The Gold Standard®

Registry Operational Guidelines

Last update: 11 September 2015
What we will cover...

1. Creating an Account
2. Adding a project
3. Uploading documents
4. Email Notifications
5. Selecting an Auditor
6. Requesting Issuance
7. Transferring / Assigning credits
8. Registry Public View
1. Creating an Account
Applying for an Account

2. Enter data (required data is denoted by an asterisk*)
3. Press the Red ‘Submit Application’ button at the bottom of the form
Automated Email

1. Immediately upon submission, you will receive an email confirmation
2. Please send the requested documentation to registry@goldstandard.org
3. Upon satisfactory review of the documentation, the account will be approved

Gold Standard Registry Account Request Notification

Dear Brendan Monaghan,

Thank you for applying for a Gold Standard account on the Gold Standard Environmental Registry. All accounts are subject to approval. As part of our due diligence procedures, all registry account applicants must provide the following documentation:

- A certified copy of your organisation's Certificate of Incorporation together with the Memorandum and Articles of Association. Where the original documents are not in English, a certified translation should be provided.
- Your company or organisation's registration number, registered office address, names of all directors (preferably an official extract from the registry) and your organisation's website URL.
- A bank statement less than 90 days old from your organisation’s bank showing the address of the organisation.
- A letter on your organisation's letterhead stating that the proposed account manager has been duly appointed and is authorised, on behalf of your organisation, to accept The Gold Standard Foundation’s Terms of Use and any modifications. There must be satisfactory evidence that the individual who has signed the letter is authorised to do so on behalf of your organisation (e.g. director or other senior officer).
- A statement setting out the nature of your organisation’s business, your reason for applying for a Gold Standard registry account and how you intend to use the account.

All required documentation must be submitted electronically, via email, to registry@goldstandard.org. Follow-up information requests can include items such as individual utility bills or bank statements.

If you have any questions about the registry account application process, you may reach the Gold Standard Registry Administrator via email at registry@goldstandard.org or by phoning +44 111 208 3457 between the hours of 09:00 and 17:00 GMT (Monday to Friday).

Kind regards,
1. Creating an Account

**Required Documentation**

1. Certificate of Incorporation in English
   - An excerpt from the local municipality where the company was registered, translated into English by a certified translator

2. Company Registration Number Document
   - For example, a VAT certificate

3. Bank Statement less than 90 days old
   - The statement should show the company name and address as shown in the registration document

4. Letter authorizing account manager
   - If the account manager is not a company director, then we will require a letter from a company director authorizing this person to be the registry account manager

5. Statement of Intent
   - A short letter outlining why the organization is applying for a registry account
Automated Email

1. We will review the documentation for your account within 10 days of receipt.
2. Upon approval, you will receive two emails: one email asking you to upload a copy of ID and another email confirming your username
   (which is your email address).
3. Click on the link to set your password for the first time.

Welcome to Markit Environmental Registry

Dear Markit Client,

We have created an account for you to access Markit Environmental Registry within www.markit.com. Your login credentials are listed below.

Username: brendan.doe@goldstandard.org

To set your password and login, please click on the password link below:

https://products.markit.com/home/ResetPassword.frm?code=xBaDQ3C4i6xGrGALkWnHL5V9xqyiFwUq8bPi3q

If clicking the above link does not work, please copy and paste the URL in a new browser window instead.

If you have received this email in error or have any other questions, please contact us at support@markit.com.

Thank you.

Markit Client Relations Team
U.S.: +1 877 762 7548
EMEA: +32 4 275 4800
Asia Pacific: +65 6022 4210
Email: support@markit.com
2. Adding a Project
My Projects and Issuances Tab

1. The main tab for managing projects
2. Projects (left): For managing projects up to Registration
3. Issuances (right): For managing projects from Registration to Issuance
4. To add a new project, click ‘New’ on the left menu bar
To Add a New Project

5. Select New Gold Standard Project
This is the screen that appears when you click ‘New Gold Standard Project’

1. Ensure ‘Project Name’ and ‘Project Description’* fields are filled in on the main screen
2. ‘Account Name’ will already be filled in
3. Ignore ‘Assigned To’ field
4. Click ‘Add Activity’ (highlighted in Orange on the bottom right)
When you click ‘Add Activity’, the below columns shown in the screenshot will appear

1. Obligatory fields are denoted by a red asterisk *
3. Under ‘Project Type’, select the relevant project type
4. If you already know the ‘Auditor’, or DOE, you may select them from the dropdown menu
5. Enter the date the planting started under ‘Start Date of Construction’
6. Enter the ‘Crediting Period Start’ and ‘End’ dates
7. When you have done this, click the ‘Save as Draft’ button on the bottom left
Adding a Project

1. Click ‘Additional Info’ button (highlighted in orange on the middle right)
2. Adding a Project

1. Ensure the relevant values are entered for the various fields that are mandatory.*
2. Click ‘Save’
Adding a Project

1. Click ‘Site Detail’ button (highlighted in orange on the middle right)
Adding a Project

1. Ensure that all obligatory fields, as denoted by a red asterisk*, are filled in
2. Click ‘Save’
Adding a Project

1. Click ‘Save as Draft’ (highlighted in orange on the bottom right), followed by “Submit” when you are ready to submit your project to The Gold Standard Foundation.
Automated Registry Emails (sent to all account contacts)

1. Upon saving project, you may start receiving emails from environmental@markit.com
2. Emails will contain information relevant to the project

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**Action Item Notification**

Dear Brendan Monaghan,

Please complete the following Action Item in the registry:
Upload Appropriate Documents

**Action Item details:**

Project ID: GS3274
Project Name: Land Use and Forests Test Project 09 June 2014
Project Status: New Project
Project Country: United States

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Kind regards,

The Gold Standard Registry Team

goldstandard@markit.com
Phone: +44 131 201 9457
• Please note, to create a PoA you should click 'New Gold Standard Master Project' and complete the master project form

• You should then create a ‘sub-project’ for the PoA itself and each VPA/CPA
3. Uploading Documents
Uploading Documents

The following information is for Energy and Waste projects, who have to submit all project documentation to the registry. Land Use & Forests projects should submit their project documentation to the relevant Google Drive folder that shall be communicated to them by the LUF Certification team.

