Customer Requirement Playback
EMR Portal – 17th August 2023
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• New Portal Demonstration
  • CAN Release, EP Visibility & AACO update
  • CAN Termination Notice
• Q&A and Continuing the Conversation
We will be using Slido for questions and feedback in today's session. Please go to sli.do and enter the event code #1489652.

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 17/08/2023.
# Outstanding Feedback

<table>
<thead>
<tr>
<th>Date raised</th>
<th>Feature Area</th>
<th>Customer Comment</th>
<th>DB Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/12/2022</td>
<td>CMU Transfer</td>
<td>Why does the transferor need to provide certificates? they should already be there anyway as they currently hold the agreement?</td>
<td>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. Please note this change will also amend the need to upload the Exhibits during Secondary Trading.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Update 17th August: Based on current expectations, detailed requirement development will commence in September 2023.</td>
</tr>
<tr>
<td>15/03/2023</td>
<td>FCM Deadlines</td>
<td>On the new Outstanding Activities page how will the deadline for FCM be shown?</td>
<td>We are considering several options for this deadline currently and once the options available are clear we intend to bring those to this group for feedback. We expect Outstanding Activities to develop over time as it is used to manage agreements based on Capacity Provider feedback.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>This relates to the 11/12 month deadline that leads to a credit cover increase and a 16 month deadline that triggers the termination event.</em></td>
<td>Please see slide.</td>
</tr>
</tbody>
</table>
### Outstanding Feedback

<table>
<thead>
<tr>
<th>Date raised</th>
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<th>Customer Comment</th>
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</tr>
</thead>
</table>
| 06/07/2023      | Capacity Market Register   | Feedback received via Sli-do survey:  
1) Keen to see CMU ID and Applicant details at Component level to enable better filtering and analysis of the Capacity Market Register  
2) Interest in Delivery Year register alongside the main registers for easier visibility  
3) Consistency of the headers within the registers  
4) Interest in accessing register data via API or relational database format rather than CSV/XLS | We appreciate the feedback provided and have issued a survey to all Capacity Market customers to gain further insights. The survey will be open until 25th August. We will update this group in September.  
Updates on items raised in slido:  
1) Feedback noted, we will review this in combination with wider feedback and consider in overall CMR design.  
2) We are exploring the potential of having a Delivery Year register with our development team and will update in a future session  
3) We are reviewing options to implement a format that can be consistent across all registers.  
4) This will not be possible within our first implementation but will be considered as a potential future improvement. |
Context: For the Financial Commitment Milestone (FCM) on T-4 agreements the deadline is 16 months from Auction Results Day (ARD), not providing FCM by this date leads to a termination.

In addition to this requirement if the milestone has not been met after 11 months from ARD there is a requirement to post additional credit cover (at present an additional £5,000/MW) from 12 months after the ARD. Failure to post this additional credit cover within 15 working days from that point is a termination event.

You have asked how this will appear on the Outstanding Activities list in the new portal and we have been considering options with our development teams. The two options we have come to for the first release of the portal are below. For either option we will continue to send reminder emails and phone calls for both the 11 and 16 month deadline.

1. Show the 11 month date on Outstanding Activities and on the working day before the 11 month deadline change this date to the 16 month deadline (this is the Delivery Bodys recommendation)
2. Show only the 16 month deadline

We will be running a short slido poll to gauge your opinion on these options and asking for some context, equally as ever you are welcome to speak now or contact us after this session. Please know following the first release we will consider our approach to Outstanding Activities as part of our continuous improvement efforts.
### Outstanding Feedback – FCM deadlines

The dates on this screenshot are for demonstration purposes only and do not align with actual CM milestones.
2023 Regulatory Requirements (Prequalification)

Feature Description

Following the 2023 Regulatory Changes the Method used to calculate the Connection Capacity selection options have changed along with the need to provide information where the CMU Application is part of a Multi-Unit Site with a shared Connection Agreement. As a result, if you have a historic CMU migrated to the New EMR Portal, you might be required to update the Component information for that CMU before creating a new Application.

Customer Feedback Considered

- In the Legacy EMR Portal where the CMU has multiple Components there is no indication to show which Component needs to be updated based on the required new changes.
- There is no Portal validation in place to inform the Applicant they need to update their Component information before creating or submitting their Application.

High-level Requirements Proposed

- Some of the 2023 Regulatory Changes have already been developed in the New EMR Portal and shared in previous demonstrations i.e. Primary Fuel at Component, Primary Fuel of a Proven DSR On site Generating Unit with the associated Capacity.
- The Method of Calculation selection will be amended in line with the updated rules, and a Multi-Unit Site declaration will be implemented at Application level.
- When an External Participant tries to create an Application using a historic/migrated CMU they will be notified if there are Component fields that will need to be updated due to the 2023 Regulatory Changes.
- The changes can be updated in 2 ways; the EP User can go to the CMU & Components area and update the Component information. Or they can update the Component information from the Application creation screen.
- The following Component fields might need to be updated: Method used to calculate the Connection Capacity, Primary Fuel or Primary Fuel of the Proven DSR’s On site Generating Unit and Capacity of the Proven DSR’s On site Generating Unit (MW).
- There might be additional Component fields that would also need to be updated due to the changes made to the relevant field on the New Portal (i.e. Fossil Fuel Component Declaration and Commissioned Start Date).
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.

