

# System Operator User Guide

# System Operator Certification and Continuing Education Database (SOCCED)

Rev. 08/2009



# **Table of Contents**

Contact Information	3
Introduction	4
Overview	5
Accessing the System	6
Open an Account	7
Login	
Personal Accounts	
Change My Personal Information	
Get My Certificate Number	14
Reprint My Certificate	
Apply for an Exam	17
Check My Transcripts	20
Authorize Access to Transcript	25
Revoke Authorization to Transcript	27
Printing Your Transcripts	28
Renew My Certificate	29
Find Learning Activities	30



## **Contact Information**

Please contact either Rhonda Tuck at <a href="mailto:rhonda.tuck@nerc.net">rhonda.tuck@nerc.net</a> or John Theotonio at <a href="mailto:john.theotonio@nerc.net">john.theotonio@nerc.net</a> if you have any problems with your account, navigation, or adding records within the SOCCED.

During business hours you can also reach us at 609-452-8060.



## Introduction

The NERC SOCCED is a database used by both Certified System Operators and Providers of learning activities. The main purpose of this database is to provide a quick an easy method for system operators to become certified and to maintain their certification through CE Hours. Candidates request an Authorization To Test (ATT) number through this database. Candidates then use the ATT number to schedule an appointment with Prometric to sit for the examination. When Prometric notifies NERC that a candidate has passed an examination, the database issues a certificate number based on the examination and the date. NERC then issues a certificate that is valid for three years. The system operator must maintain that certificate by earning CE Hours and cannot re-certify through examination.

The system operator must earn a minimum number of CE Hours in specific categories within the three-year window to maintain the certificate. This is explained in detail in the System Operator Certification Program Manual. The system operator earns CE hours by participating in NERC-approved learning activities. These learning activities are offered by both in-house and commercial providers. The provider of the learning activity uploads the CE Hours earned by the certified system operators into their personal accounts. The database tracks these CE Hours and, as minimum criteria are met, allows the certified system operator to maintain their credential.

This document is written in a plain language style for ease of reading. We use the following references:

- 'We' or 'us' means the NERC (North America Electric Reliability Corporation).
- 'You' means the system operator.
- 'Provider' means an entity registered with NERC to provide continuing education training.
- 'The database' means the NERC SOCCED (System Operator Certification and Continuing Education Database).
- 'CE' refers to NERC continuing education.



### Overview

This guide will help you create and manage your personal certification account, both before and after you become a NERC Certified System Operator. We do not advise you to give others access to your account because of the personal information contained in it. Also, we will not give access to your account to anyone other than you. If you give access to your account to others, you do so at your own risk.

You can use the database to:

- □ Register and open an account (for first time users)
- □ Verify your account information
- □ Apply and pay to take a NERC Certification Exam
- □ Apply and pay to take a PJM¹ Certification Exam
- □ Review and verify your CE Hour transcripts
- □ Renew your certificate
- □ Reprint your certificate
- □ View available CE courses listed by provider<sup>2</sup>

You are responsible for retaining appropriate hard-copy documentation for proof that you have earned CE Hours if there is a discrepancy in your transcripts. This documentation includes:

- Name and contact information of the Provider.
- Title and identification number of the learning activity and description of its content.
- Date(s) of the learning activity.
- Location (if applicable).
- Number and type of CE hours.
- Your NERC certificate number.

<sup>&</sup>lt;sup>1</sup> Reference to PJM certification exams pertains only to those system operators who operate within the PJM system and are subject to PJM guidelines.

<sup>&</sup>lt;sup>2</sup> Not all CE providers will be listed, only those who have courses that are open to the public will be listed.



## Accessing the System

Anyone with internet access and a valid user ID and password can access the system. The SOCCED home page is located at <a href="https://socced.nerc.mcgware.com/Login.aspx">https://socced.nerc.mcgware.com/Login.aspx</a>

Pop-ups must be ALLOWED for these pages to work. The **Operator Registration** or **Provider Registration** buttons are used only to register new operator and new provider accounts.

New users can create accounts and returning users can access their accounts from this



All pop up windows can be expanded by clicking on and dragging the lower left corner of the window.



