

Company Management

Version 1.0

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1. Overview

Exploring the User experience, this document provides comprehensive guidance on the process of integrating additional Companies into a successfully registered Portal Account. It further details how Company Information can be managed.

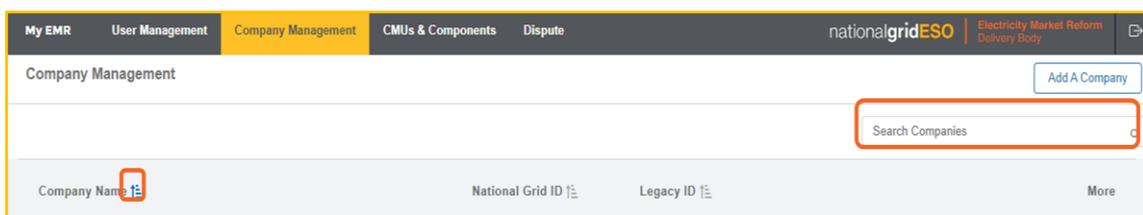
2. How to manage a Company in the EMR Portal

2.1 Company Management

- 2.1.1 In the New EMR Portal we have adopted the **Single Sign-on** approach for accessing a company portfolio. This means there will no longer be a need to have a different username and password for related Companies within that Portfolio. Access to Company information can be managed under one Account, using one set of login credentials.
- 2.1.2 In the Legacy EMR Portal, the only way a User could use the same login credentials for multiple Company Accounts was by setting up Sub-Companies. However, with the new Single Sign-on approach; a User can manage all the Companies in their Portfolio under one Account, and this is not restricted to only Sub-Companies.
- 2.1.3 If a User wants to add more than one Company to the EMR Portal and prefers to manage each Company in separate accounts; then the User will need to use different contact email addresses when registering each new Company.



- 2.1.4 In the top left of the EMR Portal home screen, select **Company Management**.
- 2.1.5 On the Company Management screen there is a search field, whereby the relevant Company registered under the EMR Portal account can be searched for. The **Sort** functionality allows the data to be sort alphabetically for qualitative values (e.g. Company Name).



2.2 Adding a Limited Company

- 2.2.1 This section pertains to registering a UK based Limited Company, this includes Limited Companies, PLCs and LLPs all of which should be registered on Companies House with a Company Registration Number.
- 2.2.2 Companies other than a UK based Limited Company should follow the Registering A Non-Limited Company within this guidance.

2.2.3 To add a Limited Company to the EMR Portal account select **Add A Company** in the top right of the Company Management screen.



2.2.4 In the next screen, there will be an option to select whether the Company is a Limited or Non-Limited Company. **LTD Company** will be pre-selected.

2.2.5 Input the **UK Company Registration Number** and press enter to start the Company details search. The Company Name and Address will be auto populated from Companies House, so ensure these details are up to date on Companies House.

2.2.6 Select an Active Director from the drop-down menu and enter the Director's email address. Click on the toggle next to **These Details Are Correct** to confirm the details.

2.2.7 Click **Save**.

2.2.8 There is a green toaster message that will appear confirming the successful addition of the relevant Company.

2.2.9 An email notification will be sent to the nominated Director confirming the registration of the Company on the EMR Portal, with the First and Last name of the User who carried out the Company registration.

2.3 Adding a Non-Limited Company

2.3.1 To add a Non-Limited Company to the EMR Portal account select **Add A Company** in the top right of the Company Management screen.



2.3.2 In the next screen, there will be an option to select whether the Company is a Limited or Non-Limited Company. Select **NON Limited Company**.

2.3.3 Select **Business Type** from the drop-down menu and enter the Business Name.

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2.3.4 Enter the Owner / Director contact information and the Company/Business address details.

2.3.5 Click **Save**.

The screenshot shows a registration form with the following fields and callouts:

- 1**: Radio buttons for "LTD Company" and "NON Limited Company".
- 2**: A box containing "Business Type" (dropdown menu) and "Business Name" (text input).
- 3**: A box containing "Owner / Director For Contact Purposes" (text input), "Owner / Director For Contact Purposes" (text input), "Owner / Director Email" (text input), "Confirm Owner / Director Email" (text input), "Company / Business Address" (text input), "Address" (text input), "Address" (text input), "Town" (text input), "Locality" (text input), "Postal Code" (text input), and "Country" (dropdown menu).
- 4**: A "Save" button.

2.3.6 There is a green toaster message that will appear stating the Company details will be reviewed and the Delivery Body will provide an update within 5 working days.

2.3.7 Once the Delivery Body approves the Company Registration, the Owner/Director whose email address was entered, will receive an email notification confirming the registration of the Company on the EMR Portal, with the First and Last name of the User who carried out this action.

2.3.8 If the Company Registration is rejected by the Delivery Body, the User who carried out the Company Registration will receive an email notification stating the reason why the Company Registration was rejected.