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Prequalification Auctions

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Year</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23 T-1 Capacity Auction</td>
<td>T-1</td>
<td>2023</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
<tr>
<td>2022-23 T-1</td>
<td>T-1</td>
<td>2023</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
</tbody>
</table>

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Secondary Trade Entrant

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Year</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23 T-1 Capacity Auction</td>
<td>T-1</td>
<td>2023</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
<tr>
<td>2022-23 T-1</td>
<td>T-1</td>
<td>2023</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
</tbody>
</table>
There are CMU(s) that require the Component information to be updated before an Application can be created using the relevant CMU.

<table>
<thead>
<tr>
<th>Status</th>
<th>CMU ID</th>
<th>CMU Name</th>
<th>CMU Type</th>
<th>Company Name</th>
<th>Components</th>
<th>Application Submitted</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Required</td>
<td>A873MV</td>
<td>A873MV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>A873MV</td>
<td>A873MV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>A873MV</td>
<td>A873MV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
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<td></td>
</tr>
<tr>
<td>Created</td>
<td>A873MV</td>
<td>A873MV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Options for actions:
- Update Component
- Manage CMU
- Manage Component
- Delete CMU

ESO
CMU Component Updates

These historic CMU Components will need to be updated before you can create an Application using the relevant CMU.

Component ID 123456789

Methods Used to Calculate the Connection Capacity
This is used to capture the calculation method regarding the Connection Capacity. Please note, due to the Prequalification 2023 regulatory changes the calculation methods available for selection have been updated, therefore this field may not reflect historic selections.

Select an Option

Primary Fuel
Please select the relevant Primary Fuel Type for this component.

Select an Option

Fossil Fuel Component Declaration
CMU Management / AB73WV / CMU Component Updates

AB73WV
Existing Generating

Status
Update Required

Application
Component Update

Warning - Updates Remaining

By continuing with saving the relevant updates, this will save the changes you have made thus far. However, there are still some Component field(s) that have yet to be updated, therefore this CMU cannot be used to create an Application until all of the relevant updates are made.

Select 'Cancel' to continue with the updates or make changes to the updates you already made. Select 'Save Updates' and update the remaining Component field(s) at a later date.

Please note you will not be able to edit the Component fields already updated after selecting 'Save Updates'.

Primary Fuel

Please select the relevant Fuel for this component:

Select an Option

Fossil Fuel Component Declaration
You have successfully updated XX out of XX Components for CMU XXXXXX. Complete all of the Component updates in order to be able to use the CMU in an Application.

There are new updates that need to be made to your CMUs to allow for their use in auctions.

<table>
<thead>
<tr>
<th>Status</th>
<th>CMU ID</th>
<th>CMU Name</th>
<th>CMU Type</th>
<th>Company Name Spread over two lines</th>
<th>Components</th>
<th>App</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Required</td>
<td>AB73WV</td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>AB73WV</td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>AB73WV</td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>AB73WV</td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Update Component**
- **Manage CMU**
- **Delete CMU**
<table>
<thead>
<tr>
<th>CMU Management / AB73WV / CMU Component Updates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AB73WV</strong></td>
</tr>
<tr>
<td>Existing Generating</td>
</tr>
</tbody>
</table>

Submit Updates

Are you sure you want to submit these updates? Once submitted you will not be able to edit the Component fields again. Select 'Cancel' if you wish to make changes to the Component fields.

Calculation method regarding the Connection Capacity:
Select an Option

Primary Fuel
Please select the relevant Fuel for this component.
<table>
<thead>
<tr>
<th>Status</th>
<th>CMU ID</th>
<th>CMU Name</th>
<th>CMU Type</th>
<th>Company Name</th>
<th>Components</th>
<th>Application Submitted</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>AB73WV</td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>AB73WV</td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>AB73WV</td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>AB73WV</td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td>False</td>
<td></td>
</tr>
<tr>
<td>CMU ID</td>
<td>CMU Name</td>
<td>CMU Type</td>
<td>Company Name</td>
<td>Components</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------</td>
<td>------------------------</td>
<td>------------------------</td>
<td>-------------------------------------------------</td>
<td>------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AB73WV</td>
<td>A-T-1-2023-AB73WV-00001</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AB73WV</td>
<td>A-T-1-2023-AB73WV-00001</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## My EMR / AB73WV / CMU Component Updates

<table>
<thead>
<tr>
<th>AB73WV</th>
<th>Status</th>
<th>Applicant Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Generating</td>
<td>Update Required</td>
<td>Company Name long long name</td>
</tr>
</tbody>
</table>

### CMU Component Updates

These historic CMU Components will need to be updated before you can create an Application using the relevant CMU.

### Component ID 123456789

**Methods Used to Calculate the Connection Capacity**

This is used to capture the calculation method regarding the Connection Capacity. Please note, due to the Prequalification 2023 regulatory changes the calculation methods available for selection have been updated, therefore this field may not reflect historic selections.

