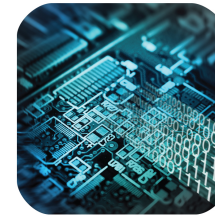


# xserve



respect > commitment > teamwork

## Class Changes

24th October 2014



# Introduction

---

- This presentation aims to provide an overview of the process for Class change specifically the reconciliation and Check Read processes.
- The presentation also covers scenarios where there is a Shipper Transfer and Class change combined.
- Where a combined change of Shipper and Class change is associated with DRE/AMR equipment the focus is around apportioning the drift following a Check Read.

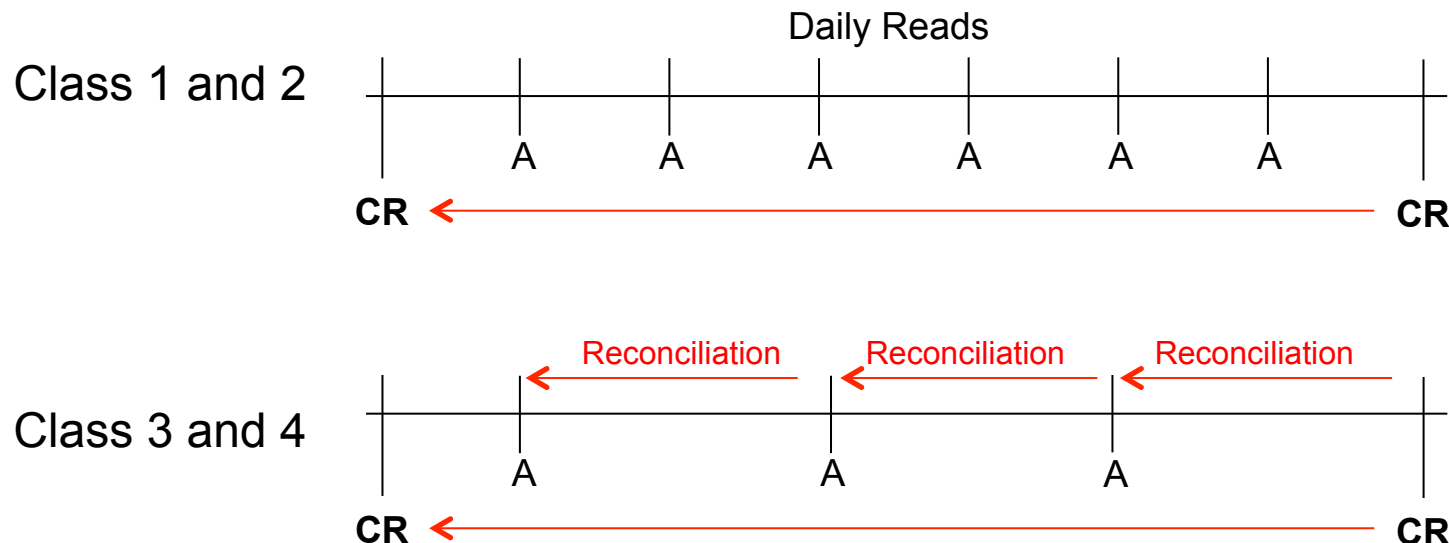
**xserve**



respect > commitment > teamwork

# Why have a Check Read

- Check Reads are required where equipment (AMR) is installed that derives the reads from the meter.
- The Check Read identifies where the meter and the equipment are not synchronised and will detect any drift between the meter and the equipment. Any drift is then apportioned across the relevant period.



xserve



respect > commitment > teamwork

# Class Change

Process Description	Process for initial Allocation	Process for Energy Balancing close-out	Read Submission Timescales	Type of Read Submission	AQ Calculation	Reconciliation
<b>Class 1 – Daily Metered Time Critical Readings</b>	Uses daily read	Uses daily read	By 11am on GFD+1	All reads daily on GFD+1	Monthly using Optimum Read	Meter Point level following a site visit or estimate
<b>Class 2 - Daily Metered not Time Critical Readings</b>	Transporter estimate	Uses daily read	By end of GFD+1 (05.59 am)	All reads daily by end of GFD+1	Monthly using Optimum Read	Meter Point level following a site visit or estimate
<b>Class 3 – Batched Daily Readings</b>	Allocation Profiles	Allocation Profiles	Daily Reads in batches	All daily reads in batches	Monthly using Optimum Read	Daily Rec at Meter Point level on receipt of a batch of reads
<b>Class 4 – Periodic Readings</b>	Allocation Profiles	Allocation Profiles	Periodic	Periodic reads	Monthly using Optimum Read	Meter Point level at receipt of read

**Xserve**



respect > commitment > teamwork

# Terms Used

---

- **DRE:** Daily Read Equipment
- **AMR:** Automatic Read Equipment
- **GFD:** Gas Flow Day
- **CR:** Check Read
- **A:** Actual Read
- **N:** Cyclic Read
- **E:** Estimate Read
- **D:** Effective date of the Class Change

**xserve**



respect > commitment > teamwork

# General Principles

- Where DRE/AMR is installed for Class 2, 3 & 4 the kit is not changed on a Class change only event.
- For a change in Class an Actual read is required to close out the outgoing Class.
- The Actual Read provided for the effective date of the Class change will not be subject to the read tolerance validations only standard asset validation (serial number, dials and units etc.)
  - This is because the read may not follow on from the previous read due to the difference between the on-site reading and the derivable reads.
- On Class Change only event the Check Read will reconcile back to the previous Check Read or AMR/DRE Installation Read.
- When AMR/DRE equipment is installed the first Check Read received will reconcile back to the previous Check Read or Installation Read.

**Xserve**



respect > commitment > teamwork

# General Principles - Reconciliation

- There are 3 steps for energy allocation/reconciliation for Class 3 and 4 Supply Meter Points where AMR equipment is installed
  - a) Daily Allocations are based on the Demand Estimation Formula.
  - b) An Actual Read received will trigger reconciliations.
    - Daily for Class 3
    - Periodic for Class 4
  - c) Following receipt of a Check Read reconciliation will be triggered back to the previous Check Read
    - In the cases of a Shipper Transfer this will be the opening read.
- Where AMR/DRE is fitted on a Class 3 or 4 Reconciliation will be processed first followed by the Check Read Reconciliation (apportion the drift across the period).
- For Class 1 and 2 any replaced meter readings received outside of close-out will trigger Reconciliation.

