Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3015.2 – RT - PO |
| Comm Title: | XRN4990 - Transfer of Sites with Low Valid Meter Reading Submission Performance from Classes 2 and 3 into Class 4. |
| Comm Date: | 19/04/2022 |

**Change Representation**

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| Action Required: | For representation. |
| Close Out Date: | 04/05/2022 |

# Change Detail

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| Xoserve Reference Number: | XRN4990 |
| Change Class: | CDSP Functional System, CDSP Reporting to Shipper Users. |
| \*ChMC Constituency Impacted: | Shipper, all Classes. |
| Change Owner: | James Barlow  [james.barlow@xoserve.com](mailto:james.barlow@xoserve.com) |
| Background and Context: | Post Nexus delivery Unidentified Gas (UIG) is shared out using weighting factors determined by the Allocation of Unidentified Gas Expert (AUGE), and currently less UIG is apportioned to Class 2 and Class 3 Supply Points than to Class 4 Supply Points.  At present, while Valid Meter Reading submission performance targets are clearly laid out in the UNC TPD Section M, there is no further incentive to ensure Valid Meter Reading performance reaches a suitable level and is maintained. As it stands, without additional incentives, Shippers can move large numbers of sites (with potentially high associated energy consumption) into Classes 2 and 3 and, therefore, reduce their UIG exposure.  The Performance Assurance Committee (PAC) has been monitoring the situation over recent months, and it has become clear that poor performance can continue with no incentive (beyond Uniform Network Code (UNC) breach) to rectify the situation in the short term.  For this reason, the PAC is seeking to create additional incentives in this area to ensure Shippers reach and maintain a minimum level of Valid Meter Readings that are submitted to the CDSP for both Classes 2 and 3 as established in the UNC. |

# Change Impact Assessment Dashboard

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| Functional: | Supply Point Administration (SPA) |
| Non-Functional: | None |
| Application: | SAP-ISU |
| User(s): | Shipper, all Classes. |
| Documentation: | None |
| Other: | None |

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| --- | --- | --- | --- | --- |
| Files | | | | |
| File | Parent Record | Record | Data Attribute | Hierarchy or Format  Agreed |
| None | None | None | None | None |

