



# CfD Company Registration & User Guidance Document

September 2021

Version 1.0



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Capitalised terms used in this document shall have the same meanings given in the Contracts for Difference (Allocation) Regulations. Please note that the rules outlined in the Allocation Framework and Contracts for Difference (Allocation) Regulations take precedence over this guidance document and participants are encouraged to familiarise themselves with these rules, and if appropriate seek legal advice, before proceeding with an application.

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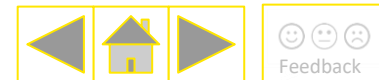
# Version control

The table below will record the page numbers of any new changes to the document for each version. The new changes will be highlighted in yellow throughout the guidance document.

Page	Changes	Page(s)	Date
1.0	Original document	-	03/09/2021



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# Delivery Body Portal system requirements

Please ensure that you are familiar with these recommended requirements before completing your CfD Application in the EMR Delivery Body Portal:



**Recommended PC**  
Operating System:  
**Microsoft Windows**  
(e.g. Windows 2003 to  
Windows 10)

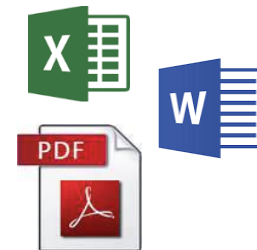
**Recommended Internet**  
Browsers:  
**Microsoft Edge, Google  
Chrome or Firefox**



If multiple file uploads  
are not accepted:  
**Please compile files  
into a single PDF or ZIP**

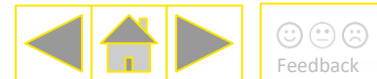
**Maximum** file size for  
uploads:  
**2GB**

**Mandatory** file formats:  
**Microsoft Office files,  
PDF or JPEG**  
(e.g. .docx/.xlsx/.pdf)





# 1. Introduction (1/3)



Any company or organisation that wishes to apply for a Contract for Difference (CfD) must first register with the EMR Delivery Body. This is to ensure that an application is being made with the consent of an Authorised Person (usually a Director or partner) from that organisation. This embeds a level of governance around the process to prevent unauthorised applications.

An Authorised Person may nominate a person(s) to act as a Main Administrator (Main Admin) on their behalf, to carry out the necessary activities for their application and sealed bid submissions. A Main Admin can subsequently assign additional Main Admins to assist in this process and to receive notifications.

The aim of this guide is to:

1. Explain the information required to complete the company registration form; and
2. Provide information on how to submit the EMR company registration form to the EMR Delivery Body for verification and to complete the company registration process.

**Note:** The CfD registration form will only be made available following an announcement by the EMR Delivery Body website, which will also be posted on the main Allocation Round 4 website, on the commencement of registration process for CfDs, once other CfD Round dates are formalised by the Department for Business, Energy & Industrial Strategy (BEIS).

In the meantime, if you have any queries regarding your CfD registration, please contact a member of the CfD Delivery Body Team on 01926 655300 or email [box.emr.cfd@nationalgrid.com](mailto:box.emr.cfd@nationalgrid.com)



# 1. Introduction (2/3)

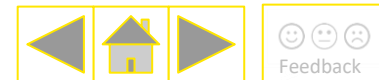
## 1.1 Overview of information required for EMR Company Registration

The following information is required to complete the EMR Company Registration form:

- **Company/organisation details**  
The relevant details for the company or organisation wishing to register, including company name, registered address and company registration number.
- **Authorised Person details**  
The Authorised Person should be named as an active company Director or company secretary as registered with Companies House for UK registered companies (or an equivalent body for non-UK registered companies).



# 1. Introduction (3/3)



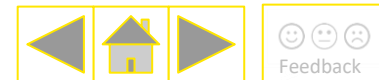
## 1.2 Main Admin

The Main Admin for each company should ordinarily be the person with managerial responsibility for the day-to-day participation in the Contracts for Difference mechanism.

1. The Main Admin will initially be responsible for the registering, editing and removal of other users within their organisation, and for the creation of other companies (sub-companies) if required. They will also act as the main point of contact for any communications with the Delivery Body.
2. Only Main Admins can edit user privileges on the EMR DB Portal for all the relevant users linked to their company. If a person leaves the company, it is the responsibility of the Main Admin to deactivate them on the EMR DB Portal.
3. It is permissible for the Main Admin of a registered company or organisation to be the same person as the Authorised Person.



## 2. How to register your company (1/3)



### Accessing and completing the registration form – Instructions

1. Go to the [EMR Delivery Body portal](#) and click on Contracts for Difference, shown in figure 1.0 below.

**Note:** Applicants who wish to participate in both Contracts for Difference and the Capacity Market will need to register their company for both schemes separately. Please note that the same Unit cannot participate in both schemes.

