1. Account Opening and Management

1.1 For New Account Holders

Applying for an account

The first step in obtaining access to the Registry is to submit the account application request. The user will need to submit the online account application request using the form available here) wherein the user is required to complete the following information.

Where the account holder is not registered at Companies House or not registered for VAT, then the user should type N/A:

- **Organization Details**
    - Registered Name
    - Trading Name
    - Classification
    - Tax/VAT/Other No
    - Address 1
    - Address 2
    - City
    - Zip/Postcode
    - State/Province
    - Country
    - Website
- **Main Contact** (The main contact is the person with overall responsibility for the account within the company. They can appoint other account managers. This could be the same person as the account manager)
    - Name
    - Email
    - Phone
- **Billing Contact**
    - Name
    - Email
    - Phone
- **Account Manager** (The account manager is the person who will be contacted on a day-to-day basis during the account setup/registry operations and the person for whom a user-ID will be setup within the registry. This could be the same person as the account manager)
    - Name
    - Email
    - Phone
    - Address 1 *(required if Account Manager is external to the main offices)*
    - Address 2
    - City
    - Zip/Postcode
    - State/Province
    - Country

Identification

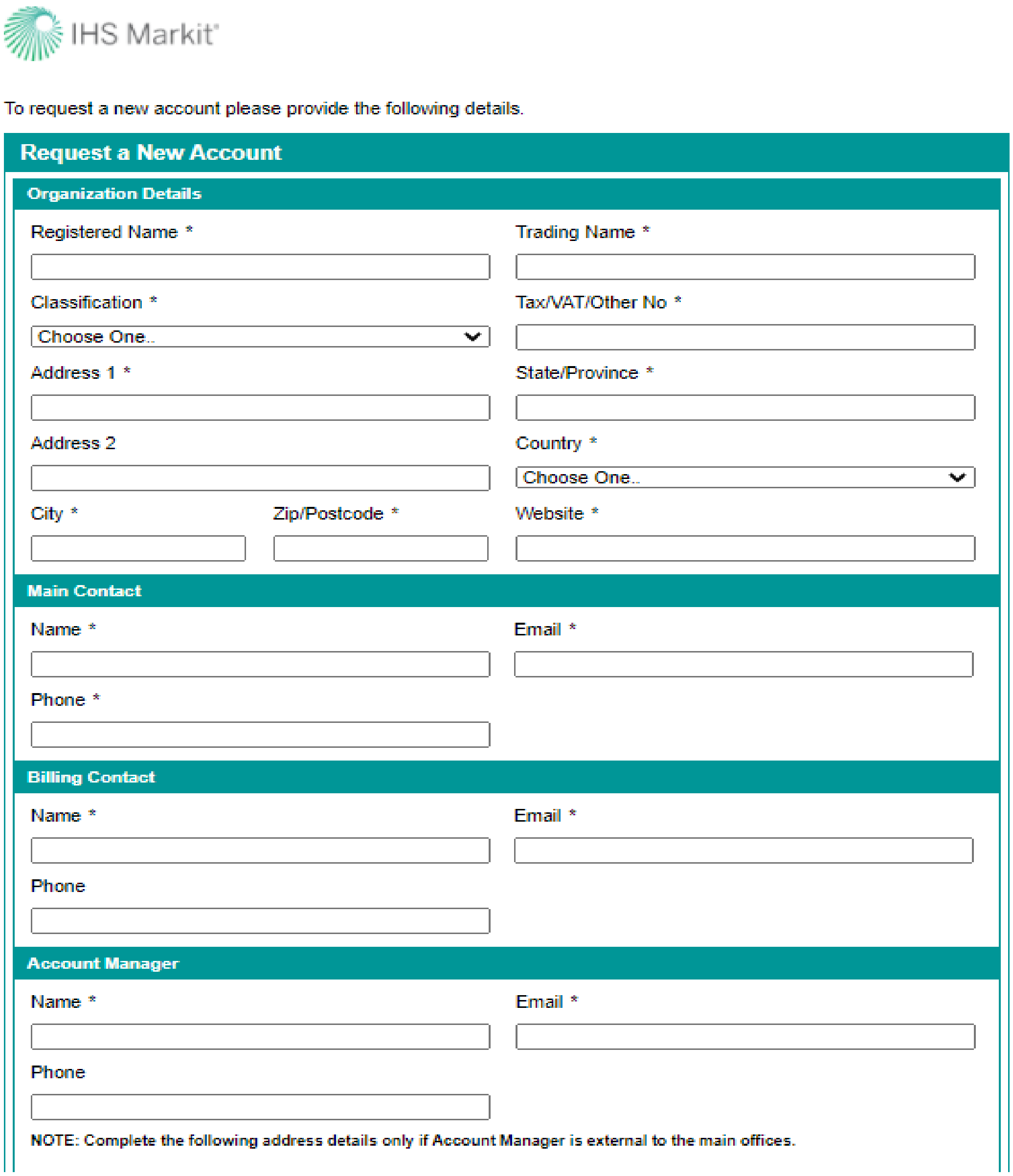
- Company (or Charity) Registration Number (Type N/A) if not registered
- Country of Incorporation
- Type

Preferences

- Standards (Choose UK Woodland Carbon Code or Peatland Code from the dropdown menu)

Declaration

- Review and accept Terms and Conditions and Privacy Policy



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To request a new account please provide the following details.

Request a New Account

Organization Details

Registered Name *

Trading Name *

Classification *

Choose One..

Tax/VAT/Other No *

Address 1 *

State/Province *

Address 2

Country *

Choose One..

