# ERCOT CRR Account Holder MUI Qualification Process

New CRR Account Holders (CRRAHs) are required to qualify to use the Congestion Revenue Right (CRR) Market User Interface (MUI). This document details the steps to be completed by a CRRAH, and its Counter-Party (CP), in order for the CRRAH to qualify. Successfully completing the qualification process demonstrates that the CRRAH can participate in a CRR auction by doing the following:

* Having their CP submit a credit limit for the auction
* Having the CRRAH verify that the CP has allocated credit
* Downloading a CRR network model
* Uploading an auction portfolio
* Updating and submitting an auction portfolio
* Viewing Private and Public Messages posted for CRRAHs in the MUI
* Completing [CRR Market User Interface](https://www.ercot.com/services/training/courses/details?name=CRR-Market-User-Interface-WBT) web-based training
* Completing [Congestion Revenue Rights Market](https://www.ercot.com/services/training/courses/details?name=Congestion-Revenue-Rights-WBT) web-based training
* Subscribing to the Notice\_CRR distribution list

**Reference material (located at** <http://www.ercot.com/mktinfo/crr>**):**

* CRR MUI Upgrade FAQ
* CRR Market User Interface Handbook
* CRR Market User Interface Specifications
* CRR MUI Qualification Process and Scorecard

**Preconditions:**

The entity needs to have completed registration with ERCOT per the “Congestion Revenue Right (CRR) Account Holder Application for Registration” located at <https://www.ercot.com/mktrules/nprotocols/current>

* The entity must possess a valid Market Operations Test Environment (MOTE) Counter-Party Digital Certificate (DUNS number ending in 9999) and a valid MOTE CRR Account Holder Digital Certificate (DUNS number ending in 5000). If needed, registered User Security Administrators (USAs) can request certificates via email to [mpimdigitalcertadmin@ercot.com](mailto:mpimdigitalcertadmin@ercot.com) with the following roles assigned:

|  |  |  |
| --- | --- | --- |
| **Role** | **Description** | **Available to** |
| CP\_EXTRACTS | MIS access to certified artifacts | CRRCP |
| CRR\_EXTRACTS | MIS access to certified artifacts | CRRAH, CRRCP |
| MP\_CRR\_Account\_Holder | MIS access to CRR market activities; includes nominating, buying, selling or trading of CRRs | CRRAH |
| MP\_CRR\_Counterparty | MIS access to assign credit limit to upcoming CRR market activities | CRRCP |
| MP\_SETTLEMENTS | MIS eService access to create and find service requests and settlement disputes | CRRAH |

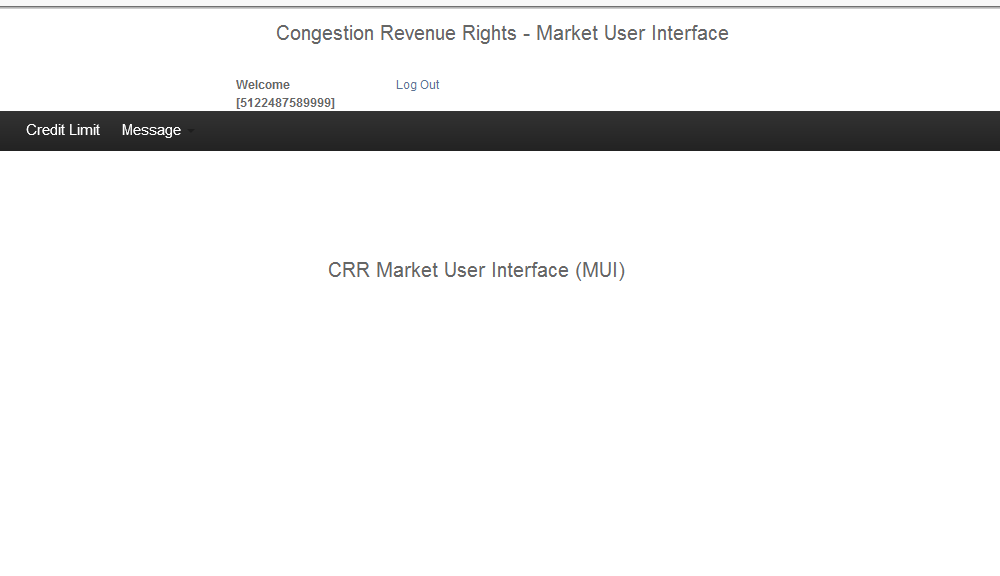
**Preparation:**

To start, obtain the sample CRR MUI Qualification Scorecard from the CRR MUI Qualification Process and Scorecard zip file located at <http://www.ercot.com/mktinfo/crr>.

