



# EES USER GUIDE

## For Supplier Users

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## Change History:

Version Number	Status	Date of Issue	Reason for Change
1.2	Issued	21/11/2019	Previous version finalised and issued
1.3	Issued	16/06/2020	Crossed Meters functionality. Updated document from page 22. (D.E)
1.4	Draft	16/10/2020	Change history added to document. Changes as per November 2020 release of ECOES (v6.1) and detailed updates to entire document. Passed to K.H for initial review. (D.E)
1.4	Draft	29/10/2020	Reviewed (K.H) Passed to A.B for final review (D.E)
1.4	Issued	30/10/2020	Issued as per ECOES release 6.1. (A.B)
1.5	Draft	29/01/2021	Changes as per February 2021 release of ECOES (v6.2). Passed to K.H for initial review. (D.E)
1.5	Draft	02/02/2021	Reviewed (K.H) Passed to A.B for final review (D.E)
1.5	Issued	05/02/2021	Issued as per ECOES release 6.2. (A.B)
2.0	Issued	01/09/2021	Alignment with move of governance to the Retail Energy Code.
2.1	Draft	08/12/2021	Added search limits
2.2	Draft	01/03/2022	Updating with CSS changes (REL address related functionality) and added the Industry Role Terminology table.
3.0	Issued	15/05/2022	Updated to reflect RECv3 changes, including provision of new data (e.g. REL). In particular: 1) addition of four new paragraphs at end of Primary Search section on page 7, 2) new sections "MPL Search Result Display" and MPL and REL Search Result Display" on page 8, 3) new text added to "Display & Search Settings" on page 11 and 4) new sections "MPAN Details CSS Data", "CSS Switching Summary", "CSS Switching Messages", Cancelled Registration Synchronisation Messages", and "Retail Energy Location Details" on pages 19 to 21. Other minor changes.
3.1	Draft	02/03/2023	Updates following R22 Data Access Matrix implementation

## Circulation:

Version Number	Reason for Issue
2.0	Finalised for RECv2 commencement on 01 Sept 2021.
3.0	Finalised for RECv3 commencement on 18 July 2022.
3.1	

## Industry Role Terminology:

The below table outlines industry roles referenced in this document where the REC name differs.

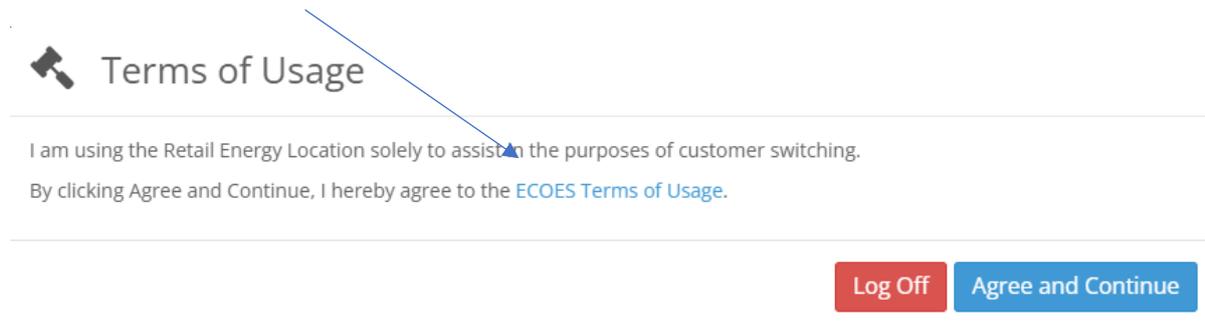
ECOES Role	REC Equivalent (where different)
Distributor	Distribution Network Operator (DNO)
Meter Operator (MOP)	Metering Equipment Manager (MEM) or more specifically Meter Operator Agent (MOA)
Agent	Supplier Agent, i.e. Data Aggregator, Data Collector, Metering Equipment Manager

For the avoidance of doubt, the Electricity Enquiry Service (EES) is the name used for the service in the REC. ECOES is the system used to deliver the EES. These terms are used interchangeably in this document.

## Login to ECOES

Users should open the ECOES web browser <https://www.ecoes.co.uk/> and enter in their Username and Password. Then click 'Log on'.

All users of ECOES must agree to the Terms of Usage of the system upon each session login. When logging in, users will be presented with a session login screen that requires them to positively confirm that they agree to the Terms of Usage of ECOES (as defined and visible when clicking on the blue 'ECOES Terms of Usage'.



The User will have the option at this point, to log off (if they disagree with the terms of use) or agree and continue (if they agree to the terms of use).

Opting to agree and continue indicates that the user is accessing ECOES for the purpose of aiding customer switching and is therefore entitled to view REL data items and access the REL searching functionality.

## Forgotten Password

If a user forgets their login password then they must reset it themselves, or where they do not have permission to do so, request that service from a person with appropriate permissions within their organisation. It is not the role of the ECOES Technical Service Desk or the REC Code Manager to reset passwords.

### 1.1 Resetting another user's password

A user with either the 'User Maintenance' or 'Reset Passwords and Delete Users' system function can reset another user's password. This can be performed by going to the Admin menu then selecting Users. When you have searched for and selected the required user, there is a button that says Reset Password.

### 1.2 Resetting your own password

Below are several scenarios in which a user requires their password reset and the methods they can employ to do this:

#### Email Address Users

- A user has forgotten their password.

A user can initiate a password reset via the login screen by clicking on the 'Forgot your password?' link. On completion an email will be sent to their email address containing a link allowing them to enter a new password.

- A user knows their password but would like to reset it anyway.

A user can initiate a password reset via the 'Change Password' button on the 'My Account' screen. On clicking 'Change Password' button an email will be sent to their email address containing a link allowing them to enter a new password.

- A user's password has expired.

Should a user's password expire between them logging out and next logging in, a popup will be displayed the next time they log in with their expired password. On clicking the 'Reset Password' button an email will be sent to their email address containing a link allowing them to enter a new password.

#### Traditional Username Users

- A user has forgotten their password.

A user can initiate a password reset via the login screen by clicking on the 'Forgot your password?' link. On clicking the link, a popup is displayed whereby the user must correctly answer their memorable questions. If answered correctly a user may reset their password.

- A user knows their password but would like to reset it anyway.

A user can initiate a password reset via the 'Change Password' button on the 'My Account' screen. In order to change their password via this screen they must know their current password.

- A user's password has expired.

On logging in the user will be informed of the password expiry and prompted to enter a new password.

#### Proxy Email Address Users

- A user has forgotten their password

The user can initiate a password reset from the login screen, in this instance an email containing a new password will be sent to the proxy email address saved against that user. The password can then be communicated to the intended user outside of the ECOES system.

- A user knows their password but would like to reset it anyway

The user can request a password reset from the 'My Account' screen. This will send an email to assigned proxy email address containing a new password. The password can then be communicated to the user outside of the ECOES system.

- A user's password has expired

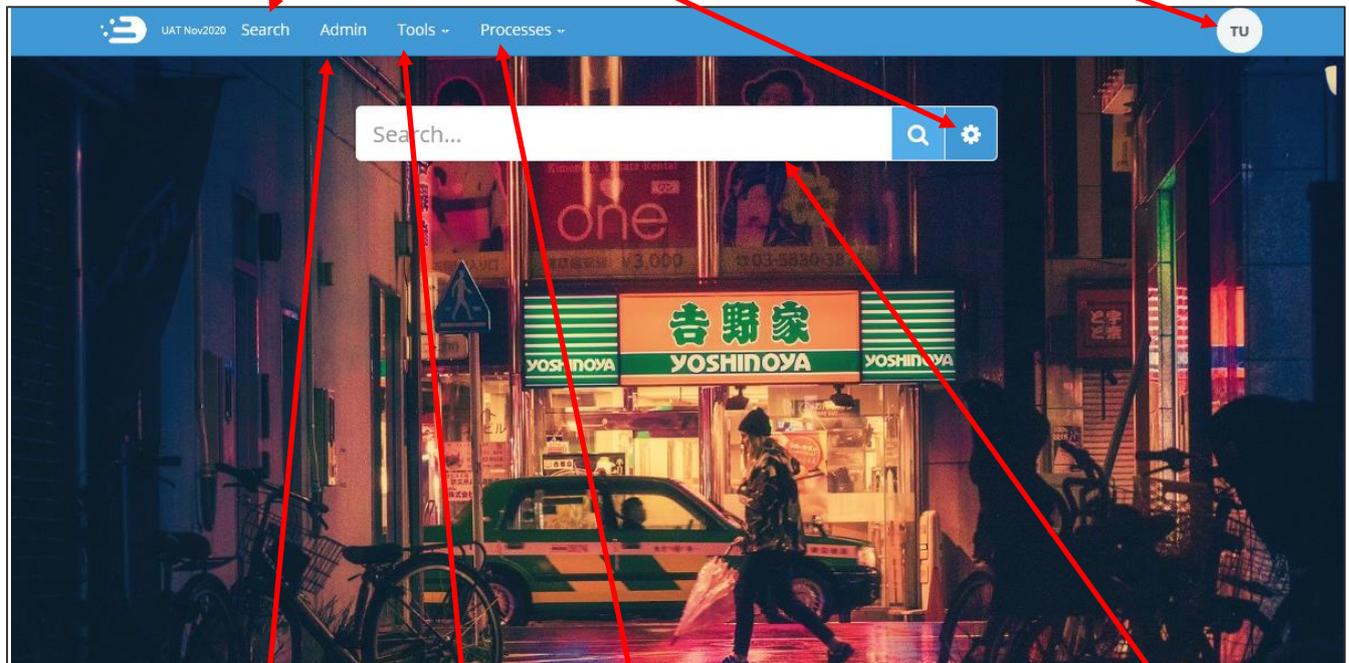
On logging in the user will be informed of the password expiry and prompted to enter a new password.

## Primary Search

Search/Homepage – clicking this will take the user back to the ECOES Homepage

My Settings – this dropdown will allow the user to access their display settings – find out more [here.](#)

My Details – this dropdown will allow the user to access their account details – find out more [here.](#)



Admin – this screen will show details of the users' company group (e.g. who the MAU is). Users who have user management privileges will be able to reset passwords and create users from this page – find out more [here.](#)

Tools – Allows Users with relevant permissions to access PPMIP Exemptions, NDC MPAN Authorisation, Report Downloads and User Reports.

Processes – Allows Users with relevant permissions to access certain process within ECOES (Secure Communications, Crossed Meters and MPAN Requests).

Search field: in ECOES this is a 'Universal Search' function (similar to internet search engines). Users will be able to search for addresses, partial addresses, postcodes, MPANs, MSNs, multiple MPANs, multiple addresses or a combination.

Search results are limited to 200 results; if a search exceeds this the user will be required to refine their search.

By default, all users will be limited to a maximum of 600 searches per day. Once this limit is reached, access to view data will be removed for the remainder of that day. This limit will be configurable at company group level.

When searching, there are two possible address sources that can be queried. These are: Meter Point Location (MPL) addresses and Retail Energy Location (REL) addresses.

If a search term includes an MPAN or MSN, only MPL address data will be queried and returned.

If a search term consists of postcodes and address fragments only, both MPL and REL address data will be queried and returned.

A user can indicate that they are not searching to aid with customer switching, and do not wish for REL data to be queried, by toggling the Using For Switching control, as detailed in this document under Display & Search Settings.

When searching both MPL and REL address data, ECOES will combine the results of each query. If an address search matches on a MPL address but not a REL address, the REL addresses will be returned for all MPANs within the MPL match. Likewise, if an address search matches on REL addresses only, the MPL address for the matched MPANs will also be returned.

### MPL Search Result Display

When querying only against MPL address data, results will be displayed as below. An individual record is returned for each MPAN, consisting of a top row containing the MPL address and a second row containing MPAN data.

39 MPL Address Line, CITY, ABC 123						
MPAN: 0123456789123	GSP Group: _F (Northern)	Status: Traded	Distributor: Power Distribution			

### MPL & REL Search Result Display

When querying both MPL and REL address data, results will be displayed as below. Results are still grouped by MPAN, with a top row displaying the MPL address and a second row containing MPAN data, but additional rows will be present beneath this listing the REL addresses for that MPAN.

Though an MPAN will only have one MPL address it may have 0, 1 or multiple REL addresses.

1 MPL ADDRESS LINE, CITY, ABC 123						
MPAN: 0123456789123	GSP Group: _F (Northern)	Status: Traded	Distributor: Power Distribution			
REL: 1 REL ADDRESS LINE, CITY, ABC 123	Address Type: DPA	Confidence Score: 100	UPRN: 000000000801			

If the 'Display REL Addresses' control is turned off, the REL address information will not be displayed within the users search results.

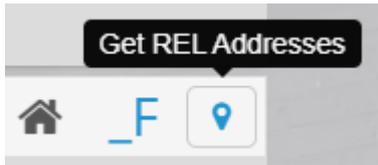
Property Display Options

<input checked="" type="checkbox"/>	Detail View	
<input type="checkbox"/>	Simple View	
<input checked="" type="checkbox"/>	Display REL Addresses	

Below is an example of a search result with the Display REL Addresses control unticked.

39 MPL Address Line, CITY, ABC 123								
MPAN: 0123456789123	GSP Group: _F (Northern)	Status: Traded	Distributor: Power Distribution					

With Display REL Addresses unticked, a user can still view the REL address information for an individual search result by clicking the Get REL Address button within the search result. Clicking this button will display the REL data for that MPAN only.



If an MPAN has been returned due to a match on a REL address, but did not match on the MPL address, this will be highlighted by the green map marker icon.



## My Account

Users can manage their user account details via the 'My Account' page found by hovering their mouse over the circular icon in the top right of the ECOES page. This is also where a user can logout. A user can perform the following tasks in this page:

Amend Account Information.

Reset their password.

Amend their memorable questions/answers (for password resets).

View remaining MPAN Views for that day.

Change the background colour of ECOES.

## Icon Identification

	Energised		Disconnected		Industrial and Commercial		Domestic Indicator		Non-Domestic
	Search		No MPAN Designation		Unmetered Supply		GSP Group		Filter
	Green Deal		New		Registered		De-Energised		Related MTC
	Export LLFC		Smart Communications		Pending Registration Currently Under Objection		Geographical Representation of GSP Group		MPAN History
	Metered Indicator		Domestic Designation		Contact Details		MPAN Relationships		Back to Results
	Reject NDC MPAN Request		Accept NDC MPAN Request		Export/Download		Add a User (available to Admin/MAU only)		Current Meter
	Meter History Search		User Reports						

## Market Sector Indicators

When viewing an MPANs, an indicator will be present to reflect the Market Sector of that MPAN (as defined in the Icon Identification above.) In the example below, the MPAN is domestic and energised.

	MPAN 190	
Trading Status	Traded	
RMP Status	Operational	
Distributor	SEEB (UK Power Networks)	
GSP Group	J (South Eastern)	
Line Loss Factor Class		

		
	Domestic Indicator	

## Display & Search Settings

Retail Energy Location

Using For Switching

Postcard Menu Position

Horizontal

Vertical

Hidden

Property Display Options

Detail View

Simple View

Display REL Addresses

Miscellaneous Options

Postcard Flipper

Random Background

A user can choose how they view data within ECOES. To open the settings options, click on the settings icon, found to the right of search box (⚙️).

You can choose where 'Postcards' are positioned, whether to hide postcards, or to allow the postcard to 'flip' or not - a flipping postcard will show additional information when a mouse is hovered over it. A user can choose to remove 'random background' which is also pre-set.

A user can also decide whether to see a 'Detailed' or 'Simple' view - the simple view will remove the dates related to some data items allowing more information to be shown on one screen without having to scroll.

A user can indicate whether they are searching to aid with customer switching by toggling the Using For Switching control. When ticked, an address search will query Retail Energy Location (REL) address data. When unticked, an address search will query Meter Point Location (MPL) address data only.

A search that queries REL data will display both REL addresses and the MPL addresses on the search results screen. If a user does not wish for the REL addresses to be displayed, they can untick the Display REL Addresses control.

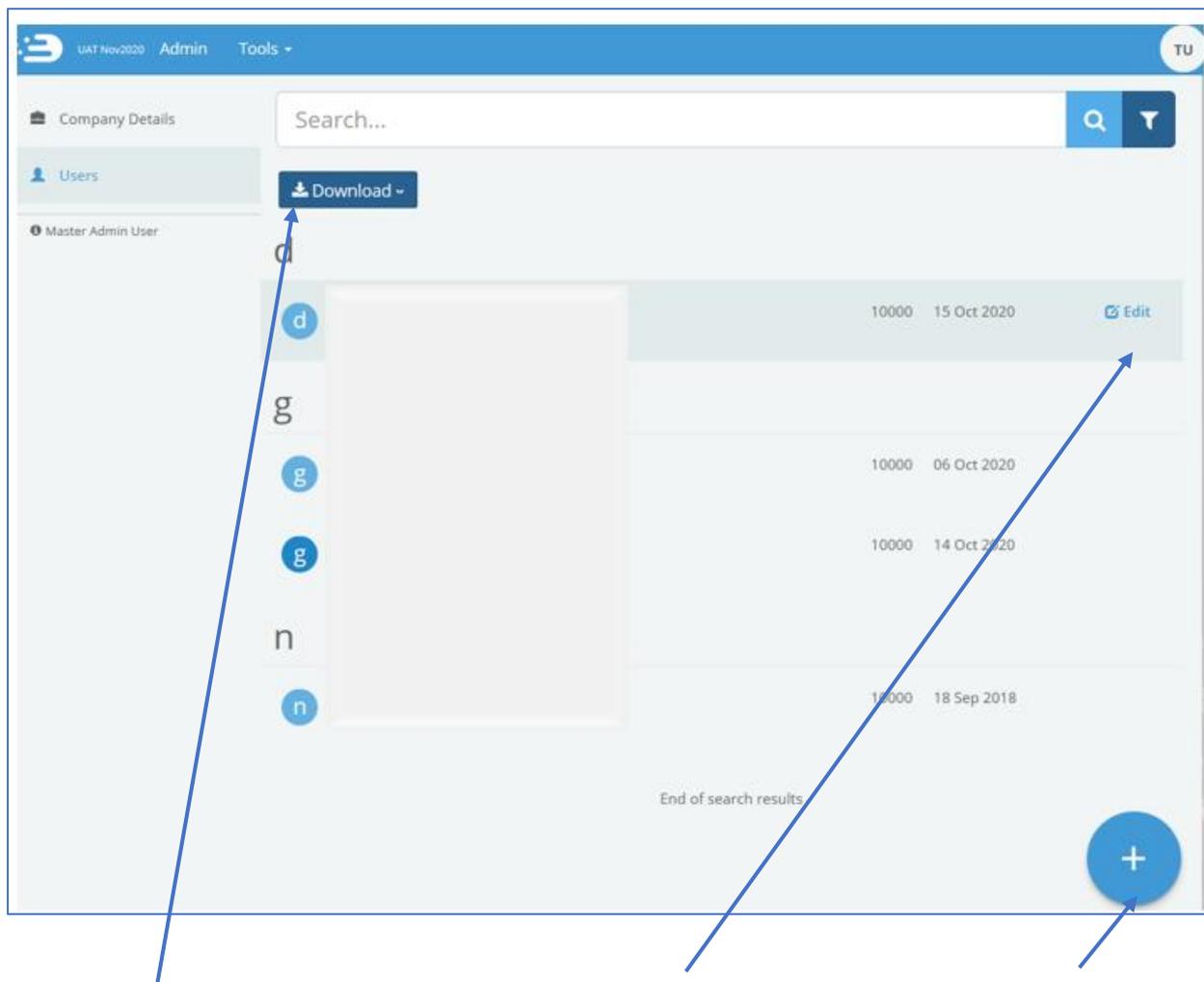
A search containing an MPAN or MSN will not query REL data and will never display REL address data on the search results screen, regardless of the Display REL Addresses setting.