City *

Zip/Postcode *

Website *

Main Contact

Name *

Email *

Phone *

Billing Contact

Name *

Email *

Phone

Account Manager

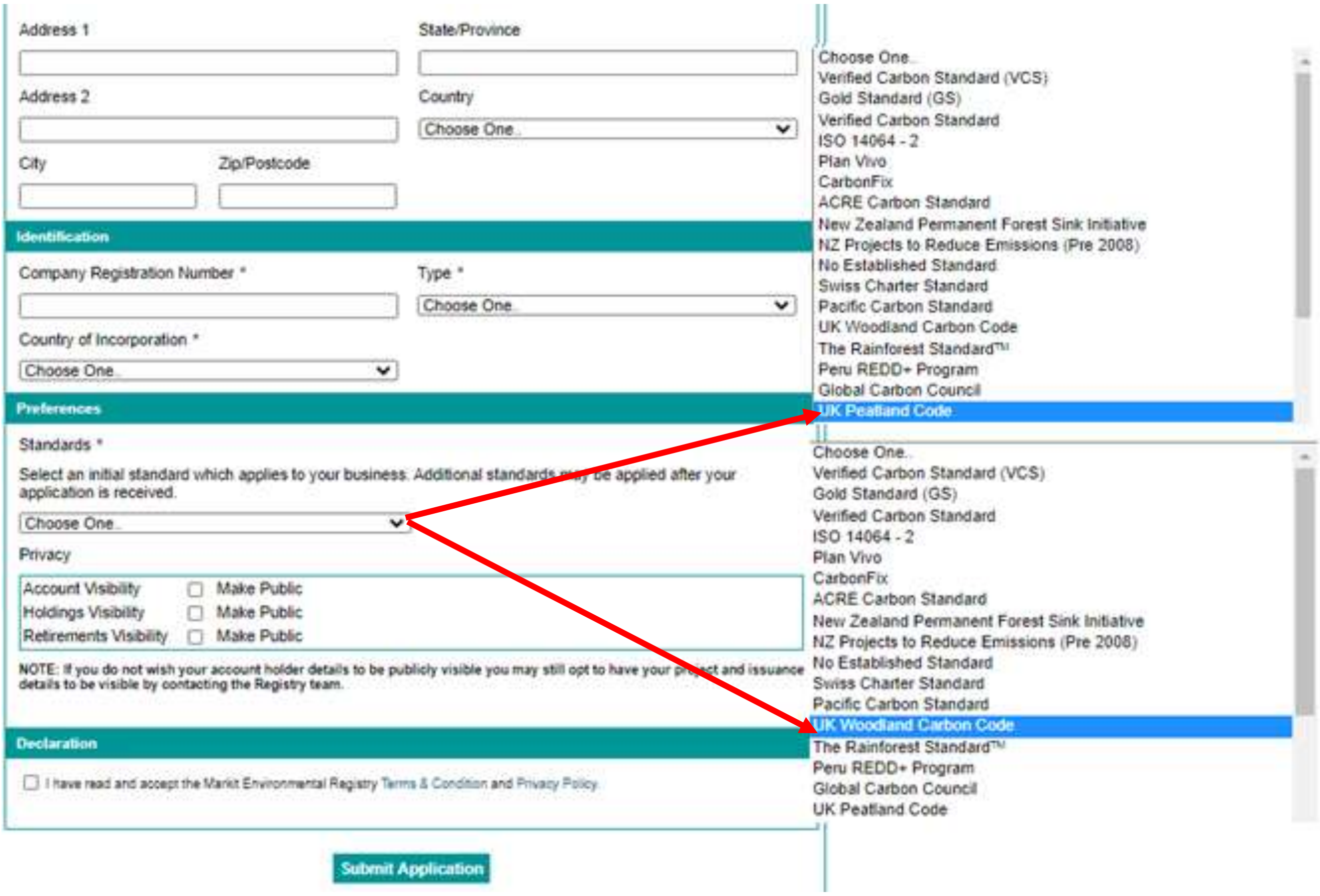
Name *

Email *

Phone

NOTE: Complete the following address details only if Account Manager is external to the main offices.

Note that the applicant will need to choose the relevant standard name (i.e. UK Peatland Code or UK Woodland Carbon Code) as shown in the screenshot below.



Documents Required for KYC (Know-Your-Customer) Checks

Upon submission of the account application, the user will receive an automated email notification asking for the submission of the following documents:

- A copy of the organizational certificate, such as the Articles of Incorporation or Company Certificate. This certificate must include the organization registration number, registered office address, and a list of the names of all directors.
- If the registry Account Manager is not named as a company officer in the organizational certificate, a company officer of the applicant organization is required to submit a letter (on company letterhead) stating that the person nominated as the registry Account Manager has been duly appointed and is authorized to accept the Registry Terms of Use and any modification on behalf of the applicant organization.

See sample email below -

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IHS Markit Environmental Registry Account Request Notification

Dear Project Developer ,

Thank you for applying for an account on IHS Markit 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 copy of the organizational certificate, such as the Articles of Incorporation or Company Certificate. This certificate must include the organization registration number, registered office address, and a list of the names of all directors.

- If the registry Account Manager is not named as a company officer in the organizational certificate, a company officer of the applicant organization is required to submit a letter (on company letterhead) stating that the person nominated as the registry Account Manager has been duly appointed and is authorized to accept the Registry Terms of Use and any modification on behalf of the applicant organization.

IMPORTANT: Your application is not complete and cannot be processed until this documentation is received.

The following is a copy of the information we have received on your application:

Application Approval Process

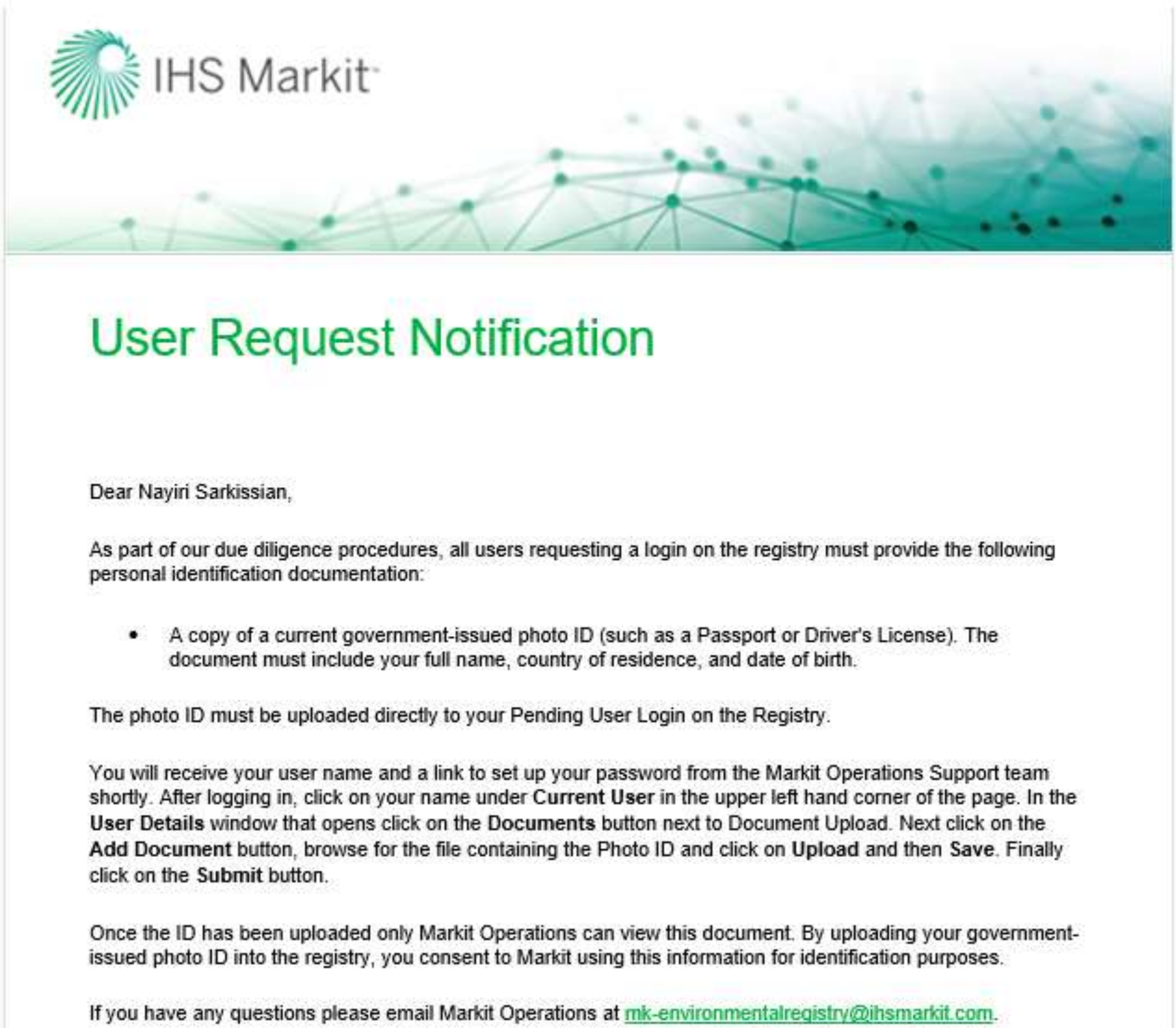
Once your account application is submitted it will be reviewed by the regulators (SF or IUCN) and Markit Operations

Activating a User on Your Account

Upon Activation of the account, Markit Operations will create a username for the nominated account manager during which the account manager will receive two emails:

- The first email, sent from MK-EnvironmentalRegistry@ihsmarkit.com will have the subject: “Pending User Notification – Request for Identification Documents”. This email will provide instructions for initial login and upload of photo identification

Email Notifcation:



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User Request Notification

Dear Nayiri Sarkissian,

As part of our due diligence procedures, all users requesting a login on the registry must provide the following personal identification documentation:

- A copy of a current government-issued photo ID (such as a Passport or Driver's License). The document must include your full name, country of residence, and date of birth.

