Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3213.2 – VO – PO |
| Comm Title: | Shipper Agreed Read (SAR) exceptions process (Modification 0811S) |
| Comm Date: | 14/08/2023 |

**Change Representation**

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| Action Required: | For representation |
| Close Out Date: | 29/08/2023 |

# Change Detail

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| Xoserve Reference Number:  | [XRN5604](https://www.xoserve.com/change/customer-change-register/xrn-5604-shipper-agreed-read-sar-exceptions-process-modification-0811s/) |
| Change Class: | Functional change |
| \*ChMC Constituency Impacted: | Shipper (all classes)\*Assumed impacted parties of the proposed change, all parties are encouraged to review |
| Change Owner:  | uklinkdelivery@xoserve.com |
| Background and Context: | UNC Modification 0811S Shipper Agreed Read (SAR) Exceptions Process has been raised to provide a remedy for SARs that have failed to be progressed (exceptions) within a reasonable period to be managed under a centralised process facilitated by the Central Data Services Provider (CDSP). Currently the proposing Shipper is responsible for replacing the estimated transfer read with the agreed SAR. If this fails to be accepted or unable to replace it due to incorrect history reads, then both the proposing and withdrawing Shipper should raise a Request for Adjustment (RFA) within 4 days of each other. However, some Shippers do not submit replacement reads nor raise RFAs, leading to imbalances for the other Shippers.The principle of the proposed process according to Modification 0811S, is that both Shippers should attempt to amend the transfer read in line with the SAR within 2 calendar months after it was agreed. If this has not occurred, then the CDSP can be contacted for support to reconcile both sides in line with the new agreed transfer read. To ensure this, the CDSP will not accept a request if it is submitted less than 2 months since the date of the Opening Meter Read.When the CDSP needs to be contacted for support, the Shipper should provide them with suitable evidence of the new agreed read. The CDSP will notify the non-submitting Shipper of the read and will in the absence of any relevant rejection from the non-submitting Shipper, process the read. Details of Modification 0811S can be found [here](https://www.gasgovernance.co.uk/0811)**Chosen Solution**The Contact Management Service (CMS) was chosen as the system to facilitate the new Corrective Opening Meter Reading (COMR) submission process. The key process steps being implemented are listed below:* A new ‘SAR’ contact type in CMS for either the proposing or withdrawing Shipper to submit a COMR.
* A bulk ‘SAR’ contact logging solution.
* Validation of the COMR on submission.
* Notify the non-submitting party of successful COMR submission.
* Provide mechanism for non-submitting party to reject COMR utilising one of two defined rejection reasons.
* Where no rejection is received within 20 Supply Point System Business Days (SPSBD), validate COMR again and upload into the Supply Point Register.
* Communicate result of COMR upload to the submitting and non-submitting party.
* Facilitate exception process where COMR fails to be uploaded due to system issue.
* Provide new PAC report.
* Display COMR in Gas Enquiry Service (GES) Online Portal
* Ensure the COMR is utilised in downstream processes in line with an existing SAR.

**Process Model** |

# Change Impact Assessment Dashboard

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| Functional: | Supply Point Administration (SPA). |
| Non-Functional: | None. |
| Application: | Contact Management Service (CMS), SAP IS-U |
| User(s): | Shipper (all classes), Performance Assurance Committee (PAC). |
| Documentation: | None. |
| Other: | None. |

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| Files |
| File | Parent Record | Record | Data Attribute | Hierarchy or FormatAgreed |
| .BCL | None | BCL | See Appendix for ‘BCL’ and ‘SAR’ contact definitions. | Hierarchy/format are submitted for representation in this Detailed Design Change Pack (see Appendix). |

# Change Design Description

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| **1.0 COMR Submission**A new CMS Contact Type will be used by authorised Shippers, via new logging screens, to submit a COMR on an individual basis. This new contact type will be called ‘SAR’. The submission data fields will replicate those found in the standard Shipper Agreed Read submission files for Class 2, 3 & 4 reads (UDR, UBR, UMR). An additional field will be included for the submitting Shipper to acknowledge if the reading being submitted breaches the standard outer tolerance validation.Submission fields:* Meter Point Reference Number
* Actual Read Date
* Meter Reading Source
* Meter Reading Reason
* Meter Serial Number
* Meter Reading
* Meter Round the Clock
* Convertor Serial Number
* Convertor Uncorrected Reading
* Convertor Corrected Reading
* Convertor Round the Clock
* Outer Tolerance Breach Acknowledgement

