERC Certification Exams

Applying for an Exam

United States or Canadian residency is not required to take the NERC certification exam. Therefore, interested people across all continents are eligible to take the exam. However, the exam is only available at an approved testing location within the United States or Canada in English only.

Note: Remote proctoring of the exams is unavailable.

For guidance on how to apply for an exam, see [Appendix B](#).

Pearson VUE (Exam Vendor)

Scheduling Exam Appointments

After a candidate has paid for an exam application, candidates will receive an email from SOCCED with confirmation of payment. SOCCED sends their exam eligibility to Pearson VUE. The link to schedule the exam is on the candidates **SOCCED dashboard under 'Apply NERC'**. This link is used to schedule, re-schedule, and cancel with Pearson VUE. Candidates can also call the Pearson VUE Contact Center at Toll free number: 1-888-736-0563 or Toll number: 1-425-464-8871.

After the candidate schedules their exam appointment, Pearson VUE sends a confirmation email with details of the appointment, including the exam series code, the date, time of the appointment and location of the test center.

The exam appointment information will also be shown on the candidates **SOCCED dashboard under Apply NERC**.

Note: Candidates will receive an initial payment confirmation email from SOCCED with details about Pearson VUE.

Changing Exam Type

The SOC Manual provides candidates the ability to change the examination type (See [Figure 1 – Change Exam Type](#)) that was previously registered for in SOCCED. Once the examination type is changed, their SOCCED account is updated. The exam type change will cancel the existing exam authorization and application and create a new exam application with a new eligibility window for the candidate to schedule the new exam with the third-party exam vendor, Pearson VUE.

Note: *Pearson VUE must receive notification no later than 48 hours prior to the scheduled exam appointment for making this change or for submitting any additional change. The candidate may not be able to keep the original exam date and location.*

SOCCED sends an updated exam profile to Pearson VUE. Pearson VUE will update the exam type once candidates submits exam type change through SOCCED.