## Open an Account

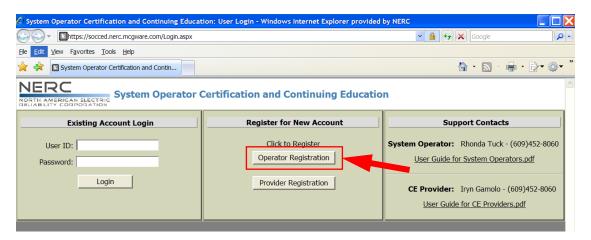
#### First time users can create a personal system operator account

Before you can become a NERC-certified system operator you must create a personal account so that you can request authorization to take a NERC certification examination.

#### Creating an account and logging in for the first time

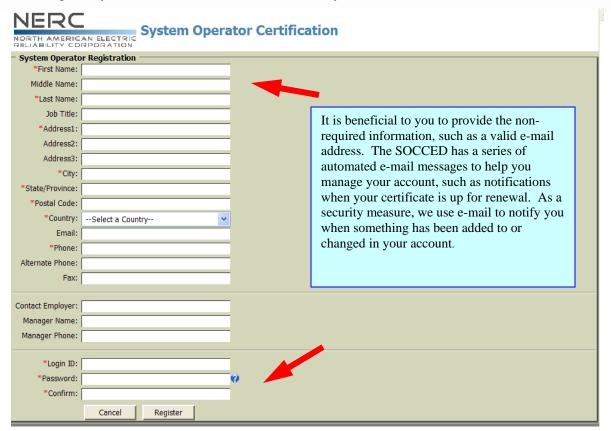
Pop-ups must be allowed otherwise this page will not work.

Click on the Operator Registration button, as shown. (Remember, do this only if you do not have an existing account.)





Complete all of the required data as marked by the red asterisks. If you desire e-mail notifications, you should provide us with a valid e-mail address, although it is not required. If you do not provide a valid e-mail address, we will not be able to notify you of changes to your account and information about your credential.



All pop-up windows can be expanded by clicking on and dragging the lower left corner of the window.



When you have all of your personal information completed, click on the Register button.





## Login

#### Login for returning users

Returning users login on the login page



Enter your login ID and password and select Login



When your registration information is accepted, this screen will appear. This is the Welcome screen for your personal account. If your name does not appear, please log out and try again.

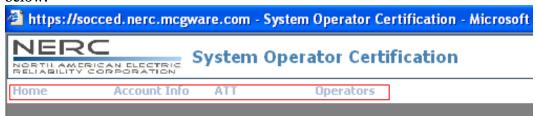
Your personal home page will appear every time you log in. You manage your personal account from this home page.





## **Personal Accounts**

There is a row of tabs across the top of your personal account home page, as shown below.



#### The first tab is the Home tab

This tab takes you back to your home page from anywhere in the database. The Home page shows your name and the time of your last login.

#### **LOGOUT**

When you are ready to log out, click LOGOUT in the upper right corner of any screen. When you log out your Web browser window will close. This is a security design feature to prevent others from backing into your account.

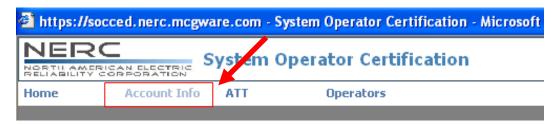




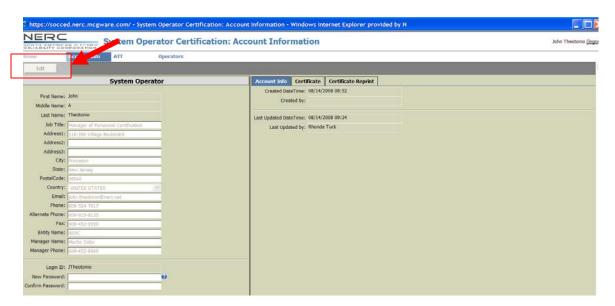
## Change My Personal Information

#### **Account Info Screen**

The **Account Info** screen is accessed by clicking on the **Account Info** tab.



