Customer Requirement Playback

EMR Portal – 17th August 2023

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- Q&A and Continuing the Conversation

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 **#1489652.**

If you would like to ask any questions ahead of the session please either send them in by email or use <u>this link</u> to ask them on Slido, the event code will only work on 17/08/2023



Outstanding Feedback

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?	 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. Update 17th August: Based on current expectations, detailed requirement development will commence in September 2023.
15/03/2023 FCM Deadlines	On the new Outstanding Activities page how will the deadline for FCM be shown? 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.	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. Please see slide.

Outstanding Feedback

Date raised Feature Area	Customer Comment	DB Response
06/07/2023 Capacity Market Register	 Keen to see CMU ID and Applicant details 	-

Outstanding Feedback – FCM deadlines

Sli.do #1489652

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

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My EMR	User Manage	ment Compar	y Management	CMUs & Cor	mponents Dis	pute					na	itional gr	idESO Electricity Mark	et Reform	₿
Outstanding	Activities				Outs	tanding Ac	ctiviti	ies Accep	otable Transferee Re	equireme	ent 🔿 Cor	npleted Activ	vities 🔀 Download C	SV	
										Sear	rch CMU ID, A	pplication IE) or Agreement ID		Q
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28 Jul 2023	Subn	nit Planning Cons	EMR Demo Con	ipany CR	EDC1	A-T-4	1-203	31-CREDC1			Submission	Outstandin	9		11
28 Jul 2023	Pre A	uction Activities	EMR Demo Con	ipany CR	EDC2	A-T-4	1-203	31-CREDC2			Submission	Outstandin	9		
2 Sept 2023	Subn	nit FCM	EMR Demo Con	ipany FAF	RNB1	A-T-1	-202	25-FARNB1-0			Submitted f	or Review			
2 Sept 2023	Subn	nit FCM	EMR Demo Con	ipany TES	SNB2	A-T-1	1-202	25-TESNB2-0			Rejected		FCM rejected due to missing signature on ITE report		
30 Apr 2024	Satis	factory Performan	EMR Demo Con	ipany CM	UAAA	A-T-1	1-202	26-CMUAAA	CAN-2026-CMUA	AA-0	Submission	Outstandin	9		
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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

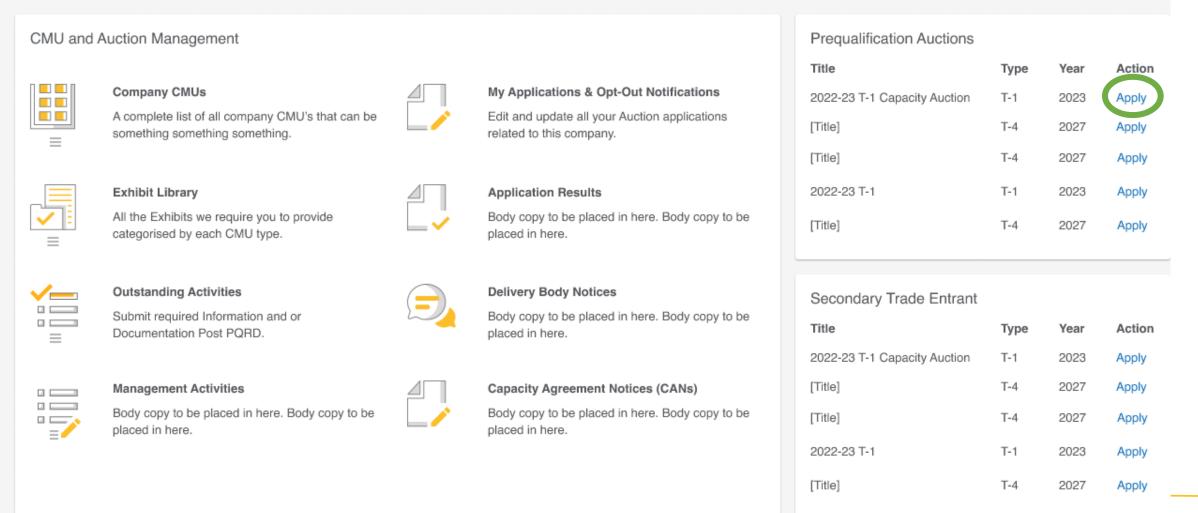
- Some of the 2023 Regulatory Changes have already been developed in the New EMR Portal and shared in previous demonstrations i.e. Primary Fuel at Component, Primary Fuel of a Proven DSR On site Generating Unit with the associated Capacity.
- The Method of Calculation selection will be amended in line 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).

