

**DSC Change Proposal**

**Change Reference Number: XRN4753**

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Xoserve to fill out all of the information in this colour

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| **Section A1: General Details** | | |
| **Change Title** | CMS – Increase information provided in .QCL response file | |
| **Date Raised** | 03/08/2018 | |
| **Sponsor Organisation** | Brookfield Utilities | |
| **Sponsor Name** | John Cooper | |
| **Sponsor Contact Details** | John.cooper@bu-uk.co.uk / 01359 302450 | |
| **Xoserve Contact Name** | Paul Orsler | |
| **Xoserve Contact Details** | [Paul.orsler@xoserve.com](mailto:Paul.orsler@xoserve.com) / 0121 623 2060 | |
| **Change Status** | **P**roposal / With DSG / Out for Consultation / **Voting** / Approved or Rejected | |
| **Section A2: Impacted Parties** | | |
| **Customer Class(es)** | Shipper  National Grid Transmission  Distribution Network Operator  IGT | |
| **[Section A3: Proposer Requirements / Final (redlined) Change](C:\\Users\\Rebecca.perkins\\AppData\\Local\\Microsoft\\Windows\\Temporary Internet Files\\Content.Outlook\\EXD06YFG\\Change_Proposal_Template v2.0.docx" \o "WHAT – What is the required change? WHY – Why is the change needed? WHEN – Detail when the solution should be started/implemented.  )** | | |
| File Affected: .QCL file (response file from Contact Management Service)   1. Ensure following items are included, and made Mandatory within any QCL files issued by Xoserve (either by email or IX network) 2. Meter Point Reference Number – 3. Resolution Text (i.e. Rejection Reason) 4. QMP File Name (where Contact has been raised with CMS via QMP file) | | |
| **Proposed Release** | **TBC** | |
| **Proposed Consultation Period** | 10 Working Days  20 Working Days  30 Working days  Other: | |
| **[Section A4: Benefits and Justification](C:\\Users\\Rebecca.perkins\\AppData\\Local\\Microsoft\\Windows\\Temporary Internet Files\\Content.Outlook\\EXD06YFG\\Change_Proposal_Template v2.0.docx" \o "Benefit Description: What, if any, are the intangible and tangible benefits of the change?Benefit Realisation:When are the benefits of the change likely to be realised? Benefit Dependencies:Detail any dependencies that are outside the scope.)** | | |
| **Benefit Description**  *What, if any, are the tangible benefits of introducing this change?*  *What, if any, are the intangible benefits of introducing this change?* | | * Customers familiar with the Contact Management Service (CMS) will be aware that all Contacts raised are assigned a unique reference known as a Contact Reference Number * When Contacts are resolved (either Accepted or Rejected), an email containing a .QCL file is issued to the raising User * Additionally, a .QCL file is issued via IX to each organisation, detailing all Contacts that have been resolved (Accepted or Rejected) for their organisation each day * Current version of the file can be found attached;      * This response contains each of the Contacts resolved by Contact Reference Number, however limited information is not provided to inform the User of the MPRN and reasons for rejecting a Contact within .QCL files * Customers have fed back that it would be beneficial to include additional data items within the QCL file, namely;   + **MPRN –** which is currently depicted as ‘Optional’ within the file   + **Resolution text / Rejection Reasons –** also depicted as ‘Optional’ within the file   + **Associated QMP file details (i.e. file name)** * These items have been identified as being able to better assist Customers to process any Contacts that have failed to successfully update UK Link systems   This will allow customers to work through rejections in a more efficient manner and speed up the resolution of Contacts, which in turn will support maintenance of accurate and timely data being recorded in UK Link systems against Supply Meter Points. |