## Managing Email Domains – Only available to the MAU

Email domains are a security feature for ECOES organisations to ensure only valid Username/Email Addresses are used. An organisation can have **multiple email domains or none**. Whenever a new user is being created, and the organisation has a domain(s) setup, the username will only be able to have a valid email domain.

## Managing Users – Only available to relevant users (MAU and User Admin roles)

Clicking on the Users option on the left of the Admin page will show users with relevant privileges all the users within their organisation. This is also where 'User' Reports can be found.



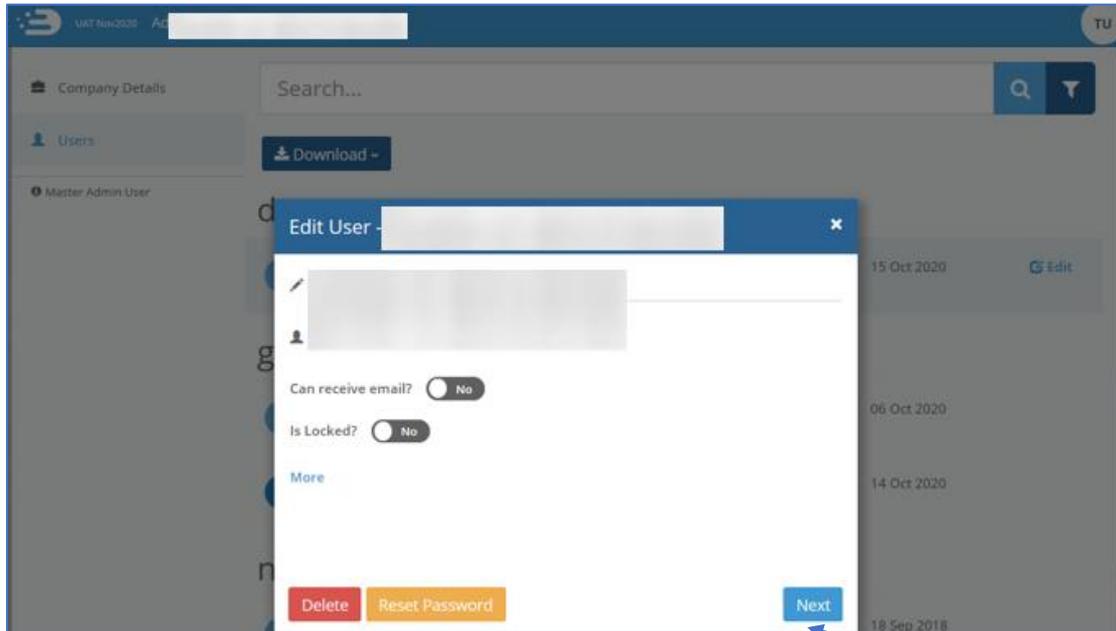
Clicking 'Download' will allow MAU and Admin users to download all the users of a company group into a report containing user details e.g. last login date.

Clicking on the 'Edit' button when hovering over a specific user will open the user's profile. The MAU can unlock user accounts, reset a user's password, delete a user, amend user account information and [grant/revoke access to certain ECOES functions.](#)

To create a new user, click on the 'Plus' icon. This will open a blank user profile, identical to the way that edit user is displayed.

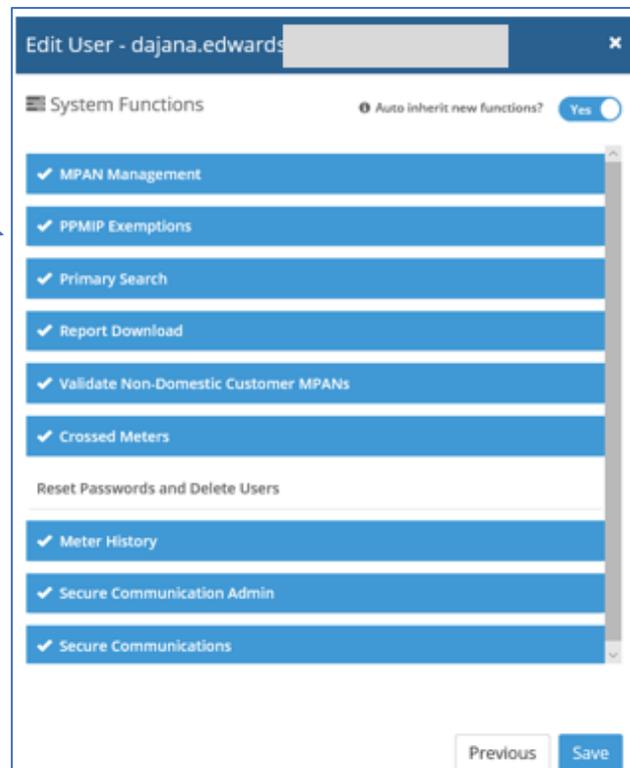
## Amending User Roles

Users with the relevant privileges (MAU and User Admin Roles) can amend what functions other users within their company group have access to. To do this open a user account within <https://www.ecoes.co.uk/Admin/User> by clicking on 'Edit' within that users line:



To view and amend what system functions a user has access to click on the 'Next' button.

This page lists what functions are available to each user. Here you can tick/untick as applicable. A blue highlight, with a white tick alongside it indicates functions that have been selected.

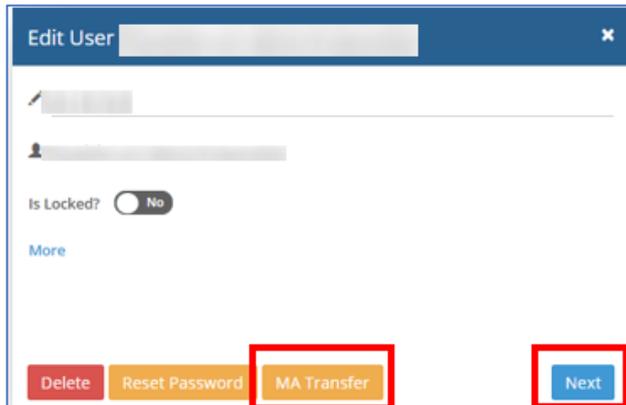


Once you click 'save', you will return to the main 'Users' page and a pop up on the bottom right of the page will confirm that this user's system functions have been saved.



## Transferring MAU to another user:

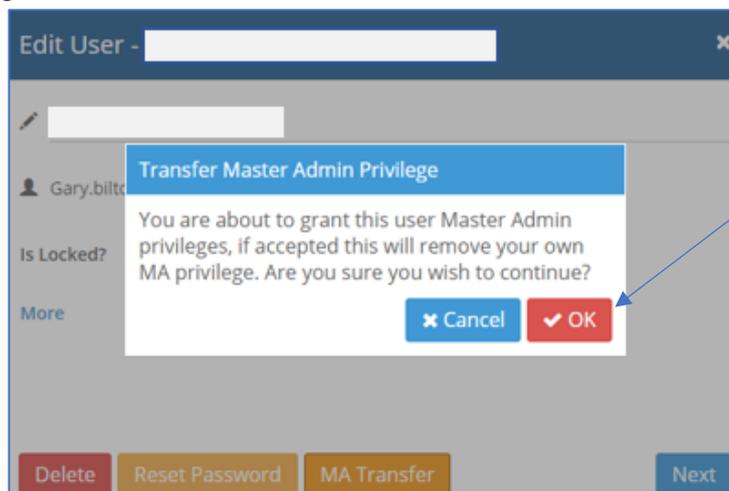
1. The user you are wishing to transfer the MAU privilege to must already have a user account and;
  - have a valid email address as their username.
  - must have a phone number populated (found in the 'more' section).



**If the new MAU does not have one of the above the MA Transfer button/option will not be shown.**

You must add these details and 'save' the user account, when re-opening the user account, the MA Transfer button/option will be shown.

2. Click the MA Transfer Button, this will open a pop-up, asking you to confirm or cancel the change.



Clicking OK will generate an email to the prospective MAU.

3. The prospective MAU must click on the link in the email which will take them to the login screen. Once logged in they will see a MAU Transfer request on their 'My Details' page, within 'My Account'.

## User Reports

Several reports are available to download for users with relevant privileges. They can request various reports regarding the behaviour of their users, these reports will only be available to be downloaded once logged into the system.

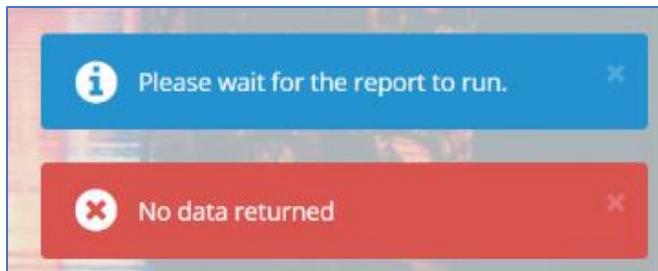
All available reports can be found within 'Tools' drop down and the 'User Reports' functionality can be accessed by clicking on 'User Reports'.



This function allows MAUs of a company group, and those with access to User Reports to generate two User reports detailing meter search details for all the users within their company group, reports are delivered in CSV format.

Once you click on Download, a pop up will advise you to please wait for the report to run.

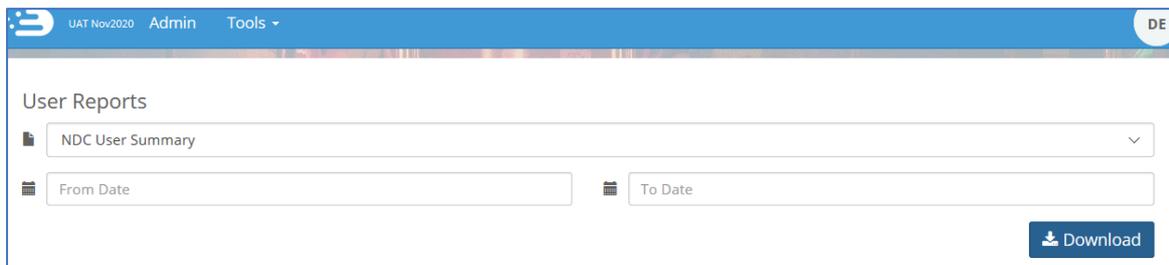
If a report is not available for your chosen timeframe, the system will notify you like so.



If a report exists, a pop up will ask you if you wish to open, save, or cancel the report download.

### 1. User summary report

The Summary report lists details for each user that has made searches in a user configurable time period, where an MPAN has been selected. The report shall display all the user details as in the User Detail Report, but only display totals instead of information about the specific reports.



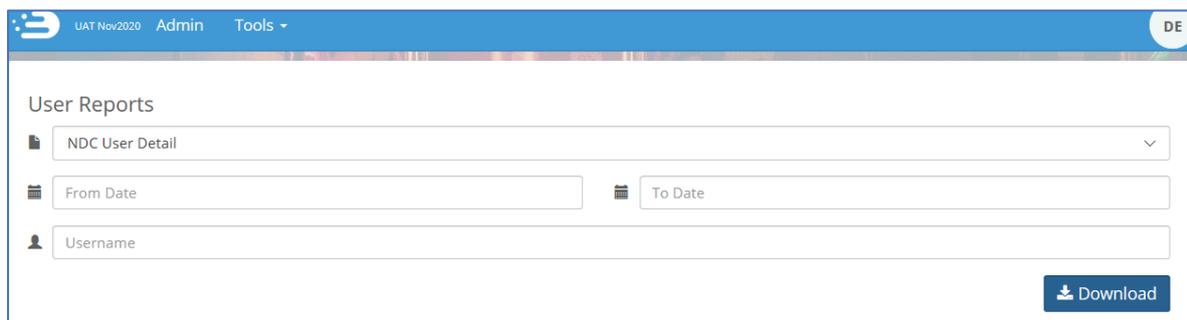
## 2. User details report

The User Details report lists all MPAN Searches that have been performed during a certain period of time. The search can be for a specific user (by entering a username in the search parameters), or if no username is entered, for an entire company group.

As this report lists all MPAN searches we would recommend restricting the time periods when doing reports for a company group.

It shall provide the following information:

- Supplier and address of the MPAN viewed.
- User detail information such as the e-mail address, phone number and fax number, place of work for both the user and the line manager. (If these are filled in by the users' administrator).



The screenshot shows a web interface for 'User Reports'. At the top, there is a navigation bar with 'UAT Nov2020', 'Admin', and 'Tools'. Below this, the 'User Reports' section contains a dropdown menu set to 'NDC User Detail', two date input fields labeled 'From Date' and 'To Date', and a 'Username' input field. A blue 'Download' button is located at the bottom right of the form.

## Report Downloads

the 'Report Downloads' functionality can be accessed by clicking on 'Report Downloads' within the 'Tools' drop down.

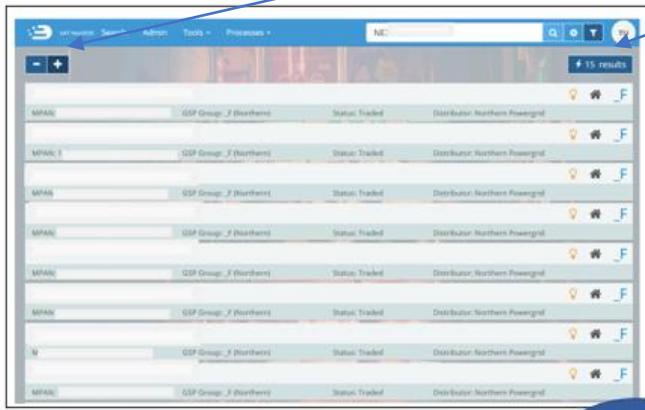


Please note that historically, a D0312 report was available within 'report downloads', however this was removed during the June 2019 release of ECOES and is no longer available in any reporting.

When a user clicks on 'Report Downloads' they will be unable to filter via report types, only by report status, as shown below.

## Refining Results

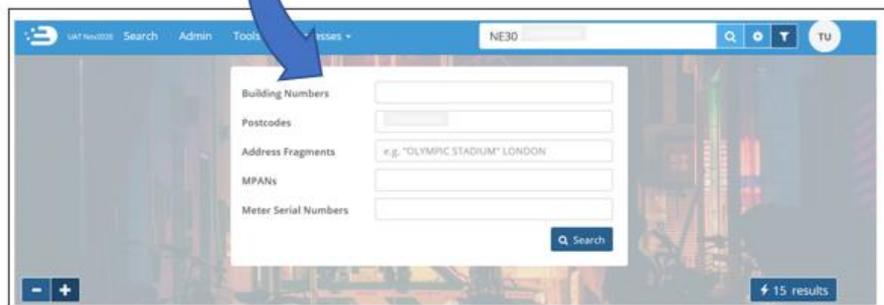
MPAN search results can be further refined by using either the plus and minus icons, or the lightning bolt icon, as described below.



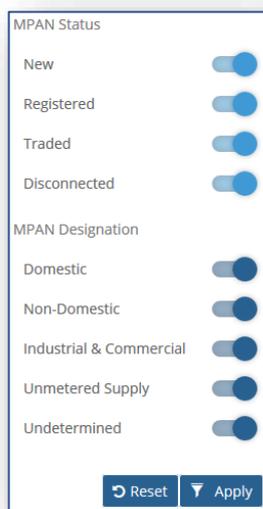
some searches return more results than expected.

The plus and minus buttons at the top left of the results screen will provide a detailed view when plus is selected (as in the screenshot) or a minimal view when minus is selected.

For an advanced search, click on the lightning bolt icon (top right of results screen) to expand the more detailed search criteria box. Then you can free type in any extra details and click on search



## Filtering Results



To include/exclude certain MPAN attributes from the search results, you can click the 'Filter' icon (🔍) to the right of the search bar which will expand the filter options.

The filter icon will move side-to-side to indicate that a filter is applied.

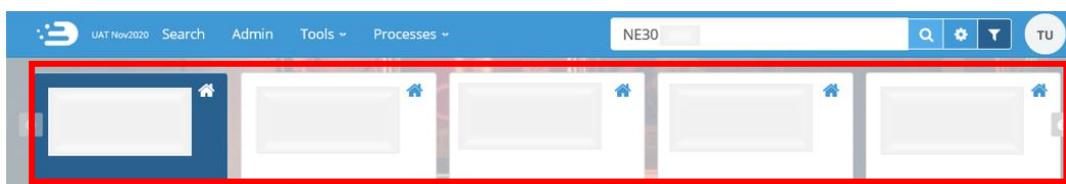
If you navigate away from the current search page (e.g. back to the homepage or to your account details page), the filter settings will be reset to include all attributes.

If your filter excludes all results, ECOES will advise you with the following pop up.



## Postcards/Postcard flipper

Searching by postcode will usually result in 'Postcards' being visible within the MPAN record. Postcards (highlighted in the red box below) are designed to allow users to quickly view another search result without needing to navigate back to the results page.



The number of postcards depends on how many search results you had; if your original search yielded 4 results then there will be 4 postcards that can be scrolled through. If your search yielded 1 result, then no postcards will be present.

Hovering over a Postcard will rotate it to display MPAN, GSP Group, Status and Distributor. Clicking on a postcard will open that MPAN page.

## MPAN Details CSS Data

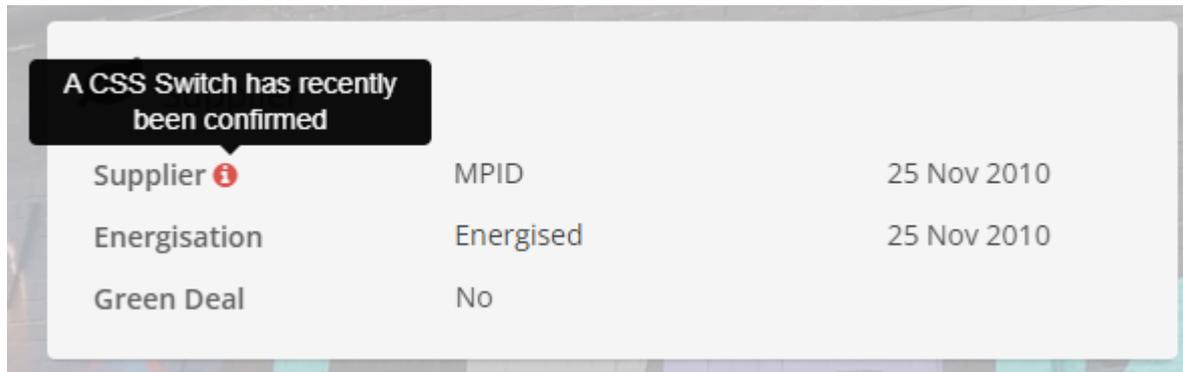
Supplier users have access to CSS data from the MPAN details screen, consent to viewing this data is given when selecting Agree and Continue from the Terms of Use confirmation dialog box when logging on to ECOES.