The photo ID must be uploaded directly to your Pending User Login on the Registry.

You will receive your user name and a link to set up your password from the Markit Operations Support team shortly. After logging in, click on your name under **Current User** in the upper left hand corner of the page. In the **User Details** window that opens click on the **Documents** button next to Document Upload. Next click on the **Add Document** button, browse for the file containing the Photo ID and click on **Upload** and then **Save**. Finally click on the **Submit** button.

Once the ID has been uploaded only Markit Operations can view this document. By uploading your government-issued photo ID into the registry, you consent to Markit using this information for identification purposes.

If you have any questions please email Markit Operations at mk-environmentalregistry@ihsmarkit.com.

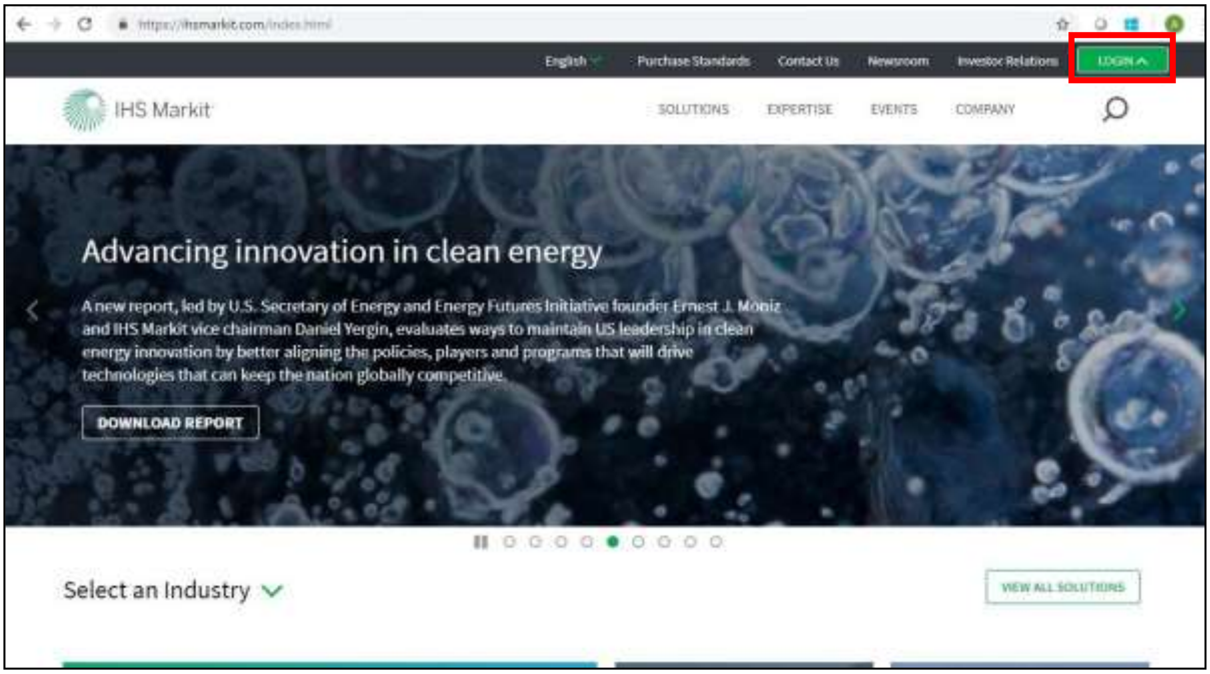
- The second email, sent from support@ihsmarkit.com, will have the subject "Welcome to the IHS Markit Environmental Registry". This email will identify the user's username and provide instructions for setting a password.
- Once the account manager submits the photo ID, it will be reviewed by Markit Operations team and upon approval, the manager will have complete access to the Registry account.
- If the ID is not valid or not acceptable, Markit Operations will reject it and the user will need to upload the valid/acceptable ID again in order to gain access to the Registry account.
- As part of IHS Markit's due diligence procedures, all users of the Registry are required to submit a government-issued photo ID to establish their identity. All users are also subject to IHS Markit Registry Terms & Conditions available here.

How to Upload and Submit Photo ID

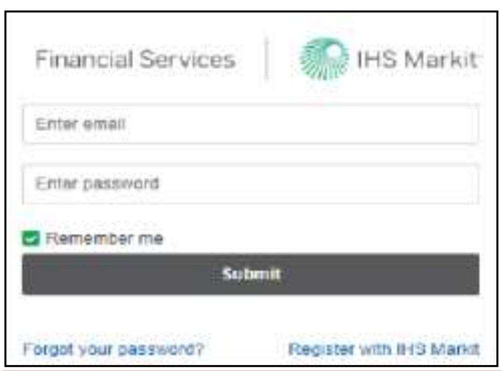
The sections below will provide complete step-by-step instructions on how to log into the Registry and upload and submit the identification document. Please read these carefully before contacting IHS Markit Operations at MK-EnvironmentalRegistry@ihsmarkit.com.

The IHS Markit Environmental Registry is accessible when a user is logged into the IHS Markit website.

- Enter https://ihsmarkit.com/index.html in your web browser. The company home page will appear.
- Select the green **LOGIN** button in the upper right and corner of the page:

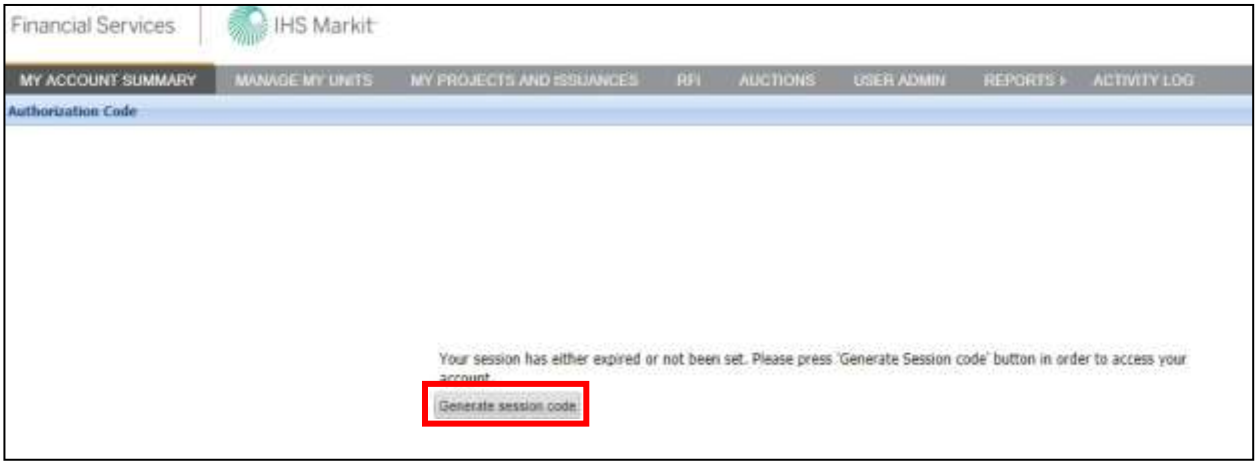


- The first time you login, select the All Customer Logins button and search for the Environmental Registry
- Enter your unique username and password in the designated fields shown below.