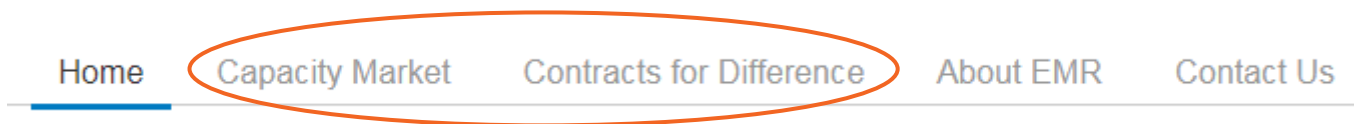
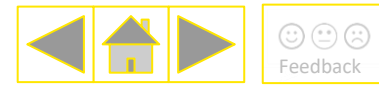


Figure 1.0: EMR Delivery Body Portal homepage



## 2. How to register your company (2/3)



2. You will navigate to Contracts for Difference landing page (*shown in the image below*).

Registration Forms can be auto populated using your Company Registration Number.  
Go to the next page to find out how.

### For CfD registration:

- Go to the left-hand menu on the CfD Home Page
- *Company Registration*

[CfD Home Page](#)

[CfD Overview](#)

[The CfD Process](#) ▶

[Document Library](#) ▶

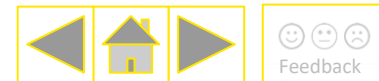
[Subscribe for updates](#)

[Company Registration](#)

*Company Registration Link*



## 2. How to register your company (3/3)



3. Company Registration forms can be auto populated using your company registration number or they can be completed manually.
4. To auto populate your Registration form, go to the 'Company Section' at the bottom of the page and select '**Yes**'.
5. Enter your company registration number and press 'Fetch Company Data'. Move to page 11.
6. To manually fill out the Company Registration form, go to the Company Section and select '**No**'. Move to page 13 for guidance on [Manual Registration](#)

### Company Section

Is this company registered at Companies House UK?\* ☒ Yes

☐ No (If No, you will be required to fill in the form manually)

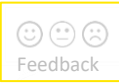
Please enter the Company Registration Number \* :

Fetch Company Data

*Company Registration form*



## 2. How to register your company – Auto populate (1/2)



1. The Company Registration form will appear with the Company Section populated using data taken from Companies House.
2. Select an Authorised Person from the drop down list. This section will also be partially populated. Enter the relevant mobile number and email address.

### Company Section

Is this company registered at Companies House UK? \* ☒ Yes

☐ No (If No, you will be required to fill in the form manually)

Please enter the Company Registration Number \* :

[Fetch Company Data](#)

Company Name \*

Company Registration Type

Address 1 \*

Address 2

Address 3

City/Town \*

Country \*

Post code \*

### Authorised Person Section

Authorised Person Name \*

Landline Number

Role/Position \*

Country \*

Mobile Number \*

Email Address \*

Address 1 \*

Address 2

Address 3

City/Town \*

Country Code \*

Confirm Mobile Number \*

Confirm Email Address \*

[Copy Company Address](#)

Post Code \*

*Company registration form*

*Company registration form*



## 2. How to register your company – Auto populate (2/2)



- 3) Fill out the Main Company Admin User Section. This can be the same person as the Authorised Person. If this is the case, select 'Copy Authorised Person Address'.
- 4) Click 'Submit'.
- 5) A 'Confirmation' pop up window with your details will appear.
- 6) Press OK to continue.

### Main Company Admin User Section

First Name *	<input type="text" value="Anna"/>	Last Name *	<input type="text" value="Smith"/>
Landline Number	<input type="text" value="01926650000"/>		
Country *	<input type="text" value="United Kingdom"/>	Country Code *	<input type="text" value="Unite"/>
Mobile Number *	<input type="text" value="07770000000"/>	Confirm Mobile Number *	<input type="text" value="07770000000"/>
Email Address *	<input type="text" value="Anna.Smith@nationalgrid1.com"/>	Confirm Email Address *	<input type="text" value="Anna.Smith@nationalgrid1.com"/>
Address 1 *	<input type="text" value="National Grid House"/>	<input type="button" value="Copy Authorised Person Address"/>	
Address 2	<input type="text" value="Warwick Technology Park"/>		
Address 3	<input type="text" value="Gallows Hill"/>		
City/Town *	<input type="text" value="Warwick"/>	Post Code *	<input type="text" value="CV34 6DA"/>
	<input type="button" value="Cancel"/>	<input type="button" value="Submit"/>	

### Confirmation

Please confirm if the below details are correct for Authorised Person:

Email Address: XXXXXXXX  
Mobile Number: XXXXXXXX

Please ensure that you complete the process within **7 calendar days**. The company registration will be cancelled if no action is taken by **24/03/2021**.

Click OK to continue or Cancel to go back to the previous screen.

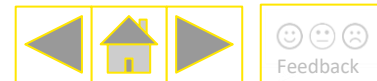
OK

Cancel

*Confirmation Pop Up*



## 2. How to register your company – Manually (1/5)



1. If you clicked 'No' on the Company Section page, you will be navigated to the Company Registration form (*shown in the image opposite*) and will need to complete the Company Registration form manually.