ECOES will expose the attributes associated to the CSS synchronisation message.

The current supplier and supply start date are taken from the latest successful, complete Registration Secured Active Synchronisation or Registration Event Synchronisation message. If no such message can be found, the current supplier and supply start date are taken from the MPRS data.

If the current supplier data from the latest CSS message does not match the current supplier data from ERDS, ECOES will highlight this with a red info icon (as shown in the screen grab below), the tooltip of

which explains that a CSS switch has recently been confirmed. The user can view the latest CSS switch data in the CSS Switching Summary panel (described in the next section).



The icon  reflects the status of the Domestic Premises Indicator at the last Registration Secured Active or Registration Event Synchronisation message received for the associated MPAN. If no such message exists, the value is derived from the MPAN Profile and Measurement Class.

Where the Domestic Premise indicator is set to 'True' the house icon will be blue

Where the Domestic Premise indicator is set to 'False' the house icon will be grey

### CSS Switching Summary

The CSS Switching Summary parameter of the MPAN details screen will reflect the status of the latest CSS Switching Synchronisation message received by ECOES.

The following message types are eligible for display within the CSS Switching Summary panel:

- Registration Cancelled Synchronisation
- Registration Event Synchronisation
- Registration Pending Synchronisation
- Registration Secured Active Synchronisation
- Retail Energy Location Synchronisation

The Information will remain available in the CSS Switching Summary section until a new message supersedes it.



### CSS Switching Messages

The CSS Switching Messages parameter of the MPAN details screen displays all CSS messages received for the associated MPAN within the last 90 calendar days. Once the 90-day threshold has been reached, the message will no longer be displayed within the CSS Switching Messages panel.

✉ CSS Switching Messages

Event Date	Reg. Status ⓘ	Reg. Status Date	Supplier	Dom. Ind.	Reg. ID ⓘ
20 May 2021 17:01	Secured Inactive	20 May 2021 17:00			
20 May 2021 17:00	Secured Active	20 May 2021 17:00		🏠	
19 May 2021 18:40	Pending	19 May 2021 18:40		🏠	

### Cancelled Registration Synchronisation Messages

Once a Cancelled Registration Synchronisation Message has been received the CSS Switching Messages and CSS Switching Summary parameters will display the Cancelled Synchronisation message.

However, the Supplier and Meter History parameter of ECOES will remain mastered and updated through MPRS data. In cases where a cancelled registration has taken place, the following Registration Notes will be displayed once the batch associated with the MPAN has been processed:

Supplier and Meter History

Basic Detail Unsuccessful Timeline

Supplier	From	To	Objection Status	Objection Entered	Objection Removed	Registration Notes	Current
W.	18 May 2021		Withdrawn			submitted this registration and subsequently withdrew it on 13 May 2021. Supplier liability remains with This change of supplier was not successful.	
W.	17 May 2021		Withdrawn			submitted this registration and subsequently withdrew it on 12 May 2021. Supplier liability remains with This change of supplier was not successful.	
M	27 Jul 2020		Upheld	09 Jul 2020		objected to this registration on 09 Jul 2020 and did not remove this objection. Supplier liability remains with This change of supplier was not successful.	
A	05 May 2016						☑
E	26 Nov 2014	04 May 2016					

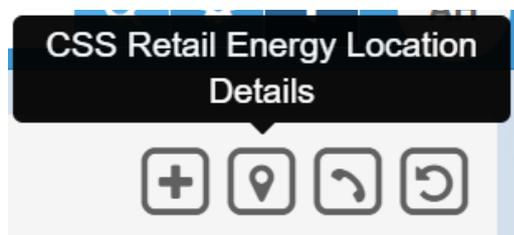
  

Meter Serial Number	Meter Type	Installed On	Removed On	MAP	Installing Supplier	Current
		07 Sep 2020			A\	☑
		11 Dec 2014	07 Sep 2020		E\	

Show MOP History

### Retail Energy Location Details

From the MPAN details screen, a user can access the Retail Energy Location data for the associated MPAN. The Retail Energy Location data can be access through the map marker icon in the top panel of the screen:



Clicking the CSS Retail Energy Location Details button will open a popup window displaying the latest Retail Energy Location data as provided within the latest CSS Retail Energy Location Address Synchronisation message.

CSS Retail Energy Location
✕

---

**Retail Energy Location**

Address Source: Match

UPRN: 123456789

**Retail Energy Location Address**

1, CHURCHILL NEWS, NEWCASTLE UPON TYNE, NE6 1ZZ

Confidence Score: 100	Logical Status: 1 - Approved	Language: ENG	Organisation:
Address Type: DPA	Classification: RD04	Latitude: 54.965786	Longitude: -1.577427

1, CHURCHILL NEWS, SAINT PETERS BASIN, NEWCASTLE UPON TYNE, NE6 1ZZ

Confidence Score: 100	Logical Status: 1 - Approved	Language: ENG	Organisation:
Address Type: LPI	Classification: RD04	Latitude: 54.965786	Longitude: -1.577427

Close

## Registrable Measurement Point (RMP)

The RMP is the status of an MPAN held in MPAS at a given point depending on the data provided to MPAS by Suppliers and Distribution Business. The RMP Status is within the MPAN page.

Each RMP Status is defined in the REC Data Specification, available via the REC Portal.

RMP Status	Definition
Created	A new MPAN created but no Supplier registered or MPAN has a Supplier registered but not all the MPAS data has been provided
Operational	All MPAS Data Items have been provided
Terminated	The MPAN has been disconnected

An example from ECOES is shown below, with RMP status displays Operational.

The screenshot shows the MPAN details page in the ECOES system. The 'RMP Status' is highlighted with a red box and is set to 'Operational'. Other details include: Trading Status: Traded (01 Aug 1997), Distributor: EELC (UK Power Networks), GSP Group: \_A (Eastern) (01 Aug 1997), and Line Loss Factor Class: 201 (02 Feb 2018). The right-hand side of the page features a map of the UK with a location pin and a 'GSP Group' label.

## Supplier, MOP and Meter History within the MPAN detail page

At the lower part of the MPAN detail page, users with access are able to view additional information regarding the MPAN, such as:

- Current and historical Meter details.
- MOp and Supplier history, and
- Links and details relating to to associated MPANs (if any).

Below, you will see the **basic - default view** – showing current and historical supplier and meter details.

The screenshot displays the MPAN detail page with three main sections:

- Current Meter Details:** A table with columns: Meter Serial Number, Meter Type, MAP, Installed On, Installing Supplier, and Associated MPANs. It shows one entry for meter E.
- Supplier and Meter History:** A section with tabs for Basic, Detail, Unsuccessful, and Timeline. It contains two tables:
  - Supplier History Table:** Columns: Supplier, From, To, General Access Number, Current. It lists several historical supplier changes.
  - Meter History Table:** Columns: Meter Serial Number, Meter Type, Installed On, Removed On, MAP, Installing Supplier, Current. It shows details for meters E and F.
- MPAN Relationships:** A table with columns: Primary MPAN, From, To, Secondary MPAN, Set By Supplier, From, To. It shows a relationship between two MPANs starting on 02 Jul 2019. A blue button labeled 'Related MPAN Search' is visible.

Where there are related MPAN(s) the user can view the high level information here and also click on the 'Related MPAN Search' button to open that MPAN details page. This is further covered [here](#).

Clicking on 'Show MOP History' will open up the MOP History view, this will sit in between Supplier and Meter History and MPAN Relationships – like so.

The screenshot shows the 'Supplier and MOP History' view, which includes a table with columns: Supplier, From, To, MOP, From, To. It displays a detailed timeline of supplier and MOP changes.

The user also has options to view the records in detailed view, to show the timeline and view unsuccessful registration records (where there any any), which will show like so.

The screenshot shows a detailed view of an unsuccessful registration record. It includes a timeline with dates: 25 Jul 2006 - 17 Nov 2007, and 03 Mar 2003. A red box contains the following text: "Upheld 14 Feb 2003. EELC objected to this registration on 14 Feb 2003 and did not remove this objection. Supplier liability remains with EELC. This change of supplier was not successful."

## MPAN Search and Details View – Data Access Matrix (DAM)

### Data Item Restrictions

Access to individual data items is determined by the category to which a company group is assigned. Each category represents a role within the RECCo Data Access Matrix (DAM). The Data Access Matrix defines which data items are available to which roles, e.g. a Supplier may have access to the GSP Group data item, but a Virtual Lead Party may not.

The full RECCo Data Access Matrix can be accessed through the EMAR/REC Portal.

The ECOES website applies data item restrictions to both the primary search result screen and MPAN details screen. Restrictions are implemented by obscuring the data item value with a 'no entry' icon, as seen below.

The first screenshot shows a search result for '1 CHURCHILL, TYNE, AA6 6AA'. The MPAN field is obscured with a 'no entry' icon. The GSP Group, Status, and Distributor fields are also obscured with 'no entry' icons.

The second screenshot shows the MPAN details view for '1, CHURCHILL, TYNE, AA6 6AA'. The MPAN field is obscured with a 'no entry' icon. The GSP Group field is also obscured with a 'no entry' icon. The Trading Status, RMP Status, and Line Loss Factor Class fields are visible.

Field	Value
Trading Status	Traded
RMP Status	Operational
Distributor	⊘
GSP Group	⊘
Line Loss Factor Class	001

### Search Result Restrictions

Search result restrictions are defined at a company group level. These restrictions limit the results that can be returned by the primary search functionality. For example, a company group may be restricted to search results for MPANs with a Profile Class of '0'. These restrictions are determined by the access agreements agreed between RECCo and individual participants.

### Terms And Conditions Agreement

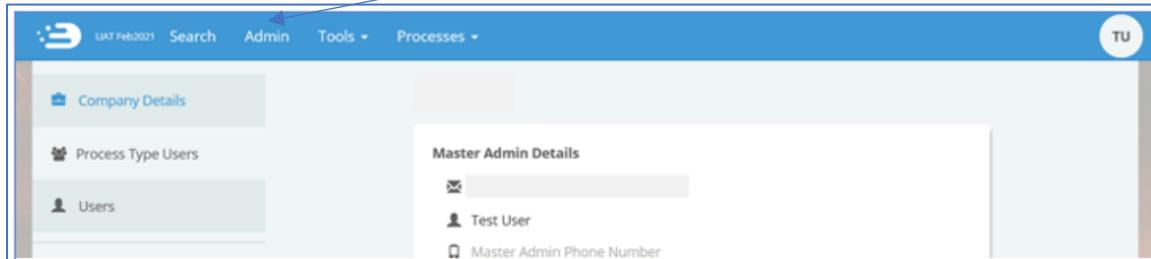
On logging into the system, all users will be presented with a session login screen that requires them to positively confirm that they agree to the Terms of Usage of ECOES. A Supplier user will have to flag whether they have legitimate reason for viewing a specific MPAN, by agreeing to the Terms of Usage (as per page 3 of this document). Once done, they will be able to enter the ECOES website with the appropriate access for their Company Group.

## Meter History

A Meter History Module is available for Supplier and MOP users, which allows them to search for a meter's history by Meter Serial Number (MSN) or MPAN. In order to have visibility of the Meter History tool, a user must be given access within the admin System Functions tool.

## Granting Access to Meter History Search Function

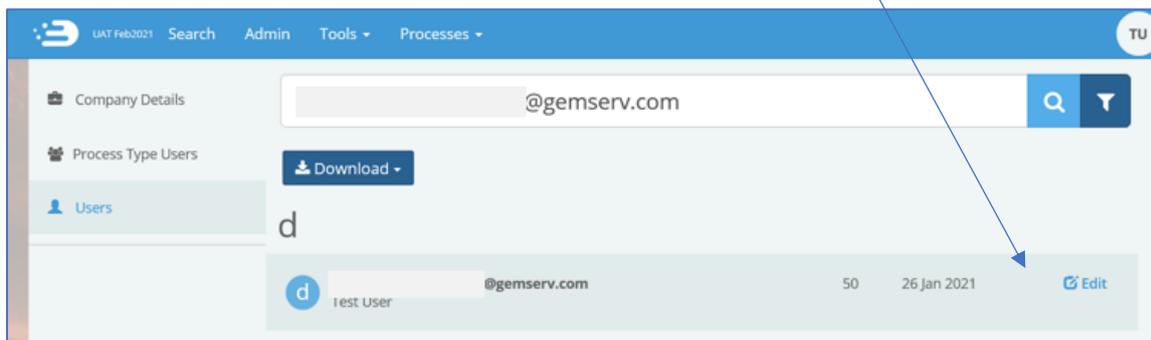
Supplier and MOP MAU's, and admin users with User Maintenance privileges can grant access to other users within their own Company Group. To do so, follow the steps to log in to your ECOES account and click on 'Admin'.



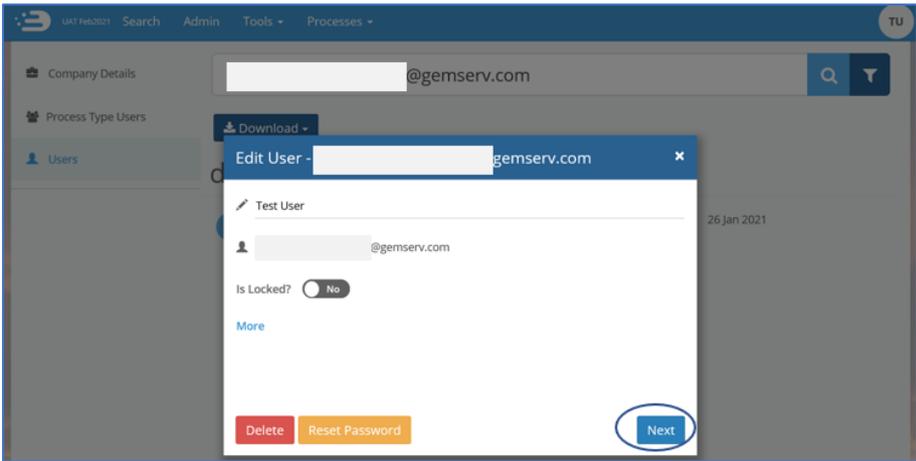
Next, click on 'Users' and in the search tab begin typing the name of the user who you wish to grant Meter History privileges to user accounts with that name will become visible below the search bar.



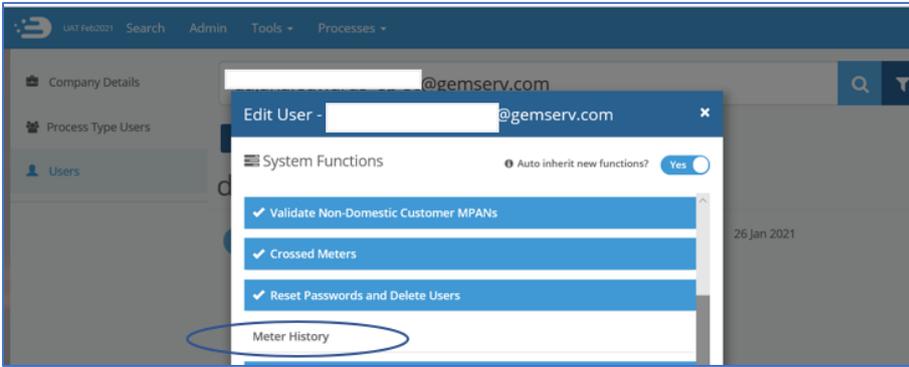
Select their name from the dropdown and then select their record to 'edit' it



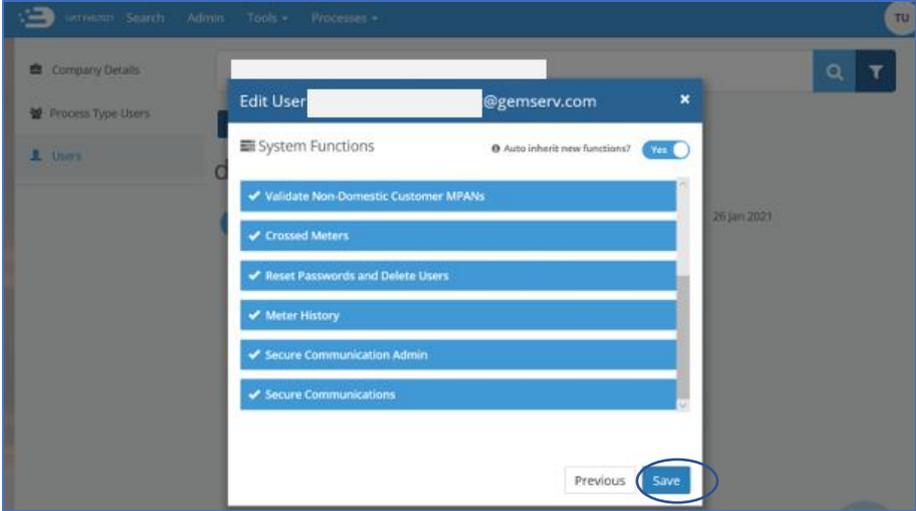
Once you have clicked on their record, you will see a pop up giving you an option to edit their name, lock the account, or add further information by clicking 'More'. At the bottom part of this edit user box, you have the options to delete the user, reset their password or to select 'next', click on next.



This will open the user's system functions pop-up. Scroll down to find 'Meter History', which as seen below has not been selected (as it is not blue and there is no tick against it).



Click on Meter History and you will see it turn blue, with a tick alongside it, then click 'save'.



A pop up will confirm

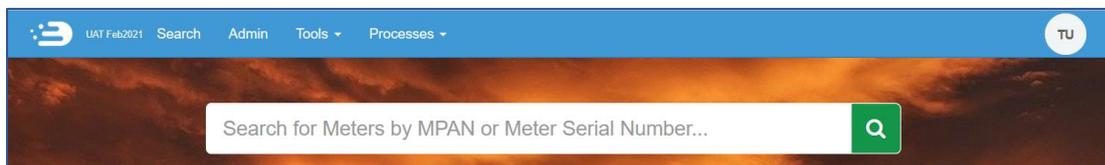
The user will now have access to the Meter History functionality, within Tools.