Select an Option

**Primary Fuel**

Please select the relevant Primary Fuel Type for this component.

Select an Option

**Fossil Fuel Component Declaration**
<table>
<thead>
<tr>
<th>AB73WV</th>
<th>Status</th>
<th>Applicant Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Generating</td>
<td>Update Required</td>
<td>Company Name long long name</td>
</tr>
</tbody>
</table>

### Submit Updates

Are you sure you want to submit these updates? Once submitted you will not be able to edit the Component fields again. Select ‘Cancel’ if you wish to make changes to the Component fields.

**Calculation Method regarding the Connection Capacity:**

Select an Option

**Primary Fuel**

Please select the relevant Fuel for this component.
<table>
<thead>
<tr>
<th>CMU ID</th>
<th>CMU Name</th>
<th>CMU Type</th>
<th>Company Name</th>
<th>Components</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ AB73WV</td>
<td>A-T-1-2023-AB73WV-90001</td>
<td>Proven DSR</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>AB73WV</td>
<td>Existing Generating</td>
<td>Company Name Spread over two lines</td>
<td>6</td>
</tr>
</tbody>
</table>
Multi-Unit Site
Is this CMU part of a multi-unit site with a shared Connection Agreement?
- Yes
- No

Total Site Capacity
Provide the Total Site Capacity as stated on the Connection Agreement

Included CMUs
List the other CMUs included in the shared Connection Agreement
Digital Signature

Feature Description

Applicants require the ability to send a Exhibits, that have been completed through the Exhibit Generation process, for digital signature. This allows the e-signature to be efficiently applied, tracked and saved to an Exhibit in the Document Library.

Customer Feedback Considered

- Simpler process to enable digital signatures to be added with a tracking mechanism to display status of all outstanding.

High-level Requirements Proposed

- Integrate the Digital Signature process into the Exhibit Generation process
- The number of signatories can be tailored to the requirements of the applicant
- Allow Applicants to determine the order that signatories will be able to sign
- Use SMS verification for signatories to ensure security of the document is maintained
- The signatory has the option to cancel the process if they are not happy with the Exhibit content and give a reason why
- The initiator has the option to withdraw the Exhibit from the signature process, allowing the Exhibit to be edited before resubmission
- The status of each signature can been seen within the Exhibit information screen
- There will be a limitation on Day 1, that affects applicants who require the same signatory to sign an Exhibit twice. This will require manual signature and upload.
Create New Exhibit B

Form of Applicant Declaration

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

Exhibit Title

MyExhibitTitle

Application Year

This is an Evergreen Exhibit and can be listed up to 4 Years following a Successful Application.

XXXX

Party A

This is the Legal Owner of each Generating Unit comprised in the Relevant CMIU.

XXXX

Party B

This is the Applicant Company which has Dispatch Control with respect to each Generating Unit comprised in the Relevant CMIU.

Lorem ipsum dolor sit amet

CMIU ID

XXXXXXXX

Legal Owner Company – Single/Multiple Director(s)

Does the Legal Owner Company have a single active Director(s) or multiple active Directors?

- Single director
- Multiple directors

Dispatcher Controller Company – Single/Multiple Director(s)

Does the Dispatcher Controller Company have a single active Director(s) or multiple active Directors?

- Single director
- Multiple directors
## Define Authorised Signer

Set the Authorised Signers for the Exhibit.

### Signing Order

- Do you want to send the Exhibit for signatures in sequence or in order? Signing Order will be as per the signer details specified below.
- Yes
- No

### Director/Officer(s) Details

<table>
<thead>
<tr>
<th>First Name</th>
<th>Enter First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname</td>
<td>Enter Surname</td>
</tr>
<tr>
<td>Email Address</td>
<td>Enter Email Address</td>
</tr>
<tr>
<td>Phone</td>
<td>XX-XXXX-XXXXX</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First Name</th>
<th>Enter First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname</td>
<td>Enter Surname</td>
</tr>
<tr>
<td>Email Address</td>
<td>Enter Email Address</td>
</tr>
<tr>
<td>Phone</td>
<td>XX-XXXX-XXXXX</td>
</tr>
</tbody>
</table>

### Independent Witness Details

<table>
<thead>
<tr>
<th>First Name</th>
<th>Enter First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname</td>
<td>Enter Surname</td>
</tr>
<tr>
<td>Email Address</td>
<td>Enter Email Address</td>
</tr>
<tr>
<td>Phone</td>
<td>XX-XXXX-XXXXX</td>
</tr>
</tbody>
</table>
Email notification for signatories

Email notification for initiator
By clicking “I Agree”, you agree that you have reviewed the Electronic Record and Signature Disclosure, and you consent to the use of electronic records and signatures in the review and execution of this document.
Exhibit ZA Test Document

Signature

Full Name1:
Gopal

Date1:
24/07/2023

Comments1:
Comments
Cancel Transaction

* Are you sure you want to cancel this transaction? Provide your reasons for cancelling the transaction below.

