

B5 Key Information  
Bilaterals Programme

## State transitions

Current Request Status	Current Activity Status	Requestor Next Activities	Wholesaler Next Activities	Hub Activity Options
<ul style="list-style-type: none"> <li>SUBMITTED</li> </ul>	<ul style="list-style-type: none"> <li>SUBMITTED</li> </ul>	<ul style="list-style-type: none"> <li>CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>ACCEPTED</li> <li>REJECTED</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>ACCEPTED</li> <li>CANCELLED</li> </ul>	SLA starts on submission.
<ul style="list-style-type: none"> <li>SUBMITTED</li> </ul>	<ul style="list-style-type: none"> <li>RESUBMITTED</li> </ul>	<ul style="list-style-type: none"> <li>CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>ACCEPTED</li> <li>REJECTED</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>ACCEPTED</li> <li>CANCELLED</li> </ul>	
<ul style="list-style-type: none"> <li>IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>ACCEPTED</li> </ul>	<ul style="list-style-type: none"> <li>CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>INFO REQUESTED</li> <li>VISIT SCHEDULED</li> <li>COMPLETED</li> <li>PREPARING EXCHANGE</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>CUST INFO REQUESTED</li> <li>VISIT SCHEDULED</li> <li>COMPLETED</li> <li>PREPARING EXCHANGE</li> </ul>	

Current Request Status	Current Activity Status	Requestor Next Activities	Wholesaler Next Activities	Hub Activity Options
<ul style="list-style-type: none"> <li>IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>REJECTED</li> </ul> <p>Only for Retailer requested</p>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>CANCELLED</li> <li>RESUBMITTED</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>N/A</li> </ul>		
<ul style="list-style-type: none"> <li>IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>INFO REQUESTED</li> </ul>	<ul style="list-style-type: none"> <li>INFO PROVIDED</li> <li>CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>INFO PROVIDED</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>CLOSED</li> </ul> <p>If no status change within 15 BDs</p>
<ul style="list-style-type: none"> <li>IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>CUST INFO REQUESTED</li> </ul>	<ul style="list-style-type: none"> <li>CUST INFO PROVIDED</li> <li>CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>N/A</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>CUST INFO PROVIDED</li> </ul>	<ul style="list-style-type: none"> <li>CLOSED</li> </ul> <p>If no status change within 15 BDs</p>
<ul style="list-style-type: none"> <li>IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>INFO PROVIDED</li> </ul>	<ul style="list-style-type: none"> <li>CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>INFO REQUESTED</li> <li>PREPARING EXCHANGE</li> <li>VISIT SCHEDULED</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>N/A</li> </ul>	
<ul style="list-style-type: none"> <li>IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>CUST INFO PROVIDED</li> </ul>	<ul style="list-style-type: none"> <li>CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>N/A</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>CUST INFO REQUESTED</li> <li>PREPARING EXCHANGE</li> <li>VISIT SCHEDULED</li> </ul>	

Current Request Status	Current Activity Status	Requestor Next Activities	Wholesaler Next Activities	Hub Activity Options
<ul style="list-style-type: none"> <li>▪ IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>▪ VISIT SCHEDULED</li> </ul>	<ul style="list-style-type: none"> <li>▪ CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>▪ PREPARING EXCHANGE</li> <li>▪ COMPLETED</li> <li>▪ INFO REQUESTED</li> <li>▪ VISIT NOT COMPLETED</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>▪ PREPARING EXCHANGE</li> <li>▪ COMPLETED</li> <li>▪ CUST INFO REQUESTED</li> <li>▪ VISIT NOT COMPLETED</li> </ul>	
<ul style="list-style-type: none"> <li><del>▪ IN PROGRESS</del></li> </ul>	<ul style="list-style-type: none"> <li><del>▪ INITIAL SITE VISIT COMPLETE</del></li> </ul>	<ul style="list-style-type: none"> <li><del>▪ CANCELLED</del></li> </ul>	<ul style="list-style-type: none"> <li><del>▪ PREPARING EXCHANGE</del></li> <li><del>▪ SITE VISIT RESULT</del></li> <li><del>▪ INFO REQUESTED</del></li> </ul>	
<ul style="list-style-type: none"> <li>▪ IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>▪ PREPARING EXCHANGE</li> </ul>	<ul style="list-style-type: none"> <li>▪ CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>▪ VISIT SCHEDULED</li> <li>▪ INFO REQUESTED</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>▪ VISIT SCHEDULED</li> <li>▪ CUST INFO REQUESTED</li> </ul>	
<ul style="list-style-type: none"> <li>▪ COMPLETED</li> </ul>	<ul style="list-style-type: none"> <li>▪ COMPLETED</li> </ul>	<ul style="list-style-type: none"> <li>▪ CLOSED</li> <li>▪ CANCELLED</li> <li>▪ RESUBMITTED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>▪ N/A</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>▪ CANCELLED</li> </ul>	