## Meter History Tool

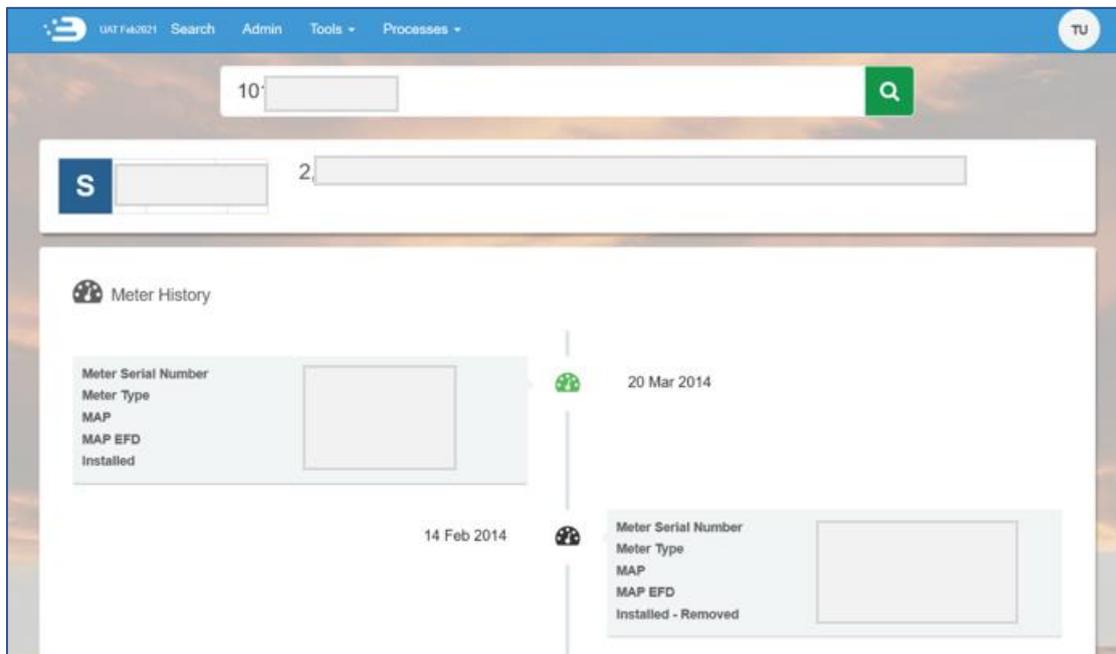
The 'Meter History' functionality within the 'Tools' drop down allows the Supplier user to search for, and view meter history for any Meter.



Clicking on 'Meter History' brings up a new search bar, where the user can search by MPAN or Meter Serial Number (MSN). This search icon is green and does not contain filters.



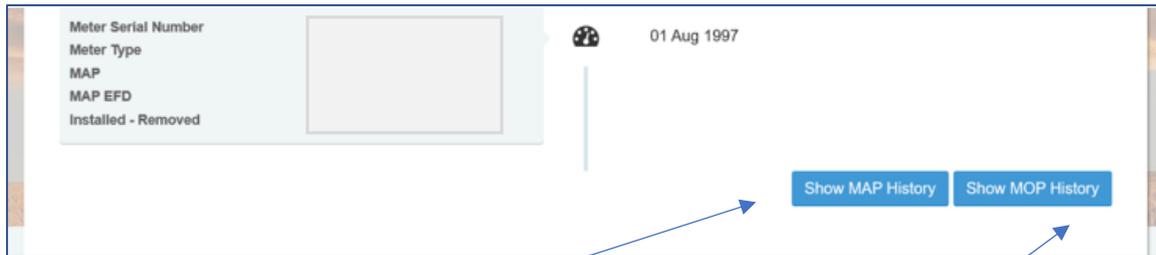
When the user enters the MPAN or MSN and clicks on the search icon, they will be presented with the view shown below.



The Meter History for that MPAN/MSN is displayed in a timeline view (with the top being current meter) and comprises of the following Data Items:

- S-number
- Meter Serial Number
- Meter Type
- Meter Asset Provider(MAP) & MAP EFD
- Installation Date

Towards the lower half of the page, the user is given the option to view more details by selecting 'Show MAP History' and/or 'Show MOP History'.



Clicking on 'Show MAP History' will open the MAP history, including MSN, installation date, removal date (if applicable), MAP MPID, and associated dates.

Clicking 'Show MOP History' will open the MOP History, including Supplier MPID and associated dates, as well as MOP MPID and associated to and from dates.

**When 'Show MAP History' is selected.**

The screenshot shows a table titled 'Meter and MAP History'. At the top right, there are buttons for 'Hide MAP History' and 'Show MOP History'. The table has the following columns: MSN, Installed, Removed MAP, From, and To. The MSN column contains a greyed-out box. The table contains three rows of data.

MSN	Installed	Removed MAP	From	To
[Greyed out]	20 Mar 2014	MFMP	20 Mar 2014	
[Greyed out]	14 Feb 2014	19 Mar 2014 MLBB	14 Feb 2014	19 Mar 2014
[Greyed out]	01 Aug 1997	13 Feb 2014 EELC	01 Aug 1997	13 Feb 2014

**When 'Show MOP History' is selected.**

The screenshot shows a table titled 'Supplier and MOP History'. At the top right, there are buttons for 'Show MAP History' and 'Hide MOP History'. The table has the following columns: Supplier, From, To MOP, From, and To. The Supplier column contains a greyed-out box. The table contains ten rows of data.

Supplier	From	To MOP	From	To
[Greyed out]	01 Mar 2016	LBSL (Lowri Beck)	01 Mar 2016	
[Greyed out]	26 Jan 2010	29 Feb 2016 BGAS (British Gas)	31 May 2011	29 Feb 2016
[Greyed out]		ONSA	26 Jan 2010	30 May 2011
[Greyed out]	29 Feb 2008	25 Jan 2010 EELC (Siemens)	29 Feb 2008	25 Jan 2010
[Greyed out]	08 Mar 2007	28 Feb 2008 ONST	08 Mar 2007	28 Feb 2008
[Greyed out]	06 Jun 2002	07 Mar 2007 EELC (Siemens)	06 Jun 2002	07 Mar 2007
[Greyed out]	02 Apr 2002	05 Jun 2002 EELC (Siemens)	02 Apr 2002	05 Jun 2002
[Greyed out]	15 Jan 2002	01 Apr 2002 EELC (Siemens)	15 Jan 2002	01 Apr 2002
[Greyed out]	18 Dec 2001	14 Jan 2002 EELC (Siemens)	18 Dec 2001	14 Jan 2002
[Greyed out]	06 Mar 2000	17 Dec 2001 EELC (Siemens)	06 Mar 2000	17 Dec 2001

## Primary and Secondary Associations (Associated MPAN's)

Once a user searches for an MPAN in ECOES which has an associated MPAN, they will be presented with the view below.

The screenshot displays the ECOES system interface for an MPAN. The top navigation bar includes 'Search' and 'Admin' options. The main content area is divided into several sections:

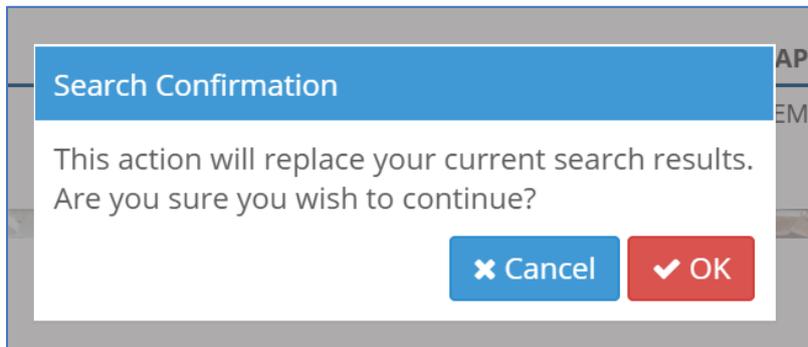
- MPAN Details:** Shows trading status (Traded), RMP status (Operational), distributor (EELC), GSP group (\_A), and line loss factor class (064).
- Supplier:** Lists the supplier, energisation date (01 Aug 1997), and green deal status (No).
- Agent:** Lists the agent (NHH Data Aggregator), data collector (NHH Data Collector), and meter operator (EMEB).
- Settlement Parameters:** Lists parameters such as MC (A - NHH Metered), PC (04), SSC (0284), and MTC (672).
- Smart Communications:** Lists communication parameters like SMSO, DCC Service Flag, IHD Status, and SMETS Version.
- Current Meter Details:** A table showing meter serial number, meter type (N), MAP (EELC), installed on date (01 Aug 1997), and installing supplier. A circled 'Associated MPANs' column shows the value '1'.
- Supplier and Meter History:** A table showing supplier history and meter history. A 'Show MOP History' button is present.
- MPAN Relationships:** A table showing primary and secondary MPAN associations. A circled 'Related MPAN Search' button is present.

Key elements circled in blue in the original image include:

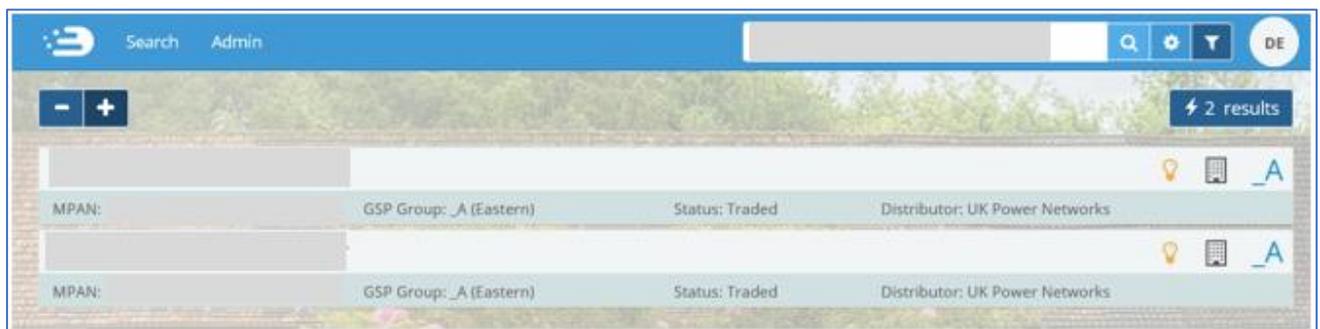
- The 'Related MTC' button in the MPAN details section.
- The 'Associated MPANs' column in the Current Meter Details table.
- The 'Related MPAN Search' button in the MPAN Relationships section.
- The 'Primary MPAN' and 'To Secondary MPAN' columns in the MPAN Relationships table.

Both the Primary and Secondary MPAN are listed under MPAN Relationships.

To view the other MPAN records, click on 'Related MPAN Search' and you will see the following pop up.



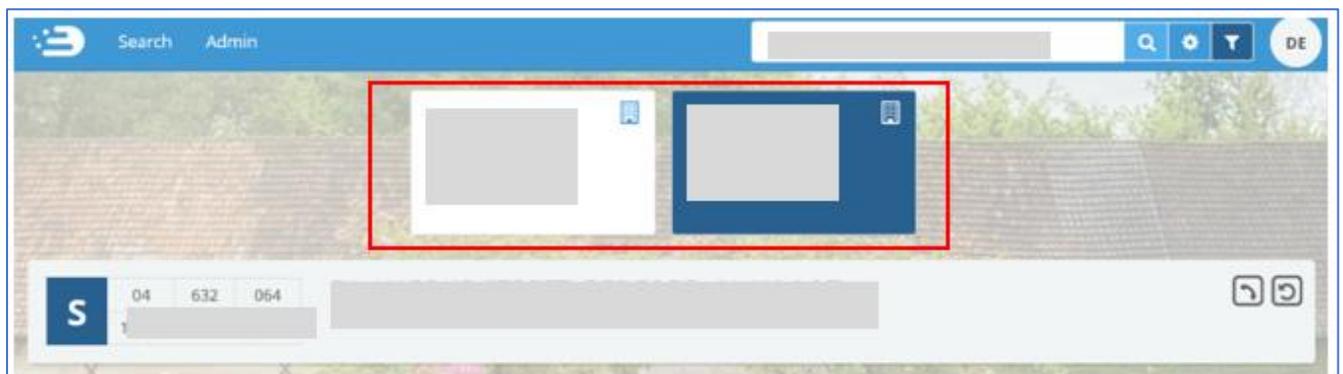
If you click Ok, you will be taken back to the MPAN search screen, where all related MPANs will be displayed and listed in the search bar.



Clicking into any one of the records will bring up Postcards. Postcards (highlighted in the red box below) are designed to allow users to quickly view another search result without needing to navigate back to the results page.

The number of postcards depends on how many search results you had; if your original search yielded 4 results then there will be 4 postcards that can be scrolled through. If your search yielded 1 result, then no postcards will be present.

Hovering over a Postcard will rotate it to display MPAN, GSP Group, Status and Distributor. Clicking on a postcard will open that MPAN page.



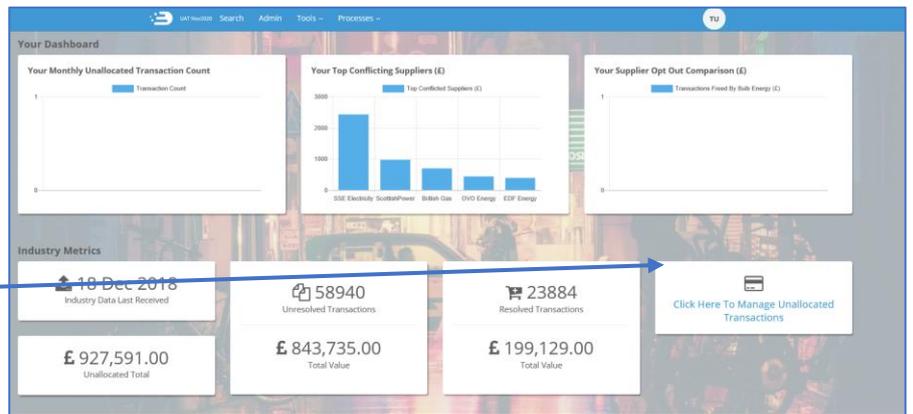
## PPMIP Exceptions

The PPMIP Exception Screen allows users to manually Opt-out of receiving PPMIP payment transactions for a specific MSN, MPAN and Registration combination. This functionality is only available to users that have been given access to PPMIP Exception Screen.

The PPMIP Exceptions functionality can be accessed via the 'Tools' dropdown.



The landing page for this functionality displays information related to the users' company group (e.g. the top conflicting suppliers) and industry metrics (e.g. how many unresolved transactions and unallocated total).



For the user to search for and add/amend opt-out periods, click on the 'Manage Unallocated Transactions' button. This will take the user to a search which displays the top 10 unallocated transactions for the user's company group.

Meter Serial Number	Transaction Count	Total Value	Earliest Transaction	Latest Transaction	
S08X46555	60	£677.00	28 May 2018	24 Nov 2018	↕
S12C48884	6	£594.00	31 Mar 2018	27 Oct 2018	↕
S15C19815	24	£420.00	06 Jun 2018	10 Nov 2018	↕
S14C30594	19	£369.00	27 Aug 2018	14 Nov 2018	↕
S93A75002	13	£295.00	11 Jul 2018	06 Nov 2018	↕
S10X14082	11	£265.00	18 Jun 2018	26 Oct 2018	↕
S14B10035	8	£240.00	17 Sep 2018	04 Nov 2018	↕
S09P72574	17	£220.00	14 Aug 2018	09 Nov 2018	↕
S14N11773	9	£215.00	26 Sep 2018	08 Nov 2018	↕
S15C49038	8	£170.00	22 Sep 2018	23 Nov 2018	↕

As well as searching for a specific MSN/MPAN, a user can also find unallocated transactions by filtering by Supplier Company Groups. To do this click on the filter icon adjacent to the search icon, the user can then toggle/un-toggle company groups to include in their results and this will be actioned when they click 'Apply'.

Company Group	Transactions	Total Value	In Value	Out Value	Filter
SSE Electricity	108	£2,430.00	£2,430.00	£0.00	<input type="checkbox"/>
ScottishPower	73	£972.00	£972.00	£0.00	<input type="checkbox"/>
British Gas	58	£700.00	£700.00	£0.00	<input type="checkbox"/>
OVO Energy	30	£435.00	£435.00	£0.00	<input type="checkbox"/>
EDF Energy	16	£383.00	£383.00	£0.00	<input type="checkbox"/>

Buttons:

Search by MSN or MPAN...

Top 10 Unallocated Transactions

Meter Serial Number	Transaction Count	Total Value	Earliest Transaction	Latest Transaction
---------------------	-------------------	-------------	----------------------	--------------------

Once a user selects an MSN (by clicking on the record) the opt-out screen will be opened.

Search by MSN or MPAN...

Meter - [redacted]

S 01 835 003 [redacted]

MPAN: [redacted] In  Out

Supplier from: 11 Mar 2013 to: Present

Invert selected dates  In

Opt in from: 11/3/2013 to: 21/10/2020

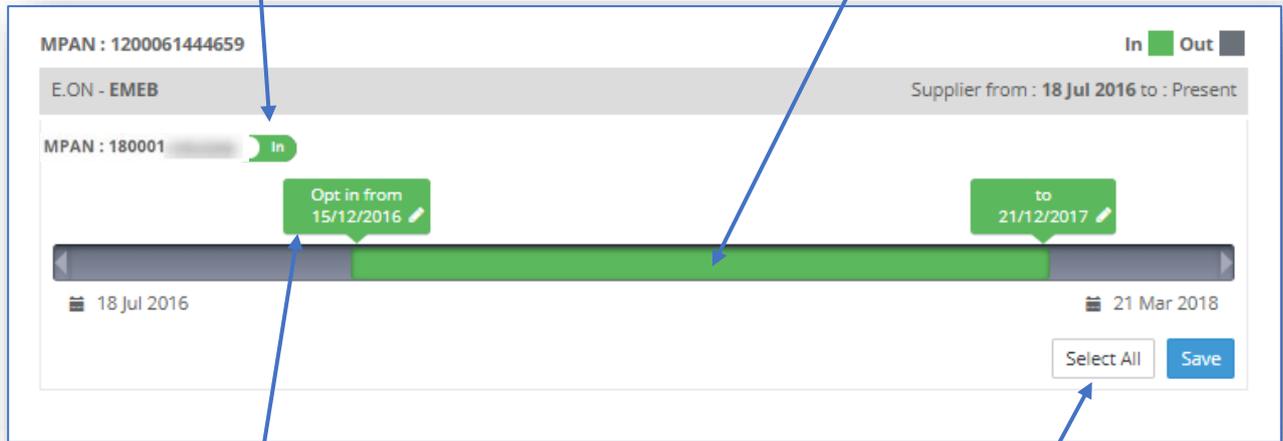
11 Mar 2013 21 Oct 2020

Select All Save

+ Supplier History (0) - Where the supplier periods overlap

'Invert' selection so that user is creating an opt in period or opt out period.

'Drag' entire period maintaining the period length by dragging the green bar in the timeline.

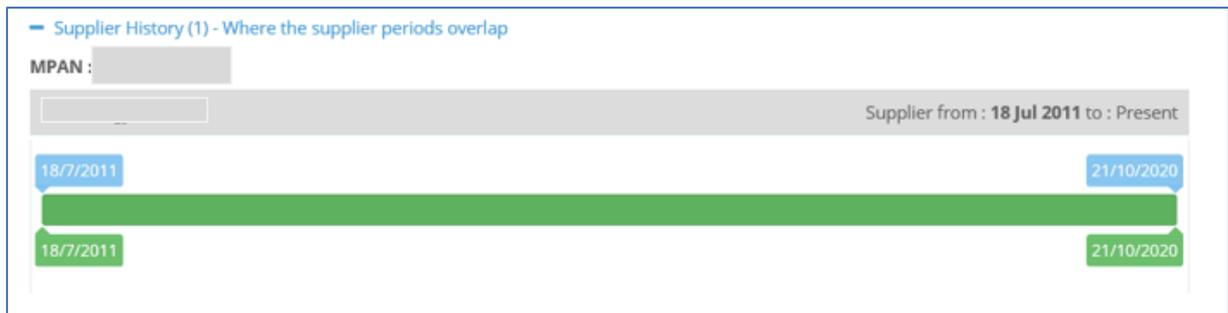


'Drag' period start and end dates by clicking and dragging the green box(es) above the timeline.