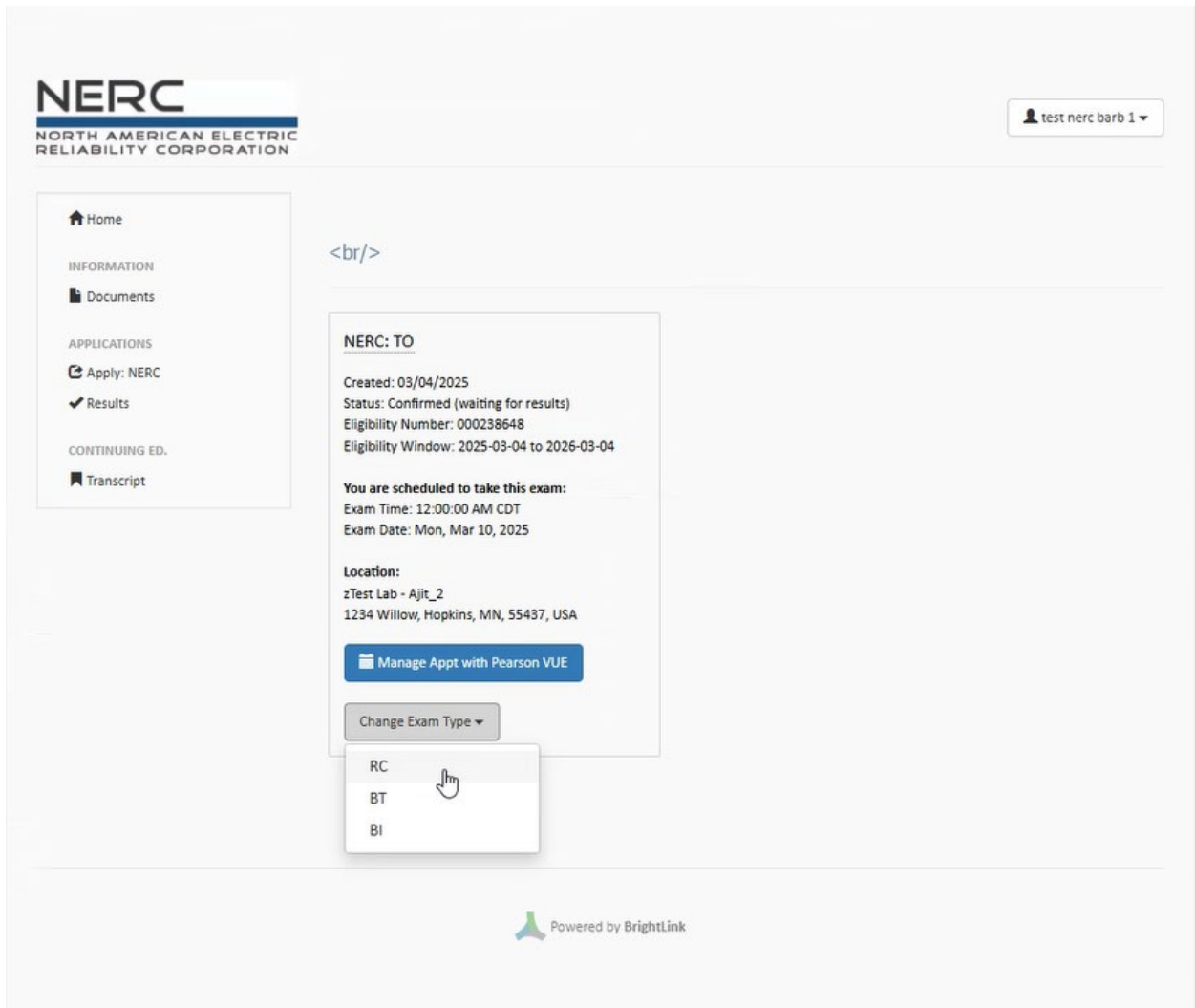


Figure 1: Change Exam Type

Examination Date

- Candidate must present two (2) valid forms of identification at the test center prior to taking an exam – one primary and one secondary identification from the list below.

Primary Identification – Currently valid, government-issued, has a photograph of candidate, is pre-printed with candidates name and signature

Examples:

- Driver's license
- Passport
- State identification card with photo
- Military identification card

Secondary Identification – Currently valid, pre-printed with your name and signature.

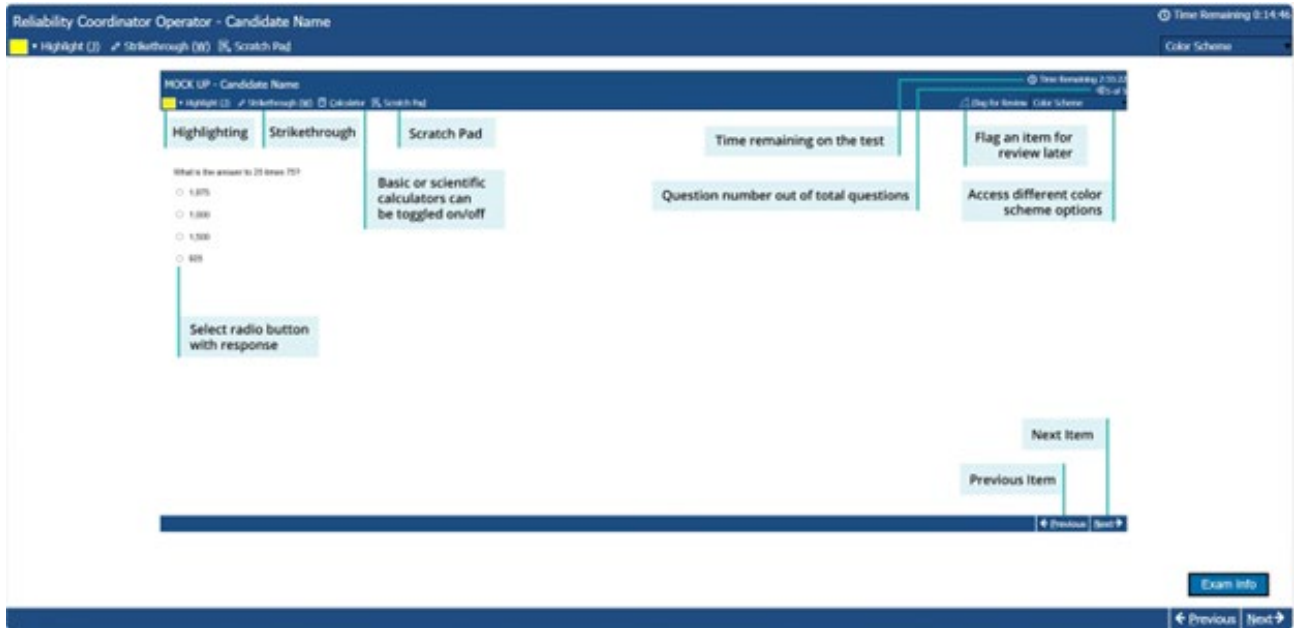
Examples:

- Credit card with signature
- ATM card with signature
- School identification card with recognizable photo
- Employer identification card with recognizable photo

Not Accepted ID: Social Security card, Temporary ID, Expired passport, or expired driver's license

Note: Expired IDs are acceptable if accompanied by renewal paperwork.

- No outside items can be brought into the exam room.
- Practice Questions help candidates familiarize themselves with the exam application features available during the exam. See screenshot below.



