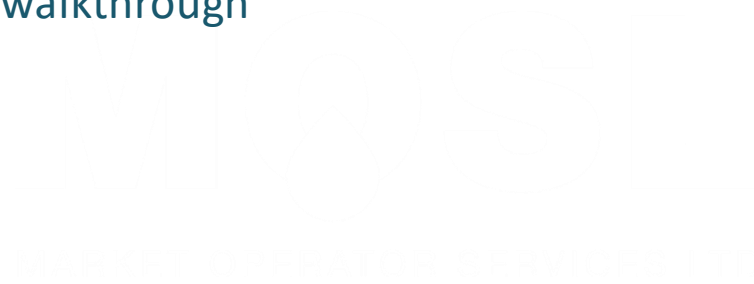


# Operational Advisory Group (OAG) meeting

8 October 2020

# Agenda

1. C1 User Requirements – Transfer in Progress
2. Notification templates
3. New wireframes walkthrough
4. AOB



# 1. C1 User Requirements – Transfer in Progress



# C1 User Requirements – Transfer in Progress

Assumptions on Raising/actioning/visibility of Service Requests;

## Outgoing Retailer:

- ◆ Can raise/cancel service request up to end of business day before transfer date
- ◆ Can carry out any activities allowed by Retailer User (as part of C1 Process) up to end of day before transfer date
- ◆ Receives all notifications of activities as identified in document ([here](#)) up to end of day before transfer date
- ◆ No visibility of any updates to any 'in progress' Service Requests after transfer date **OR**
  - ◆ Visibility of previously raised/'in progress' Service Requests of any status for the SPID will remain visible after the Transfer date
- ◆ No facility to amend any previously submitted information/action any Service Requests for SPIDS which have successfully transferred away

**OAG  
challenges?**

## Need to answer Specific Question

- ◆ Can Outgoing Retailer submit C1 when transfer is in progress ?
  - ◆ Or restrict initiation of new request by Outgoing Retailer during transfer process.

# C1 User Requirements – Transfer in Progress

Assumptions on Raising/actioning/visibility of Service Requests;

## Incoming Retailer:

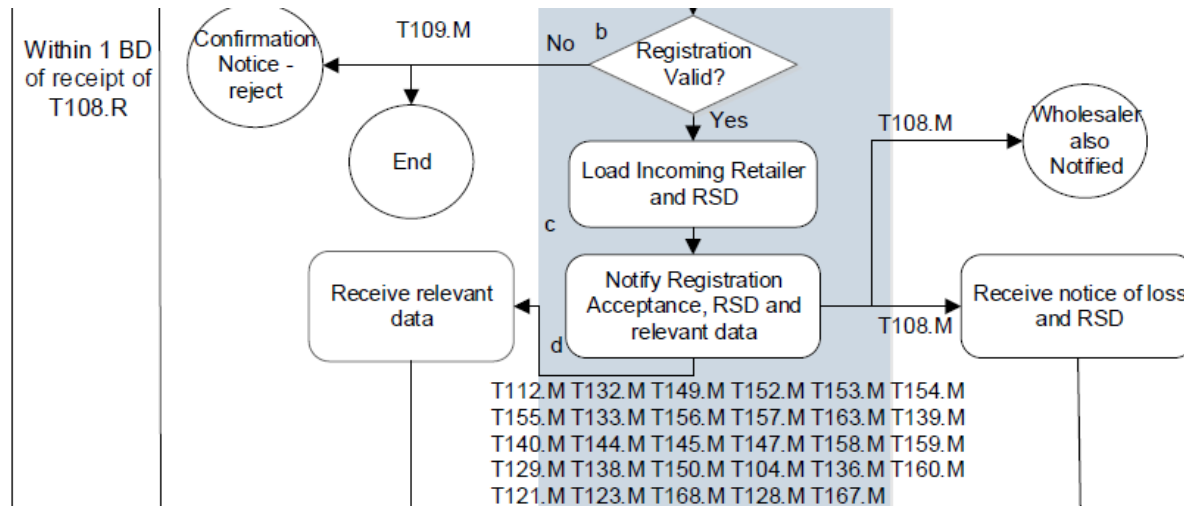
- ◆ Will receive email notification of a Service Request being raised – will have a ‘read only’ view of this in the Bilateral Hub
- ◆ Will receive email notifications of any activities and status changes that occur on a Service Request – will have a ‘read only’ view of the Service Request in the Bilateral Hub
- ◆ Will be able to view all Service Requests relating to that SPID in the Landing Page regardless of Status
- ◆ Will have view of the Service Request in the landing page – identifiable by the ‘requester name’ being the outgoing Retailer
- ◆ Can carry out any activities allowed by a Retailer User (as part of the C1 process) from the transfer date.
- ◆ Cannot amend previous updates and information provided on a Service Request by the outgoing Retailer prior to the Transfer date
- ◆ Will be presented with all Service Requests within the last year regardless of status when raising a new Service Request if applicable

**OAG challenges?**

# HVI assumption

- For HVI, when a valid transfer request submitted (T108.R) all relevant data transactions related to open C1 request will be issued to Incoming Retailer (Similar to CMOS).