# Change Design Description

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| **Introduction.**  Further to the PAC seeking to create additional incentives to ensure Shippers reach and maintain a minimum level of Valid Meter Readings that are submitted to the CDSP, the solution will be to create an obligation (via [MOD0664](https://www.gasgovernance.co.uk/0664)) for Shippers to transfer those Supply Points in Classes 2 and 3 where the percentage of Valid Meter Readings obtained from the Supply Meters is below the minimum required standard into Class 4 for each Shipper and Supplier combination. Valid Reading submission performance will be measured at Supply Point level.  Those Supply Points falling below a specified benchmark for a consecutive period will be reported to the Shipper. After an allowed period, where a Shipper does not move Supply Points that have fallen below the threshold in accordance with the obligation, the CDSP will automatically move those Supply Points into Class 4.  **Supply Point read benchmarks.**   1. Aggregate Valid Meter Reading Requirement: per Shipper, per Supply Point Class, that [90%] or more of Supply Points have had a daily Valid Meter Reading for [25%] or more of the days in each month of a Performance Period (a period of [3] full calendar months). 2. Supplier Valid Meter Reading Requirement: per associated Supplier of the Shipper, per Supply Point Class, that [90%] or more of Supply Points in that Class have had a daily Valid Meter Reading for [25%] or more of the days in each month of a Performance Period. 3. Individual Valid Meter Reading Requirement: (a) Where D is the Supply Point read date, each relevant Class 2 Supply Point has a daily Valid Meter Reading, submitted by the end of D+1, for [25%] or more of the calendar days of each month in a Performance period. Reads outside of D+1 shall be regarded as a failure; (b) Each relevant Class 3 Supply Point has a daily Valid Meter Reading of [25%] or more of the calendar days of each month in a Performance Period.   Where a Shipper portfolio meets the Minimum Performance Measure then no Supply Meters will need to be reclassified irrespective of the performance of any Shipper and Supplier combinations under that Shipper. The performance of each Shipper and Supplier combination are only considered when the Shipper portfolio in aggregate across all suppliers does not meet the Minimum Performance Measure.  Please note, performance measures are per Class however will initially be the same. These measures, plus the Performance Period, will then be subject to annual review by the PAC. As per the modification, the outcome of this review will be notified to Shippers no later than 31st August and will take effect from the start of the following Gas Year. Where the values are changed then the lower target will apply for all Performance Periods that include months with differing values. The same will apply in the scenario where Class 2 and 3 performance measures are different and a Supply Point changes between them.  **Time of first operation.**  The first Performance Period (a period of 3 full calendar months) will start on the first day of the calendar month following implementation of Code Modification 0664. For the avoidance of doubt, if the implementation date is the 1st of a calendar month then the first Performance Period start will align to this.  **Notification from CDSP to Shipper of Failed Supply Point.**  By no later than the 20th calendar day of the month, the CDSP will notify Shippers of Failed Supply Points via new reports/views on the existing Data Discovery Platform (DDP) Shipper dashboard. The reporting is expected to show performance evaluation at the level of (i) Shipper, (ii) Supplier(s) of Shipper, (iii) Supply Point.  These DDP dashboard reports/views will be designed and developed iteratively by a DDP reporting team in conjunction with a Shipper forum. Further details and screenshots of these reports will be published in an addendum to this Change Pack at the earliest opportunity.  **Shipper action upon notification of Failed Supply Point.**  Shippers will be obliged to change the Class of Failed Supply Points to Class 4 at the earliest opportunity but, in any event, the transfers must be effective within 20 calendar days of notification from the CDSP.  The change of Class will be achieved via the existing means of submitting a C38 record on the Supply Point Changes .SPC File to the CDSP. To be clear, XRN4990 will not change the existing Shipper process for reclassifying a Supply Point.  Should the total volume of Failed Supply Points across the entire Shipper community potentially result in the daily maximum load for Supply Point changes being exceeded (from a UK-LINK system performance perspective – as specified in the UKLBD2 UK Link IS Service v13L), then the CDSP will work with the affected Shippers to timetable their .SCR submissions over a period of time to operationally smooth the load on the UK-LINK system.  **CDSP action after the 20 calendar day grace period.**  During the very first Performance Period (a period of 3 full calendar months), whilst the CDSP will measure and report performance to Shippers, no reclassifications will be required by the Shipper or CDSP in this period as Supply Points cannot be deemed to be Failed Supply Points until the end of this initial period.  After the very first Performance Period has fully elapsed, if the identified Failed Supply Points have not become effective into Class 4 within 20 days of receipt of the notification by Shippers, the CDSP will reclassify such Supply Points to Class 4 on the Shipper’s behalf, and as soon as is practical. After the very first Performance Period has fully elapsed, this will become a monthly process. The CDSP will not necessarily have Supply Points to reclassify every month.  When reclassifying Supply Points on behalf of the Shipper the CDSP will set the Meter Read Frequency (MRF) as per the rules stated in UNC Section M, paragraph 5.9.1 (automatic update to MRF introduced by [Mod0692](https://www.gasgovernance.co.uk/index.php/0692) and implemented under [XRN4941](https://www.xoserve.com/change/change-proposals/xrn-4941-auto-updates-to-meter-read-frequency-mod0692/) as part of the Nov-21 major release).  The CDSP shall notify Shippers of such reclassifications by sending an unsolicited X09 record within a .SCR File, per Supply Point, to the Shipper. Note that the UNC prevents the Supply Point from being reclassified again for a period of 2 months.  **Charge for CDSP reclassification.**  Under this modification the CDSP will be entitled to charge Shippers, on a Supply Point basis, for all Supply Points that it reclassifies from Classes 2 and 3 to Class 4 on behalf of Shippers in each calendar month. Should the CDSP seek to invoke this option it will be communicated to parties in advance and it will be based on whether an unsolicited X09 record was sent to the Shipper within a .SCR File. A new Specific Service charge will be created to cover this new service and added to the Shipper’s Specific Service invoice.  **In-flight (pending) Class Changes at Point of CDSP Reclassification.**  At the , two options for handing pending (Shipper-led) Class Change, at the point of CDSP evaluation for reclassifying on the Shipper’s behalf were aired. The meeting concluded that Option 1 (below) was to be proceeded with.  Should a pending Class Change be present with an effective date later than the 20th calendar day subsequent to notification, the CDSP will take the following action:   1. If the pending Class Change is to Class 2 or to Class 3 then the CDSP will cancel the pending change and action the reclassification to Class 4. 2. If the pending class change is to Class 4 then the CDSP will cancel this and action the reclassification to Class 4 on the Shipper’s behalf **IF** this action will result in the change to Class 4 being effective sooner.   Conversely, a Shipper-led Class change will be allowed to proceed **IF** this action will result in the change to Class 4 being effective sooner than a CDSP-led Class change.  **Expected typical timeline.**   1. On a monthly basis, by no later than the 20th calendar day of the month, reports of Failed Supply Points will be available on the Shipper dashboard. 2. Shippers will then be granted a further 20 calendar days in which to reclassify Failed Supply Points. 3. Thereafter, as soon as is practical following those further 20 calendar days, the CDSP will again evaluate the Failed Supply Point. Where the CDSP evaluates that the Failed Supply Point has not been reclassified to Class 4, then the CDSP will reclassify the Supply Point to Class 4 on the Shipper’s behalf. 4. The CDSP will notify the Shipper of the reclassification via an unsolicited X09 record within the .SCR File, per Supply Point 5. The CDSP-led Class change, from initial triggering to successful completion of transfer to Class 4, will take 5 business days to become effective in the system.   **Illustration of events after go-live.**   1. In this illustration, the change goes live in November. 2. Performance measurement starts in December. 3. The first Performance Period is the 3 months from December to February. 4. The Digital Data Platform Shipper Dashboard shows, starting in December, on a monthly basis, which Supply Points are not performing. 5. CDSP reclassifications are not required until a full 3 month Performance Period has elapsed. CDSP reclassification commence from April onwards. 6. Thereafter, the overall process becomes monthly. With read performance being evaluated over a historic rolling 3-month Performance Period. 7. Reclassification charges by the CDSP, should they be invoked, will be issued to Shippers following CDSP reclassifications. Any queries on the reclassification charges should be raised to Xoserve through standard channels (e.g. via nominated Customer Advocate or Service Desk).   **Reference material.**   1. E-learning materials - [E-learning materials (xoserve.com)](https://www.xoserve.com/learning-hub/training-and-e-learning/e-learning-materials/) 2. Meter Reads - [Meter Reads - Overview | Rise 360 (articulate.com)](https://rise.articulate.com/share/lfKfB7HHh4YsFu-pAzdaCfOJ0FsE3QKQ) |