Post Exam and Results

Once a candidate has completed their exam, they should receive a hard copy of their exam results and score report. The grade of pass or fail will be posted to the candidate's account in SOCCED immediately following the candidate's exam. There will also be a copy of the score report from Pearson VUE. Candidates can also access their score report in Pearson VUE via the link in candidates SOCCED account that navigates to candidates Pearson VUE dashboard to view their score report.

Note: Only candidates that took their exam with Pearson VUE can view their score reports.

Time between Examinations: 42-Calendar Day Wait Period

See the SOC Manual¹⁴ for program information on this topic.

Failed Exams

If a candidate fails an exam, candidates:

- Are permitted to purchase an exam prior to the expiration of the 42-calendar day wait period.
- Will receive an email from SOCCED, whenever a payment is made in SOCCED.
- Are responsible for tracking the 42-calendar day wait period.
 - SOCCED does not send an email notification when the candidate is eligible to schedule the retake exam.
- Can schedule their next exam, starting at midnight of the 43rd day.

¹⁴ https://www.nerc.com/pa/Train/SysOpCert/System%20Operator%20Certification%20DL/SOC_Program_Manual_v4.pdf

Chapter 3: Credential Holder

Certificates

Candidates who pass their exams will receive a hard copy of the NCSO certificate and wallet card via the mailing address in their SOCCED account approximately six (6) weeks after the certificate effective date. The certificate is embossed and has the NERC CEO signature, certification number, effective date, expiration date, and is suitable for framing.

Credential Maintenance and Renewal

NERC issues a credential that is valid for three (3) years to candidates that have passed a NERC exam. To maintain a valid credential, the credential holder must earn the required Continuing Education Hours (CEHs) within the three (3) years preceding the expiration date.

Once the credential holder has obtained the required hours, the credential holder can renew their credential by paying the renewal fee through SOCCED. See [Appendix C](#).

Credential Renewal Payment Timing

When a credential holder renews their credential, they should consider the payment processing time. SOCCED does not allow a renewal to be completed until the payment has been successfully processed.

The [Table 2.1](#) below shows the amount of time needed for payment via credit card and check.

Payment Type	Processing Time
Credit Card	24–48 Hours (excluding weekends)
Check	7–10 Business Days

Paying by credit card

Payment Timing Example: If your certification renewal date is October 13, credential holder must submit credit card payment before October 11 to renew your certification prior to October 12 at 11:59.

Paying by check

Payment Timing Example: If your certification renewal date is October 13, credential holder must send a check payment by October 3 so that you can renew your certification prior to October 12 at 11:59.

Credential Holders that pay by check must include their full name and order number on the check. Send check payments to the following lockbox address:

NERC
PO Box 531652
Atlanta, GA 30353-1652

Credential Status Change

If the required CEHs are not met prior to their credential expiration date, the status of the credential will change to suspended. The suspension will last for one year. Credential Holders can accumulate hours while in the suspended status to have their credential reinstated with the original expiration date.

If the hours are not obtained by end of the expiration date, the credential status will change to expired. The credential will be revoked, and will have to take and pass an exam to become recertified.

Email Reminders

Credential Holders will receive three automated-email reminders to renew their credentials. The emails are triggered by the credential’s expiration date and sent on the following days:

- 90 days prior to expiration date
- 60 days prior to the expiration date
- 30 days prior to the expiration date

The email includes the expiration date and credential renewal related information.

Note: The email reminders are only sent to credential holders while the credential is active (*to avoid a suspended credential*). If a credential goes into suspension, the Credential Holder will be responsible for renewing their credential before the credential expires. Auto emails reminders will not be sent while the credential is suspended.

Timing of Renewals

The timing of a credential renewal is imperative for the credential holder to avoid suspension or expired certificates. Credential holders should accumulate the required hours and perform a renewal by 11:59 p.m. Eastern, on the day of their expiration date to avoid a status change. **Note:** Payments processed on or after the expiration date will cause the credential to be suspended or expired.

Example

A credential holder who has an active credential from August 2, 2017, to August 2, 2020, will need to accumulate the required number of hours prior to their expiration date of August 2, 2020, to renew. If required hours are not met by 11:59 p.m., Eastern of August 1, 2020, the status of the credential will change to suspended by 12:00 a.m. August 2, 2020.

If the credential holder is in suspension status, the credential holder has until 11:59 p.m. Eastern of August 2, 2021, to accumulate the required number of hours to renew. If the hours are not met, the status of the credential will change to expired by 12:00 a.m. August 3, 2021. Once the credential becomes expired the credential holder will be required to re-take the exam to become certified.

Time Zone

SOCCEd operates in the Eastern Time Zone. Credential Holders should note the time zone to prevent a timing issue when completing their credential renewal. As shown in [Table 2.2](#) below. If credential holder is in the Pacific Time Zone, the renewal will be required to be completed by 9:00 p.m. Pacific prior to the expiration date.