When valid T108.R is received, CMOS transactions notifications issued to Incoming Retailer are;



All subsequent .M notification transactions to update Request progress will be issued to Incoming Retailer of the SPID.

## C1 User Requirements – Transfer in Progress

Assumptions on Raising/actioning/visibility of Service Requests;

### 💧 Charges:

If Wholesalers feel that charges apply to a Service Request raised, e.g. the form has been raised in error and they have incurred costs;

- 💧 No changes to be made to the market or the Incoming Retailer who cancels the request after the Transfer date
- 💧 The charge will fall to the Retailer who owns the SPID at the time of closing the Service Request

### **Discuss – is this correct?**

- 💧 Should the outgoing Retailer should get the charge if applicable?
- 💧 If change from status quo, do we recommend code change?

## 2. Notifications



MARKET OPERATOR SERVICES LTD

# Assumptions

- ◆ Notifications by email sent to
  - ◆ Contracted Wholesalers or Retailers depending on the Activity Status.
  - ◆ Other Wholesaler or Retailer
- ◆ Email notifications sent from MOSL Bilateral Hub.
- ◆ On for all parties
  - ◆ No reason to turn off?
- ◆ Other retailer/wholesaler
  - ◆ Yes

**OAG challenges?**

Think about  
3<sup>rd</sup> party

# Assumptions

When?

Transaction	Request Status	Activity Status	Notification sent to Wholesaler (W)/Retailer (R) or both	Lead Heading	Link in email directs User to?
T1A	SUBMITTED	SUBMITTED	W	ACTION REQUIRED	Link to the Action Tab
T2B	IN PROGRESS	ACCEPTED	R	STATUS UPDATE	Link to the Summary Tab
T3	IN PROGRESS	INFO REQUESTED	R	ACTION REQUIRED	Link to the Action Tab
T4	IN PROGRESS	INFO PROVIDED	W	ACTION REQUIRED	Link to the Action Tab
T5	IN PROGRESS	SITE VISIT SCHEDULED	R	STATUS UPDATE	Link to the Summary Tab
T7	Completed	CORRECTIONS COMPLETED	R	ACTION REQUIRED	Link to the Action Tab
T10	CLOSED	CLOSED	W	STATUS UPDATE	Link to the Summary Tab
T10b	CLOSED	SYSTEM CLOSED	W & R	STATUS UPDATE	Link to the Summary Tab
T2a	IN PROGRESS	REJECTED	R	ACTION REQUIRED	Link to the Action Tab
T1B	SUBMITTED	RESUBMITTED	W	ACTION REQUIRED	Link to the Action Tab
T13	CANCELED	CANCELED	W	STATUS UPDATE	Link to the Summary Tab
T7	Completed	CORRECTIONS COMPLETED	R	ACTION REQUIRED	Link to the Action Tab
T3	IN PROGRESS	INFO REQUESTED	R	ACTION REQUIRED	Link to the Action Tab
T11	IN PROGRESS	CORRECTIONS PLAN PROPOSED	R	ACTION REQUIRED	Link to the Action Tab
T8	IN PROGRESS	AGREE PROPOSED PLAN	W	ACTION REQUIRED	Link to the Action Tab
T12	IN PROGRESS	DISAGREE PROPOSED PLAN	W	ACTION REQUIRED	Link to the Action Tab

# Assumptions

## Email Subject

To display the following data items in order with a dash (-) in between each data item:-

- ◆ Bilateral Notification – included in all emails
- ◆ Lead Heading – options of either 'STATUS UPDATE' or 'ACTION REQUIRED'
  - ◆ depending on Activity Status presented in capital letters.
- ◆ Activity Status – display Activity Status
- ◆ Service Request ID – Insert unique Service request ID
- ◆ Process – insert process name, e.g. C1

## Email Main Text

Dear (Insert Retailer or Wholesaler company name)

Bilateral Notification - STATUS UPDATE - Site visit scheduled - F9168C5E-CEB2-4faa-B6BF-329BF39FA1E4 - C1

There has been an activity on a Service Request in the Bilateral Hub. Please follow the link below to review.

<https://xd.adobe.com/view/7169ec02-9c6b-4568-ace6-a60c30fa68f0-243a/?hints=off> – Link to take the user to either the Action tab or the Summary page depending on Lead Heading (in Email subject table data fields below).

# Assumptions

## Signature?

Kind Regards

MOSL

- Necessary?
- Copyright disclaimer – necessary?