Associated Changes

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| Associated Change(s) and Title(s): | None. |

# DSG

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| Target DSG discussion date: | 25/04/2022 |
| Any further information: | To discuss any comments provided from the Detailed Design Change Pack representations. |

# Implementation

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| Target Release: |  |
| Status: |  |

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: | EDF | |
| Name: | Eleanor Laurence | |
| Email: | eleanor.laurence@edfenergy.com | |
| Telephone: | 07791801720 | |
| Representation Status: | Approve with comments | | |
| Representation Publication: | Publish | | |
| Representation Comments: | In the supply point read benchmarks - if one is not hit for example aggregate is not met but individual is met, would all of the MPRNs in the aggregate be moved class irrespective of individual MPRNs hitting their target measures? Could we have some further clarification on the benchmarks please? | | |
| Confirm Target Release Date? | Yes | | «h1\_userDataAlternative» |

# Xoserve’ s Response

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| Xoserve Response to Organisations Comments: | Thank you for the question. The CDSP will evaluate the benchmark rules at Aggregate level, at Supplier level and at Individual Supply Meter Point level. Only if, at the overall Aggregate level, the CDSP evaluates that the Shipper is not meeting the Valid Meter Reading obligation, will the CDSP then seek to go down to Supply Meter Point level to report which individual Failing Class 2/Class 3 Supply Meter Points should be reclassified to Class 4 by the Shipper. If the Shipper does not reclassify within a set timeframe, then the CDSP will only reclassify the Failing Supply Meter Points. In this scheme, if at the overall Aggregate level a Shipper passes the aggregate benchmark, there is no obligation for the Shipper or the CDSP to arrange to reclassify any Supply Meter Points even if they are evaluated to be Failing Supply Meter Points.   Specifically on the question: “In the supply point read benchmarks - if one is not hit for example aggregate is not met but individual is met, would all of the MPRNs in the aggregate be moved class irrespective of individual MPRNs hitting their target measures? Could we have some further clarification on the benchmarks please?” – if the aggregate benchmark is not met, but the individual Supply Meter Points benchmark is met, then the Shipper is obliged to reclassify any Failing Supply Meter Points notified to them by the CDSP. Note that only Failing Supply Meter Points (i.e. those notified to the Shipper by the CDSP) should be reclassified. Supply Meter Points hitting their target measures will not be notified by the CDSP to the Shipper for reclassification. |