Current Request Status	Current Activity Status	Requestor Next Activities	Wholesaler Next Activities	Hub Activity Options
<ul style="list-style-type: none"> <li>IN PROGRESS</li> </ul>	<ul style="list-style-type: none"> <li>VISIT NOT COMPLETED</li> </ul>	<ul style="list-style-type: none"> <li>CANCELLED</li> </ul>	<p>Retailer requested:</p> <ul style="list-style-type: none"> <li>INFO REQUESTED</li> <li>VISIT SCHEDULED</li> </ul> <p>Wholesaler requested:</p> <ul style="list-style-type: none"> <li>CUST INFO REQUESTED</li> <li>VISIT SCHEDULED</li> </ul>	
<ul style="list-style-type: none"> <li>CANCELLED</li> </ul>	<ul style="list-style-type: none"> <li>CANCELLED</li> </ul>			SLA end on completion
<ul style="list-style-type: none"> <li>CLOSED</li> </ul>	<ul style="list-style-type: none"> <li>CLOSED</li> </ul>			SLA end on completion

## Reason codes

### Section SC.7: Site visit cancelled

ID	Field Name / Label	Type / Values	Validation / Rules	Actions
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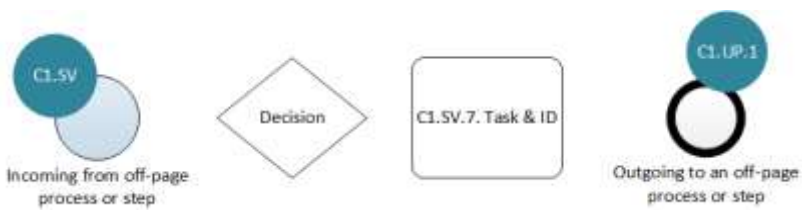
ID	Field Name / Label	Type / Values	Validation / Rules	Actions
1	Reason	Drop down list of reasons: <ul style="list-style-type: none"> <li>▪ Customer unavailable</li> <li>▪ Retailer unavailable</li> <li>▪ 3rd party involvement</li> <li>▪ 3rd party or agency consent</li> <li>▪ Other regulatory consents</li> <li>▪ Extreme weather</li> <li>▪ Force majeure</li> <li>▪ Further information required from retailer to proceed</li> </ul>	Mandatory, one item to be selected.	Data items to persist on form exit and save into history.

*Section SC.8: Deferral*

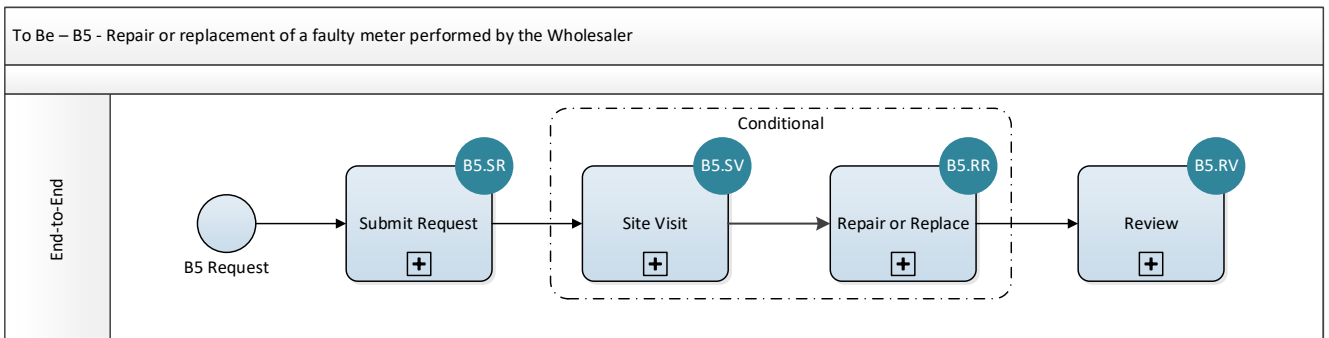
ID	Field Name / Label	Type / Values	Validation / Rules	Actions
1	Reason	Drop down list of reasons: <ul style="list-style-type: none"> <li>▪ Customer unavailable</li> <li>▪ Retailer unavailable</li> <li>▪ 3rd party involvement</li> <li>▪ 3rd party or agency consent</li> <li>▪ Other regulatory consents</li> <li>▪ Extreme weather</li> <li>▪ Force majeure</li> <li>▪ Further information required from retailer to proceed</li> </ul>	Mandatory, one item to be selected.	Data items to persist on form exit and save into history.

