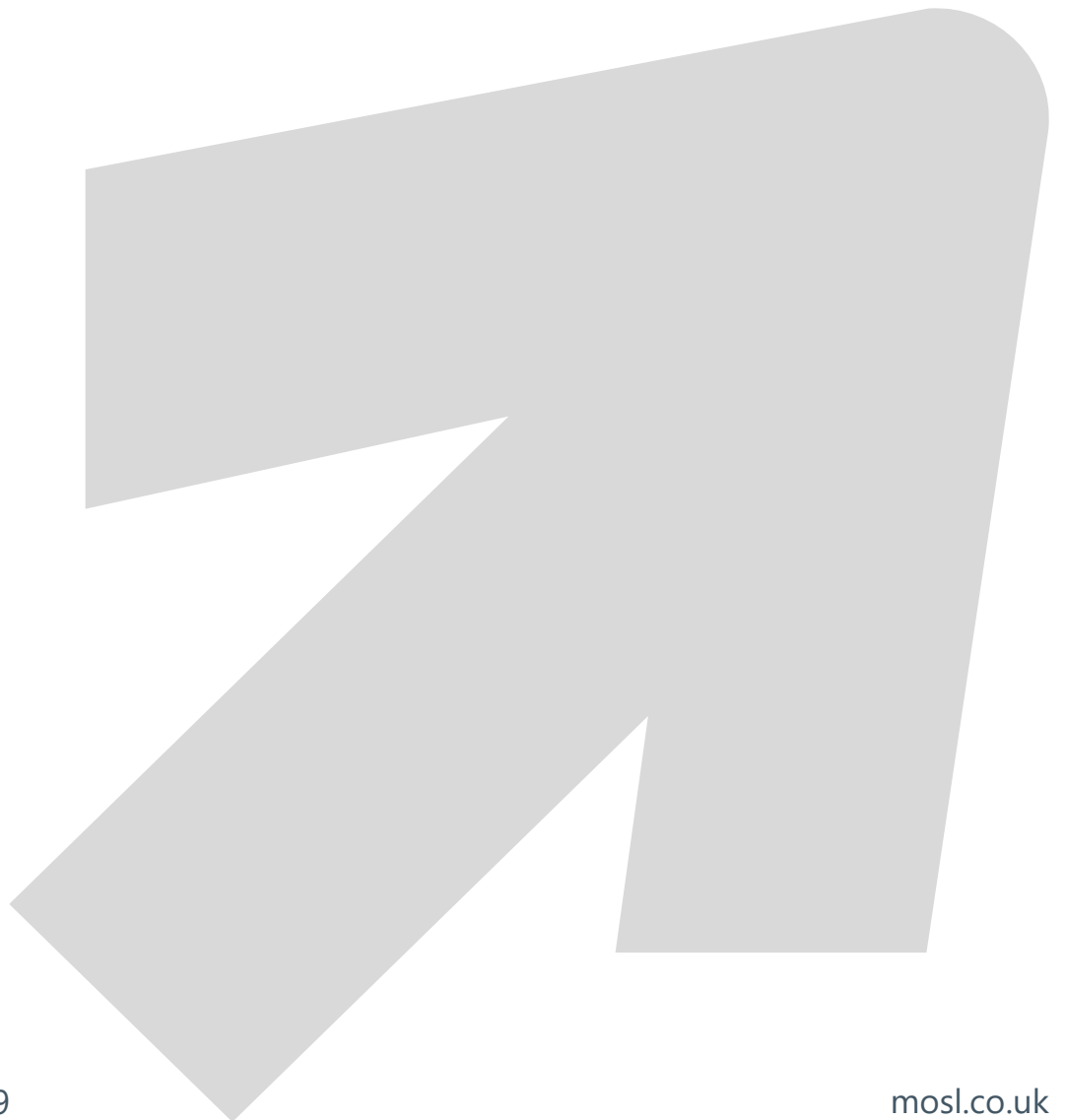


Operational Advisory Group (OAG)

Date and time: 28 January 2025, 1100 - 1230

Status of minutes: FINAL



Meeting Minutes

OAG members and guests

Name	(Initial)	Organisation	Name	(Initial)	Organisation
Chris Williams	CW	Thames	Mary Porter-Chorley	MPC	South Staffs
Daniel Proctor	DP	Waterplus	Michael Floyd	MFI	United Utilities
David Buchan	DB	Castle	Noel Bradley	NB	Yorkshire
David Moss	DM	Castle	Paul Baker	PB	Business Stream
Durga Gurung	DG	Thames	Rosemary English	RE	Southern
Karina Soulyinha	KS	Southern	Sian Forward	SF	Northumbrian
Lauren Walsh	LW	Northumbrian	Tracy Ware	TW	Portsmouth
Lisa Jewkes	LJ	Severn Trent			

MOSL

Name	(Initial)	Organisation	Name	(Initial)	Organisation
Chris Dawson	CD	Chair	Sauda Dickinson	SD	Notes
Amy English	AE	Presenter			

