

# Customer Requirement Playback

EMR Portal – 8th June 2023

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## Slido Access

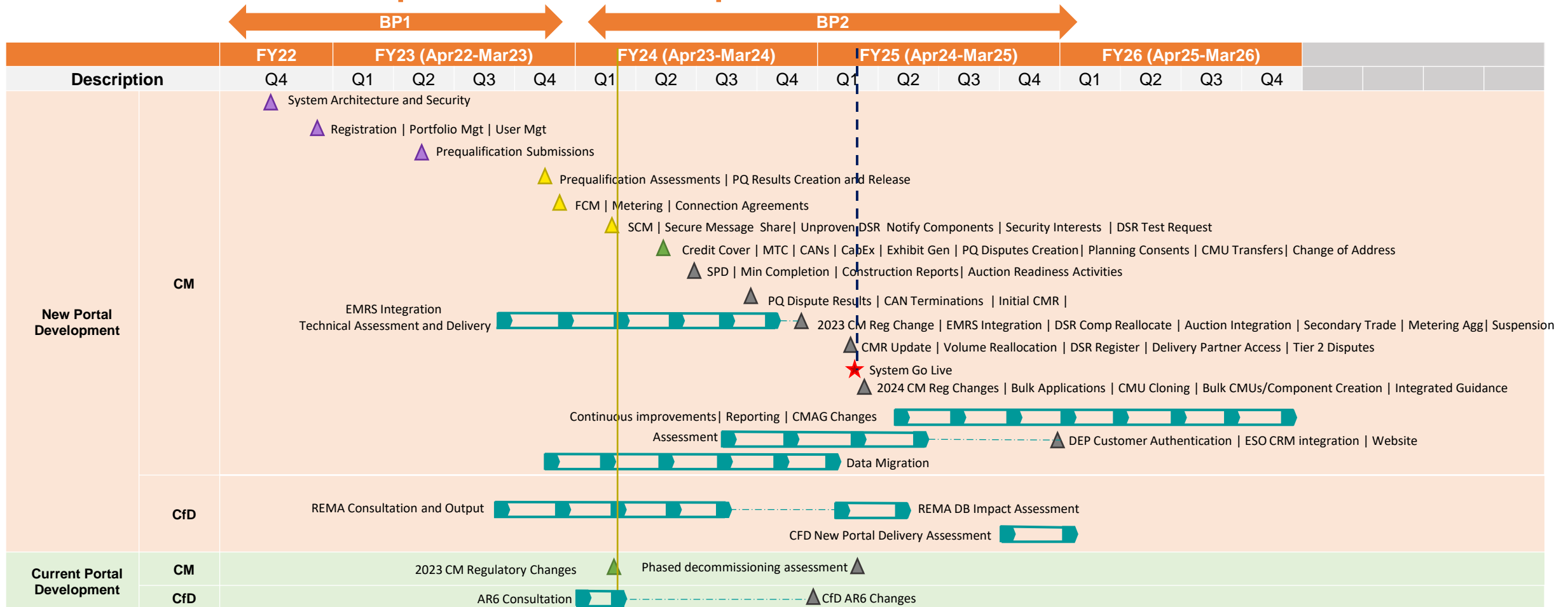
We will be using Slido for questions and feedback in today's session. Please go to sli.do and enter the event code **#141 7572**.

If you would like to ask any questions ahead of the session please either send them in by email or use [this link](#) to ask them on Slido, the event code will only work on 08/06/2023



# EMR DB Portal Roadmap – 2024 Go-Live Implementation

Sli.do #141 7572



- The roadmap represents a summarised view of the expected features being delivered in the New Portal, with the expected development completion timeline.
- Functional features are grouped in to development increments, which are defined, built, tested and then deployed in to our production environment in logical groups in preparation for the full system go-live in Q1 of Financial Year 24/25.
- Post “Go-Live”, there will be a continuous improvement schedule to implement prioritised changes.

Legend: ▲ Deployed ▲ Available in Customer Sandbox ▲ In Development ▲ Planned [Delivery Train Icon] Delivery Train

Date raised	Feature Area	Customer Comment	DB Response
15/12/2022	CMU Transfer	Why does the transferor need to provide certificates? they should already be there anyway as they currently hold the agreement?	<p>The Delivery Body has reviewed how company level Exhibits (A and C) are provided, the Delivery Body are committing to amending the proposal of uploading Exhibits A and C from an Application level to a Company level removing the requirement to upload multiple Exhibits during the CMU Transfer process.</p> <p>Please note this change will also amend the need to upload the Exhibits during Secondary Trading.</p> <p><b>Update:</b> Enhancement prioritised for delivery and expected to be progressed in our next development increment. Further details to be shared in the next playback session.</p>

# Secondary Trading Entrant Application

## Feature Description

Customers have the option of submitting a Secondary Trade Entrant Application after the relevant T-1 Auction Results have been released. These Applications are assessed similarly to a Prequalification Application, therefore need to be in accordance with the updated CM Rule requirements. Customers make this Application to become an Acceptable Transferee for the Secondary Trade process which will also be covered in this session.

## Customer Feedback Considered

- Confusion on the eligible CMU Types that can participate as an Entrant Application
- Queries regarding when the assessment will be completed

## High-level Requirements Proposed

- Having a separate Auction section where you can apply to indicate the application is a Secondary Trade Entrant Application.
- Only the relevant CMU Types will be available to select from to make an Application
- Once the Application is submitted the Applicant will receive an email confirmation with the date by which the Delivery Body should complete the assessment.
- An Applicant can withdraw and re-submit the Application at any time, provided the Delivery Body has not started their assessment.
- When creating an Application, the customer is advised that they will not be able to submit during the Prequalification Assessment window in order to be in line with CM Rule 3.13.1.

## My EMR

## CMU and Auction Management

**Company CMUs**

A complete list of all company CMU's that can be something something something.

**Exhibit Library**

All the Exhibits we require you to provide categorised by each CMU type.

**Outstanding Activities**

Submit required Information and or Documentation Post PQRD.

**Management Activities**

Body copy to be placed in here. Body copy to be placed in here.

**My Applications & Opt-Out Notifications**

Edit and update all your Auction applications related to this company.

**Application Results**

Body copy to be placed in here. Body copy to be placed in here.

**Delivery Body Notices**

Body copy to be placed in here. Body copy to be placed in here.

**Capacity Agreement Notices (CANs)**

Body copy to be placed in here. Body copy to be placed in here.

## Prequalification Auctions

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>

## Secondary Trade Entrant

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>



## My EMR / Manage T-1 Secondary Trade Entrant

[Cancel](#)[Create Application](#)

Filter Company

Filter CMU Status

Filter CMU Type

– Display All –

– Display All –

– Display All –

Search for CMU ID or Name



CMU ID ↓	CMU Name ↓	CMU Type ↓	Company Name ↓	Components
<input type="checkbox"/> AB73WV	D00005	Existing Generating	Company Name Spread over two lines	6
<input type="checkbox"/> AB73WV	D00006	Proven DSR	Company Name Spread over two lines	6
<input type="checkbox"/> AB73WV	D00007	Existing Interconnector	Company Name Spread over two lines	6





My EMR / Manage T-1 Secondary Trade Entrant

Cancel

Create Application

Filter Company

Filter CMU Status

Filter CMU Type

- Display All -

- Display All -

- Display All -

Search for CMU ID or Name



CMU ID ↓	CMU Name ↓	Company Name ↓	Components
<input checked="" type="checkbox"/> AB73WV	D00005	any Name Spread over es	6
<input type="checkbox"/> AB73WV	D00006	any Name Spread over es	6
<input type="checkbox"/> AB73WV	D00007	any Name Spread over es	6

Warning – Prequalification Assessment Window

Please note you will not be able to submit a Secondary Trade Entrant Application during the Prequalification Assessment Window as per Capacity Market Rule 3.13.1. You can still proceed with creating and saving an Application. Once the Prequalification Assessment Window closes you can then submit

Continue

<b>AB73WV</b> Existing Generating	<b>Status</b> Created	<b>Application ID</b> S-T-1-2023-AB73WV-00001	<b>Applicant Company</b> Company Name long long name
--------------------------------------	--------------------------	--	---

Cancel

Save

Submit Application



<b>Company</b> Company Name long name	<a href="#">View</a>
<b>CMU Type</b> Existing Generating	<a href="#">View</a>
<b>Components</b> 6 Components	<a href="#">View</a>
<b>Connection Capacity Details</b> Total Connection Capacity	<a href="#">Calculate</a> 0.000



## Company Name / Create Secondary Trade Application

AB73WV

Status

Application ID

Applicant Company

Existing Generating

Created

S-T-1-2023-AB73WV-00001

Company Name long long name

Cancel

Save

Submit Application

## Submit Application

Applications with incomplete details may be rejected  
by the Delivery Body.

