

# G19 – EMR Settlement Portal User Guide

EMRS Guidance

Public

**Version:** 8.0  
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## Change Amendment Record

Version	Date	Description
1.0	19 December 2016	Go-Live Version
2.0	4 August 2017	Document transferred into new template.
3.0	6 September 2018	Minor grammar amendments, terms, and conditions review.
4.0	16 September 2019	Minor grammar amendments and updating of expired links.
5.0	13 May 2020	Updates for metered data report
6.0	29 June 2020	Authorised Contacts updates
7.0	10 December 2020	Clarifications for Interconnector metered data reports, CMVRN submission via the EMRS Web Portal and Annual Review
8.0	1 June 2021	Updates for My EMRS

## 1. Introduction

The EMR Settlement Portal (EMR Settlement Portal) provides a safe and secure environment for EMR Parties to easily view, download, save and print their settlement files. The EMR Settlement Portal holds all issued settlement files produced after December 2015, i.e. invoices, Credit Notes, Notices, Credit Cover reports, Capacity Provider Metered Data and Backing Data. It is updated on a daily basis to include the latest settlement files. The EMR Settlement Portal is an additional channel for accessing settlement files.

## 2. Purpose

The purpose of this document is to answer the following questions:

- Who can have access to the EMR Settlement Portal?
- How do I register?
- How do I log in to the EMR Settlement Portal?
- How do I see what EMR Parties I am associated with?
- How do I update my password?
- How do I recover a forgotten password?
- How do I access my settlement files?
- Is there any frequently asked questions?

## 3. Whom is this document for?

This document is for all EMR Parties including Suppliers, CFD Generators and Capacity Providers.

For the avoidance of doubt, the terms “we”, “our(s)” and “us” refer to EMRS as the owner or the licensee of all intellectual property rights (including copyright) in our EMR Settlement Portal, and in the material published on it.

## 4. Associated Documents

This document should be read in conjunction with:

- [G25 - My EMRS Registration User Guide](#)<sup>1</sup>
- G4 – EMR Settlement Authorisations<sup>2</sup>

## 5. Who can have access to the EMR Settlement Portal?

All EMR Parties (Suppliers, CFD Generators and Capacity Providers) will have access to the EMR Settlement Portal. Due to the commercial nature of the data within the files available, access is limited to certain authorised roles that have been registered through the EMRS registration process via [My EMRS](#). These authorised roles are:

- Primary Authority
- Finance Authority
- Operating Authority

<sup>1</sup> <https://www.emrsettlement.co.uk/publications/guidance/>

<sup>2</sup> <https://www.emrsettlement.co.uk/publications/guidance/>

- User
- Credit Contact
- Trading Contact

If you wish to amend the authorised roles for your organisation and therefore who has access to the EMR Settlement Portal, please follow the process set out in [G25 - My EMRS Registration User Guide](#)<sup>3</sup>.

Please inform EMRS immediately if a registered user leaves your organisation and therefore should not be an Authorised User or have access to the EMR Settlement Portal. Without the amendment of Registration Details on [My EMRS](#), existing registered users of My EMRS will retain access to the EMR Settlement Portal and therefore the data for your organisation.

Please note access to the EMR Settlement Portal is granted when a user is registered as an authorised contact with EMRS. They may therefore have access to the EMR Settlement Portal before there are settlement files available for their organisation for example if a Capacity Provider has completed the registration process ahead of a Delivery Year they have a Capacity Agreement for. The same applies for CfD Generators where they may already be granted access to the EMR Settlement Portal before there are settlement files available for their organisation.

## 6. How do I register?

Once EMRS has received and processed the submitted Registration Details for an EMR Party on My EMRS<sup>4</sup>, any new authorised contacts will receive an email inviting them to register for the EMR Settlement Portal. Where a user is a registered and authorised contact for more than one EMR Party they will only need to register once on the EMR Settlement Portal and will be able to see settlement files for all EMR Parties with a single login.