### Company Section

Company Name *	Company Registration Number
<input type="text"/>	<input type="text"/>
Company Registration Type	
<input type="text"/>	
Address 1 *	
<input type="text"/>	
Address 2	
<input type="text"/>	
Address 3	
<input type="text"/>	
City/Town *	Post code *
<input type="text"/>	<input type="text"/>
Country *	
<input type="text" value="United Kingdom"/>	

### Authorised Person Section

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Landline Number	Email Address *
<input type="text"/>	<input type="text"/>
Role/Position *	
<input type="text"/>	
Address 1 *	<input type="button" value="Copy Company Address"/>
<input type="text"/>	
Address 2	
<input type="text"/>	
Address 3	
<input type="text"/>	
City/Town *	Post Code *
<input type="text"/>	<input type="text"/>
Country *	
<input type="text" value="United Kingdom"/>	

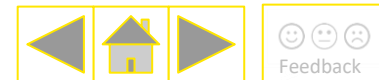
2. The form consists of three sub-sections:

- Company section
- Authorised Person section
- Main company admin user section (shown overleaf)

*Company registration form (1/2)*



## 2. How to register your company – Manually (2/5)



3. Once you have completed all the cells, click the 'Submit' button.  
Read on for specific guidance on completing the form manually.

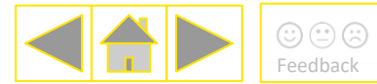
**Main Company Admin User Section**

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Landline Number	
<input type="text"/>	
Country *	Country Code *
<input type="text" value="United Kingdom"/>	<input type="text" value="44"/>
Mobile Number *	Confirm Mobile Number *
<input type="text"/>	<input type="text"/>
Email Address *	Confirm Email Address *
<input type="text"/>	<input type="text"/>
Address 1 *	<input type="button" value="Copy Authorised Person Address"/>
<input type="text"/>	
Address 2	
<input type="text"/>	
Address 3	
<input type="text"/>	
City/Town *	Post Code *
<input type="text"/>	<input type="text"/>

*Company registration form (2/2)*



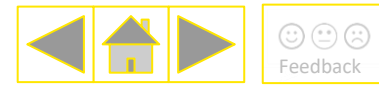
## 2. How to register your company – Manually (3/5)



4. All fields in the Company Registration form must be completed with the required information.
5. Fields marked with an asterisk are mandatory fields.
6. Company names should precisely match the description as held at Companies House or, for non-companies, on any relevant register. This includes abbreviations, e.g. Limited as opposed to Ltd.
7. A Company Registration Number (CRN) needs to be provided if you are an incorporated body. A CRN (sometimes referred to as a Companies House Number) is a unique number issued by Companies House when a limited company or Limited Liability Partnership (LLP) is incorporated.
8. Where your company is located in the United Kingdom, your CRN will consist of eight numbers, or two letters followed by six numbers. It will be displayed on your Certificate of Incorporation and it will also appear on the public register next to your company details.
9. Where your company is not located in the United Kingdom, there is no specific format for the CRN but you must provide the relevant reference.



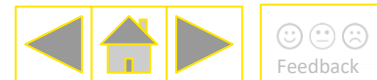
## 2. How to register your company – Manually (4/5)



10. You cannot choose or change your CRN. It will be generated by Companies House on a sequential basis depending on your country of incorporation and the type of company you are setting up:
- Companies formed in England and Wales have CRNs beginning with 0 (zero) or 1 (one)
  - Scottish companies are given CRNs with the prefix 'SC'
  - Limited Liability Partnerships (LLPs) are issued with CRNs beginning with 'OC'
  - Scottish LLPs have CRNs beginning with 'SO'



## 2. How to register your company – Manually (5/5)



If you are a non-listed company for the following types, then you need to provide the relevant evidence as detailed below:

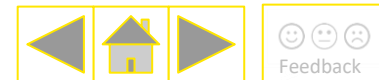
- Joint Venture (JV) – a JV agreement/structure chart or a letter signed by the Directors on letter headed paper to state that he/she is a Director for the organization;
- Partnership – a letter signed by the partner on letter headed paper to state that he/she is a partner/owner of the organization;
- Community Project/Charity – a letter signed by the head of the organisation on letter headed paper to state that he/she has the relevant decision-making authority.

NB: Foreign companies that legally own or control a CfD Unit (which must be located in Great Britain) can apply for a CfD and are therefore eligible for registration. To verify ownership or legal control of a CfD Unit, the foreign company can provide:

- A valid tax certificate; and/or
- A structure chart showing ownership or legal control of the holding company owning the CfD assets; and/or
- Letter signed by the Directors of the parent company;
- This information should be added to the scanned registration form prior to upload.  
Alternatively, the Delivery Body may request it via email.



### 3. Signing the Registration Form (1/4)



- 1) An email will be sent to the Authorised Person and an acknowledgement email to the Main Admin requesting for the Authorised Person to 'sign' the Registration Form, i.e. authorise the Registration request.
- 2) Click the 'Sign Registration Form' link contained in the email (*as shown in email below*).