Once Submitted, you will still have the option to update an Application  
by selecting Withdraw and re-submitting the updated Application up  
until the closure of the Secondary Trade Window.

Cancel

Submit Application

This field has been autmpopulated based on the setup of your Components related to this CMU and is determined as follows, if any of the CMU's components is set to "Yes" in the "Fossil Fuel Component Declaration" field then this field will be set to "Yes". If all the Components "Fossil Fuel Component Declaration" are set to "No" then this field is set to "No". If you need to change the content in this field, then please update the relevant CMU Components.



### My EMR / My Applications & Opt-Out Notifications

Filter Company

– Display All –

Filter Application Status

– Display All –

Filter CMU Type

– Display All –

Application Type

Secondary

Search for CMU ID or Name



Status ↓	CMU ID ↓	Application ID ↓	CMU Type ↓	Company Name ↓	Date Updated	Updated By	More
Submitted	AB73WV	S-T-1-2023-AB73WV-00001	Existing Generating	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	⋮ Manage Application
Created	AB73WV	S-T-1-2023-AB73WV-00001	Proven DSR	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	⋮
Created	AB73WV	S-T-1-2023-AB73WV-00001	Unproven DSR	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	⋮

## My EMR / Application Results

[Download .CSV](#)

## Filter Auction Year and Type

## Filter Company

## Filter CMU Type

## Filter Application Decision

## Filter Application Type

- Display All -

- Display All -

- Display All -

- Display All -

Secondary Trade

0

0

0

0

0

0

0

0

0

Total CMUs

Total Applications

No of Applications  
PrequalifiedNo of Applications  
Conditionally PrequalifiedNo of Applications  
RejectedTotal Connection  
Capacity (MW)Total De-Rated  
Capacity (MW)Total Prequalified De-Rated  
Capacity (MW)

Total Credit Cover

Application ID ↓

CMU Type ↓

Application Decision ↓

Company Name ↓

Confirmed  
Connection  
Capacity (MW) ↓De-Rated  
Capacity (MW) ↓Maximum  
Obligation Period ↓Download  
Application Letter ↓

More

S-T-1-2023-AB73WV-00001

Existing Generating

Conditionally  
PrequalifiedCompany Name  
Spread over two lines

000.000

000.000

XXX



View Results Overview

Raise a Dispute

View Disputes

S-T-1-2023-AB73WV-00001

Proven DSR

Prequalified

Company Name  
Spread over two lines

000.000

000.000

XXX

S-T-1-2023-AB73WV-00001

Unproven DSR

Prequalified

Company Name  
Spread over two lines

000.000

000.000

XXX



# Secondary Trading – Transferor and Transferee

## Feature Description

Secondary Trading is the process in which a Capacity Provider can trade their Capacity Obligation, either partially or in full, to an Acceptable Transferee CMU. Secondary Trading enables a CMU which has a planned or unplanned outage which impacts their ability to meet their Capacity obligation to hedge this risk by transferring the responsibility of delivery.

## Customer Feedback Considered

- Requires navigation from My Agreements area as opposed to isolated element which currently exists
- Clearer tracking of the Secondary Trade position needed
- Portal performance when creating a Secondary Trade Application is extremely slow
- Dropdown lists to select relevant Transferee CMU are unmanageable

## High-level Requirements Proposed

- Ability to navigate and initiate a Secondary Trade from viewing the CAN screen
- Clear understanding of outstanding requirements to become an Acceptable Transferee
- Ensure that any missing elements required by the Rules are clear and understood and cannot be submitted to the Delivery Body without this, reducing requirement of resubmission where applicable
- Transferee Evidence can specify Date and Settlement period where De-rated evidence has been achieved within Application
- Clear requirement of the date Transferee has achieved De-rating to be within 6 months of the Secondary Trade submission from the Transferor

My EMR / Capacity Agreement Notices (CANs)

Filter Auction: - Display All - | 
 Filter Company: - Display All - | 
 Filter Submission Status: - Display All - | 
 Filter Requirement: - Display All - | 
 Search CMU or CAN ID:

CAN ID ↓	CAN Status ↓	CMU Type ↓	Auction Type ↓	Company Name ↓	Auction Acquired Capacity Obligation (MW) ↓	Agreement Duration (Years) ↓	Download CAN Letters ↓	Download Appendix ↓	More
CAN-20XX-CMXXXX-XXX	Active (Termination in progress)	[Tye of CMU]	2022 T-4	Company Name Spread over two lines	000.000	00			
CAN-20XX-CMXXXX-XXX	Active	[Tye of CMU]	2022 T-4	Company Name Spread over two lines	000.000	00			

- View CAN details
- View Outstanding Activities
- Initiate Secondary Trade
- View Daily Capacity Obligation Table
- View AACO History Table
- View CAN previous versions

My EMR / Capacity Agreement Notices (CANs) / Initiate Trade

CAN ID	Auction Type	Company Name
CAN-20XX-CMUIII-XXX DSR	2022 T-4	Company Name long long name

Cancel

Save

Submit Trade

Initiate Trade

CMU to Trade

Please select the CMU ID that you wish to transfer to (Transferee).

XXXXXXXX

Continue



My EMR / Capacity Agreement Notices (CANs) / Initiate Trade

CAN ID	Auction Type	Company Name
CAN-20XX-CMUIXX-XXX DSR	2022 T-4	Company Name long long name

Cancel

Save

Submit Trade

Initiate Trade

CMU to Trade

Please select the CMU

XXXXXXXX

Warning – Errors found

There is a problem with the CMU entered, it is not eligible for this trade.

Continue

Continue

**CAN ID**  
CAN-20XX-CMUIXX-XXX DSR

**Auction Type**  
2022 T-4

**Delivery Year**  
2023-2024

**Company Name**  
Company Name long long name

Cancel

Save

Submit Trade

### Initiate Trade

#### CAN ID

CAN-20XX-CMUIXX-XXX DSR

#### Clearing Price

XXXXX

#### CMU to Trade

XXXXXXXX

#### Date from

Delivery years can't overlap and they must be 5 days from the creation to align.

XX/XX/XXXX

#### Date to

Delivery years can't overlap and they can't be past the end of the delivery year.

XX/XX/XXXX

#### Duration of Trade

Lorem Ipsum

#### MW to Trade

Transferor CMU in delivery year can't end up with between 1MW and 0MW, less than 0MW, and less than 1MW unless that is entire agreement.

XX.XXX

#### Metering Declaration

As per CM Rule 9.2.5 (b)(iii) Transfer of Capacity Agreement under Rule 9.2.4(a) can only be affected in respect of a CMU Transferor and CMU Transferee in respect of which there is not a breach of Rule 6.3.3(f) (metering changes).

- Yes  
 No  
 N/A

Browser tabs: ESO Nationalgrid/Amazingnewportal

Address bar: [https://www.nationalgrideso.com/emrdeliverybodyportal/My\\_EMR](https://www.nationalgrideso.com/emrdeliverybodyportal/My_EMR)

Navigation menu: My EMR | User Management | Company Management | CMU's & Components | Disputes

Logo: nationalgridESO | Electricity Market Reform Delivery Body

Page Title: My EMR / Capacity Agreement Notices (CANs) / Initiate Trade

CAN ID	Auction Type	Delivery Year	Company Name	Cancel	Save	Submit Trade
CAN-20XX-CMXXXX-XXX DSR	2022 T-4	2023-2024	Company Name long long name			

**Warning – Errors found**

There are some inconsistencies in the information collected.  
Go back and amend the highlighted fields in order to submit your trade.

[Continue](#)

Form fields (partially obscured by warning):

- Initiate Trade
- CAN ID: CAN-20XX-CMXXXX
- Clearing Price: XXXXX
- CMU to Trade: XXXXXXXXX

#### Date from

Delivery years can't overlap and they must be 5 days from the creation to align.

XX/XX/XXXX

Date does not match requirements.

#### Date to

Delivery years can't overlap and they can't be past the end of the delivery year.

XX/XX/XXXX

Date does not match requirements.

#### Duration of Trade

Lorem Ipsum

#### MW to Trade

Transferor CMU in delivery year can't end up with between 1MW and 0MW, less than 0MW, and less than 1MW unless that is entire agreement.

XX.XXX

CMU cannot end up with less than 0MW.