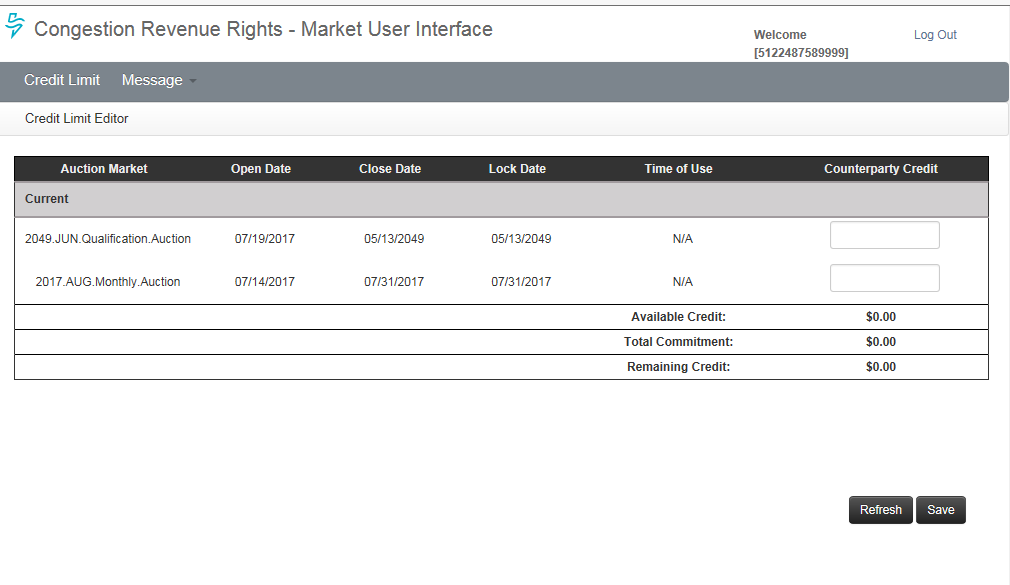
1. Fill out CRRAH and CP information in C3-C8, D4, and E4.
2. Save the file using the naming convention: [CRRAH short name]\_crr\_ qualification\_scorecard
3. Fill in cells C12-C20 with the dates each task was completed, adding any comments if needed in D12-D20.

**Task 1: Counter-Party submit credit limit**

1. Go to the following URL using your Counter-Party (CP) certificate ending in 9999: <https://testmis.ercot.com/mui-ercot-ihedge/>. *The following screen appears. (Note: if your Counter-Party DUNS does not appear on the landing page under Welcome, you have logged on with the wrong digital certificate. Ensure you are logged on with the digital certificate ending in ‘9999’.)*



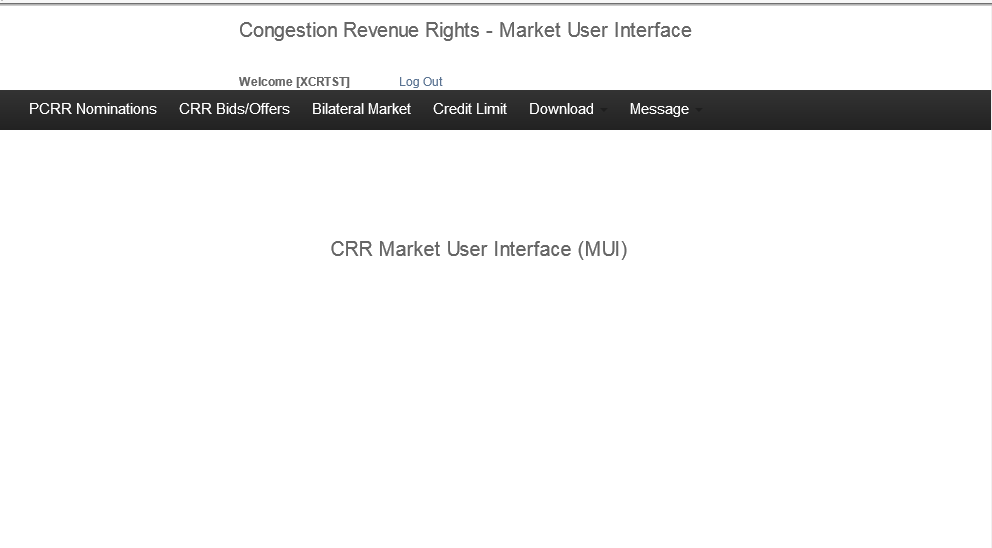
1. Click on the Credit Limit tab. *A similar screen to the one below appears. (Note that the auction information on your screen will be different than what is shown below. The screenshot below is for illustration purposes only).*



