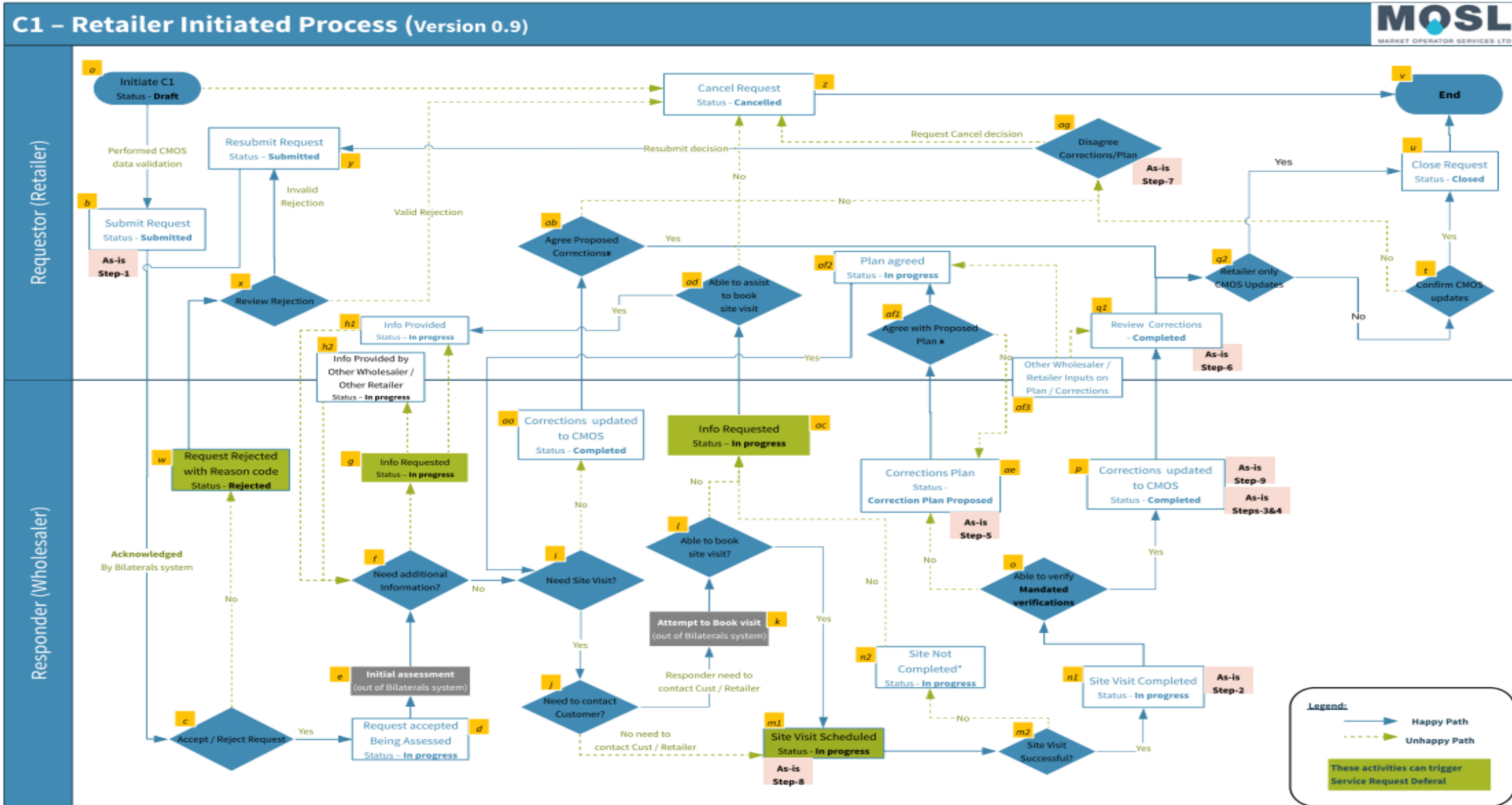


Bilateral Transactions Programme Operational Advisory Group (OAG)

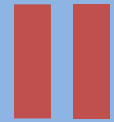
5 November 2020 Meeting
High level deferrals and reporting

C1 process flow



Deferral - point of principle

Deferral – actioned by transaction through the process flow



Auto Deferral (Pause)

Reject or request more info Pages



Optional Deferral

Pre site visit booked

Site visit booked delayed beyond SLA

Site visit cancel

Deferral scenarios



Site visit complete. 2nd visit required to eliminate unit 2 from enquiry. Need retailer assistance for contact details. Wholesaler cannot proceed until retailer replies.

Require more info (auto pause) or correction plan (end of SLA no deferral not needed)



Wholesaler attends site. Customer fails to attend. Wholesaler contacts customer and agrees another appointment for 5 days' time.

Site visit not completed; customer cancel (allowed deferral) SLA will be backdated (maximum back to submission date - tbc)



Wholesaler attends site. Customer has obstructed meter (EG pallets on meter). Customer agrees to remove and advise wholesaler when they can return to complete task, Wholesaler awaits further customer contact.

Site visit not completed; customer cancel (allowed deferral) SLA will be backdated (maximum back to submission date - tbc)



Wholesaler unable to contact customer to book appointment. Wholesaler carries out numerous attempts and is successful. 3 attempts over 3 days.

Request more info



Wholesaler visits site. To complete the verification, a follow-on excavation is needed in the highway. The highways permit lead time causes the wholesaler to breach the KPI.

Allowed deferral before site visit booked

Deferral questions

- Lost days: days to claim back for deferral, e.g. if customer 'no show'
- Will the hub use effective from dates or system received dates? For example, if we incur a delay today that needs to be a deferral or we move to the next step today in a process but do not sync with the hub or submit the transaction to the following day, what date would the system use?

◆ OPS Reporting

- ◆ Requests started within a reporting period
- ◆ Requests tasks completed within the reporting period (deferred and non-deferred)
- ◆ The number of tasks completed within the time permitted (in SLA)
- ◆ The number of requests outstanding at the end of the reporting period that are outside the time permitted; and
- ◆ The number of requests outstanding at the end of the reporting period that are extremely outside the time permitted.
- ◆ Requests completed late & extremely late within the reporting period
- ~~◆ The percentage of Completed within time Tasks with respect to the total number of Completed Tasks~~
- ◆ The number of Rejected requests rejected within the reporting period
- ◆ The number of requests outstanding at the end of the reporting period
- ◆ The number of requests outstanding at the end of the reporting period that are within the time permitted

◆ Non-OPS performance

- ◆ The report could show the time elapsed between actions or Activity Status' (hand-offs). This will allow for any future OPS changes and can monitor any behaviour.

- ◆ RAG or jeopardy management report
 - ◆ This report will show all open cases in order of oldest to newest. It will show the number of cases/requests that have failed, are on the day of failing or, the day before failing the SLA and 2 days before failing and 3 days+ failing their SLA
- ◆ Rejected task and cancelled by a retailer
 - ◆ Report to show number of rejected requests by the wholesaler and then cancelled by the Retailer.
- ◆ Request completed within time and outside time when site visit not required
 - ◆ This report will monitor the number of requests being completed without site visits inside and outside of SLA.
- ◆ Deferrer after 5 days
 - ◆ This report will show if a wholesaler defers a request pre-site visit, after the 5 (bd) day submission report
- ◆ Multiple deferrals
- ◆ Number of deferral types – record what type of deferrals are being used the most
 - ◆ This report will show the number of deferrals placed on one particular request.
 - ◆ It will show the total number of differed days, lapsed days (accumulative days from submission date), number of deferred transactions.