**xserve**



respect > commitment > teamwork

# General Principles – Shipper Transfer

- For Class 1 and 2, any reads received following a Shipper Transfer that fail validation will generate an Estimated Read. On receipt of a valid actual read the Estimated Reads will be re-calculated (better estimates) back to the Shipper Transfer/Class change day.
- If the Check Read is not provided for the Class change date for a Shipper Transfer within the UNC timescales then an Estimate Read will be calculated and treated as a Check Read.
  - Class 2 within GFD+5
  - Class 3 & 4 within Month+10
- For a Shipper Transfer where the outgoing Class is Class 1 or 2 the D-1 volume will be estimated for Allocation purposes, either using D-7 or AQ/365.
  - This is to ensure that the drift is allocated to the correct period (previous Check Read) rather than the total drift allocated to the day before the Class change
- On Shipper Transfer where AMR/DRE equipment is fitted the Opening Read received will be treated as a Check Read and therefore will trigger Reconciliation back to the last Check Read. This will close out the position for the Outgoing Shipper.

 Xserve



respect > commitment > teamwork



# Files Formats

- The reads will be provided on the following communication methods:

## Incoming Methods:

Class Type	File
Class 2	UDR
Class 3	UBR
Class 4	UMR
Class 2 Site Visit Details	Web Services
Class 3 & 4 Site Visit Details	SFN