1. Enter 5,000,000 in the field corresponding with the 2049.JUN.Qualification.Auction.
2. Click the **Save** button.
3. Enter the date you completed this task in C12 on the Qualification Scorecard.

**Task 2: CRRAH verify CP has allocated credit**

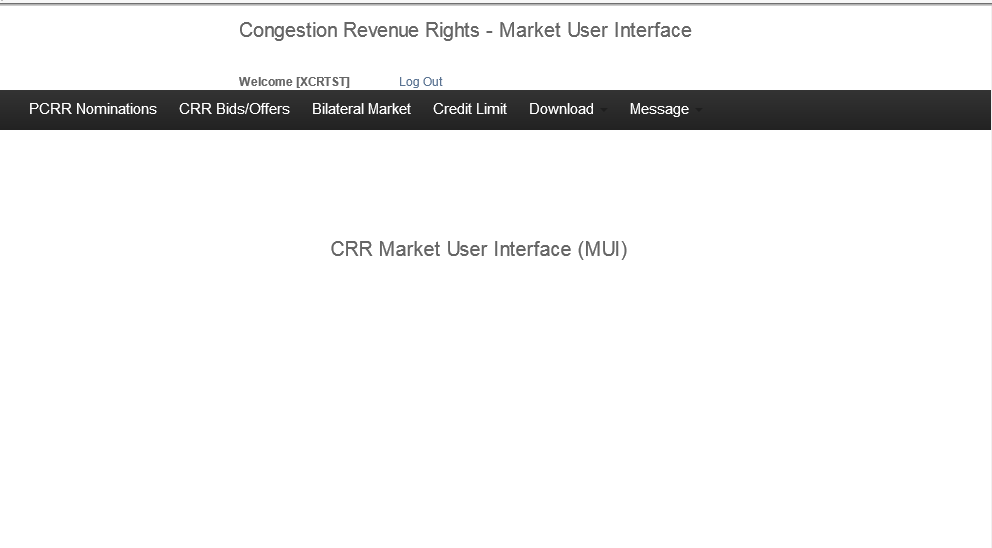
1. Go to the following URL using your CRRAH digital certificate ending in 5000: <https://testmis.ercot.com/mui-ercot-ihedge/>. *The following screen appears. Ensure that you are logged in with your CRRAH digital certificate by verifying your CRRAH short name appears above the menu bar next to Welcome.*



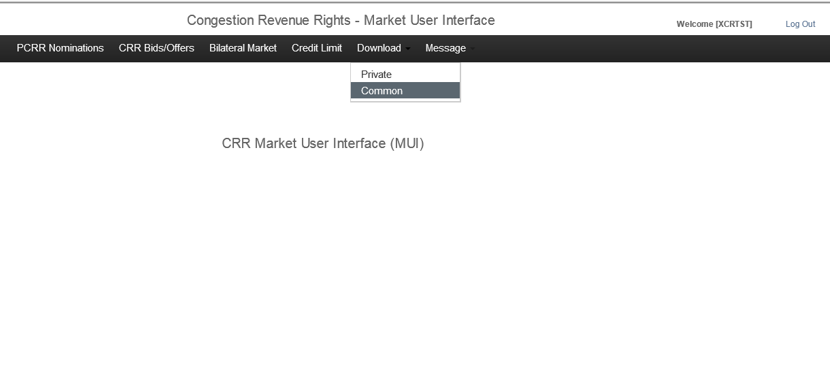
1. Click on the Credit Limit tab.
2. Confirm that $5,000,000 has been entered in the Counter-Party Credit column for the 2049.JUN.Qualification.Auction and attach a screenshot of this page to your email when submitting your Qualification Scorecard.
3. Enter the date you completed this task in C13 on the Qualification Scorecard.

