High Level Solution Options Change Pack

# Communication Detail

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| Comm Reference: | 3165.3 - VO - PO |
| Comm Title: | XRN5604 - Shipper Agreed Read (SAR) exceptions process (Mod 0811S) – Solution Options |
| Comm Date: | 17/04/2023 |

**Change Representation**

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| Action Required: | For Representation |
| Close Out Date: | 02/05/2023 |

# 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/) |
| \*ChMC Constituency Impacted: | Shipper – All Classes |
| Change Owner: | [uklink@xoserve.com](mailto:uklink@xoserve.com) |
| Background and Context: | Change XRN5604 has been raised to deliver the requirements of [Modification 0811S - Shipper Agreed Read (SAR) exceptions process](https://www.gasgovernance.co.uk/sites/default/files/ggf/book/2022-08/Modification%200811S%20v3.0_0.pdf). The modification is to provide a remedy for Shipper Agreed Reads (SARs) that have failed to be progressed (exceptions) within a reasonable period to be proactively managed by the Central Data Services Provider (CDSP).  Both Shippers should attempt to amend the transfer read in line with the SAR within 2 months after it was agreed. If this has not occurred, then under this change, the CDSP will be engaged for support to reconcile both sides, in line with the new agreed transfer read. When the CDSP needs to be contacted for support, the Shipper should provide them with suitable evidence of the new agreed transfer read. The CDSP will notify the non-submitting Shipper of the proposed new agreed transfer read and will, in the absence of any relevant objection, process this request accordingly.  Currently the incoming Shipper is responsible for replacing the estimated transfer read with the agreed SAR. If this fails to be accepted or is unable to be replaced due to incorrect history reads, then both parties should raise a Request for Adjustment (RFA) within 4 days of each other.  However, a Shipper may fail to submit an agreed SAR or raise the required RFAs, leading to imbalances for the corresponding Shipper involved in the site transfer. |

# Solution Options

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| Solution Option Summary: | A single solution option is being proposed to meet the requirements of the Change Proposal.  The Customer Requirements Catalogue, which the solution option seeks to meet and was presented to the Delivery Sub-Group (DSG) members on 20th March 2023, is available [here](https://www.xoserve.com/calendar/dsc-delivery-sub-group-20-march-2023/), and is attached below, as is the detailed High Level Solution Option (HLSO) overview.    **Solution Summary**  To support the referral style approach defined within the UNC Modification Business Rules, it is proposed that a new contact type be added to the Contact Management System (CMS). Within this contact, Shippers will be able to submit a Corrective Opening Meter Reading (COMR), be that the outgoing Shipper providing one where the incoming Shipper has failed to provide the SAR, or the incoming where the SAR breaches the Outer Tolerance/Market Breaker threshold. Initial validation can then be completed and, where the information provided is found to be valid the non-submitting Shipper will be issued a referral.  Initial validation:   * Supply Meter Point is Class 2, 3, or 4 * Raising Shipper is a party in the SMP transfer * The opening read has been satisfied * A Shipper Agreed Read has not already been entered into the Supply Point Register * The Shipper transfer took place greater than 2 months prior to the submission * Where submitted by the incoming Shipper, the Outer Tolerance (Market Breaker) is breached * Where the submission breaches the Outer Tolerance, the submitting Shipper has acknowledged the breach   Once the non-submitting party has been issued with the referral, they will have 20 Supply Point System Business Days within which to challenge/dispute the proposed read. It should be noted that the only valid reason for challenge, as per the UNC Modification, is that the read has not been agreed to by the non-submitting party (or, in the case of a Supplier of Last Resort event, the SoLR did not, and does not, agree with the COMR).  Where the COMR is not challenged/disputed then the CDSP will seek to update this read to the Supply Point Register. Secondary validation may be required at this point to ensure downstream processes, such as consumption volume calculations, reconciliation and AQ calculation, continuing as per existing processes. It is assumed that both the submitting and non-submitting parties will then receive the standard notification of a transfer read i.e. the Unbundled Read Notification (.URN).  **Cost and Implementation**  The proposed solution has a cost range of **£70k – £150k** and would require delivery within a standalone release. |
| Proposed Implementation Date: | CMS Release, November 2023 |
| Xoserve preferred option:  (including rationale) | Single solution option |
| DSG preferred solution option:  (including rationale) | Impacted parties are encouraged to attend the Delivery Sub-Group (DSG) on 24th April 2023, where this Solution Change Pack will be presented for discussion.  For more information on April DSG please visit Xoserve.com [here](https://www.xoserve.com/calendar/dsc-delivery-sub-group-24-april-2023/) where the session documentation will be added.  If you would like to be added to the DSG invite list, please contact us at [uklink@xoserve.com](mailto:uklink@xoserve.com) |