Please note, the EMR Settlement Portal and [My EMRS](#) are used for different purposes therefore a single login cannot be used on both websites. An authorised contact<sup>5</sup> will have to create user accounts separately for both websites.

The link in the registration email will direct you to the New User Registration page of the EMR Settlement Portal. You will be asked to:

- Provide your email address. This will be your user name and must match what was provided on [My EMRS](#) for your organisation.
- Provide your first and last name.
- Create a password.
- Create a secret question and answer. This will be used as part of the forgotten password process.

Once you have input your details click on "Create Account".

You will then be prompted for an activation code. This code is sent to your email address. Please also check your spam filters and junk emails. If you do not receive the email with the authorisation code please contact us on 020 7380 4333 or email [contact@emrsettlement.co.uk](mailto:contact@emrsettlement.co.uk).

Once you have received the activation code, enter it into the activation code field and press the "Activate your Account" button.

<sup>3</sup> <https://www.emrsettlement.co.uk/publications/guidance/>

<sup>4</sup> My EMRS provides a secure and simple way for EMR Parties to view, submit and amend the Party Details that are used to support settlement activities.

<sup>5</sup> The access to My EMRS will be restricted to the following registered EMR Authorised Contacts: Primary Authority, Finance Authority, Operating Authority and Trading Contact.

### Activate Your Account

Thank you for registering. You have been sent an email with a confirmation code which is required to activate your account (we need to be sure that you are the real owner of your email address). Enter the confirmation code in the field below and press activate to begin enjoying the site.  
*Note: The unlock code is only valid for 60 minutes. If not activated within this period, your account will be automatically deleted.*

Enter your unlock code here

Once successful, you will be prompted to log in.

## 7. How do I log in to the EMR Settlement Portal?

Open a web browser (all recent versions of Microsoft Edge, Google Chrome, Mozilla Firefox, Safari and most others are supported) and navigate to [www.emrsettlementportal.co.uk](http://www.emrsettlementportal.co.uk) and press "Log In" from the horizontal menu bar. You will see the below screen.

Enter your username and password, and press the "Log in" button. If you enter your password incorrectly three times, your account will be temporarily locked for an hour. The below notification will appear.

If you need access to your account immediately, please contact us on 020 7380 4333 or email [contact@emrsettlement.co.uk](mailto:contact@emrsettlement.co.uk).

## 8. How do I see what EMR Parties I’m associated with?

Your 'My Profile' page allows you to check which EMR Parties are associated with your account. The EMR Parties associated with your account will be listed under your profile details. The EMR Parties listed should match the parties you are an authorised contact for. To amend your associations please follow the process set out in [G25 - My EMRS Registration User Guide](#).

## 9. How do I update my password?

Your 'My Profile' page allows you to update your display name and password. Please note that you are not able to update your username (i.e. your email address) as this is used to verify your account. To amend your email address details please follow the process set out in [G25 - My EMRS Registration User Guide](#)

To change your password, click on the "Change Your Password" button to the right of your username.

Basic User Details | Bookmarks

### My Basic Details

This page allows you to view and make changes to the basic details that we hold for you. These changes are applied individually and take effect immediately. Note that your username (i.e. your email address) cannot be changed, since it is our means of verifying your identity, and decisions about permissions granted to you may have been on the basis of verifying you this way (for example verifying you as a member of a particular company).

Your Username:	<input type="text" value="joe.bloggs@emrsettlement.co.uk"/>	<a href="#">Change Your Password</a>
Your Display Name:	<input type="text" value="Joe Bloggs"/>	<a href="#">Change Your Display Name</a>
Last Login:	<input type="text" value="14/11/2016 10:39:47"/>	

The below form will appear under the list of EMR Parties you are associated with. Enter your new password and click on "Change your Password". Once successful, you will see a notification at the top of the page confirming your password has been updated.

< Change Your Password

To change your password, enter your new desired password in both fields below. Passwords must be at least eight characters long, must contain at least one of the following (Upper case characters, Lower case characters, Numbers), must not contain the user's first or last names, and must not be a re-use of any of your eight most recent passwords.