Disputes

nationalgridESO | Electricity Market Reform

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My EMR



My EMR User	Management (Company Management	CMU's & Components	Disputes	national gridESO	Electricity Market Reform	÷
CMU Management						Create a CMU	
▲ There are CMU(s) th	at require the Compone	ent information to be updated	before an Application can be cr	eated using the relevant CMU.			
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Created	AB73WV	AB73WV	Existing Generating	Company Name Spread over two lines	6	Delete CMU	
Created	AB73WV	AB73WV	Existing Generating	Company Name Spread over two lines	6		0 0
Created	AB73WV	AB73WV	Existing Generating	Company Name Spread over two lines	6		

(CMU Managemen	t / AB73WV / CMU	Component Updates
	AB73WV Existing Generating	Status Update Required	Applicant Company Company Name long long name
			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
			Please select the relevant Primary Fuel Type for this component. Select an Option
			Fossil Fuel Component Declaration

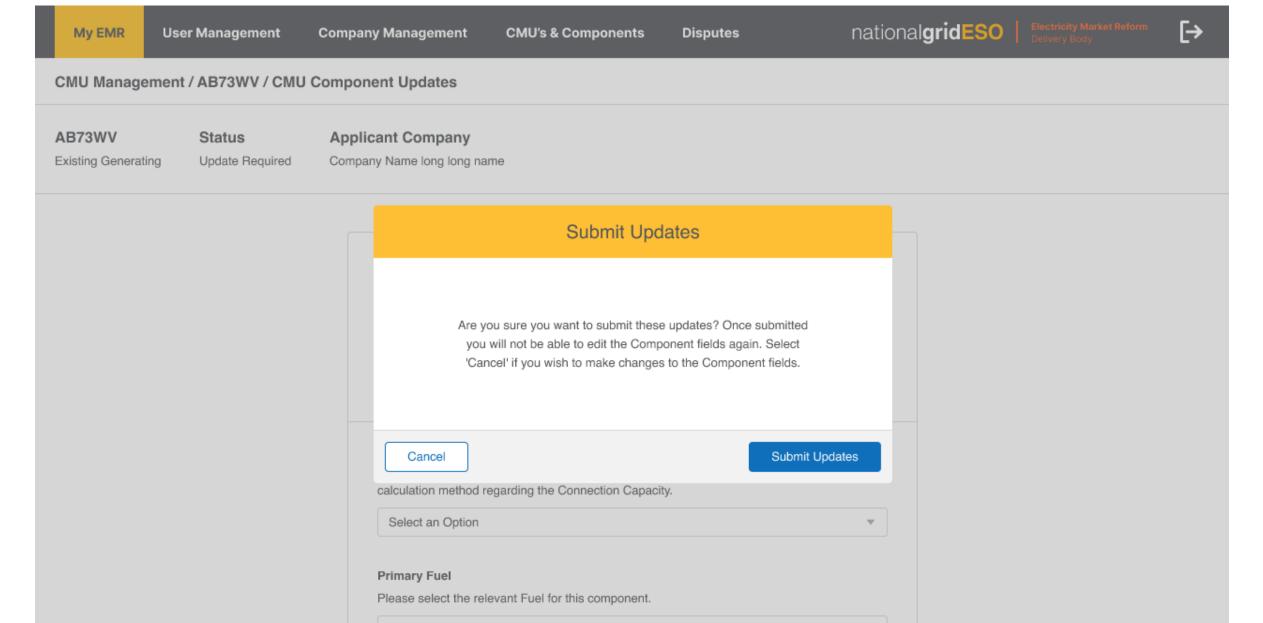
CMU Management / AB73WV / CMU Component Updates

atus date Required	Applic Compar	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'. 	
	Plea	Cancel Save Updates mary Fuel ase select the relevant Fuel for this component. elect an Option	