Dear

NATIONAL GRID PLC has been registered on our portal. To complete the registration process, please click the link below and follow the instructions on screen to digitally sign the form:

[Sign Registration Form](#)

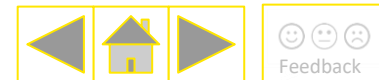
Please ensure that you complete the process within 7 calendar days. The company registration will be cancelled if the process is not completed by 29/03/2021.

Thank You,  
National Grid (ESO) - EMR Delivery Body

*Sign registration form link*



# 3. Signing the Registration Form (2/4)



- 3) Click the 'Generate/Resend OTP' button (*shown in the image below*).
- 4) An OTP (One Time Password) will be sent to the Authorised Person's mobile phone number as registered in the form and a confirmation pop up message will appear in green text (*shown in the image below*)
- 5) Enter your OTP into the cell and click the 'Submit OTP' button which will now be shaded in blue.

## Please Verify Your One-Time Password (OTP)

Please click on the Generate/Resend OTP button to generate OTP for verification. An OTP will be sent to your mobile number and you will need to enter the OTP in the text-box and click on Submit OTP button.

Please fill the OTP(One-Time Password) received on your Mobile Number (+44 XXXXXXXX44)\*:

Generate/Resend OTP

Submit OTP

Generate/Resend OTP

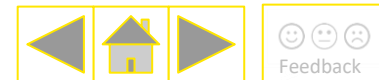
OTP has been sent to Mobile Number (+44 XXXXXXXX44)

*Click button to generate OTP*

OTP sent – confirmation text



### 3. Signing the Registration Form (3/4)



6. The Authorised Person is required to tick the declaration and enter their full name. Click the 'Sign' button (*shown in the image below*).

If you believe the information above is incorrect please contact the EMR Delivery Body. When you are ready to accept the completed application form, above, please tick the box below and sign the form by providing your full name in the text box below :

Signature

☐ I, being a director / authorised signatory of the above named applicant, HEREBY CERTIFY as at the date of this document, having made due and careful enquiry and to the best of my knowledge, information and belief that the information contained within this document is true and accurate.\*

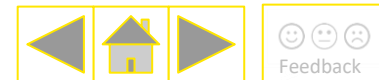
Full Name \*:

Date : 26/03/2021

*Authorised 'signature' to be completed*



### 3. Signing the Registration Form (4/4)



7. The completed form including date and signature will be displayed. Three option buttons will also appear. If you wish to proceed, click 'Submit' and then 'Ok' to confirm.

---

When you submit this form, the details will be sent to the EMR Delivery Body for review.

*Click 'Submit'*

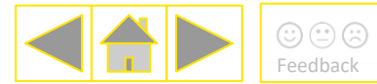
8. A confirmation message will appear and an email will be sent confirming your signed Registration request, see below. Please go to the [Post Assessment](#) page for next steps.

Thank you for completing the registration process with the EMR Delivery Body.

You will receive an email acknowledging your submission. We will be in touch with the Main Company Admin User for your company regarding the next steps.



## 4. EMR company registration verification (1/4)

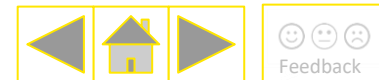


### Overview

- Once the Company Registration form has been submitted, the Delivery Body receives an automated email notification. To complete the verification process, the Delivery Body will check:
  - a) Company details against public records such as Companies House.
  - b) The Authorised Person is associated with the company for which the registration form has been submitted.
- Once the required verification checks have been completed by the Delivery Body, both the Main Admin and Authorised Person will receive an email confirmation of the outcome.
- If the details provided cannot be verified, both the Main Admin and the Authorised Person will receive an email confirmation that the company's registration request has been rejected by the Delivery Body, with an outline of the reasons for the rejection.
- If there are any issues that arise during the examination of the registration request, the Delivery Body will contact the main company administrator in the first instance.



## 4. EMR company registration verification (2/4)



### Post Delivery Body assessment

1. After the Delivery Body has assessed the Company Registration form, the Main Admin will be notified of the outcome via email. The Authorised Person will also be copied into this email.  
(shown in the image below)

NB: This is an automated email. Do not reply to it. If the company registration is rejected, the reason(s) for rejection will be in the Comment section. If you require further information, please contact: [emr.cfd@nationalgrideso.com](mailto:emr.cfd@nationalgrideso.com)

#### EXT || Company Registration Status has changed

Dear XXXXXX

Company XXXXXXXXXXXX has been Approved.

