

Operational Advisory Group (OAG)

12 September 2023 meeting

Minutes



Operational Advisory Group

Minutes of 12 September 2023 meeting

Attendees

OAG members and guests

- ◆ Andrew Hewett (AH)
- ◆ Charlotte Miles (CM)
- ◆ Chris Williams (CW)
- ◆ Daniel Proctor (DP)
- ◆ Heather Lamb (HL)
- ◆ Helen Bennett (HB)
- ◆ Jeremy Lunn (JL)
- ◆ Nichola Spiller (NS)
- ◆ Noel Bradley (NB)
- ◆ Onkar Singh (OS)
- ◆ Paul Baker (PB)
- ◆ Rosie Milsom-Dyer (RM)
- ◆ Sian Forward (SF)
- ◆ Suzannah Maddock (SM)

MOSL

- ◆ Chris Dawson (CD) – Chair
- ◆ Monica Falasca (MF)
- ◆ Huw Comerford (HC)
- ◆ Jacquelyn Gibson (JG)
- ◆ Sam Webb (SW)
- ◆ Lisa-Ann Lott (LAL) – notes post meeting

Meeting notes

1 Welcome

CD welcomed members and confirmed the meeting agenda. CD noted due to agenda questions should be posed either at the end of the meeting or via email.

2 Misc processes update

JG provided an updated on the miscellaneous process confirming the removal of G4 from the grouping.

JG further confirmed when raising a M1 Miscellaneous process this means G4 will not be included in the initial drop-down options. JG displayed a screenshot to demonstrate the drop-down options.

JG confirmed the miscellaneous process has now moved into development and will be delivered as per original schedule despite the changes to remove G4.

CD advised G4 OPS will be formally removed from CSD 0002.

PB enquired if misc. process can be utilised for escalations? JG confirmed not intended for that purpose and supporting text indicates should not be used to request an update or escalate an open ORID. JG noted an escalation process has not been ruled however miscellaneous process will not be used for that.

JG requested parties highlight if the misc. process if used for this once live.

CD confirmed escalations ruled out of misc. process as no method to highlight if an escalation.

JG highlighted three forms will be included as part of the misc. process to prevent the very low use processes from complicating the form in the hub and requiring extra data items. The routes which require a form are 'new supply point customer application form', 'private and cross border meter activity application form' and 'nonmarket meter read application form'. CD noted the forms will be considered by Code Advisory Group at their meeting on Friday 15 September and it will be code mandated to attach the form where appropriate as it cannot be mandated within the Hub however an error banner will be displayed if an attachment is not included on B12, B11 or A6.

3 Accredited entities

JG confirmed the accredited entity process is to be utilised to notify of completed work by an accredited entity it is not to request permission for work or to provide advance notification of works it is solely for the purpose of notifying the Wholesaler works have been completed therefore the process is for Retailers only to raise.

JG noted deferrals are only available at info requested stage as there is no requirement for a deferral at any other point.

NB enquired if it is still included code where notification can be requested beforehand and how this would be provided.

JG confirmed remains in code and advance notification can be provided via the miscellaneous process.

CD further confirmed if permission is being sought rather than simply upfront notification this will be completed outside of the Hub.

JG highlighted the lack of inclusion of requesting permission or providing upfront notification has enabled SLAs to be applied to the process. Those SLAs are 5 business days for the Retailer to advise the Wholesaler the activity has been completed and 5 business days for the Wholesaler on receipt of the submitted ORID to update CMOS. Should the Wholesaler not have all the required information at this stage deferral will be available.

JG displayed the process flow, noting it will be a SPID process.

JG noted for the B processes regarding metering these will require a form attached in a similar manner to the low volume miscellaneous processes. **JG confirmed process flows will be sent to members for ease of review.**

JG noted very similar to standard disconnections and reconnections however additional data items such as which accredited entity and if available the accredited entities work reference.

JG noted for those processes which require an attachment the error message will apply if no attachment is included in a similar manner to misc. processes.

4 Planned and unplanned

JG ran through draft screen designs noting development and build had been based on feedback received in sub-group meetings.

JG confirmed the grouping includes processes D1, D2, D3, E1, E2, E3, E4, E5, E6 and E7 highlighting E1 and E2 were originally within the misc. grouping but had been moved due to who could raise them.

JG highlighted wholesalers can raise all of the processes and retailers can only raise E2.

JG noted D3 discussed in depth in subgroup meeting and decision taken flagging of potential issues and reactive activities by retailers requires a formalised route however not via this process and will need to be made clear within code.

JG further noted the code obligation for wholesalers to provide retailers with details of operational contact with non-household customers and the considerations being made as to whether to include this functionality within the Hub, this is being considered but no decision has been reached. CD noted the misc. process could be utilised for this purpose.

JG confirmed no hub SLA for this process and therefore no deferral option as to need to stop the clock. CD highlighted there are SLAs within the codes however these are too varied to incorporate into one for the Hub.