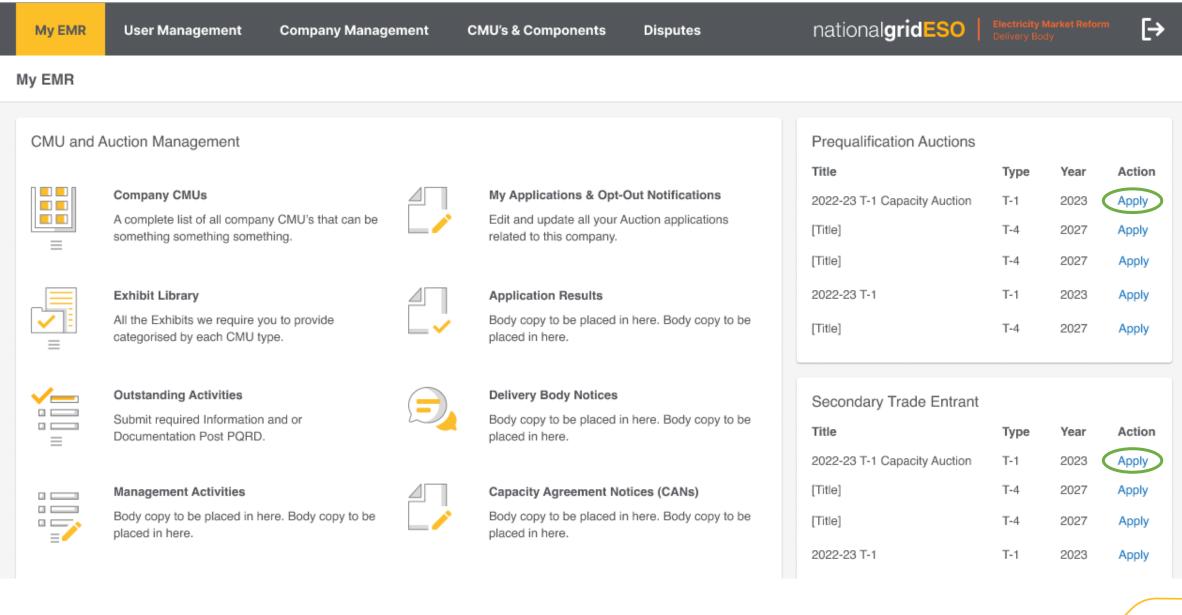
My EMR Use Vou have successfully updated XX out of XX Components for CMU XXXXXX. Complete all of the Component updates in order to be able to use the CMU in an Application.

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

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Created	AB73WV	AB73WV	Existing Generating	Company Name Spread over two lines	6	Delete CMU	:
Created	AB73WV	AB73WV	Existing Generating	Company Name Spread over two lines	6		
Created	AB73WV	AB73WV	Existing Generating	Company Name Spread over two lines	6		



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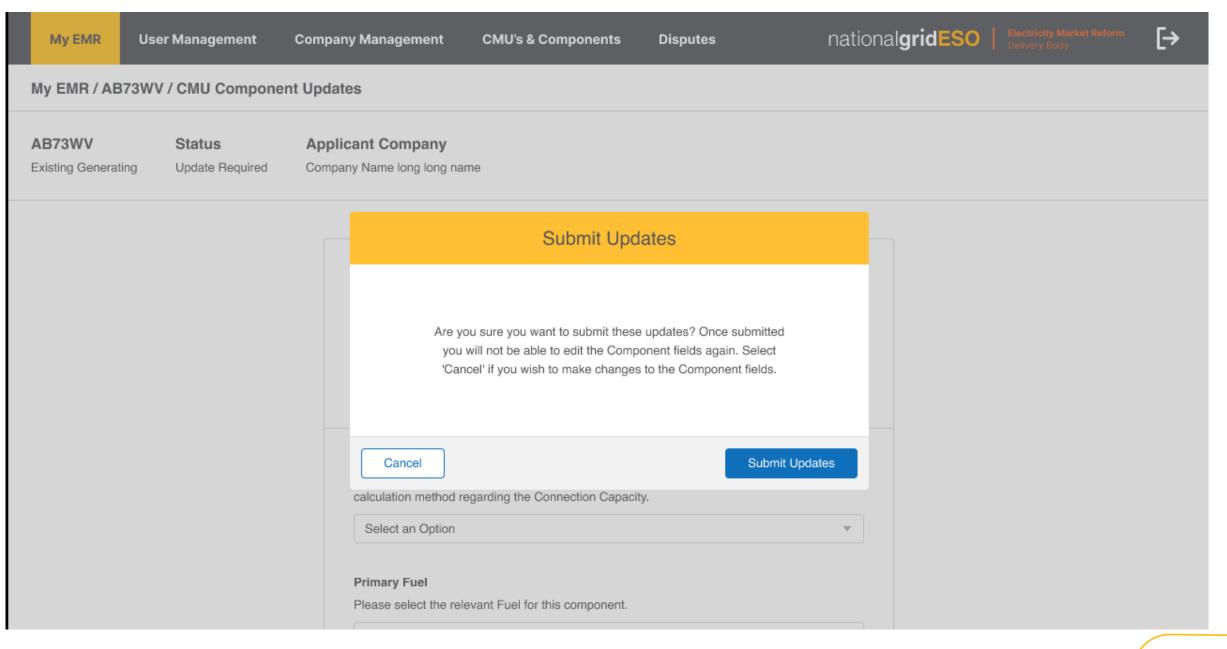
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My EMR / AB73WV / CMU Component Updates