Changes are need for ZA Exhibit. Emission details are incorrect

[Buttons: No, do not cancel it, Yes, cancel it]
Email notification completed signature

Email notification for a cancelled transaction
<table>
<thead>
<tr>
<th>Exhibit Title</th>
<th>Exhibit Name</th>
<th>Exhibit Status</th>
<th>Exhibit Type</th>
<th>CMU ID</th>
<th>Company Name</th>
<th>Expiry Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>MyExhibitTitle</td>
<td>Exhibit A</td>
<td>Active</td>
<td>Regular</td>
<td>n/a</td>
<td>Company Name spread over two lines</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>MyExhibitTitle</td>
<td>Exhibit B</td>
<td>Awaiting Signature</td>
<td>Regular</td>
<td>123456</td>
<td>Company Name spread over two lines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MyExhibitTitle</td>
<td>Exhibit C</td>
<td>Awaiting Signature</td>
<td>Evergreen</td>
<td>123456</td>
<td>Company Name spread over two lines</td>
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<td></td>
</tr>
<tr>
<td>MyExhibitTitle</td>
<td>Exhibit D</td>
<td>Awaiting Signature</td>
<td>Evergreen</td>
<td>123456</td>
<td>Company Name spread over two lines</td>
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<td></td>
</tr>
<tr>
<td>MyExhibitTitle</td>
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</tr>
<tr>
<td>MyExhibitTitle</td>
<td>Exhibit DC</td>
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</tr>
<tr>
<td><strong>Exhibit Template</strong></td>
<td>Exhibit DC</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>----------------------</td>
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<td></td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Alternative form of Joint Owner Declaration for Prospective Interconnector CMU XX/XXX/XXXX</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Date Created</strong></td>
<td>XX/XXX/XXXX</td>
<td></td>
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<tr>
<td><strong>Exhibit Type</strong></td>
<td>Evergreen</td>
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</tr>
<tr>
<td><strong>Expiry Date</strong></td>
<td>XX/XXX/XXXX</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th><strong>Signer 1</strong></th>
<th>Name Name Surname (XX/XXX, 13:54)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Signer 2</strong></td>
<td>Name Name Surname (Awaiting Signature)</td>
</tr>
<tr>
<td><strong>Signer 3</strong></td>
<td>Name Name Surname (Not Sent)</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit</td>
</tr>
<tr>
<td><strong>Applications</strong></td>
<td>A-T-1-2023-AB73VW-00001</td>
</tr>
<tr>
<td></td>
<td>A-T-1-2023-AB73VW-00002</td>
</tr>
<tr>
<td></td>
<td>A-T-1-2023-AB73VW-00003</td>
</tr>
<tr>
<td></td>
<td>A-T-1-2023-AB73VW-00004</td>
</tr>
</tbody>
</table>
My EMR / Exhibit Library / Signature Status

Exhibit A
Form of Prequalification Certificate

Status of Exhibit Signature
Below is the current status of Exhibit signature.

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

<table>
<thead>
<tr>
<th>Signer</th>
<th>Name Surname (XX/XX/YYYY, 13:54)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signer 1</td>
<td>Name Surname (Awaiting Signature)</td>
</tr>
<tr>
<td>Signer 3</td>
<td>Name Surname (Not Sent)</td>
</tr>
</tbody>
</table>

Withdrawal Comments
Please provide your comments before withdrawing exhibit from signature
Warning - Withdraw Signature

Are you sure you wish to withdraw Exhibit from signature?

Withdrawal Comments

Please provide your comments before withdrawing exhibit from signature
**Funding Declaration (Exhibit J) Update**

**Feature Description**

Under CM Rule 8.3.8 Capacity Providers with Prospective CMUs are obligated to inform the Delivery Body of any changes to their Funding positions following an initial Funding Declaration (Exhibit J) as a part of their FCM submission. This update takes the form of a new Exhibit J signed by directors declaring any Relevant Benefit or Relevant Expenditure. This feature caters for the receipt of those documents.

**Customer Feedback Considered**

- Funding updates are very rare at present so limited feedback has been received
- Navigation has been improved from the current portal, at present these submissions are via ‘Other Documents’
- More robust data sharing with EMRS has been included to ensure any changes that impact payment continue to happen in a timely manner
- File upload improvements have been implemented as standard in the new portal

**High-level Requirements Proposed**

- Users can submit updated Funding Declarations through Management Activities
- Once submitted the declaration is reviewed by the Delivery Body and in the event of a rejection these details are available through Delivery Body Comments
- Supplementary information can be included in the submission if desired to explain any complexities in the changes to funding
- Data sharing improvements have been implemented, though these are not visible to the external users.
- File upload is based on the new drag and drop or click to upload views as is standard in the new portal
Section name 1

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

Section name 2

Body copy to be placed in here. Body copy to be placed in here. Body copy to be placed in here.
### My EMR / Management Activities / Funding Declaration Update

<table>
<thead>
<tr>
<th>Application ID</th>
<th>CAN ID</th>
<th>CMU ID</th>
<th>Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXXXXXXXXX</td>
<td>XXXXXXXXXXXXXXX</td>
<td>XXXXXXX</td>
<td>Company Name long long name</td>
</tr>
<tr>
<td>XXXXXXXXXXXXXXX</td>
<td>XXXXXXXXXXXXXXX</td>
<td>XXXXXXX</td>
<td>Company Name long long name</td>
</tr>
<tr>
<td>XXXXXXXXXXXXXXX</td>
<td>XXXXXXXXXXXXXXX</td>
<td>XXXXXXX</td>
<td>Company Name long long name</td>
</tr>
<tr>
<td>XXXXXXXXXXXXXXX</td>
<td>XXXXXXXXXXXXXXX</td>
<td>XXXXXXX</td>
<td>Company Name long long name</td>
</tr>
</tbody>
</table>

