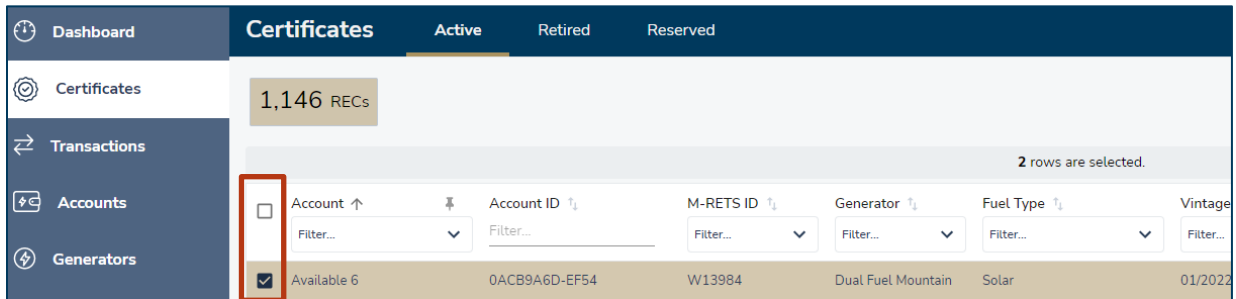Certificate Transfers allow you to move active certificates to a new Active Account or Organization in WREGIS. If you are transferring certificates to another Organization, that Organization will need to accept the transfer before the transaction is completed. If you would like to set up a transfer that initiates whenever certificates are created for a generator, see Automated Recurring Transfers for more information.
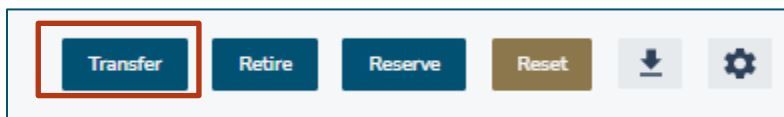
Initiating a Certificate Transfer

1. Navigate to **Certificates** and select the certificate batch(es) you would like to transfer from the **Active** tab. If needed, you can use the filters at the top of the table to help find the desired certificates.

2. Click **Transfer** in the upper-right of the screen.

3. Verify the batches selected for your transfer. If you wish to transfer only part of a certificate batch, you can change the number in the **Quantity (RECs)** field to reflect the desired number of certificates. Click **Next**.
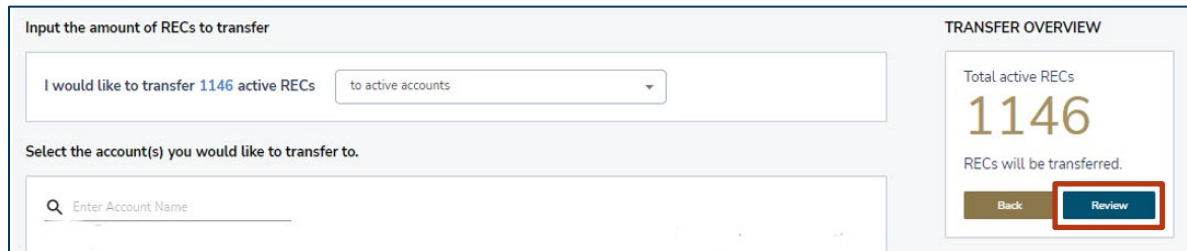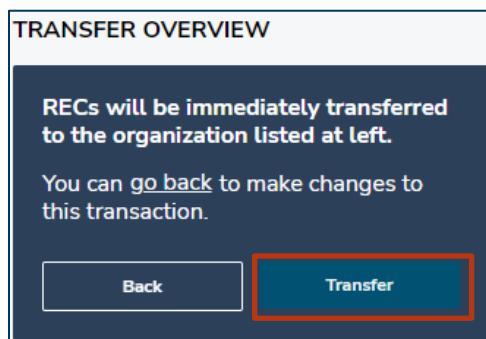
4. Indicate whether you are transferring the certificates to another Active Account or Organization using the dropdown, then choose the destination. Click **Review**.

5. Review the transfer details and click **Transfer**, if correct. Use **Back** to edit if needed.

6. When transferring certificates to an Active Account in your own Organization, the transaction will process immediately. If you are transferring certificates to an external Organization, the transaction will be placed in 'Pending' status until the certificates are accepted or rejected by the receiving Organization (see instructions below).