 AB73WV
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 Applicant Company

 Existing Generating
 Update Required
 Company Name long long name

CMU Component Updates	
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AB73WV	A-T-1-2023-AB73WV-00001	Existing Generating	Company Name Spread over two lines	6

Application Details - Review	Application Questions	Declarations	Emissions	Pre Auction Activities
Standard Application G	Questions			v
	Multi-Unit Site			
	s this CMU part of a multi-unit site wit	th a shared Connection Agre	ement?	
	Yes			
	○ No			
	Total Site Capacity			
	Provide the Total Site Capacity as stat	ted on the Connection Agree	ment	
	ncluded CMUs			
L	List the other CMUs included in the sh	nared Connection Agreemen	t	
				J
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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.

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Create New Exhibit	My EMR User Management Company Management CMU's & Components
Cancel Preview Exhibit Form Save Submit Exhibit for Signatures	My EMR / Exhibit Library / Create New Exhibit
Create New Exhibit D	Exhibit A Form of Pregualification Certificate
Form of Applicant Declaration	
Complete the information below in order to create your new exhibit.	Create New Exhibit ZA
	Form of Fossil Fuel Emissions Declaration
Exhibit Title	Complete the information below in order to crea
MyExhibitTitle	
	Exhibit Title
Application Very	MyExhibitTitle
Application Year This is an Evergreen Exhibit and can be used up to 4 Years following a successful Application.	
XXXX	Applicant Name
	Lorem ipsum dolor sit amet
Party A This is the Legal Owner of each Generating Unit comprised in the Relevant CMU.	Letern pour over an arter
XXXX	Company Registration Number
	XXXXXXXX
Party B This is the Applicant Company which has Despatch Control with respect to each Generating	Registered Office Address
Unit comprised in the Relevant CMU.	Company name
Lorem ipsum dolor sit amet	Address Line 1 Address Line 2
CMU ID	Address Line 3
XXXXXXXX v	City Postcode
	CMU ID
Legal Owner Company – Single/Multiple Director/Officer(s)	XXXXXXXX
Does the Legal Owner Company have a single active Director/Officer or multiple active Director/Officers?	
Single director	Single/Multiple Directors
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					18					
X0+30000-300000										
				300000-30000-300						

Email notification for signatories

nationalgridESO Electricity Market Reform Delivery Body

Please Sign Documents

EMR Delivery Body has sent Exhibit ZA Test Doc - a113H000000tU44QAE pdf for your signature.

Please open the below Exhibit and complete the signature

Please click on the button below to start the signing process.

