

A one-time transfer is used to send a certificate batch(es) once to another location. To create a one-time transfer, follow the steps below.

Creating a One-Time Transfer

Step One:

In the Account Status module on the WREGIS homepage, find the **Active** certificates and click the **quantity**.

| Account Status | |
|--|-----|
| Account Summary | |
| Reporting Entity Data and Manual Generation Totals | |
| Data pending certificate creation | |
| Generation | 20 |
| Thermal | 0 |
| Account Activity | |
| Certificates | |
| Active | 368 |
| Retirement | 0 |

Step Two:

Select the certificate batches you are transferring by clicking the box(es) in the **Select All** column on the left. If you are transferring part of a batch, edit the amount in the **Transfer Quantity** column to the right of the box.

| Select All | Transfer Quantity | SubAccount | WREGIS |
|-------------------------------------|-------------------|------------|--------------------------|
| <input type="checkbox"/> | 10 | Default | |
| <input checked="" type="checkbox"/> | 6 | Default | W21 Jay James - JayJames |
| <input type="checkbox"/> | 61 | Default | W14 Jay James - JayJames |

Use the column filters to narrow the selection of certificate batches. See Additional Information on page 4.

Step Three:

Click **Batch Transfer** at the top of the screen.

Batch Transfer REC/eTag Match REC/eTag Unmatch

Load Delete

Certificates in Active Sub

Step Four:

Verify the certificates by reviewing the information at the top of the page.

| Certificate Serial Numbers | Quantity | Transfer Quantity | Generator Plant-Unit Name | Fuel Type |
|----------------------------|----------|-------------------|---------------------------------|-----------|
| 21-AZ-74-1 to 6 | 6 | 1 | Jay James - JayJames Multi Unit | Solar |

Transfer 1 certificates to:

Step Five:

Complete the transfer details depending on the transfer type—

First, select the transfer type by clicking the **radio button** to the left.

Second, complete the fields **only for the transfer type you are creating.**

Select an Account Holder

Transfer Execution Date (Optional):

Another Account Holder

Active

Reserve

Retirement

Export

Bulletin Board

Used by the Account Holder for a State-Reg

Used by the Account Holder for a Municipal

Used by the Account Holder for Other Regu

Used by the Account Holder for a REC-Only

Other:

Compatible Tracking Systems:*

Account ID:*

Account Name:*

If the radio button on the left is not changed to the correct transfer type, the certificates will transfer to their original Active sub-account location.

Transfer details cannot be changed once the transfer is complete.

Step Six:

Scroll to the bottom of the page and click **Submit**. A pop-up will appear asking you to confirm the transfer—select **OK**.

Once the transfer is complete, you will be directed back to the Certificates in Active Sub-Account page.

Inter-account transfers will require acceptance by the transfer recipient.

Message from webpage

?

Please confirm that you would like to transfer these certificates to an Active Sub-Account?
Warning: Leaving this page while a certificate transfer is in process may result in the transfer not completing correctly.



Step Seven:
 Verify the transfer was created correctly:
 Click **Certificate Transfer History** in the Account Holder Reports module on the homepage.
 Click on the applicable tab—**Inter-Account** for transfers to another Account Holder or **Intra-Account** for transfers within the same Account.

Account Holder Reports

- [My Event Log](#)
- [My Sub-Accounts Certificates Disposition](#)
- [My Recurring Transfers](#)
- [Certificate Transfer History](#)**
- [My Account Registration History](#)

Inter-Account Transfer Intra-Account Transfer

| Outbox | |
|----------------------------|--------------|
| Certificate | |
| Outgoing Certificates | Certificates |
| Total Pending Certificates | 1 |

Accepting/Rejecting a One-Time Transfer

Step One:
 Locate the **Inbox**, on the left side of the WREGIS homepage. Click the quantity under **Certificates**.

| Inbox | |
|----------------------------|--------------|
| Certificate | |
| Incoming Certificates | Certificates |
| Total Pending Certificates | 1 |

Step Two:
 Make sure the certificates being transferred meet your contract needs.

| Generator Plant-Unit Name | Fuel Type | Vintage Month | Vintage Year | Certificate Serial Numbers |
|--|-----------|---------------|--------------|----------------------------|
| Football Power Plant - BrettFavreUnit1 | Wind | 9 | 2007 | IMP-MRETS-67-115 to 115 |

Step Three:
 Select the checkbox(es) for the batches you are accepting or rejecting on the left side of the report.

| <input type="checkbox"/> | Execution Date | Status | Transferor | Quantity | WREGIS GU ID | Gene |
|-------------------------------------|----------------|---------|---------------------------------|----------|--------------|------------|
| <input checked="" type="checkbox"/> | | Pending | Bonneville Power Administration | 1 | IMP25 | Foot Brett |



Step Four:
 Select **Accept Selected** or **Reject Selected** at the top of the page. A pop-up will appear—click **OK**.
 If accepting a transfer, select the sub-account in which to deposit the certificates from the dropdown, then click **Accept**.

Total Quantity: **Accept Selected** **Reject Selected**

Select a Sub-Account

| | |
|--|---------------------------------|
| From: | Bonneville Power Administration |
| Quantity: | 1 |
| Execution Date: | Immediate |
| [Deposit Sub-Account ID Type]:* | Select One ▾ |

* Required Field

Accept **Cancel**

Step Five:
 Acceptance or rejection of the transfer can be verified in the **Certificate Transfer History** report.

Account Holder Reports

- [My Event Log](#)
- [My Sub-Accounts Certificates Disposition](#)
- [My Recurring Transfers](#)
- [Certificate Transfer History](#)**
- [My Account Registration History](#)

Additional Information

Report Filters

On the Certificates in Active Sub-Account page, filters can be used to narrow your search:

- A. Filter by sub-account using the dropdown option at the top of the page.
- B. Filter by certificate characteristics (generator, fuel type, vintage, etc.) using the text boxes at the top of each column. More criteria will be required if the field is numerical—use the button to the right of the text box to enter.
- C. The Advanced Filter can be used to filter by Quantity, Generation Period, Generating Unit, Fuel Type, and Eligibility.

Transfer Withdrawal

Transfers to another Account Holder can be withdrawn if an error was made during transfer creation or if you do not want the transfer to proceed for any reason.

1. Click the quantity in the **Outbox** (found on the homepage).
2. Select the certificate transfer to be withdrawn by clicking the checkbox on the left.
3. Select **Withdraw Selected** at the top of the page.

A transfer cannot be withdrawn once the transferee accepts the transfer.