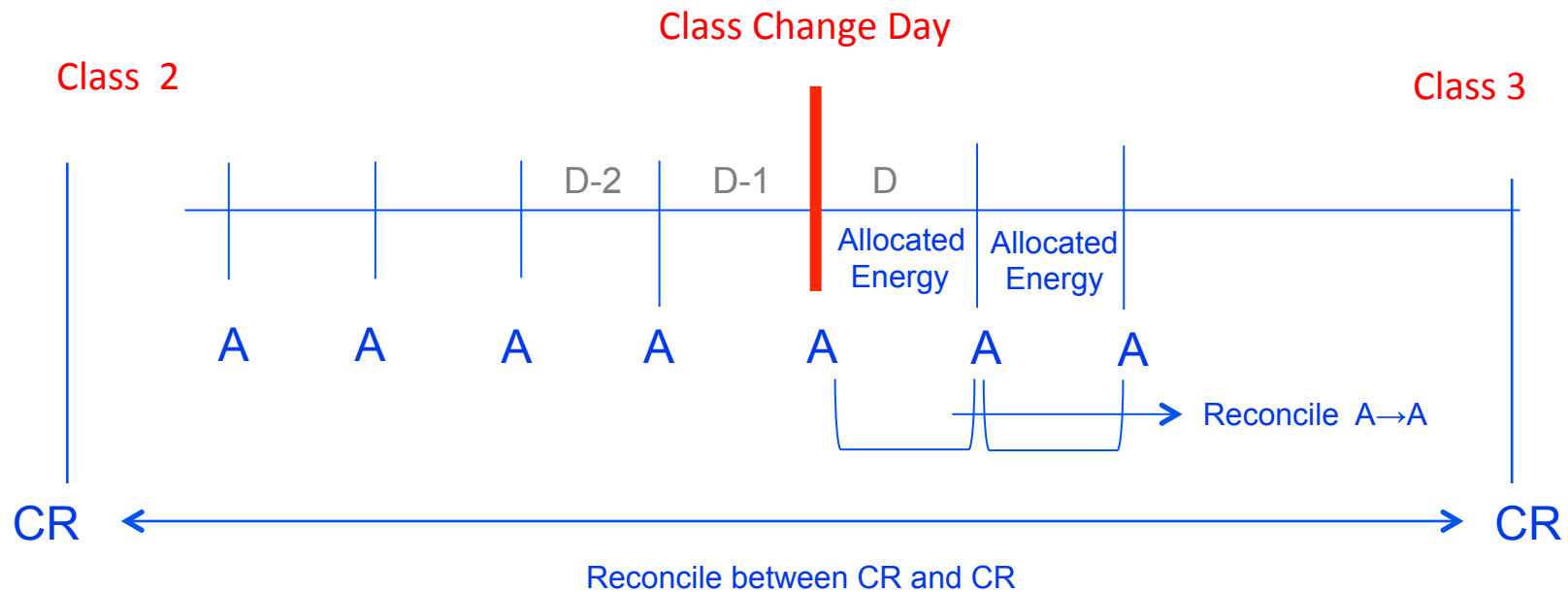
xserve



respect > commitment > teamwork

# Same Shipper Class change, Class 2 to 3, DRE/AMR fitted.

## Scenario A: Opening read provided



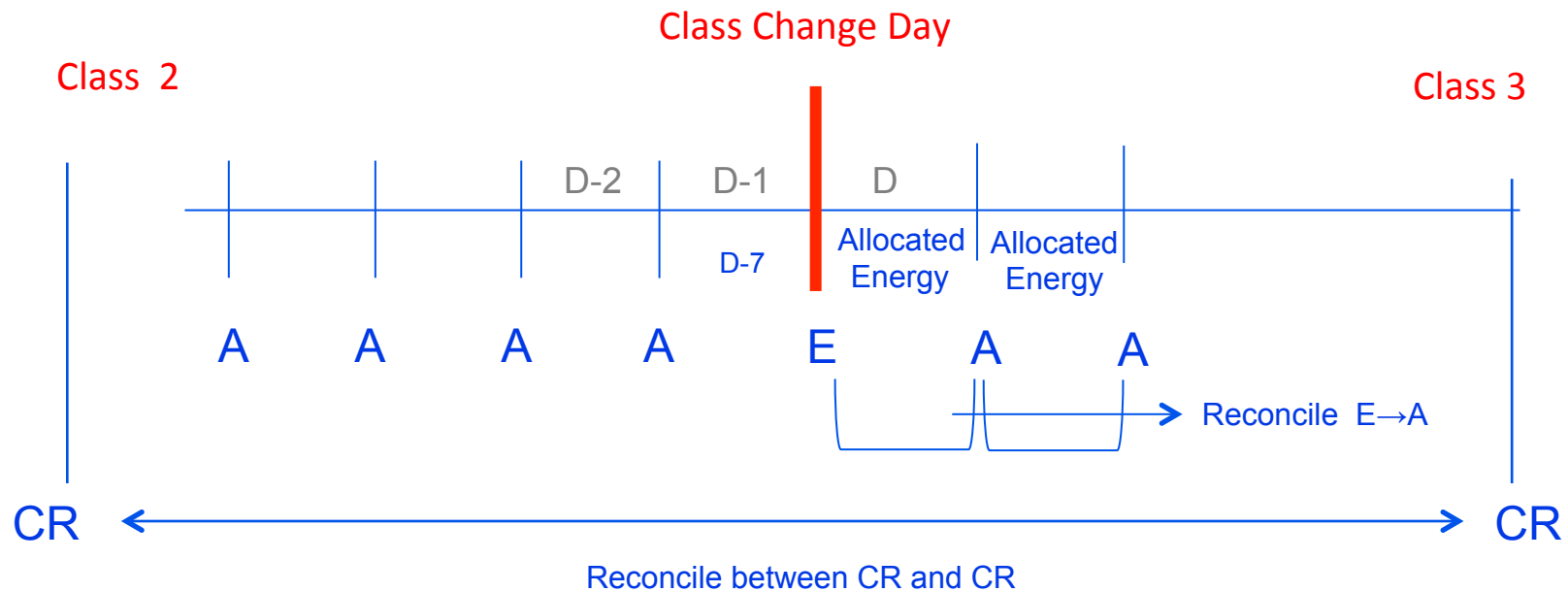
**xserve**



respect > commitment > teamwork

# Same Shipper Class change, Class 2 to 3, DRE/AMR fitted.

## Scenario A: Opening read not provided

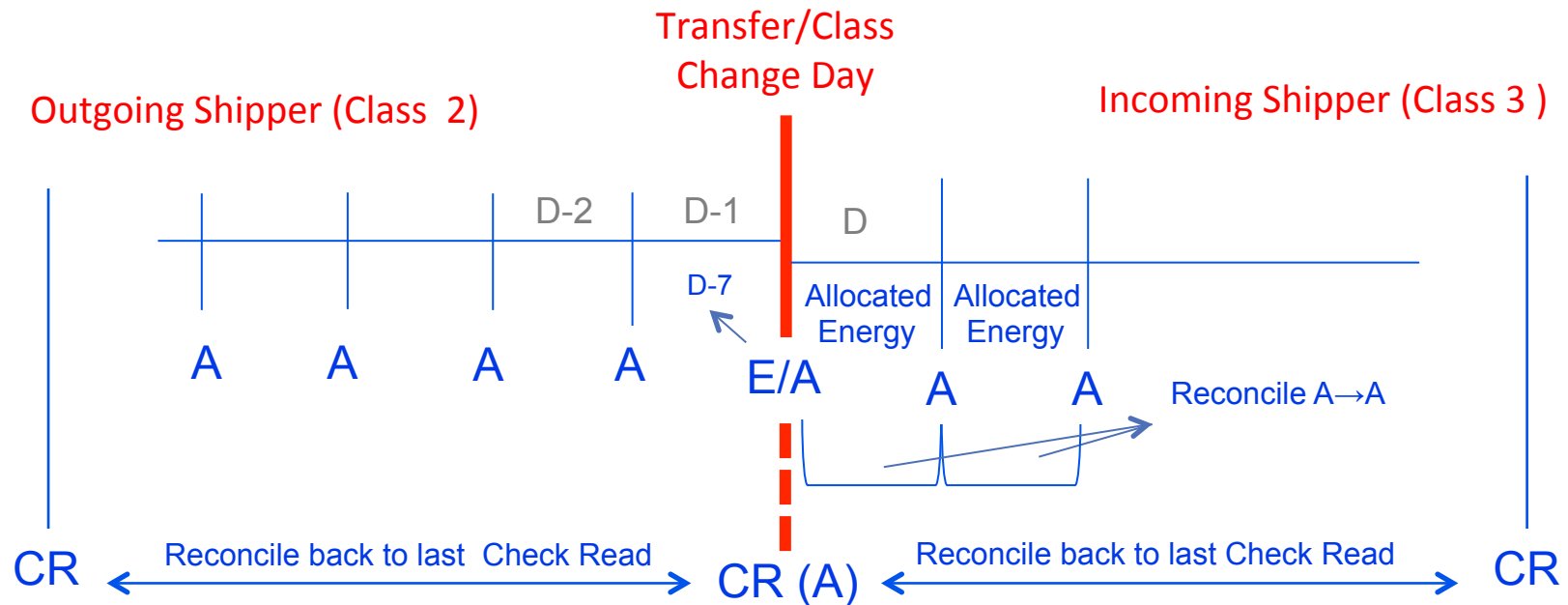