- The first time a user logs into ihsmarkit.com, the default IHS Markit product will need to be identified. This is done on the upper right-hand corner of the page. Hold your cursor over the current product name and a dropdown list will appear. Scroll down the list until the name **Registry** appears and select it. If the name Registry is not in the list, contact support@ihsmarkit.com. Once you have done this, you will always be directed to the Registry login page when you return to IHS Markit login page

- The IHS Markit Environmental Registry has two layers of login security. The first time a user logs into the Registry, the user will be presented with the following page:



- The registry will send a Session Code to the user's email address. Please refer to the following example:

<u>Email Notifcation:</u>

Markit Registry Session Authorization Code

Dear MER27 TEST USER (PD),

You have requested an authorization code to verify your new session for the Markit Environment Registry.
Please enter the code into your account online when prompted.

Session Code: COQJTT

Please note that this code is case-sensitive.
If you did not request a new session authorization code, please contact the Markit Operations team at the contact information listed below.

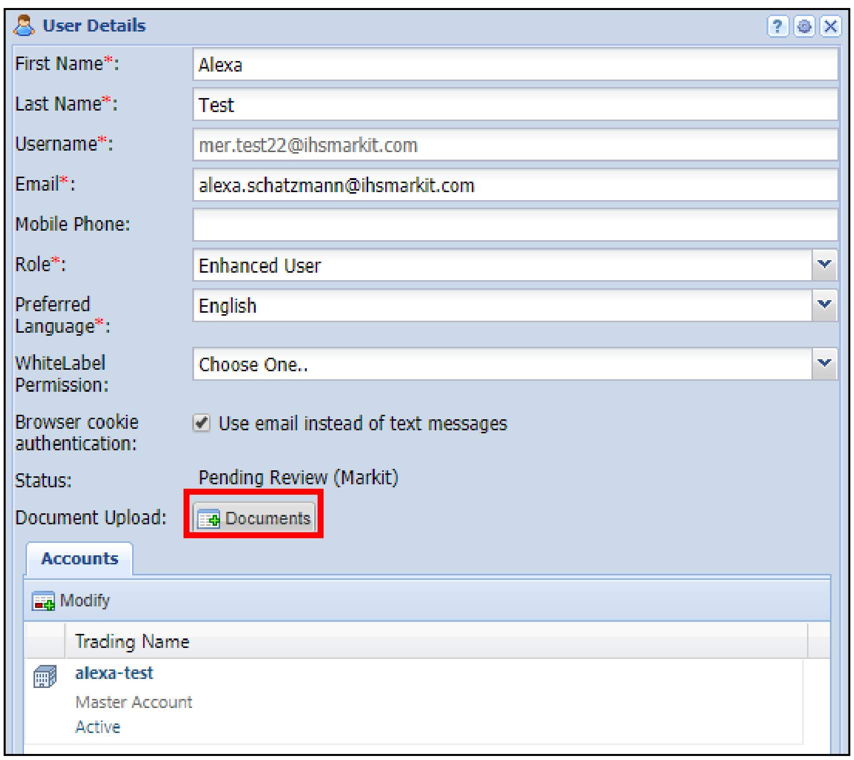
NOTE: The user will only need to validate their browser through the session code process when the browser's cookies have been cleared. If the user accesses the Registry from the same location/IP address, the session code will not need to be generated during every sign on.

Steps to follow to upload Personal Identification Documents

Step 1 - My Account Summary

Once you have logged into the Registry successfully, the **My Account Summary** page will be displayed.

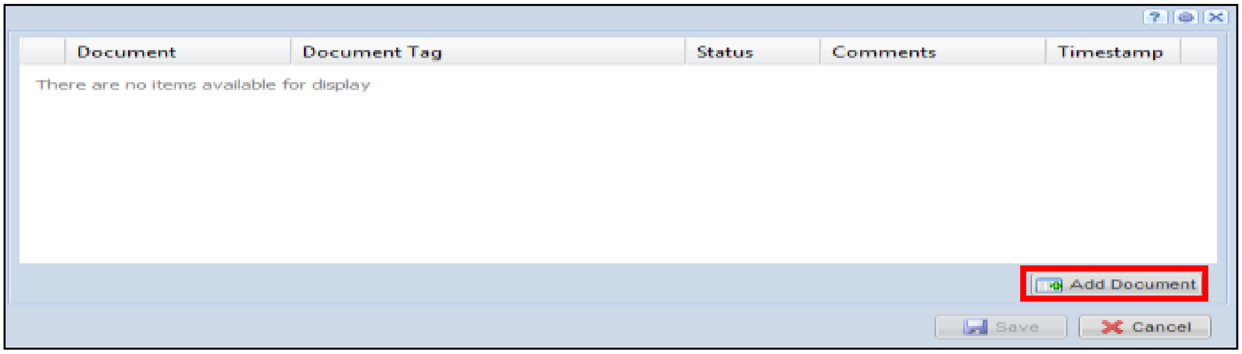
- Click on the Username in the upper left-hand corner of the page and the User Details window will be displayed:

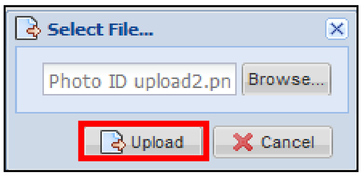


Step 2 – Upload Documents

- Click on the **Documents** button to upload a photo ID

Click on the **Add Document** button to browse for the file containing your photo ID, then click Upload, and Save.



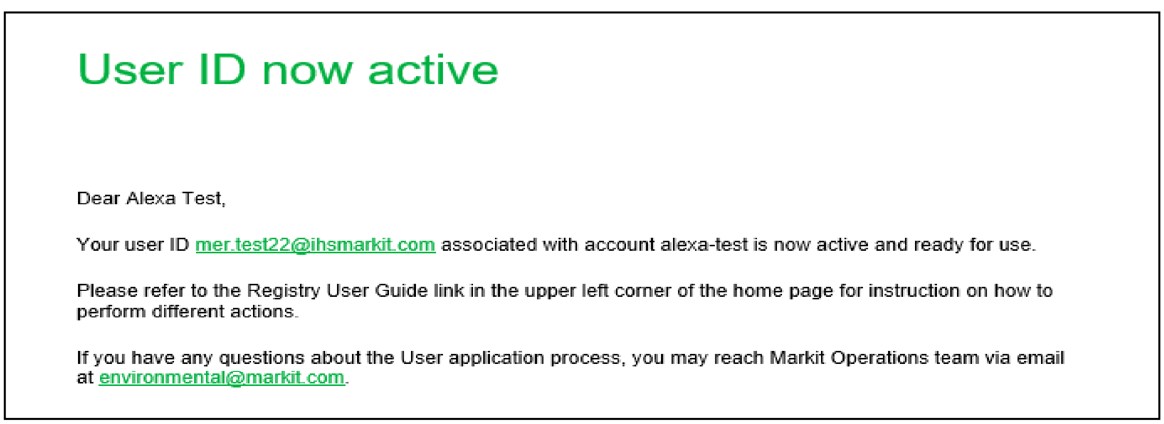


Step 3 – Submit Documents

- Finally click the **Submit** button to alert IHS Markit Operations that the ID has been uploaded.

