

G19 – EMR Settlement Portal User Guide

EMRS Guidance Document

Public

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1. 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 and terms and conditions review |

2. Introduction

The EMR Settlement Portal (Portal) provides a safe and secure environment for EMR Parties to easily view, download, save and print their settlement files. The 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. The Portal is an additional channel for accessing settlement files.

3. Purpose

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

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

4. Who 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 Portal, and in the material published on it

5. Associated Documents

This document should be read in conjunction with:

- WP31 - Amending EMR Party Details¹
- G4 – EMR Settlement Authorisations²

6. Who can have access to the Portal?

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

- Primary Authority
- Finance Authority

¹ <https://emrsettlement.co.uk/publications/working-practices/>

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

- Operating Authority
- Finance contacts

If you wish to amend the authorised roles for your organisation and therefore who has access to the Portal, please follow the process set out in WP32 – Amending EMR Party Details³.

Please inform EMRS immediately if a registered user leaves your organisation and therefore should not be an Authorised User or have access to the Portal. Without notification (via an amendment form), existing registered users of the portal will retain access to the Portal and therefore the data for your organisation.

Please note access to the Portal is granted when a user is registered as an authorised contact with EMRS. They may therefore have access to the 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.

7. How do I register?

Once EMRS has received and processed a registration or an amendment form for an EMR Party, any new authorised contacts will receive an email inviting them to register for the Portal. Where a user is a registered and authorised contact for more than one EMR Party they will only need to register once and will be able to see settlement files for all EMR Parties with a single login.

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

- Provide your email address. This will be your user name and must match what was provided on the EMRS registration form 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.

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

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.

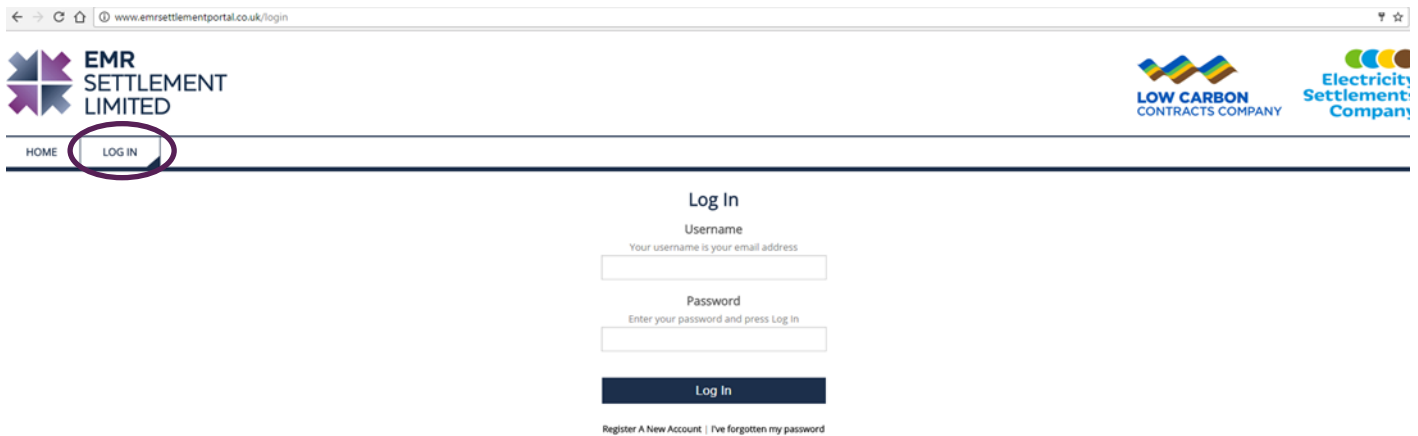


Once successful, you will be promoted to log in.