**Filter CMU Type**
- Display All

**Filter Company**
- Display All

Search for Application ID, CAN ID or CMU ID
Funding Declaration Update
Submit Your Funding Declaration (Exhibit J) Document(s)

Supplementary Information
Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Funding Declaration Update (Exhibit J)
Please upload the updated Exhibit J showing your latest funding position as per Rule 6.3.6 below and provide any supplementary information that may assist with the delivery body assessment.
The following filetypes are accepted: .JPG, .PDF, .PNG, max 2GB

Upload Files or Drag Files
### My EMR / Outstanding Activities

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Requirement</th>
<th>Company Name</th>
<th>CMU ID</th>
<th>Application ID</th>
<th>Agreement ID</th>
<th>Submission Status</th>
<th>Delivery B.o.</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding Declaration Update</td>
<td>- Display All -</td>
<td>Spread over two lines</td>
<td>123456</td>
<td>T-3-2026-123456-0001 T-X-20XX-XXXXX-XXXX</td>
<td>Submitted for Review</td>
<td>First 25 characters...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Extended Years Criteria

Feature Description

Extended Years Criteria (EYC) updates are required under CM Rule 8.3.6A for Prospective Generator CMUs with agreements over 3 years in duration. The milestone requires the submission of an Independent Technical Expert (ITE) report confirming that the criteria have been met ahead of the deadline. It can result in a reduction notice being issued against the agreement and ultimately a reduction in the agreement length.

Customer Feedback Considered

- Easy navigation and milestone tracking
- Single submissions for multiple milestones (SCM, EYS and TPS) would reduce administrative time
- Clear sight of milestone tracking

High-level Requirements Proposed

- Capacity Providers can track their EYC requirement under Outstanding Activities, including any comments from the Delivery Body
- Completed submissions can be viewed under 'Completed Activities'
- In the first release milestones must be submitted individually. We are actively looking into similar functionality to the Metering Test Certificate discussed previously that would allow for a single document to meet multiple milestones.
- Standard file upload and management functionality as per the new portal
<table>
<thead>
<tr>
<th>Due Date</th>
<th>Requirement</th>
<th>Company Name</th>
<th>CMU ID</th>
<th>Application ID</th>
<th>Agreement ID</th>
<th>Submission Status</th>
<th>Delivery Box</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>XX/XXXXXX</td>
<td>Submit Extended</td>
<td>Company Name Spread over</td>
<td>123456</td>
<td>T-0-2026-123456-0001</td>
<td>T-K-20XX-XXXXXX01-XXXXX</td>
<td>Outstanding Activities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### My EMR / Outstanding Activities / Submit Extended Years Criteria

<table>
<thead>
<tr>
<th>Applicant Company</th>
<th>CMU ID</th>
<th>Application ID</th>
<th>Agreement ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>123456</td>
<td>T-3-2026-123456-0001</td>
<td>T-X-20XX-XXXXXX-XXXXX</td>
</tr>
</tbody>
</table>

#### Extended Years Criteria (EYC)

**Submit Your Extended Years Criteria (EYC) Documents**

Please upload the Independent Technical Expert (ITE) report confirming that the ITE is satisfied the CMU meets the Extended Years Criteria as per 8.3.8A.

The following file types are accepted: .JPG, .PDF, .PNG, max 20MB

[Upload Files or Drop Files]

Successfully uploaded

[file name: PDF]  
[View]  [Delete]
You have successfully submitted your Extended Years Criteria request.

<table>
<thead>
<tr>
<th>Filter Auction</th>
<th>Filter Company</th>
<th>Filter Submission Status</th>
<th>Filter Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Submit Total Project Spend</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Search CMU or Application ID</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Requirement</th>
<th>Company Name</th>
<th>CMU ID</th>
<th>Application ID</th>
<th>Agreement ID</th>
<th>Submission Status</th>
<th>Delivery Bo.</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>XX/XX/XXX</td>
<td>Submit Extended Year Criteria</td>
<td>Spread over two lines</td>
<td>123456</td>
<td>T-3-2026-123456-0001 T-X-20XX-XX0XX-XXX0X</td>
<td>Submitted</td>
<td>First 25 characters...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Emissions Related Material Change (ERMC)

Feature Description

An Emissions Related Material Change (ERMC) is the term used to describe amendments made to a CMU, or Components over 1MW within a CMU, which has an impact on the Emissions status. The result of an ERMC is the requirement for the Capacity Provider to submit a new or updated Fossil Fuel Emissions Declaration (Exhibit ZA) within the relevant timescales. For Capacity Providers who were successful in receiving an Agreement from the Auctions held in 2022 there is also an obligation to notify and provide certain information to the Delivery Body regarding the ERMC within 2 months. These obligations are committed to during the Prequalification process.