Enter CURRENT Password:	<input type="text"/>
Enter New Password:	<input type="text"/>
Repeat New Password:	<input type="text"/>

[Change Your Password](#)

You can change your display name by clicking on "Change your Display Name". A form will appear under the list of EMR Parties you are associated with. Enter your updated details and click on "Change your Display Name". Once successful, you will see a notification at the top of the page confirming your display name has been updated.

## 10. How do I recover a forgotten password?

To reset your password: open a web browser and navigate to [www.emrsettlementportal.co.uk](http://www.emrsettlementportal.co.uk). Press "Log in" from the horizontal menu bar and click the "I've forgotten my password" link under the login form.

When prompted, enter your EMR Settlement Portal username (which will be your email address). You will then be asked for a confirmation code. This code has been sent to your email address. Please check your spam filters and junk emails. If you do not receive the email with the code please contact us on 020 7380 4333 or email [contact@emrsettlement.co.uk](mailto:contact@emrsettlement.co.uk).

#### Forgotten Password

Copy this confirmation code from the email, paste it into the confirmation code field and press the "Continue Unlock Process" button.

You will be presented with the security question that you provided when you first registered for the EMR Settlement Portal and asked for the answer to the question. Supply the answer and press the button to continue.

You will be logged in, taken to your profile page and asked to change your password. You will need to click on the "Change Password" button next to your username. A form will appear under the EMR Parties associated with your account. You will not need to supply your old password.

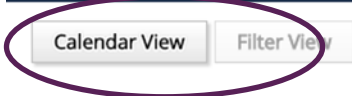
## 11. How do I access my settlement files?

The EMR Settlement Portal holds all issued settlement files produced after December 2015, i.e. invoices, Credit Notes, Notices, Credit Cover reports and Backing data. It is updated on a daily basis to include the latest settlement files.

To view your settlement files, choose "Settlement Downloads" from the horizontal menu. There are two different views, calendar view and filter view, which displays settlement files and allow you to search in slightly different ways. You can switch between the views by clicking on the tabs at the top of the page. The page will default to "Calendar View".

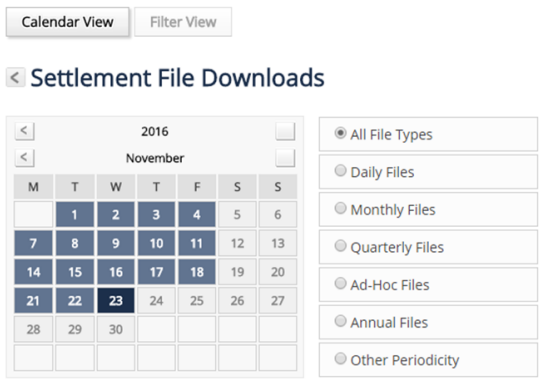


HOME	SETTLEMENT DOWNLOADS	MY PROFILE	HELP & SUPPORT	SEARCH	ADMIN	LOG OUT
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### ← Settlement File Downloads

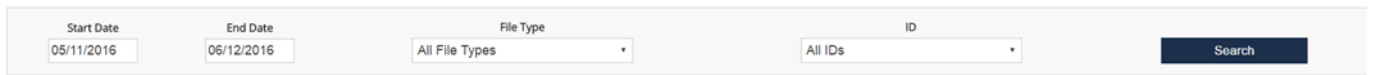
In Calendar View, you can use the back and forward buttons to navigate through the calendar to a shaded day. A shaded day indicates that there are settlement files that you are able to view for that day. A darker coloured day indicates the date you are currently viewing data for.



You can choose Settlement Data for an entire month or year by clicking on the name of the month or year. You can also choose a file periodicity by using the buttons next to the calendar (e.g. daily, weekly, monthly, etc.) or leave it at its default of all files.