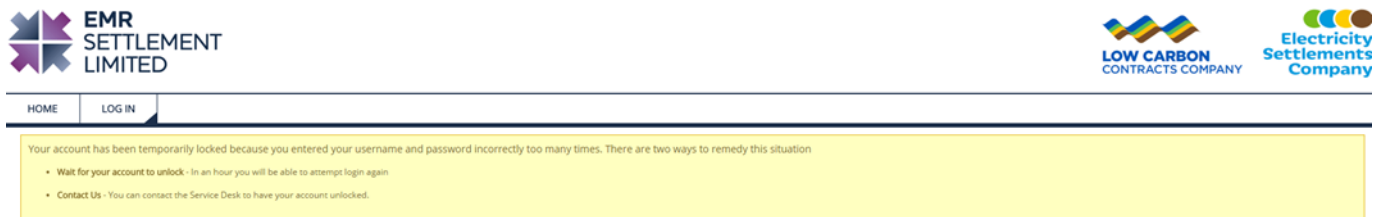
³ <https://emrsettlement.co.uk/publications/working-practices/>

8. How do I log in to the Portal?

Open a web browser (all recent versions of Internet Explorer, Google Chrome, Mozilla Firefox and Safari are supported) and navigate to 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.

9. 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 authorised contact for. To amend your associations please follow the process set out in WP32 – Amending EMR Party Details.

10. 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 WP32 – Amending EMR Party Details.

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"/> | Change Your Password |
| Your Display Name: | <input type="text" value="Joe Bloggs"/> | Change Your Display Name |
| Last Login: | 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.

11. How do I recover a forgotten password?

To reset your password: open a web browser and navigate to 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.

Log In

Username
Your username is your email address

Password
Enter your password and press Log In

[Log In](#)

[Register A New Account](#) [I've forgotten my password](#)

When prompted, enter your 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.

Forgotten Password

If you have forgotten your password, you can use this page to begin the three stage password reset process. Enter the email address associated with your account below. We will then send you an email with instructions for how to continue to the second stage, where you will be asked to answer the security question that you specified when you created your account.

Note: For security reasons, we will not tell you whether the email address that you entered was correct. If you have not received your password reset email within a few minutes, check your spam folder, or alternatively contact our site administrators.

Enter your email address here

Start Unlock Process

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 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.

12. How do I access my settlement files?

The Portal holds all issued settlement files produced after December 2015, i.e. invoices, Credit Notes, Notices, Credit Cover reports and Backing ata. 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 display 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"



< 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.

Calendar View Filter View

< Settlement File Downloads

2016

November

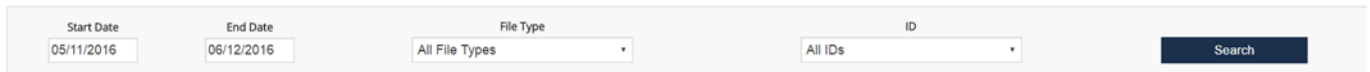
| M | T | W | T | F | S | S |
|----|----|----|----|----|----|----|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | | | | |

- All File Types
- Daily Files
- Monthly Files
- Quarterly Files
- Ad-Hoc Files
- Annual Files
- Other Periodicity

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 screenshot shows a search interface with the following elements: a 'Start Date' field containing '05/11/2016', an 'End Date' field containing '06/12/2016', a 'File Type' dropdown menu currently set to 'All File Types', an 'ID' dropdown menu currently set to 'All IDs', and a dark blue 'Search' button on the right.

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.

13. Is there any frequently asked questions?

There are a number of frequently asked questions available which provide information on how to use the 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.

14. Need more information?

If you would like any additional information or support with the Portal please email us at contact@emrsettlement.co.uk or call us on 020 7380 4333.

15. Acronyms and Definitions

A list of acronyms and definitions can be found in the 'Acronyms and Definition' document on our website⁴.

⁴ Acronyms and Definition available on the EMRS website: <https://emrsettlement.co.uk/publications/>

16. Appendix 1 – EMR Settlement Portal Terms & Conditions

Please read these terms and conditions carefully before using this site.

Terms of EMR Settlement Portal use

This terms of use (together with the documents referred to in it) tells you the terms of use on which you may make use of our Portal www.emrsettlementportal.co.uk (**our site or "Portal"**), whether as a guest or a registered user. Use of our site includes accessing, browsing, or registering to use our site.