#### Metering Declaration

As per CM Rule 9.2.5 (b)(ii) Transfer of Capacity Agreement under Rule 9.2.4(a) can only be affected in respect of a CMU Transferor and CMU Transferee in respect of which there is not a breach of Rule 8.3.3(f) (metering changes).

- Yes  
 No  
 N/A

Metering Declaration required to submit trade.

#### Capacity Overview

Time Period	ΔPTCO	MCT	AACO	PTCO	CO	Test 1	Test 2	Test 4
10/01/2023 10/03/2023	9,999,999	9,999,999	9,999,999	9,999,999	9,999,999	Pass	Failed	Failed
12/05/2023 10/08/2023	9,999,999	9,999,999	9,999,999	9,999,999	9,999,999	Failed	Pass	Pass
07/07/2023 10/09/2023	9,999,999	9,999,999	9,999,999	9,999,999	9,999,999	Failed	Failed	Failed

**My EMR / Outstanding Activities**      Display:  Outstanding Activities    Acceptable Transferee Requirement    Completed Activities   [Download .CSV](#)

Filter Auction: - Display All -     
 Filter Company: - Display All -     
 Filter Submission Status: - Display All -     
 Filter Requirement: Transfer request     
 Search CMU or Application ID

Due Date ↓	Requirement ↓	Company Name ↓	CMU ID ↓	Application ID ↓	Agreement ID ↓	Submission St.. ↓	Delivery Bo.. ↓	Action
XX/XX/XXXX	Transfer request	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Secondary Trade Request	First 25 characters...	<ul style="list-style-type: none"> <li>Review Trade Details</li> <li style="color: red;">Withdraw Trade</li> </ul>
XX/XX/XXXX	Transfer request	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Secondary Trade Request	First 25 characters...	
XX/XX/XXXX	Transfer request	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Secondary Trade Request	First 25 characters...	
XX/XX/XXXX	Transfer request	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Secondary Trade Request	First 25 characters...	

My EMR / Capacity Agreement Notices (CANs) / Initiate Trade

CAN ID	Auction Type	Delivery Year	Company Name
CAN-20XX-CMUIXXX-XXX DSR	2022 T-4	2023-2024	Company Name long long name

Cancel

Withdraw This Submission

Initiate Trade

CAN ID

CAN-20XX-CMUIXXX-XXX DSR

Clearing Price

XXXXX

CMU to Trade

XXXXXXXXX

Date from

Delivery years can't overlap and they must be 5 days from the creation to align.

XX/XX/XXXX



Date to

Delivery years can't overlap and they can't be past the end of the delivery year.

XX/XX/XXXX



Browser tabs: ESO Nationalgrid/Amazingnewportal

Address bar: [https://www.nationalgrideso.com/emrdeliverybodyportal/My\\_EMR](https://www.nationalgrideso.com/emrdeliverybodyportal/My_EMR)

Navigation menu: My EMR | User Management | Company Management | CMU's & Components | Disputes

Logo: nationalgridESO | Electricity Market Reform Delivery Body

Page Title: My EMR / Capacity Agreement Notices (CANs) / Initiate Trade

CAN ID	Auction Type	Delivery Year	Company Name	
CAN-20XX-CMUIXX-XXX DSR	2022 T-4	2023-2024	Company Name long long name	<a href="#">Cancel</a> <a href="#">Withdraw This Submission</a>

### Warning - Withdrawing Trade

Please note this action cannot be undone.

Do you wish to continue?

[Cancel](#) [Withdraw This Submission](#)

Form fields (partially obscured):

- Initiate Trade
- CAN ID: CAN-20XX-CMUIXX
- Clearing Price: XXXXX
- Duration of Trade: Lorem Ipsum



## My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities[Download .CSV](#)

Filter Auction

Filter Company

Filter Submission Status

Filter Requirement

- Display All -

- Display All -

- Display All -

- Display All -

Search CMU or Application ID



Due Date ↓	Requirement ↓	Company Name ↓	CMU ID ↓	Application ID ↓	Agreement ID ↓	Submission St.. ↓	Delivery Bo.. ↓	Action
XX/XX/XXXX	Submit Metering Test Certificate	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Acceptable Transferee Requirement	First 25 characters...	<a href="#">Review Trade Details</a>
XX/XX/XXXX	Submit Pre Refurb Metering Test Certificate	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Acceptable Transferee Requirement	First 25 characters...	
XX/XX/XXXX	Submit Post Refurb Metering Test Certificate	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Acceptable Transferee Requirement	First 25 characters...	
XX/XX/XXXX	Submit Metering Test Certificate	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Acceptable Transferee Requirement	First 25 characters...	



<b>Company Name</b> Company Name long long name	<b>CMU ID</b> 123456	<b>Application ID</b> T-3-2026-123456-0001	<b>Agreement ID</b> T-X-20XX-XXXXXX-XXXX	Cancel	Save	Reject Request	Accept Request
--	-------------------------	---	---	--------	------	----------------	----------------

**Review Trade Details**

Please see details of Secondary Trade and confirm whether you Reject or Accept.

**Transferee CAN ID**  
CAN-20XX-CMUIXX-XXX DSR

**Date From**  
XX/XX/XXXX

**Date To**  
XX/XX/XXXX

**Duration of Trade**  
Lorem Ipsum

**MW to Trade**  
XX.XXX

**Metering Declaration**

As per CM Rule 9.2.5 (b)(iii) Transfer of Capacity Agreement under Rule 9.2.4(a) can only be affected in respect of a CMU Transferor and CMU Transferee in respect of which there is not a breach of Rule 8.3.3(f) (metering changes).

- Yes
- No
- N/A

To satisfy the requirement of 9.2.6 (e)(ii)(bb) please upload evidence of achieving your de-rated capacity on at least one settlement period for the six months prior to the trade being initiated. If you have met this capacity requirement on multiple settlement periods any can be selected.

**De-rated Capacity Evidence**

You must upload evidence of your De-rated capacity for the past 6 months of trade.

The following filetypes are accepted: .JPG, .PDF, .PNG,.XLS., max 2Gb

or Drop Files

**De-Rated Capacity Demonstrated Date**

XX/XX/XXXX

**Settlement Period De-Rated Capacity**

Enter

Browser tabs: ESO Nationalgrid/Amazingnewportal

Address bar: [https://www.nationalgrideso.com/emrdeliverybodyportal/My\\_EMR](https://www.nationalgrideso.com/emrdeliverybodyportal/My_EMR)

Navigation menu: My EMR | User Management | Company Management | CMU's & Components | Disputes

Logo: nationalgridESO | Electricity Market Reform Delivery Body

### My EMR / Outstanding Activities / Secondary Trade Details

Company Name	CMU ID	Application ID	Agreement ID	
Company Name long long name	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	<a href="#">Cancel</a> <a href="#">Save</a> <a href="#">Reject Request</a> <a href="#">Accept Request</a>

#### Accept Secondary Trade

Review Trade De

Please see details of

Transferee CAN ID  
CAN-20XX-CMXXXX

Date From  
XX/XX/XXXX

Date To  
XX/XX/XXXX

Duration of Trade  
Lorem Ipsum

MW to Trade  
XX.XXX

Cancel [Accept Secondary Trade](#)

Browser tabs: ESO Nationalgrid/Amazingnewportal

Address bar: https://www.nationalgrideso.com/emrdeliverybodyportal/My\_EMR

Navigation menu: My EMR | User Management | Company Management | CMU's & Components | Disputes

Logo: nationalgridESO | Electricity Market Reform Delivery Body

Breadcrumbs: My EMR / Outstanding Activities / Secondary Trade Details

Company Name	CMU ID	Application ID	Agreement ID	
Company Name long long name	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Cancel Save Reject Request Accept Request

**Warning – Errors found**

There are some inconsistencies in the information collected.  
Go back and amend the highlighted fields in order to submit your trade.

Continue

**Review Trade De**

Please see details of

**Transferee CAN ID**  
CAN-20XX-CMXXXX

**Date From**  
XX/XX/XXXX

**Date To**  
XX/XX/XXXX

**Duration of Trade**  
Lorem Ipsum

**MW to Trade**  
XX.XXX

### Metering Declaration

As per CM Rule 9.2.5 (b)(iii) Transfer of Capacity Agreement under Rule 9.2.4(a) can only be affected in respect of a CMU Transferor and CMU Transferee in respect of which there is not a breach of Rule 8.3.3(f) (metering changes).

Yes

No

N/A

**Metering Declaration required to submit trade.**

To satisfy the requirement of 9.2.6 (e)(ii)(bb) please upload evidence of achieving your de-rated capacity on at least one settlement period for the six months prior to the trade being initiated. If you have met this capacity requirement on multiple settlement periods any can be selected.