xserve



respect > commitment > teamwork

# Shipper Transfer with Class Change, Class 2 to 3, DRE/AMR fitted, Opening Read provided by Incoming Shipper.

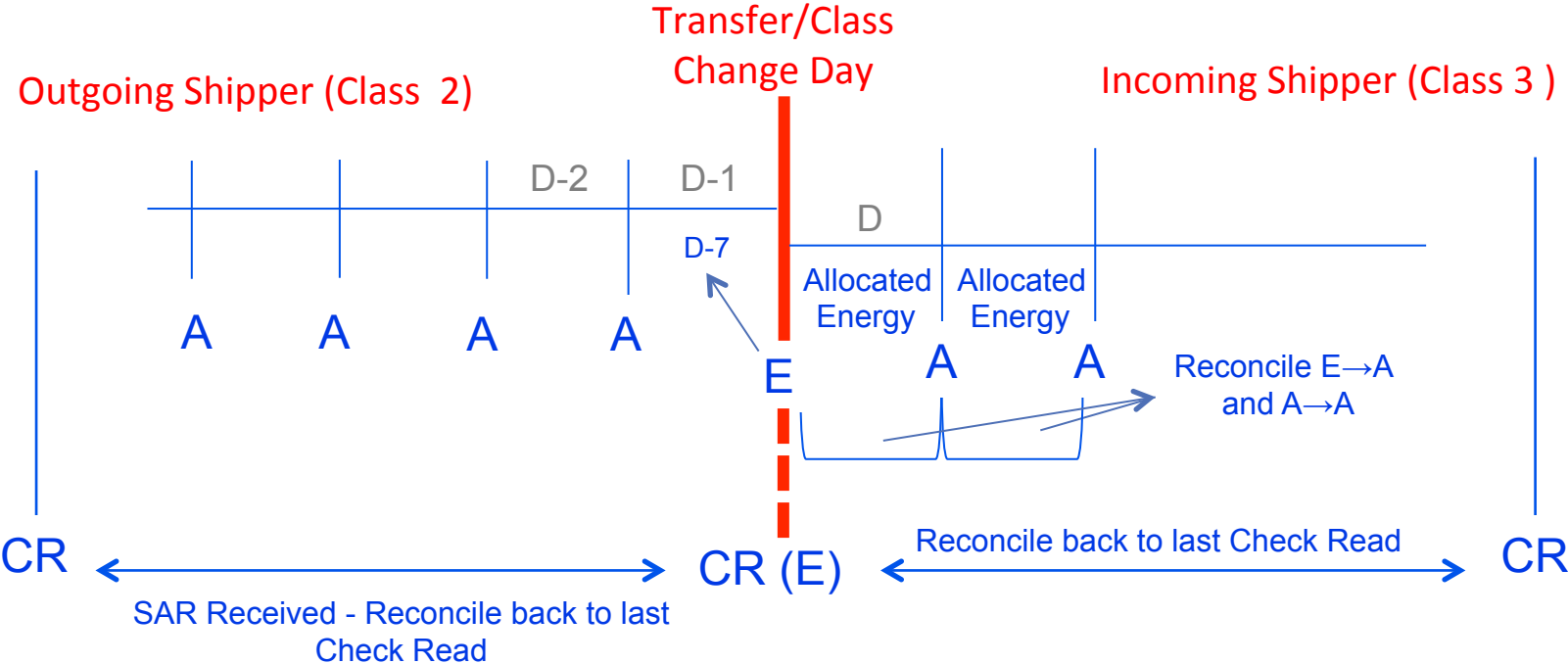


xserve



respect > commitment > teamwork

# Shipper Transfer with Class Change, Class 2 to 3, DRE/AMR fitted, No Opening Read provided by Incoming Shipper.



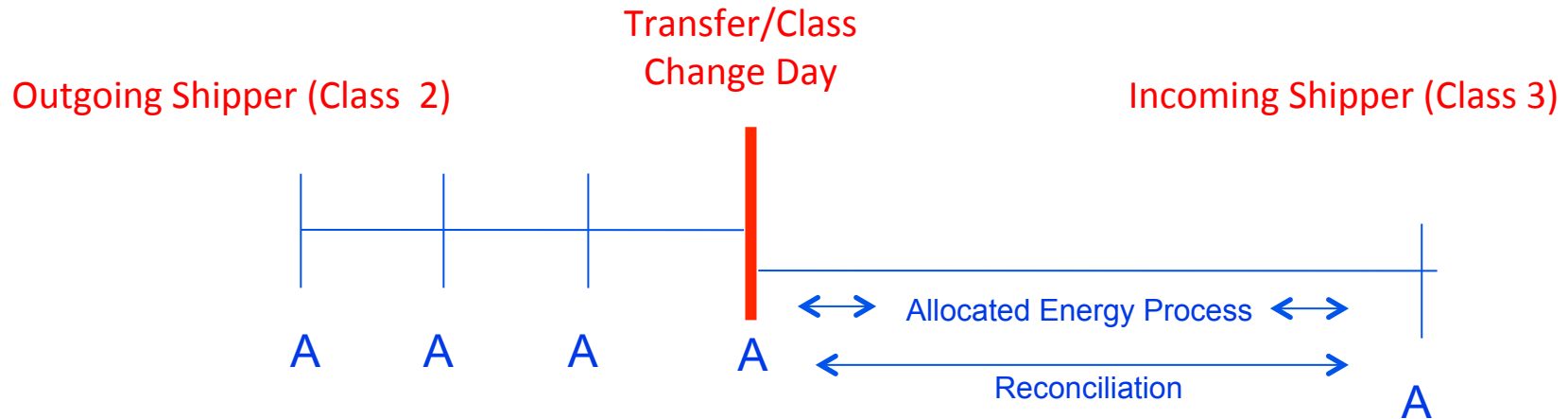