Below the calendar, a list of files will appear matching your selections (or a message telling you that no files match your selection). The files are grouped together so all settlement files linked to an invoice or Credit Note are shown on one row. You can download the files by clicking the links to the right of each row.

For the Filter View, click the "Filter View" button. Filter view allows you to search for settlement files by a date range. You can also limit the results to a specific file type (e.g. CFD Daily Supplier Invoice) or an EMR Party.



The search results can be sorted by EMR Party ID, publish date and description. Files are listed individually, not grouped into batches as they are in the calendar view. You can download the files by clicking the links to the right of each row.

## 12. Capacity Provider Metered Data

Metered data can be viewed each day as a report on the EMR Settlement Portal. This can be used to validate data, identify missing periods which could impact performance in a stress event, view data used for SPD and DSR tests (Capacity Providers can use this information to contact their Supplier/HHDA if there are any concerns), and validate Capacity Payments. It is advised that Capacity Providers check all the data they require is available before they start the DSR and SPD processes with the Delivery Body, as it would be this data that is used for those calculations (this includes bespoke metering pathway and self-submission).

Metered Data for Interconnectors will only be included in these reports, when there has been a Stress Event (Interconnectors receive Capacity Payments based on their Awarded Auction Capacity Obligation (AACO)). During a Stress Event, EMRS utilise the Scheduled Transfer data provided by the National Grid ESO to determine if the Interconnector has met its obligation.

The period covered by the report is the latest settlement data for the current delivery year and the three months prior to that. This report is overwritten each day with the latest available data by 11am for each Capacity Provider.

The metered data for each settlement date will be:

- a. The latest settlement run available (between II and RF) for that settlement date; or;
- b. The most recently received data where the data has been provided via self-submission.

Where there are blanks in the report this indicates missing or self-submitted data.

In the event of missing data or issues in the downloading via the EMR Settlement Portal please contact EMRS via e-mail at [contact@emrsettlement.co.uk](mailto:contact@emrsettlement.co.uk). In your correspondence, please include:

- Your Party ID,
- Dates for missing data; and
- A description of the issue.

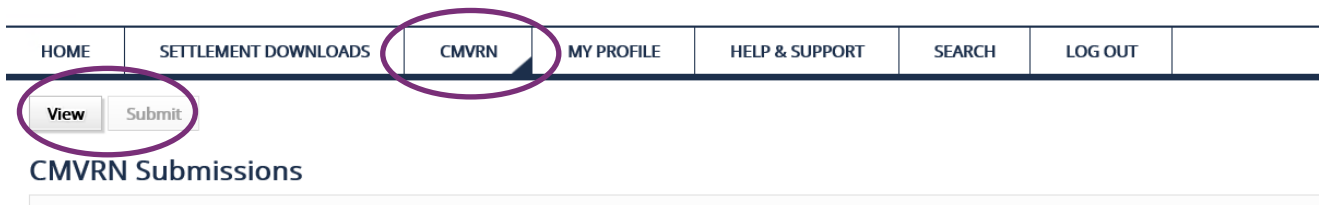
N.B – Due to the data contained in these reports, they can be quite sizeable.

### 13. How do I Submit CMVRNs via the EMR Settlement Portal

Capacity Providers are required to submit Capacity Market Volume Reallocation Notifications (CMVRNs) via the CMVRN tab in the EMR Settlement Portal.

Once logged into the EMR Settlement Portal, select the '**CMVRN**' tab option as below;

There will be two options available for you to '**View**' previously submitted CMVRNs and their statuses and an option to '**Submit**' CMVRNs:



#### Submitting a CMVRN:

On the CMVRN tab, there is a form that the owner(s) of each participating CMU(s) will need to fill in to submit CMVRNs. The form contains the CMVRN ID, EMR Party ID, Transferor Party ID and CMU ID, Transferee Party ID and CMU ID, Settlement Date, Settlement Period and Traded Volume.