View Document

To view the audit trail, click here

Conga Sign Transaction ID: 30/7/ca7/8exr?tullprijugad@oeg/meuhotpa4jorwd.vo0

POWERED BY conga

Email notification for initiator

nationalgridESO

Electricity Market Reform Delivery Body

Documents Sent on Behalf of EMR Delivery Body

The document Exhibit ZA Test Doc - a113H000000tU44QAE.pdf has been sent out for signature on behalf of EMR Delivery Body to

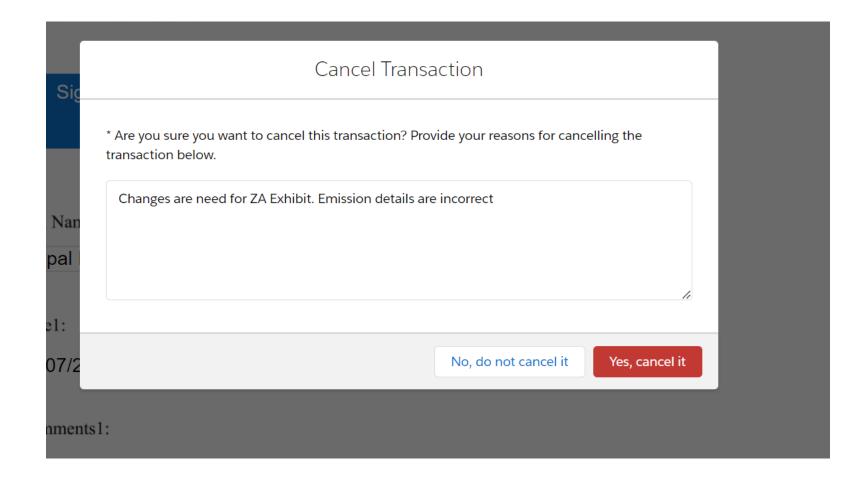
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To view the audit trail, click here

POWERED BY conga.

nationalgridESO Electricity Market Reform Delivery Body		Cancel Transaction	Complete Signing
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Exhibit ZA Test Document	
X Signature	Signer can decline using this button Click to sign
Full Name1:	
Gopal	
Date1:	
24/07/2023	
Comments1:	
Comments	



Email notification completed signature

nationalgridESO Electricity Market Reform Delivery Body

Signing Complete!

Exhibit ZA Test Doc - a113H000000tTlhQAM.pdf is fully executed. Please find the executed PDF attached.

To view the audit trail, click here

POWERED BY CONGA

Email notification for a cancelled transaction

nationalgridESO Electricity Market Reform Delivery Body

Transaction Cancelled

Conga Sign transaction 30f7loa7f6avr7bulljntjoqa5lfoegdneuhofjxa4jxmw3vo0 has been cancelled.

Cancelled Reason: Changes are need for ZA Exhibit. Emission details are incorrect

Please contact EMR Delivery Body directly for additional information.

To view the audit trail, click here

POWERED BY conga

My EMR Use		mpany Management CM	U's & Components	Disputes		Contractive Market Reform Contract Reform Cont
Filter CMU ID - Display All -	Filter Exhibit S	tatus Filter Exhibit Na v Display All -		company Name	* Search for Exhibit Title	Q
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MyExhibitTitle	Exhibit B	Awaiting Signature	Regular	123456	Company Name spread over two lines	View exhibit info
MyExhibitTitle	Exhibit C	Awaiting Signature	Evergreen	123456	Company Name spread over two lines	Manage exhibit form Download Exhibit
MyExhibitTitle	Exhibit D	Awaiting Signature	Evergreen	123456	Company Name spread over two lines	Delete exhibit
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MyExhibitTitle	Exhibit DB	Active	Evergreen	123456	Company Name spread over two lines	XX/XX/XXXX ~
MyExhibitTitle	Exhibit DC	Draft	Evergreen	123456	Company Name spread over two lines	XX/XX/XXXX

MyExhibitName						
[Company Name]	[CMU ID]					
Awaiting Signature						
Exhibit Template	Exhibit DC					
Description	Alternative form of Joint Owner					
	Declaration for Prospective					
Date Created	Interconnector CMU XX/XX/XXXX					
Exhibit Type	Evergreen					
Expiry Date	XX//XX/XXXX					
Signatories						
Signer 1	u will need to collect the required signatories. Name Name Surname (XX/XX/XXXX, 13:54)					
Signer 2	Name Name Surname (Awaiting Signature)					
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Funding Declaration (Exhibit J) Update