**Task 3: Download CRR network model**

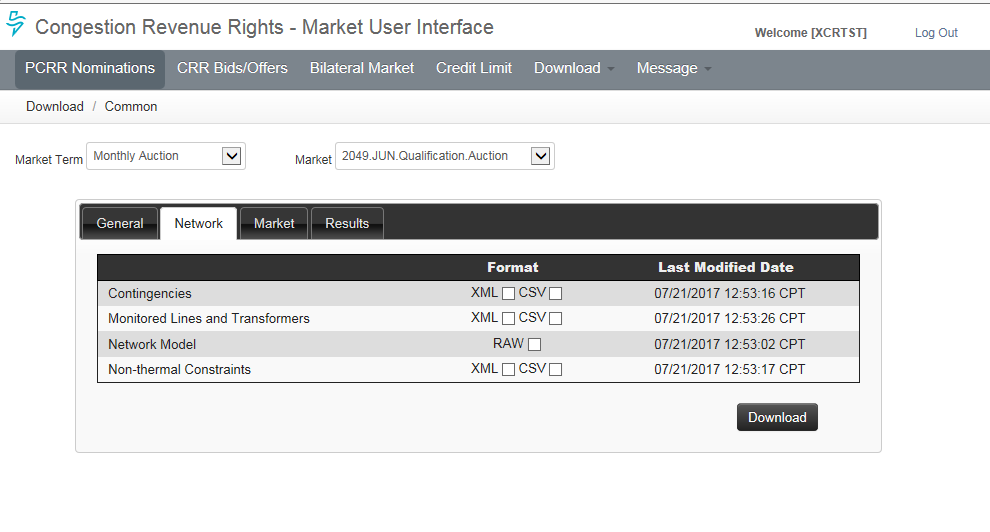
1. Go to the following URL using your CRRAH digital certificate ending in 5000: <https://testmis.ercot.com/mui-ercot-ihedge/>. *The following screen appears.*



1. Click on the Download tab, and select Common from the Download menu.



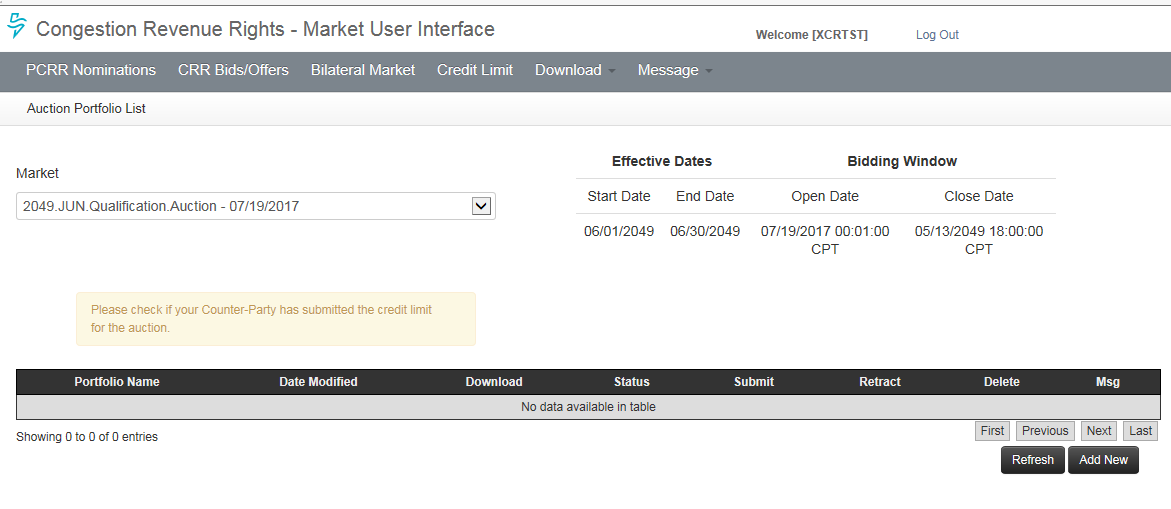
1. Click on the Network tab and then choose the following filter:
   1. Market Term = Monthly Auction
   2. Market = 2049.JUN.Qualification.Auction