Select all – this will either opt-in or opt-out of the whole period depending whether the user has 'Inverted' the selected dates.

At the bottom of the opt-out management page, there is an option to view what the other supplier(s) have set for their opt-out periods. This will only show where the supply periods overlap and may not include the full supply period for the users' Company Group.

Where this is visible (where supplier periods overlap) then you will see.



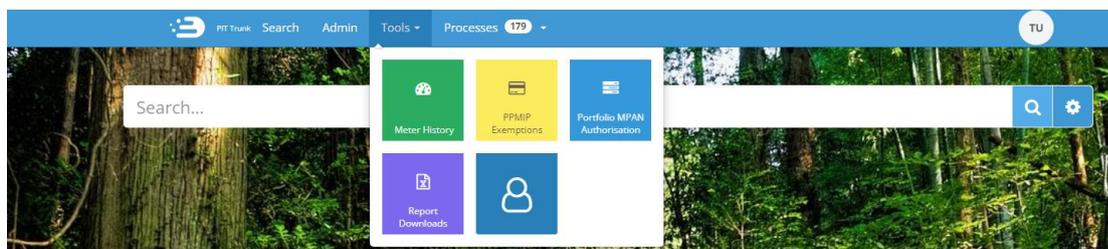
Where this is not visible (where supplier periods do not overlap) then you will see.



## Portfolio Supplier Authorisation

When a Non-Domestic-Customer (NDC), or other portfolio access user, submits a request to view an MPAN(s), the request is directed to the current supplier of that MPAN who can either accept the request (allowing the portfolio user to view the MPAN data) or reject the request. All requests should be reviewed within 21 days.

The portfolio authorisation functionality can be accessed via the 'Tools' drop down. When the Supplier logs in, they will see a number against 'NDC MPAN Authorisation'.



On accessing the functionality, the Supplier User will be presented with a dashboard which shows which participants have outstanding requests and how long they have been waiting, for example.

The screenshot displays the 'MPAN Requests' dashboard. It includes a search bar for customers and a table summarizing requests by customer. The table has columns for customer name, and counts for requests received within different timeframes: less than 1 week, less than 2 weeks, less than 3 weeks, and more than 3 weeks. A 'Total' column is also present.

Customer	< 1 Week	< 2 Weeks	< 3 Weeks	> 3 Weeks	Total
Anglian Water S	7	0	0	0	7

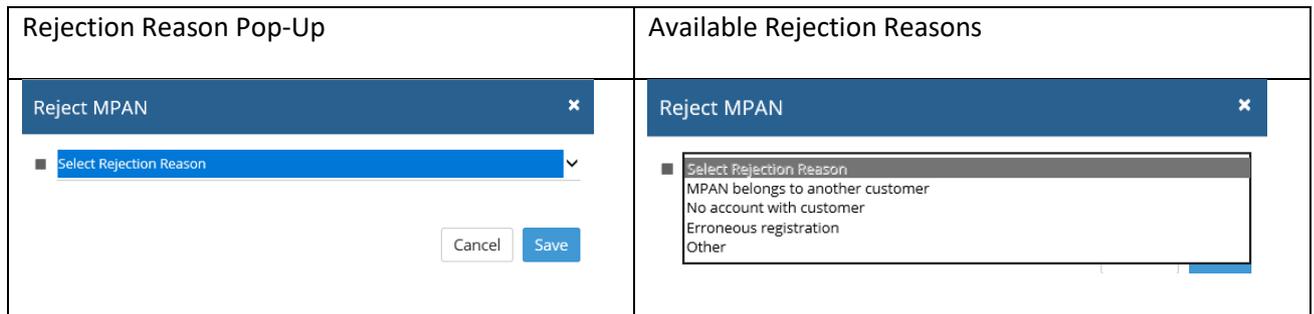
Clicking on the name of the participant will present a list of MPANs that require Approval or Rejection. There is an option to "Approve All", "Reject All" or do this individually for each MPAN.

The screenshot shows the 'Anglian Water S - Pending MPANs' page. It features a table with columns for MPAN, Date Uploaded, Notes, Supplier MPID, Authorised in Other Portfolio, and Reject / Approve. There are buttons for 'Export', 'Reject All', and 'Approve All' at the top of the table. The table contains seven rows of pending requests, all dated 21 Oct 2020 and marked as 'No' for 'Authorised in Other Portfolio'.

MPAN	Date Uploaded	Notes	Supplier MPID	Authorised in Other Portfolio	Reject / Approve
	21 Oct 2020	-		No	<input type="button" value="Reject"/> <input type="button" value="Approve"/>
	21 Oct 2020	-		No	<input type="button" value="Reject"/> <input type="button" value="Approve"/>
	21 Oct 2020	-		No	<input type="button" value="Reject"/> <input type="button" value="Approve"/>
	21 Oct 2020	-		No	<input type="button" value="Reject"/> <input type="button" value="Approve"/>
	21 Oct 2020	-		No	<input type="button" value="Reject"/> <input type="button" value="Approve"/>
	21 Oct 2020	-		No	<input type="button" value="Reject"/> <input type="button" value="Approve"/>
	21 Oct 2020	-		No	<input type="button" value="Reject"/> <input type="button" value="Approve"/>

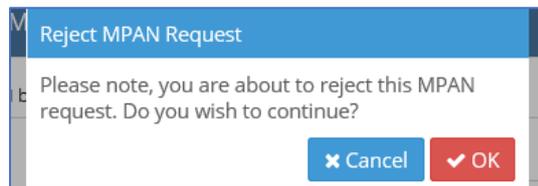
End of search results

Rejecting an MPAN will generate a 'pop-up', asking the user to select a rejection reason from the dropdown.



Selecting "Other" will allow the user to add in a custom reason in a field underneath.

Once an MPAN is Rejected and the reason given, they will see a 'pop up' asking the user if they wish to continue.

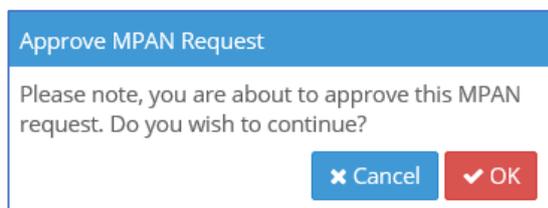


If the user clicks on 'Okay' a 'pop-up' at the bottom of the screen will confirm.



Once an MPAN is rejected, it is put into a 'blocked' state. Until the MPAN is unblocked it cannot be added to the same portfolio again. A blocked MPAN will be automatically unblocked after 21 days have passed since initial upload (if a Supplier rejects an MPAN after the 21-day window, the MPAN is automatically blocked the next day). The Code Manager will also have the ability to manually unblock a rejected MPAN before the automatic unblock date.

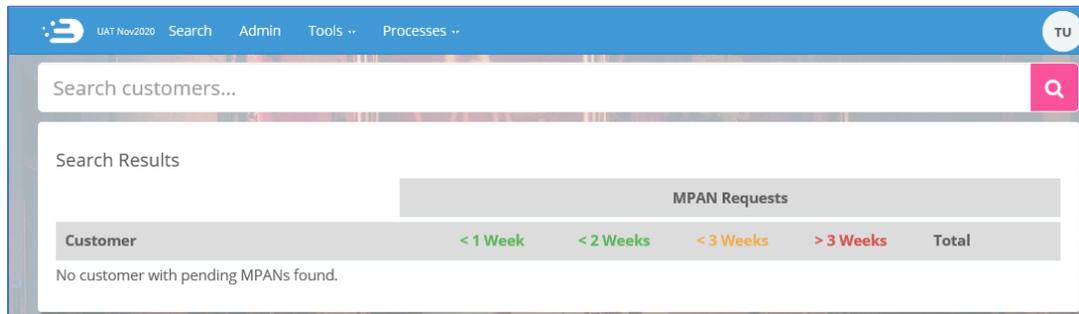
If a user selects 'Approve', they will see a 'pop up' asking the user if they wish to continue, followed by another pop up at the bottom of the screen (if they clicked 'ok').



Those authorised or rejected shall be communicated to the participant the next time they log in. MPANs that are authorised by the Supplier shall be added to the portfolio. Those rejected shall include the reason for rejection.

If an MPAN has been in the authorisation process for 90 days, it will be automatically released from the process and made available for other portfolio accounts to request access.

If there are zero outstanding NDC requests, the system will confirm this like so.



## IHD Install Status following a Smart to Dumb Meter Exchange

Users should note that following a Smart to Dumb Meter exchange, an inconsistency in ECOES data may be present. When a Smart Meter is installed the In-Home Display (IHD) will be displayed in ECOES with the Meter information. Currently ECOES will continue to hold and disseminate an invalid IHD Install Status in the situation where a Smart Meter is exchanged for a Dumb Meter until a new Smart Meter is installed, this is because the value cannot be cleared. Suppliers are advised to ignore the IHD Status where the Meter is not being operated as Smart.

## Crossed Meters

### Introduction

A Crossed Meter refers to an issue where the Energy Meter recorded for a Premises is associated to another Metering Point. This can result in the Customer being billed for the energy usage at another Premises.

REC Schedule: Resolution of Consumer-Facing Switching and Billing Problems, sets out the requirements and processes for investigating and resolving Crossed Meters in Domestic and Non-Domestic Premises. The aim of the Schedule is to provide a mechanism by which Suppliers and their Meter Operator (MOPs) can implement a uniform approach to resolving Crossed Meters.

Additional functionality also been added to ECOES to support the Crossed Meters process. This includes:

- The ability for Suppliers to create, investigate and resolve a Crossed Meter Case and link this with associated MPAN(s), Suppliers(s) and MOPs.

- The ability to record site visit results, upload files relating to the Crossed Meter Case and exchange information with associated Suppliers and MOPs in order to assist in the resolution of the Case.
- The ability for Users to use data from ECOES to identify impacted Suppliers based on the confirmed Meter Serial Number (MSN), and allow Suppliers to override this to manually associate additional MPANs.
- The ability to search, filter and sort Crossed Meter cases.

Each MPAN involved in a Crossed Meter chain will form its own Case. The current Supplier for a MPAN will manage and resolve the issue for that MPAN. Any linked MPANs, whether belonging to a different Supplier or not, will form their own Case. Each Case will have its own unique reference.

#### Crossed Meters Principles

- Crossed Meters only occur when more than one Premises is involved and different Suppliers are responsible for the different Metering Points
- The Suppliers of the affected Metering Points are responsible for investigating and resolving Crossed Meters efficiently and completely.

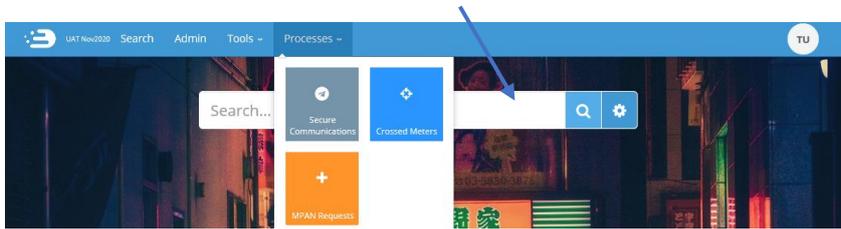
#### Access to Crossed Meters information

Access is:

- Restricted to those organisations (Suppliers and Meter Operators) involved in a Crossed Meters Case; and
- Controlled at an organisational level via access rights, which is managed via your ECOES Master Admin User (MAU), and those with User Admin permissions, using the existing user access management controls in ECOES. Further information regarding managing users can be found [here](#).

## View Crossed Meters Cases

Selecting the 'Crossed Meters' option from the Processes navigation menu will navigate the user to the 'Crossed Meter Case List' screen.



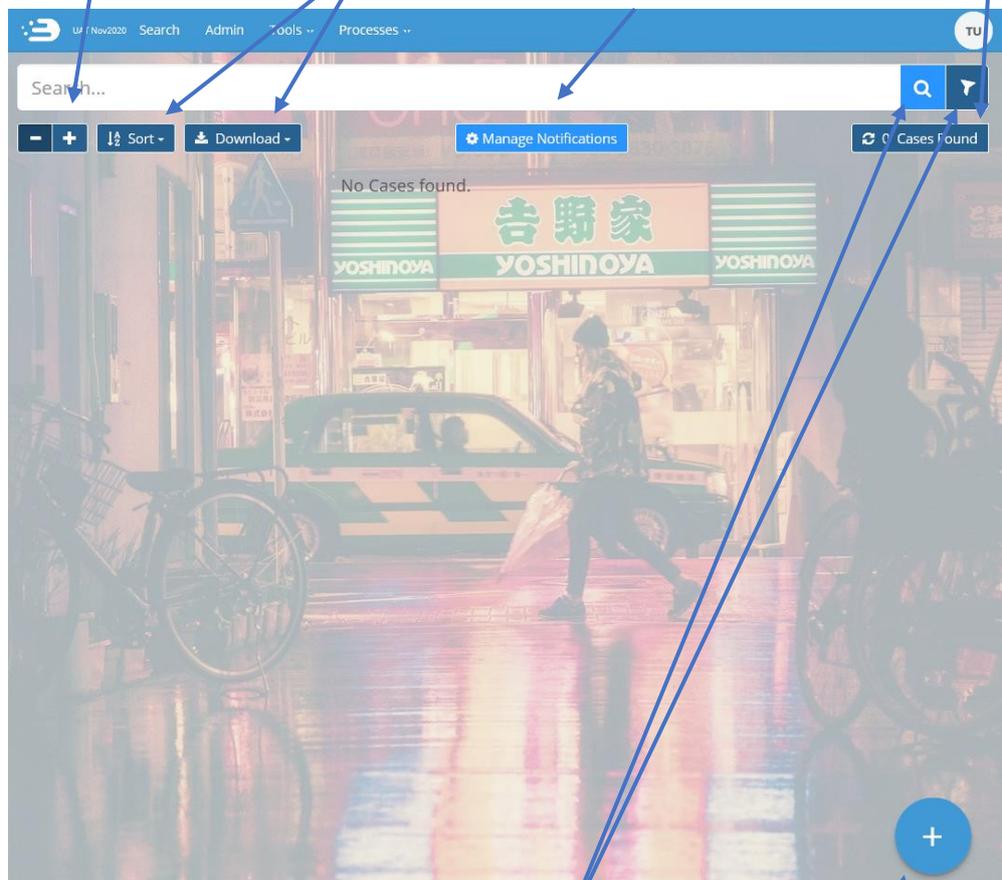
This screen lists all Cases where the current user is associated to a Case. If the user is the current MOP or Supplier or has been the MOP or Supplier since a Case was opened, then the Case will appear in this list.

Cases can be viewed in detailed view or simple view.

Sort or Download search results.

Set email notifications to daily or never.

Confirms amount of live cases.

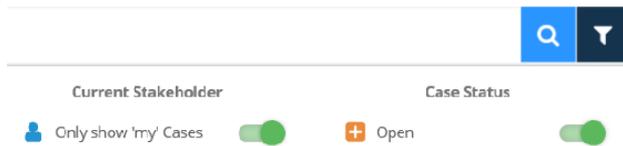


Users can search for Cases by MPAN or Case Reference, or filter the Crossed Meters Case results.

Create Case.

## Filters

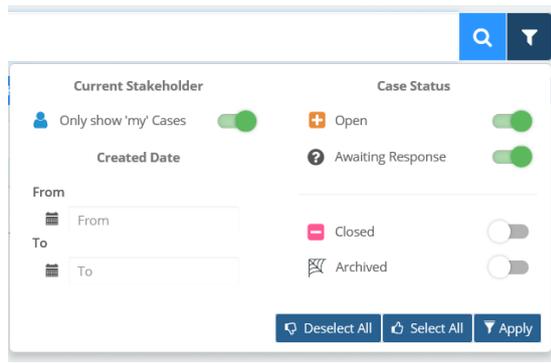
It is important for the user to use the filter as soon as they log in, as the pre-set filters might exclude pertinent information. The filter is pre-set to "Only show 'my' Cases". 'My' is in brackets due to this being a crossed meters Case and could be linked to another MPAN.



When “Only show ‘my’ Cases” is toggled, only the record(s) for the MPAN(s) belonging to the users Supplier group will be visible. The user will not have visibility of the records for both MPANs that are involved in the Crossed Meters Case.

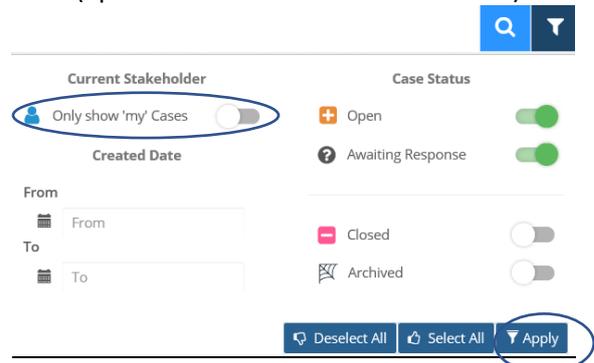
Original Filter settings

This will only show records for the users MPANs and not the full picture of the Crossed Meters Case.

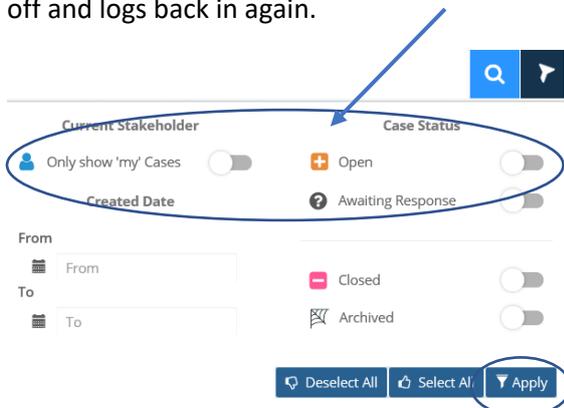


Recommended Filter settings

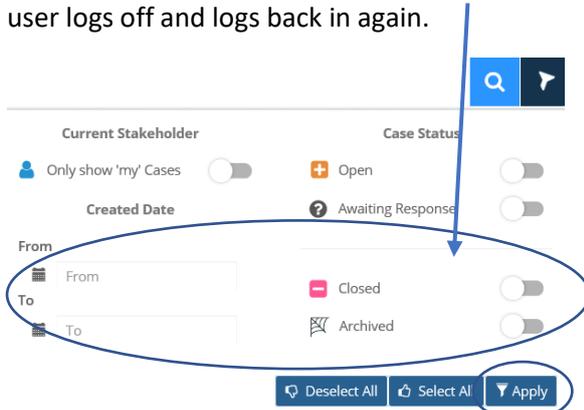
This will show all records for the users MPANs, as well as all associated records for a Crossed Meters Case (apart from closed or archived Cases).