Feature Description

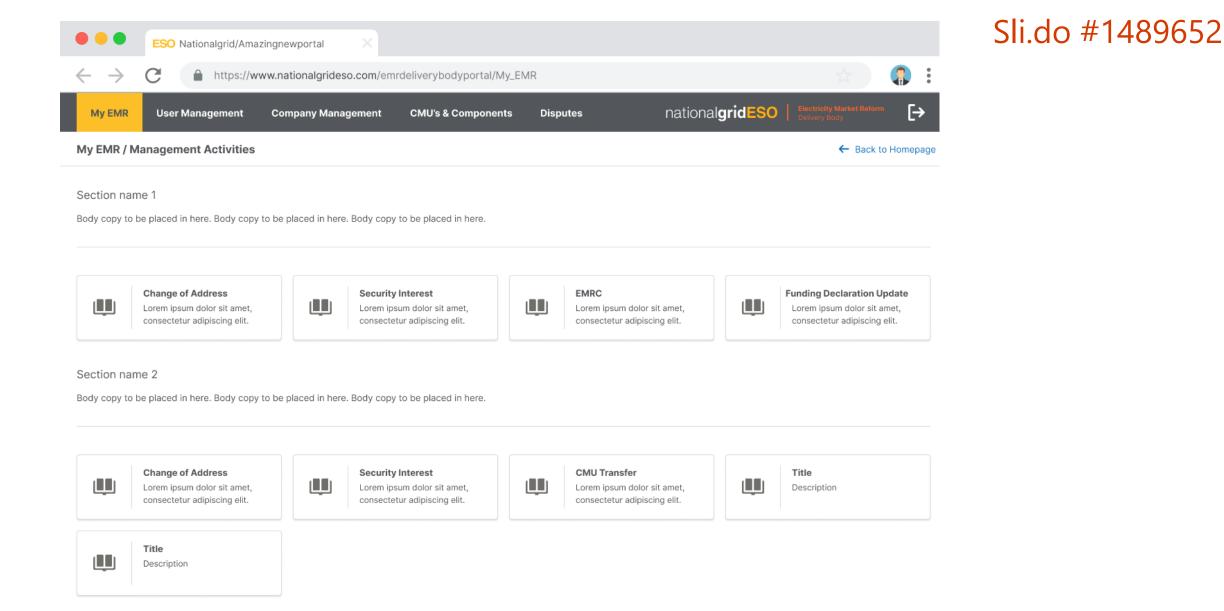
Under CM Rule 8.3.8 Capacity Providers with Prospective CMUs are obligated to inform the Delivery Body of any changes to their Funding positions following an initial Funding Declaration (Exhibit J) as a part of their FCM submission. This update takes the form of a new Exhibit J signed by directors declaring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



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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.

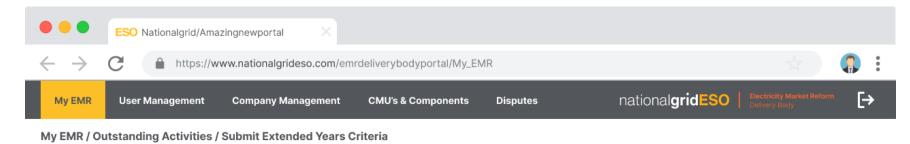
Customer Feedback Considered

- 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

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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.

