



Enhancements will be made to the SERC Portal effective **March 31st**. Below is a summary of the changes:

- The menu structure under Compliance, where compliance forms reside, will be segmented into the three-letter acronym denoting the general topical area of the Standard, i.e. BAL, PER, TOP.
- The Compliance-based roles assigned to an individual contact will change to a function-based role. Examples of new roles are: Compliance RC Contributor, Compliance RC Viewer, Compliance BA Contributor and Compliance BA Viewer.
- Two all-encompassing roles, Compliance Contributor and Compliance Viewer, were created to provide a contact the same permissions as assigning each individual Contributor or Viewer role for that Master Account. The attached spreadsheet provides the mapping that has been automatically implemented for each contact as the transition to the new roles takes place.
- The Telephone and Title fields for contacts are now REQUIRED. Each contact can update these fields by choosing System Administration -> My Contact Info and entering the proper data.
- For each Master Account in the Portal, the MAA shall designate one person for each role as the Primary Compliance Contact, Secondary Compliance Contact, CEO Contact and CEO Designee Contact. This can be done by opening the contact information for each person and assigning one of the roles listed above.

Five (5) WebEx sessions have been set up. They will be limited to Master Account Administrators only and will address the changes above. To attend, you must sign up for one of the five sessions by going to the SERC public site (www.serc1.org) and register under Upcoming Meetings. After registration is closed, an email will follow with the WebEx and dial-in information. The dates and times for each 2-hour session are listed below:

Thursday, April 3 rd	10:00 AM to Noon (EDT)
Friday, April 4 th	10:00 AM to Noon (EDT)
Tuesday, April 8 th	10:00 AM to Noon (EDT)
Tuesday, April 8 th	2:00 PM to 4:00 PM (EDT)
Wednesday, April 9 th	10:00 AM to Noon (EDT)

More WebEx sessions will be scheduled during the weeks of April 21st and 28th for Master Account Administrators, Compliance Contributors and Authorized Signatories.

Please take this time to clean up Contacts that have access to your master account(s) within the SERC Portal. You should assess the permissions (roles) given to each individual and delete contacts that should no longer have access to the portal.

Please direct any questions regarding the above to Catherine Sills at csills@serc1.org or 704-940-8218.