Any Filters that a user applies from this section will be saved and will remain when the user logs off and logs back in again.

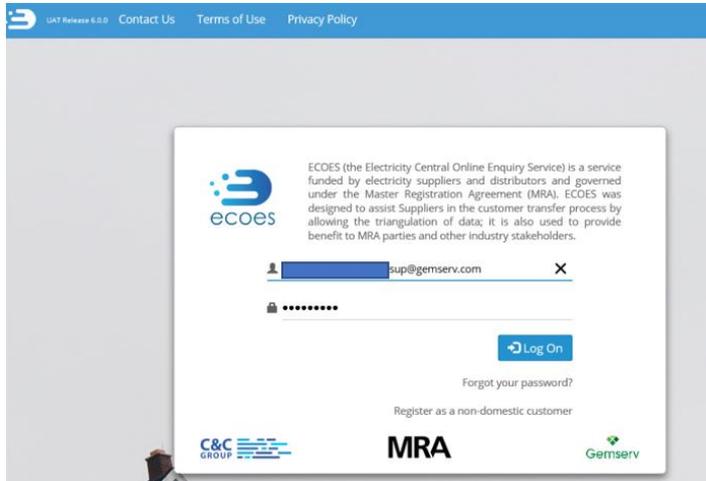


Any Filters that a user applies from this section will not be saved and will disappear when the user logs off and logs back in again.



## Create a new Crossed Meter Case

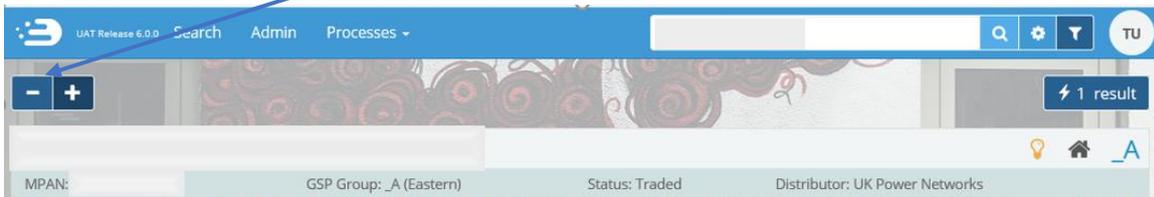
Supplier users can create new cases for MPANs where they are the current Supplier. There can only be one Active Case for each MPAN. A user can create a Crossed Meter Case via the relevant MPAN record in ECOES (located using the Search function). Firstly, log in to ECOES.



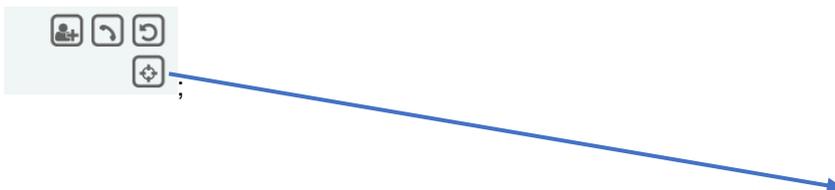
Enter in the MPAN, address or current MSN into the search bar and click 'Search'.

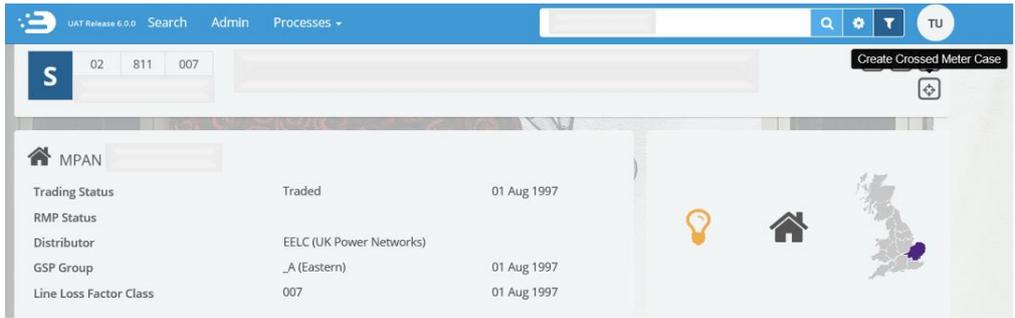


When clicked, the key MPAN details will be visible, including the address, GSP, Status and Distributor. (If you click the  it will change to simple view and only the address line will show).

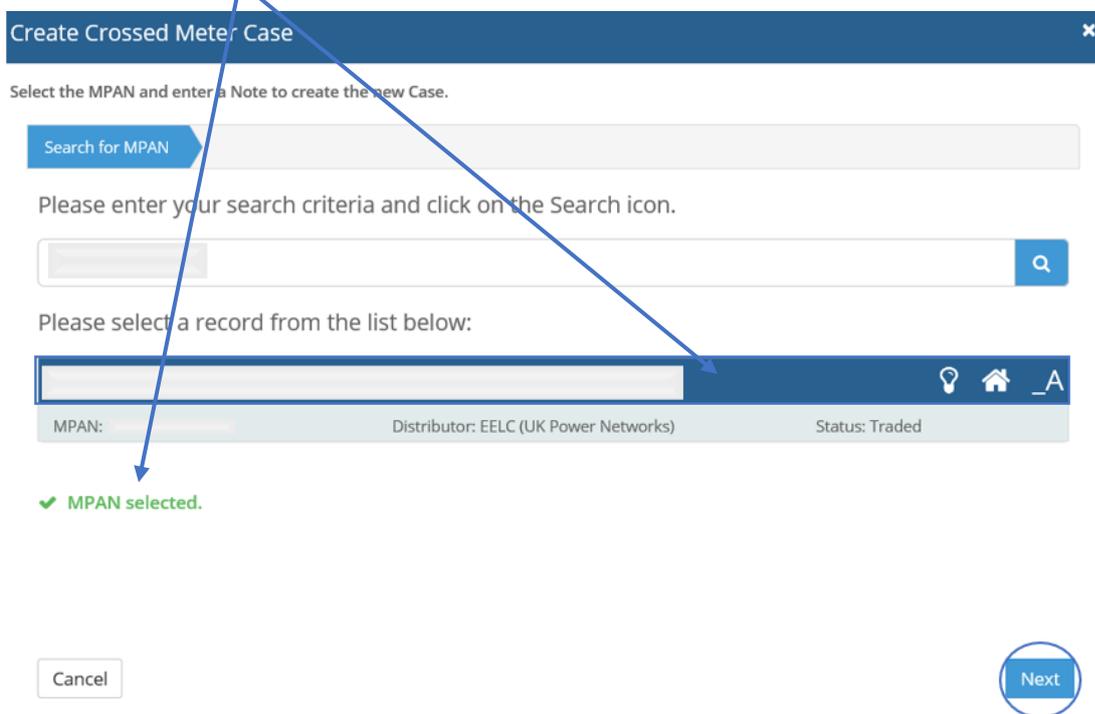


Click into the site to view full details and raise a Crossed Meter Case by clicking this icon. 





Once clicked, a separate window will ‘pop up’, pre-filled with the MPAN and associated details (Address, Fuel and Premises Type, Distributor details and GSP.) Users must select a record before clicking “Next”. A selected record will turn dark blue and a note will confirm to the user that the MPAN has been selected.



In the subsequent pop up, the MPAN, Address and Initial MSN will be pre-populated with data sourced from ECOES. The Notes field is required and must be completed by the Supplier user. Populate with pertinent Crossed Meters details and click ‘Save’. An example can be seen below.

## Create Crossed Meter Case ✕

Select the MPAN and enter a Note to create the new Case.

Search for MPAN Enter Notes

Please enter a Note.

MPAN

Address

Initial MSN

Notes  
We believe this is a crossed meters case and that meter should be swapped with MSN  
 - at

Cancel

Previous Save

Once 'Save' is clicked, the new Crossed Meters Case will be created.

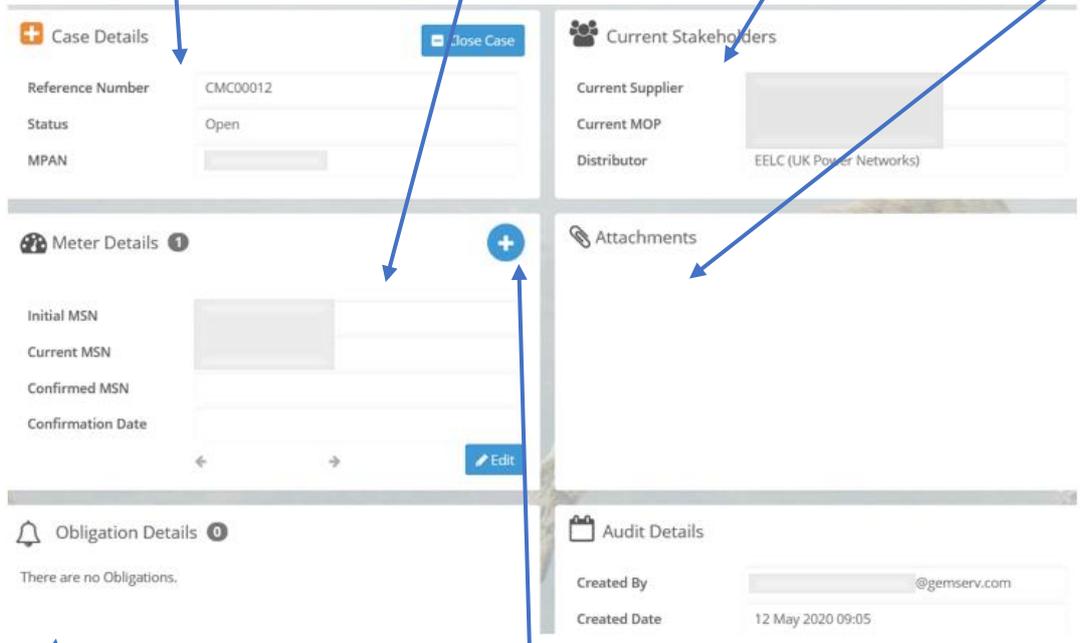
The User will then see a notification at the bottom right-hand corner of the page confirming i Case created. and will be able to view the full information within the Crossed Meters Case Details screen. The Crossed Meter Case Detail screen provides the user with all details of the Case, including providing access to all linked cases.

Once the Case is created, a Case Reference will be generated which will consist of the capital letters "CMC" followed by a five-digit number e.g. "CMC00001". Current Stakeholders (Supplier, MOP, and Distributor) will be linked to this open Case.

Case details, including Unique Case Reference Number, Case status and MPAN.

Meter details. The current Supplier can amend the Confirmed On-Site MSN. Where this is amended, all Linked cases will have a note added to the timeline, detailing the change in MSN.

Current stakeholders involved in the Crossed Meters case. Attachments section will show any related attachments.



Obligation details – Where a question has been asked of the user then the obligation to respond will be highlighted, along with a deadline date for the response (5 Working Days). This will remain until a response has been sent.

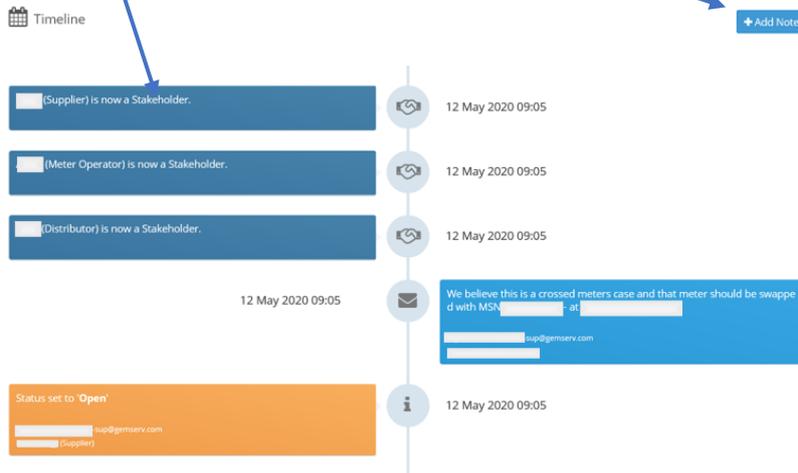
**+** Can be used when the user needs to add a new Meter to the case. Once added, all Linked cases will have a note added to the timeline, detailing the addition of the MSN.

The MSN cannot be deleted as the system is designed to prevent information in an investigation from being deleted.

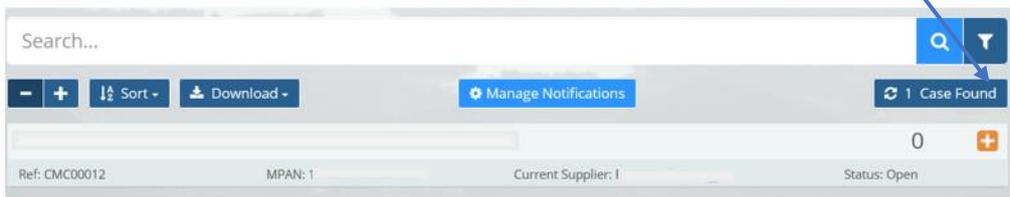
Audit details – This information is updated when a user or scheduled job changes the status, enters contact details, or adds a note. User details as well as the date of the change will show here.

A user can scroll further down on this page to view the Case Timeline. Including confirmation of the Stakeholders associated with that MPAN.

A user can use the [+Add Note](#) function to add a comment. This is covered further on this document and can be viewed [here](#).



Clicking return  at the top of the page the system will confirm 1 Case found for this MPAN.



A user can now enter that MPAN into the ECOES Search bar, and when selected they will see a note confirming that there is an active Crossed Meter Case against this MPAN. **NB:** only the current Supplier and associated Stakeholders will have visibility of this message.



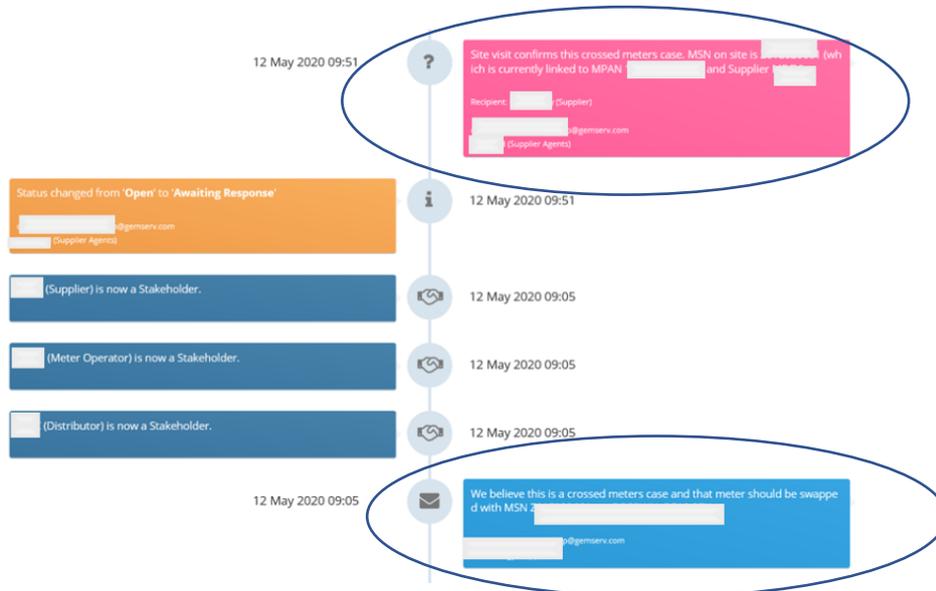
The MOP user will have visibility of this Case creation within the Crossed Meters dropdown under 'Processes'. The MOP can also view all applicable Crossed Meters cases within the Processes tab and will see a notification if the Supplier has raised a note for their attention.



An email will also be sent to all users within a specific Company Group (who has been given access to the functionality) whenever there is an unseen update to a Case (such as a new note added for their attention).

If the MOP user chooses to use the Crossed Meters functionality within ECOES to communicate with their Supplier, then at this stage they can open the Crossed Meters Case, scroll down to the timeline and view the details of the Case that was generated by the Supplier (shown below in blue). In the example below, the MOP has chosen to investigate via a Site Visit and updated the Supplier with a note confirming the MSN on site.

An attachment (for example, a picture of the meter confirming the MSN) may be added. Any notes from the MOP will be visible in the Case Timeline (shown below in pink)



## Obligations

An Obligation occurs when a question has been asked of the user. Adding a new note with a question for the recipient will start off the obligation. For example, if the MOP chooses to send a note to the Supplier with “Response Required” selected, the Case Status will change to ‘Awaiting Response’, and an obligation will be raised. Responding to a note will fulfil the obligation.

Case status now shows as ‘Awaiting Response’.

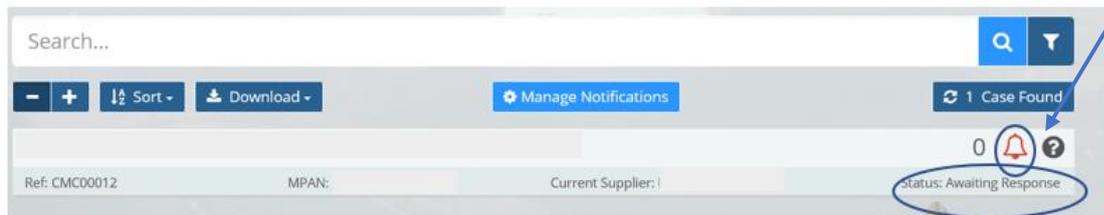
Meter Details section has not changed and cannot be edited by a MOP user.

Obligation Details now show 1 and confirm that the Supplier has 5 Working Days to respond to the MOPs message (which is shown above in pink).

This 'Awaiting Response' status will be visible to the Supplier user when they log on to ECOES. They will see this notification.

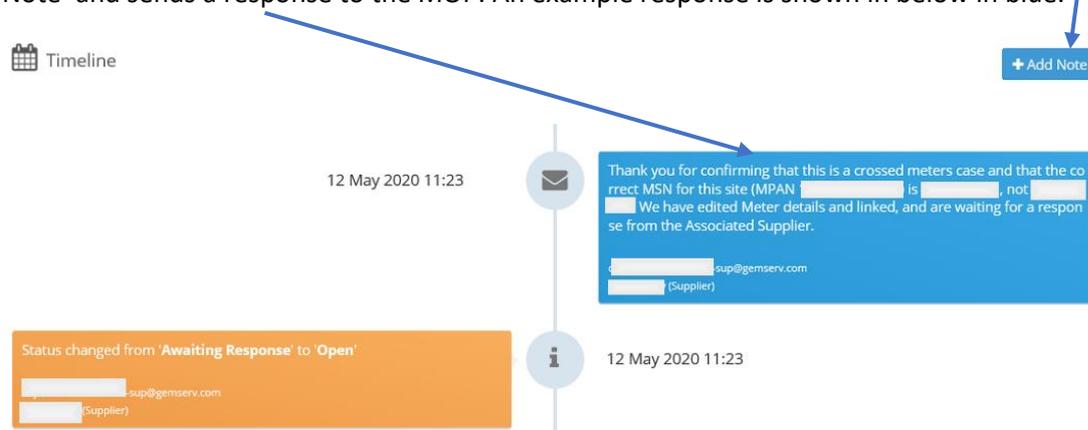


And when clicking into Crossed Meters, the Supplier user will see the status as 'Awaiting Response' and a red bell will be visible to confirm that the user has an obligation to respond to.

