

## OAG G2 Subgroup Meeting 30<sup>th</sup> June 14:00-16:00 MS Teams

Notes and high-level requirements captured

**Discussion: All applications for consent whether temporary or permanent including less than 6 months need to follow process G2 and are subject to OPS reporting. A DPID for <6 months is optional.**

It was agreed by the group that all applications for consent should go through the hub. It wouldn't be efficient or desired to process a number of applications through other systems.

The group discussed how it could be beneficial to help avoid creating duplicates for the hub to confirm whether a DPID already existed or not on submission of a new request.

The group discussed that it can be confusing when each wholesaler has a different policy. It was agreed that this should continue to be part of policy but to help with clarity and ease of use that a matrix of who does what would help retailers and their customers to avoid wasted applications.

If a request still came through that didn't need a consent, a valid output would be no consent required.

Requirements:

The ability to initiate and process all G2s through the LVI/HVI.
The ability for LVI/HVI to flag whether there is an existing active DPID on submission of a new request.
The ability to have a decision outcome of no consent required.

*Action: OAG to pass matrix suggestion to RWG for further discussion/development.*

**Discussion: G2 is unique in that it is the only process in the code that can be raised by 2 forms – G/02 and G/03.**

Discussed original reason as to why form G/03 was created as part of a previous code change. Primary reason was to create an easier to follow form for issue to customers specifically geared towards temporary consents.

All agreed that a similar approach was needed to still deliver the improvements from the previous code change.

The group discussed the categorisation of consent applications that is currently captured in forms EG permanent, temporary etc. It was suggested that this would be useful to see this at the start of the process as this will in many cases determine the action required by the wholesaler based on their internal processes.

The group were in support of a dynamic field approach (fields appear conditionally based on other selections) if the data items of form G/02 and G/03 came back together as one in the LVI.

Discussed the process that occurs before a retailer submits the request to the wholesaler. It was agreed that it would be useful for the wholesaler to know that there was a pending request that may need to be returned to a customer to update before the wholesaler is formally asked via the hub to either accept or reject the request.

It was discussed that the customer is responsible for providing the correct information in the form. Retailers then have to key in this data as part of the request. Any changes to the information will need to be provided by the customer. The group discussed that it would be beneficial to avoid this duplication of effort where possible.

Requirements:

The ability to submit the same HVI transaction for either temporary or permanent consent applications.
The ability for the LVI interface to only show the relevant fields when raising a request (fields from either G02 or G03) based on the user's initial selection of either temporary, multisite or permanent.
The ability for HVI transactions to validate whether data items are mandatory or not based on the data item populated for temporary/permanent EG Data item supplied "Permanent", make all data items from G02 mandatory where applicable, "Temporary" make all data items from G03 mandatory where applicable.
The ability to view in the hub the subtype of the request in a prominent place EG Permanent Application, Temporary Application, Multisite Activity etc.
The ability to issue a G02 or G03 form to a customer.
The ability to upload a G02 or G03 form completed by the customer in the hub to create a new request. The data captured in the G02 / G03 template to prepopulate the LVI create request fields.
The ability to create draft forms that are still awaiting further action/edit before submission that are also visible to the responder.

*Action: OAG to review and confirm application subtypes*

**Discussion: G2 can be initiated by the SPID holding retailer, another retailer/3<sup>rd</sup> party or the customer/wholesaler.**

**Discussion: Applications from the customer or another retailer, should involve the SPID holding retailer.**

It was discussed that this is a valid scenario and the applying retailer should be responsible for any non-primary charges. The SPID holding retailer should be kept informed.

Customers would always be able to apply to the wholesaler direct as per WIA. This cannot be changed.

Requirements:

The ability for a retailer who is not the SPID holder to initiate a G2 request.
The ability for the SPID holder to view and comment on the request as an Associated Trading Party.

**Discussion: Applications from the customer should be signed by the retailer.**

**Discussion: Applications for consent need to be signed by the customer.**

It was discussed by the group that it would be beneficial to use e signatures for customer and retailer declarations provided that there were no legal issues with the requirements of the WIA. This would eliminate the need for paper-based approaches in what should be a digitised approach.

The group discussed how forms can be exchanged on many occasions between wholesaler, retailer and customer. Any change to a part of the form would likely result in the need for a new declaration and retailers were limited in what they could change on behalf of the customer in the absence of another declaration.

Requirements:

The ability to capture e signatures including signatures of customers.
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The ability to share editable documents between wholesaler, retailer and customer.
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**Discussion: A customer may apply to the wholesaler and may not have a SPID – New connection, gap site etc.**

All agreed that this was a valid scenario however there were a few issues identified with the current process.

It was discussed that in the absence of a retailer a customer may struggle to find a retailer who is willing to take on the application. This could cause frustration for the customer. It was suggested that a retailer opt in could be beneficial in this situation to help customers.

A discussion was had around whether a SPID was required or not and what the criteria would be EG a maintenance company requesting consent for an activity on a communal system supplying 5 SPIDs, a flushing activity etc.

All agreed that there could be valid scenarios where a SPID may not be required or is impractical to create.

It was suggested that the 6 month temporary application timeframe could be revisited as one part of the criteria with a possible change to 12 months.

If a customer applied direct and had not selected a retailer, it was agreed that the G2 process should follow similar steps to process C2 in the customer nominating a retailer or if an opt in existed being part of an auto allocate process. This would create alignment/similar principles with other processes in the code.

Requirements:

The ability to raise G2 requests without a SPID.
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The ability to use an opt in allocation process when the customer does not have a retailer and does not make a choice.
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The ability to follow the applicable steps of C2 within the G2 process.
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*Action: OAG to further consider requirements for a SPID inline with existing guidance and eligibility rules.*

OAG to provide rational for a suggested change to the 6 month application timeframe.