**Bulk Contact Logging (BCL)**CMS will deliver a facility to allow Customers to perform a bulk upload of ‘SAR’ contact types. This facility will be available via two routes: 1. BCL file via CMS User Interface (UI)
2. BCL file via CDSP Information Exchange (IX)

The BCL facility will allow one contact request to include many Meter Point Reference Numbers (MPRNs) for which the requestor wishes to submit COMRs for. Each successfully logged record will generate an individual CMS contact relating to single MPRN. Please see Appendix for BCL file details.**2.0 COMR Validations**Following the submission of a COMR in CMS, the read will be validated. These validations will consist of a combination of existing and new read validations.Existing read validations that will be applied to the COMR are listed in the document embedded below:New read validations that will be applied to the COMR are listed in the table below. Where the validation will be carried out in CMS, the rejection code/description is still to be determined and will be communicated by a future CMS specific Change Pack.

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| **Rejection Code** | **COMR Validations – New Read Validations**Reject if… | **New / Existing** |
| TBD | Meter Point is in Class 1 on the read date provided (includes a transfer to Class 1 on the read date) | New |
| TBD | Read date not greater than 2 months in the past | New |
| TBD | Outer tolerance breach not acknowledged | New |
| TBD | COMR submitted by the proposing Shipper and outer tolerance not breached | New |
| TBD | The meter read source is not A (Agreed Opening Read) | New |
| TBD | The meter read reason is not R (Replacement Read)  | New |
| MRE01040 | The Meter Point already has a SAR on the read date provided | New |

As per the above table, several new validations will be applied:* To ensure that a COMR isn’t submitted for a Meter Point that is in Class 1, or transfers to Class1, on the read date.
* To ensure that the COMR is submitted greater than two calendar months after the transfer read it is replacing.
* No inner tolerance validation will be applied to the COMR but where the outer tolerance has breached, the COMR submission will be rejected if it has not been acknowledged via the ‘Outer Tolerance Breach Acknowledgement’ field on submission.
* Where the COMR has been submitted by the incoming Shipper the read will be rejected if it doesn’t breach outer tolerance.
* to ensure that the correct Read Source (A) and Read Reason (R) are submitted.
* to ensure the COMR does not replace an existing SAR. This will be based on the read being replaced having a Read Source of ‘A’ and a Read Reason of ’R’. This will also prevent a COMR from replacing another COMR as per the previous validation.

Following validation, one of two outcomes will occur. The COMR submission will be accepted or rejected. These are defined below.**COMR Submission Rejected**Where the COMR submission is rejected, the contact will be closed in CMS and the submitting party notified of the relevant rejection/s.**COMR Submission Accepted**Where the submission is accepted, the contact will be directed to the non-submitting party’s work queue providing all relevant details relating to the COMR. Where the non-submitting party at the time of the Shipper transfer has changed due to a Supplier of Last Resort (SoLR) event, the COMR notification will be sent to the Shipper who replaced them.The non-submitting Shipper will have the option to reject the read by selecting one of two rejection reasons:* Corrective Opening Meter Read not agreed.
* Corrective Opening Meter Read agreed by failed Supplier (SoLR).

If no rejection is received from the non-submitting party within 20 SPSBDs then the COMR will be submitted to UK Link for upload into the Supply Point Register.**3.0 COMR Upload Process**The same set of read validations will be applied on upload as were applied as part of the initial submission. The submitting party will be notified of the result of read validation and upload via the CMS contact via CMS.**COMR Upload Rejected**Where the COMR upload is rejected, the ‘SAR’ contact will be closed in CMS and the submitting party notified of the relevant rejection/s.**COMR Upload Exception**Where an exception response is returned to CMS as part of the COMR submission, a CDSP User will investigate and resolve accordingly. The COMR would then be resubmitted for upload.**COMR Upload Accepted**Where the COMR upload is successful, the contact will be resolved in CMS and the submitting party will be notified.The COMR upload process will follow that of an existing SAR upload minimising changes to the system. As such, a standard Unbundled Read Notification (.URN) file will be issued to both the incoming and outgoing Shipper.The COMR is to be uploaded into the system following the existing SAR upload process, as a SAR so to limit the system impacts. Once uploaded, the COMR will be indistinguishable from a SAR and will therefore, be utilised in existing downstream processes, be picked up by all existing reports and be displayed in the GES Online Portal (Meter Read History tab and Read Details Results screen).**4.0 PAC Reporting**PAC reporting data will be captured by CMS. Two reports will be provided each month titled Corrective Opening Meter Read Process, one will be an industry peer comparison view and the other a Performance Assurance Committee View. The reports will be prepared 20 SPSBDs after the end of the calendar month and include the following data recorded for the previous month:* Count of Corrective Opening Meter Readings received by the Proposing Shipper where raised by the Withdrawing Shipper
* % of rejections raised against a Corrective Opening Meter Reading
* % of rejections received from the non-submitting Shipper for a Corrective Opening Meter Reading raised