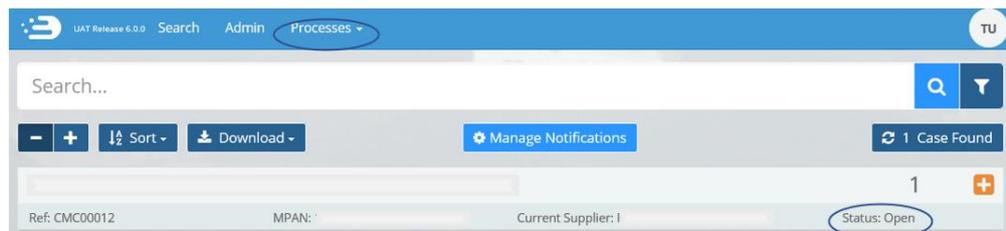


The Supplier user can also hover over the  to view obligation details. The bell highlights the obligation date deadline and the question mark confirms the status is 'Awaiting Response'. This will remain until a response has been given.

The obligation and 'Awaiting Response' status will change when the Supplier user clicks 'Add Note' and sends a response to the MOP. An example response is shown in below in blue.



Once the Supplier user sends their response, the notification number will disappear, and the Case Status will change to 'Open'.

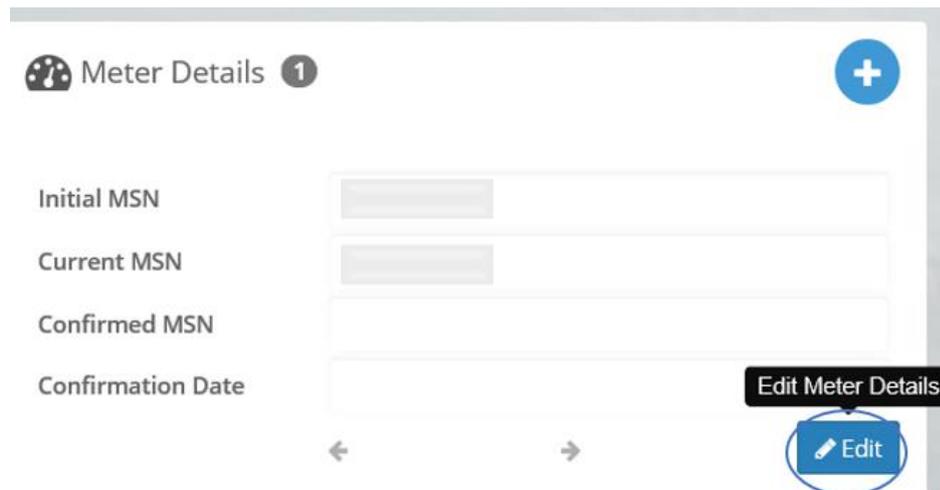


Further details on "Add a Note" can be found [here](#).

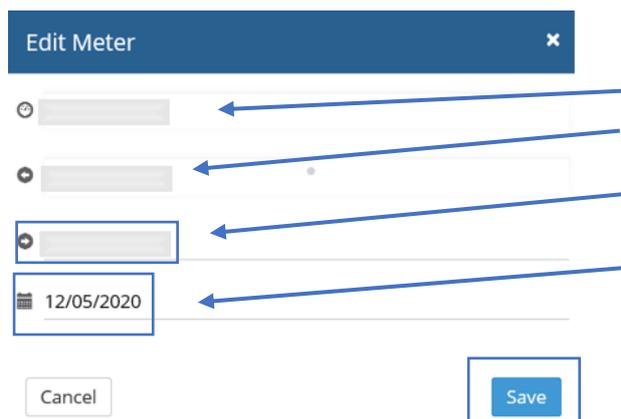
## Supplier Users Linked Cases

When a Supplier user receives confirmation that this is a Crossed Meters Case, whether this is via a note from the MOP using this ECOES portal (as in the example above), or any other method as agreed bi-laterally with their MOP (e.g. D0001/D0005, email...etc.) they will then edit the meter details accordingly within the Crossed Meter Detail page, to confirm that a different MSN is on site.

The Supplier user can perform a record search for the MSN that the MOP has provided and copy it from ECOES. The Supplier user should then return to their Case record and perform the MSN update.

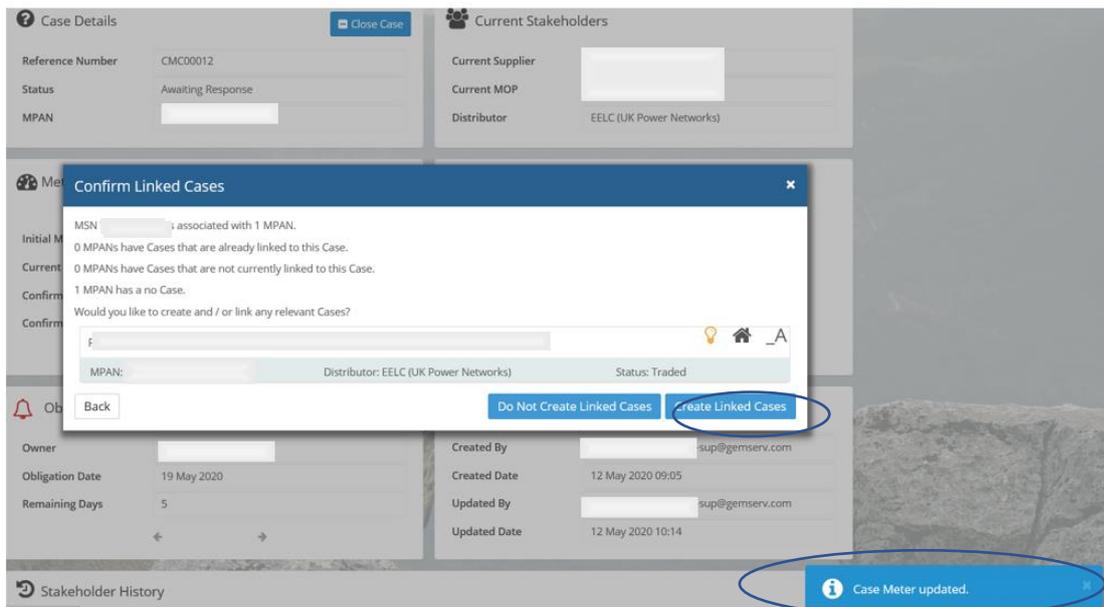


Click 'Edit' then a separate window will be available for the Supplier user to populate the MOP confirmed MSN and the date that this confirmation was received from the MOP (e.g. the Date of the Note, Data Flow or email from the MOP).



Initial MSN (cannot be modified).  
Current MSN (cannot be modified).  
Confirmed MSN (enter the newly confirmed MSN into here).  
Confirmation date (date of MOP confirmation of that MSN).

When the Supplier user clicks 'Save' (and providing that the 'Confirmed MSN' is a live, active MSN within ECOES) a new window will open to confirm that the Case meter is updated and will ask the Supplier user if they wish to create linked cases via a database look up. The Supplier user is notified that this updated 'Confirmed MSN' is associated with another MPAN and it will confirm the address of that associated MPAN.



If the Supplier user clicks on 'Create Linked cases', this will link the MPAN associated with the newly confirmed MSN to this Crossed Meters Case and create a Case on the Associated Suppliers MPAN, linking it to this one. Confirmation of this will be seen in the bottom right via a Blue 'pop up' confirming. i Linked Cases created.

The timeline will update automatically to confirm the linked Case.

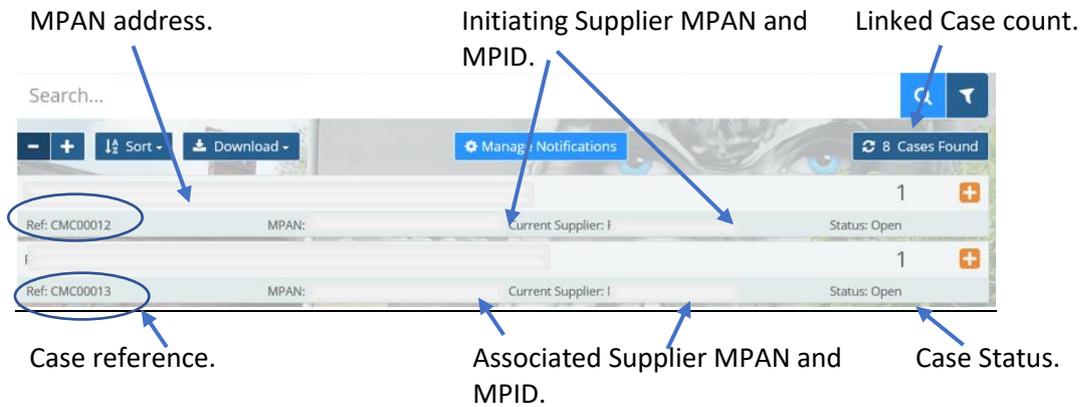


Creating a Linked Case will also notify the Associated Supplier that a Crossed Meters Case has been created and linked to their MPAN. An Associated Supplier user will then be able to see this notification when they next log in to ECOES. As a new, unseen Case has been created.

An email will be sent to all Users with the Crossed Meters System Function for that Company Group. The email will also contain details of any Case where the current Supplier has changed, and the gaining Supplier has yet to view the Case.

## Associated Suppliers

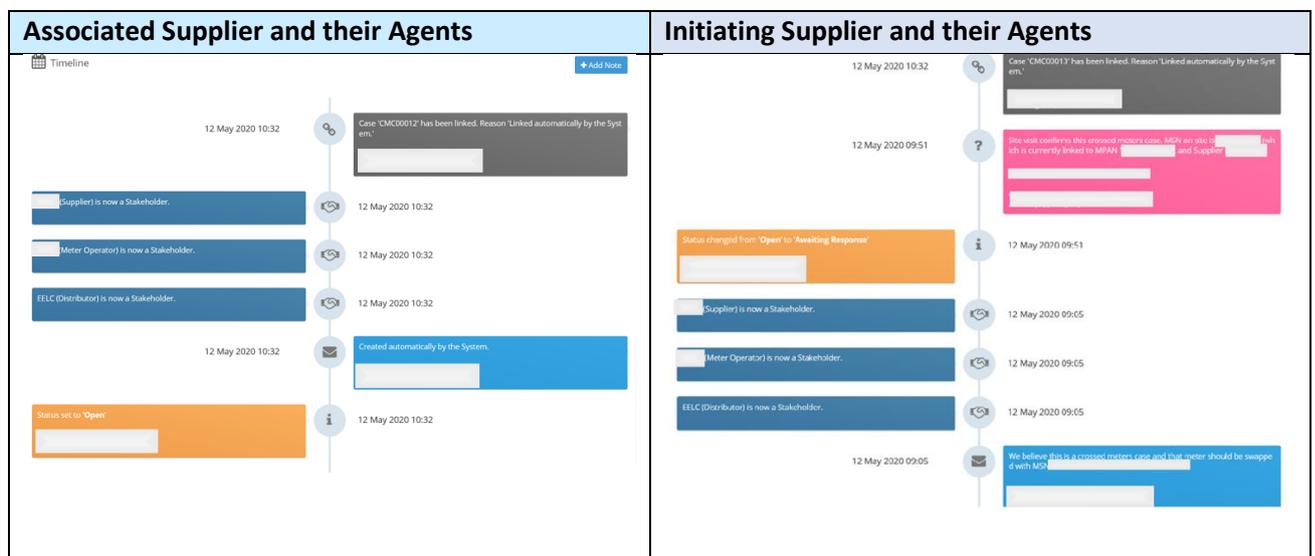
An Associated Supplier will be able to see their MPAN, alongside the other MPAN in the Crossed Meters Case List view (providing that their filter settings allow for this, as outlined [here](#).) Case links are bi-directional i.e. in the example below, CMC00012 is linked to CMC00013 then CMC00013 is linked to CMC00012.



Each Supplier user involved with the Linked Case can access the Timeline detail of all Linked Cases. Any actions and notes that the Initiating Supplier user or their Agent take, will be visible to the Associated Supplier user when they click into the address line for the MPAN belonging to the Initiating Supplier. Notes that have been marked Private will not be visible to all and will only be visible to the intended recipient Company Group. Likewise, the Initiating Supplier user can see any action that the Associated Supplier user takes. To see this, the users must click on the address line for the MPAN belonging to the Associated Supplier and view that timeline.

Apart from a notification that the cases are linked, the Timelines run independently. For example, within the Associated Suppliers record (Addresses relating to their own MPAN - CMC00013 above), they can see a high-level overview of actions taken. They can see that a Case was opened by the Initiating Supplier and then later linked to them – but they cannot see any of the finer details. To view the specifics, the user would need to click into the Initiating Suppliers record (Address relating to the Initiating Suppliers MPAN – CMC00012 above).

### Example of Timelines for each Supplier, at the stage that the Cases are linked/MSN updated



Once the Associated Supplier user has familiarised themselves with the details of the Case, they are required to investigate if this is a Crossed Meters situation.

In the example below, the Associated Supplier user has chosen to contact their MOP via the 'Add Note' function, which can be found within the Case record belonging to their MPAN. Each Supplier user will need to agree how they manage these communications bi-laterally with their MOP.

## Adding a Note



Within the Crossed Meters Case Details Screen, scroll down to the timeline and click on 'Add Note'. If an Associated Supplier user wishes to send a note to the Initiating Supplier, they need to do so via the 'Add Note' function within the Initiating Suppliers users MPAN Case record – and Vice Versa.

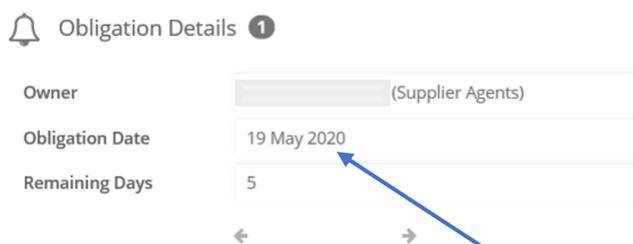
Clicking 'Add Note' will generate the 'Add Note' pop up, an example of this is seen below.

	<p>Content is mandatory and must be completed.</p> <p>The 'Requires Response' has been moved to Yes, which asks a question of the Recipient Company users and in this example will obligate the MOP to respond.</p> <p>The Recipient Company dropdown will need to be selected when asking a question.</p> <p>A note can be made private by changing this to 'Yes'. If Private, only the recipient and note creator company users will see the content of the note. The timeline will show the note is private.</p> <p>'Add Files' allows the user to add an attachment(s). A limit on the size of attachments sent in a single message is set to 10 MB</p> <p>Once complete, click 'Send' to send your note.</p>
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Once sent, a notification will pop up in the bottom right of the screen to confirm that a note has been added to the Case. The note will also be visible within the Associated Suppliers Timeline.

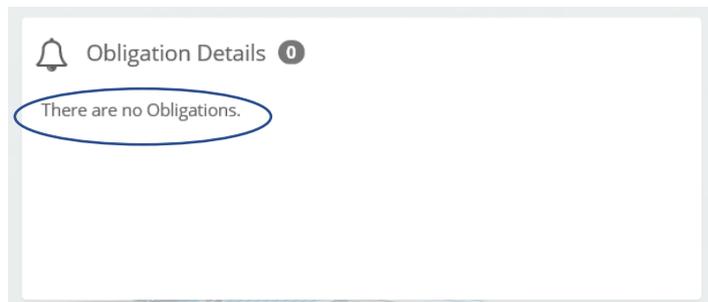


As the above example included sending a note with 'Requires Response' selected, the MOP will receive a notification and will be required to respond. Until the MOP users pick this up and respond, the Case Details status will be "awaiting response" and the Obligation Details within this MPAN will show a count of 1 (this number will increase if more than one message is raised with 'Requires Response' selected).



Obligation Date is the deadline for a response. If the request was for a site visit, it may not be possible to turn this around in 5 Working Days, so a response confirming a site visit will be booked or a note can be added confirming a discussion with the Supplier will be enough. Further notes can be added later – e.g. once the appointment has taken place.

The MOP sending a response via the 'Add Note' function will clear this obligation.



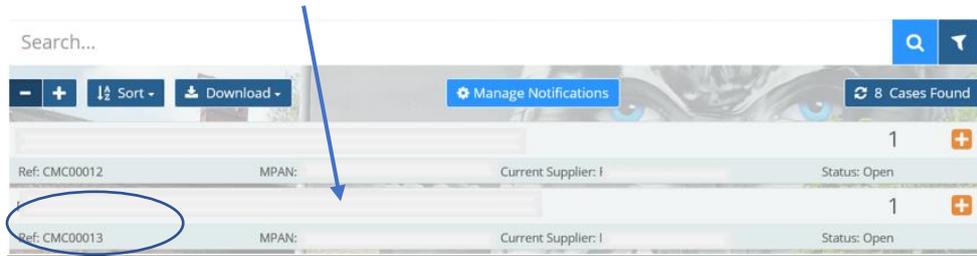
And change the status back to Open.



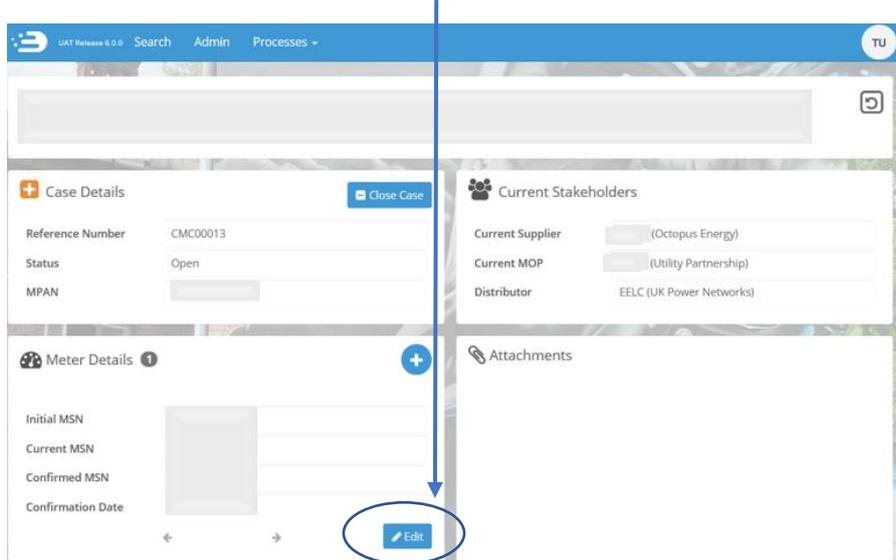
The MOP user's response will trigger a notification to the Associated Supplier users.

The Associated Supplier users can then go into the Case record and review the MOP's message. In this example, the MOP has confirmed that the meter on Site is the MSN that is currently listed in ECOES under the Initiating Suppliers MPAN, and so this is a Crossed Meters scenario. The Associated Suppliers users can now edit their own Meter details by selecting "Edit" under the Case Meter Details section of the Crossed Meter Case Detail screen.

