M-RETS Compliance Training

February 26, 2014
Bryan Gower, APX
M-RETS Administrator
MRETS@apx.com

Copyright APX © 2014
Overview

• Overview of the Process for Retiring Certificates for State REO/RES/RPS

• General Instructions for Certificate Retirement
  • Create New Sub-accounts for Retirement
  • Retirement Process
Overview of the Process for Retiring Certificates for State REO/RES/RPS

- All certificates used for compliance must be retired into a retirement sub-account

- A default retirement sub-account is provided to each account holder

- New retirement sub-accounts can be created for each Compliance Year, State and Electric Service Provider. The name of the sub-account should be as specific as possible to clearly identify the retired certificates deposited within the retirement sub-account.
  - For example, if you want to retire for Minnesota compliance, you should name the retirement sub-account ‘Minnesota 2009’
  - Please consult with your state regulator for subaccount naming preferences
General Instructions for Certificate Retirement
Create New Sub-accounts for Retirement

Sub-accounts can be accessed, edited and added from the **Account Status – Edit Sub-Account** module located on your Account Dashboard. Retirement and active sub-accounts can be added using the **Create New Subaccount** link at the bottom of the module.

![Image of M-RETS Midwest Renewable Energy Tracking System](image-url)
General Instructions for Certificate Retirement
Retirement Process

Retirement Process Step 1
Access an active Subaccount by selecting the hyperlinked quantity next to the sub-account name located within the Account Status module.
General Instructions for Certificate Retirement Retirement Process

Retirement Process Step 2: Initiate Transfer
1) From the Active Certificate Disposition Report, designate the RECs to be Transferred
2) REC Batches are designated using the check boxes in the first column
3) Quantity can be adjusted in the Transfer Quantity Tab
4) Initiate Transfer using the Batch Transfer button at the top of the Screen
General Instructions for Certificate Retirement

Retirement Process

Retirement Process Step 3: Review Batches Transfer

1) Review Quantity of RECs being transferred by batch in the **Transfer Quantity Column** at the top of the **Transfer Certificates** review screen
   a) The **Transfer Certificates** review screen can be sorted (single column) by selecting the column name
2) Review Total RECS being transferred in the **Transfer [____] Certificates** below the review screen
General Instructions for Certificate Retirement

Retirement Process

Designate Type of Retirement Step 4

1) Select retirement button at the bottom of the Transfer Certificates review screen
2) Choose a sub-account in the Retirement Subaccount dropdown
General Instructions for Certificate Retirement Retirement Process

Designate Type of Retirement Step 4 (cont.)

3. Choose Retirement Type
   a) State/Province other than WI should choose **Used by the Account Holder for a State-Regulated Utility Renewable Portfolio Standard/Provincial Utility Portfolio Standard**
Designate Type of Retirement Step 4 (cont.)

4. Designate Retirement details for Retirement type
   a) **State-Regulated Utility Renewable Portfolio Standard** retirement type will designate **State/Province** and **RPS Compliance Period**
General Instructions for Certificate Retirement
Retirement Process

Confirm Retirements Step 5

1) Access retirement sub-account located within the **Account Status** module.
2) Designate the retirement sub-account in the **Subaccount Filter** to view all retirements.
Questions?

Bryan Gower,
M-RETS Program Administrator, APX
Raleigh, NC
408-899-3340
bgower@apx.com
Skype: Bryan.Gower