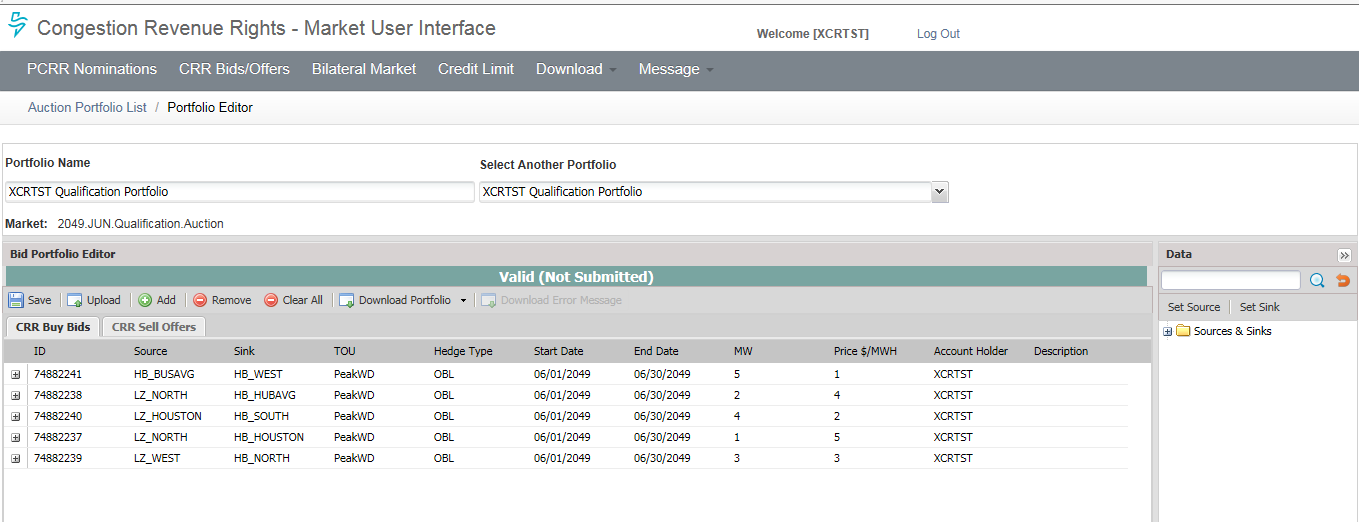
1. Download the Network Model by selecting the check box next to RAW in the Format column and clicking on the Download button. When prompted to Open or Save commondownload.zip, click Save, and then click Open folder. This creates a zip file containing three network model files, one for each time of use. Attach the **PeakWD** network model file in RAW format to your email when submitting your Qualification Scorecard.
2. Enter the date you completed this task in C14 on the Qualification Scorecard.

**Task 4: Upload auction portfolio:**

1. Download and save the file CRR MUI Qualification Portfolio.csv from the CRR MUI Qualification Process and Scorecard zip file located at <http://www.ercot.com/mktinfo/crr>.
2. Replace XSHORTNAME in column C with the CRRAH short name and resave (as a .csv file).
3. Go to the following URL using your CRRAH digital certificate ending in 5000: <https://testmis.ercot.com/mui-ercot-ihedge/>.
4. Click on the CRR Bids/Offers tab.
5. Select the 2049.JUN.Qualification.Auction from the Market filter.