Time Zone	Time
Eastern Time Zone	12:00 a.m.
Central Time Zone	11: 00 p.m.
Mountain Time Zone	10: 00 p.m.
Pacific Time Zone	9: 00 p.m.

Reviewing Credential Holder’s Transcript

As noted in the SOC Manual, each credential holder is responsible for reviewing and ensuring the accuracy of their transcript in SOCCEd. See [Appendix D](#)

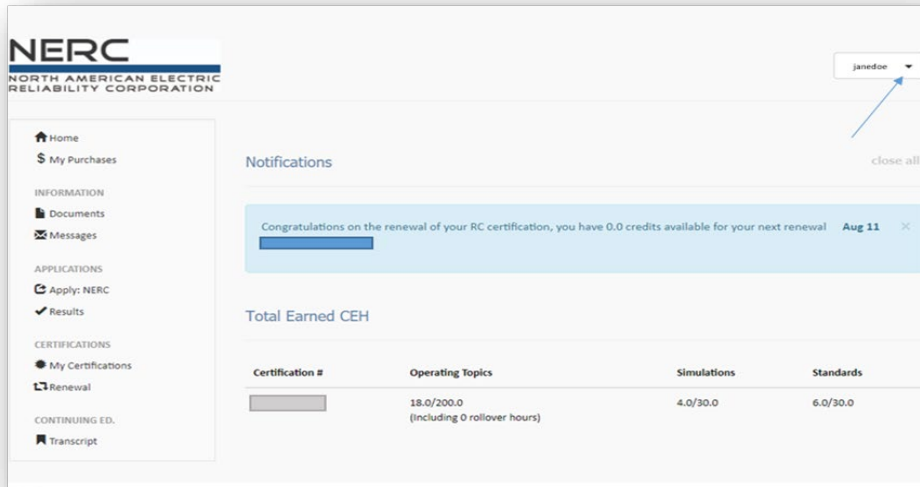
Provider Access to Review and Update Credential Holder's Transcript

See the SOC Program Manual for information on credential holder's responsibility concerning credential maintenance.

The credential holder is responsible for giving their credential maintenance providers access by updating their SOCCED profile account. When a credential holder leaves their company, they should update their SOCCED profile by removing the credential provider name. See [Appendix E](#)

Appendix A: Updating User Profile

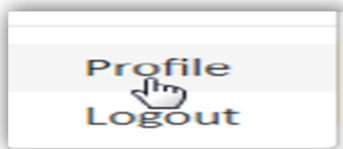
1. Login in to SOCCED



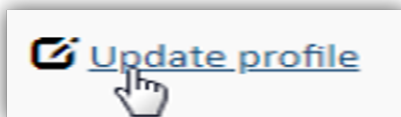
2. Select Dropdown arrow.