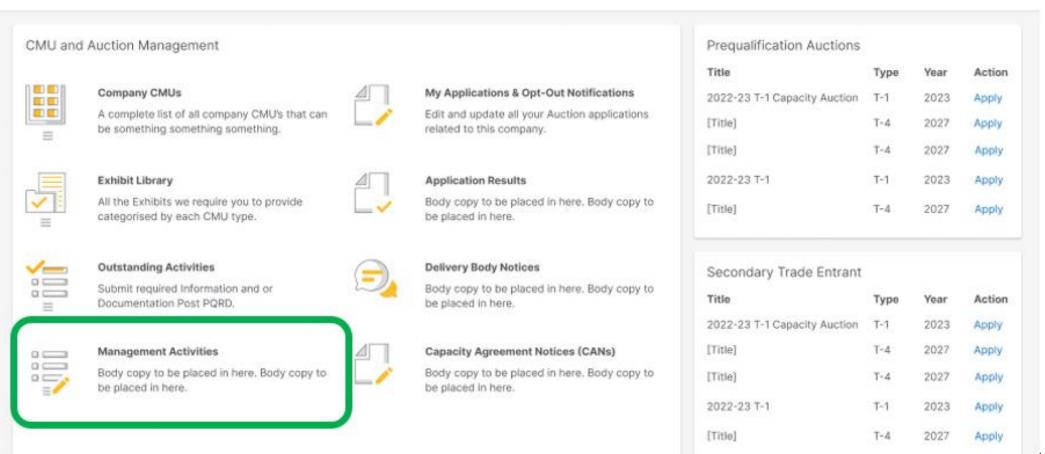
Customer Feedback Considered

- 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.

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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 Occured

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.

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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.

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Mixed Fuels

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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 2019.

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Extended Performance

Feature Description

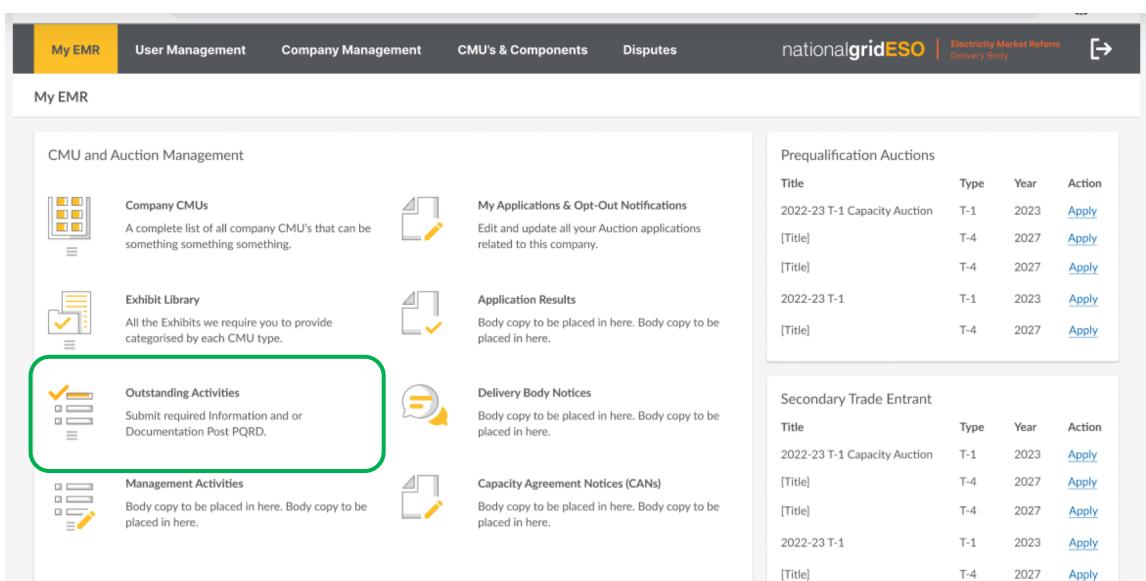
A Capacity Committed CMU with a Storage Generating Technology Class that was awarded a Multi-year Capacity Agreement after 21 December 2017 needs to demonstrate extended performance during at least one Satisfactory Performance Day in the Winter of the first Delivery Year, and then once every three years.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



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CAN Suspension

Feature Description

If, for any reason, the SPD or EP obligations are not achieved by the 1st May of the Delivery Year, the DB will suspend the Capacity Agreement. If the SPDs are submitted close to the 30th 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 2nd 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.

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r Capacity Agreements awarded po	st December 2017.	
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	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	

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 <u>box.newemr.itteam@nationalgrid.com</u>

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

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 13th & August 17th
SPD, Extend and withdraw terminations, MCR, Construction Reports, Exhibit ST entry application Evergreen Exhibit, Exhibit Generation, Confirmation of Entry, Secondary Trade Transferor	on, Completed	October
Secondary Trading Transferee, Emissions ZB- ZA, Issue Final Termination, Dispute Results, PM/P SoS Changes, Digital Signature, 2023 Regulatory Requirements (Prequal), Emissions Related Material Change, Final Termination, CMU Cloning	T, July 6th & August 17th	December / January 2024
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.	Mid September & Mid-October	January 2024 / February 2024

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.