### De-rated Capacity Evidence

You must upload evidence of your De-rated capacity for the past 6 months of trade.

The following filetypes are accepted: .JPG, .PDF, .PNG, .XLS., max 2Gb

or Drop Files

### De-Rated Capacity Demonstrated Date

XX/XX/XXXX 

**Date must be in the last 6 months.**

### Settlement Period De-Rated Capacity

Enter 

ESO Nationalgrid/Amazingnewportal

https://www.nationalgrideso.com/emrdeliverybodyportal/My\_EMR

My EMR | User Management | Company Management | CMU's & Components | Disputes | nationalgridESO | Electricity Market Reform Delivery Body

My EMR / Outstanding Activities / Secondary Trade Details

Company Name	CMU ID	Application ID	Agreement ID	Cancel	Save	Reject Request	Accept Request
Company Name long long name	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX				

### Accept Secondary Trade

Review Trade De

Please see details of

Transferee CAN ID  
CAN-20XX-CMXXXX

Date From  
XX/XX/XXXX

Date To  
XX/XX/XXXX

Duration of Trade  
Lorem Ipsum

Cancel

Accept Secondary Trade

My EMR / Outstanding Activities Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities [Download .CSV](#)

Filter Auction: 
 Filter Company: 
 Filter Submission Status: 
 Filter Requirement: 
 Search CMU or Application ID:

Due Date ↓	Requirement ↓	Company Name ↓	CMU ID ↓	Application ID ↓	Agreement ID ↓	Submission St.. ↓	Delivery Bo.. ↓	Action
XX/XX/XXXX	Transfer request	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Secondary Trade Request	First 25 characters...	<ul style="list-style-type: none"> <li>Review Trade Details</li> <li>Withdraw Trade</li> </ul>
XX/XX/XXXX	Transfer request	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Secondary Trade Request	First 25 characters...	
XX/XX/XXXX	Transfer request	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Secondary Trade Request	First 25 characters...	
XX/XX/XXXX	Transfer request	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Secondary Trade Request	First 25 characters...	

My EMR / Outstanding Activities / Secondary Trade Details

Company Name	CMU ID	Application ID	Agreement ID	Cancel	Save	Reject Request	Accept Request
Company Name long long name	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX				

### Review Trade Details

Please see details of the trade below.

**Transferee CAN ID**  
CAN-20XX-CMUXXXX

**Date From**  
XX/XX/XXXX

**Date To**  
XX/XX/XXXX

**Duration of Trade**  
Lorem Ipsum

**MW to Trade**  
XX.XXX

### Reject Secondary Trade

Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet.

## My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities[Download .CSV](#)

Filter Auction

Filter Company

Filter Submission Status

Filter Requirement

- Display All -

- Display All -

- Display All -

- Display All -

Search CMU or Application ID



Due Date ↓ ▾	Requirement ↓ ▾	Company Name ↓ ▾	CMU ID ↓ ▾	Application ID ↓ ▾	Agreement ID ↓ ▾	Submission St.. ↓ ▾	Delivery Bo.. ↓ ▾	Action
XX/XX/XXXX	Submit Metering Test Certificate	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Acceptable Transferee Requirement	First 25 characters...	<a href="#">Review Trade Details</a>
XX/XX/XXXX	Submit Pre Refurb Metering Test Certificate	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Acceptable Transferee Requirement	First 25 characters...	
XX/XX/XXXX	Submit Post Refurb Metering Test Certificate	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Acceptable Transferee Requirement	First 25 characters...	
XX/XX/XXXX	Submit Metering Test Certificate	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Acceptable Transferee Requirement	First 25 characters...	



My EMR / Outstanding Activities / Secondary Trade Details

**Company Name**

Company Name long long name

**CMU ID**

123456

**Application ID**

T-3-2026-123456-0001

**Agreement ID**

T-X-20XX-XXXXXX-XXXX

Cancel

Save

Reject Request

Accept Request

**Review Trade Details**

Please see details of Secondary Trade and confirm whether you Reject or Accept.

**Transferee CAN ID**

CAN-20XX-CMXXXX-XXX DSR

**Date From**

XX/XX/XXXX

**Date To**

XX/XX/XXXX

**Duration of Trade**

Lorem Ipsum

**MW to Trade**

XX.XXX

# Withdraw/Extend Termination Notice

## Feature Description

Following a Termination Notice being issued this can be appealed to DESNZ. This appeal should still be completed outside of the portal and DESNZ will inform the Delivery Body of the outcome. If the appeal is unsuccessful there will be no change to the final termination date, if the appeal is successful, it will either be extended or withdrawn with the appropriate letter issued. If the termination is extended with a Cure Plan which expects a standard milestone submission this will be available through Outstanding Activities. This does not include disputed terminations.

## Customer Feedback Considered

- Difficulty finding existing Terminations and their status in the current portal
- Confusion about where in the portal a submission should be made

## High-level Requirements Proposed

- Internal tracking of DESNZ decisions
- Email notifications of any changes to the termination event
- Termination overview screen shows up to date Final Termination Date at all times and gives the ability to download any letters related to the termination
- Cure Plan submissions that follow established processes can be tracked and submitted through the Outstanding Activities screen to provide greater transparency



### My EMR / CAN Termination Notices

Back

Filter Capacity Auction

- Display All -

Filter Company

- Display All -

Filter CMU Type

- Display All -

Filter CAN Status

- Display All -

CAN-2024-dbnkTo-001



CAN ID	Termination Date	Reason	CAN Status	Reference ID	Termination Notice Letter	Extension Letter	Withdrawal Letter	Final Termination Letter
CAN-2024-dbnkTo-001	28/04/2023	6.10.1(ba) - Failure to lodge credit cover (New Build CMU)	Active (Termination in Progress)	PAR-08396				

Displayed: 1 items

# Minimum Completion Requirement (MCR)

## Feature Description

To comply with the MCR milestone under rule 6.8.3/6.8.3A we will allow submission of the required ITE report and any appendices for each agreement, tracked via the Outstanding Activities page. Under rule 6.7.6 any prospective generating CMU may increase the operational physical capacity up to 100% by providing further MCR/SCM submissions.

## Customer Feedback Considered

- No specific location to upload MCR or future submissions
- Need for the portal to be 'opened' for submissions after DY end
- Ease of navigation – the current portal makes it too difficult to find different obligations.
- File upload is often slow or simply fails.
- Inability to see what files have been uploaded, especially if using zip files.

## High-level Requirements Proposed

- MCR and SCM will be available as the same milestone in Outstanding Activities with the option to choose the submission type. This allows for easier navigation and a better audit history
- The submission will allow for multiple file uploads and the ability to preview documents and save the submission
- Following the first submission if it is less than 100% of the de-rated capacity there will be an optional milestone to resubmit
- A fossil fuel reminder will appear before submission to prompt submission of the emissions milestone. For the first release this will be a generic reminder.

My EMR / Outstanding Activities | Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities | Download .CSV

Filter Auction: - Display All - | Filter Company: - Display All - | Filter Submission Status: - Display All - | Filter Requirement: Submit SCM/MCR | Search CMU or Application ID

Due Date ↓	Requirement ↓	Company Name ↓	CMU ID ↓	Application ID ↓	Agreement ID ↓	Submission St.. ↓	Delivery Bo.. ↓	Action
------------	---------------	----------------	----------	------------------	----------------	-------------------	-----------------	--------

XX/XX/XXXX	Submit SCM/MCR	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Resubmission for Re...	First 25 characters...	
------------	----------------	------------------------------------	--------	----------------------	----------------------	------------------------	------------------------	--

Manage Submissions

My EMR / Outstanding Activities / Submit SCM/MCR

<b>Applicant Company</b> Company Name long long name	<b>CMU ID</b> <123XXX>	<b>Application ID</b> <T-X-20XX-XXXX-XXX>	<b>Agreement ID</b> <T-X-20XX-XXXX-XXX>	Cancel	Save	Submit Trade
---	---------------------------	--	--	--------	------	--------------

**Submit SCM/MCR**  
Please answer and submit documents relevant to your Substantial Completion Milestone (SCM) or Minimum Completion Requirement (MCR).