Step 4- Markit Approval

- Once IHS Markit Operations has reviewed the ID, they will activate the username.
- The user will receive the following email, and all menus will be available when the user logs into the application again.


User ID now active

Dear Alexa Test,

Your user ID mer.test22@ihsmarkit.com associated with account alexa-test is now active and ready for use.

Please refer to the Registry User Guide link in the upper left corner of the home page for instruction on how to perform different actions.

If you have any questions about the User application process, you may reach Markit Operations team via email at environmental@markit.com.

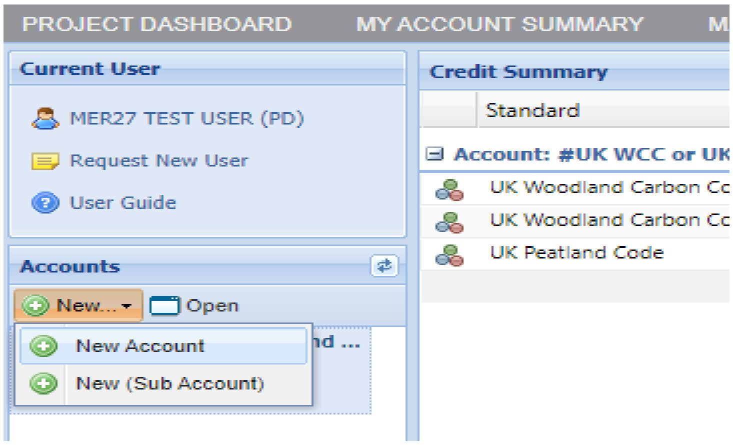
1.2 For Existing Account Holders

Below are the steps to create a new account for existing account holders on the Markit Registry. A Forest Agent can create a new account for their organization or for their client, small project developer they are providing consultation to. Also, a Registered Entity/Broker/Retailer (as an agent) can create a sub-account for their individual clients.

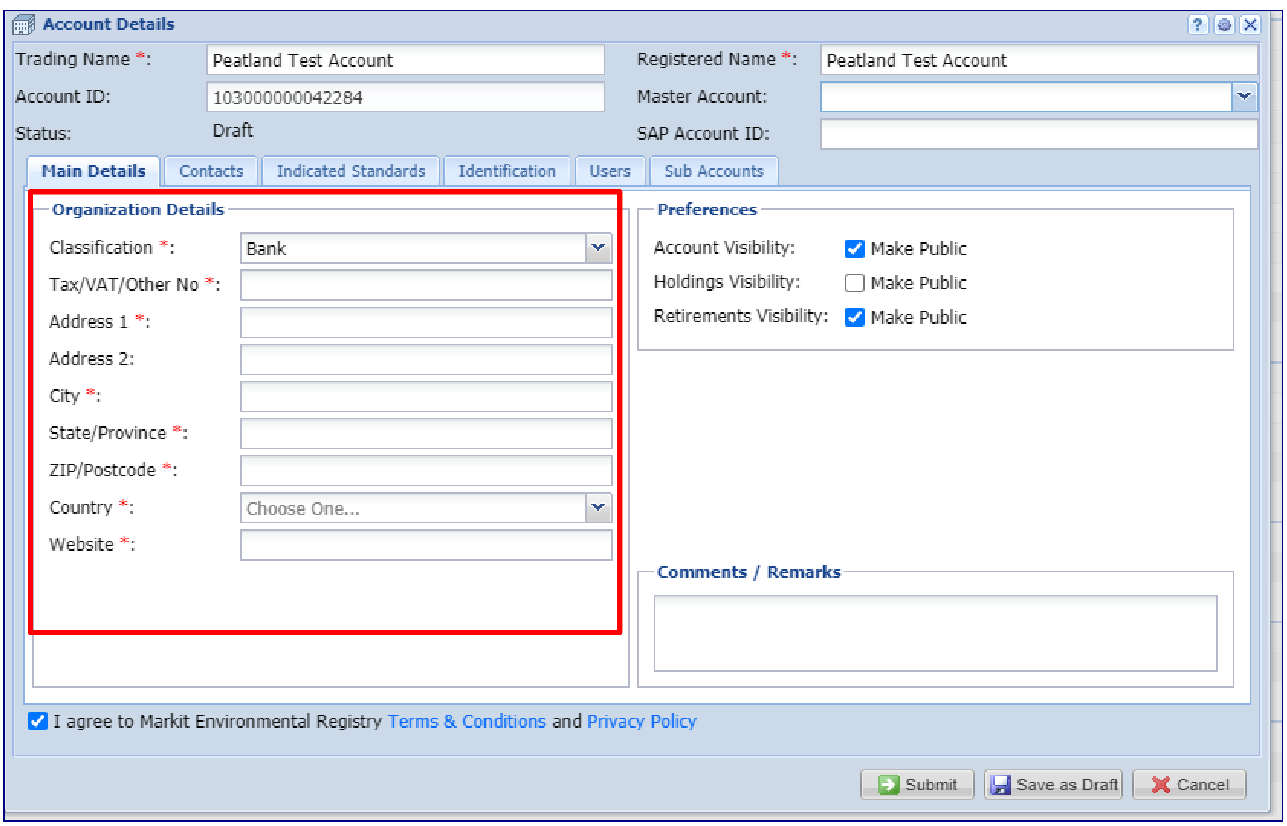
Creating a new Account

Step 1

- Navigate to the My Account Summary tab.
- Click the **New** button under the Accounts heading.



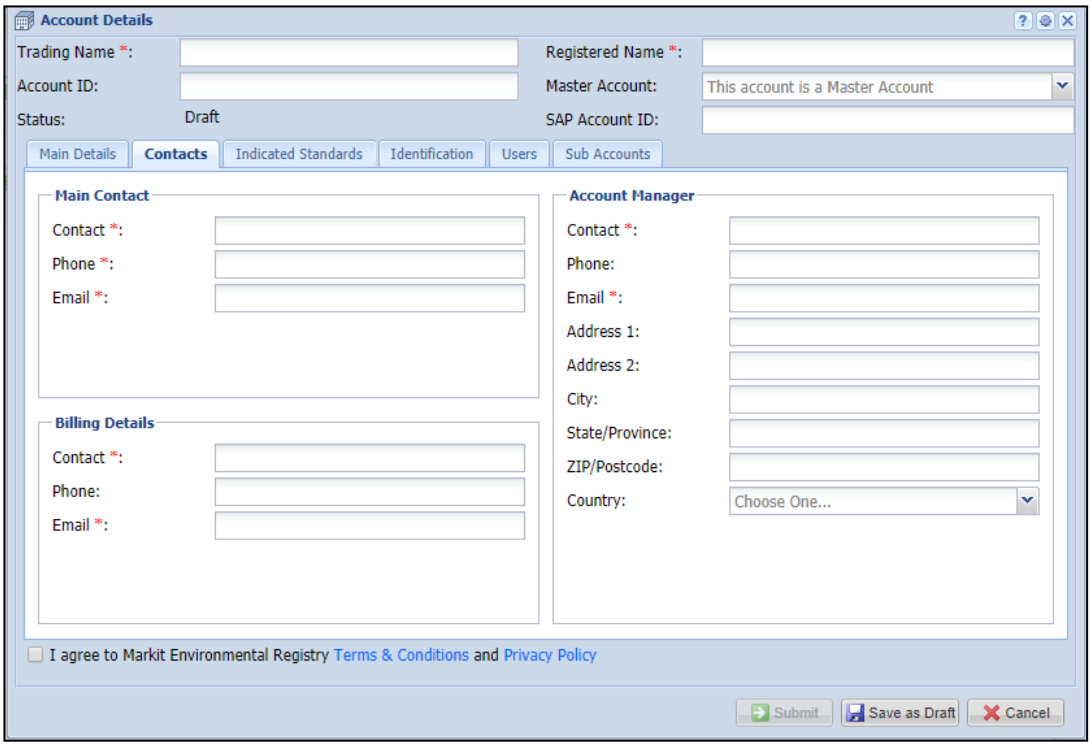
- The **Account Details** window will appear.