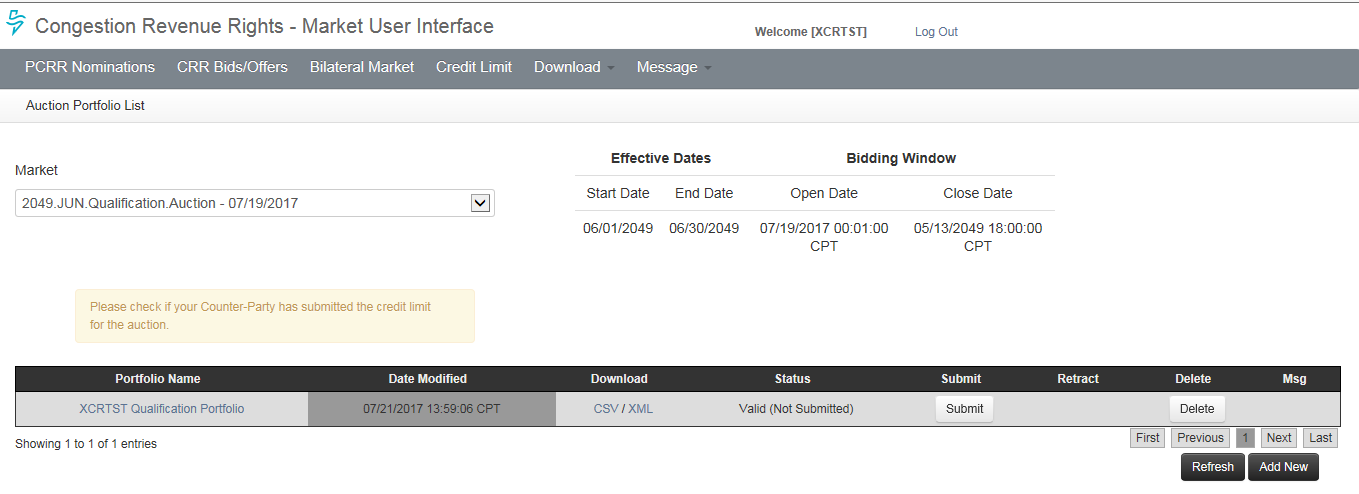
1. Click on Add New, browse to find the CRR MUI Qualification Portfolio.csv file, and click Open to select it.
2. Tab or click out of the field to validate the portfolio name.
3. Click on the Create Portfolio button. You should receive a message that your portfolio has been created successfully and all 5 records passed validation.
4. Click ok. You will be directed to the Bid Portfolio Editor screen.



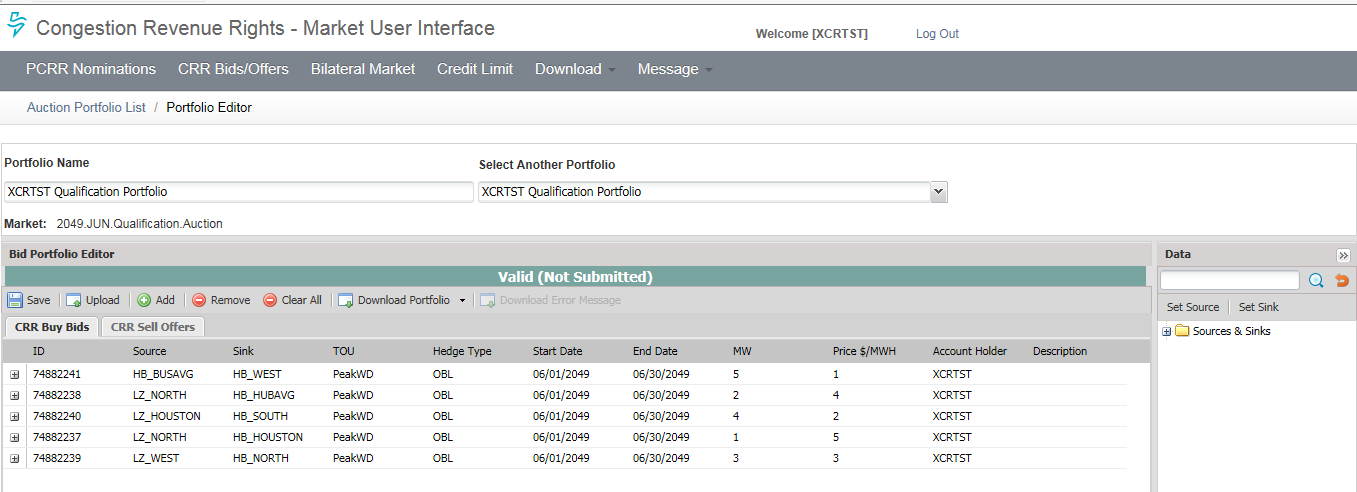
1. Enter the date you completed this task in C15 on the Qualification Scorecard.