**SCM/MCR Submission**  
Is this submission for the Substantial Completion Milestone (SCM) or Minimum Completion Requirement (MCR)?  
Please select one option

**Submit SCM/MCR Documents**  
Upload the ITE report and any associated appendices to meet the Substantial Completion Milestone (as per Rule 6.7) or Minimum Completion Requirement (as per Rule 6.8.3/6.8.3A)  
The following filetypes are accepted: .JPG, .PDF, .PNG, .XLS., max 2Gb

[Upload Files](#) or Drop Files

Browser tabs: ESO Nationalgrid/Amazingnewportal

Address bar: [https://www.nationalgrideso.com/emrdeliverybodyportal/My\\_EMR](https://www.nationalgrideso.com/emrdeliverybodyportal/My_EMR)

Navigation menu: My EMR | User Management | Company Management | CMU's & Components | Disputes

Logo: nationalgridESO | Electricity Market Reform Delivery Body

Breadcrumbs: My EMR / Outstanding Activities / Submit SCM/MCR

Applicant Company	CMU ID	Application ID	Agreement ID	
Company Name long long name	<123XXX>	<T-X-20XX-XXXXX-XXX>	<T-X-20XX-XXXXX-XXX>	Cancel Save Submit Trade

### Component with Fossil Fuel

If you have a component containing a Fossil Fuel please check your emissions obligations before submitting SCM/MCR documentation, depending on your formula type this may affect your emissions deadline.

Close

Submit SCM/MCR Documents

Upload the ITE report and any associated appendices to meet the Substantial Completion Milestone (as per Rule 6.7) or Minimum Completion Requirement (as per Rule 6.8.3/6.8.3A)

The following filetypes are accepted: .JPG, .PDF, .PNG, .XLS., max 2Gb

Upload Files or Drop Files

My EMR / Outstanding Activities Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities [Download .CSV](#)

Filter Auction: - Display All - Filter Company: - Display All - Filter Submission Status: - Display All - Filter Requirement: Submit SCM/MCR Search CMU or Application ID

Due Date ↓	Requirement ↓	Company Name ↓	CMU ID ↓	Application ID ↓	Agreement ID ↓	Submission St.. ↓	Delivery Bo.. ↓	Action
------------	---------------	----------------	----------	------------------	----------------	-------------------	-----------------	--------

XX/XX/XXXX	Submit SCM/MCR	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Resubmission for Re...	First 25 characters...	<a href="#">Manage Submissions</a>
------------	----------------	------------------------------------	--------	----------------------	----------------------	------------------------	------------------------	------------------------------------



# Pre-Auction Activities – Confirmation of Entry, Length of Agreement and DSR Bidding Capacity

Sli.do #141 7572

## Feature Description

Following Prequalification, those with a Prequalified Application are able to complete specific Pre-Auction Activities, with those covered today currently appearing within the relevant Confirmation of Entry window. The processes being covered are Confirmation of Entry, Length of Agreement and DSR Bidding Capacity. Due to the Capacity Market Rules, the former items have been kept as a part of the 5 Working Day window with the latter now being able to be amended with a Prequalified Application following Prequalification up until the closure of the relevant Confirmation of Entry window.

## Customer Feedback Considered

- Separate process required to be completed for each specific Auction requirement
- Difficult to understand if a process has been performed correctly and have to check with DB
- Lack of visibility of requirements to be completed
- Current system applicable CMUs are defaulted to “No” for Confirming Entry

## High-level Requirements Proposed

- Confirmation of Entry, Length of Agreement and DSR Bidding Capacity appears within single Pre-Auction Activities Milestone
- Milestone will appear in Outstanding Activities list for a Prequalified Application following Prequalification Results Day with close date set as Confirmation of Entry Close
- Notification will be received by e-mail when a change on the milestone occurs as well as a green banner upon the Portal
- Different statuses to be shown on Milestone with Submission Outstanding no change to any of the relevant fields and Submission Saved for where a change has been made to at least 1 of the options
- Confirmation of Entry position will be defaulted to “Yes” in V2 Portal



My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities

[Download .CSV](#)

Filter Auction

Filter Company

Filter Submission Status

Filter Requirement

- Display All -

- Display All -

- Display All -

Pre Auction Activities

Search CMU or Application ID

Due Date ↓

Requirement ↓

Company Name ↓

CMU ID ↓

Application ID ↓

Agreement ID ↓

Submission St.. ↓

Delivery Bo.. ↓

Action

XX/XX/XXXX

Pre Auction Activities

Company Name  
Spread over two lines

123456

T-3-2026-123456-0001

Submission Outstanding First 25 characters...

Manage Submission

<b>Applicant Company</b> Company Name long long name	<b>CMU ID</b> <123XXX>	<b>Application ID</b> <T-X-20XX-XXXXX-XXX>	Cancel	Save	Submit Details
---	---------------------------	---	--------	------	----------------

**Submit Pre Auction Activities**

**Confirmation of Entry**  
Please select "Yes" if you wish to participate in the selected upcoming Capacity Market Auction for this CMU. Please select "No" if you do not wish to participate in the selected upcoming Capacity Market Auction for this CMU.

Yes  
 No

**Length of Agreement**  
Please enter the duration of Capacity Agreement (in a whole number of years) that you would require should the Capacity Market Auction clear at the Price Cap. This value should be less than or equal to the Maximum Obligation Period. For Unproven DSR CMUs the Length of Agreement should be atleast 2 Delivery Years.

XX

**DSR Bidding Capacity**  
Please enter the DSR Bidding Capacity for the CMU for the relevant Capacity Market Auction in MW. Please note that this value must be less than or equal to the DB Verified De-Rated Capacity for the CMU.

XX.XXX



✔ You have successfully submitted your pre auction activities ✕

My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities

[Download .CSV](#)

Filter Auction

Filter Company

Filter Submission Status

Filter Requirement

- Display All -

- Display All -

- Display All -

Pre Auction Activities

Search CMU or Application ID



Due Date ↓	Requirement ↓	Company Name ↓	CMU ID ↓	Application ID ↓	Agreement ID ↓	Submission St.. ↓	Delivery Bo.. ↓	Action
XX/XX/XXXX	Pre Auction Activities	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Submission Saved	First 25 characters...	

My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities

[Download .CSV](#)

Filter Auction:  Filter Company:  Filter Submission Status:  Filter Requirement:  Search CMU or Application ID:

Due Date ↓	Requirement ↓	Company Name ↓	CMU ID ↓	Application ID ↓	Agreement ID ↓	Submission St.. ↓	Delivery Bo.. ↓	Action
XX/XX/XXXX	Pre Auction Activities	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Submission Saved	First 25 characters...	<div style="border: 1px solid gray; padding: 5px; display: inline-block;">                     Manage Submission                 </div>

My EMR / Outstanding Activities / Submit Pre Auction Activities

<b>Applicant Company</b> Company Name long long name	<b>CMU ID</b> <123XXX>	<b>Application ID</b> <T-X-20XX-XXXXX-XXX>	<a href="#">Cancel</a> <a href="#">Save</a> <a href="#">Submit Details</a>
---	---------------------------	---	--

### Submit Pre Auction Activities

---

**Confirmation of Entry**  
As an Existing Generating CMU or an Existing Interconnector CMU, the CMU has been automatically entered into the upcoming Capacity Market Auction that this Application relates

Yes  
 No

**Length of Agreement**  
As an Existing Generating CMU or an Existing Interconnector CMU, the CMU has been automatically entered into the upcoming Capacity Market Auction that this Application relates with 1 year as the length of agreement

1

My EMR / My Applications & Opt-Out Notifications

Filter Company: - Display All - | Filter Application Status: - Display All - | Filter CMU Type: - Display All - | Search CMU or Application ID

Status ↓	CMU ID ↓	Application ID ↓	CMU Type ↓	Company Name ↓	Date Updated	Updated By	Results Letter	More
Created	AB73WV	A-T-1-2023-AB73WV-00001	Refurbishing Interconnector	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	PDF	⋮
Created	AB73WV	A-T-1-2023-AB73WV-00001	Unproven DSR	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	PDF	⋮
Created	AB73WV	A-T-1-2023-AB73WV-00001	New Build Generating	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	PDF	⋮

Manage Application



Company Name / Create Application

AB73WV	Status	Application ID	Applicant Company	
Unproven DSR	Created	A-T-1-2023-AB73WV-00001	Company Name long long name	<a href="#">Cancel</a>

Review Details

Applications Questions

Declarations

Emissions

Pre Auction Activities

Pre Auction Activities





AB73WV

Unproven DSR

Status

Created

Application ID

A-T-1-2023-AB73WV-00001

Applicant Company

Company Name long long name

Cancel

Review Details

Applications Questions

Declarations

Emissions

Pre Auction Activities

### Pre Auction Activities



Please note that the details below have been provided as a result of your Pre Auction Activities

#### Confirmation of Entry

Your confirmation details for the upcoming Capacity Market Auction

- Yes  
 No

#### Length of Agreement

Length of Agreement confirmed for upcoming Capacity Market Auction

1

#### DSR Bidding Capacity

DSR Bidding Capacity confirmed for upcoming Capacity Market Auction

1

# Satisfactory Performance Days

## Feature Description

A Capacity Committed CMU with a Capacity Obligation must demonstrate to the Delivery Body in accordance with CM Rule 13.4.2, capacity at a level equal to or greater than its Capacity Obligation or aggregate Capacity Obligations in case of a CMU Portfolio for at least one Settlement Period, on three separate days during the Winter of the relevant Delivery Year.