**xserve**



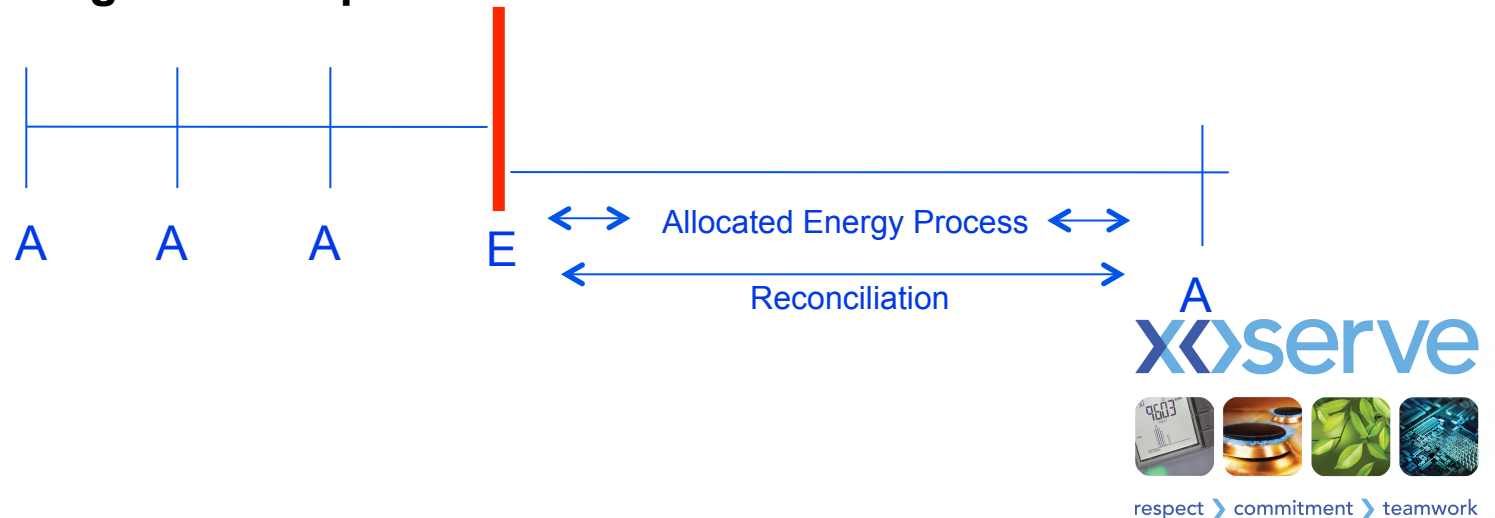
respect > commitment > teamwork

# Shipper Transfer with Class Change, Class 2 to 3, No DRE/AMR fitted.

## Scenario A: Opening read provided

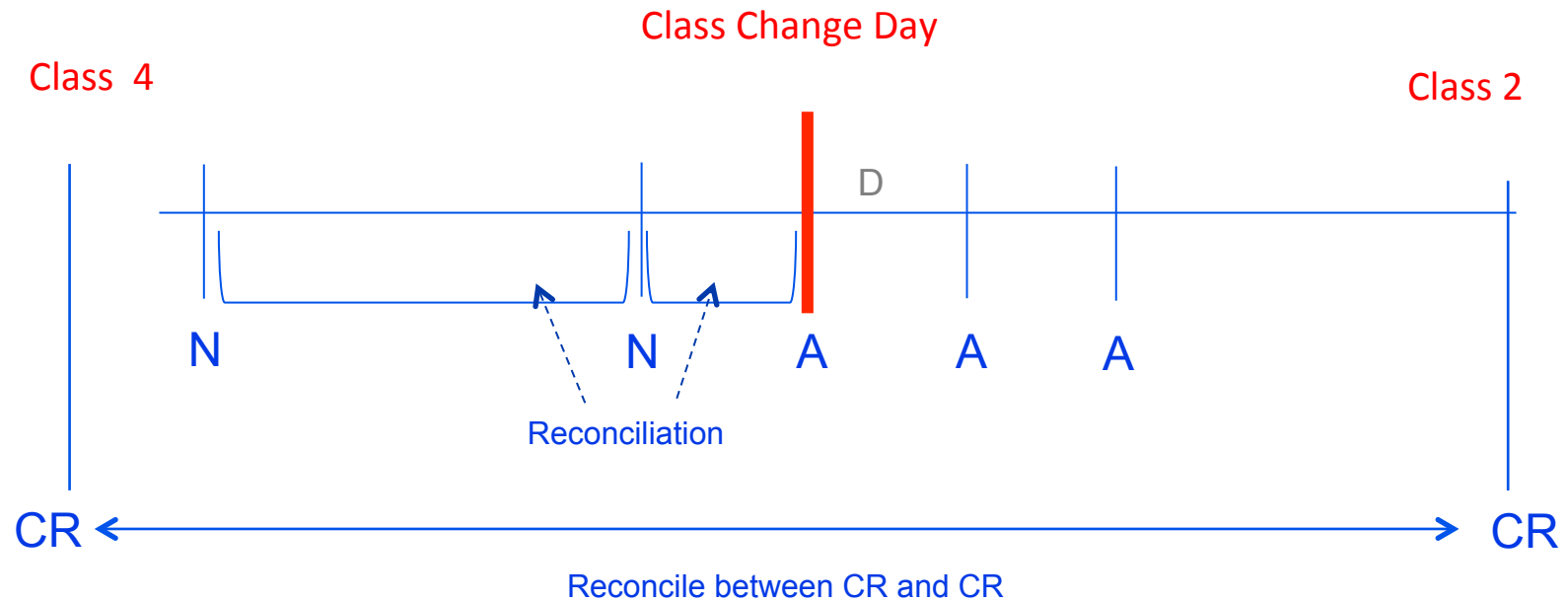


## Scenario B: Opening read Not provided



## Same Shipper Class Change, Class 4 to 2

### Scenario A: Opening read provided – AMR/DRE Fitted



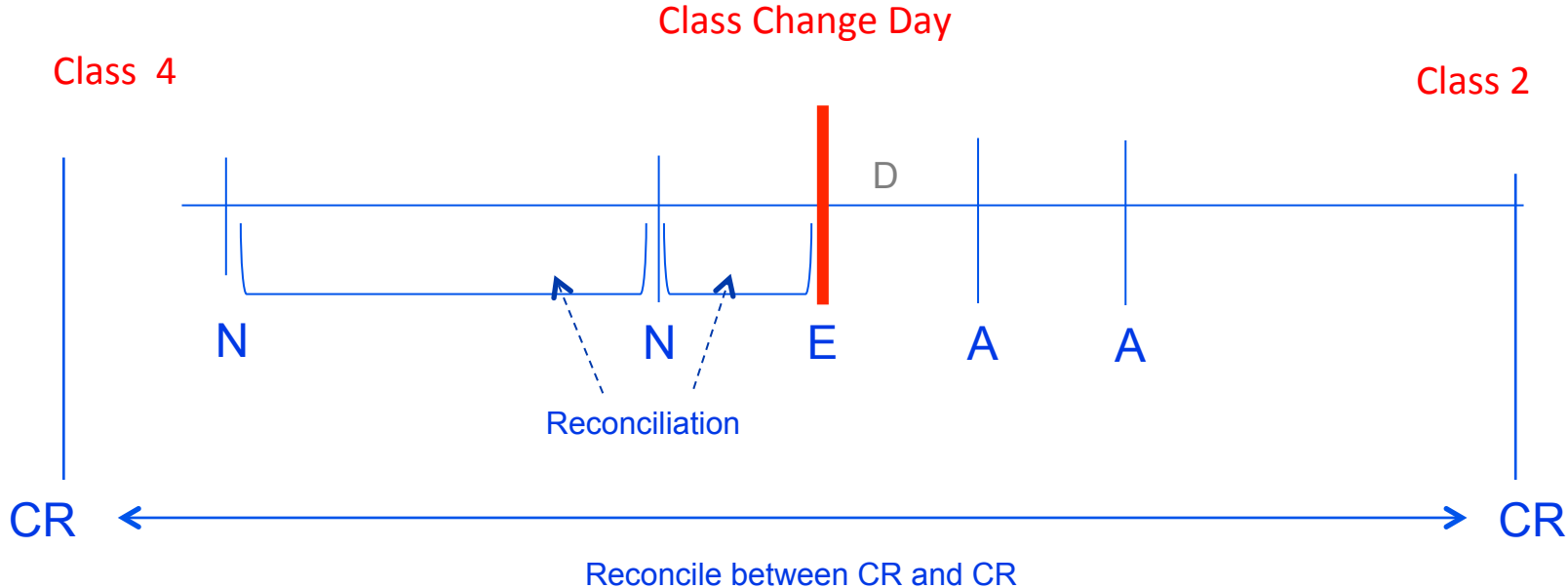