Customer Feedback Considered

- Ease of navigation – the current portal makes it too difficult to find different obligations
- Clearer tracking for agreement milestone obligations

High-level Requirements Proposed

- An Activity will be available under ‘Management Activities’ to allow Capacity Providers to inform the Delivery Body of their ERMC.
- Once reviewed and approved by the Delivery Body, the ‘due date’ for the subsequent submission of a new/updated Exhibit ZA will be based on CMU type, Auction type, Emissions calculation and Rules applicable depending upon whether the Agreement was acquired before or after Amendments made in 2021. This subsequent date driven activity will be held in ‘Outstanding Activities’.
- Where deadlines for Prospective CMU types have an obligation that is based on Agreement Start date, the ‘due date’ displayed will show the earliest potential date. (The Delivery Body will use business process to monitor and amend ‘due dates’ based on individual scenarios and communicate with Capacity Providers to manage expectations.
- This features provides the option of uploading Exhibit ZA via the Exhibit Generator tool and the User will be able to view the document once it has been uploaded.
## My EMR / Management Activities

### Section name 1

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

<table>
<thead>
<tr>
<th>Change of Address</th>
<th>Security Interest</th>
<th>CMU Transfer</th>
<th>ERMC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</td>
<td>Emissions Related Material Change</td>
</tr>
</tbody>
</table>

### Section name 2

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

<table>
<thead>
<tr>
<th>Change of Address</th>
<th>Security Interest</th>
<th>CMU Transfer</th>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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*ESO*
<table>
<thead>
<tr>
<th>CMU ID</th>
<th>CMU Name</th>
<th>CMU Type</th>
<th>Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>A873WV</td>
<td>Preston North Upgraded Power Station</td>
<td>Lorem ipsum dolor sit amet, consectetur</td>
<td>Company Name long long name</td>
</tr>
<tr>
<td>123456</td>
<td>Preston North Upgraded Power Station</td>
<td>Lorem ipsum dolor sit amet, consectetur</td>
<td>Company Name long long name</td>
</tr>
<tr>
<td>123456</td>
<td>Preston North Upgraded Power Station</td>
<td>Lorem ipsum dolor sit amet, consectetur</td>
<td>Company Name long long name</td>
</tr>
<tr>
<td>123456</td>
<td>Preston North Upgraded Power Station</td>
<td>Lorem ipsum dolor sit amet, consectetur</td>
<td>Company Name long long name</td>
</tr>
</tbody>
</table>
Confirmation of Emission Related Material Change

By providing the relevant information below the capacity provider is making the confirmation of an Emissions Related Material Change (as defined in CM Rule 1.2) required by CM Rule 8.3.12(b) or 8.3.13(b)(ba).

**ERMC Date Occurred**

Please enter the date when emissions related change occurred.

DD/MM/YYYY

**Declaration of Necessity to use Tech-Specific Fossil Fuel Formula(e)**

Declaration of necessity to apply either the Fossil Fuel Emissions CCUs Formula, Fossil Fuel Emissions Mixed Fuels Formula, Fossil Fuel Emissions Composite Formula to determine Emissions and/or apply the Design Efficiency CHPQA Formula to determine Design Efficiency.

The Capacity Provider confirms this is required in order to maintain compliance with the confirmation made at prequalification in Rule 3.4.11 and also that the Exhibit ZA will be provided at a later date due to not yet having the required period of data.

Please identify the Formulae to be applied. Leave blank if none are required and the standard Fossil Fuel Emissions Formula will be applied.

- CCUS
- CHP
- Mixed Fuels
Fossil Fuel Component Declaration

Please select the relevant component to indicate Emission Related Material Change. By ticking this box the applicant declares that this is a Fossil Fuel Component. Components which are being assessed for Emission Related Material Change will not be available for selection. Please indicate if the Production Commission Start Date for each component where there has been an ERMC is Pre or Post 4th July 2018.

<table>
<thead>
<tr>
<th>Component ID</th>
<th>Submission status</th>
<th>Fossil Fuel Component Declaration</th>
<th>Production Commissioned Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXXXXXXXXXXXXXXX</td>
<td>Not Submitted</td>
<td></td>
<td>Commission Start Date Pre 4th July 2019</td>
</tr>
<tr>
<td>XXXXXXXXXXXXXXXXXXXXX</td>
<td>Submitted</td>
<td></td>
<td>Commission Start Date Pre 4th July 2019</td>
</tr>
<tr>
<td>XXXXXXXXXXXXXXXXXXXXX</td>
<td>Submitted</td>
<td>✓</td>
<td>Commission Start Date Pre 4th July 2019</td>
</tr>
<tr>
<td>XXXXXXXXXXXXXXXXXXXXX</td>
<td>Not Submitted</td>
<td></td>
<td>Commission Start Date Post 4th July 2019</td>
</tr>
<tr>
<td>XXXXXXXXXXXXXXXXXXXXX</td>
<td>Not Submitted</td>
<td>✓</td>
<td>Commission Start Date Post 4th July 2019</td>
</tr>
</tbody>
</table>