| **Benefit Realisation**  *When are the benefits of the change likely to be realised?* | |  |
| **Benefit Dependencies**  *Please detail any dependencies that would be outside the scope of the change, this could be reliance on another delivery, reliance on some other event that the projects has not got direct control of.* | |  |
| **Section A5: Final Delivery Sub Group Recommendations** | | |
| For information this has initially been presented to DSG on Monday 20th August. Attendees provided their support for the proposal, agreeing that there were benefits to improving the amount of information that can be provided in response to a CMS Contact. Following DSG it was agreed that a Change Proposal should be raised to take this forward.  The change has since been discussed several times at DSG (17th September, 19th November and 3rd December), with Change Management Committee confirming on 12th December that the change should remain a candidate for November 2019 Release. | | |
| **Final DSG Recommendation** | Approve / Reject / Defer | |
| **DSG Recommended Release** | Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY | |
| **Section A6: Funding** | | |
| **Funding Classes** | Shipper xx%  National Grid Transmission 0%  Distribution Network Operator xx%  IGT xx%  Current funding would be based on the associated Service Area, however as this change is reflects a customer Class that doesn’t currently fund Service Area 2, an alternative funding arrangement will need to be agreed. | |
| **Service Line(s)** | Service Area 2  Shippers =DS-CS SA2 – 01, DS-CS SA2 – 03  GTs and iGTs = ASGT-CS SA2-01 / ASiGT NC SA2-01 | |
| **ROM or funding details** | N/A | |
| **Funding Comments** | Funding to be agreed between iGTs and the other parties. The current charging methodology has been applied above. | |
| **Section A7: CHMC Recommendation** | | |
| **Change Status** | Approve – Issue to DSG  Defer – Issue to Consultation  Reject | |
| **Industry Consultation** | 10 Working Days  20 Working Days  30 Working days  Other: | |
| **Expected date of receipt for responses (to Xoserve)** | XX/XX/XXXX | |
| **DSC Consultation** | | |
| **Issued** | Yes  No | |
| **Date Issued** | 14th December 2018 | |
| **Comms Ref(s)** | 2178.4 – RJ - ES | |
| **Number of Responses** | TBC | |
| **Section A8: DSC Voting Outcome** | | |
| **Solution Voting** | Shipper Approve  National Grid Transmission NA  Distribution Network Operator Approve  IGT Approve  \*Outcome of 12/12/2018 meeting  09/01/2019  Two Shipper responses were in favour of a system change as a solution; two IGT responses were in favour of additional support and training as a solution. It was decided that it was down to the proposer to decide whether the change should be withdrawn, and a new Change Proposal to be raised. | |
| **Meeting Date** | 12/12/2018 / 09/01/2019 | |
| **Release Date** | 8th November 2019 | |
| **Overall Outcome** | Approved to be a candidate for November 2019 Release | |