Please read these terms of use carefully before you start to use our site, as these will apply to your use of our site. We recommend that you save a copy of this for future reference.

By using our site, you confirm that you accept these terms of use and that you agree to comply with them.

If you do not agree to these terms of use, you must not use our site.

Other applicable terms

These terms of use refer to the following additional terms, which also apply to your use of our site:

Our **Privacy Policy**, which sets out the terms on which we process any personal data we collect from you, or that you provide to us. By using our site, you consent to such processing and you warrant that all data provided by you is accurate.

Our **Cookie Policy**, which sets out information about the cookies on our site.

Information about us

www.emrsettlementportal.co.uk is a site operated by EMR Settlement Limited ("We"). We are registered in England and Wales under company number 8924703 and have our registered office at 4th Floor 350 Euston Road, London, NW1 3AW.

Changes to these terms

We may revise these terms of use at any time by amending this page.

Please check this page from time to time to take notice of any changes we have made, as they are binding on you.

Changes to our site

We may update our site from time to time, and may change the content at any time. However, please note that any of the content on our site may be out of date at any given time, and we are under no obligation to update it.

We do not guarantee that our site, or any content on it, will be free from errors or omissions.

Accessing our site

Our site is made available free of charge.

We do not guarantee that our site, or any content on it, will always be available or be uninterrupted. Access to our site is permitted on a temporary basis. We may suspend, withdraw, discontinue or change all or any part of our site without notice. We will not be liable to you if for any reason our site is unavailable at any time or for any period.

You are responsible for making all arrangements necessary for you to have access to our site.

You agree to inform us immediately when a registered user leaves your organisation and therefore should no longer have access to the Portal as a registered user.

You agree that where this information is not provided, existing registered users of the Portal may retain access to it until we are informed that their registered user status should be withdrawn.

You are also responsible for ensuring that all persons who access our site through your internet connection are aware of these terms of use and other applicable terms and conditions, and that they comply with them.

Intellectual property rights

We are the owner or the licensee of all intellectual property rights (including copyright) in our Portal, and in the material published on it. Those works are protected by copyright laws and treaties around the world. All such rights are reserved.

You may print off one copy, and may download extracts, of any page(s) from our Portal for your personal reference and you may draw the attention of others within your organisation to material posted on our Portal.

You must not modify the paper or digital copies of any materials you have printed off or downloaded in any way, and you must not use any illustrations, photographs, video or audio sequences or any graphics separately from any accompanying text.

Our status (and that of any identified contributors), as the authors of material on our Portal must always be acknowledged.

If you print off, copy or download any part of our site in breach of these terms of use, your right to use our Portal will cease immediately and you must, at our option, return or destroy any copies of the materials you have made.

Limitation of our liability

The material displayed on our Portal is provided without any guarantees, conditions or warranties as to its accuracy.

Commentary and other materials posted on our Portal are not intended to amount to advice on which reliance should be placed. We therefore disclaim all liability and responsibility arising from any reliance placed on such materials by any visitor to our site, or by anyone who may be informed of any of its contents.

No warranty is made as to the availability of this Portal, or that the functions used or materials accessible or downloaded from this Portal will be uninterrupted or free of errors, viruses or other harmful components.

Without limitation to the foregoing, to the extent permitted by law, we, other members of our group of companies and third parties connected to us hereby expressly exclude:

- All conditions, warranties and other terms which might otherwise be implied by statute, common law or the law of equity.
- Any liability for any direct, indirect or consequential loss or damage incurred by any user in connection with our Portal or in connection with the use, inability to use, or results of the use of our Portal, any websites linked to it and any materials posted on it, including, without limitation any liability for, loss of income or revenue, loss of business, loss of profits or contracts, loss of anticipated savings, loss of data, loss of goodwill, wasted management or office time; and
- for any other loss or damage of any kind, however arising and whether caused by tort (including negligence), breach of contract or otherwise, even if foreseeable, provided that this condition shall not prevent claims for loss of or damage to your tangible property or any other claims for direct financial loss that are not excluded by any of the categories set out above.
- The above exclusion does not affect our liability for death or personal injury arising from our negligence, our liability for fraudulent misrepresentation, or any other liability which cannot be excluded or limited under applicable law.