The **Account Info** screen lists your personal information and your certificate information. You can check to see if everything is correct and you can update your personal information by clicking on the **Edit** button on the top left of the screen, as shown.

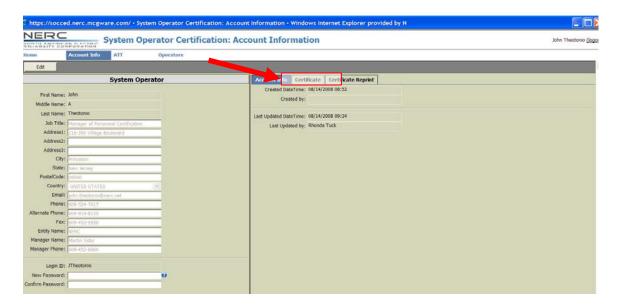




## Get My Certificate Number

#### To view your certificate information

Click on the Certificate button at the top of the right side. This will show your certificate number, the issuance date, and the expiration date. If the certificate has been revoked, that date will show also.



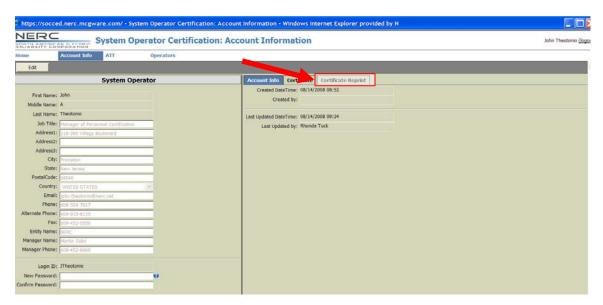
If you don't see all of the information in the pop-up window, the window can be expanded by dragging the lower left corner of the window.



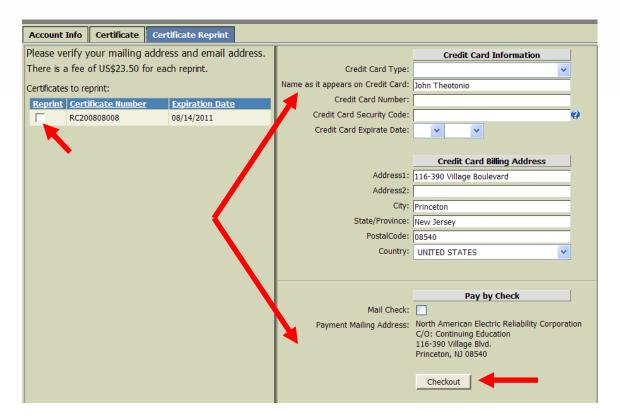
## Reprint My Certificate

#### To request a copy of your certificate

Click on the Certificate Reprint button at the top of the right side. This will take you to a screen where you can request NERC to send you a copy of your certificate. There is a nominal charge for reprinting a certificate.







To request a copy of your current certificate first check the box that is labeled Reprint to the left of your certificate number. Then fill in your method of payment on the right side of the screen. When you are finished selecting your method of payment click on the button labeled Checkout at the bottom right side. This will send a message to the NERC administrator requesting a copy of your current certificate or certificate selected (if you have more than one certificate) be printed and sent to the address you supplied in your account information.

If you have provided a valid e-mail address on your account, you will receive the e-mail confirmation and the receipt or invoice for payment.



## Apply for an Exam

#### **Request an Examination**

If you want to obtain an Authorization To Test, click on ATT to view the drop down box then click on Request Authorization To Test.

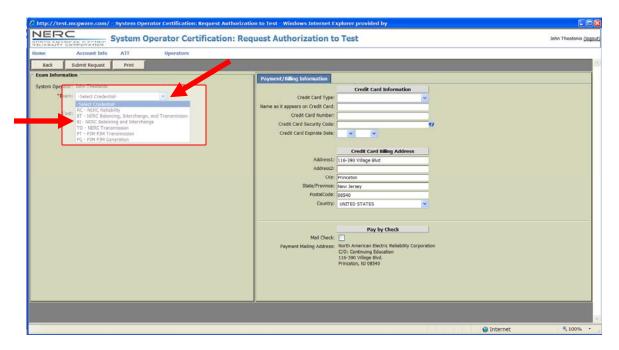


Clicking on the Request Authorization To Test will bring up the ATT screen.