## Process flow

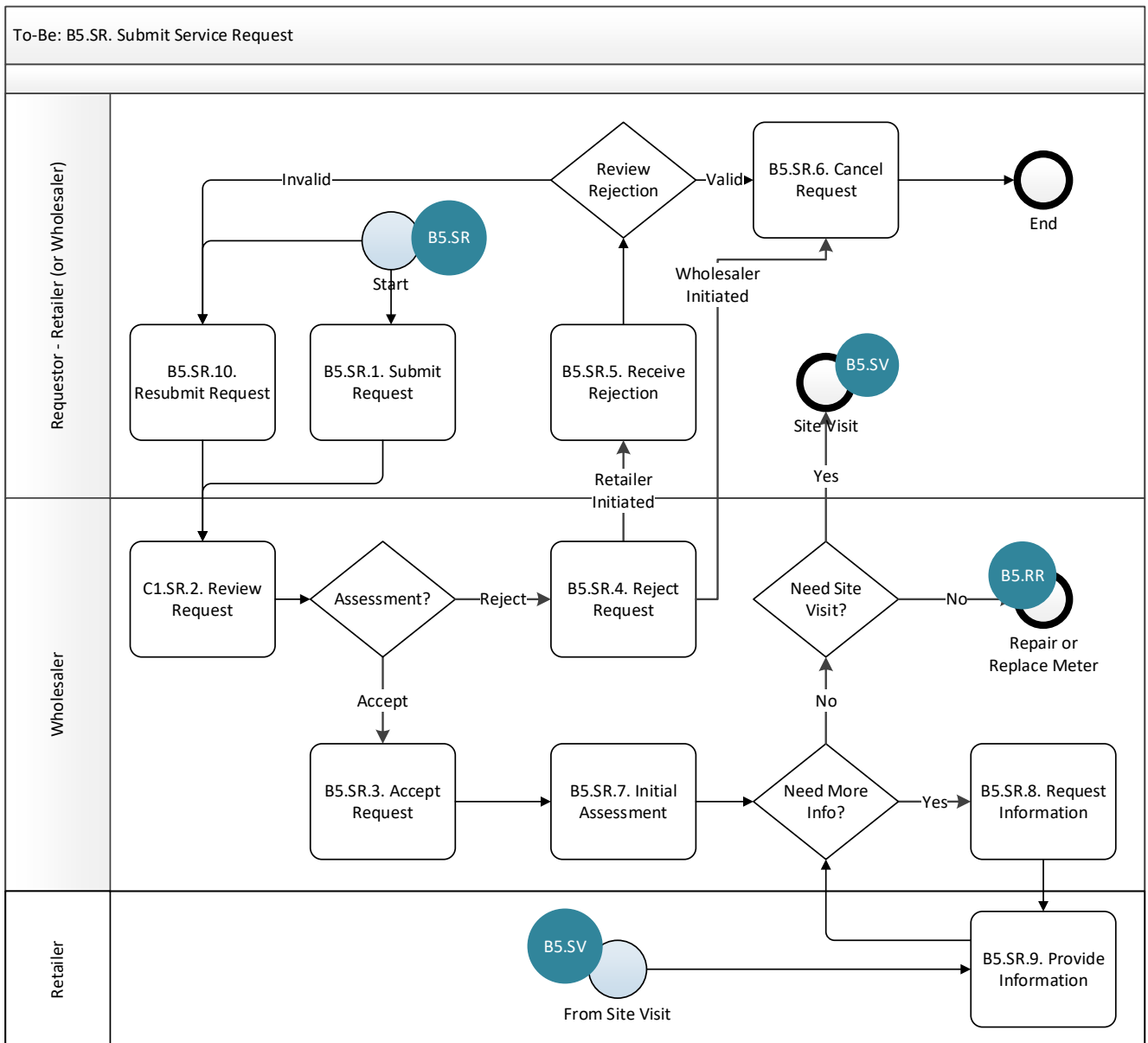
### Legend



### High-Level Overview



## Submit Service Request

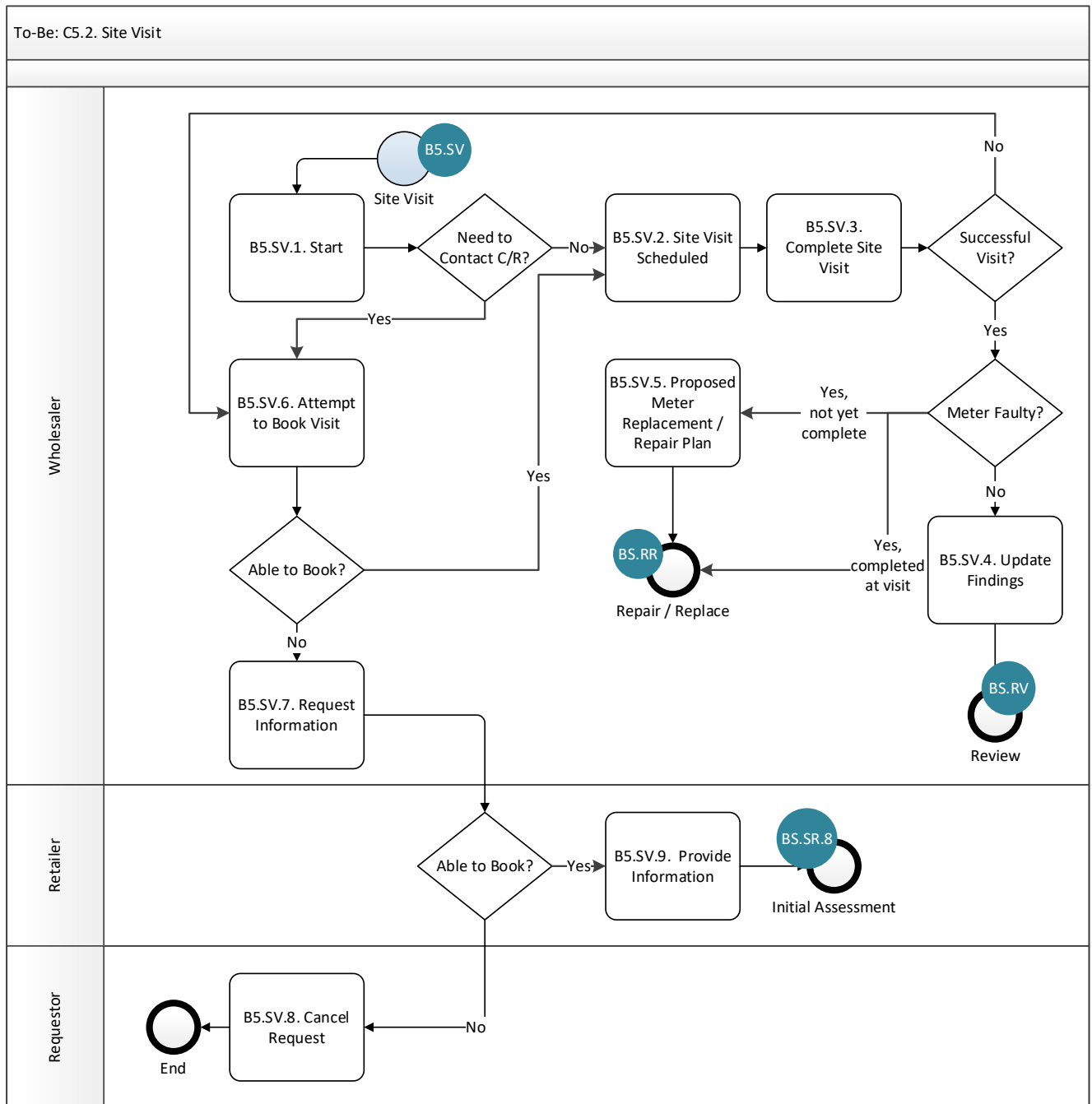


ID	Step	Actor	Narrative
B5.SR.1.	Submit Request	Retailer or Wholesaler	<ul style="list-style-type: none"> <li>As-Is step</li> <li>CMOS data validation</li> <li>Acknowledged by Bilaterals system</li> <li>Request Status = Submitted / Activity Status = Submitted</li> </ul>

