Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3213.3 - VO - PO |
| Comm Title: | XRN5605 – Amendments to the must read process (IGT159V) – Detailed Design Change Pack |
| 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:  | [XRN5605](https://www.xoserve.com/change/customer-change-register/xrn-5605-amendments-to-the-must-read-process-igt159v/) |
| Change Class: | Functional change.  |
| \*ChMC Constituency Impacted: | Shipper, All ClassesIndependent Gas Transporters (IGT)\*Assumed impacted parties of the proposed change, all parties are encouraged to review |
| Change Owner:  | uklinkdelivery@xoserve.com |
| Background and Context: | IGT Modification 159 – Amendments to the must read process have been raised to update the IGT must read process to ensure it is fit for purpose. This includes making the following changes: 1. Placing a timeframe on the must read being provided by the IGT to ensure the timeframe aligns with the current validation window.
2. Allowing Shippers and the Meter Reading Agent (which is the IGT) a mechanism to exclude Supply Meter Points (SMPs) from the IGT must read process which have a known meter issue preventing reads being obtained.
3. Excluding Smart, Automated Meter Reading (AMR) and Data Communications Company (DCC) Active SMPs from being included in the IGT must read process.
4. Where there is a Supplier of Last Resort (SoLR) or Change Of Shipper (CoS) event, allow a 4 month pause in the relevant SMP(s) entering the IGT must read process.
5. Ensuring Performance Assurance Committee (PAC) are provided the relevant information about the IGT must read process.

Details of the Change Proposal can be found [here](https://www.xoserve.com/media/oxod1agf/xrn5605-amendments-to-the-must-read-process-igt-mod-159v.pdf)Details of the history of the IGT 159V modification can be found [here](https://www.igt-unc.co.uk/igt159-amendments-to-the-must-read-process/)Details of the final IGT 159V modification report can be found [here](https://www.igt-unc.co.uk/wp-content/uploads/2022/10/IGT159V-Final-Modification-Report-v1.0.pdf)Details of the High Level Solution Options (HLSO) can be found [here](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.xoserve.com%2Fmedia%2Fgbqcaesj%2Fhlso-xrn5605-amendments-to-the-must-read-process-igt159v-v13-clean.docx&wdOrigin=BROWSELINK)HLSO **option 1b** was chosen at the Extraordinary Change Management Committee of the 16th of June 2023.**Summary of HLSO option 1b****XRN5605 uses Contact Management Service (CMS), UK Link and Data Discovery platform (DDP).** Under this option, it is proposed that Shipper Users and IGTs will log changes to the ‘known meter issue’ flag via a new contact code within [new] CMS. This can be done for single SMPs through the CMS user interface. A bulk upload option via Bulk Contact Logging (BCL) through a CMS user interface (UI) file, or via the CDSP information exchange (IX) file route, are both planned to be made available by CMS in 2023. The flag settings will be passed through the CDSP estate to support the must read Pre-Notification and Notification reporting, with DDP providing notification of flag sets/unsets at SMP level, on a Customer self-service basis.UKLink will be amended to perform the additional business rules (e.g., Business rule 2.a – exclude SMPs with a known meter issue flag from entering the IGT must read process), as required by modification IGT159V. Additionally, existing Shipper must read dashboard views on DDP will be amended to reflect the new business rules in IGT159V.  |

# Change Impact Assessment Dashboard

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| Functional: | Supply Point Administration (SPA). |
| Non-Functional: | None. |
| Application: | Contact Management Service (CMS), UK Link, Data Discovery Platform (DDP). |
| User(s): | Shipper (All Classes), Independent Gas Transporters (IGT), 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’ record data attribute definitions. | Hierarchy/format are submitted for representation in this Detailed Design Change Pack (see Appendix). |

# Change Design Description

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| **Introduction**A new contact code will be made available in CMS for authorised users to request the setting/unsetting of a known meter issue flag, for a Meter Point Reference Number (MPRN) that is part of an IGT network. On successful validation that the MPRN qualifies for this set/unset request, the request will be actioned within UK Link. The monthly IGT must read process will be amended to use the new business rules described in modification IGT159V, with the monthly must read Notification Report only showing MPRNs that qualify to be shown according to the new business rules. Shipper and IGT authorised users will be able to use DDP to obtain reports of MPRNs for which the known meter issue flag is set, provided that the MPRN is relevant to the Shipper or IGT. **Contact Management Service (CMS)**1. A new contact code ‘KMI’ (“Known Meter Issue”) will be used by authorised Shipper and IGT users, via new logging screens, to request a known meter issue flag to be set/unset against a qualifying MPRN, where qualifying means:
	1. Is in the raising Requestor’s ownership.
	2. Is of a status for inclusion in a must read process (i.e., exists in UK Link, is not Dead/Extinct, etc.)
2. Contacts can be logged on an individual MPRN basis by a user via a Logging Form in the User Interface or via the Bulk Contact Logging (BCL) file (see Appendix for file specification).
	1. CMS will deliver a facility to allow Customers to perform a bulk upload of ‘KMI’ 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)
	2. The BCL submission contains multiple records, each successfully logged record generates a CMS Contact (e.g., CRN30004567), and each row/contact has one MPRN related to it.
3. CMS will update the contact with new resolution messages to show whether the request was completed successfully by UK Link or not.
4. If CMS detects that an open must read contact already exists for the MPRN, at the point at which a user sets/unsets a known meter issue flag, then the open must read contact will be updated by CMS to show that a known meter issue flag has been set (or unset). Note that the must read contact is not resolved or automatically closed at this point. A must read contact is resolved when a Valid Meter Reading is provided to UK Link.
5. CMS will allow an authorised user to download an up-to-date list of MPRNs that have entered the IGT must read process (i.e., they are inflight), including those which have a known meter issue flag set.
6. **Note** – the flag setting/unsetting facility in CMS sits outside of the monthly IGT must read process. This means that any qualifying MPRN can have the flag set/unset, regardless of whether the MPRN is currently in the IGT must read process or not.
7. **Note** – UK Link will retain records of all IGT MPRNs that have had a known meter issue flag set against it. For IGT MPRNs that have had the flag unset, these records will be retained for a period of 12 calendar months after the date of reset.
8. **No exclusivity of update.** Either party, be they IGT or Shipper, will both be able to set/unset the known meter issue flag against a given (qualifying) SMP.