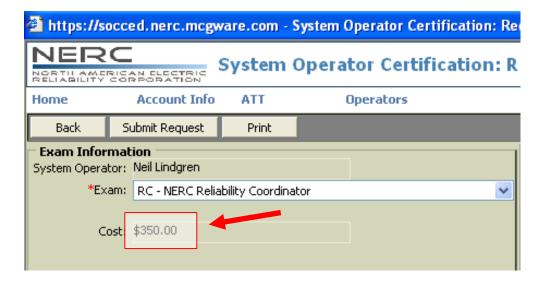


#### **Authorization To Test**

Use the **Request Authorization to Test** section to sign up and pay for exams. The available examinations are on the left side of this screen. Click on the down arrow next to the white box to view the exams you are authorized to take.



Click on an examination to view the cost. The cost will be displayed under the white box



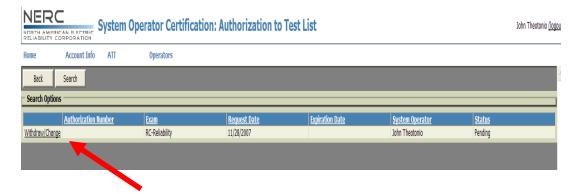


#### View examinations for which you have already been authorized

If you want to view examinations for which you have already been authorized, click on the ATT tab, and then click on Authorization to Test List.



The screen below lists all of the exams for which you have an Authorization To Test.



#### Withdraw or change examinations

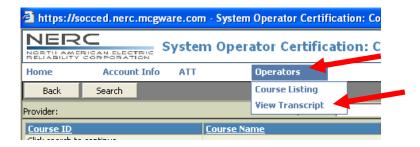
Click on Withdraw/Change next to the desired examination to withdraw from an examination for which you are already authorized, or to change your authorization from one examination to another. There is a fee to withdraw as explained in the Program Manual. There is no fee to change the examination, but the original eligibility dates will apply.



## **Check My Transcripts**

#### **Operators Tab**

Clicking on the **Operators** tab opens a dropdown menu. This menu provides an option to display your transcript records of achieved CE hours or a list of courses that the providers have requested to be listed.



#### **View Transcripts**

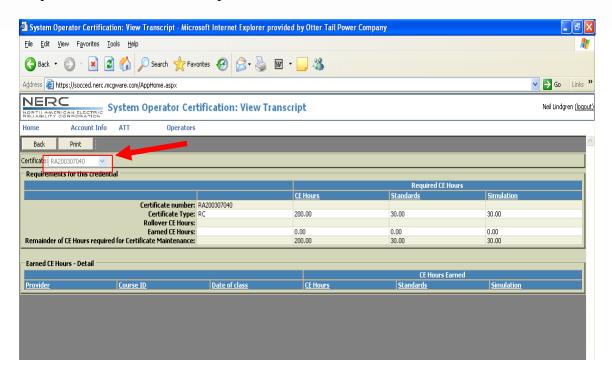
Clicking on **View Transcript** will bring up your record of courses taken to date. If a record or transcript is missing, please contact the provider of that learning activity. NERC cannot help you.



If you don't see all of the information in the pop-up window, click on your certificate number from the drop down selection on the left. Also, the window can be expanded by dragging the lower left corner of the window.

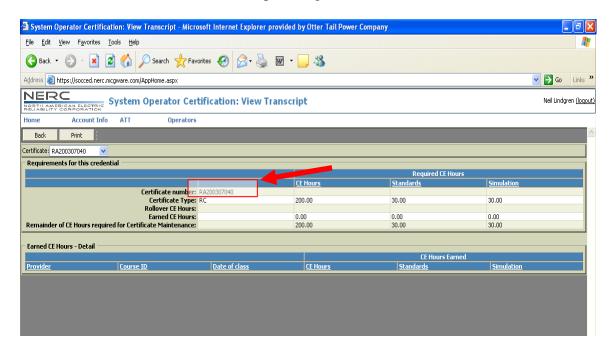


If you have more than one valid certificate number, you can display transcript records for a different NERC certificate by selecting any additional certificate numbers you might hold from the certificate drop down box shown at the top left.