7. If desired, download a transaction summary or view pending transactions by using the links provided.

Accepting or Rejecting a Certificate Transfer

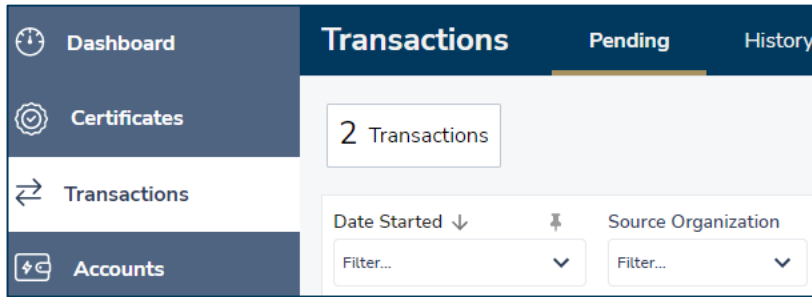You must accept certificates transferred to your Organization from another Organization before they will be deposited into the Active Account of your choice. If the transferred certificates are not what you expect, or you believe they were sent to you in error, you can choose to reject the transaction instead. WREGIS recommends contacting the sender directly before rejecting transfers.

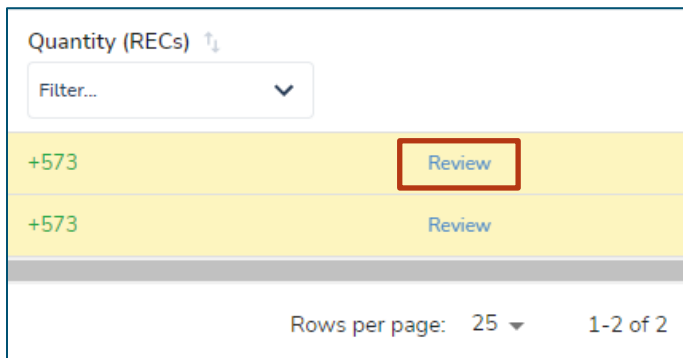To accept or reject a certificate transfer –

1. Navigate to **Transactions** and find the desired transaction on the **Pending** tab.

2. Click **Review** on the right side of the screen for the corresponding transaction.

3. Verify the certificate batches included in the transaction are what you expected (vintages, generators, eligibilities, fuel types, etc.). You can view additional certificate information by clicking **Details** on the right side of the screen.

4. If accepting the transfer, select the Active Account the certificates will be deposited into.

5. Click **Reject Transfer** to reject the certificates or **Review Transfer** to verify the certificates.

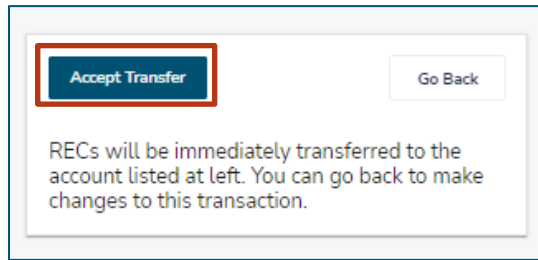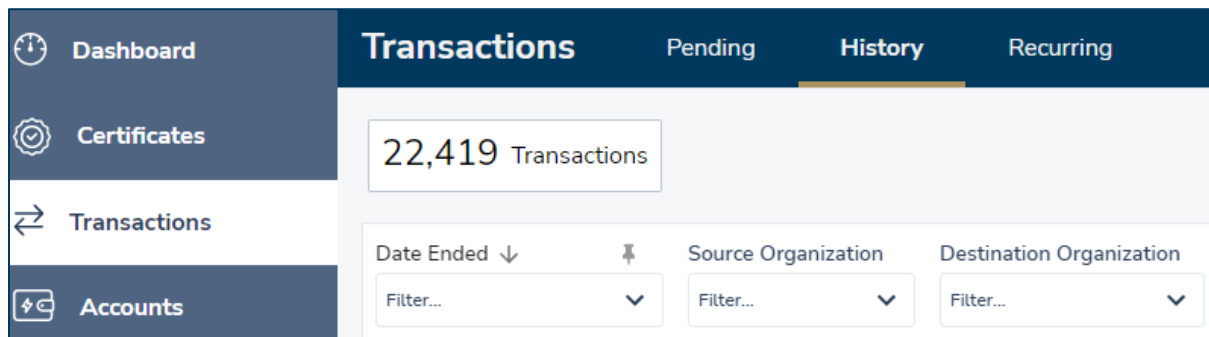6. Verify the transaction details and receiving Account one more time, then click **Accept Transfer**.

7. You can view the completed transaction on the **History** tab in **Transactions**.

Withdrawing a Certificate Transfer

An Organization can Withdraw pending transfer if the receiving organization has not accepted it yet. Transfers that have already been accepted cannot be withdrawn. To execute a withdrawal –

1. Navigate to **Transactions** and find the transaction you wish to withdraw on the **Pending** tab.
2. Click **Withdraw** on the right side of the screen to launch a dialogue box.
3. Click **Withdraw** in the dialogue box to confirm.