# Service Lines and Funding

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| Service Line(s) Impacted - New or existing | New service line expected to be added to Service Area 1 |
| Level of Impact | Minor |
| Impacts on UK Link Manual/ Data Permissions Matrix | None |

Industry Response Solution Options Review

# Organisation’s preferred solution option

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| User Contact Details: | Organisation: | SEFE Energy |
| Name: | Lisa Saycell |
| Email: | lisa.saycell@sefe-energy.com |
| Telephone: | 07860408770 |
| Organisation’s preferred solution option, including rationale taking into account costs, risks, resource etc. | Please can you advise through what mechanism a non-submitting shipper will be notified of a replacement read? It is possible that shippers will submit all there historical reads at go live, which could go back to LIS and create scenarios where the non-submitting shipper is unable to validate the data within the 20 working day timescales. What mitigation can be implemented to prevent this scenario?   Also confirmed target release date, however non provided in the change pack.  Deferred DSG solution as | |
| Implementation Date: | approved | |
| Xoserve preferred solution option: | approved | |
| DSG preferred solution option: | approved | |
| Publication of consultation response: | N/A | |

# Xoserve’ s Response

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| Xoserve Response to Organisations Comments: | Thank you for your representation.  The method of notification has not been defined at this point however is expected to utilise existing [new] CMS capabilities which currently requires Users to monitor contacts by logging in to the system. There is potential for the contact notification functionality within [new] CMS to expand in future however the details of this, and timeline, are not currently defined.  As part of the design and implementation activities for this change we can seek to further understand the likely uptake of the process and how customers could be best supported in managing any initial surge, both in the submission and review processes. For clarity, there is no allowance in the modification to amend the 20day window should volumes be greater than expected.  As per the modification, this process has been developed as an exception process and, as per the ROM, this suggests that volumes are not expected to be significant.  Target release date – This is proposed in the pack as the CMS Release, November 2023. |

Change Management Committee Outcome

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| Change Status: | Approve | Reject | | | Defer |
| Approved Solution Option | Option 1 (only option) | | | | |
| Funding Split agreed | 100% Shipper | | | | |
| Industry Consultation: | 10 Working Days | | 15 Working Days | | |
| 20 Working Days | | Other [Specify Here] | | |
| Date Issued: | 17/04/2023 | | | | |
| Comms Ref(s): | 3165.3 - VO - PO | | | | |
| Number of Responses: | 1 | | | | |
| Solution Voting: | Shipper | | | Please select. | |
| National Grid Transmission | | | Please select. | |
| Distribution Network Operator | | | Please select. | |
| IGT | | | Please select. | |
| Meeting Date: | 10/05/2023 | | | | |
| Proposed Release Date: | Release: Major/Adhoc | | | | |

**Version Control**

**Document**

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| Version | Status | Date | Author(s) | Remarks |
| V1 | Approved | 12/05/2023 | Kate Lancaster | May ChMC approved Solution Option 1  May ChMC approved finding split 100% Shipper |