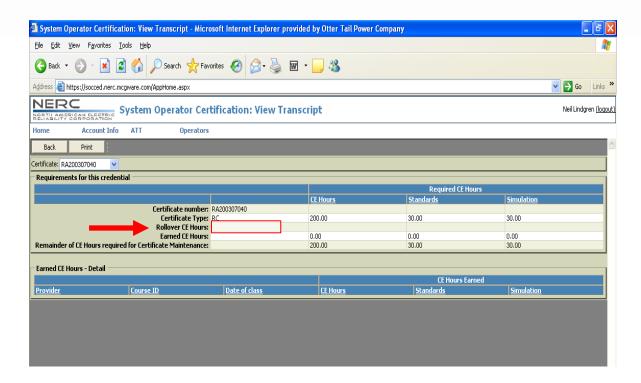
#### The following screens are an explanation of how to read the transcript screen.

The certificate number for the transcripts being shown is listed in the box here:

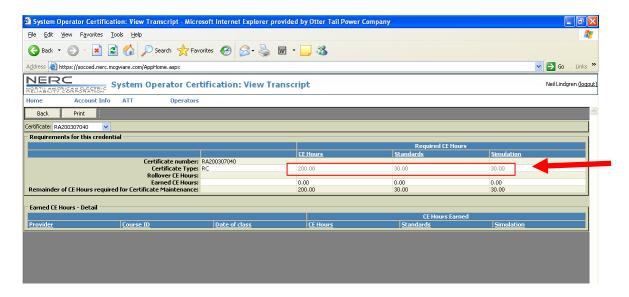




If you have maintained your credential at least once and you have CE Hours that are eligible for roll over, they will be shown here:

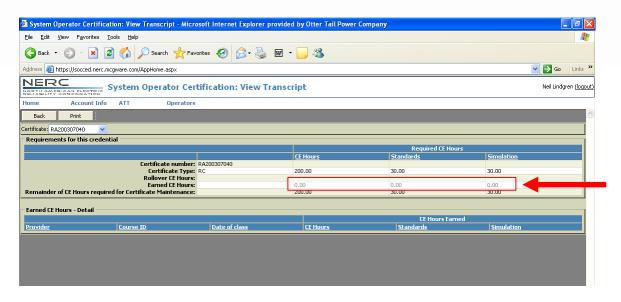


The number and category of CE Hours required for you to maintain this credential is shown here:



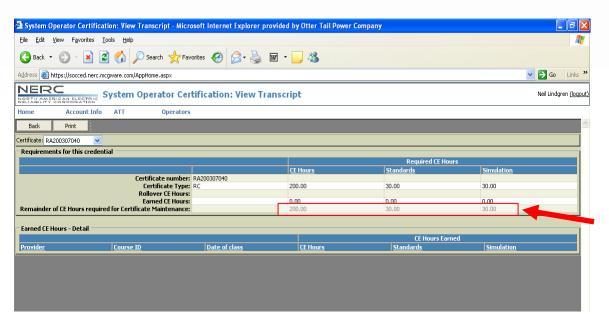


The number of CE Hours you have been awarded are shown here:





The remainder of CE Hours you must earn and their categories are shown here:



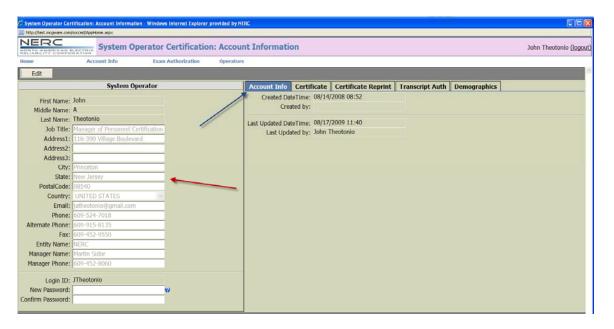


## **Authorize Access to Transcript**

#### **Granting Authorization to View Transcripts**

Go to <a href="https://socced.nerc.mcgware.com/Login.aspx">https://socced.nerc.mcgware.com/Login.aspx</a> and log into your system operator account. If you are certified you do have an account so do not attempt to register for a new account. Doing so will only create a duplicate account for you without any of your certificate information or transcripts. If you are unsure about your log in ID please call the NERC Administrator at 609-524-7014.