## Customer Feedback Considered

- Continuation of the new improved process whereby the Electricity Settlement Company (ESC) publish a SPD Pass Report on their website.
- Ease of navigation – the current portal makes it too difficult to find different obligations

## High-level Requirements Proposed

- A task in Outstanding Activities will be created for all eligible CMUS at the start of the Winter Period. This will provide functionality for single or CMU Portfolio submissions. Every task will be automatically closed based on the SPD Pass Report uploaded into the New Portal.
- Conditions have been applied to the proposed dates of Satisfactory Performance Days to help reduce submission failure (Agreement specific, eg Capacity Agreements awarded in Capacity Auctions after Dec 2017)
- For Portfolio Submissions, Standard automatic email notification following EMR DB approval or rejection
- The EMR DB will incorporate the successful introduction of the SPD Pass Report and upload into the New Portal which will automatically close matching outstanding tasks.
- The intention is to amend due date against the tasks to the 31<sup>st</sup> July for those CMUs which have not met the SPD obligation during the Winter Period. (Agreement specific, eg Capacity Agreements awarded in Capacity Auctions after Dec 2017)
- The suspension and resumption of capacity payments will be covered in a later feature.



## My EMR

## CMU and Auction Management



## Company CMUs

A complete list of all company CMU's that can be something something something.



## Exhibit Library

All the Exhibits we require you to provide categorised by each CMU type.



## Outstanding Activities

Submit required Information and or Documentation Post PQRD.



## Management Activities

Body copy to be placed in here. Body copy to be placed in here.



## My Applications &amp; Opt-Out Notifications

Edit and update all your Auction applications related to this company.



## Application Results

Body copy to be placed in here. Body copy to be placed in here.



## Delivery Body Notices

Body copy to be placed in here. Body copy to be placed in here.



## Capacity Agreement Notices (CANs)

Body copy to be placed in here. Body copy to be placed in here.

## Prequalification Auctions

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>

## Secondary Trade Entrant

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>

My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities

[Download .CSV](#)

Filter Auction: - Display All -
 Filter Company: - Display All -
 Filter Submission Status: - Display All -
 Filter Requirement: Submit SPD
Search CMU or Application ID 🔍

Due Date ↓ ▾	Requirement ↓ ▾	Company Name ↓ ▾	CMU ID ↓ ▾	Application ID ↓ ▾	Agreement ID ↓ ▾	Submission St.. ↓ ▾	Delivery Bo.. ↓ ▾	Action
XX/XX/XXXX	Submit SPD	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Submission Outstanding	First 25 characters...	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Manage Submission</div>



My EMR / Outstanding Activities / Submit SPD

**Applicant Company**

Company Name long long name

**CMU ID**

<123XXX>

**Application ID**

<T-X-20XX-XXXXXX-XXX>

**Agreement ID**

<T-X-20XX-XXXXXX-XXX>

Cancel

Save

Submit Request

**Satisfactory Performance Days Submission**

Please select the SPD submission type and complete the following information.

- I want to do a **Single SPD Submission**
- I want to do a **Portfolio SPD Submission**

Continue



My EMR / Outstanding Activities / Submit SPD

**Applicant Company**

Company Name long long name

**CMU ID**

<123XXX>

**Application ID**

<T-X-20XX-XXXXX-XXX>

**Agreement ID**

<T-X-20XX-XXXXX-XXX>

Cancel

Save

Submit Details

**Submit Satisfactory Performance Days**

Please enter the appropriate number of dates in accordance with rule 13.4  
At least one SPD Day must be between 1st January and 30th April

**Satisfactory Performance Day 1**

Please enter the date of the first proposed Satisfactory Performance Day

DD/MM/YYYY



**Satisfactory Performance Day 2**

Please enter the date of the second proposed Satisfactory Performance Day

DD/MM/YYYY



**Satisfactory Performance Day 3**

Please enter the date of the third proposed Satisfactory Performance Day

DD/MM/YYYY



## My EMR / Outstanding Activities / Submit SPD

## Applicant Company

Company Name long long name

## CMU ID

&lt;123XXX&gt;

## Application ID

&lt;T-X-20XX-XXXXX-XXX&gt;

## Agreement ID

&lt;T-X-20XX-XXXXX-XXX&gt;

Cancel

Save

Submit Details

## Submit Satisfactory Performance Days

Please enter the appropriate number of dates in accordance with rule 13.4.  
At least one SPD Date must be between 1st January and 30th April

## Satisfactory Performance Day 1

Please enter the date of the first proposed Satisfactory Performance Day

DD/MM/YYYY 

## Satisfactory Performance Day 2

Please enter the date of the second proposed Satisfactory Performance Day

DD/MM/YYYY 

## Satisfactory Performance Day 3

Please enter the date of the third proposed Satisfactory Performance Day

DD/MM/YYYY 

## Select Capacity Market Units

Please select one or more CMU for portfolio SPD submission

Search CMU ID 

Due Date	CMU ID	Agreement ID	Select
XX/XX/XXXX	15XXXX	T-X-20XX-XXXXXX-XXXX	<input type="checkbox"/>
XX/XX/XXXX	14XXXX	T-X-20XX-XXXXXX-XXXX	<input type="checkbox"/>
XX/XX/XXXX	13XXXX	T-X-20XX-XXXXXX-XXXX	<input type="checkbox"/>
XX/XX/XXXX	12XXXX	T-X-20XX-XXXXXX-XXXX	<input type="checkbox"/>
XX/XX/XXXX	19XXXX	T-X-20XX-XXXXXX-XXXX	<input type="checkbox"/>



✔ You have successfully submitted your Satisfactory Performance Days ✕

My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities

[Download .CSV](#)

Filter Auction

Filter Company

Filter Submission Status

Filter Requirement

- Display All -

- Display All -

- Display All -

Submit SPD

Search CMU or Application ID



Due Date ↓ ▾	Requirement ↓ ▾	Company Name ↓ ▾	CMU ID ↓ ▾	Application ID ↓ ▾	Agreement ID ↓ ▾	Submission St.. ↓ ▾	Delivery Bo.. ↓ ▾	Action
--------------	-----------------	------------------	------------	--------------------	------------------	---------------------	-------------------	--------

XX/XX/XXXX	Submit SPD	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Submitted for Review	First 25 characters...	▾
------------	------------	---------------------------------------	--------	----------------------	----------------------	----------------------	------------------------	---



# Construction Progress Report

## Feature Description

The monitoring of Construction Progress is required to ensure that all Prospective CMUs are on track to deliver capacity. Construction progress reports are required every six months from 1<sup>st</sup> June after the Capacity Market Agreement is awarded and until the Substantial Completion Milestone (SCM) has been met.

All Prospective CMUs that have not yet achieved SCM are required to provide; a regular six monthly progress report specifying a schedule of milestones, an over-arching technical summary of progress and a Director's Certificate.

## Customer Feedback Considered

- Easy navigation and milestone tracking
- Reliance on emails to notify customers of obligations, these do not always go to the individual accountable for that process within the organisation.
- File upload is often slow or simply fails.
- Lack of clarity around what is required for a given CMU.

## High-level Requirements Proposed

- CMU type specific tasks provided with appropriate due dates located in Outstanding Activities
- Conditions built into New Portal to provide the 3 month and 9 month progress report tasks if applicable based on Capacity Auction date (not normally expected)
- One outstanding activity available at any one time.
- Clearly labelled and easy to use document upload functionality
- Mandatory conditions implemented into the submission to help reduce non-compliance. E.g missing documents not uploaded
- For the anticipated Go Live date, if Remedial Plans are required then the Delivery Body Notices feature will be used to provide this functionality.
- Standard automatic email notification following EMR DB approval or rejection



## My EMR

## CMU and Auction Management



## Company CMUs

A complete list of all company CMU's that can be something something something.



## My Applications &amp; Opt-Out Notifications

Edit and update all your Auction applications related to this company.



## Exhibit Library

All the Exhibits we require you to provide categorised by each CMU type.



