

## TAMEG 51 Stats Report

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Summary **This paper provides a summary of the outcomes of the Technical Assurance Agent (TAA) Audit for the current Audit Year to date, along with Elexon's key insights from the data obtained so far.**

### 1. Background

- 1.1 TAMEG members have observed that discussion of the TAMEG stats at recent meetings has become increasingly circular, with little in the way of clearly defined outcomes for how associated process can be improved. For these reasons, Elexon has changed how the data is presented.
- 1.2 Engagement statistics and Non-compliance rates for Audit Years 2015-2016 through to 2022-2023 (to date) are now included in Attachment A, whilst particular insights and suggestions for further action are presented in the main body of the paper for discussion during the meeting.
- 1.3 For this paper, these concern two areas:
- Engagement (covering Confirmation, Cancellation and No Access rates, and Non-provision of data); and
  - Commissioning.

### 2. Engagement

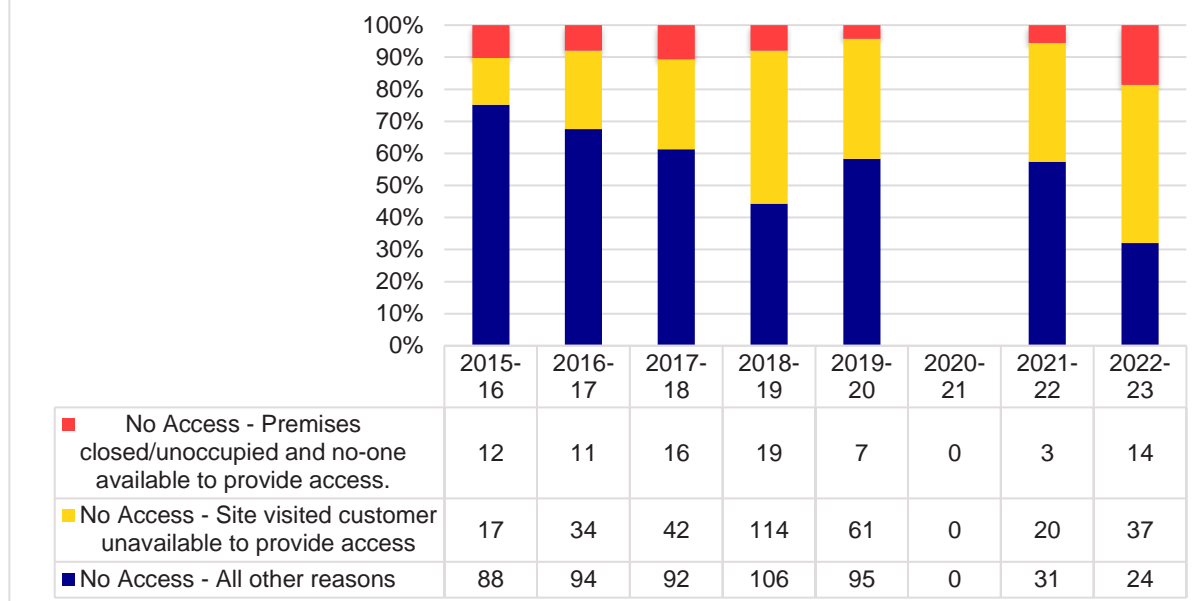
#### Supplier Volume Allocation (SVA) Main Sample Site Visits

- 2.1 The Cancellation rate for the SVA Main Sample has returned to similar figures as pre-Covid following an increase in 2021-2022. However, the No Access rate over the last four Audit periods has increased by 2.43%.

Audit Period	Cancellations	No Access Rates
2019-2020	5.31%	13.73%
2020-2021	100.00%	N/A
2021-2022	8.62%	14.10%
2022-2023	5.82%	16.16%

- 2.2 As can be seen from the graph below, current No Access rates are overwhelmingly the result of premises being closed or customers being unavailable to provide access.

## SVA Main Sample - Reasons for No Access



### Central Volume Allocation (CVA) Site Visits

- 2.3 For the 2021/2022 Audit year the level of Accepted Audits fell, this was due to a single CVA Meter Operator Agent (MOA) not being able to fulfil an increased number of audits. The MOA advised this was due to the backlog of Metering work that had built up during the 2020 Covid-19 pandemic. The current Audit year has seen an improvement with these figures and the acceptance rate has risen back to similar numbers.

Audit Period	Accepted Audits
2019-2020	96.70%
2020-2021	92.41%
2021-2022	79.71%,
2022-2023	93.75%.