JG highlighted retailers respond at different rates to information requests and noted this is being considered for the codes to include 'sensible endeavours or indicative timescales for response'.

JG displayed the process flow and ran through them noting only shown from a wholesaler perspective.

JG noted consideration being given to additional data item of 'event update' or 'retailer action required' for ORIDs which remain open. Wholesalers would retain control of the ORID to prevent it becoming stuck and unable to be closed.

JG confirmed whilst an ORID remains open retailers have the ability to comment or question it.

JG highlighted once an ORID is closed there is no ability to comment however the misc. process enables question/comment to be raised against a closed ORID.

JG noted event tiers have been included as a data item and links provided to the RWG good practice guides explaining the tiers, these will become code defined events in future.

JG further noted the optional ability to add a separate event or activity ID/reference.

JG highlighted it is a no-SPID process and enables attachments to be provided detailing the effecting premises. This also means wholesalers will need to choose which of their retailers the ORID should be passed to similarly for retailer raised processes they will need to select the appropriate wholesaler.

JG noted for D1 capital works a subtype of either water or sewerage works will be selectable.

JG highlighted the summary attachments offer the opportunity to highlight if any sensitive customers are affected.

JG confirmed process flows and draft screen shots will be circulated following the meeting.

JG noted the discussions held regarding providing information in a consistent format and the requests for a standard template which would remain the same regardless of which process had been selected. The only difference per process would be which items of information are mandatory. **JG confirmed Excel template to provided following the meeting. CD requested members advise if information currently supplied for any process is missing from the template.**

SF enquired if for planned works date columns exist to indicate start and end date of works. JG confirmed not included at present but could be included. SF confirmed not a mandatory requirement however optional would be useful. RM noted similar approach taken and would be useful to include as optional.

CD raised SF's query on misc. process for notifications/visits – is it expected that a wholesaler has to raise one notification with an attachment of all visits planned or unplanned or raise one per SPID, the same query for 24-hour contact. Could one notification be raised per day to satisfy the obligation? JG confirmed can raise one notification per day highlighting the caveat of ensuring only notifying the appropriate retailer. Thus, one ORID per retailer submission rather than one ORID per customer.

PB enquired if a template will be specified for those notifications as well? JG noted will be considered and added to list of potential future improvements to the Hub. CD agreed could be useful and would be created in conjunction with OAG. PB noted useful for information to be supplied in a consistent format.

CD requested members share details of the data headers supplied to retailers for the 24-hour contact reports.

5 G2

CD provided an update on G2, confirming the code documents will be published w/c 18 September for trading parties to review.

CD requested feedback be provided via MyMOSL to enable details to be tracked.

CD highlighted for G2 to prevent the ORID becoming stuck is the use of the process delay transaction which acts as a notification to the retailer indicating the process is still ongoing.

CD noted deferrals for G2 merged will be limited to three scenarios: -

- 1) When referred to a third party
- 2) Once the consent has been given
- 3) When being used for a termination or discontinuation as may require back dating.

CD highlighted, following feedback, when raising a request for termination when the customer is no longer available it will be called out that an attachment is not required, or a signature is not required because it is not achievable. This means a wholesaler can accept a request for termination without the attachment in this circumstances and this will be detailed in the code.

AH requested feedback from retailers about the use of deferrals for short term discharges when they are received in advance of the discharge starting noting rejections if the discharge is due to start more than three months after the application and requesting, they replay within the 2/3 months as it provides wholesalers 2/3 months to make the decision.

CD noted approx. 3 weeks to provide feedback on the documents prior to final recommendation by CAG and queried if another exception to deferrals should be added before final recommendation.

AH noted does not happen regularly and relates purely to short term consents and would be useful to provide a reason for deferring i.e., to provide consent closer to actual start date.

6 AOB

6.1 T224.W process delay

CD explained the T224.W transaction is used primarily in the B processes (B1, B3, B5 and B7) and has slightly different nuances dependant on what the process is used for.

CD described the current details within the code documents noting the wholesaler should be moving to complete for B1(meter install) and B7 (meter change) once the meter is installed, and all CMOS updates should be completed. T224.W should only be utilised if a further site visit is required subsequent to the initial site visit.

CD requested feedback from members to establish if T224 needs to be expanded to include other scenarios.

JG suggested providing the members with a table of scenarios where T224 is currently permitted and requesting feedback. CD to send out following the meeting.

CD confirmed additional meeting scheduled for Tuesday 3 October to discuss processes for inclusion in phase 14.

JL requested agenda provided in advance for meeting containing backlog review/prioritisation.

7 ACTIONS

NO	Action required	Action by	Action Date
11/1	Process flows and excel template to be sent to members for ease of review.	JG	18/09/2022
11/2	OAG members to advise if information currently supplied for any process is missing from the template.	All	