ID	Step	Actor	Narrative
B5.SR.2.	Review Request	Wholesaler	<ul style="list-style-type: none"> <li>▪ Eyeball assessment of request</li> <li>▪ Review Request: <ul style="list-style-type: none"> <li>○ Accepted → B5.SR.3.</li> <li>○ Rejected, Retailer-requested request → B5.SR.4.</li> <li>○ Rejected, Wholesaler-requested request → B5.SR.6.</li> </ul> </li> </ul>
B5.SR.3.	Accept Request	Wholesaler	<ul style="list-style-type: none"> <li>▪ Request Status = In progress / Activity Status = Accepted</li> <li>▪ → B5.SR.7.</li> </ul>
B5.SR.4.	Reject Request	Wholesaler	<ul style="list-style-type: none"> <li>▪ Reject, with reason code.</li> <li>▪ Request Status = In progress / Activity Status = Rejected</li> </ul>
B5.SR.5.	Receive Rejection	Retailer	<ul style="list-style-type: none"> <li>▪ Review: <ul style="list-style-type: none"> <li>○ Valid → B5.SR.6.</li> <li>○ Invalid → B5.SR.10. (resubmit request)</li> </ul> </li> </ul>
B5.SR.6.	Cancel Request	Requestor	<ul style="list-style-type: none"> <li>▪ Status = Cancelled / Cancelled</li> </ul>
B5.SR.7.	Initial Assessment	Wholesaler	<ul style="list-style-type: none"> <li>▪ Outside of Bilaterals system</li> <li>▪ Need more information: <ul style="list-style-type: none"> <li>○ If a Wholesaler raised this request, then this will be 'Yes' on account of consent and customer contact details will not have been entered upon submission</li> <li>○ Yes → B5.SR.8.</li> <li>○ No → continue to:</li> </ul> </li> <li>▪ Need Site Visit? <ul style="list-style-type: none"> <li>○ Yes → B5.SV. (site visit)</li> <li>○ No (meter already repaired or replaced) → B5.RR. (repair or Replace)</li> </ul> </li> </ul>
B5.SR.8.	Request Information	Wholesaler	<ul style="list-style-type: none"> <li>▪ Retailer submitted → Request Status = In progress / Activity Status = Info Requested</li> <li>▪ Wholesaler submitted → Request Status = In progress / Activity Status = Cust Info Requested</li> </ul>

ID	Step	Actor	Narrative
B5.SR.9.	Provide Information	Retailer	<ul style="list-style-type: none"> <li>▪ Retailer submitted → Request Status = In progress / Activity Status = Info Provided</li> <li>▪ Wholesaler submitted → Request Status = In progress / Activity Status = Cust Info Provided</li> <li>▪ → return to B5.SR.6. (reassess need for further information)</li> </ul> <p>Note: other interested party – Retailer / Wholesaler could provide directly into the comments.</p>
B5.SR.10.	Resubmit Request	Retailer (only)	<ul style="list-style-type: none"> <li>▪ As-Is step</li> <li>▪ Request Status = Submitted / Activity Status = Resubmitted</li> <li>▪ Go → B5.SR.2. (review)</li> </ul>