3. Select Profile



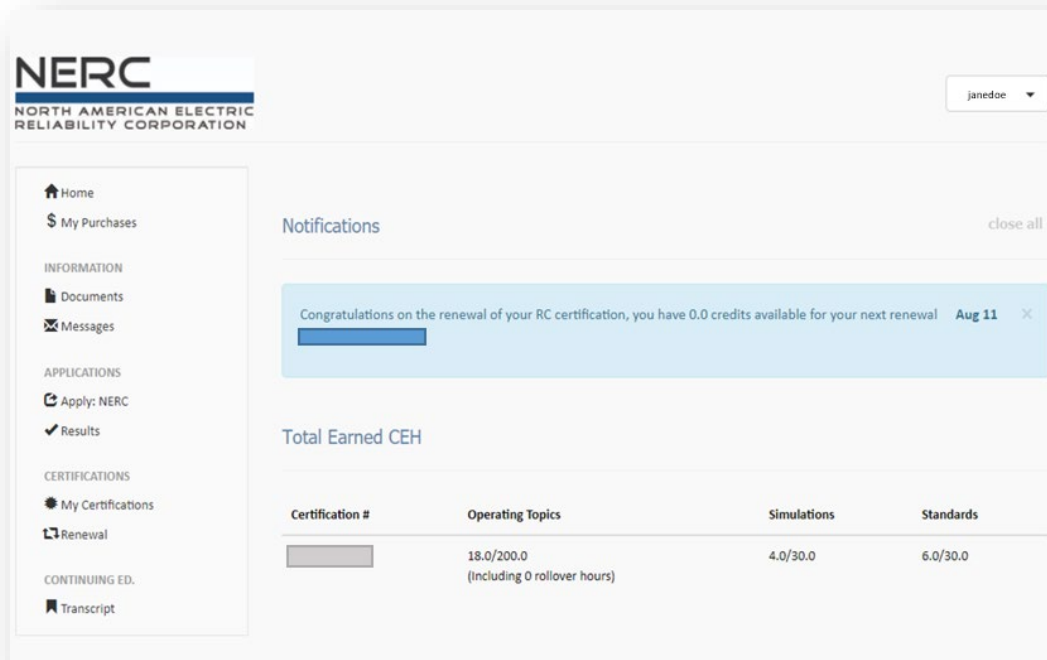
4. Select Update Profile



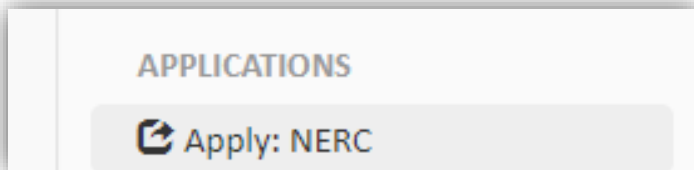
- a. Make necessary changes.
- b. Select Save Changes

Appendix B: Applying for an Exam

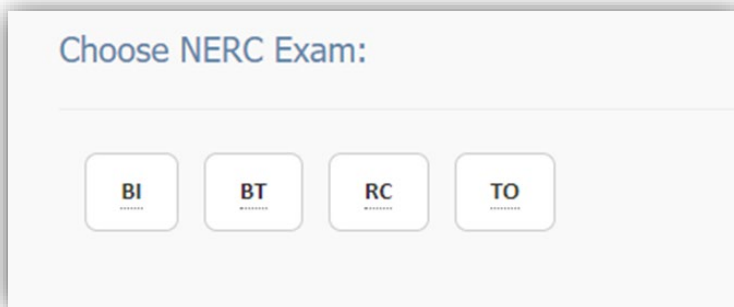
1. Login to SOCCED Account



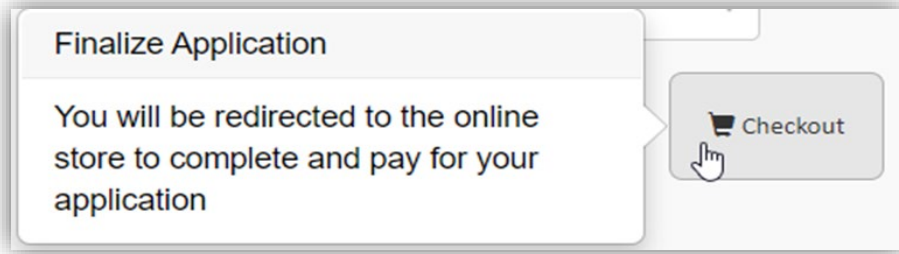
2. Select Apply: NERC



3. Choose NERC Exam:



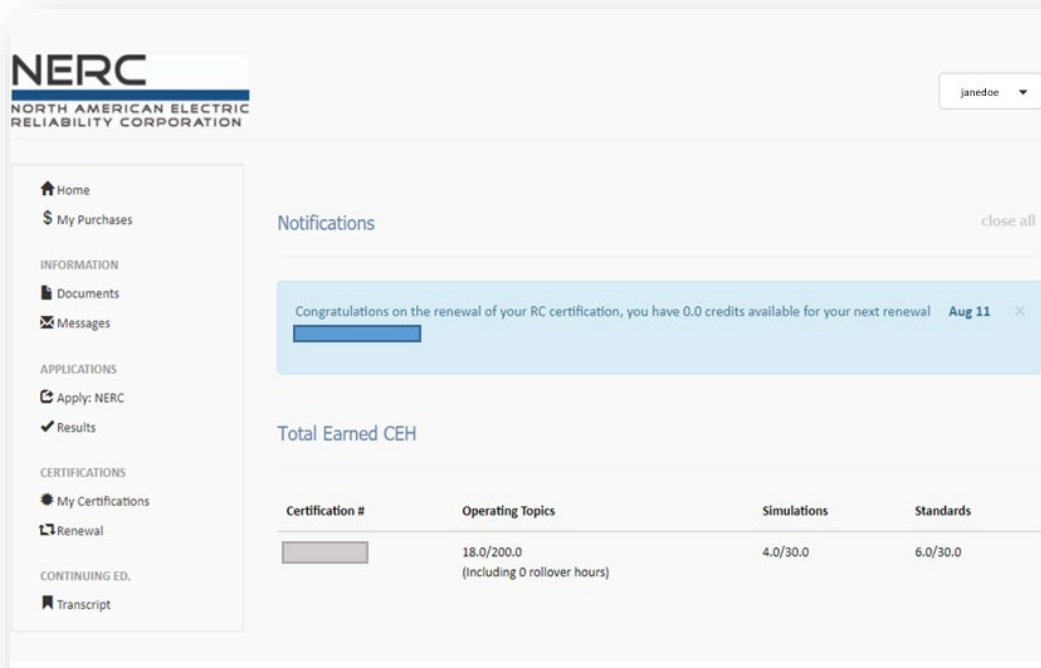
4. Select Checkout for Credit Card Payment