### SVA Desktop Audits

- 2.4 The figure of Unconfirmed Audits increased for the Audit period 2021-2022 and again for the current Audit Year.

Audit Period	Unconfirmed Audits
2019-2020	Desktop Audits not yet started
2020-2021	7.26%
2021-2022	14.84%
2022-2023	37.82%

- 2.5 These low rates of engagement are reflected in the consistently high number of Category B<sup>1</sup> Non-compliances, all of which record a failure to provided required documentation for a Desktop Audit.

Audit Period	Mean Number of Category B Non-Compliances per Audit
2019-2020	Desktop Audits not yet started
2020-2021	6.24
2021-2022	5.83
2022-2023	5.75

## 3. Proposals to improve overall participant engagement

<sup>1</sup> Category B Non-compliance - A non-compliance has been identified from a Desktop Audit, which has been deemed to have a lower likelihood of affecting the quality of data for Settlement purposes, or for the non-provision of evidence

- 3.1 Elexon reached out to the Operational Support Managers (OSMs) for all Suppliers that had received at least one Category A.1X Non-compliance<sup>2</sup> to gather further information as to why this had occurred.
- 3.2 The OSM provided information from the responses and there are some reoccurring key issues that have been raised from the Suppliers:
- Outdated contact information held within the Technical Assurance Agent Management Tool (TAAMT);
  - Lack of user knowledge for the TAAMT; and
  - Failure to reassign an Audit to the new Supplier following a Change of Supply (CoS) event
- 3.3 Accordingly, Elexon proposes several steps to improve customer engagement.
- 3.4 These include beginning an ongoing project to ensure that all participants in the Audit receive reminders to keep contact information up to date. This information will then be shared with the TAA to ensure that this information is updated within the TAAMT.
- 3.5 Automated communications from the TAAMT will also be revised in line with User Experience feedback sessions by Elexon held in February 2022, emphasising where additional guidance is available and providing contact details for participant queries. Appendix A provides an example of the changes to the notification that will be deployed into the TAAMT in the near future.
- 3.6 To improve overall engagement and understanding of the TAM processes and expectations, Elexon will be reintroducing an annual TAM day. This will be a day where participants will be able to receive further training on the TAM resources, process and gain access to further technical advice around Metering Equipment. Elexon propose to host this day during February or March 2023 so that this knowledge is retained and ready for the start of the following Audit year (April 2023).
- 3.7 For the CoS process, this requires further investigation as currently if a Meter System Identifier (MSID) changes Supplier once the Audit request has been sent, there is no way to cancel this request and this will be logged as a 'failed to confirm'. This has been added to the backlog of improvements to the TAAMT as part of the ongoing project to improve User Experience.

#### 4. Commissioning

- 4.1 Levels of Non-compliance relating to Commissioning have remained consistent despite significant efforts by both Elexon and the industry to improve processes in this area.
- 4.2 In an effort to better understand why this might be the case, Elexon has explored several additional ways of interrogating the available data around Commissioning Non-Compliance, including:
- a) Comparing the proportion of audits in which each participant was involved with the instance of relevant Non-compliances, to establish if particular participants were performing better or worse than average, and cross-referencing the outcomes against open BSC Audit Issues for the Commissioning process;
  - b) Comparing the instance of relevant Non-compliances with the installation date of the Metering System; and
  - c) Comparing the instance of relevant Non-compliances for meters that had undergone a change of MOA.
- 4.3 Elexon did not find any significant correlation between the results of the TAA and BSC Audits. However, the second two comparisons showed a clear improvement in the provision of Commissioning records following a change of Meter Operator Agent (MOA) for meters installed following the introduction of CP1497<sup>3</sup>.

Row Labels	Pre-CP1497, No Change in MOA	Pre-CP1497, Change in MOA	Post-CP1497, No Change in MOA	Post-CP1497, Change in MOA
Commissioning records compliant	58.33%	44.30%	52.75%	58.96%

<sup>2</sup> A.1X – Failure to Confirm Desktop Audit

<sup>3</sup> [CP1497: Commissioning information data flows for HHMOAs](#)

Commissioning records incomplete, incorrect or suspect	7.41%	1.27%	11.44%	4.48%
Commissioning records not provided	34.26%	54.43%	35.81%	36.57%