xserve



respect > commitment > teamwork

# Same Shipper Class Change, Class 4 to 2

## Scenario B: Opening read not provided – AMR/DRE Fitted

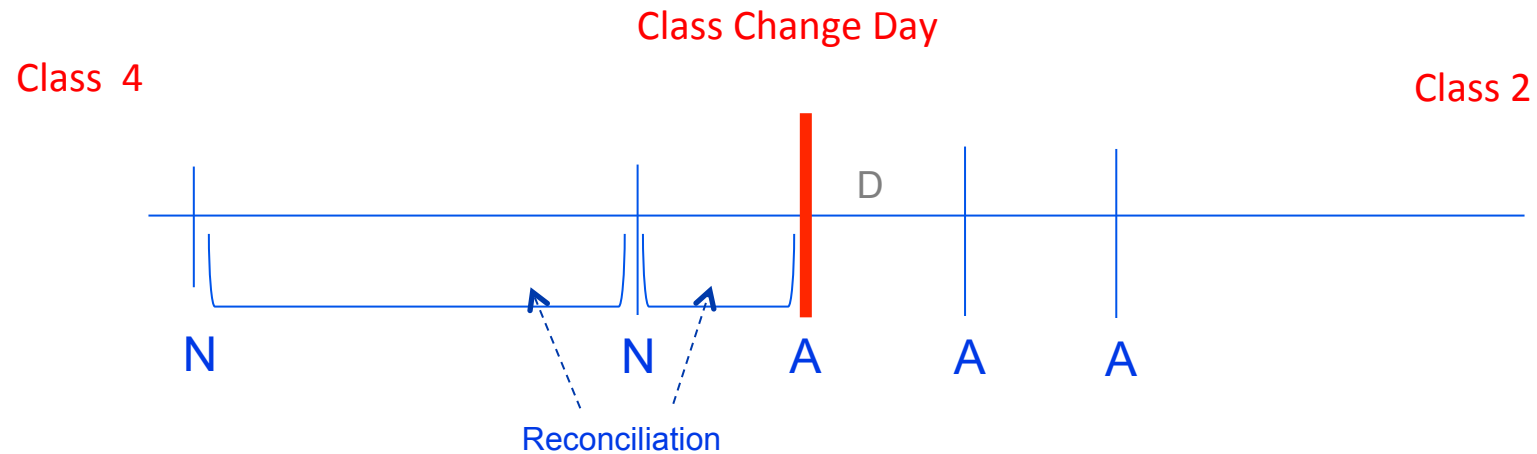


respect > commitment > teamwork



## Same Shipper Class Change, Class 4 to 2

### Scenario C: Opening read provided – No AMR/DRE Fitted



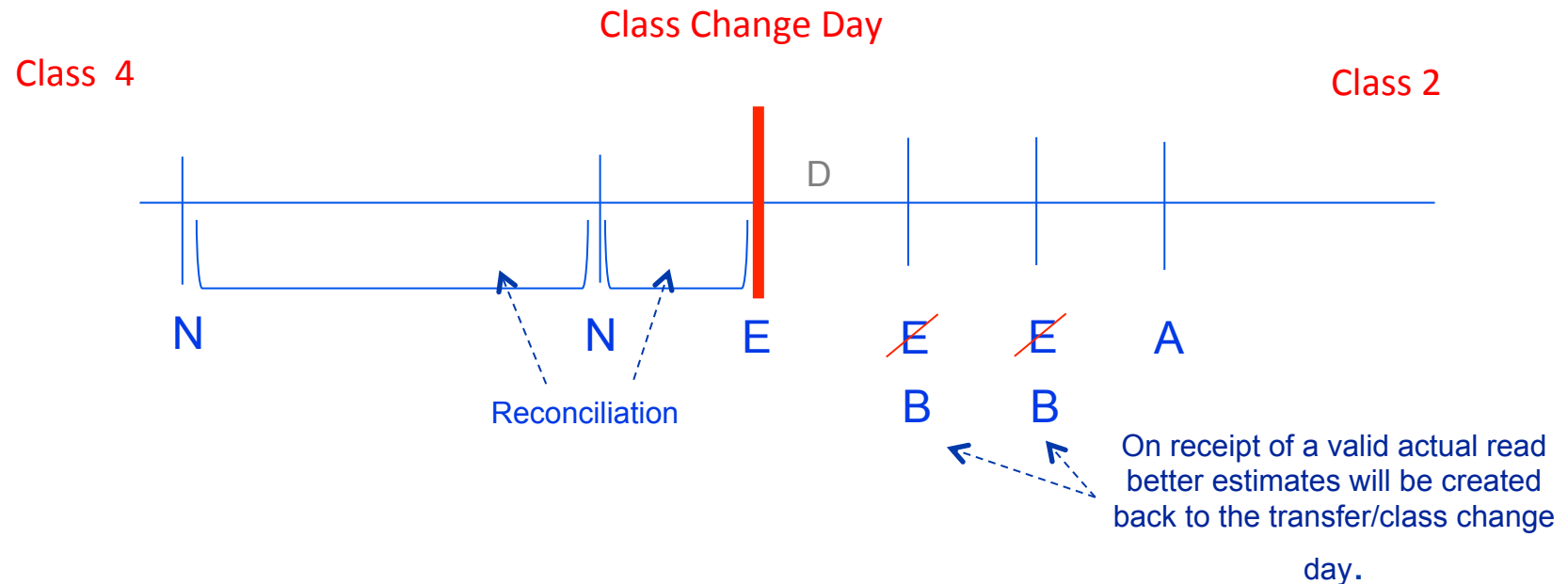