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Component ID: XXXXXXXXXXXXXXXXXXXXX
Submission status: Not Submitted
Fossil Fuel Component Declaration: No
Production Commissioned Start Date: Pre 4th July 2019

Component ID: XXXXXXXXXXXXXXXXXXXXX
Submission status: Submitted
Fossil Fuel Component Declaration: Yes
Production Commissioned Start Date: Pre 4th July 2019

Component ID: XXXXXXXXXXXXXXXXXXXXX
Submission status: Submitted
Fossil Fuel Component Declaration: Yes
Production Commissioned Start Date: Pre 4th July 2019

Component ID: XXXXXXXXXXXXXXXXXXXXX
Submission status: Not Submitted
Fossil Fuel Component Declaration: No
Production Commissioned Start Date: Post 4th July 2019

Component ID: XXXXXXXXXXXXXXXXXXXXX
Submission status: Not Submitted
Fossil Fuel Component Declaration: Yes
Production Commissioned Start Date: Post 4th July 2019

---

Sli.do #1489652
You have successfully submitted your Emissions Related Material Change request.

<table>
<thead>
<tr>
<th>Emissions Related Material Change</th>
<th>Company Name Spread over two lines</th>
<th>CMU ID</th>
<th>Application ID</th>
<th>Agreement ID</th>
<th>Submission Status</th>
<th>Delivery Bo.</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456</td>
<td>T-3-2026-123456-0001 T-X-20XX-XXXXXX-XXXX</td>
<td>Submitted</td>
<td>First 25 characters...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td>Requirement</td>
<td>Company Name</td>
<td>CMU ID</td>
<td>Application ID</td>
<td>Agreement ID</td>
<td>Submission Status</td>
<td>Delivery Body</td>
</tr>
<tr>
<td>----------</td>
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<td>----------------</td>
<td>--------------</td>
<td>------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>XX/XX/XXXX</td>
<td>Submit ZA Emission Declaration</td>
<td>Company Name Spread over two lines</td>
<td>123456</td>
<td>T-3-2026-123456-0001 T-X-20XX-XXXXX-XXXX</td>
<td>Resubmission for Re...</td>
<td>First 25 characters...</td>
<td>Manage Submission</td>
</tr>
<tr>
<td>XX/XX/XXXX</td>
<td>Submit ZA Emission Declaration</td>
<td>Company Name Spread over two lines</td>
<td>123456</td>
<td>T-3-2026-123456-0001 T-X-20XX-XXXXX-XXXX</td>
<td>Resubmission for Re...</td>
<td>First 25 characters...</td>
<td></td>
</tr>
<tr>
<td>XX/XX/XXXX</td>
<td>Submit ZA Emission Declaration</td>
<td>Company Name Spread over two lines</td>
<td>123456</td>
<td>T-3-2026-123456-0001 T-X-20XX-XXXXX-XXXX</td>
<td>Resubmission for Re...</td>
<td>First 25 characters...</td>
<td></td>
</tr>
<tr>
<td>XX/XX/XXXX</td>
<td>Submit ZA Emission Declaration</td>
<td>Company Name Spread over two lines</td>
<td>123456</td>
<td>T-3-2026-123456-0001 T-X-20XX-XXXXX-XXXX</td>
<td>Resubmission for Re...</td>
<td>First 25 characters...</td>
<td></td>
</tr>
</tbody>
</table>
Submit ZA Emissions Declaration

Upload Exhibit ZA and supporting evidence.

Submit ZA Emissions Declaration

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

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

Open Exhibit Library  Upload Files

Submit ZA Emissions Supporting Documents

Please provide any supporting documents for ZA Emissions Declaration

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

Upload Files or Drop Files
Submit ZA Emissions Declaration

Upload Exhibit ZA and supporting evidence.

Submit ZA Emissions Declaration

Please note that the relevant Agreement Management milestone for provision of the full Fossil Fuel Emissions Declaration (Exhibit ZA) where required is defined in 8.3.1.

The following filetypes are accepted: JPG, PDF, PNG, XLS, max 20b.

[File name, PDF]

Submit ZA Emissions Supporting Documents

Please provide any supporting documents for ZA Emissions Declaration

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

[File name, PDF]

[File name, PDF]
### My EMR / Outstanding Activities

<table>
<thead>
<tr>
<th>Filter Auction</th>
<th>Filter Company</th>
<th>Filter Submission Status</th>
<th>Filter Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Display All -</td>
<td>- Display All -</td>
<td>- Display All -</td>
<td>Submit Total Project Spend</td>
</tr>
<tr>
<td>Search CMU or Application ID</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Duo Data

- **Due Date:** 
  - XX/XX/YYYY

- **Requirement:**
  - SubmitZA Emission Declaration

- **Company Name:**
  - Spread over two lines

- **CMUID:**
  - 123456

- **Application ID:**
  - T-3-2025-123456-0001

- **Agreement ID:**
  - T-K-20XX-X00XXX-X00XXX

- **Submission Status:**
  - Submitted

- **First 25 characters:**
  - First 25 characters...
## Extended Performance

### Feature Description

A Capacity Committed CMU with a Storage Generating Technology Class that was awarded a Multi-year Capacity Agreement after 21 December 2017 needs to demonstrate extended performance during at least one Satisfactory Performance Day in the Winter of the first Delivery Year, and then once every three years. For single year Capacity Agreements, the requirement of testing in the first Delivery Year would apply to each new Capacity Agreement.