Field	Definition
• Classification	• Classification of the organization based on our account types
• Tax/VAT No	• Tax or VAT number required for invoicing
• Account Visibility	• Check to allow the account name to be publicly visible
• Holdings Visibility	• Check to allow the account's active holdings to be publicly visible
• Retirements Visibility	• Check to allow the account's retired credits to be publicly visible
• Master Account	• Field that is used to connect a sub-account to a master account
• Comments/Remarks	• Any comments or remarks for the IHS Markit Operations Team

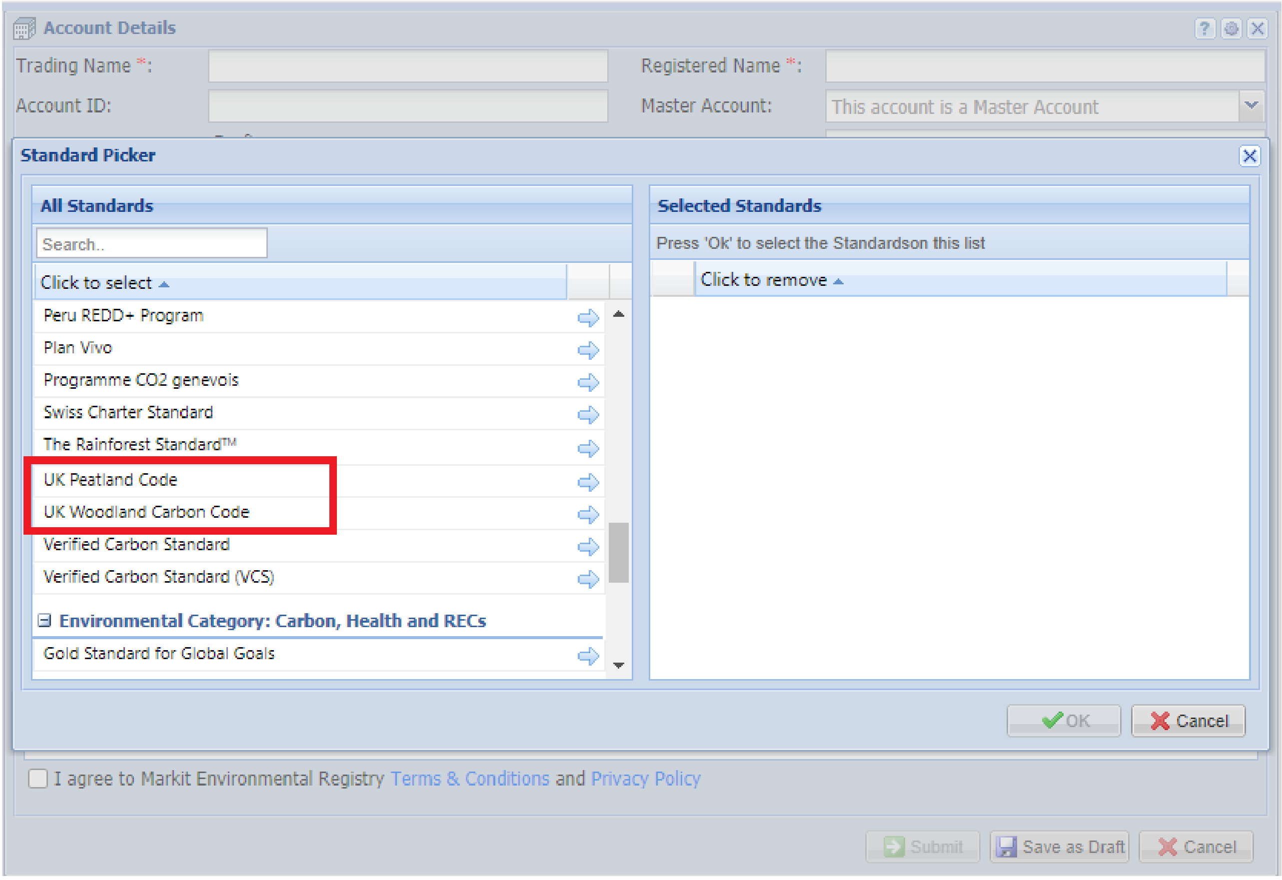
Step 2

- Navigate to the *Contacts tab* of the **Account Details** window and complete all required fields.



Step 3

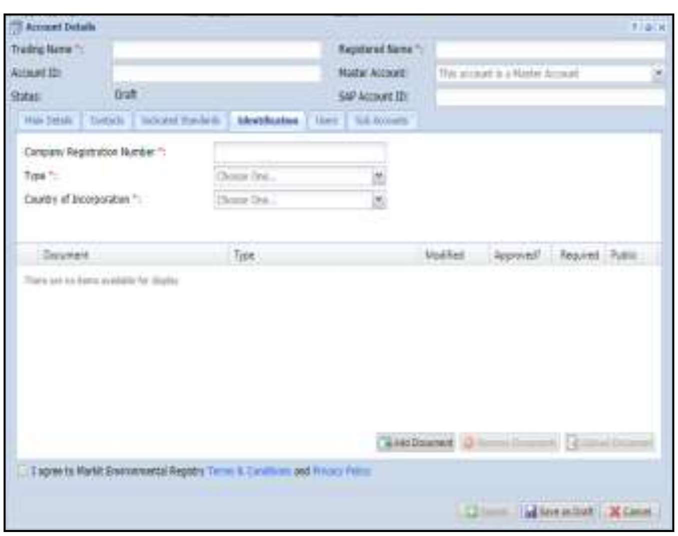
- Navigate to the *Indicated Standards* tab of the **Account Details** window.
    - Only add a standard if the account will be solely used for that standard. Otherwise, the account will be permissioned to use all available standards.
- If assigning a standard to the account, click the **Modify** button to open the **Standard Picker**
    - window.



- Select a standard. The name of the standard will move to the right-hand side of the window. Then click **OK**.

