MiQ Registry User Guide
02– Account Holders

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1 Introduction

This is a guide for organisations who wish to take part in the MiQ Registry as Registrants.

You shall register your organisation and Primary User in the Registry Landing page at https://miqregistry.org in order to gain access to the MiQ Registry, please click the “Register now” button as shown in Figure 1.

![MiQ Registry Landing Page](image)

Figure 1. Registry Landing Page.

After the registration process in the Registry Landing Page, the MiQ Registry Team shall perform the Onboarding checks. Once a user or organisation has passed Know Your Customer (KYC) and Anti Money Laundering checks they will have access to the Registry as a Registrant. You shall use the email and password from registration to login on to the Registry at https://miqregistry.org/login. To access, click the "Login" button at the top right corner of your screen (Figure 1).

If you don’t remember you email or password, or are you having trouble logging in, please contact the MiQ Helpdesk at: support@miqregistry.org.

Once you login to the Registry you will be greeted by the dashboard page pictured in Figure 2. Users who hold Registrant & Account Holder status can find information relating to Registrant functions of the Registry in User Guide – UG-03 Registrants.
Please note, the browsers listed below are preferred environments for the MiQ Registry:

- Google Chrome
- Microsoft Edge
- Safari
- Opera

There is a non-critical lacking functionality on Issue Request date display due to the browser capacities with Mozilla Firefox. For optimal performances of the MiQ Registry platform, please refrain from using Mozilla Firefox.
2 General Functionalities

2.1 Users

Clicking the "Users" button will bring up the user management screen, see Figure 3 below. Here you can see all the Users associated with this Account, edit those users’ details and create new users.

![User Management screen](image)

**Figure 3 User Management screen**

To add new Users to your Account, click the Add User button on to right corner of the Users Screen. On the following screen Figure 4, enter:

1. **Title** – The new Account User’s title (Mr, Mrs, Miss, Ms, Dr, etc.). This Guide recommends using a title that does not exceed the 4 characters.

2. **Forename** – The first name of the Primary User

3. **Surname** – The first and second (if applicable) last name of the Primary User

4. **Telephone** – A telephone number for the Primary User, this could be his/her institutional telephone or personal telephone. Please include the country code in parenthesis. *For example, the UK is (+44)*. Please don’t put a space or hyphen between numbers, e.g. (+44)123456789.

5. **Email** – An email address for the Primary User, this could be his/her institutional email or a personal email. This will be the login email address. An email address can only be used once across all Evident Services (for example existing I-REC Registry account holders). Email addresses cannot be changed after account creation.

6. **Password** – The password set up and confirmed upon User creation will be the initial password to be used for logging in by the newly created User. This password can be changed after User creation by the User.

then click the "Create" button on the right corner of the Create screen (as shown in Figure 4) to create a new User.
Please note: We **highly recommend** any new User changing their password directly upon their first log in on the MiQ Registry.

When logged in, you can now change your own password on the User management screen by clicking the “Edit” button next to the User you are logged in as (Figure 3).

Change your password by entering the new password of your choice in the “Password” field and repeat the desirable password in “Confirm Password” field as shown in Figure 5.

**Please note:** You can only change your own password. If you wish to change the password of another User from your organisation, please have the person set as your organisation’s Primary User contact the MiQ Registry Support (support@miqregistry.org).

**Please note:** The email address associated to a User cannot be edited. If you wish to change the email address, please create a new User and contact the MiQ Registry Support (support@miqregistry.org) to delete the previous outdated User.

Clicking the “Edit” button for another User of your own organisation will bring up the Edit User page Figure 6. Here you can change the User’s Title, Forename, Surname, and Telephone number (not the password). Click the “Update” button to save changes.
2.2 Organisations

Go to My Organisation tab on the left side of the screen, this will bring up the Organisation screen, see Figure 7 below.

By clicking the "View" button, you can view information relating to your Organisation as it is registered on the Registry. To change any information relating to your organisation, please contact the MiQ Registry Support at support@miqregistry.org. If you are not the Primary User, this Guide recommends getting in touch with your organisation’s Primary User to contact the MiQ Registry Support (support@miqregistry.org).
3 Account Holder Scope

To trade or Retire Certificates on the Registry, Accounts must be set up. There are two types of Accounts – Trading and Retirement.

Trading Accounts are used to receive Certificates at Issuing and to Transfer Certificates between Accounts.

Retirement Accounts are used to Retire Certificates by assigning a Beneficiary to a Certificate thereby removing that Certificate from circulation on the Registry. Be aware that transfers of Certificates to Retirement Accounts can only be performed once a Certificate has been awarded the Verified Grade Status, upon successful approval of an Ex-Post Audit of the relevant Facility. Additionally, note that once a Certificate is transferred to a Retirement Account (i.e., Certificate is “Retired”), it can never be transferred again.

As an Account Holder on the MiQ Registry, you can open and manage Trade and Retirement Accounts. Once those accounts have been created you can make and manage transfers of Certificates on the Registry.

Please note: Trading Account codes will begin with a “T” followed by seven digits. Retirement Account codes will begin with a “R” followed by seven digits.

3.1 Accounts

To access the Accounts screen shown in Figure 9, go to Accounts in the left side tab of your home screen. The Accounts screen displays the balance of Certificates of each account in the column “Balance”.

If one of your Trading Accounts has a positive balance (as shown in Figure 8), you can click on the “Transfer” button next to the account to access the Transfer function and start creating a transfer from this Account (see section 0 for more details).

To create an account, click the “+ Create Account” button on the top right corner of Accounts screen, Figure 8.

On the Create Account screen shown Figure 9, enter the following:

1. Name – Enter the name of the Account you wish to create
2. **Type** – Select the Account type, Retirement or Trading. See the difference between these two types of account in the MiQ Program Guide.