**Monthly IGT must read process**1. The existing ‘Pre-Notifications’ report will continue to be made available to Shippers on the 2nd business day of the month:
	1. The format / layout of the report will not be amended.
	2. Although IGT159V seeks to amend the must read process to exclude the following types of SMPs from entering the must read process, they will appear (i.e., will not be excluded) on the Pre-Notifications report (which **is not the start** of the must read process):

\* a Smart meter associated\* an AMR Indicator\* an active DCC flag\* an active known meter issue flag\* had a qualifying Change of Shipper (CoS) event (including from a SoLR event), during the previous 80 Supply Point System Business Days (SPSBDs) \* had a qualifying Change of Supplier (CoSup) event, during the previous 80 SPSBDs1. The existing ‘Notifications’ report will continue to be made available to Shippers and IGTs on the 20th business day of the month
	1. The format / layout of the report will not be amended.
	2. IGT159V will amend the report to exclude (or pause) the following types of SMPs from entering the must read process, and they will not appear on the Notifications report (which **is the start** of the must read process):

\* a Smart meter associated\* an AMR Indicator\* an active DCC flag\* an active known meter issue flag\* had a qualifying Change of Shipper (CoS) event (including from a SoLR event), during the previous 80 Supply Point System Business Days (SPSBDs) \* had a qualifying Change of Supplier (CoSup) event, during the previous 80 SPSBDs1. The IGT provides must reads to the CDSP, within the standard validation window of 25 SPSBDs after the read was obtained. If, after the IGT uploads a read and it is validated by the CDSP to be outside of the 25 SPSBD window, then the CDSP will reject the read – together with an appropriate rejection reason.
2. ***Inflight must reads***

Other than CMS updating an open must read contact with a known meter issue flag set/unset, SMPs that will be inflight in the IGT must read process, at the point of XRN5605 Go-Live, **will not be subjected to** the business rules of IGT159V. * 1. *Example #1: An IGT SMP has an open contact for the IGT to obtain a meter reading. XRN5605 goes live. A known meter issue flag is set against the SMP. CMS updates the open contact to show it has a known meter issue.*
	2. *Example #2: An IGT SMP has an open contact for the IGT to obtain a meter reading. XRN5605 goes live. The SMP has either a Smart meter associated, or an AMR indicator, or an active DCC flag.*
	3. *Example #3: An IGT SMP has an open contact for the IGT to obtain a meter reading. XRN5605 goes live. The SMP has undergone either a CoS, a CoSup or a SoLR event during the previous 80 SPSBDs.*

*SMPs that are* ***inflight*** *in the IGT must read process at the point of XRN5605 Go-Live,* ***shall continue to have an open must read contact, which may be closed after the IGT submits a Valid Meter Reading (VMR) to UK Link.*** *For the avoidance of doubt, the new IGT159V business rules will not pause/exclude SMPs – or automatically close must read contacts for SMPs – that are already inflight in the IGT must read process.* 1. **Note** - Currently the legal appointment date of a SoLR is not recorded within central systems and all central updates are managed through the standard registration processes. As such the solutions propose utilising the gaining Shipper registration date to drive a pause in the must read requirement.

**Data Discovery Platform (DDP)**1. **DDP Consequential changes caused by XRN5605/IGT159V.**
	1. Must read Notification dashboard.
		1. Will be changed to reflect the pausing of SMPs from the IGT must read process, as per the new business rules provided by IGT159V.
2. **PARR reporting.**
	1. New reports will be created for the PAC. As IGT159V sets out an intent for reporting, rather than actual report designs, CDSP will work in cooperation with the PAC to agree the final report designs.
	2. Initial work with the PAC has provides an early (but not completed) view of what the report designs may show (see attachment below):

* 1. CDSP will create/amend security privileges in order for PAC to access the new PARR reports.
1. **View of SMPs having a known meter issue.**
	1. Authorised Shipper/IGT users of DDP will see the following new / amended features:
		1. Shipper users will be able to identify, via a self-serve feature, where an IGT notified the CDSP of a known meter issue.
		2. IGT users will be able to identify via, a self-serve feature, where a Shipper notified the CDSP of a known meter issue.