## Application Results

Body copy to be placed in here. Body copy to be placed in here.



## Outstanding Activities

Submit required Information and or Documentation Post PQRD.



## Delivery Body Notices

Body copy to be placed in here. Body copy to be placed in here.



## Management Activities

Body copy to be placed in here. Body copy to be placed in here.



## Capacity Agreement Notices (CANs)

Body copy to be placed in here. Body copy to be placed in here.

## Prequalification Auctions

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>

## Secondary Trade Entrant

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>



My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities

[Download .CSV](#)

Filter Auction

Filter Company

Filter Submission Status

Filter Requirement

- Display All -

- Display All -

- Display All -

Submit Construction Report

Search CMU or Application ID

Due Date ↓	Requirement ↓	Company Name ↓	CMU ID ↓	Application ID ↓	Agreement ID ↓	Submission St.. ↓	Delivery Bo.. ↓	Action
XX/XX/XXXX	Submit Construction Report	Company Name Spread over two lines	123456	T-3-2026-123456-0001	T-X-20XX-XXXXXX-XXXX	Submission Outstanding	First 25 characters...	<ul style="list-style-type: none"> <li>Manage Submission</li> </ul>

## My EMR / Outstanding Activities / Submit Construction Report

**Applicant Company**

Company Name long long name

**CMU ID**

&lt;123XXX&gt;

**Application ID**

&lt;T-X-20XX-XXXXX-XXX&gt;

**Agreement ID**

&lt;T-X-20XX-XXXXX-XXX&gt;

[Cancel](#)[Save](#)[Submit Details](#)**Submit Construction Report**

Please provide a description of the nature of the construction, re-powering or refurbishment works to be undertaken

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**Construction Report**

Upload the construction report

The following filetypes are accepted: .JPG, .PDF, .PNG, .XLS, max 2Gb

[Upload Files](#) or Drop Files

**Directors Certificate**

Upload the director certificate

The following filetypes are accepted: .JPG, .PDF, .PNG, .XLS, max 2Gb

[Upload Files](#) or Drop Files

✔ You have successfully submitted your Construction Report ✕

My EMR / Outstanding Activities

Display:  Outstanding Activities  Acceptable Transferee Requirement  Completed Activities

[Download .CSV](#)

Filter Auction

Filter Company

Filter Submission Status

Filter Requirement

- Display All -

- Display All -

- Display All -

Submit Construction Report

Search CMU or Application ID



Due Date ↓ ▾

Requirement ↓ ▾

Company Name ↓ ▾

CMU ID ↓ ▾

Application ID ↓ ▾

Agreement ID ↓ ▾

Submission St.. ↓ ▾

Delivery Bo.. ↓ ▾

Action

XX/XX/XXXX

Submit Construction Report

Company Name  
Spread over two lines

123456

T-3-2026-123456-0001

T-X-20XX-XXXXXX-XXXX

Submitted for Review

First 25 characters... ▾

# Exhibit Generation including Evergreen Exhibits

## Feature Description

An Applicant requires a template to be able to create an Exhibit. The Delivery Body create Exhibit templates using the most current CM Rules, these are in turn stored in a template storage area from where they are accessed by the Applicant.

## Customer Feedback Considered

- The current offline Exhibit Tool creates extra dummy documents that are not needed.
- The current tool is prone to error messages that does not affect the generation of the relevant Exhibit
- Enable reuse for future PQ rounds of those Exhibits that Ofgem have considered as “Evergreen”

## High-level Requirements Proposed

- The Applicant will have the ability to access the latest version of standard Exhibit templates and be able to create their own Exhibit forms using these templates.
- An electronic Exhibit Generation process will be embedded in to the Portal (for PQ exhibits initially) to support creation and submission directly in the portal or an Applicant may download and complete an Exhibit manually then upload.
- An option will be available to to re-use Evergreen Exhibits.
- There will be an option to filter on CMU Type, to give an indication which Exhibits are Applicable for certain CMU Types
- Certain sections of the Exhibit will be auto-populated if the information can be found in the system (i.e. Company Name, Address and Registration Number).
- An External Party user has the ability to send the completed Exhibit form to Director(s) for signature (*Digital Signature process to be presented in later playback*)
- There would be the ability to preview the Exhibit form as the user is completing the relevant Exhibit
- Once an Exhibit is used in an Application, the Applicant will have the option to view all of the Exhibits used in the Application

## My EMR

## CMU and Auction Management

**Company CMUs**

A complete list of all company CMU's that can be something something something.

**My Applications & Opt-Out Notifications**

Edit and update all your Auction applications related to this company.

**Exhibit Library**

All the Exhibits we require you to provide categorised by each CMU type.

**Application Results**

Body copy to be placed in here. Body copy to be placed in here.

**Outstanding Activities**

Submit required Information and or Documentation Post PQRD.

**Delivery Body Notices**

Body copy to be placed in here. Body copy to be placed in here.

**Management Activities**

Body copy to be placed in here. Body copy to be placed in here.

**Capacity Agreement Notices (CANs)**

Body copy to be placed in here. Body copy to be placed in here.

## Available Auctions

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>

## CMU Auction Status

Awaiting information.



## My EMR / Exhibit Library

Display:  Exhibit Templates  Your Generated Exhibits

Filter CMU Type

Filter Exhibit Type

- Display All -

- Display All -

Search for Exhibit name



Exhibit Name ↓	Description	Exhibit Version ↓	Exhibit Type ↓	Actions
Exhibit A	Form of Prequalification Certificate	v1	Regular	▼
Exhibit B	Form of Price-Maker Certificate	v1	Regular	▼
Exhibit C	Form of Certificate of Conduct	v1	Evergreen	▼
Exhibit D	Form of Applicant Declaration	v1	Evergreen	▼
Exhibit DA	Form of Joint Owner Declaration for Existing Interconnector CMU	v2	Evergreen	▼
Exhibit DB	Alternative form of Joint Owner Declaration for Existing Interconnector CMU	v1	Evergreen	▼
Exhibit DC	Alternative form of Joint Owner Declaration for Prospective Interconnector CMU	v1	Evergreen	▼

- Create Exhibit from template
- View Exhibit template info
- Download Exhibit template



## Viewing Exhibit Template Information

### Exhibit DC - Template

<b>Description</b>	Alternative form of Joint Owner Declaration for Prospective Interconnector CMU
<b>Exhibit Template Version</b>	v1
<b>Exhibit Type</b>	Evergreen
<b>CMU Types</b>	New Build Interconnector Refurbishing Interconnector

[Close](#) [Download Template](#) [Create Exhibit](#)



**Exhibit A**

Form of Prequalification Certificate

Cancel

Preview Exhibit Form

Save

Submit Exhibit for Signatures

**Create New Exhibit A**

Form of Prequalification Certificate

Complete the information below in order to create your new exhibit.

**Exhibit Title**

MyExhibitTitle

**Company Name**

Lorem ipsum dolor sit amet

**Company Registration Number**

1234567890

**Company Address**

Company name

Address Line 1

Address Line 2

Address Line 3

City

Postcode

**Delivery Year**

XXXX



## My EMR / Exhibit Library

Display:  Exhibit Templates  Your Generated Exhibits

Filter CMU ID

Filter Exhibit Status

Filter Exhibit Name

Filter Company Name

- Display All -

- Display All -

- Display All -

- Display All -

Search for Exhibit Title



Exhibit Title ↓	Exhibit Name	Exhibit Status ↓	Exhibit Type ↓	CMU ID ↓	Company Name ↓	Expiry Date ↓	Actions
MyExhibitTitle	Exhibit A	<span>● Active</span>	Regular	n/a	Company Name spread over two lines	n/a	▼
MyExhibitTitle	Exhibit B	<span>● Awaiting Signature</span>	Regular	123456	Company Name spread over two lines	n/a	▼
MyExhibitTitle	Exhibit C	<span>● Awaiting Signature</span>	Evergreen	123456	Company Name spread over two lines	XX/XX/XXXX	▼
MyExhibitTitle	Exhibit D	<span>● Awaiting Signature</span>	Evergreen	123456	Company Name spread over two lines	XX/XX/XXXX	▼
MyExhibitTitle	Exhibit DA	<span>● Active</span>	Evergreen	123456	Company Name spread over two lines	XX/XX/XXXX	▼
MyExhibitTitle	Exhibit DB	<span>● Active</span>	Evergreen	123456	Company Name spread over two lines	XX/XX/XXXX	▼

View exhibit info

Preview exhibit form

Delete exhibit

# MyExhibitName

[Company Name]

[CMU ID]

● Awaiting Signature

**Exhibit Template**

Exhibit DC

**Description**

Alternative form of Joint Owner Declaration for Prospective Interconnector CMU

**Date Created**

XX/XX/XXXX

**Exhibit Type**

Evergreen

**Expiry Date**

XX/XX/XXXX

**Signatories**

In order to activate an exhibit you will need to collect the required signatories.