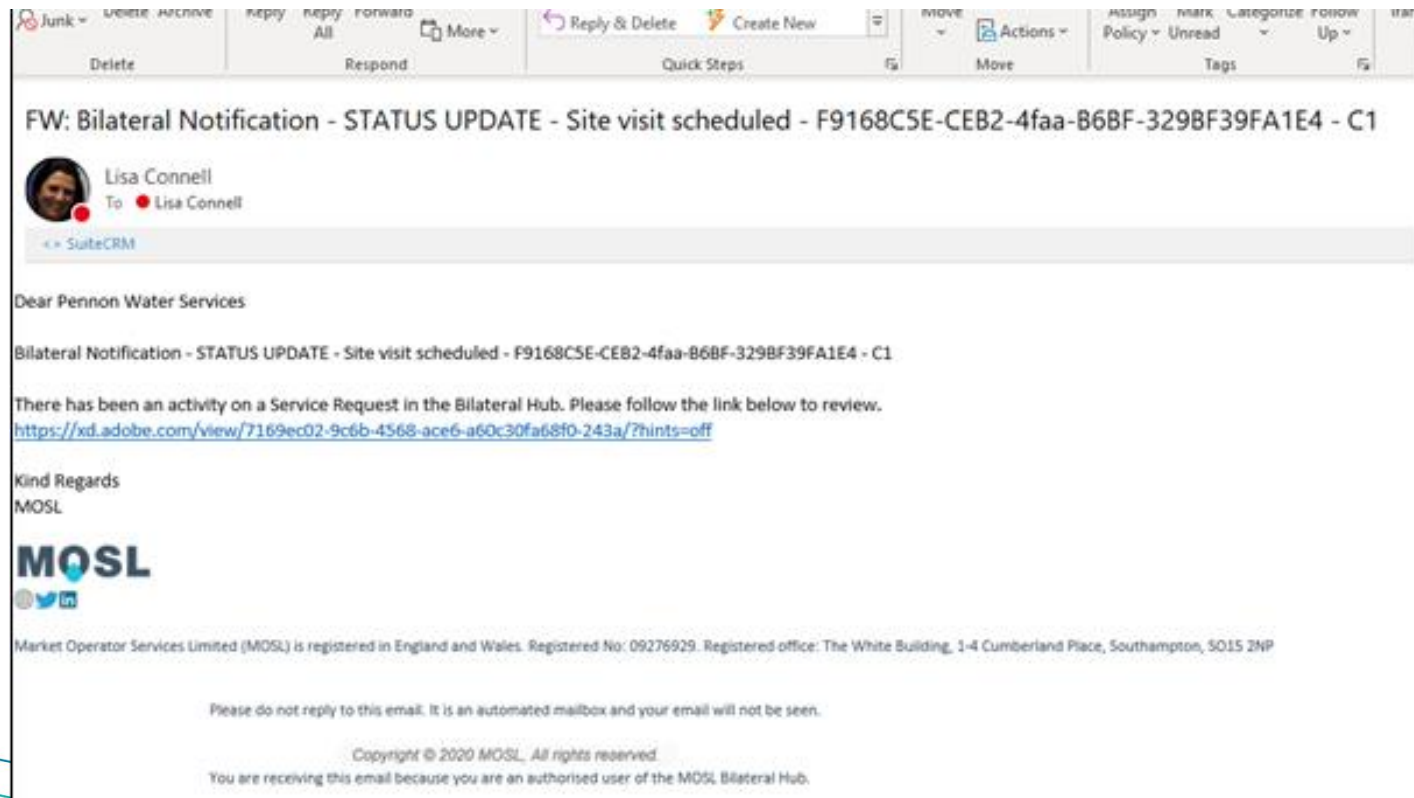
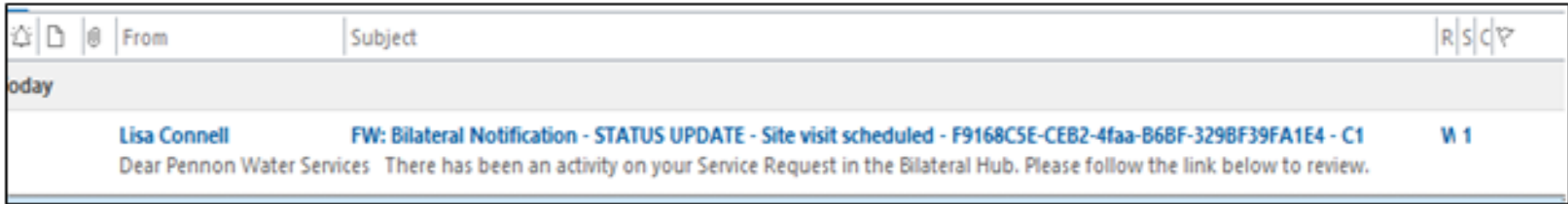
## Reply?

- No reply warning 'Please do not reply to this email. It is an automated mailbox and your email will not be seen'
- What contact details if any at all?

## During transfer period (incoming retailer)

- Yes

# Look and feel



### 3. Wireframe walk-through

## 4. AOB