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: | Centrica | |
| Name: | Oorlagh Chapman | |
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| Telephone: | 07557614769 | |
| Representation Status: | Clarification Questions for process and charges | | |
| Representation Publication: | Publish | | |
| Representation Comments: | Please clarify, does a site need to be Class 2 or 3 for a full calendar month before being considered for performance? For example, Supply Point is class changed to Class 3 mid January, the first 3 months of performance to be considered will be February, March, April?  It also states that the CDSP will halt Class change activity to Class 2 or 3 after the 20th business day. Please confirm, if a Supply Point has to be effective for a full month to be considered in performance (as with other DDP reporting, has to be a full month to be considered for performance)   Class 2 sites have D+5 days to submit actuals read. However, in this modification Class 2 sites have a failure after D+1, This is not acceptable as it will impact sites with intermittent comms that submit actual reads within the UNC specified D+5.  The lack of transparency for service cost for the CDSP to move sites is not acceptable. There is no indication on price; Please confirm the difference in approach. Please confirm why we should not move them using DDP reports for other admin charges, like changing monthly read frequency as per MOD 0692 | | |
| Confirm Target Release Date? | Yes | | «h1\_userDataAlternative» |

# Xoserve’ s Response

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| Xoserve Response to Organisations Comments: | Where a Supply Point undergoes a Class change after the first day of a month, it is only considered for performance against the Performance Period from the start of the subsequent month. In the example, the first 3 months of performance to be considered will be February, March and April.   If this is the section of the Change Pack being referred to:  “In-flight (pending) Class Changes at Point of CDSP Reclassification. Should a pending Class Change be present with an effective date later than the 20th calendar day subsequent to notification, the CDSP will take the following action: (a)If the pending Class Change is to Class 2 or to Class 3 then the CDSP will cancel the pending change and action the reclassification to Class 4.” After the 20th day, the CDSP will not halt Class Change activity. The CDSP will check for in-flight (pending) Class changes for the Failed Supply Point in question. If a Class Change is found, but it is to Class 2 or Class 3 and not to Class 4, then the CDSP will cancel the in-flight Class Change and, instead, reclassify to Class 4 – in line with MOD 0664.   Please confirm, if a Supply Point has to be effective for a full month to be considered in performance (as with other DDP reporting, has to be a full month to be considered for performance) Correct. From MOD 0664 “… The Supply Meter must be classified as either Class 2 or 3 for the entire calendar month to be considered for a Performance Month within the Performance Period.”  The read performance measure is as per UNC, i.e. for performance the read must be submitted by D+1. Valid reads can be submitted up to D+5 (Close out) in support of the allocation process within Gemini. Business rules within this modification (0664) state that performance is measured at an aggregate level (Shipper/Supplier) to account for faulty meters and problematic sites.   Initially, the CDSP will not seek to levy a charge for reclassifications actioned on behalf of the Shipper. However, this position will remain under review taking into consideration the volume of reclassification activity the CDSP has to undertake and the views of the PAC. If the charge is deemed as required than the cost value of such will be communicated out to customers by the CDSP. Under MOD 0664, “The CDSP will be entitled to charge Shippers on a Supply Point basis for all Supply Points that it reclassifies from Classes 2 and 3 to Class 4 on behalf of Shippers in each calendar month.” Whereas, under MOD 0692, there is no allowance for CDSP charging – if this does not answer the question then please let us know. Thank you. |

Change Management Committee Outcome

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| Change Status: | ☐ Approve | ☐ Reject | | | Defer |
| Industry Consultation: | 10 Working Days | | ☐ 15 Working Days | | |
| ☐ 20 Working Days | | ☐ Other [Specify Here] | | |
| Date Issued: | 19/04/2022 | | | | |
| Comms Ref(s): | 3015.2 – RT - PO | | | | |
| Number of Responses: | 2 | | | | |
| Solution Voting: | Shipper | | | Please select. | |
| ☐ National Grid Transmission | | | Please select. | |
| ☐ Distribution Network Operator | | | Please select. | |
| ☐ IGT | | | Please select. | |
| Meeting Date: | 11/04/2022 | | | | |
| Release Date: | Proposed November 22 | | | | |

Please send the completed representation response to [uklink@xoserve.com](mailto:uklink@xoserve.com)

Version Control

# Document

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| --- | --- | --- | --- | --- |
| Version | Status | Date | Author(s) | Remarks |
| V1.0 | Baselined | 07.04.2022 | Rajiv Patel |  |