Please take a moment and check your contact information under the Account Info menu.



Click on the Transcript Auth button to access the screen where you will grant permission to your trainer to have access to the transcript report.

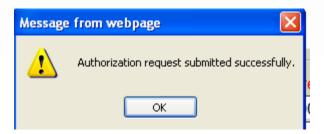
The red arrow points to the area where you will grant authorization for a trainer to view your transcripts. To set up the authorization follow these steps:

Click on the checkbox (green checkmark) that states "I am authorizing the following company trainer access to a report that contains my full transcript record".

- Fill in the CE Provider ID for your company
- Fill in the name of the trainer (this is who NERC may contact to verify your request)
- Fill in the e-mail address of the trainer from the above line
- Fill in the trainer's phone number

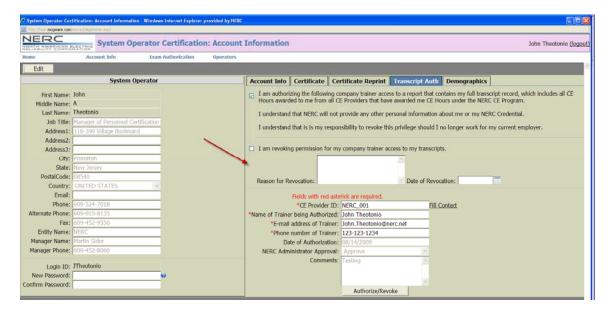
The date may be left blank as SOCCED will add the current date when you finish. Click on the Authorize/Revoke button at the bottom of the screen





You will see a message appear once your request has been submitted. Please wait until you see the above message.

Once you submit your request you will receive an e-mail message from SOCCED automatically to confirm your request.



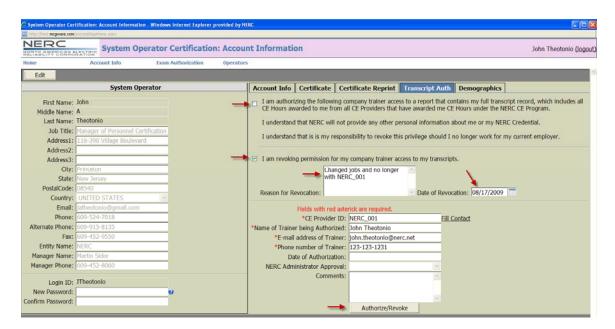


## Revoke Authorization to Transcript

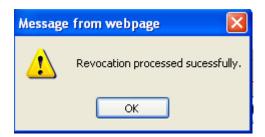
#### **Revoking Authorization**

Uncheck the authorization checkbox

Check the "I am revoking permission for my company trainer access to my transcripts." Checkbox Add a description for why you are revoking permission in the Reason for Revocation text box Add a date into the Date of Revocation date field (you can use the calendar function) Click on the Authorize/Revoke button



Wait for the message to come back saying your Revocation was processed successfully. The revocation will occur on the date you entered. If the date was the current date, then revocation was immediate. You will receive an e-mail confirmation from SOCCED.



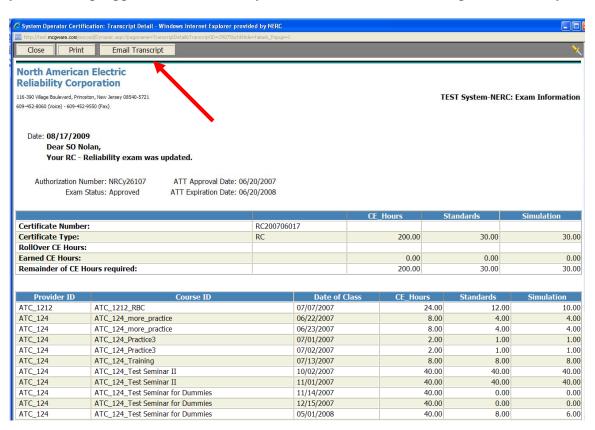


## **Printing Your Transcripts**

#### **How to Print Your Transcript**

#### **Operators Tab**

Clicking on the **Operators** tab opens a dropdown menu. Click on the certificate number you wish to print or e-mail. You can now print or e-mail your transcript to yourself or anyone that you chose. Once your transcript appears in the window you will now see the buttons to print or e-mail your transcript.