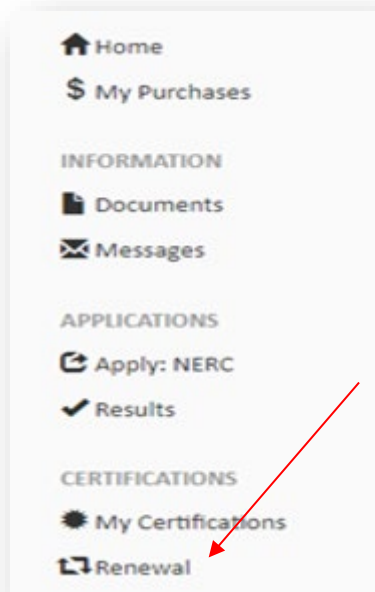
5. Select Send a Check for Check Payment

Appendix C: Renewing Credential

1. Login to SOCCED Account



2. Select Renewal



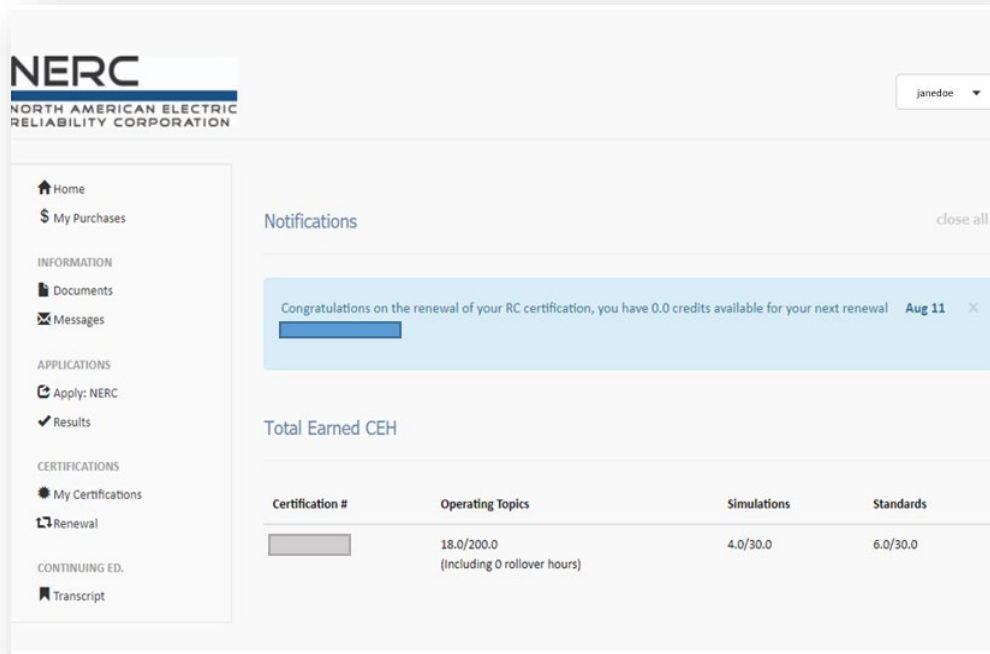
3. Please ensure the **box is checked** to allow the **Finish & Pay** Icon to turn **blue** to submit payment.
 - a. **Note:** If the box is not checked, the Finish & Pay will remain gray, and cannot be processed.

The screenshot displays the 'Renewal Progress' interface. At the top left, it shows 'RC Expires: 10/06/2020' with a small square checkbox next to it, which is currently unchecked. A red arrow points to this checkbox. To the right, three requirement categories are listed: 'Operating Topics' (200), 'Simulations' (30), and 'Standards' (30), each with a green progress bar and the text 'Requirement fulfilled'. Below this is a 'Fee Summary' section with a table. The table has two columns: 'Description' and 'Fee'. The 'Total' row shows a fee of '\$0.00'. A red arrow points to the '\$0.00' value. To the right of the table is a 'Finish & Pay' button, which is currently gray. At the bottom left, there is an orange button labeled 'Change Certification Level or Type'.