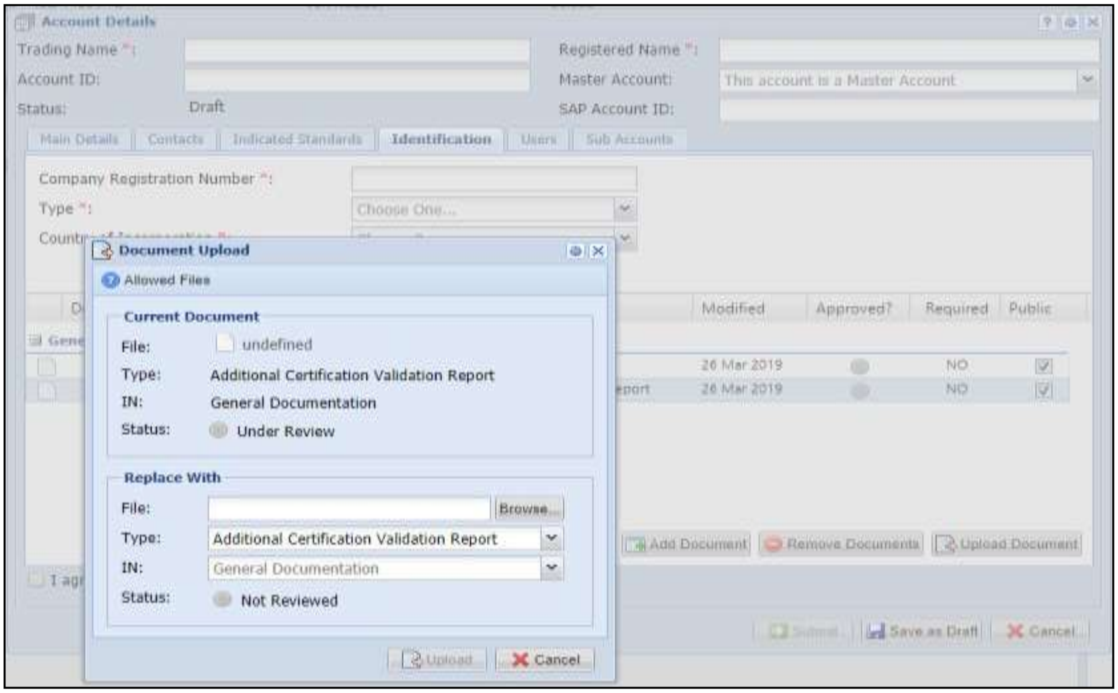
Step 4

- Navigate to the *Identification tab* of the **Account Details** window.
- Add the company's registration number and upload any identification documents (optional at this stage).



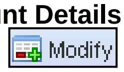
- To upload a document:
  - Click **Add Document**, **Upload Document**, then **Browse**.

- Edit all other fields then click **Upload.**

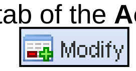


- When the document has been uploaded, it will appear in blue.

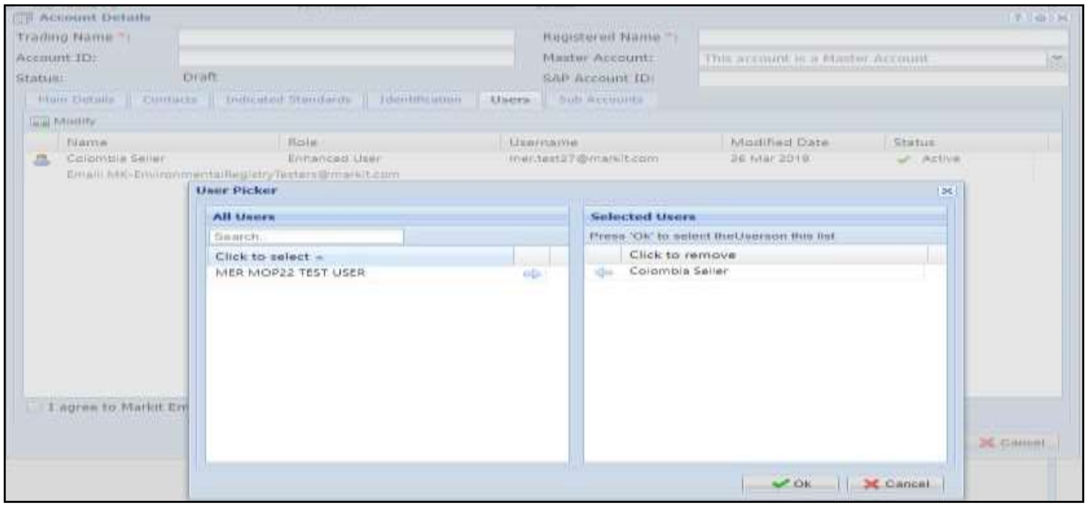
Step 5

- Navigate to the *Users tab* of the **Account Details** window.
- To add users to this account, click the  button. Select a user. The user's name will move to the right-hand side of the window. Then click **OK.**

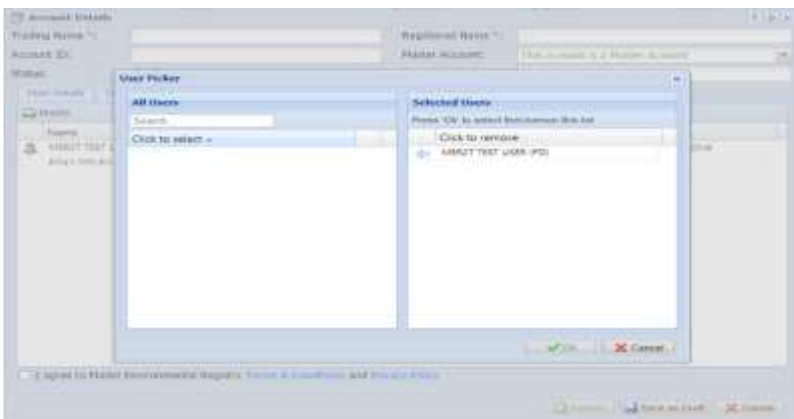
Step 6

- Navigate to the *Sub Accounts* tab of the **Account Details** window.
- To add sub accounts, click the  button.

- Select a sub-account. The account name will move to the right-hand side of the window. Then



- Click **OK.**



- Click the  button to save all changes that have been made to the account.
- Click the  button to submit the account for review by the IHS Markit Operations Team.

- When the account is approved, it will appear in the Accounts tab as "Active".

Creating a new Sub-Account

Sub-accounts may be opened in the name of legal entities that are wholly-owned subsidiaries of the Account Holder, or institutional clients on whose behalf the Account Holder has documented contractual authority to act. Prior to any such sub-accounts being opened or the Account Holder commencing any activity on behalf of a third party, the Account Holder must supply all documentation required by Markit and the request must be approved by Markit.