3. **Private** – Use the check boxes to select whether you want the Account to be Private or not. A Private Account can only receive Certificates from Accounts owned by your organisation.

4. **Active** – Use the check boxes to select whether you want the Account to be Active or not. Accounts must be marked as active to transfer or receive certificates.

Click the "Create" button to create your account.

![Create Account screen](image)

Figure 9 Create Account screen

Once Accounts are created, you will be able to view them on the Accounts screen, Figure 8. From this screen, you can edit Accounts and view Account Summaries.

If you click the "Edit" button next to the account you have created (as shown in Figure 8), this will bring up the Edit Account screen, Figure 10. Here you can update the name of the Account and change the Private/Active status of the Account. Click Update to confirm your changes.

![Edit Account screen](image)

Figure 10 Edit Account screen

If you click the "Summary" button next to the account you have created (as shown in Figure 8), this will display the Account Summary screen, Figure 11.

On this screen, you can check all historical transactions associated with this account. If the current Account is listed under Source Account, this will represent a transfer out, or debit. If the current Account is listed under Destination Account, this will represent a transfer in, or
credit. You will find details of Date, Type of transaction, Source Account, Destination Account, Debit, Credit and Balance.

On the Account Summary view, you can see transactions coming from and to other Accounts. To provide clarity, the account number **NOT** relating to the Account you are currently viewing in Figure 11 is displayed in bold.

If you click the "Account Holdings“ button on the top right corner of Account Summary Display (as shown in Figure 11), this will display the Account Holdings screen, Figure 12. Holdings will display all Certificates that are currently held by this account. It will show all blocks of Certificates that were transferred or issued to your Account. This includes details about the following attributes (highlighted in Figure 12) of the Certificates held on the Account:

- Production Month
- Grade
- Grade Status
- Zone (MiQ zone)

Please note: one transfer of Certificates can consist of Certificates from more than one issuance event. In this case, the number of entries on the Account Holding screen will be more than the number of transfers into your account.
Figure 12 Account Holdings screen
3.2 Transfers

3.2.1 Creating a Transfer

Certificates held in your Account can be transferred to other Trading Accounts on the Registry for trading purpose. Retiring certificates can only happen after an Ex-Post Audit has been carried out to verify the certificate grade, Retirement of Certificates will be performed through a different process flow.

When transferring Certificates, it is important to obtain the correct Destination Account code. This is an alphanumeric code that starts with a T (trading Accounts), followed by a seven-digit number.

Go to "Transfers" tab on the left of the screen (as shown in Figure 13), this will show two new tabs:

- New & Open Transfers - Click on this tab to show newly added or in process transfers.
- Completed Transfers - Click on this tab to show the transfers history of your organisation.

To create a new transfer, two options exist:

- Click the "+ Create Transfer" button on the top right corner of the Transfers page Figure 13.
- Click on the “Transfer” button next to a Trading Accounts with a positive balance in the Accounts Screen Figure 8. This will automatically pre-populate the new Transfer with the Source Account name and code relating to the relevant Account.

You will be required to select the source Account (one of your Accounts on the Registry), the Volume of Certificates you wish to transfer and the Destination Account. Click "Create" to create a transfer, Figure 14.

Please note: if the source account doesn’t contain enough Certificates for the transfer, or, if the Destination Account is entered incorrectly, you will receive an error message.

Please note: You can find the account number relating to the accounts held by your organisation on the Account screen shown Figure 8.
3.2.2 Editing transfer requests

It is possible to edit transfers even after they are in draft. You can change the Destination account and the Volume of Certificates to be transferred.

To edit a transfer, click the “Edit” button next to the relevant transfer on the Transfers screen, Figure 15.

3.2.3 Allocating transfers

Once you are satisfied with a transfer, you will need to allocate enough Certificates to cover the transfer.

Once the Transfer was created, you will see your transfer in the “Draft/In-Progress” table of the Transfer screen (as shown in Figure 15). After that, click the “Allocate” button next to the transfer you have created, this will be open the Transfer Allocation screen as (Figure 16). The Transfer Allocation screen will provide you with a list of all the MiQ Certificates available on that Account.

From here, you will see a list and the volume of available Certificates held by the source Account along with information on the following attributes of your Certificates:

- Facility Name
- Grade
- Grade Status
- Production Month (Latest & Earliest)
- Country of Production
- MiQ Zone

You can filter the MiQ Certificates from any attribute using the dropdown menus under the relevant column titles to choose which Certificates to display (Figure 16).

![Allocate Transfer screen](image)

**Figure 16 Allocate Transfer screen**

To allocate Certificates to the transfer, choose a Facility Account and click the Allocate button on the right side (as shown in Figure 16). This will bring up Figure 17. You can choose to allocate the full amount or a portion of the requested transfer amount. Click allocate to continue. The top right of the screen will show the current allocation and the remaining number of Certificates that need to be allocated. You are free to change the composition of an allocation as many times as you like. Once all Certificates have been allocated and you wish to submit the transfer request, click Submit. You will be asked to confirm the transfer.

![Allocate Certificates screen](image)

**Figure 17 Allocate Certificates screen**

### 3.2.4 Approve Transfer

Once a transfer has been submitted, the status of the transfer will be updated to Submitted on the Transfers screen, Figure 18.
The final step is to approve the transfer, click the "Approve" button (as shown in Figure 18), this will take you to the Approve Screen, here you can review the contents of the transfer, Figure 19. To complete the transfer, click the Transfer button, you will be asked to confirm the transfer and the transfer will be completed. Both the source and destination Account holdings will then be updated to reflect that transfer.

Please note: Once approved, a transfer cannot be cancelled. Would you need support regarding an incorrect Transfer, please contact support@miqregistry.org.