**Director/Owner signature**

Name Name Surname

XX/XX/XXXX, 13:54

**Director/Owner signature**

Awaiting Signature

**Applications**

A-T-1-2023-AB73WV-00001

A-T-1-2023-AB73WV-00002

A-T-1-2023-AB73WV-00003

A-T-1-2023-AB73WV-00004

Overview of Exhibit Information

## My EMR / Exhibit Library

Display:  Exhibit Templates  Your Generated Exhibits

Filter CMU ID

- Display All -

Filter Exhibit Status

- Display All -

Filter Exhibit Name

- Display All -

Filter Company Name

- Display All -

Search for Exhibit Title



Exhibit Title ↓

Exhibit Name

Exhibit Status

Warning - Deleting an Exhibit

Company Name ↓

Expiry Date ↓

Actions

MyExhibitName

Exhibit A

● Active

Deleting Exhibit [Exhibit Title] will remove it from your Exhibit library.  
If this is an Evergreen Exhibit, deleting it will mean it cannot be reused.

Please note this action cannot be undone.

Do you wish to continue?

Cancel

Delete this Exhibit

MyExhibitName

Exhibit B

● Active

MyExhibitName

Exhibit C

● Active

MyExhibitName

Exhibit D

● Active

MyExhibitName

Exhibit DA

● Active

Evergreen

123456

Company Name spread  
over two lines

XX/XX/XXXX

MyExhibitName

Exhibit DB

● Active

Evergreen

123456

Company Name spread  
over two lines

XX/XX/XXXX

## Company ABC / Create Application

<b>AB73WV</b>	<b>Status</b>	<b>Application ID</b>	<b>Applicant Company</b>
Refurbishing Interconnector	Created	A-T-1-2023-AB73WV-00001	Company ABC

Cancel

Save

Submit Application

Review Details

Applications Questions

Declarations

Emissions

### 01 Emissions

Please note that the options below have been provided as a result of your CMU entry. Please ensure your CMU Fossil Fuel selection by component is correct and/or if necessary update it, as an incorrect declaration may result in a failure.

#### Will not break FF Emission Limits

The Applicant makes the declaration required by Rule 3.4.11 that no components will exceed the Fossil Fuel Emissions Limit (FFEL) within the Delivery Year(s) or, where a component has a Commercial Production Start Date before 4 July 2019 and where the FFEL has been exceeded for that component that the Applicant commits to staying within the Fossil Fuel Yearly Emissions Limit for the relevant Delivery Year(s).

 I confirm

#### Upload Exhibit ZB

Please note that the relevant Agreement Management milestone for provision of the full Fossil Fuel Emissions Declaration (Exhibit ZB) where required is defined in Rule 8.3.11.

You can upload the Exhibit from your Exhibit Library, reuse a previously completed one and/or upload a completed Exhibit document.

[Open Exhibit Library](#)[Reuse Exhibit](#)[Upload Files](#)

The Reuse Exhibit option would not be applicable for Exhibits that are not Evergreen

Company ABC / Create Application

AB73WV

Refurbishing Interconnector

View of when  
uploading the  
electronically  
created Exhibit  
from the Exhibit  
Library

## Upload Exhibit from Library

Select the exhibits required for this application from the table below.

Exhibit Title	Exhibit Name	Exhibit Status	Expiry Date	Select
MyExhibitTitle	Exhibit D	● Active	XX/XX/XXXX	<input type="checkbox"/>
MyExhibitTitle	Exhibit D	● Active	XX/XX/XXXX	<input type="checkbox"/>
MyExhibitTitle	Exhibit D	● Active	XX/XX/XXXX	<input type="checkbox"/>
MyExhibitTitle	Exhibit D	● Active	XX/XX/XXXX	<input type="checkbox"/>
MyExhibitTitle	Exhibit D	● Active	XX/XX/XXXX	<input type="checkbox"/>

Cancel

Upload Exhibits

 I confirm

Submit Application

## Company ABC / Create Application

AB73WV

Refurbishing Interconnector

Status

Created

Application ID

A-T-1-2023-AB73WV-00001

Applicant Company

Company ABC

Cancel

Save

Submit Application

Review Details

Applications Questions

Declarations

Emissions

## 01 Emissions

Please note that the options below have been provided as a result of your CMU entry. Please ensure your CMU Fossil Fuel selection by component is correct and/or if necessary update it, as an incorrect declaration may result in a failure.

**Will not break FF Emission Limits**

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 I confirm**Upload Exhibit ZB**

Please note that the relevant Agreement Management milestone for provision of the full Fossil Fuel Emissions Declaration (Exhibit ZB) where required is defined in Rule 8.3.11. You can upload the Exhibit from your Exhibit Library, reuse a previously completed one or upload a completed Exhibit in PDF format.

Open Exhibit Library

Reuse Exhibit

Upload Files

**Successfully uploaded****Manual upload:** Exhibit\_form\_123\_v1[View](#) [Delete](#)**Exhibit Library:** Exhibit\_form\_123\_v1[View](#) [Delete](#)**Reused Exhibit:** Exhibit\_form\_123\_v1[View](#) [Delete](#)

The Reuse Exhibit option would not be applicable for Exhibits that are not Evergreen





## My EMR / My Applications &amp; Opt-Out Notifications

Filter Company

Filter Application Status

Filter CMU Type

- Display All -

- Display All -

- Display All -

Search CMU or Application ID



Status ↓	CMU ID ↓	Application ID ↓	CMU Type ↓	Company Name ↓	Date Updated	Updated By	More
● Created	AB73WV	A-T-1-2023-AB73WV-00001	123456	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	⋮
● Created	AB73WV	A-T-1-2023-AB73WV-00001	123456	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	⋮

View Exhibit Forms



## My EMR / My Applications &amp; Opt-Out Notifications / A-T-1-2023-AB73WV-00001 / Exhibit List

Filter Exhibit Status

- Display All -

Filter Exhibit Name

- Display All -

Search for Exhibit Title



Exhibit Title ↓	Exhibit Name ↓	Exhibit Status ↓	Exhibit Type ↓	Expiry Date ↓	Action
MyExhibitName	Exhibit A	● Active	Regular	n/a	<a href="#">View</a>
MyExhibitName	Exhibit B	● Active	Regular	n/a	<a href="#">View</a>
MyExhibitName	Exhibit DC	● Active	Evergreen	XX/XX/XXXX	<a href="#">View</a>

Any questions?

Please go to [sli.do](https://sli.do) and enter the event code **#141 7572** or raise your hand on the call.



In addition to feedback received today, we are keen to hear from you with any additional feedback via Email [box.newemr.itteam@nationalgrid.com](mailto:box.newemr.itteam@nationalgrid.com)

If you have any further views on the feature areas explored please contact me at [Richard.Griffiths@Nationalgrideso.com](mailto:Richard.Griffiths@Nationalgrideso.com)

We are happy to continue to engage with you further on the topics we discussed today and look forward to demonstrating the delivery of the requirements in the New Portal in future sessions.

### User Group Plan – next 6 months

Expected Scope	Requirements Playback	Familiarisation Demo
CMU Transfer, CANs, Credit Cover Management, Issue DSR Test letter and Certificate, Metering Test Certificate, Termination Notice, Total Project Spend, Planning Consents, Dispute Creation, Change of Location.	Completed	July
SPD, Extend and withdraw terminations, MCR, Construction Reports, Exhibit Digital Signature, ST entry application, Evergreen Exhibit, Exhibit Generation, Confirmation of Entry,	8 <sup>th</sup> June & Early July (Digital Signature)	September
Emissions ZB- ZA, Issue Final Termination, Dispute Results, PM/PT, SoS Changes, AI management, Bidding Group Management	Early July & Early August	November
Secondary Trade, Component Reallocation, Metering Information/ aggregation, CAN suspension, 2023 Regulatory Requirements (Prequal), Exhibit J Resubmit, EYC, MTC Invalidation, CAN termination dispute	Mid September & Early October	January 2024

# Continuing the Conversation

**Notes:** Some development items are broken down in to multiple development increments and will be played back and demonstrated at an appropriate time in the development process. The Delivery Body are working with the Electricity Settlements Company to review Metering related process options, which are likely to result in change in those processes.