

UMSUG paper – Review of Charge Code and Switch Regime Spreadsheets

1. Introduction

The Charge Code and Switch Regime Spreadsheets contain historical data that is no longer relevant for settlement purposes. This paper proposes a review of that data in order to streamline the spreadsheets. It is anticipated that such a review may have the benefit of revealing any invalid data for correction.

2. Rationale

Over the past few months the author has noted emails from UMSUG members requesting correction of errors and removal of duplications within the above spreadsheets. It has been noted that where errors have been corrected or entries end dated, these entries are “greyed out”. Entries that have been superseded by new data, e.g. burn hours review and load research are also shaded in the same way.

It has also been mentioned that such errors cause difficulties if users try to load this data into their unmetered systems.

There may be other issues that UMSOs and other stakeholders encounter when using the spreadsheets, it is hoped that this paper may flush them out.

3. Example Issues

3.1 Switch Regime Spreadsheet

Examples from the Switch Regime spreadsheet are shown below;

Regim	Period	Switch		Statu	Default Switch		Effective		
		Off	Class		Regim	GMT/ CLK	From Date	Date	
811	Electronic PEC 55/28		P	C	205			01/04/1996	05/10/2010
811	Electronic PEC 55/28		P	C	205			05/10/2010	05/04/2011
811	Electronic PEC 55/28		P	B	P	204	GMT	19/02/2020	
812	Electronic PEC 55/55		P	C	205			01/04/1996	05/10/2010
812	Electronic PEC 55/55		P	C	205			05/10/2010	05/04/2011
812	Electronic PEC 55/55		P	B	P	206	GMT	05/04/2011	
813	Electronic PEC 55/83		P	C	205			01/04/1996	05/10/2010
813	Electronic PEC 55/83		P	C	205			05/10/2010	05/04/2011
813	Electronic PEC 55/83		P	B	P	208	GMT	05/04/2011	
821	Electronic PEC 70/35		P	C	205			01/04/1996	05/10/2010
821	Electronic PEC 70/35		P	C	205			05/10/2010	05/04/2011
821	Electronic PEC 70/35		P	B	P	206	GMT	05/04/2011	
822	Electronic PEC 70/70		P	C	205			01/04/1996	05/10/2010
822	Electronic PEC 70/70		P	C	205			05/10/2010	05/04/2011
822	Electronic PEC 70/70		P	B	P	208	GMT	05/04/2011	
823	Electronic PEC 70/135		P	C	205			01/04/1996	05/10/2010
823	Electronic PEC 70/135		P	C	205			05/10/2010	05/04/2011
823	Electronic PEC 70/135		P	B	P	207	GMT	05/04/2011	

For each of these regimes there are three entries, two of which have been end dated in 2010 and 2011 respectively. PSL100 requires data used in the calculation of settlement data to be retained for a period of 40 months. The first two entries therefore no longer have any relevance and could be deleted from the spreadsheet.

However, it is appreciated that in some cases UMSOs may have calculated EACs based on old data and because the customer has not submitted a changed inventory in the last 40 months, the EAC may not have been recalculated using current data. In this case the UMSO may require the old data to support the EAC calculation.

3.2 Charge Code Spreadsheet

3.2.1 The Charge Code Spreadsheet contains three columns that no longer serve any function and could be deleted, these are:

- Old Charge Code – Suggest all customers should be using 13 digit codes by now.
- Status – The main entries are “T”, “P” or blank. These relate to the old Charge Code approval process, where Charge Codes were Temporary or Permanent. There are also entries that should be in the Amendment Notes column.
- Standard/Non Standard Conversion – This relates to the migration from 7 to 13 digit codes and is no longer relevant.

3.2.2 The extract below from the Charge Code Spreadsheet contains multiple entries for the same Charge Code where changes have been made to the values.

New Charge Code	Circuit Watts	Circuit VA	Circuit VAR	Circuit Power Factor	Dimmed Circuit Watts	Dimmed Circuit VA	Dimmed Circuit VAR	Dimmed Power Factor	Status	Date Issued	Effective To Date
11 0090 2000 100	104	120	60	0.87					Superseded by 11 0090 2000 100	01/06/2005	31/03/2012
11 0090 3000 100	72	73	12	0.99					P	30/08/2011	
11 0135 1000 100	190	224	119	0.85					P	01/04/2012	
11 0135 1000 100	175	206	109	0.85					Superseded by 11 0135 1000 100	01/06/2005	31/03/2012
11 0135 2000 100	178	209	110	0.85					P	01/04/2012	
11 0135 2000 100	159	168	54	0.95					Superseded by 11 0135 2000 100	01/06/2005	31/03/2012
11 0180 1000 100	246	270	111	0.91					P	01/04/2013	
11 0180 1000 100	223	245	101	0.91					P	01/06/2005	31/03/2013
11 0180 2000 100	223	245	101	0.91					P	01/06/2005	
12 0018 4000 100	30	36	20	0.83					P	01/04/2014	
12 0018 4000 100	25	30	17	0.83					P	01/06/2005	31/03/2014
12 0026 1000 100	59	73	43	0.81					P	01/06/2005	
12 0026 1000 100	59	73	43	0.81					P	01/06/2005	19/08/2014
12 0026 2000 100	41	42	9	0.98					P	01/06/2005	
12 0026 2000 100	41	42	9	0.98					P	01/06/2005	19/08/2014
12 0026 4000 100	33	38	19	0.87					P	01/06/2005	
12 0026 4000 100	33	38	19	0.87					P	01/06/2005	19/08/2014
12 0036 1000 100	70	88	53	0.8					P	01/04/2014	
12 0036 1000 100	67	84	51	0.8					P	01/06/2005	31/03/2014
12 0036 2000 100	54	58	21	0.93					P	01/04/2014	
12 0036 2000 100	51	55	21	0.93					P	01/06/2005	31/03/2014
12 0036 3000 100	41	41	0	1					P	01/04/2014	
12 0036 3000 100	38	38	0	1					P	01/06/2005	31/03/2014
12 0036 4000 100	48	52	20	0.92					P	01/04/2014	
12 0036 4000 100	45	49	19	0.92					P	01/06/2005	31/03/2014
12 0066 1000 100	115	120	34	0.96					P	01/04/2014	
12 0066 1000 100	104	108	29	0.96					P	01/06/2005	31/03/2014

As with the Switch Regime Spreadsheet, UMSOs may wish to retain this end dated data to support EAC calculations.

3.2.3 Some Charge Codes have multiple ranges to identify equipment. For example CCTV has three ranges in use – 7932, 854, 870, the current range is 870 whilst 7932 and 854 are discontinued. 7932 still has a few live codes in the Charge Code spreadsheet, whilst 854 has none listed but there are a few UMSO miscellaneous codes in use. It is suggested all of these could be amalgamated into the 870 range.

There are probably other areas where codes could be amalgamated, again for example, comms equipment appearing both in the 79 traffic signal range and the miscellaneous coding.

4. Recommendation

The UMSUG is invited to:

- Appoint a small working group to carry out a thorough review of the spreadsheets to identify errors and invalid data needing correction in the Operational Spreadsheets and report back at the next UMSUG meeting.

- Approve removal of the Old Charge Code, Status, and Standard/Non Standard Conversion columns from the Operational Charge Code Spreadsheet.
- Consider whether historical data can be deleted from the spreadsheet in line with the PSL100 data retention requirements or if an alternative timescale is appropriate.
- Highlight to the working group any further improvements that could be made to the Operational Spreadsheets.

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