**Please send the completed forms to:** [**mailto:box.xoserve.portfoliooffice@xoserve.com**](mailto:box.xoserve.portfoliooffice@xoserve.com)

**Section C: DSC Change Proposal: DSG Discussion**

**(To be removed if no DSG Discussion is required; Xoserve to collate where DSG discussions occur)**

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| **Section C1: Delivery Sub-Group (DSG) Recommendations** | |
| **DSG Date** | 17/09/2018 |
| **DSG Summary** | |
| The prioritisation score of 19% was presented to DSG. | |
| **Capture Document / Requirements** | N/A |
| **DSG Recommendation** | N/A |
| **DSG Recommended Release** | N/A |

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| **Section C2 05/11/18: Delivery Sub-Group (DSG) Recommendations** | |
| **DSG Summary** | |
| **17th September 2018**  Paul Orsler (PO) presented the latest position of this change to DSG; please refer to slide 35. Capture has been performed for this change. The customer requirements of this change were presented, and three solution options have been identified.   1. Provide support and training to customers to better understand files that are currently provided to them over IX 2. Make changes to existing email notifications to include additional data items specified 3. Create a new notification, allowing CMS users to retrieve data through other means   To support the development of the High Level Solution Option Impact Assessment, Paul asked DSG to take an action away to review the above solution options and think of any amendments/additions in preparation for the next DSG meeting.  PO also asked DSG to consider any additional requirements for this change. JB wanted to know which data items were missing from the QCL file: PO explained that the MPRN, resolution text and the associated resolution reason are missing.  PO explained that IGTs wanted additional information to be provided to them in the email notification they receive when they raise a contact in the CMS system.  PO admitted that Option 2 would have a data security risk as this option would involve the distribution of MPRNs, which is a confidential data item, via email; therefore, Option 3 was identified to mitigate this risk.  DSG did not provide any comments; PO asked them to direct any questions they may have to him until the next DSG meeting  **19th November 2018**  PO provided a verbal update to DSG. This Change Proposal is currently progressing through its High Level Solution Option Impact Assessment (HLSOIA); the HLSOIA is expected to be complete by the end of this week. Xoserve is looking at the three options that were presented at the previous DSG meeting:   1. Provide support and training to customers to better understand files that are currently provided to them over IX 2. Make changes to existing email notifications to include additional data items specified 3. Create a new notification, allowing CMS users to retrieve data through other means   PO previously asked DSG to review these solution options, with no comments being received from customers; PO confirmed that all three proposed options are therefore being considered as viable solutions as part of the HLSOIA being performed.  **3rd December 2018**  PO presented slide 31 to DSG. PO explained that this is a CMS related change, and was raised by the IGTs. PO reiterated the three solution options that are being assessed as part of the High Level Solution Option Assessment. These have already been presented at DSG:  1. Provide support and training to customers to better understand files that are currently provided to them over IX  2. Make changes to existing email notifications to include additional data items specified  3. Create a new notification, allowing CMS users to retrieve data through other means  PO said that option 1 is a zero cost change, and could be included within the 2019 training plans. Further work is ongoing with options 2 and 3; PO explained that costs are understood for option 2, but there are some outstanding GDPR questions to be addressed. These questions are being investigated by the Xoserve Legal Team and the service provider to Xoserve. After this, the costs for these options 2 can be presented.  PO said that Option 3 is likely to be the most costly as it would involve a change in the current CMS infrastructure. LW asked DSG members if they had any views on the three solution options. EL and JB expressed their support for Option 2, describing the option as ‘less invasive’. | |
| **Capture Document / Requirements** | **DSG to review the high level solution options associated with XRN4753 (Increase Information provided in .QCL Response File).** |
| **DSG Recommendation** | N/A |
| **DSG Recommended Release** | N/A |

**Section C: DSC Change Proposal: DSG Discussion**

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| **Section C3: Delivery Sub-Group (DSG) Recommendations** | |
| **DSG Date** | 17th December 2018 |
| **DSG Summary** | |
| PO advised this change was originally requested by IGT customers to increase the data provided to individual users following contacts being closed within CMS. PO went through the 3 solution options (detailed in slides 39 -47) covering impacts and costs. PO confirmed that Change Management Committee have kept XRN4753 as a candidate for November 19 Release. XRN4753 High Level Solution option Assessment went out in a Change Pack on Friday 14th December for customers to review and provide representations. PO noted that the change is currently seen as being beneficial to multiple customer classes, with costs being split between these customers. DSC Change Management representatives will be asked to approve the preferred solution option, along with agreeing the appropriate charging basis at Change Management Committee in January 2019. | |
| **Capture Document / Requirements** | N/A |
| **DSG Recommendation** | N/A |
| **DSG Recommended Release** | N/A |