1.	Welcome
	CD welcomed members and gave an overview of the agenda.
2.	Advanced warning for auto-close
	<p>AE queried whether the OAG had suggestions on how the auto-close warning would be achieved – on the Hub or within an ORID, via a filter or flag?</p> <p>CD queried whether the OAG felt that the auto-close was still an issue that needs to be addressed.</p> <p>NB advised that it is an issue for customers as once a request is auto closed, the customer’s query is not address and advised that a warning would help avoid further customer impact.</p> <p>SF agreed that it is about the customer journey and noted that many issues are encountered when Retailers initiate a B5, the broken meter form gets closed as the Retailer has not responded within the time out period.</p> <p>PB agreed that it is part of the customer journey and advised that auto closes would be useful to track, and the warning would enable jeopardy management and prompt action.</p> <p>RE advised that auto close is an issue with H1s as it times out before a response is received and a warning would be helpful to know something is about to time-out, noting that in some cases trading parties recall requests to stop them from timing out and send them back again.</p> <p>AE noted a comment from NB in the chat – ‘Could advanced warning be achieved by a weekly report on forms due to auto close in the next week?’</p> <p>DM advised that there is some functionality within quick links and ‘require action’ and suggested having a pop-up for advanced warning, noting that people may not actively look at the report to track auto close items. Suggesting having a pop-up splash screen, of items that will close by the end of the day, before users move to the main dashboard.</p> <p>SF advised that the issue is individual trading party behaviour and that having another report may not fix the problem. Consideration may need to be around how to address behaviours.</p> <p>CD noted DM’s suggestion in the chat – ‘If the splash screen displayed the report with the ability to ‘download to excel’ I believe it would be more useful.’</p> <p>CD suggested the possibility of including a similar pop-up for SLAs that are about to fail.</p> <p>AE advised that a pop-up for failing SLAs could be considered but that we would want to avoid watering down the message of pop-ups by having too many.</p>

	<p>SF advised that LVI already has a button to view SLAs that are 'due today' and that a suggestion had been brought up at a previous meeting to include a date range for SLAs due.</p>
<p>3.</p>	<p>Implementation of new search fields on the Hub landing page</p>
	<p>AE noted that there currently are search fields on the landing page and queried whether additional search fields are required, if so, what search fields are needed.</p> <p>CD queried what search fields are currently available.</p> <p>OAG confirmed there are ORID and SPID search fields</p> <p>SF advised that there are many things available within in filter, but that customer name was not included in the search fields.</p> <p>MPC advised that they only search by SPID and ORID and not customer name.</p> <p>DM suggested that Wholesaler and Retailer references search fields would be useful, as well as a full post code search for gap sites and no SPID processes.</p> <p>CD queried whether it was possible to search by meter serial number.</p> <p>OAG members confirmed, in the chat, that it was possible to search by MSN.</p> <p>SF suggested having a second level search for non-SPID processes.</p> <p>CD advised that SPID processes could possibly be included in a second level search.</p>
<p>4.</p>	<p>Ability to rate Wholesaler performance</p>
	<p>AE noted that smiley faces were suggested as a way to rate performance in the Hub and queried whether it was a function the OAG felt was needed and whether it would only apply to LVI users.</p> <p>NB advised that wholesaler rating was available on the old version of Bilateral forms and provided on-the-day feedback whereas R-MeX is only every six months and wholesaler rating would be useful for training and quality moderating purposes.</p> <p>DM advised that it would be the micro version of what R-MeX does and noted that it would be a tool for teams to use as feedback on quality but that the problem statement should be made very specific to avoid misuse and that it should be for LVI, too.</p>

	<p>PB agreed that consideration needs to be taken to avoid cross-over with escalations and would need to be HVI, too.</p> <p>SF agreed that it should be for both HVI and LVI but noted that it would be open to interpretation and potential misuse.</p> <p>PN advised that it was used in SWIM Hub processes to see where processes could use improvement and was made optional to use.</p> <p>PB agreed that making it optional throughout the process would be the best approach as making it mandatory would result in negative feedback and misuse.</p> <p>PN offered to demonstrate to CD and AE how the rating function currently works in SWIM.</p> <p>AE queried whether smiley faces or a number rating would be better.</p> <p>CD advised that the use of emojis would be better as number referencing would be subjective and confusing.</p> <p>DB agreed that the numbering system would be subjective and that the use of smiley faces would be simpler.</p> <p>PB advised that the range of emojis could be increased to five to enable a rating for 'above and beyond'.</p>
<p>5.</p>	<p>SLA visibility within an ORID</p>
	<p>AE queried whether the OAG felt that the SLA name or number of days left of the SLA would be useful and what part of the SLA and which tab it would need to be displayed in.</p> <p>SF advised that it would be useful to have a view of the SLA while you are in the ORID and suggested having a view of the current SLA similar to the view of the start deferral button from an LVI view on the top of the pages.</p> <p>DM suggested including the SLA detail on the history tab.</p>
<p>6.</p>	<p>AOB</p>
	<p>SF noted concern regarding the use of GSS payment templates being made optional in the codes, noting that there was pushback from trading parties on the decision.</p>

	<p>DM advised that the template needs to be used to enable optimisation and putting the customer forward and suggested that the template should still formally be used even if other arrangements are used outside of the Hub.</p> <p>NB agreed with the suggestion to use the template in conjunction with other arrangements.</p> <p>DM advised that use of the template needs to be made part of assurance to determine and ensure the use of the template.</p> <p>CD noted MOSL would take the feedback away for consideration and advise.</p> <p>CW queried when the Phase 15 changes will be deployed to pre-production from the Bilateral Hub, particularly escalation.</p> <p>AE advised that there may be a lot delivered after the current sprint but that MOSL would confirm the exact dates offline via email.</p>
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	Actions	Action by	Action date
1.	Set-up catch-up with PN on SWIM demonstration.	AE	
2.	MOSL to confirm GSS payment template usage optionality and assurance	CD/MF	
3.	Confirm when Phase 15 changes will be deployed to pre-production	AE	