You will need to click on the '**Submit**' button to navigate to this form:



HOME	SETTLEMENT DOWNLOADS	CMVRN	MY PROFILE	HELP & SUPPORT	SEARCH	LOG OUT
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View Submit

Create New CMVRN Submission

This page allows you to create a new CMVRN Submission. For help and more information, please visit the [guidance section](#).

EMR Party ID:

You will need to complete the form with the relevant details as per the example below and there will be tooltip guidance to help with completing the form:

HOME	SETTLEMENT DOWNLOADS	CMVRN	MY PROF
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View Submit

Create New CMVRN Submission

This page allows you to create a new CMVRN Submission. For help and more inf

EMR Party ID:

Unique identifier for each EMR Party. It can be up to 8 characters (letters and/or numbers)

CMVRN ID:

Transferor Party ID: <input type="text" value="DSR"/>	Transferee Party ID: <input type="text" value="GENERATE"/>
Transferor CMU ID: <input type="text" value="DSRBMU"/> <small>Please enter an ID with character limit of 6</small>	Transferee CMU ID: <input type="text" value="STORGT"/>

Settlement Date <input type="text" value="26/10/2014"/>	Settlement Period: <input type="text" value="17"/>	Volume (MWh): <input type="text" value="-4.762"/>
Settlement Date <input type="text" value="26/10/2014"/>	Settlement Period: <input type="text" value="18"/>	Volume (MWh): <input type="text" value="-2.031"/>

Adding multiple periods:

You will also be able to add multiple periods by clicking on the 'Add Period' button and a 'Remove Period' button if required:

Settlement Date <input type="text"/>	Settlement Period: <input type="text"/>	Volume (MWh): <input type="text"/>
Settlement Date <input type="text"/>	Settlement Period: <input type="text"/>	Volume (MWh): <input type="text"/>
<input type="button" value="Add Period"/>	<input type="button" value="Remove Period"/>	<input type="button" value="Submit"/>

Submitting a form:

Once you have completed the form, you will need to click on the 'Submit' button to complete the submission:

Settlement Date <input type="text" value="26/10/2014"/>	Settlement Period: <input type="text" value="18"/>	Volume (MWh): <input type="text" value="-2.031"/>
<input type="button" value="Add Period"/>	<input type="button" value="Remove Period"/>	<input type="button" value="Submit"/>

Once the form has been submitted, the EMR Settlement Portal will display a message on the CMVRN screen with a "Submitted" response to confirm the submission has been sent. If you do not receive a "Submitted" response, you will need to check that each field on the form has been correctly populated.

Checking the CMVRN submission status on the View tab:

The EMR Settlement Portal will display the CMVRN submission status on the CMVRN 'View' tab once the form has been submitted:

<input type="button" value="View"/>	<input type="button" value="Submit"/>		
<b>CMVRN Submissions</b>			
This page allows you to submit CMVRN volume data. For help and more information, please visit the <a href="#">guidance section</a> .			
<b>Submission Date</b> ▾	<b>CMVRN ID</b> ▾	<b>Acceptance Status</b> ▾	<b>EMR Party ID</b> ▾
23/10/2020 11:59:23	CMVRN_DSRBMU_STORGT_101	Submitted - Awaiting Response	GENERATE

Viewing previously submitted CMVRNs/ checking the status of your CMVRN submissions:

You will need to click on the **'View'** button to view any submitted CMVRNs and a list of submissions and the status of the CMVRNs will be displayed as below:

HOME	SETTLEMENT DOWNLOADS	CMVRN	MY PROFILE	HELP & SUPPORT	SEARCH	LOG OUT																
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; border-radius: 50%; padding: 2px 5px; display: inline-block;">View</div> <div style="border: 1px solid black; border-radius: 50%; padding: 2px 5px; display: inline-block;">Submit</div> </div> <h3>CMVRN Submissions</h3> <p>This page allows you to submit CMVRN volume data. For help and more information, please visit the <a href="#">guidance section</a>.</p> <table border="1"> <thead> <tr> <th>Submission Date ▾</th> <th>CMVRN ID ▾</th> <th>Acceptance Status ▾</th> <th>EMR Party ID ▾</th> </tr> </thead> <tbody> <tr> <td>23/10/2020 13:55:12</td> <td>CMVRN_DSRBMU_STORGT_101</td> <td>Load Unsuccessful</td> <td>GENERATE</td> </tr> <tr> <td>23/10/2020 12:33:01</td> <td>CMVRN_DSRBMU_STORGT_101</td> <td>Load Successful and Volume Match Unsuccessful</td> <td>GENERATE</td> </tr> <tr> <td>23/10/2020 11:59:23</td> <td>CMVRN_DSRBMU_STORGT_101</td> <td>Load Successful and Volume Match Unsuccessful</td> <td>GENERATE</td> </tr> </tbody> </table>							Submission Date ▾	CMVRN ID ▾	Acceptance Status ▾	EMR Party ID ▾	23/10/2020 13:55:12	CMVRN_DSRBMU_STORGT_101	Load Unsuccessful	GENERATE	23/10/2020 12:33:01	CMVRN_DSRBMU_STORGT_101	Load Successful and Volume Match Unsuccessful	GENERATE	23/10/2020 11:59:23	CMVRN_DSRBMU_STORGT_101	Load Successful and Volume Match Unsuccessful	GENERATE
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23/10/2020 11:59:23	CMVRN_DSRBMU_STORGT_101	Load Successful and Volume Match Unsuccessful	GENERATE																			

The following notifications will be on the CMVRN screen of the EMRS Portal detailing the status of the CMVRN submissions:

- “Load Successful and Awaiting Match” – the CMVRN has loaded successfully and is waiting for a match, followed by either;
  - “CMVRN Match Successful”; or
  - “CMVRN Volume Match Unsuccessful”
- “Load Successful and Matched” – the CMVRN has been loaded and matched successfully
- “Load Unsuccessful” – the CMVRN has failed to load into the system. This indicates there are errors in the CMVRN that need correcting before resubmitting.\* “Load Successful and Volume match unsuccessful” – the CMVRN has been loaded successfully but does not match with the other CMVRN due to a volume mismatch.

\*If there is a “Load Unsuccessful” notification, you will receive a follow up email from EMRS with further details about why your CMVRN did not load successfully.

Please note, that in the instance where a CMU has been transferred between two Capacity Providers by a Physically Traded Capacity Obligation (PTCO), only the Capacity Provider against which the CMU is registered on the settlement date of the Stress Event can submit a volume reallocation notification. Penalties are apportioned based on the number of days in the month the CMU is held by each Capacity Provider (as defined in the Regulations). Refer to G17 – Capacity Provider Payments<sup>6</sup>.

<sup>6</sup> <https://emrsettlement.co.uk/publications/working-practices/>

## 14. Is there any frequently asked questions?

There are a number of frequently asked questions available, which provide information on how to use the EMR Settlement Portal and how to find additional information. To view them, click on Help & Support along the horizontal menu. The list of questions can be searched and filtered by tags.

There are also [frequently asked questions](#) available on the EMRS website.

## 15. Need more information?

If you would like any additional information or support with the EMR Settlement Portal, please email us at [contact@emrsettlement.co.uk](mailto:contact@emrsettlement.co.uk) or call us on 020 7380 4333.

## 16. Acronyms and Definitions

A list of acronyms and definitions can be found in the '[Acronyms and Definitions](#)' document on our website<sup>7</sup>.

<sup>7</sup> Acronyms and Definition available on the EMRS website: <https://emrsettlement.co.uk/publications/>


## 17. Appendix 1 – EMR Settlement Portal Terms & Conditions


Please read these terms and conditions carefully before using this site. You can find these by accessing the EMR Settlement Portal and clicking on Help & Support.


### Help & Support


This is the help and support category


Title ▲


 Internal User Content

 Cookie policy

 EMR Settlement Portal User Guide

 Frequently Asked Questions

 Privacy Policy

 **Terms & Conditions**