## Site Visit

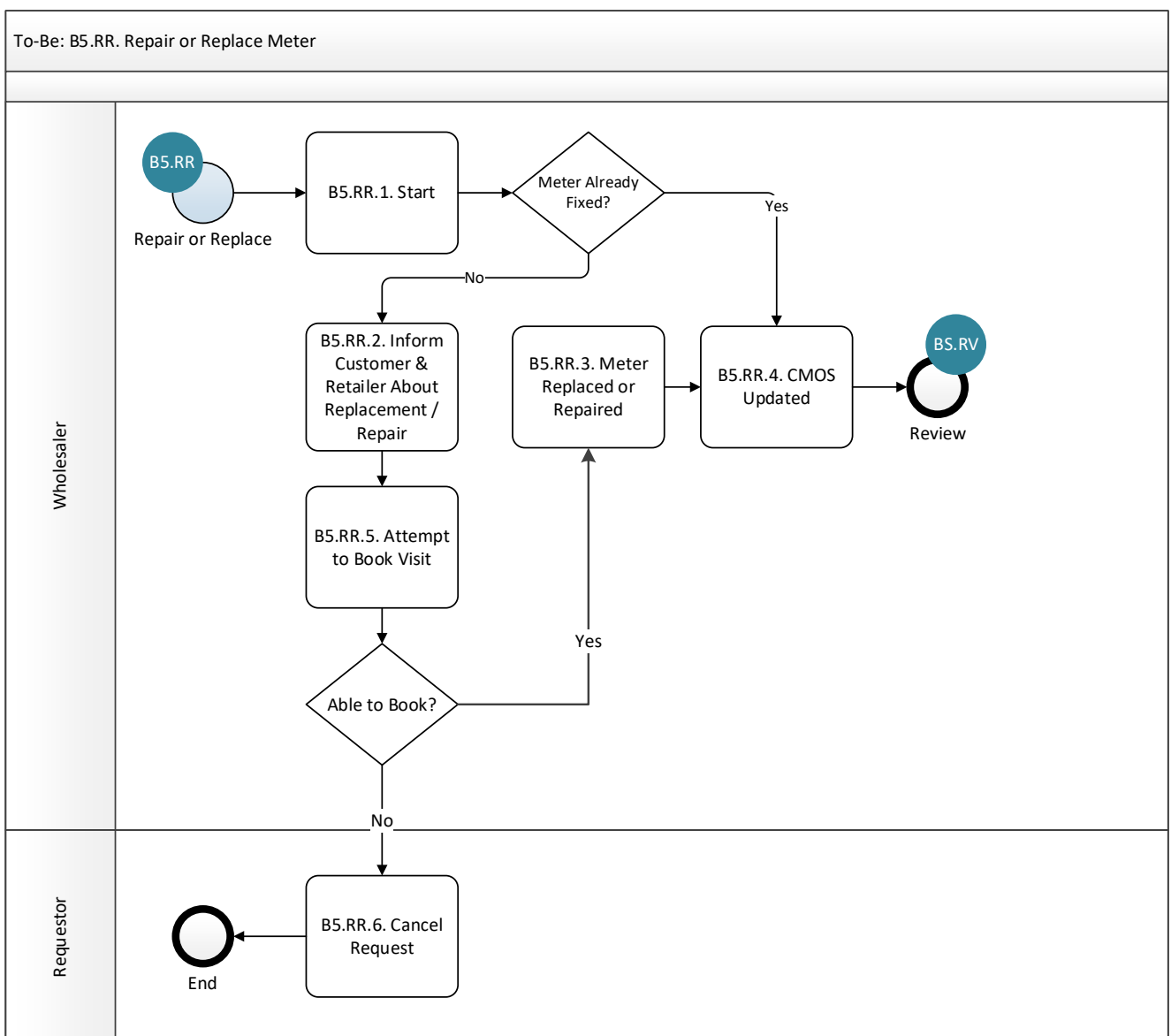


ID	Step	Actor	Narrative
B5.SV.1.	Start	Wholesaler	<ul style="list-style-type: none"> <li>▪ Need to contact customer or retailer:               <ul style="list-style-type: none"> <li>○ Yes → B5.SV.2.</li> <li>○ No → B5.SR.3.</li> </ul> </li> </ul>