xserve



respect > commitment > teamwork

## Same Shipper Class Change, Class 4 to 2

### Scenario D: Opening read not provided – No AMR/DRE Fitted



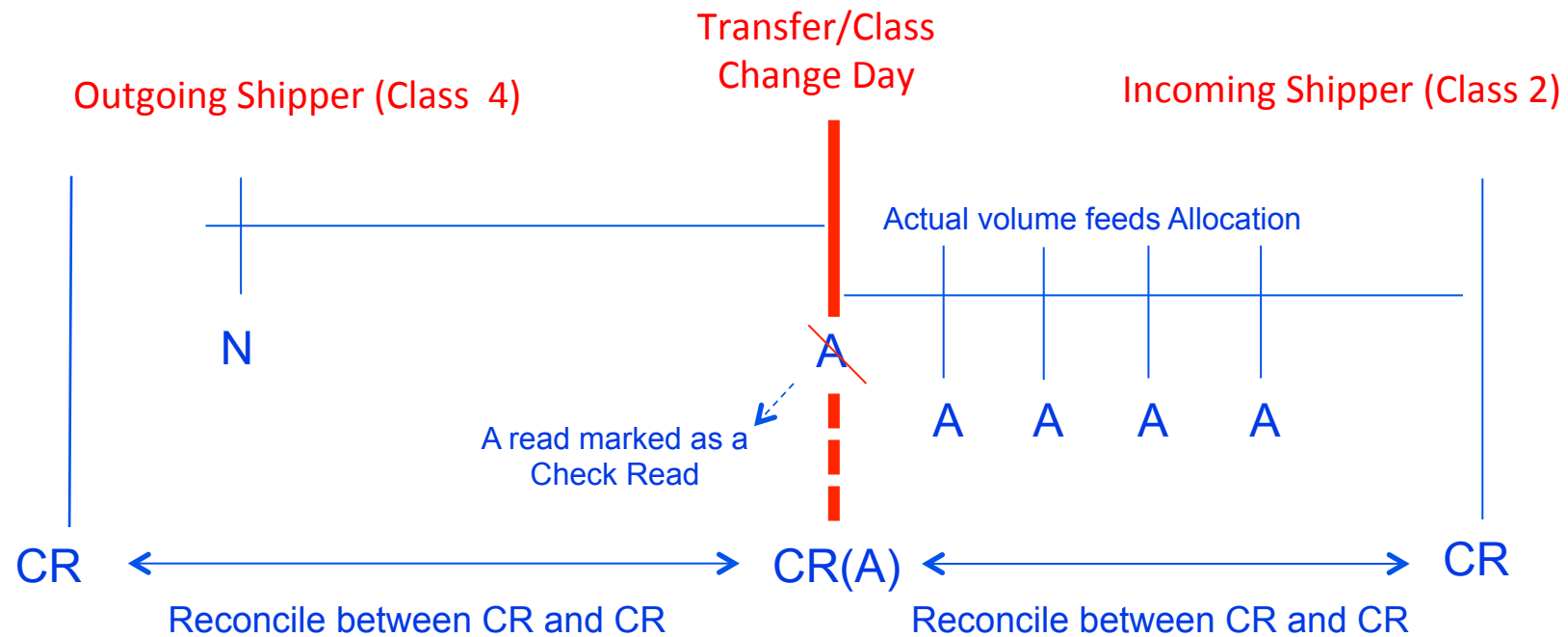
If subsequent Actual reads following the Class change date fail validation Estimated Reads will be generated. When the next valid Actual is received the estimated reads will be replaced with better estimates.