**Task 5: Edit/save/submit auction portfolio**

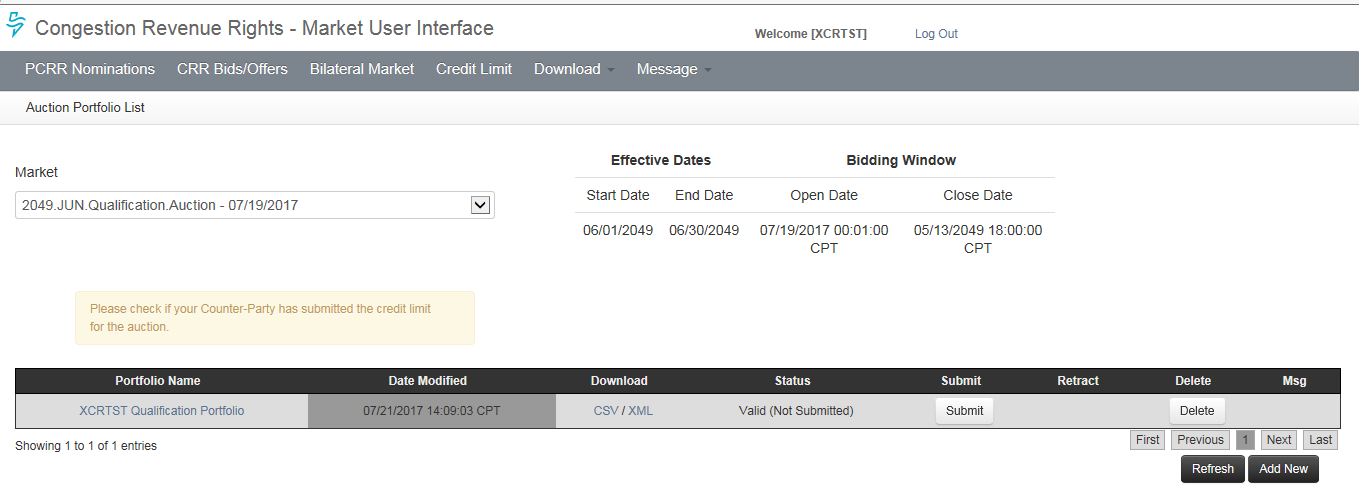
1. Navigate to the Auction Portfolio List screen by clicking on the CRR Bids/Offers tab.
2. Select the 2049.JUN.Qualification.Auction from the Market filter. You should see the Portfolio Name you just uploaded in the list.