ID	Step	Actor	Narrative
B5.SV.2.	Site Visit Scheduled	Wholesaler	<ul style="list-style-type: none"> <li>▪ As-Is step</li> <li>▪ Request Status = In progress / Activity Status = Visit Scheduled</li> </ul>
B5.SV.3.	Complete Site Visit	Wholesaler	<ul style="list-style-type: none"> <li>▪ As-Is step</li> <li>▪ Was the visit successful?               <ul style="list-style-type: none"> <li>○ No → B5.SV.6. (rebook it)</li> <li>○ Yes → continue:</li> </ul> </li> <li>▪ Request Status = In progress / Activity Status = Preparing Exchange</li> <li>▪ Determine if meter is faulty:               <ul style="list-style-type: none"> <li>○ Yes (x2) → B5.RR. (repair / replace, including already done).</li> <li>○ No → B5.RV. (review)</li> </ul> </li> </ul>
B5.SV.4.	Update Site Visit Findings	Wholesaler	<ul style="list-style-type: none"> <li>▪ As-Is step</li> <li>▪ Request Status = Completed / Activity Status = Completed</li> <li>▪ → B5.RV. (review)</li> </ul>
B5.SV.5.	Proposed Meter Replacement / Repair Plan	Wholesaler	<ul style="list-style-type: none"> <li>▪ As-Is step</li> <li>▪ Status = In progress / Activity Status = Preparing Exchange</li> <li>▪ → B5.3 (repair or replace)</li> </ul>
B5.SV.6.	Attempt to Book Visit	Wholesaler	<ul style="list-style-type: none"> <li>▪ Outside of Bilaterals system</li> <li>▪ Able to book:               <ul style="list-style-type: none"> <li>○ Yes → B5.SR.7.</li> <li>○ No → B5.SV.7:</li> </ul> </li> </ul>
B5.SV.7.	Request Information	Wholesaler	<ul style="list-style-type: none"> <li>▪ Retailer submitted → Request Status = In progress / Activity Status = Info Requested</li> <li>▪ Wholesaler submitted → Request Status = In progress / Activity Status = Cust Info Requested</li> <li>▪ Able to book:               <ul style="list-style-type: none"> <li>○ Yes → B5.SR.7.</li> <li>○ No → B5.SV.8.</li> </ul> </li> </ul>
B5.SV.8.	Cancel Request	Requestor	<ul style="list-style-type: none"> <li>▪ Request Status = Cancelled / Activity Status = Cancelled</li> </ul>

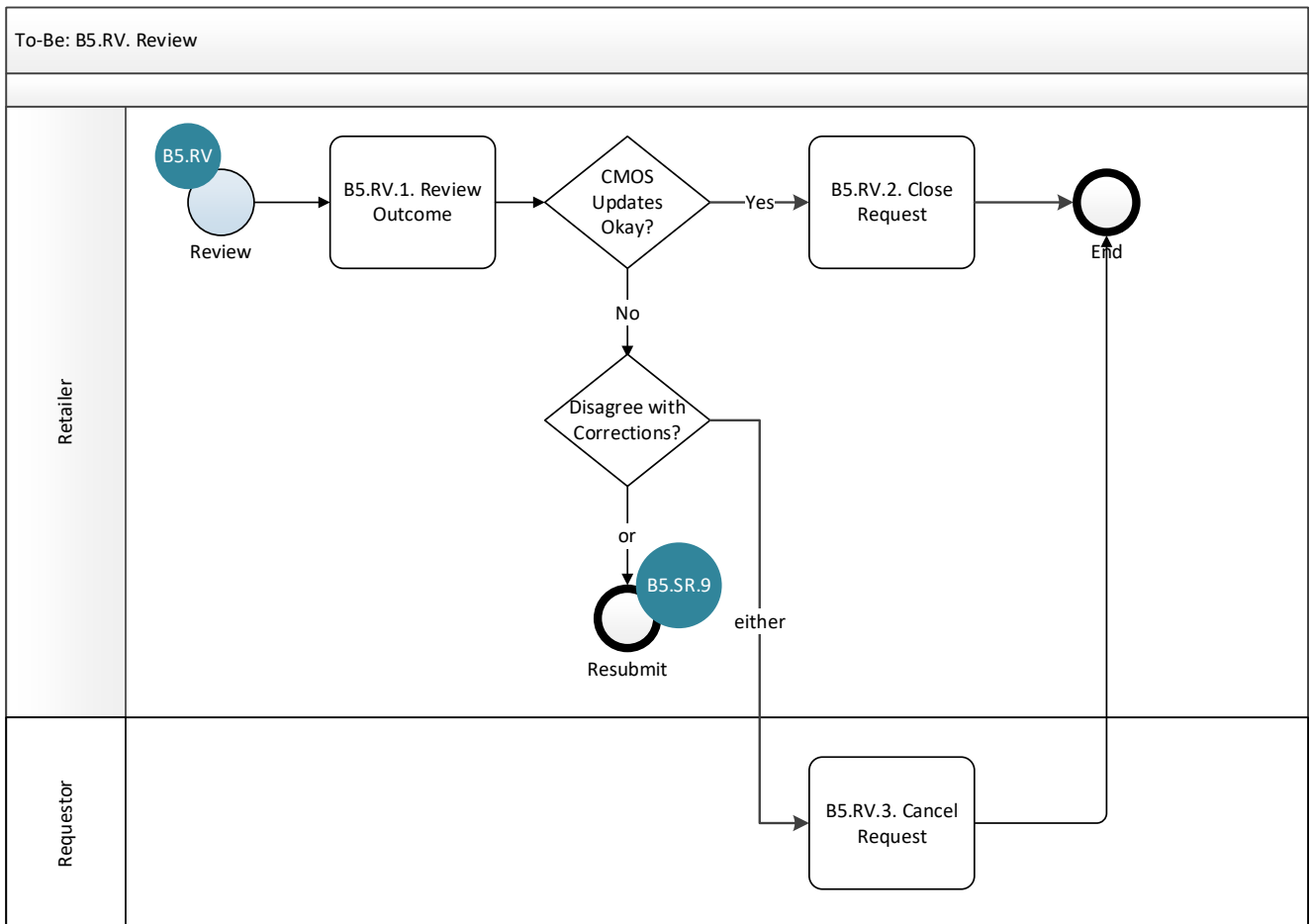
ID	Step	Actor	Narrative
B5.SV.9.	Provide Information	Retailer	<ul style="list-style-type: none"> <li>▪ Retailer submitted → Request Status = In progress / Activity Status = Info Provided</li> <li>▪ Wholesaler submitted → Request Status = In progress / Activity Status = Cust Info Provided</li> <li>▪ → return to B5.SR.8 (information provided)</li> </ul>