**5.0 Appendix**.BCL File Record Type (covers many CMS contact types). Yellow highlighted fields pertain to changes made for XRN5604:Note - This also contains fields being added as part of XRN5605 (highlighted in green). These changes could be separated should one or the other not be accepted..BCL File Record Type fields relevant to a SAR Contact Type are listed below for clarity: |

# Associated Changes

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| Associated Change(s) and Title(s): | XRN5605 Amendments to the Must Read Process (IGT159V) through a common proposed version of the .BCL (see Appendix for further details). |

# DSG

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| Target DSG discussion date: | 21/08/2023 |
| Any further information: | To present the key points of this pack and discuss any comments as a result or already provided from the Detailed Design Change Pack representations. |

# Implementation

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| Target Release: | February 2024 |
| Status: | Approved |

Industry Response Detailed Design Review

Change Representation

(To be completed by User and returned for response)

# *Please consider any commercial impacts to your organisation that Xoserve need to be aware of when formulating your response*

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| User Contact Details: | Organisation: | ScottishPower |
| Name: | Claire Roberts |
| Email: | Clairelouise.Roberts@ScottishPower.com |
| Telephone: | 01416145930 |
| Customer decision on Change Pack: | approved |
| Representation Publication: | Publish |
| Representation Comments: | New Rejection Codes: The meter read source is not A (Agreed Opening Read) and The meter read reason is not R (Replacement Read) we are not sure they are needed as MRE00498 Meter Read Source invalid for the replacement of Opening Readings and MRE00433 The Meter Point already has an opening read for this date already exist could they not be used? Can you please confirm how the rejection reason notification will be sent, is this via CMS or flow?  |

# Xoserve’ s Response

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| Xoserve Response to Organisations Comments: | Thank you for your representation, please see the response below to your query:• MRE00433 specifically relates to an opening read but the new rejection listed, MRE01040, relates specifically to a Shipper Agreed Read, hence the need for the new rejection.• For this process, these rejections will be provided in the response from CMS following the validation and resolution of the contact submission. These will be seen in the UI when viewing the contact detail and also in the response/update files sent from CMS via the IX. There will be the ‘Contact Resolution Response (CRR)’ file which is sent daily to each organisation which will list all their contacts resolved that day. So if any SAR contacts were resolved as invalid that day, one or more of the Rejection codes listed in the change will be included for invalid resolved SAR.  |

Please send the completed representation response to uklink@xoserve.com

Change Management Committee Outcome

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| Change Status: | [x]  Approve | [ ]  Reject | [ ]  Defer |
| Industry Consultation: | [x]  10 Working Days | [ ]  15 Working Days |
| [ ]  20 Working Days | [ ]  Other [Specify Here] |
| Date Issued: | 14/08/2023 |
| Comms Ref(s): | 3213.2 – VO – PO |
| Number of Responses: | 2 |
| Solution Voting: | [x]  Shipper | Approve |
| [ ]  National Gas Transmission | Please select. |
| [ ]  Distribution Network Operator | Please select. |
| [ ]  IGT | Please select. |
| Meeting Date: | 13/09/2023 |
| Release Date: | Feb 24 |

Please send the completed representation response to uklink@xoserve.com

Version Control

# Document

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| --- | --- | --- | --- | --- |
| Version | Status | Date | Author(s) | Remarks |
| V0.1 | Draft | 26/07/2023 | Andrew Steed | Initial draft produced |
| V1.0 | For Approval | 08/08/2023 | Andrew Steed | Final draft for approval |
| V1.1 | For Approval | 09/08/2023 | Andrew Steed | Updated following review |
| V1.2 | For Approval | 10/08/2023 | Andrew Steed | Updated BCL file inserted |
| V1.3 | For Approval | 10/08/2023 | Andrew Steed | Updated Shipper classes impacted in Change Impact Assessment Dashboard section |
| V1.4 | For Approval | 10/08/2023 | Andrew Steed | Updated following review |
| V2.0 | Approved | 11/08/2023 | Andrew Steed | Document approved |

# Template

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| Version | Status | Date | Author(s) | Remarks | Approved By |
| 1.0 | Approved | 09/03/2022 | Rachel Taggart | Detail Design Change Pack transferred to own document | Change Management Committee on 09/03/2022 |
| 1.1 | Approved | 25/04/2023 | Rachel Taggart | Updated with new font branding | Emma Smith |