**Note** – The setting/unsetting of the known meter issue flag will be available to Shippers/IGTs on non-business says (e.g., Weekends, Bank Holidays, etc.), subject to any CDSP planned system outages. **Note** – The CDSP has not countenanced a data preparation phase for Customers, such that Shippers/IGTs will be able to pre-prepare and pre-load UK Link (via CMS) with SMPs with known meter issue flags, ahead of a Go-Live date. **Principle of lag.** A flag set/unset request (made on CMS) will be processed and completed (by UK Link) by the end of the same calendar day (the function operates on business, and non-business, days). The non-submitting party to that request will be able to obtain notification of it, from DDP, two calendar days after UK Link successfully completes the flag update: * *Example #1: Flag set/unset request made on CMS on Saturday.*
	+ *Non-submitting party can obtain notification on the following Monday.*
* *Example #2: Flag set/unset request made on CMS on Sunday.*
	+ *Non-submitting party can obtain notification on the following Tuesday.*
* *Example #3: Flag set/unset request made on CMS on Monday (a business day).*
	+ *Non-submitting party can obtain notification on the following Wednesday.*
* *Example #4: Flag set/unset request made on CMS on Tuesday (a business day).*
	+ *Non-submitting party can obtain notification on the following Thursday.*

The monthly Notification Report (produced on the 20th business day by UK Link for industry action) will react to flag settings made on CMS up to and including the previous business day. Should Customers wish to exclude a given SMP from the IGT must read process due to a known meter issue (i.e., for the SMP not to show on the Notification Report from UK Link on the 20th business day of a month and create a Must Read (MUR) contact in CMS), then the Customer must request the flag set/unset by 5pm at the end of the 19th business day of a month. **Effect of known meter issue flag on Pre-Notification / Notification Reports (where SMP qualifies to enter the must read process and there is no inflight contact):** * **Flag is set on CMS between 1st and 19th Business Day of the month.**
* SMP is shown on the Pre-Notification report on the 2nd
* SMP is not shown on Notification report generated on the 20th
* **Flag is set on CMS between 20th Business Day of the month and the 19th Business Day of the next month.**
	+ SMP is shown on next Pre-Notification report on the 2nd
	+ SMP not shown on the next Notification report generated on the 20th

**Known Meter Issue (KMI) flag setting is later followed by a Change of Shipper (CoS).** Where a KMI flag is set against an MPRN which is associated to a given Shipper A, but later the MPRN undergoes a CoS such that the MPRN is associated to a new Shipper B, then DDP will be able to recognise that the current registered Shipper for the MPRN (Shipper B) is different to the Shipper that originally requested the KMI flag to be set (Shipper A) – and DDP will be able to provide the correct (self-service) time period specific views of when the flagged MPRN **was with** Shipper A, and **is with** Shipper B. **Users and roles*** + A new CMS Contact Type (Known Meter Issue - ‘KMI’) will be created, and the existing CMS authorisation/permissions framework will be used to allow the appropriate CMS Users to create/update it.
	+ DDP will use its existing authorisation/permissions framework to allow the appropriate Users to access the new PARR reports, and meter issue notifications.

**APPENDIX****.BCL Record Type Format (covers many other CMS contact types as well as ‘KMI’ ). Green highlighted fields pertain to changes made for XRN5605:**Please note that yellow highlighting pertains to change XRN5604 (five-six-zero-four) and are not to be read in conjunction with this change XRN5605 (fix-six-zero-five). **KMI Contact Type (a subset of BCL Record Type fields):**The following list shows which fields within a BCL record are to be used when raising a KMI contact. Please note that the full BCL record structure, as defined, will be required.  |

# Associated Changes

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| Associated Change(s) and Title(s): | 1. A scheduled DDP release in line with XRN5605 (as yet untitled).
2. XRN5604 - UNC Modification 0811S Shipper Agreed Read (SAR) Exceptions Process
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# 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

«RangeStart:HDS»

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: | «h1\_organisation» |
| Name: | «h1\_name» |
| Email: | «h1\_email» |
| Telephone: | «h1\_telephone» |
| Customer decision on Change Pack: | «h1\_userDataStatus» |
| Representation Publication: | «h1\_consultation» |
| Representation Comments: | «h1\_userDataComments» |

# Xoserve’ s Response

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| Xoserve Response to Organisations Comments: | «h1\_xoserveResponse» |

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

«RangeEnd:HDS»

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): | 3213.3 - VO - PO |
| Number of Responses: | 0 |
| Solution Voting: | [x]  Shipper | Approve |
| [ ]  National Gas Transmission | Please select. |
| [ ]  Distribution Network Operator | Please select. |
| [x]  IGT | Approve |
| 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 |
| V1.2A | Approved | 11.08.2023 | Rajiv Patel | Further updates to V1.1FA after further Xoserve formal review. |

# 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 |