1. Click on your portfolio name to enter the Bid Portfolio Editor.



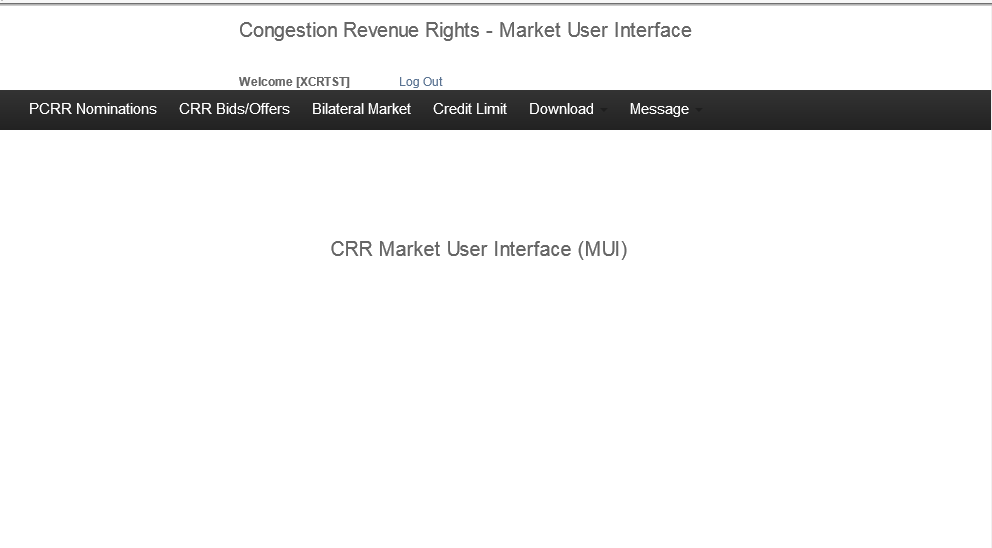
1. Edit the top row by:
   1. Changing the **Source** to LZ\_South   
      *To change the source, highlight the first bid by clicking on its row. Click on the + to expand the list of Sources and Sinks in the Data Pane to the right of the Bid Portfolio Editor. You may either scroll to, or search for, LZ\_South. Select LZ\_South and click on “Set Source”.*
   2. Changing the MW to 10
   3. Changing the price to 15
   4. Changing the type to OPT (option)
2. Verify all Start Dates are 6/1/2049 and all End Dates are 6/30/2049 and click the “**Save**” button.
3. Navigate to the Auction Portfolio List screen.



1. Click the Submit button to submit your portfolio to the auction. Click yes at the prompt to confirm you want to submit this portfolio. Click ok.
2. Enter the date you completed this task in C16 on the Qualification Scorecard.

**Task 6: View Private and Public Messages**

1. Go to the following URL using your CRRAH digital certificate ending in 5000: <https://testmis.ercot.com/mui-ercot-ihedge/>. *The following screen appears.*



1. Click on the Message tab, and select **Private** from the Message menu.
2. Attach a screenshot of this page to your email when submitting your Qualification Scorecard. *Note: there will not be any messages in the Private view as a newly registered CRRAH.*
3. Click on the Message tab, and select **Public** from the Message menu.
4. Attach a screenshot of this page to your email when submitting your Qualification Scorecard.
5. Enter the date you completed these tasks in C17 on the Qualification Scorecard.

**Task 7: Complete CRR Market User Interface training (web-based)**

1. Complete the [CRR Market User Interface](https://www.ercot.com/services/training/courses/details?name=CRR-Market-User-Interface-WBT) web-based training.
2. Attach the course completion certificate to your email when submitting your Qualification scorecard.
3. Enter the date you completed this task in C18 on the Qualification Scorecard.

**Task 8: Complete Congestion Revenue Rights Market training (web-based)**

1. Complete the [Congestion Revenue Rights Market](https://www.ercot.com/services/training/courses/details?name=Congestion-Revenue-Rights-WBT) web-based training.
2. Attach the course completion certificate to your email when submitting your Qualification scorecard.
3. Enter the date you completed this task in C19 on the Qualification Scorecard.

**Task 9: Subscribe to the Notice\_CRR distribution list**

1. Subscribe to Notice\_CRR distribution list at [http://lists.ercot.com](http://lists.ercot.com/)**.**
2. **Attach a screenshot of your subscription confirmation to your email when submitting your Qualification Scorecard.**
3. **Enter the date you completed this task in C20 on the Qualification Scorecard.**

**Submitting Completed Qualification Scorecard**

Email the completed Qualification Scorecard, with the four required screenshots, two course completion certificates and downloaded PeakWD CRR Network Model attached, to [ercotcrr@ercot.com](mailto:ercotcrr@ercot.com) and your ERCOT Account Manager with “[CRRAH shortname] CRR Qualification Scorecard” in the subject. You may include the attachments in any of the following ways: a) attach a single Word document containing all screenshots, b) attach the screenshots individually to the email, or c) attach a single zipped folder containing all four screenshot files, two course completion certificates and the downloaded PeakWD CRR Network Model file.

The CRR Team will verify that all tasks have been successfully completed and will communicate results back to the CRRAH. If any tasks do not pass verification, the CRR Team will provide details as to why the task did not pass and will request that the CRRAH resubmit the Qualification Scorecard after correcting any issues.