



Business Process Design Diagrams – SUMMARY SHEET

Title of Paper	Customer Switching: Scenarios 1&2	
Description	Scenarios 1 and 2 represent a successful switch for dual fuel domestic consumer with SMETS 2 metering in credit or prepayment mode, respectively.	
Issue Owner (Accountable)	Jenny Boothe	
Responsible	Business Process Design Team (BPDT)	
Status of Process	1. Developed and agreed by BPDT	9 February 2016
	2. Reviewed by BPD User Group	22 February 2016
	3. Reviewed by EDAG	15 March 2016
Summary of issues for EDAG consideration	<p>EDAG members are invited to comment on any of the proposed business processes prior to them being submitted to the Design Authority for approval. In addition we wish to bring two specific issues to EDAG attention:</p> <ol style="list-style-type: none"> 1. Activity 1.4 'Execute switch' is not fully aligned with the requirements of P302. Which process should be adopted for Blueprint Baseline 1? 2. At what point in the switching process should the appointment and de-appointment of supplier agents be processed? 	

Impacts on Consumer Journey

Consumer Journey	The business process maps are designed to support 'next day' ¹ switching including reconfiguration of smart meters to reflect the contract terms agreed with the new supplier. The modifications proposed below should further improve the reliability and efficiency of the switching event.
------------------	--

¹ The definition of 'next day' will be finalised later in the Blueprint Phase but the business processes are being designed to support the tightest definition of 'next day', while recognising that a longer interval may be needed to ensure operational reliability.

CONTENT

Issues

Change of Supplier Read Process

1. The process maps (Process 1.4.6) show the losing and gaining suppliers retrieving meter readings for use in customer billing and settlement. It is assumed that the readings to be retrieved are the Daily Read Logs (as defined in SMETS 2) which are snapshots of the registers and balances taken at midnight each day. Specification of the Daily Read Log in SMETS was partly justified by the need for a reliable source of meter readings at Supplier Start Date (SSD).
2. At the User Group meeting on 22 February there was support for the process set out in the process diagrams but members identified that this arrangement conflicted with the requirements of the BSC modification P302 which is due to be implemented in June 2016.
3. P302 requires the new supplier to collect the total cumulative and time of use meter register readings retrieved from the meter at the point that it is reconfigured. This is expected to be at, or closely following midnight on SSD. This read is then sent to the losing supplier to be used in its close-out activity. The losing supplier will also take a meter read and the disputed reads process can be used in the event that differences are detected.
4. P302 was developed to mitigate the risk that the gaining supplier might not be able to gain access to the smart meter until some time (hours or possibly even a few days) after SSD. This might arise if suppliers or DCC were unable to deliver transactions in advance of SSD. As a consequence, the gaining and losing supplier might use marginally different reads for the consumer's closing and opening accounts, leading to under or over billing, with discrepancies also being recorded in settlements.
5. We propose that the central case presented in the process maps should be one where both suppliers independently access the Daily Read Log for the change of supplier meter read. This is based on an expectation that the risks that have led to the P302 solution do not materialise. This does not preclude reverting to the P302 process if DCC or suppliers' processes prevent the gaining supplier from accessing the smart meter at SSD.

View Required from EDAG

Is EDAG content to use the Daily Read Log as the central case with P302 retained as a contingency?

Notification of Supplier Agent Appointment/de-appointment process.

6. As part of the current switching arrangements, Suppliers are required to appoint agents to undertake activities on their behalf, including (for electricity) a Data Collector (DC), Meter Operator (MOP), Data Aggregator (DA) and (for gas) a Meter Asset Manager (MAM). The move towards a Supplier led switching process will also require a Supplier to notify the CRS of the identity of the gas Shipper.
7. In our initial drafting of the process maps the appointment of agents was undertaken after the switch had been executed (Process 1.5.1). This positioning was adopted to avoid a switch being aborted because of an invalid agent code. The draft process maps were discussed at the last User Group meeting which suggested that:
 - The gaining Supplier should nominate its chosen agents on the registration request it submits to CRS
 - Subject to acceptance of that registration request, the CRS would notify the agents and shipper nominated by the gaining Supplier that they had been appointed
 - As part of this notification, the CRS could also provide the identities of any other relevant agents (e.g. to notify the DA of the MOP)
8. The User Group considered that this approach would simplify the agent appointment process for both gas and electricity which, currently, involves a large number of files being exchanged.
9. At the meeting we recognised the potential benefits identified by the User Group and undertook to consider the implications of adopting this approach. Based on our analysis the implications would be:
 - If the registration request contained an invalid agent identification code the request would be rejected as invalid whereas under the initial process maps the registration request would be accepted, the switch would take place and agent appointments would be resolved subsequently. However the User Group view was that suppliers should be able to submit accurate agent codes and validation failures should be low
 - There would be no opportunity for an agent to reject an appointment – the existing arrangements allow an agent to reject an appointment and this had been carried forward into the draft process maps. Under the User Group proposal an agent rejecting an appointment would need to agree this bilaterally with the supplier who would then submit a change of agent transaction. Under current arrangements the number of agent rejections has fallen to a very low level
10. The new arrangements will need to cater for the situation where a supplier wishes to change its agents between switching events. This feature will enable suppliers to

reverse any agent appointments that are rejected: processes covering this will be included in the Metering Point Lifecycle process maps.

View required from EDAG

Having considered the User Group's proposal we have concluded that it offers a simpler approach for suppliers (all information is submitted to CRS in a single registration request transaction) and should not materially increase the risk of switches being delayed by validation errors. We invite views from EDAG as to whether any other factors should be taken into consideration and – if not – will update the process maps to reflect the User Group proposal.