1. Log into the registry
2. Click on ‘My Projects and Issuances’ tab on the top menu bar
3. Double click on your organisation name, double click on the project name
Uploading Documents

1. Click on ‘Document’ (on the middle right)
Uploading Documents

1. Click ‘Add Document’ and select document to upload
Uploading Documents

1. You may select multiple documents by keeping the ‘Control’ key pressed and selecting documents
2. We suggest giving your documents clear, concise names that include the GS ID number
Uploading Documents

1. Be sure to select correct Document tag in the dropdown menu (i.e. PDD)
2. Click ‘Save’ in the Documents window
Uploading Documents

1. Also click on the ‘Save’ button after closing the documents window.
3. Uploading Documents

Note about Accepted Document Types

- The registry can accommodate the following file types: PDF, DOCX, DOC, TXT, RTF, XLS, XLSX, XLSB, SHP, DBF, SHX, PRJ, BNA, CSV, DGN, DXF, GXT, GML, JPG, GIF, BMP, PNG, TIFF
- The maximum file size is 20 MB
- PDF file sizes can often be reduced using Acrobat Pro or Preview. Excel files can often be reduced by saving as .xlsb
- Please email registry@goldstandard.org if you have any issues uploading documents.
4. Auditor / DOE Selection
Auditor Selection

1. Log into the registry
2. Click on ‘My Projects and Issuances’ tab on the top menu bar
3. Double click on your organisation name, double click on the project name
Auditor Selection

1. In the main project screen of the registry, in the ‘Auditor’ column, click ‘Choose One’. For ‘Energy’ projects this shall read “Validator”
Auditor Selection

1. Select an auditor from the list
2. Click ‘Save’
Auditor Selection

1. Click on the ‘Submit’ button !!!
5. Issuance
Issuance

- For Energy and Waste projects, once the project reaches the status of ‘Registered’, you must create the Issuance in the registry. For LUF projects, this shall be done by the Gold Standard.
- Go to the ‘My Projects and Issuances’ page, highlight the project name and click ‘Create Issuance’
• Enter the start and end dates of the Monitoring Period, then click ‘Add Monitoring Period’ followed by ‘Add Issuance’ (at the bottom right)
• You need to click ‘Add Issuance’ for each vintage year for the issuance and then correct the vintage start and end dates.
• Ensure that obligatory fields* are filled in accurately.
• Save as Draft and then submit the issuance.
6. Transferring and Assigning/Retiring Credits
Manage My Units tab

- Credits can be transferred to other accounts or may be retired/assigned on the “Manage My Units” page
Transferring credits

1. To Transfer Credits to another account, highlight credits you would like to transfer (highlighted in blue)
2. Click on the ‘Transfer’ button, above left (highlighted in orange)
Transferring credits

1. You may add a comment if you wish, this will only remain visible to you.
2. Ensure that the volume in the ‘Transfer Amount’ column corresponds to the volume you wish to transfer.
3. ‘Price’ and ‘Currency’ can be entered, although this is not obligatory.
4. Enter the GS Registry Account Number of the Destination Account in the ‘Registry Accounts’ tab and click search. Select the account.
5. Click ‘Submit’ on the bottom right.
Transferring credits

1. A transfer is finalised when the destination account holder approves it.
2. To approve a Pending Transfer, click on where it says ‘Pending Transfer’.
Transferring credits

1. Ensure all details are correct
2. Click ‘Approve’ on the bottom left (highlighted in orange)
3. At this point the transfer is finalised and the credits will appear in your account
Assigning or retiring credits

1. Select the credits you would like to Assign/Retire (highlighted in blue)
2. Click on the ‘Assign’ or ‘Retire’ button, above left (highlighted in orange)
Assigning credits
1. Ensure that volume corresponds to the volume you wish to Assign or Retire
2. Choose whether you wish the account name to be shown on the Public View
3. Enter any remarks you would like associated with the Retirement or Assignment
4. Tick ‘Remarks Publicly Visible’ if you would like the remarks to be visible on the public view
5. Click ‘OK’
Assigning credits
1. Click ‘Yes’ to confirm the assignment or retirement
2. Please note: Assignments and Retirements are irreversible, so please check the data thoroughly
7. Registry Public View
Public View:

1. Projects
2. Retired Credits
3. Issuances / Listings
Public View: Projects

1. Select Gold Standard to view Energy and Waste projects and Gold Standard LUF to view Land Use and Forests Projects
2. Click ‘View’ to view publicly available Issuance-related documents
3. Issuances and Assignments / Retirements can also be viewed by clicking on the relevant tab
The Gold Standard Foundation

registry@goldstandard.org

www.goldstandard.org