xserve



respect > commitment > teamwork

# Shipper Transfer with Class Change, Class 4 to 2, DRE/AMR fitted, Opening Read provided by Incoming Shipper.

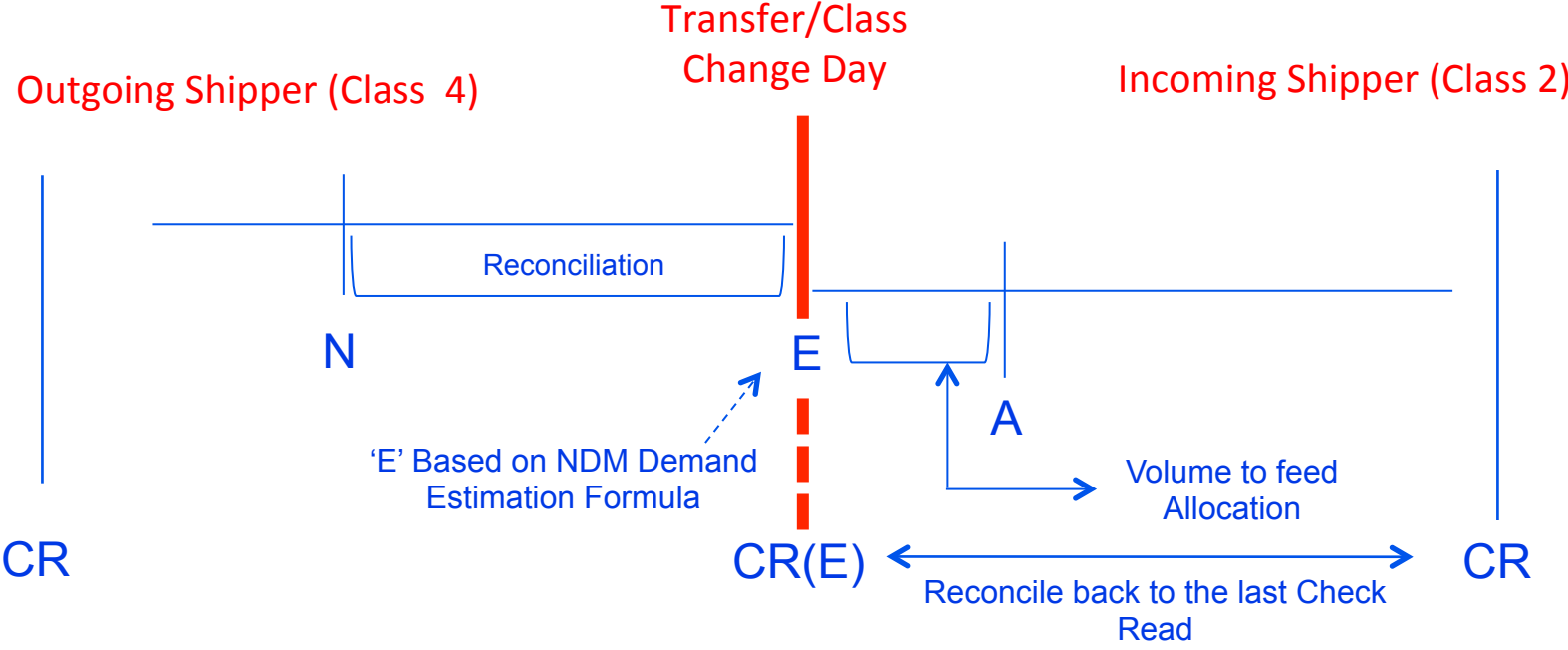


xserve



respect > commitment > teamwork

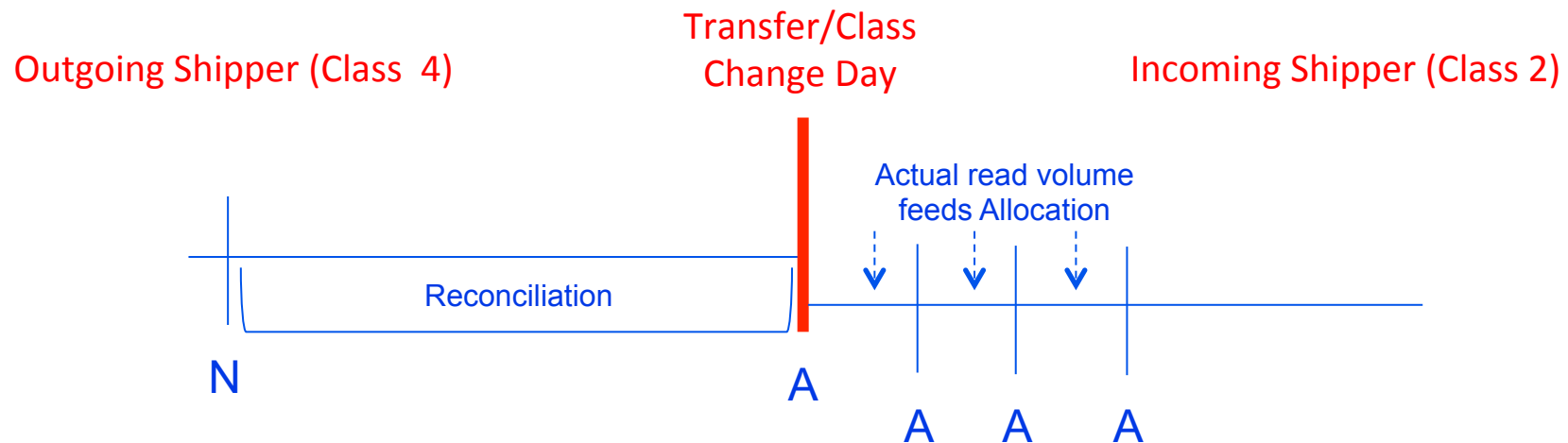
# Shipper Transfer with Class Change, Class 4 to 2, DRE/AMR fitted, No Opening Read provided by Incoming Shipper.



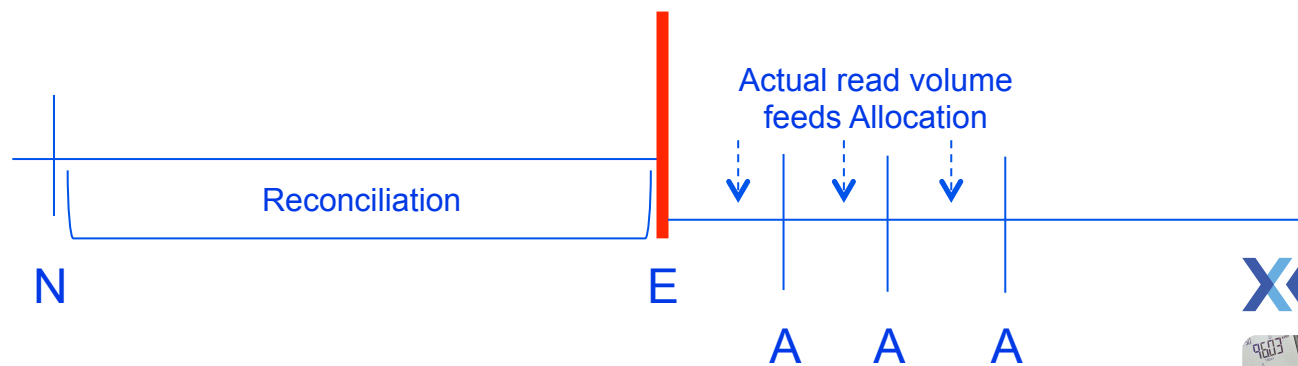
respect > commitment > teamwork

# Shipper Transfer with Class Change, Class 4 to 2, No DRE/AMR fitted.

## Scenario A: Opening read provided



## Scenario B: Opening read not provided



xserve



respect > commitment > teamwork

# Consumption Adjustments

---

- For Class 2, Consumption Adjustments can be provided for:
  - a) A day
  - b) For a period - per day between two Check Reads
  
- Submission of a Consumption Adjustment for Class 1 and 2 Supply Meter Points will be via:
  - a) Within Submission of GFD+5 via Web Services
  - b) Outside GFD+5 through CMS
  
- Submission of Consumption Adjustments for Class 3 and 4 Supply Meter Points will be submitted via CMS.
  - a) The Consumption Adjustments are provided as a total between two read dates

**xserve**



respect > commitment > teamwork

# xserve



respect > commitment > teamwork