- 4.4 As can be seen from the elements highlighted red in the table, prior to CP1497 Commissioning records were significantly more likely not to be provided for Metering Systems that had been through a change of MOA. After the implementation of CP1497, this difference essentially disappears.
- 4.5 As noted above, Elexon continues to experience difficulties in obtaining required documentation through the Desktop Audit process. It is possible that, once these have been addressed, we will see further improvement.
- 4.6 This work highlights some important aspects of the TAA Audit Data in general that should be kept in mind when Elexon presents analyses in future (for example in the response to the TAA Annual Report).
- In particular:
- a) Reducing overall rates of any given TAA Non-compliance is likely to require more than one solution, as TAA Non-compliances involve complex processes operated between more than one market participant that can break down in various ways and for different reasons; and
  - b) It is likely to take some time before improvements in Metering processes filter through into the Metering population to an extent where they become fully visible in the Audit sample.
- 4.7 Elexon welcomes any additional suggestions from the TAA as to additional information that could be considered in order to perform similar analyses of other Non-compliances.

## 5. Recommendations

- 5.1 We invite you to:
- a) **NOTE** the contents of the TAMEG Stats Report;
  - b) **COMMENT** on Elexon's plans to increase engagement with the TAA Audit through improvements to automated communications from the TAAMT system, and through holding a TAM day in February or March 2023; and
  - c) **COMMENT** on Elexon's analysis of Commissioning Non-compliances in relation to the installation date of meters and changes of MOA.

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## Appendices

Appendix 1 – Example of proposed changes to TAAMT Notification e-mails.

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## Attachments

Attachment A – TAMEG Stats Report Data Tables.

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### For more information, please contact:

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## Appendix 1 – Example of proposed changes to TAAMT Notification e-mails

<p>Dear {FIRSTNAME},</p> <p>We are arranging an inspection, visit reference {VISIT_REF} for MSID {MSID} on {INSPECTIONDATE} at {INSPECTIONTIME}.</p> <p>Address: {ADDRESS}.</p> <p>Using TAA interactive website, please will you provide the information that is requested at least 5 working days prior to the visit. You can navigate directly to the website by clicking here.</p> <p>In order to reduce the costs to the industry of aborted site visits, as part of your process for arranging access to the site for the inspection we recommend that you ask the appointed Half Hourly Data Collector to confirm whether the site appears to be occupied or not based on the pattern of consumption or generation being recorded by the Settlement Meters at the site. If it appears that the site is unoccupied and you are also having trouble contacting the customer/company by phone and/or letter, please provide this evidence to the TAA to consider. The TAA will either try to re-schedule the visit or select a replacement site for inspection.</p> <p>Please note that you are no longer required to provide Meter Technical Details to the TAA; however, if you wish for these to be audited please feel free to provide them. No non-compliances will be raised against any MTDs provided by a Supplier/Registrant. Instead, you will receive a note to indicate where any non-compliance exists.</p> <p>Best Regards, TAA Administrator</p>	<p>Dear Recipient Name</p> <p>MSID xxxxxxxxxx at 350 Euston Road, London NW1 XXX has been selected for Technical Assurance Agent (TAA) Site Inspection on 07/09/2022 at 00:00. The inspection reference is 2022-0001.</p> <p>Please confirm the inspection by using the <a href="#">Technical Assurance Agent Management Tool (TAAMT)</a> to provide all the required information no later than <b>[{INSPECTIONDATE}-10WD]</b>.</p> <p><b>Arranging access</b> We recommend that you ask the appointed Half Hourly Data Collector to confirm whether the site appears to be occupied based on the pattern of consumption or generation being recorded by the Settlement Meters at the site.</p> <p><b>Unoccupied sites</b> If it appears that the site is unoccupied or if you are having trouble contacting the customer <b>please provide evidence</b> of this so that we can consider re-scheduling or selecting an alternative site for inspection.</p> <p><b>High Voltage Supply (HV)/remote measurement transformers</b> If the Supply is High Voltage (HV) or if the measurement transformers are remote please ensure you <b>contact the relevant Licensed Distribution System Operator (LDSO)</b> to arrange for a representative to be on site during the inspection to provide access.</p> <p><b>Further information</b> Please contact [TAA Admin] if you have any queries about this Inspection Visit.</p> <p>If you require training on the TAA Audit process, including use of the TAAMT tool, please contact your Elexon OSM or <a href="mailto:tametering@elexon.co.uk">tametering@elexon.co.uk</a>.</p> <p>You can find out more about the <a href="#">TAA Audit on the BSC website</a>.</p> <p>Kind regards</p> <p>TAA Administrator</p>
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