**Section D: DSC Change Proposal High Level Solution Options**

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| **Section D1: Solution Options** | |
| **High Level summary options** | |
| **Solution Option 1:** Provide support and training to customers to better understand files that are currently provided to them over IX.  It has been established that the additional information IGTs are looking for is already available within the .QCL file they and other customers receive daily from the CMS system via the IX gateway. Training and awareness could be provided by Xoserve to those customers that require this, without the need to progress with a change to central systems.  **Solution Option 2:** Make changes to existing automated CMS emails to individual users, to attach the QCL data for their related contacts in an encrypted format. This Option would provide individual users of the contacts they have raised which have been cleared within a spreadsheet which would be attached to the email they receive from CMS.  **Solution Option 3:** Create a new notification, allowing CMS users to retrieve data through other means such as direct link to the contact screen. This Option would enable individual users to follow a link within the emails they receive from CMS, which will navigate them to the appropriate screen within CMS to view all associated information for the Contact which has been cleared.  **Detail of the High Level Solution Options can be found in the presentation attached;** | |
| **Implementation date for this solution option** | November 2019 Major Release |
| **Xoserve preferred option; including rationale** | N/A |
| **DSG preferred solution option; including rationale** | Customers have noted a preference for both Option 1 and Option 2, subject to Xoserve providing details on the likely costs and scale of change in the form of High Level Solution Option Assessment. |
| **Consultation close out date** | Friday 4th January 2019 |

**Section E: DSC Change Proposal: Industry Response Solution Options Review**

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| **User Name** | **Eleanor Laurence** | |
| **User Contact Details** | [**Eleanor.laurence@edfenergy.com**](mailto:Eleanor.laurence@edfenergy.com) **/ 07875 117771** | |
| **Section E1: Organisation’s preferred solution option, including rationale taking into account costs, risks, resource etc.** | | |
| We support Option 2.  The additional information would make it much easier to differentiate if we raise multiple cases, without the need to log into systems.  Also the rejection detail being included would be useful for users. | | |
| **Implementation date for this option** | | Approve |
| **Xoserve preferred solution option** | | N/A |
| **DSG preferred solution option** | | Approve |
| **Publication of consultation response** | | Publish |
| **Section E1: Xoserve’ s Response to Organisations Comments** | | Thank you for your comments. |

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| **User Name** | **Amie Charalambous** | |
| **User Contact Details** | **07917271763** | |
| **Section E2: Organisation’s preferred solution option, including rationale taking into account costs, risks, resource etc.** | | |
| Our preferred option would be to support option 1. | | |
| **Implementation date for this option** | | Approve |
| **Xoserve preferred solution option** | | N/A |
| **DSG preferred solution option** | | N/A |
| **Publication of consultation response** | | Publish |
| **Section E2: Xoserve’ s Response to Organisations Comments** | | Thank you for your comments. |

**Appendix 1**

**Change Prioritisation Variables**

Xoserve uses the following variables set for each and every change within the Xoserve Change Register, to derive the indicative benefit prioritisation score, which will be used in conjunction with the perceived delivery effort to aid conversations at the DSC ChMC and DSC Delivery Sub Groups to prioritise changes into all future minor and major releases.