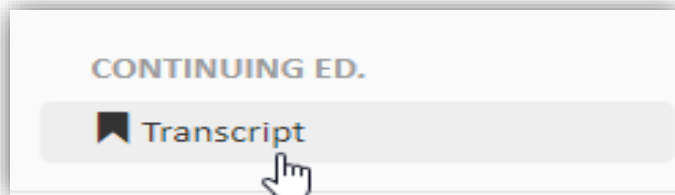
Description	Fee
Total	\$0.00

Appendix D: Reviewing Credential Holder's Transcript

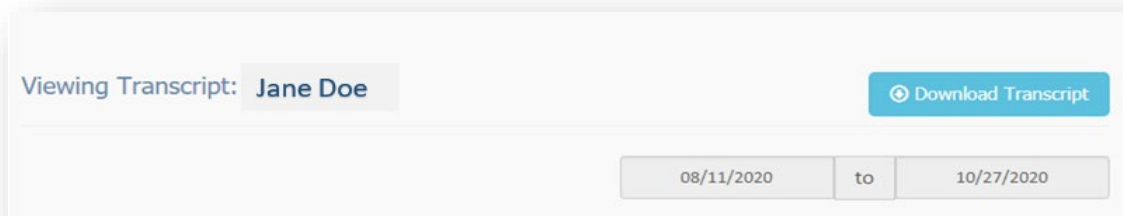
1. Login to your SOCCED account.