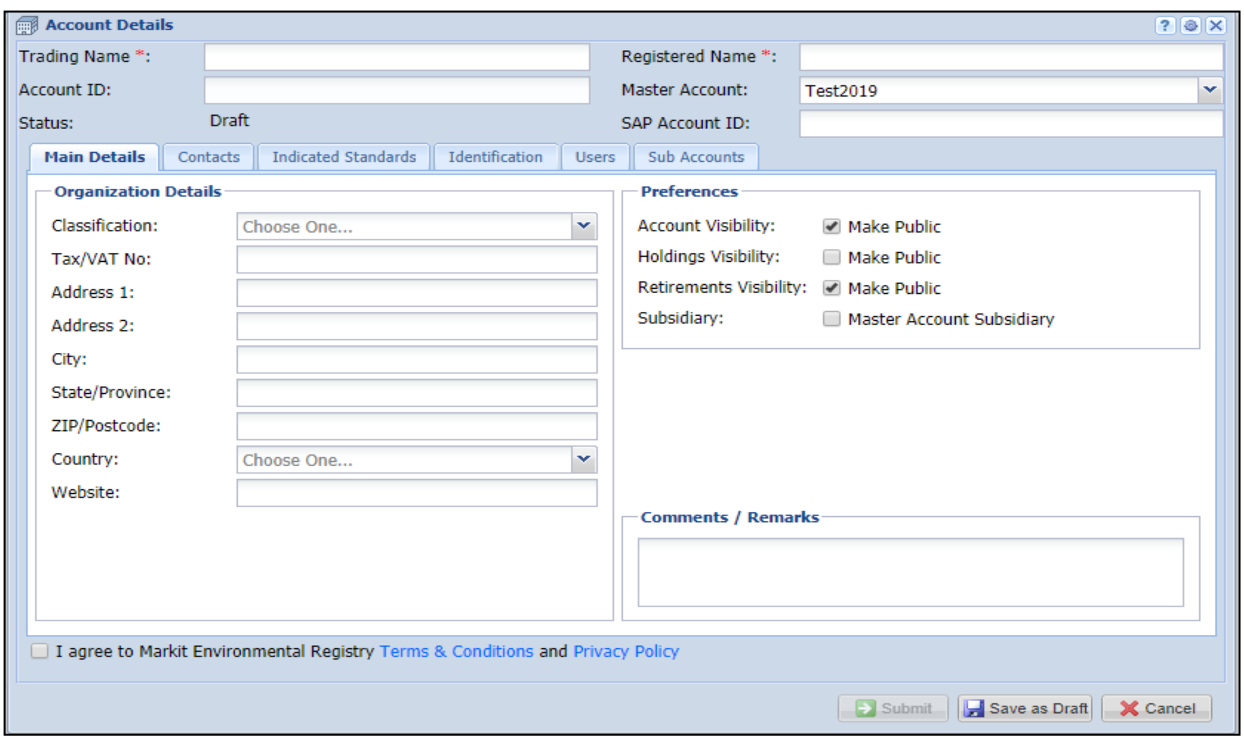
The Project Developer can create sub-account(s) for their buyer(s). The Sub Account feature is not available for Retail Aggregators.

<u>Step 1</u>

- Navigate to the My Account Summary tab.

Under the Accounts heading, click on the Master Account to which the sub-account will be connected.

- The **Account Details** window will appear allowing the user to populate all fields with the new

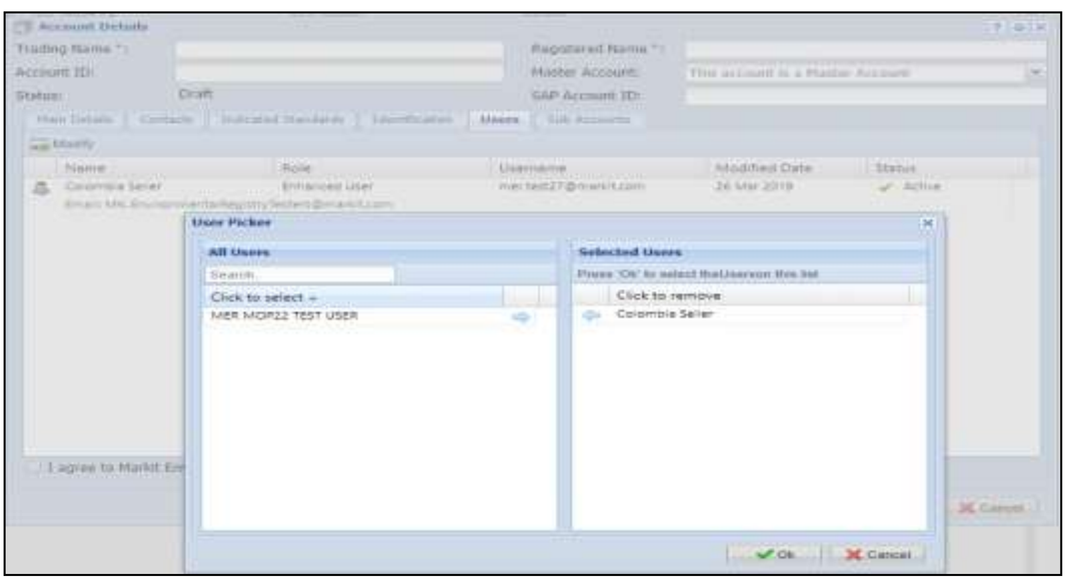


account’s information. The Master Account field will be automatically populated.

Field	Definition
Classification	Classification of the organization based on our account types
Tax/VAT No	Tax or VAT number required for invoicing
Visibility	Check to allow the account name to be publicly visible
Holdings	Check to allow the account’s active holdings to be publicly visible
Retirements	Check to allow the account’s retired credits to be publicly visible
Master Account	Field that is used to connect a sub-account to a master account
Comments/Remarks	Any comments or remarks for the IHS Markit Operations Team

Step 2

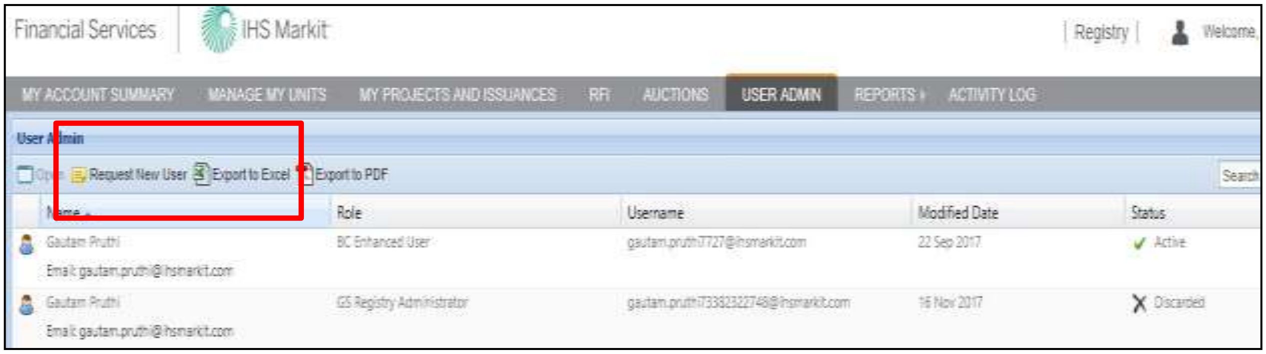
- Navigate to the Users tab of the **Account Details** window.
- To add users to this account, click the Modify button.
- Select a user. The user’s name will move to the right-hand side of the window. Then click **OK.**
- Click the Save button to save all changes that have been made to the account.
- Click the Submit button to submit the account for review by the IHS Markit Operations Team.



- When the account has been approved, it will appear in the Accounts tab as Active.

Adding new users to your account

The User Admin page displays all user information for your account(s). From this page, you can view user information and request a new user.



- Click on Request New User button and complete the form as shown below in screenshot
- Click the Submit button to submit the user's information to the IHS Markit Operations Team for review. The new user will be required to upload a copy of their personal ID as detailed in Please refer to section **How to Upload and Submit Photo ID**