Comment:

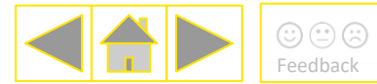
EMR Delivery Body 22/03/2021

Thank You,

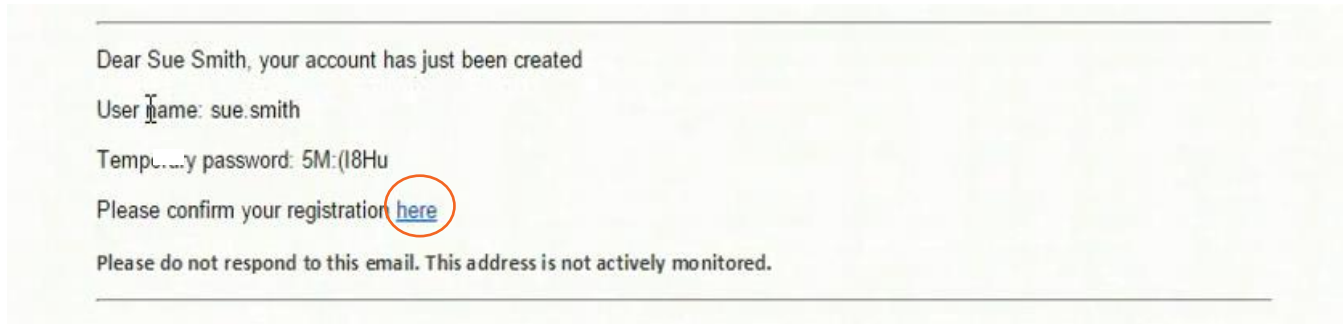
National Grid (ESO) - EMR Delivery Body



## 4. EMR company registration verification (3/4)



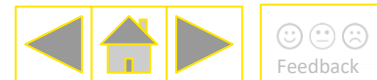
- Following approval of the Company Registration form by the Delivery Body, the Main Admin will receive an email containing their user name and temporary password, as well as a link to the portal where they can reset their password (*shown in the image below*).
- The Main Admin should click on the link in the email to confirm registration.



*Email – login details and link*



## 4. EMR company registration verification (4/4)



4. This navigates you to the Main Admin to the 'Confirm your registration' screen on the EMR Portal (*shown in the image below*).

**Confirm your registration**

Please enter your username and temporary password received via Email

Username: sue.smith

Temporary password

New password

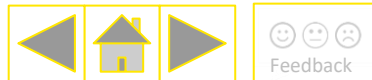
Confirm password

**Next >**

*Confirm your registration screen*



## 5. Confirming user registration details (1/4)



### Instructions

1. In order to proceed, the Main Admin must then complete all of the following fields on the 'Confirm your registration' screen (*shown in the image below*):
  - a) **User name** – Enter the user name provided in the email.
  - b) **Temporary password** – Enter the temporary password provided in the email.
  - c) **New password** – Choose a new password which should have at least 12 characters including one upper case character, one lower case character and one numeric or special character (! \$#%?=. \*[-^&\*()\_+|~='{}]:";'<>./]).  
**Note:** Please do not use any special characters other than those listed above.
  - d) **Confirm password** – Re-enter the new password.
2. The Main Admin enters all the required information and clicks the 'Next' button.

**Confirm your registration**

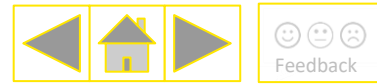
Please enter your username and temporary password received via Email

**Next >**

*Confirm your registration screen*



## 5. Confirming user registration details (2/4)



- This navigates the Main Admin to the next screen where they will then be asked to enter their PIN (*shown in the image below*). This PIN will be sent to the mobile number which the Main Admin provided in the Company Registration form.

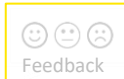
*Confirm your registration screen – Enter PIN*

- After the PIN is entered, the Main Admin will receive a confirmation message stating: 'Your new credentials have been registered'. A 'Go to Log in' link appears on the screen through which the Main Admin can log into their account.

*New credentials registered*



## 5. Confirming user registration details (3/4)



5. After clicking on the 'Log in' link, the Main Admin will be navigated to a 'Sign in' screen where they will need to enter their user name and password (which they have reset in steps 1-2).
6. After entering the user name and password, the Main Admin will be navigated to the 'Submit PIN' screen (*shown in the image below*).

Sign in please

Please sign in with credentials provided by your administrator.

UserName

Password

Sign In

[Forgot password](#) | [Forgot username](#) | [Forgot pin](#)

Sign in details

Sign in please

Please enter sms code.

PIN Code

☐ I'm not a robot

reCAPTCHA  
Privacy - Terms

Submit PIN

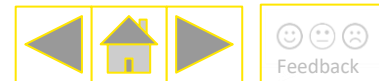
[Forgot pin](#)