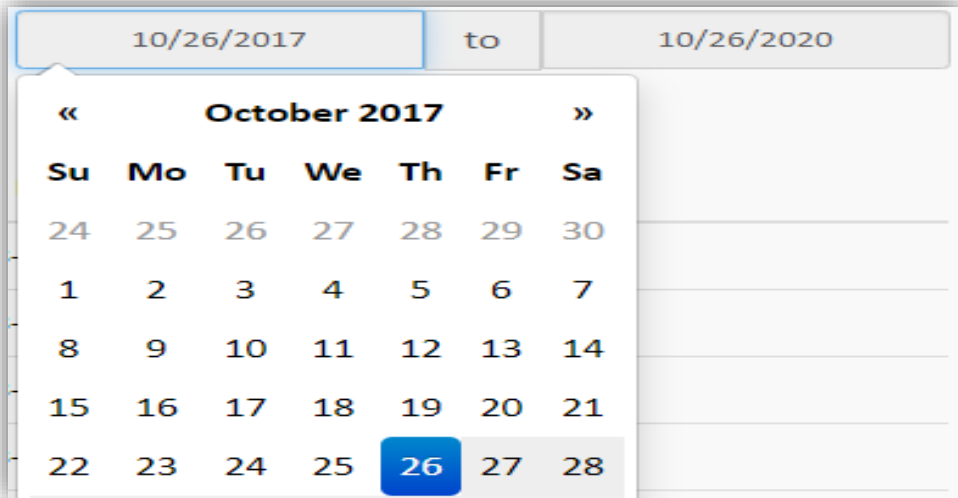


2. Select "Transcript" on the left under Continuing ED.

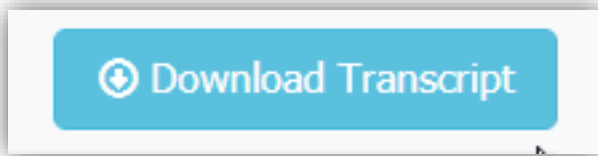


3. Select Date Range:





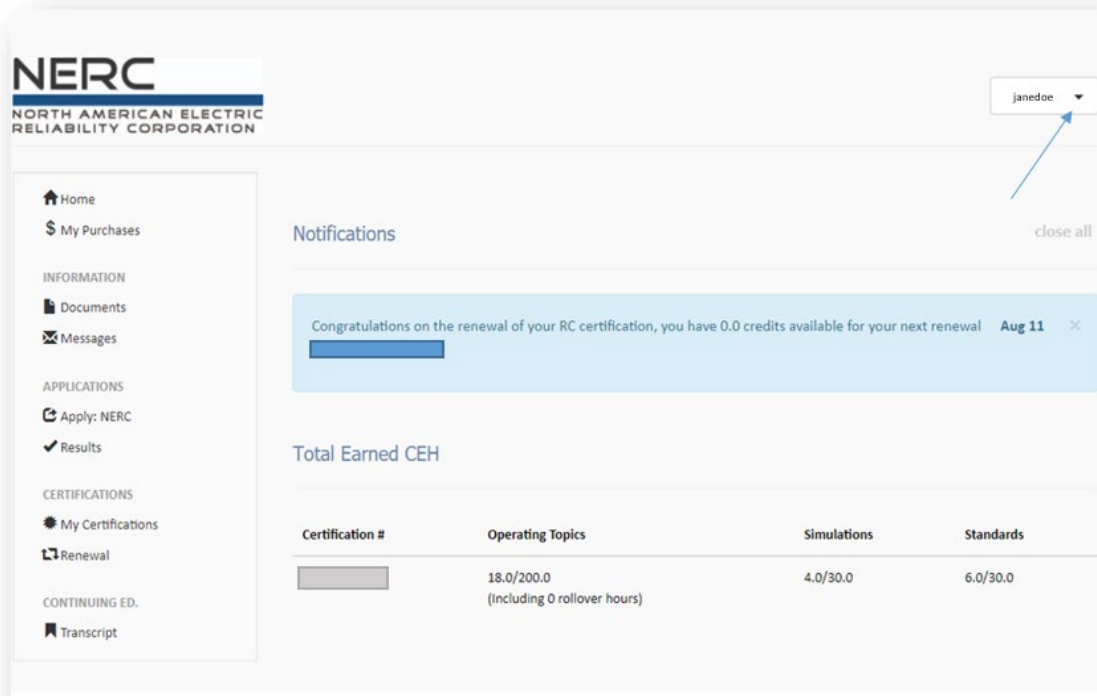
4. Select Download Transcript



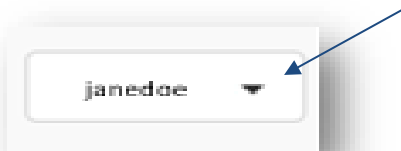
5. The transcript will appear in the form of an excel spreadsheet as a csv file.

Appendix E: Provider Access to View Credential Holder's Transcript

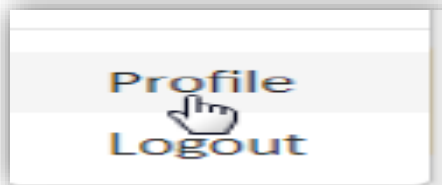
1. Login to SOCCED account.



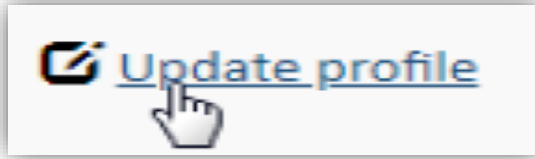
2. Select the dropdown arrow:



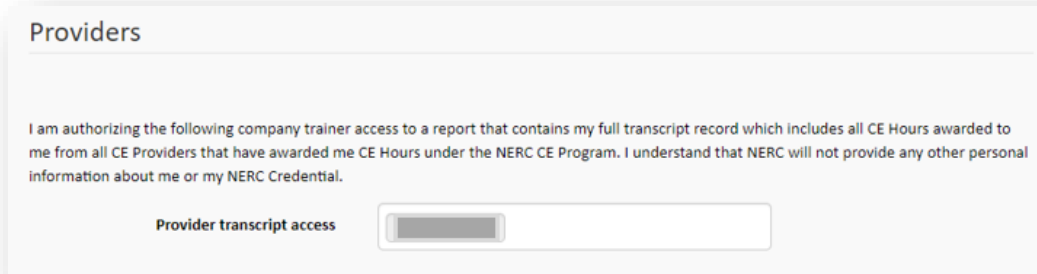
3. Select Profile



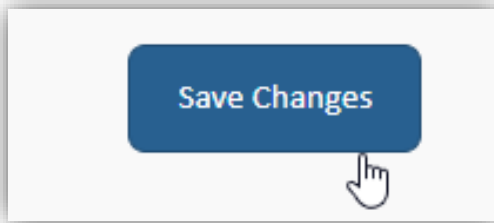
4. Select Update profile



5. Scroll to the bottom of the page until you see the "Providers" section.
6. Begin to type the name of the Provider within the Provider transcript access Box
 - a. Select the name to be added



7. Select Save Changes to submit.



Appendix F: Revision History

Table F.1: SOC Reference Guide Revision History

Revision No.	Date	Chapter	Description	Version
0	11/18/2020	All	The <i>System Operator Certification Reference Guide</i> was approved by the Personnel Certification Manager	1.0
1	02/16/2021	2	Added check payment address.	1.1
2	3/29/2021	All	Moved SOCCED related items from under to SOCCED	1.2
3	6/7/2022	3	Added the exam calculator description.	1.3
4	2/17/2023	2	Added pre-test/practice questions are English only.	1.4
5	9/29/2023	2 & 3	<ul style="list-style-type: none"> • Changed Help Desk to SOCCED Help Center • Changed Chapter 2's title from Exams and Credential Renewals to NERC Exams • Updated info under chapter 2 regarding Test Taker Portal and basic exam on-screen calculator description • Updated Test Taker Scheduling Link • Added Exam Schedule, Post Exam/Results, and Failed Exam subheadings with new information. • Changed Chapter 3 title from Exam Vendor to Credential Holder 	1.5
6	5/1/2025	All	<ul style="list-style-type: none"> • Added further explanation to the purpose of the <i>System Operator Reference Guide</i> • Changed SO to Credential Holder • Changed candidate to credential holder where applicable • Changed "you" to candidate in all locations • Updates from exam delivery vendor change from PSI to Pearson VUE 	1.6