Uploading content to our site

Whenever you make use of a feature that allows you to upload material to our Portal, or to make contact with other users of our site, you must comply with the content standards set out in these terms. You warrant that any such contribution does comply with those standards, and you indemnify us for any breach of that warranty.

Unless otherwise expressly provided by us, any material you upload to our Portal will be considered non-confidential and non-proprietary, and we have the right to use, copy, distribute and disclose to third parties any such material for any purpose. We also have the right to disclose your identity to any third party who is claiming that any material posted or uploaded by you to our Portal constitutes a violation of their intellectual property rights, or of their right to privacy.

We will not be responsible, or liable to any third party, for the content or accuracy of any materials posted by you or any other user of our Portal.

We have the right to remove any material or posting you make on our Portal if, in our opinion, such material does not comply with the content standards set out in these terms.

Content standards

These content standards apply to any and all material which you contribute to our Portal (“contributions”), and to any interactive services associated with it.

You must comply with the spirit of the following standards as well as the letter. The standards apply to each part of any contribution as well as to its whole.

Contributions must: be accurate (where they state facts); be genuinely held (where they state opinions); comply with applicable English law and in any country from which they are posted.

Contributions must not: contain any material which is defamatory of any person; contain any material which is obscene, offensive, hateful or inflammatory; promote sexually explicit material; promote violence; promote discrimination based on race, sex, religion, nationality, disability, sexual orientation or age; infringe any copyright, database right or trade mark of any other person; be likely to deceive any person be made in breach of any legal duty owed to a third party, such as a contractual duty or a duty of confidence; promote any illegal activity; be threatening, abuse or invade another’s privacy, or cause annoyance, inconvenience or needless anxiety; be likely to harass, upset, embarrass, alarm or annoy any other person; be used to impersonate any person, or to misrepresent your identity or affiliation with any person; give the impression that they emanate from us, if this is not the case; advocate, promote or assist any unlawful act such as (by way of example only) copyright infringement or computer misuse.

Viruses

We do not guarantee that our site will be secure or free from bugs or viruses.

You are responsible for configuring your information technology, computer programmes and platform in order to access our site. You should use your own virus protection software.

You must not misuse our site by knowingly introducing viruses, trojans, worms, logic bombs or other material which is malicious or technologically harmful. You must not attempt to gain unauthorised access to our site, the server on which our site is stored or any server, computer or database connected to our site. You must not attack our site via a denial-of-service attack or a distributed denial-of service attack. By breaching this provision, you would commit a criminal offence under the Computer Misuse Act 1990. We will report any such breach to the relevant law enforcement authorities and we will co-operate with those authorities by disclosing your identity to them. In the event of such a breach, your right to use our site will cease immediately.

Linking to our site

You may link to our home page, provided you do so in a way that is fair and legal and does not damage our reputation or take advantage of it.

You must not establish a link in such a way as to suggest any form of association, approval or endorsement on our part where none exists.

You must not establish a link to our site in any website that is not owned by you.

Our site must not be framed on any other site, nor may you create a link to any part of our site other than the home page.

We reserve the right to withdraw linking permission without notice.

Third party links and resources in our site

Where our site contains links to other sites and resources provided by third parties, these links are provided for your information only.

We have no control over the contents of those sites or resources.

Applicable law

If you are a consumer, please note that these terms of use, its subject matter and its formation, are governed by English law. You and we both agree to that the courts of England and Wales will have non-exclusive jurisdiction. However, if you are a resident of Northern Ireland you may also bring proceedings in Northern Ireland, and if you are resident of Scotland, you may also bring proceedings in Scotland.

If you are a business, these terms of use, its subject matter and its formation (and any non-contractual disputes or claims) are governed by English law. We both agree to the exclusive jurisdiction of the courts of England and Wales.

Contact us

To contact us, please email contact@emrsettlement.co.uk. Thank you for visiting our site.