Submit PIN screen

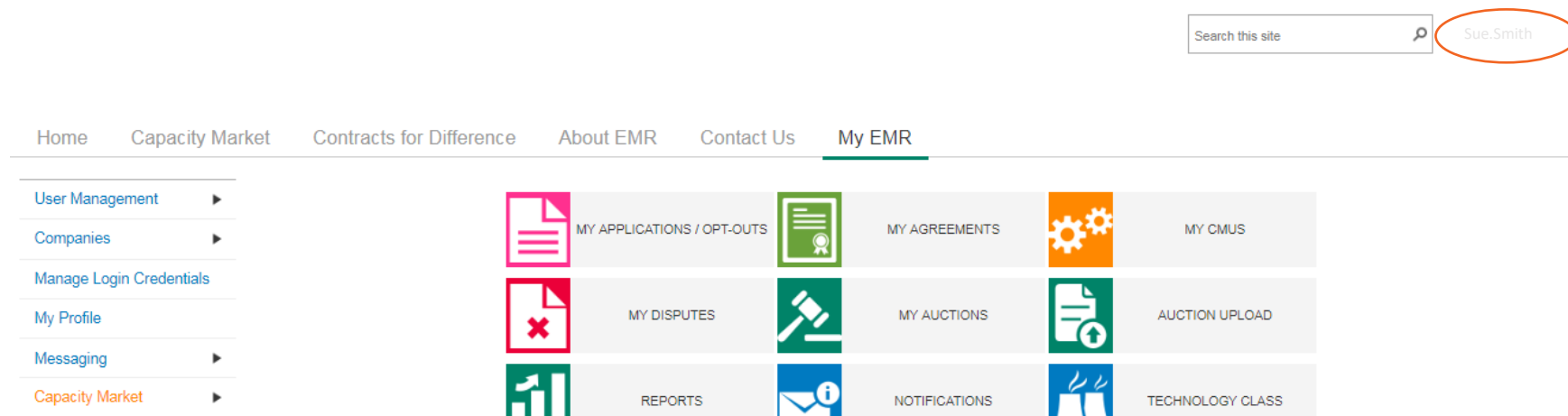
**Note:** you will need to select 'I'm not a robot' to gain reCAPTCHA approval, and then you can Submit PIN.



## 5. Confirming user registration details (4/4)



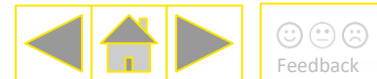
7. Once the PIN has been submitted, the Main Admin is successfully logged into the EMR Portal. The user name will appear on the top right hand side of this screen (*shown in the image below*).



*'My EMR' Screen (after successful registration)*



## 6. User management and privileges (1/8)



### Overview

The Main Admin can register additional users called EP users (external party users) who are able to log in to their company's area of the admin system and carry out specific 'roles'. Each of these EP users must be given privileges to carry out specific roles.

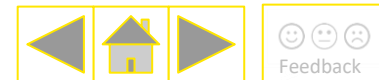
### The Main Admin can register the following types of EP users:

**(1) Deputy Main Admin** – The Deputy Main Admin has the same privileges as the Main Admin. They can create CfD Applications and add other users and can also make amendments to existing data.

**(2) Other EP users** – These users can act on behalf of a main company or sub-companies where they have been assigned the relevant privileges. Unlike the Main Admin or Deputy Main Admin, they cannot create, amend or delete any companies or login IDs.



## 6. User management and privileges (2/8)



### Privileges

Privileges can be assigned to EP users to enable them to carry out specific tasks for a company or multiple sub-companies. The different privileges are:

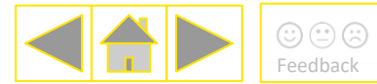
Privileges	Meaning
Viewer	The user can only view data and information
Operator	The user can create and edit data including Applications
Approver	The user can approve data and Applications

Viewer is the basic or default level of privilege which is applicable to all EP users.

The Main Admin or Deputy Main Admin can assign more privileges to an EP user by ticking the box next to the privilege.



## 6. User management and privileges (3/8)



### Managing your users

1. The Main Admin can view all of the relevant users linked to their company. To do this, click on 'My EMR'.
2. Next click on 'User Management' in the left-hand side menu. At this stage, because the Main Admin has not set up any additional users, only one user is visible in the users' grid (*shown in the image below*).

The screenshot shows the 'My EMR' page with the 'User Management' section active. The left sidebar has 'Add New EP User' highlighted. The main area displays a table with one user, Sue Smith, and a search bar.

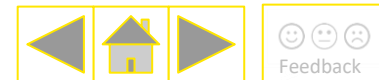
First name	Last name	User name	User type	Manage	Assign User
Sue	Smith	sue.smith	External Party User		

Showing 1 to 1 of 1 entries

*Users' grid on 'User Management' screen*



## 6. User management and privileges (4/8)



3. To create more users, click on 'Add New EP User' under 'User Management' on the left-hand side menu. This will bring up a new user management screen (*shown in the image below*).