### Repair or Replace



ID	Step	Actor	Narrative
B5.RR.1.	Start	Wholesaler	<ul style="list-style-type: none"> <li>▪ Has the meter already been fixed (repaired or replaced)?               <ul style="list-style-type: none"> <li>○ Yes → B5.RR.4.</li> <li>○ No → B5.RR.2.</li> </ul> </li> </ul>
B5.RR.2.	Inform Customer & Retailer About Repair / Replacement	Wholesaler	<ul style="list-style-type: none"> <li>▪ Outside of Bilaterals system</li> <li>▪ → B5.RR.5. (book)</li> </ul>
B5.RR.3.	Meter Replaced or Repaired	Wholesaler	<ul style="list-style-type: none"> <li>▪ Outside of Bilaterals system</li> </ul>
B5.RR.4.	CMOS Updated	Wholesaler	<ul style="list-style-type: none"> <li>▪ Request Status = Completed / Activity Status = Completed</li> <li>▪ → B5.RV. (review)</li> </ul>
B5.RR.5.	Attempt to Book Visit	Wholesaler	<ul style="list-style-type: none"> <li>▪ Outside of Bilaterals system</li> <li>▪ Able to book:               <ul style="list-style-type: none"> <li>○ Yes → B5.RR.3. (do the repair / replace)</li> <li>○ No → B5.RR.6. (cancel)</li> </ul> </li> </ul>
B5.RR.6.	Cancel Request	Requestor	<ul style="list-style-type: none"> <li>▪ Request Status = Cancelled / Activity Status = Cancelled</li> </ul>

## Review



ID	Step	Actor	Narrative
B5.RV.1.	Review Outcome	Retailer	<ul style="list-style-type: none"> <li>▪ CMOS updates okay?               <ul style="list-style-type: none"> <li>○ Yes → B5.RV.2.</li> <li>○ No → continue:</li> </ul> </li> <li>▪ Disagree with corrections – so...               <ul style="list-style-type: none"> <li>○ Either → B5.RV.3 (cancel); or</li> <li>○ Or → B5.SR.9. (resubmit request)</li> </ul> </li> </ul>
B5.RV.2.	Close Request	Retailer	<ul style="list-style-type: none"> <li>▪ Request Status = Closed / Activity Status = Closed</li> </ul>
B5.RV.3.	Cancel Request	Requestor	<ul style="list-style-type: none"> <li>▪ Request Status = Cancelled / Activity Status = Cancelled</li> </ul>