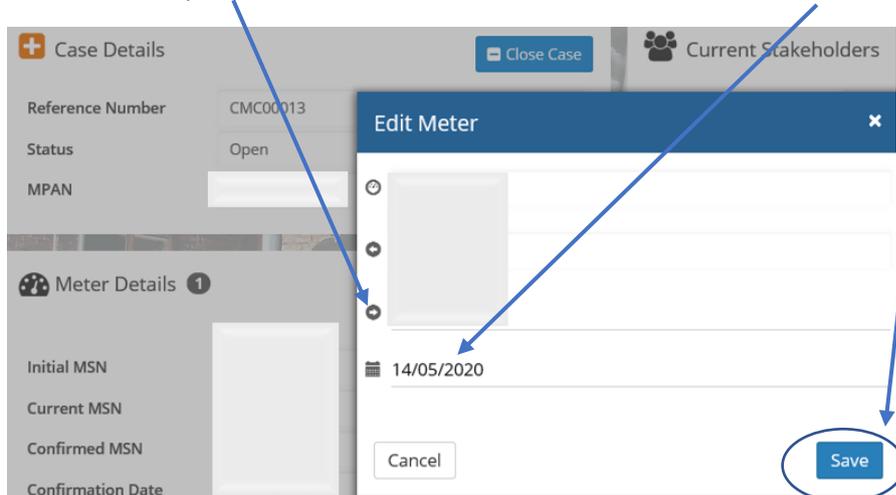
Select the relevant Case record to open the Case Detail screen.



Next, click 'Edit' within Meter Details.

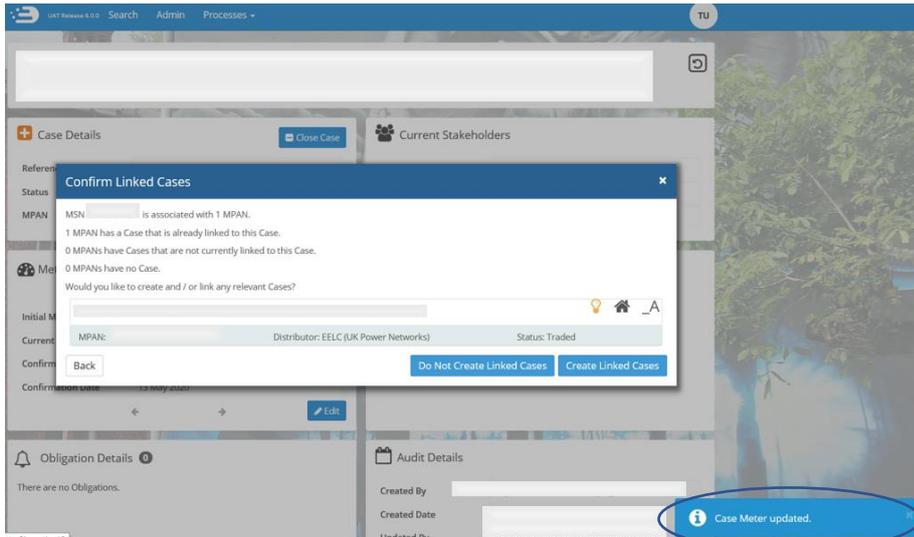


Enter the newly confirmed MSN and the date of the confirmation then click 'Save'.

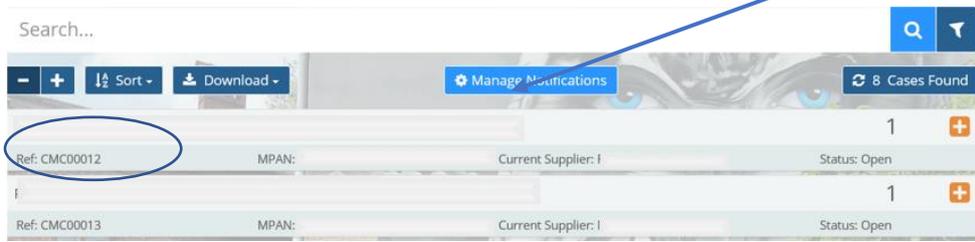


Once 'Save' is clicked, this will open a new window and prompt the Associated Supplier user to confirm if they wish to create a linked Case.

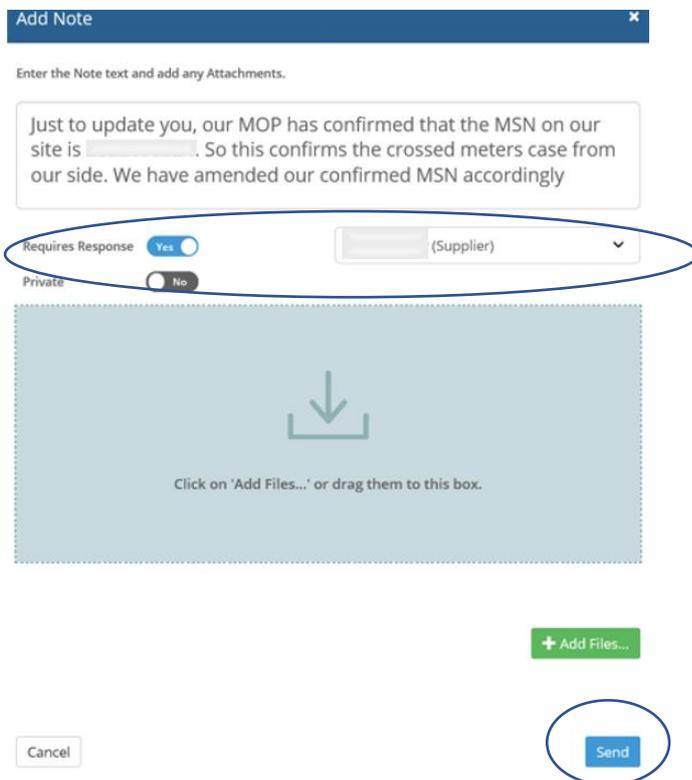
Clicking 'Create Linked Case' will do this and update the timelines accordingly.



The Associated Supplier user can then send a message to the Initiating Supplier user to confirm the actions that they have taken. To do this, they need to click into the Initiating Suppliers MPAN record.



and follow the steps for 'Add Note'. For example.



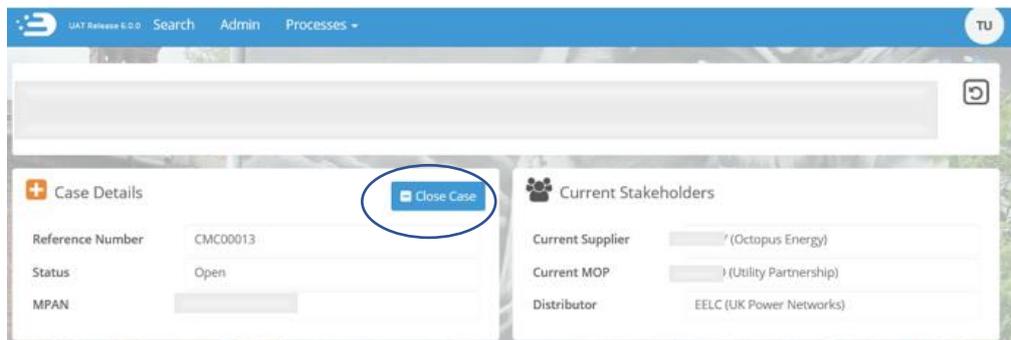
Once “Send” has been clicked, this note will be visible in the Initiating Suppliers users record timeline (CMC00012), and as ‘Requires Response’ was selected, this will create an Obligation for the Initiating Supplier user to reply.

As both Suppliers have confirmed the actual MSN’s on site, both the Initiating Supplier and Associated Supplier should see a change in their records for ‘Current MSN’ – this will be updated automatically by an overnight job for Active Cases.

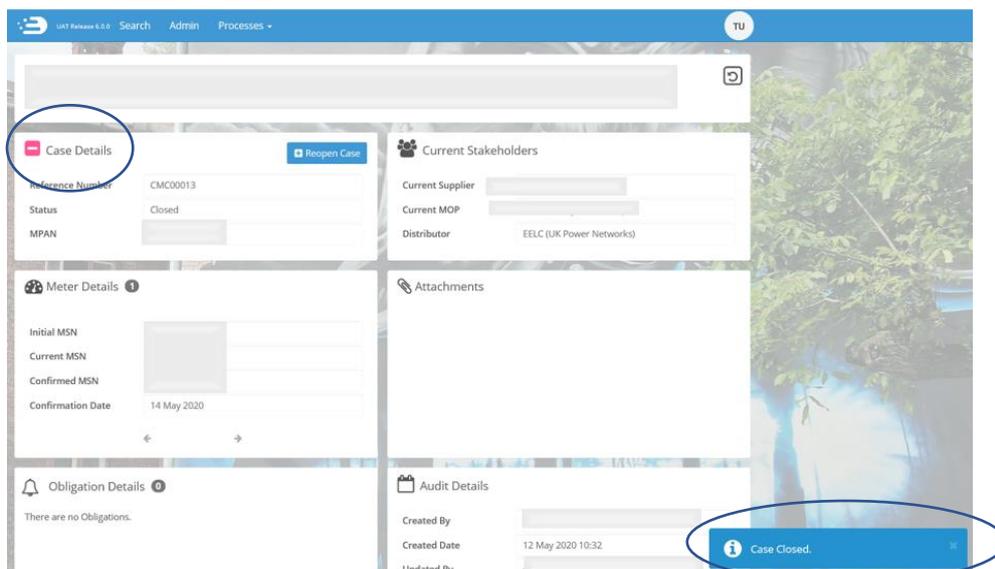


### Closing a Crossed Meters Case

Each Supplier user can close their side of the linked Case. They can do this by clicking the ‘Close Case’ within the Crossed Meter Case Detail screen



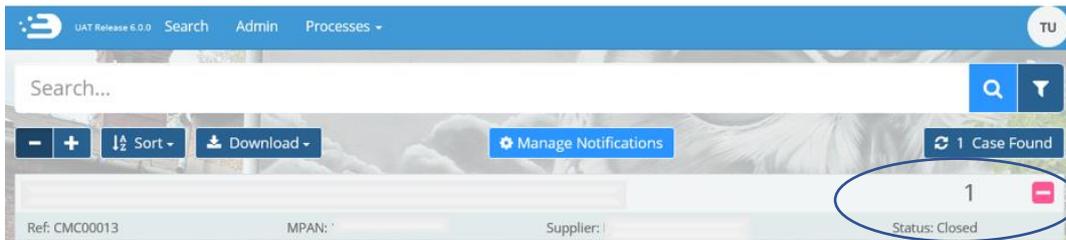
This will generate a pop-up notification confirming Case Closed, and the Case Details will now show the Closed Case Symbol .



The Timeline will also confirm the status change.

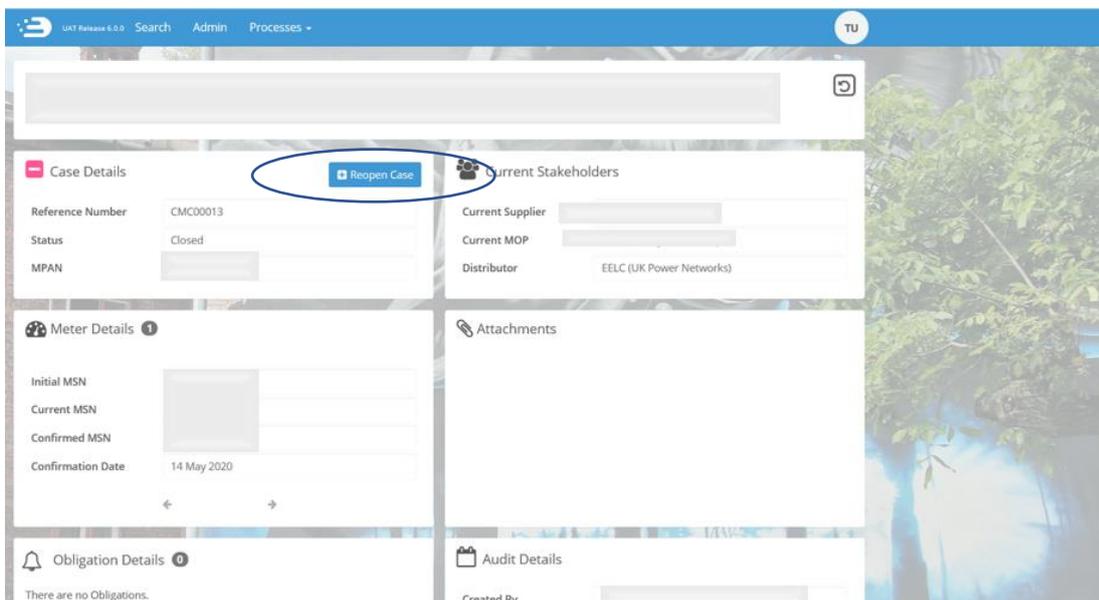


The Case will now show as 'Closed' within the Crossed Meter's Case list and all users will be able to see this, providing that their filters are set to show Closed Cases.

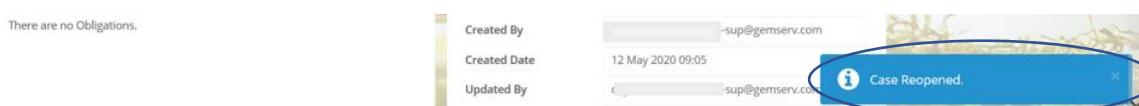


## Re-opening a Crossed Meters Case

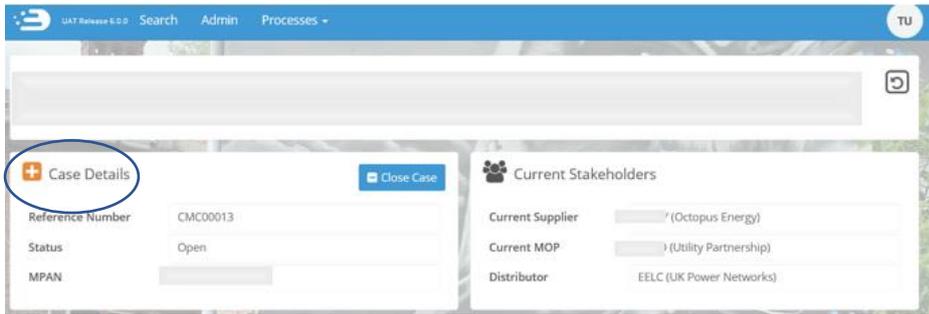
Each Supplier user can re-open their side of the linked Case. They can do this by clicking the 'Reopen Case' button within the Crossed Meter Case Detail screen. Only the current Supplier can re-open a Case for their own MPAN.



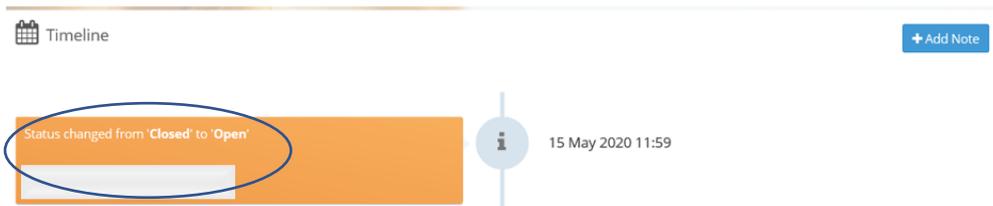
Once clicked, a 'pop up' will show on the bottom right to confirm 'Case Reopened'.



The Case Details will show the Open Case Symbol .



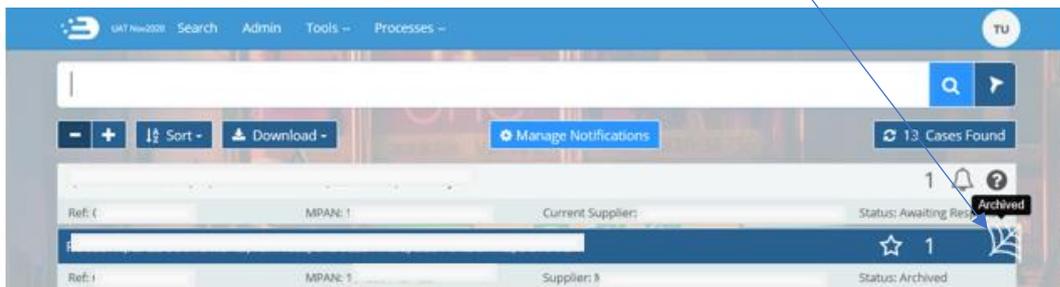
And the Timeline will confirm the status change.



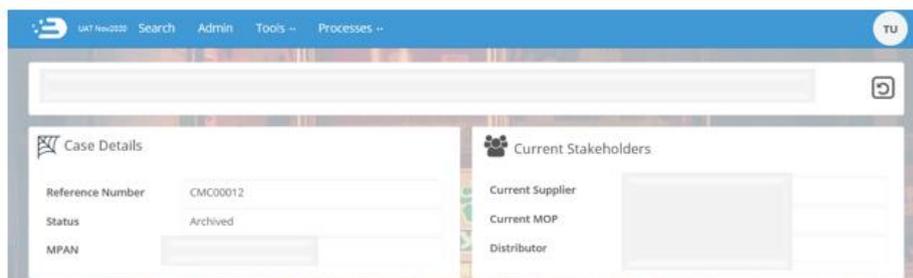
## Archived Crossed Meters Cases

A job will be run every day, (including weekends) to search for Cases with a 'Closed' status. Where a Case has been Closed for 30 Calendar Days it will be assigned an 'Archived' Flag. The status is not affected by the 'Archive Flag' but these Cases will be hidden by default from the Crossed Meter Case List screen. All Notes and Attachments will be irrecoverably deleted. The 'Case Detail' screen will show that the Note(s) and Attachment once existed, but the detail will be lost.

Archived messages will display a cobweb icon against them, like so.



And the Case Details within the Crossed Meters Case Details screen will also confirm 'Archived' within the status, by showing the cobweb icon and if you hover over the cobweb.



## Crossed Meter Notification Emails

The Crossed Meters Notification email job runs daily (including on weekends) and searches for cases created since the job was last run. If there are any cases created since the Job was last run that have yet to be viewed by the Case's current Supplier, then an email will be sent to all Users with the Crossed Meters System Function for that Company Group.

The email will also contain details of any Case where the current Supplier has changed, and the gaining Supplier has yet to view the Case.

## ICONS Found within the Crossed Meters Functionality

	Add New Note or Add New Meter		Back to search		Current Stakeholders		Attachments		Crossed Meters
	Search		Case Details		Meter Details		Obligation details		Filter
	Simple View		Linked Cases		Audit Details		Stakeholder History		Detailed View
	Download all attachments		Unseen updates to Linked Case		Unseen updates to Case		Timeline		Download attachment
	Open		Timeline – for information		Timeline - Notes		Timeline – Question asked.		Closed
	Delete Attachment		Link Case		Unlink Case		Edit Meter		Close Case
	Archived		Attachments pending virus scan		Timeline - Now a Stakeholder				