**User management**

Team\*

First Name\*

Last Name\*

Email address\*

Confirm email address\*

Country\*

Country code\*

Mobile number\*

Confirm mobile number\*

Landline number

Role\*

Authorised Individual ☐

Agent ☐

Operator ☐

Approver ☐

Viewer ☒

Privileges

Status

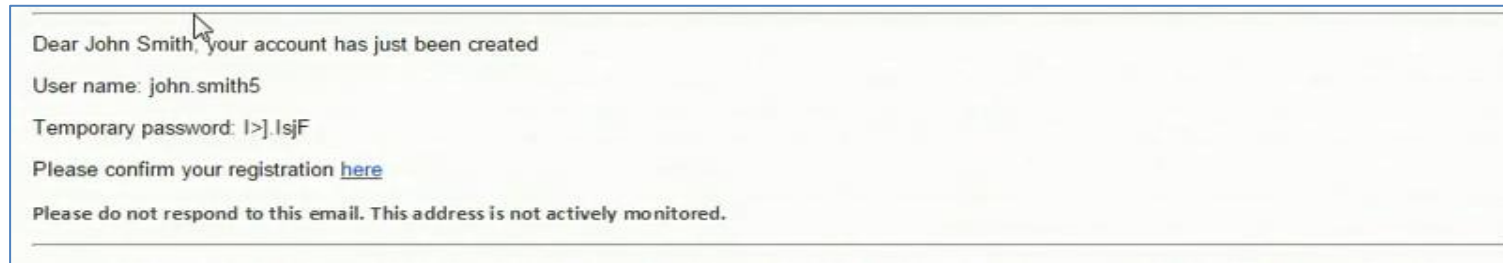
*'New User Management' screen*

4. Enter contact details for EP users and assign roles and privileges to them by selecting drop-down menus and checking boxes.



## 6. User management and privileges (5/8)

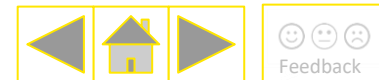
5. Click on 'User Management' in the left-hand side menu. The newly created user will now be visible in the table.
6. Once the Main Admin has successfully registered a new EP user, this new EP user will receive a registration confirmation email. The email will contain their user name and temporary password, similar to the email received by the Main Admin after company registration (*shown in the image below*).



*Registration confirmation email to new EP user*



## 6. User management and privileges (6/8)



### Editing users on the EMR Portal

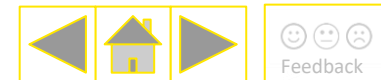
1. Only Main Admins can edit user privileges on the EMR DB Portal for all the relevant users linked to their company. If a user leaves the company, it is the responsibility of the Main Admin to deactivate the person on the EMR DB Portal.
2. Click on 'User Management' in the left-hand side menu of the EMR Portal. Then click 'Manage' on the person's name that you wish to edit (*shown in the image below*).

User management				
Show 10 entries				
First name	Last name	User name	User type	
c	epmainadmin	c.epmainadmin	Main Admin	Manage

*Users' grid on 'User Management' screen*



## 6. User management and privileges (7/8)



3. Here you can amend the following:
  - **Personal details:** name, telephone numbers, email address
  - **Role:** Main Admin, Deputy Main Admin, user
  - **Privileges:** operator, approver, viewer
  - **Status:** active or deactivated
4. Once the relevant changes have been made, click 'Save Changes' (*shown in the image below*).
5. A Main Admin is able to deactivate their own account in the EMR DB Portal but they cannot reactivate it themselves and neither can the Authorised Person. Another Main Admin would be required to reactivate it if necessary.
6. If a Main Admin attempts to deactivate themselves, a warning message would appear asking them to confirm that they definitely wish to proceed.

**User management**

Team*	CM ▼
First Name*	test
Email address*	test@nationalgrid.com
Country*	United Kingdom ▼
Mobile number*	1234567890
Landline number	
Role*	Main Admin ▼
Authorised Individual	<input type="checkbox"/>
Agent	<input type="checkbox"/>
Privileges	Operator <input checked="" type="checkbox"/> Approver <input checked="" type="checkbox"/> Viewer <input checked="" type="checkbox"/>
Status	Active ▼

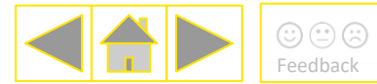
\* Required field

Cancel Save Changes

*'User Management' screen*



## 6. User management and privileges (8/8)



### Updating an Authorised Person

1. A Main Admin does not have the privileges to update the details of an Authorised Person in the EMR Portal. To do this, the Main Admin must send an email to the Delivery Body at [emr@nationalgrideso.com](mailto:emr@nationalgrideso.com) requesting the change and providing full details of the new Authorised Person.
2. The new Authorised Person should be named as an active company Director or company secretary as registered with Companies House for UK registered companies (or an equivalent body for non-UK registered companies).
3. The new Authorised Person must be copied into the email to the Delivery Body requesting the change.
4. The Delivery Body will make the update and inform the Main Admin by email once the update has been made in the EMR Portal.



# 7. Assigning users to companies (1/2)

1. After logging in, click on 'My EMR' and then click on 'User Management' in the left-hand side menu. This will display all the users which have been created (*shown in the image below*).
2. Click on 'Assign User' on the right-hand side of the screen for the user you want to associate with a company or sub-company.