### Customer Feedback Considered

- Continuation of the new improved process whereby the Electricity Settlement Company (ESC) publish a EP 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 (in applicable Capacity Year).
- The EMR DB will incorporate the successful introduction of the EP Pass Report and upload into the New Portal which will automatically close matching outstanding tasks.
- Standard automatic email notification following EMR DB approval or rejection.
- The intention is to amend due date against the Extended Performance task to the 31st July for those CMUs which have not met the EP 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 the following feature, CAN Suspension.
**CMU and Auction Management**

- **Company CMUs**: A complete list of all company CMUs that can be something something something.

- **Exhibit Library**: All the Exhibits you 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**

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Year</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23 T-1 Capacity Auction</td>
<td>T-1</td>
<td>2023</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-1</td>
<td>2023</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
</tbody>
</table>

**Secondary Trade Entrant**

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Year</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23 T-1 Capacity Auction</td>
<td>T-1</td>
<td>2023</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
<tr>
<td>[Title]</td>
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<tr>
<td>[Title]</td>
<td>T-4</td>
<td>2027</td>
<td>Apply</td>
</tr>
</tbody>
</table>
### Attachments

**Submit Extended Performance**

Please enter below details to demonstrate Extended Performance as per CM Rule 13.4A.

**Extended Performance Date**

Please enter Satisfactory Performance Date in which Extended Performance will be demonstrated.

DD/MM/YYYY

**Settlement Period**

Please select from the drop down menu the period that Extended Performance will be demonstrated. Please make sure that it is equal to the Storage Generating Technology Class duration.

- From
- To

**Other Information**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim...
<table>
<thead>
<tr>
<th>Due Date</th>
<th>Requirement</th>
<th>Company Name</th>
<th>CMU ID</th>
<th>Application ID</th>
<th>Agreement ID</th>
<th>Submission Status</th>
<th>Action</th>
</tr>
</thead>
</table>
| XX/XX/XXXX | Submit Extended Performance | Company Name
Spend over two lines | 123456 | T-3-2026-123456-0001 | T-X-XX-XXXXX-XXXX | Submitted for Review | First 25 characters... |
**CAN Suspension**

**Feature Description**

If, for any reason, the SPD or EP obligations are not achieved by the 1\textsuperscript{st} May of the Delivery Year, the DB will suspend the Capacity Agreement. If the SPDs are submitted close to the 30\textsuperscript{th} April deadline, the CMU will still be suspended until the Delivery Body has reviewed the data. When the data is reviewed and providing that the SPDs pass, the full suspension will be removed and there will be no effect on payments. If the SPDs fail, the suspension will remain. The SPD requirement to submit dates between 1 May and 31 July will then be required. The suspension or repayment of Capacity Payments for the relevant CMU will be updated on the CMR within 5 working days as per Rule 7.5.1(q).

**Customer Feedback Considered**

- Ease of navigation – the current portal makes it too difficult to find different obligations
- Enable easier checking of CANs

**High-level Requirements Proposed**

- CAN status under ‘My Agreements’ will be automatically updated following 2\textsuperscript{nd} stage approval of suspension.
- Email notification following EMR DB approval of Capacity Agreement suspension.
- The original SPD task in Outstanding Activities will be reset and modified so that Capacity Providers can resubmit further Satisfactory Performance dates with appropriate helper text indicating additional dates. Please note, there will be a manual process carried out by EMR DB which will amend the status of the task from ‘Approved’ to ‘Submission Outstanding’ and change the ‘due date’ – minimum impact on customer experience expected)
- Standard automatic email notification following EMR DB approval (for the extended period, i.e 1 May and 31 July). No rejection email will be sent as this will form part of the Termination process.
For Capacity Agreements awarded prior to December 2017.
For Capacity Agreements awarded post December 2017.
Any questions?

Please go to sli.do and enter the event code #1489652 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

If you have any further views on the feature areas explored please contact me at 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

<table>
<thead>
<tr>
<th>Expected Scope</th>
<th>Requirements Playback</th>
<th>Familiarisation Demo</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>Completed</td>
<td>July 13th &amp; August 17th</td>
</tr>
<tr>
<td>SPD, Extend and withdraw terminations, MCR, Construction Reports, Exhibit ST entry application, Evergreen Exhibit, Exhibit Generation, Confirmation of Entry, Secondary Trade Transferor</td>
<td>Completed</td>
<td>October</td>
</tr>
<tr>
<td>Secondary Trade Approval, Component Reallocation, Metering Information/ aggregation, CAN suspension, , Exhibit J Resubmit, EYC, MTC Invalidation, CAN termination dispute AI management, Bidding Group Management, CMU Bulk Uploads, Volume Reallocation Registration, Integrated Guidance.</td>
<td>Mid September &amp; Mid-October</td>
<td>January 2024 / February 2024</td>
</tr>
</tbody>
</table>

Notes: Some development items are broken down into 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.