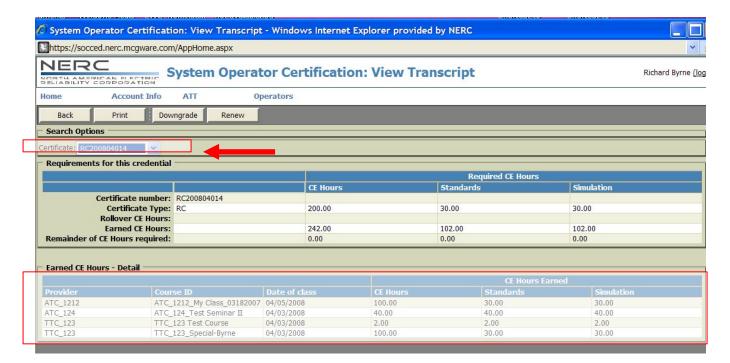




## Renew My Certificate

#### **How to Maintain Your Credential**

When you have earned at least the minimum number of CE Hours required to maintain a credential, two boxes will appear. If you have the required number of CE Hours and the Downgrade box or the Renew box is not showing, click on the down arrow next to the Certificate box and select the certificate number.



Your list of transcripts is in the field in the lower half of the page.

When either the Downgrade button or the Renew button is clicked, a message is sent to the System Operator Certification Coordinator indicating your request. You will be notified when the Coordinator has verified your CE Hours and acted upon your request.

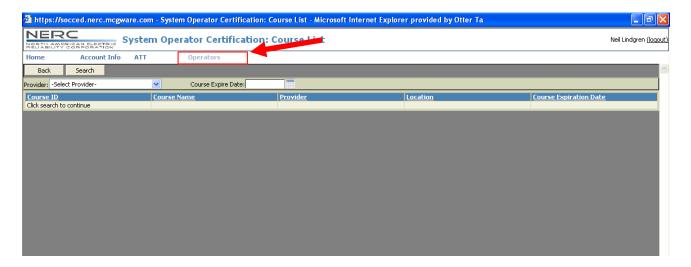
If you don't see all of the information in the pop up window, the window can be expanded by dragging the lower left corner of the window.



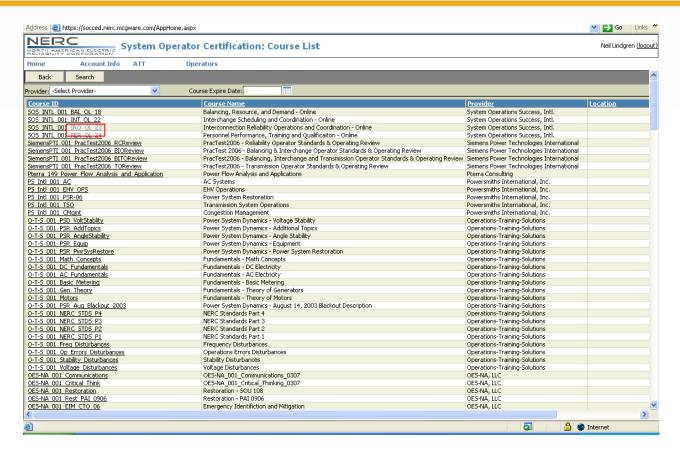
## Find Learning Activities

#### How to select a course for viewing

Click on the Operator tab to open the drop down box, select **Course Listing** from the drop down box to view courses that are available to you from the providers. Click on the **Search** button to populate your list.







You can organize courses in alphabetical order, either ascending or descending, by clicking on the column headers **Course ID** or **Course Name**. You can also narrow down the list by selecting a provider and a course expiration date (near the top of the page) and clicking the **Search** button.