**User management**

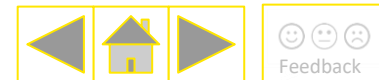
Show  entries

First name	Last name	User name	User type	Manage	Assign User
John	Smith	john.smith2	External Party User	Manage	Assign User
Sue	Smith	sue.smith	External Party User	Manage	Assign User

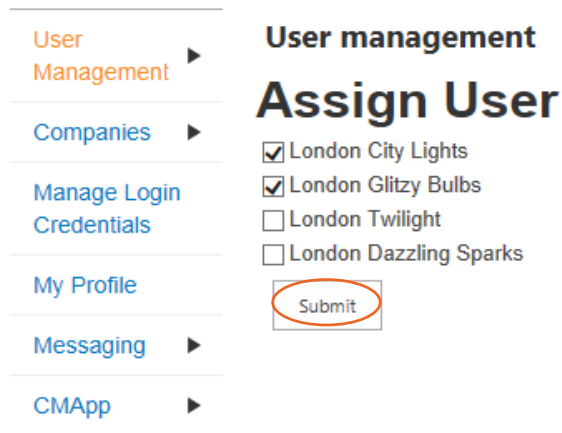
'User management' screen



## 7. Assigning users to companies (2/2)



3. This will navigate you to the 'Assign User' screen with a list of companies (*shown in the image below*).
4. Select the companies for which the new EP user should be associated with and select 'Submit'.



*'Assign User' screen*



## 8. Managing passwords (1/2)

Once a user is active in the system, their password can then be changed.

### 9.1 – Instructions

1. User should log into the portal and navigate to 'My EMR'.
2. Click on 'Manage Login Credentials' in the menu on the left-hand side (*shown in the image below*).

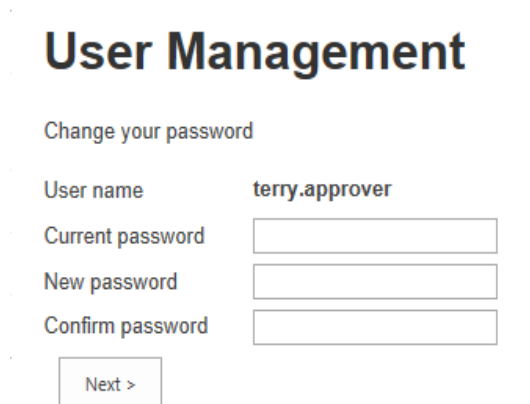


*'My EMR' screen – 'Manage Login Credentials'*



## 8. Managing passwords (2/2)

3. This navigates to a form for changing your password (*shown in the image below*).
4. To change your password, enter your current password and the desired new password under both 'New password' and 'Confirm password' (ensuring these match).
5. Click on 'Submit'. This will send a message confirming that the password has been changed.



**User Management**

Change your password

User name      terry.approver

Current password     

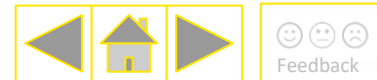
New password     

Confirm password     

*Change your password screen*



## 9. Change of company name (1/2)



Once your company is registered in the EMR Portal, you can change the name of the company by sending an email to the Delivery Body from the Main Admin.

- You must include the old company name with the NGRID number (NGRID-XXXX) and the new company name you want to change it to.
- The new company name must be registered on [Companies House](#)
- The company Director must be active on Companies House and **must be copied into the request email.**



## 9. Change of company name (2/2)

- A 'Certificate of Incorporation on Change of Name' showing the name change must be attached to the email (*shown in the image below*).
- Please make sure the company registration number on this document matches exactly with the company registration number on Companies House.



Once the Delivery Body receives the email, the system will be updated to reflect the new company name and you will be advised when it has been done.

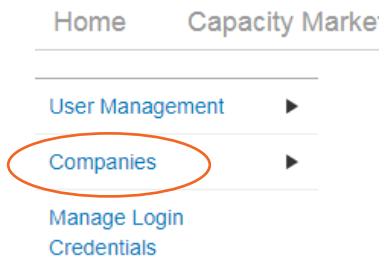


# 9. Change of company address

Once you have registered your company, you are able to change the address details.

**Note:** Only Main Admins can complete this step.

1. The user should log in to the EMR Portal and navigate to 'My EMR'.
2. Click on 'Companies' in the menu on the left-hand side (*shown in the image below*).
3. Find the relevant company under 'Company List' and select 'Edit' (*shown in the image below*).
4. Amend the address details and then select 'Submit'.



'My EMR' screen – 'Companies'

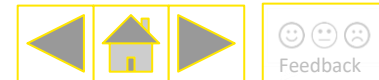
Status	Additional info	Detail	Edit
Approved	Additional info	Details	Edit
Approved	Additional info	Details	Edit
Approved	Additional info	Details	Edit
Approved	Additional info	Details	Edit

Previous 1 Next

Figure 11.2: Company List



## 9. Contact details



In the event you have any questions regarding the company registration and user management process, you can contact us on:

### **Contracts for Difference team**

Telephone: 01926 655300

Email: [.box.emr.cfd@nationalgrid.com](mailto:.box.emr.cfd@nationalgrid.com)





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