ELEXON

Technical Assurance of Metering (TAM) Technique Headline Report

Technical Assurance of Metering Expert Group (TAMEG)

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Summary — The Technical Assurance of Metering (TAM) Technique Headline Report provides updates to the TAMEG on current and upcoming work streams, so it may advise and propose improvements to Elexon in respect of the relevant Code Subsidiary Documents (CSDs) and Section L of the Balancing and Settlement Code (BSC).

1. TAM Reporting Review

1.1 At its August 2020 meeting (PAB235), the Performance Assurance Board (PAB) approved recommendations for Elexon to review the Technical Assurance Agent (TAA) reporting. The primary objective of the review is to streamline reporting and ensure that all stakeholders have ready access to the appropriate information.

1.2 Elexon will be providing the TAMEG and the PAB with quarterly stats reports, from which feedback may be obtained. Furthermore, new BSC Party specific reports will be made available to audit participants at the end of the 2020/21 audit year. We will also explore embedding the reports into the Technical Assurance Agent Management Tool (TAAMT), so that the reports are available to users on demand.

1.3 The 'TAM Stats Report' published at the October 2020 TAMEG is the first prototype for the new quarterly reporting, for which Elexon invites feedback from the TAMEG. At this time it only includes Desktop Audit results, as there have been no Inspection Visits this audit year.

2. Technical Assurance of Metering Management Tool (TAAMT) 2

2.1 As part of the re-procurement of the TAA role (finalised in May 2020), C&C Group committed to providing Elexon with a technical refresh of the TAAMT tool, which will be delivered by April 2021. This involves upgrading the back-end of the TAAMT system, as well as updating some of the front-end visual elements of the tool.

2.2 The first iteration of TAAMT2 will maintain the same functionality of the current TAAMT tool, but will provide a foundation from which system improvements can be built. Elexon has started to catalogue system improvements and will share these with, and invite comment from, the TAMEG, prior to deployment in future TAAMT2 releases.

3. Desktop Audits

3.1 The TAM Desktop Audit process was implemented in April 2020, with the Optional Desktop Audit sample starting in July 2020. Optional Desktop Audits have been used for the Measurement Class E[1] Specific Sample, which has allowed Elexon and the TAA to monitor the new process and identify limitations and improvements. Furthermore, the findings provide an initial view on Measurement Class E record quality and availability.

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[1] Measurement Class E – Half Hourly Metering Systems at below 100kW Premises with current transformers.

Desktop Audit Review

3.2   Elexon and the TAA has been closely monitoring the Optional Desktops Audits and cataloguing process and TAAMT system improvements. All improvements are ranked based on priority to allow Elexon to focus resource on improvements that give the highest return to our audit Participants. Additional improvements identified by the TAMEG will be catalogued and prioritised.

Process Improvements

3.3   Elexon and the TAA have identified two major 'pain points' with Desktop Audits, for which process improvements are required. The process improvements will address:

- B.3X The non-receipt of Single Line Diagrams (SLDs); and
- A.6 Mismatch of Settlement Data.

3.4   In order to address the failure to submit SLDs in 100% of occasions, Elexon will be amending the requirements so that generic drawings may be submitted for Low Voltage (LV) sites, yet site specific SLDs will still be expected for High Voltage (HV) sites. The decision to amend the LV requirement was made following feedback from Participants, which indicated that only generic drawings were held for LV Metering Systems.

3.5   Category A[2] non-compliances for mismatch of Settlement data will no longer be assigned where a Participant has provided data in different formats, time-periods, or units. We also invite feedback from the TAMEG as to where the guidance could be clearer with respects to Settlement data submission, as all Participants appear to have struggled.

System Improvements

3.6   Elexon and the TAA have identified a number of TAAMT back-end system changes, which will improve the overall usability and streamline the customer interaction with the Desktop Audit process. However, no system changes have been identified that are critical and do not prevent the Desktop Audit process from being used for different sample types.

BSC Party Support

3.7   Following the initial review and feedback from the TAMEG, Elexon will be updating the Desktop Audit guidance notes and local working instructions. The updates will look to address areas where users have struggled with the process, in order to provide additional support.

3.8   Furthermore, Elexon and the TAA will be hosting question and answer sessions with Supplier, Half Hourly Meter Operator Agent (HHMOA), Half Hourly Data Collector (HHDC) and Licenced Distribution System Operator (LDSO) TAAMT users. These sessions will be used to draw out feedback and identify further improvements. The findings from these sessions will also be used to produce frequently answered questions documents that will be made available on the Elexon website.

Desktop Audit Findings

3.9   Whilst complete findings will not be available until the conclusion of the Specific Sample (expected December 2020), the preliminary findings have allowed us to quantify the quality and availability of records held for Measurement Class E Metering Systems.

3.10   It has historically been acknowledged that record retention and quality is likely to be poor for the Measurement Class E Meter population, primarily due to the Metering System migration Non Half Hourly Settlement to Half Hourly Settlement following P272[3]. However, as the Specific Sample has focused on Meters Systems energised post-P283[4] the findings indicate that poor record retention has persisted the post-P272 migration for new Metering System.

3.11   Commissioning remains the primary control for ensuring that Metering Equipment has been installed correctly and to provide assurance against Elexon focus Risk 003[5]. As such, it is concerning that the HHMOA

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[2] Category A – A non-compliance has been identified from an Desktop Audit, which is deemed to be currently affecting, or has a high likelihood of affecting, the quality of data for Settlement purposes
[3] P272 – Mandatory Half Hourly Settlement for Profile Classes 5-8
[4] P283 – Reinforcing the Commissioning of Metering Equipment Processes
[5] Risk 003 – Metering Equipment installation, programming, maintenance and Commissioning

Commissioning (part 2) records are missing in 82% of Desktop Audits, whilst LDSO Commissioning (part 1) records are missing in 55% of Desktop Audits.

4. Recommendations

4.1   We invite the TAMEG to:

a) **NOTE** the TAAMT2 update;

b) **COMMENT** on the prototype TAMEG stats report; and

c) **COMMENT** on the Desktop Audit System and Process updates.

For more information, please contact:

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