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| **Change Driver Type** | CMA Order  MOD / Ofgem  EU Legislation  License Condition  BEIS  ChMC endorsed Change Proposal  SPAA Change Proposal  Additional or 3rd Party Service Request  Other*(please provide details below)* |
| **Please select the customer group(s) who would be impacted if the change is not delivered** | Shipper Impact iGT Impact Network Impact Xoserve Impact National Grid Transmission Impact |
| **Associated Change reference Number(s)** | **None** |
| **Associated MOD Number(s)** | **None** |
| **Perceived delivery effort** | 0 – 30  30 – 60  60 – 100  100+ days |
| **Does the project involve the processing of personal data?**  *‘Any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier’ – includes MPRNS.* | Yes *(If yes please answer the next question)*  No |
| **A Data Protection Impact Assessment (DPIA) will be required if the delivery of the change involves the processing of personal data in any of the following scenarios:** | New technology  Vulnerable customer data  Theft of Gas  Mass data  Xoserve employee data  Fundamental changes to Xoserve business  Other*(please provide details below)*  **MPRNs**  *(If any of the above boxes have been selected then please contact The Data Protection Officer (Sally Hall) to complete the DPIA.* |
| **Change Beneficiary**  *How many market participant or segments stand to benefit from the introduction of the change?* | Multiple Market Participants  Multiple Market Group  All industry UK Gas Market participants  Xoserve Only  One Market Group  One Market Participant |
| **Primary Impacted DSC Service Area** | Service Area 2: Provide Query Management |
| **Number of Service Areas Impacted** | All  Five to Twenty  Two to Five  One |
| **Change Improvement Scale?**  *How much work would be reduced for the customer if the change is implemented?* | High  Medium  Low |
| **Are any of the following at risk if the change is not delivered?** | |
| Safety of Supply at risk Customer(s) incurring financial loss  Customer Switching at risk | |
| **Are any of the following required if the change is delivered?** | |
| Customer System Changes Required  Customer Testing Likely Required  Customer Training Required | |
| **Known Impact to Systems / Processes** | |
| **Primary Application impacted** | BW  ISU  CMS  AMT  EFT  IX  Gemini  Birst  Other *(please provide details below)* |
| **Business Process Impact** | AQ SPA RGMA  Reads Portal Invoicing  ☐ Other *(please provide details below)* |
| **Are there any known impacts to external services and/or systems as a result of delivery of this change?** | Yes *(please provide details below)*  No |
| **Please select customer group(s) who would be impacted if the change is not delivered.** | Shipper impact  Network impact  iGT impact  Xoserve impact  National Grid Transmission Impact |
| **Workaround currently in operation?** | |
| **Is there a Workaround in operation?** | Yes  No |
| **If yes who is accountable for the workaround?** | Xoserve  External Customer  Both Xoserve and External Customer |
| **What is the Frequency of the workaround?** |  |
| **What is the lifespan for the workaround?** |  |
| **What is the number of resource effort hours required to service workaround?** |  |
| **What is the Complexity of the workaround?** | Low *(easy, repetitive, quick task, very little risk of human error)*  Medium *(moderate difficult, requires some form of offline calculation, possible risk of human error in determining outcome)*  High *(complicate task, time consuming, requires specialist resources, high risk of human error in determining outcome)* |
| **Change Prioritisation Score** | 19% |

**Document Version History**

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| --- | --- | --- | --- | --- |
| **Version** | **Status** | **Date** | **Author(s)** | **Summary of Changes** |
| 1.0 | Going to ICAF | 03/09/18 | Paul Orsler |  |
| 2.0 | Approved at ChMC | 14/09/18 | Paul Orsler | On 12/09/2018, ChMC approved this change to proceed to DSG |
| 3.0 | DSG Notes | 20/09/18 | Paul Orsler | DSG notes added from the meeting on 17/09/18 |
| 4.0 | DSG Notes | 16/11/18 | Rachel Taggart | DSG notes added from the meeting on 05/11/18 |
| 5.0 | HLSOA | 22/11/18 | Rachel Taggart | Solution Options presented to DSG for HLSOA |
| 6.0 | With DSG | 10/12/18 | Richard Johnson | DSG notes added from meeting on 3rd December 2018 |
| 7.0 | Solution Review | 14/12/18 | Richard Johnson | Submitted for a solution review change pack |
| 8.0 | With DSG | 27/12/18 | Richard Johnson | DSG notes added from the meeting on 17/12/18 |
| 9.0 | Out for consultation | 04/01/19 | Richard Johnson | Solution review reps added |
| 10. | Voting | 11/01/19 | Richard Johnson | Notes from ChMC meeting on 09/01 added to section A8 |

**Template Version History**

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| --- | --- | --- | --- | --- |
| **Version** | **Status** | **Date** | **Author(s)** | **Summary of Changes** |
| 3.0 | Approved | 17/04/2018 | Emma Smith | Template approved at ChMC on 11th July |