2.4 Managing Company Details

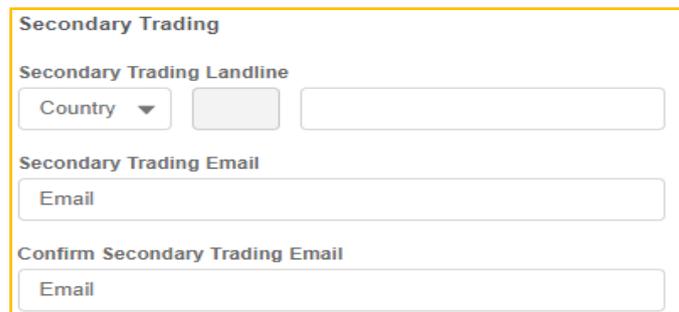
2.4.1 To amend any of the Company details, the User will need to navigate to Company Management. In the list of Companies; click on the three vertical dots on the **More** column on the right hand side of the relevant Company.

Company Name	National Grid ID	Legacy ID	More
DISPUTE DATA LTD	NGRID-230720		⋮

2.4.2 A new screen will appear which will show the Registered Company Information on the left and the editable Company details on the right.

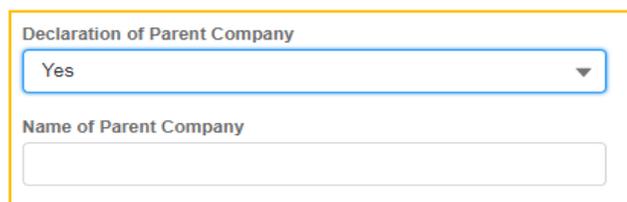
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2.4.3 Enter the **Secondary Trading** phone number and email address. This information is provided in this area of the EMR Portal, so that it will auto populate against any Prequalification Application or Secondary Trading Entrant that the relevant Company makes, if they ever decide to participate as an Applicant in the Capacity Market as per CM Rule 3.4.1(c)(ii).



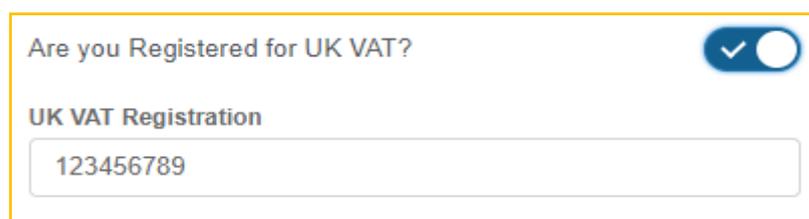
The screenshot shows a form titled "Secondary Trading". It contains three sections: "Secondary Trading Landline" with a "Country" dropdown menu and a text input field; "Secondary Trading Email" with a text input field labeled "Email"; and "Confirm Secondary Trading Email" with another text input field labeled "Email".

2.4.4 Select the drop-down menu to declare if the Company has a **Parent Company**, and if 'Yes' is selected enter the name of the Parent Company. This information is provided in this area of the EMR Portal, so that it will auto populate against any Prequalification Application or Secondary Trading Entrant that the relevant Company makes, if they ever decide to participate as an Applicant in the Capacity Market as per CM Rule 3.4.1(ca).



The screenshot shows a form titled "Declaration of Parent Company". It features a dropdown menu with "Yes" selected and a text input field labeled "Name of Parent Company".

2.4.5 Select the toggle next to the field **Are you Registered for UK VAT?** and enter the Company's UK Value Added Tax identification number (if applicable). This information is provided in this area of the EMR Portal, so that it will auto populate against any Prequalification Application or Secondary Trading Entrant that the relevant Company makes, if they ever decide to participate as an Applicant in the Capacity Market as per CM Rule 3.4.1(g).



The screenshot shows a form titled "Are you Registered for UK VAT?". It includes a toggle switch that is turned on (checked) and a text input field labeled "UK VAT Registration" containing the number "123456789".

2.4.6 Upload the **Required Documentation** of Certificate of Incorporation, Prequalification Certificate (Exhibit A) and Certificate of Conduct (Exhibit C) paying attention to the onscreen details outlining file type and size.

2.4.7 Please note the Delivery Body are committed to amending the current functionality of uploading Exhibits A and Exhibit C at Application level and will move this to Company level instead, therefore removing the requirement to upload the same Exhibit multiple times during the Application process. The Delivery Body will ensure this update is in place before the start of the 2024 Prequalification Application Submission Window.

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2.4.8 These documents are uploaded in this area of the EMR Portal, so that they will auto populate against any Prequalification Application or Secondary Trading Entrant that the relevant Company makes, if they ever decide to participate as an Applicant in the Capacity Market. Or if the relevant Company decides to carry out a CMU Transfer. These documents are required as per CM Rules 3.4.2(a), 3.12.3 and 3.12.4.

Required Documentation

Certificate of Incorporation

In order to finish the company registration, we will need to view Certificate of Incorporation.

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

 Upload Document

2.4.9 Once all the mandatory fields are filled in, click **Save & Close**.



3. Glossary of Terms and Rules/Regulations Referenced

3.1.1 The following Capacity Market (CM) Rules should be considered when using this document:

- (a) CM Rule 3.4.1(c)(ii)
- (b) CM Rule 3.4.1(ca)
- (c) CM Rule 3.4.1(g)
- (d) CM Rule 3.4.2(a)
- (e) CM Rule 3.12.3
- (f) CM Rule 3.12.4

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