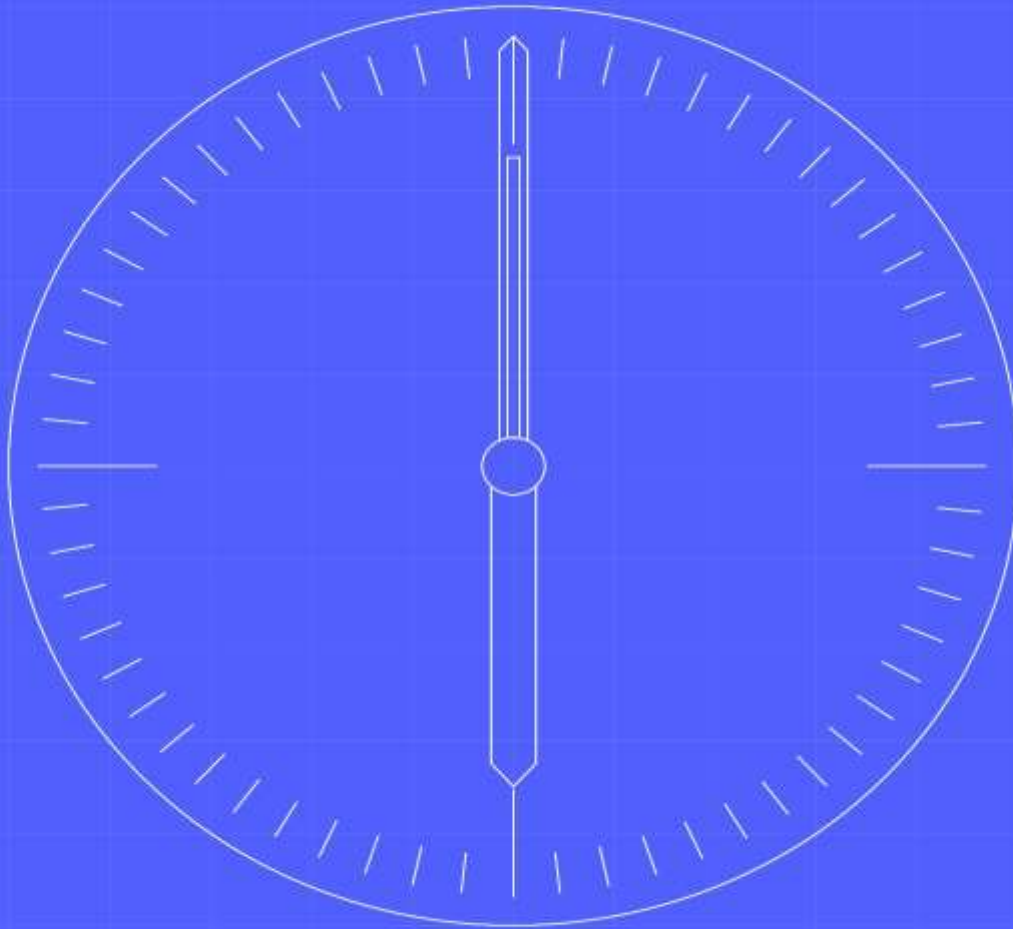


# [07] Migration Data Requirements and Reports



Document owner  
**Migration Team**  
Status:  
**Draft**

Document number  
**MHHS-DEL2764**  
Date  
**13 June 2024**

Version  
**0.1**  
Classification  
**Public**

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## 1.1 Change Record

Date	Author	Version	Change Detail
13/06/2024	Migration Team	v0.1	Migration Framework Industry Consultation 2

## 1.2 References

Document	Publisher	Published	Additional Information
REF-1 MHHS-DEL2426-[01] Migration Framework Foundations v1.1	Migration Team	13/06/2024	Migration FW
REF-2 MHHS-DEL2427-[02] Migration Framework - Principles and Guidelines v1.1	Migration Team	13/06/2024	Migration FW
REF-3 MHHS-DEL2428-[03] Migration Capacity Calculations - Method Statements v1.1	Migration Team	13/06/2024	Migration FW
REF-4 MHHS-DEL2429-[03a] Migration Capacity Calculations – Parameters v1.1	Migration Team	13/06/2024	Migration FW
REF-5 MHHS-DEL2430-[04] Migration Requirements and Processes – v1.1	Migration Team	13/06/2024	Migration FW
REF-6 MHHS-DL2431-[04a] Migration Business Process Models v1.1	Migration Team	13/06/2024	Migration FW
REF-7 MHHS-DEL2762-[05] Migration Choreography v0.1	Migration Team	13/06/2024	Migration FW
REF-8 MHHS-DEL2763-[06] Migration Governance and Escalation Framework v0.1	Migration Team	13/06/2024	Migration FW
REF-9 MHHS-DEL2764-[07] Migration Data Requirements and Reports v0.1	Migration Team	13/06/2024	Migration FW
REF-10 MHHS-DEL961 – Migration Design Document v1.3	Migration Team	03/04/2023	
REF-11 MHHS-DEL953 – Data Assessment Report V1.0	Migration Team	21/02/2023	
REF-12 MHHS-DEL1128 – Migration, Cutover and Data Strategy v1.0	Migration Team	02/06/2023	
REF-13 MHHS-DEL1648 - Migration Thresholds Document v1.0	Migration Team	20/11/2023	
REF-14 MHHS-DEL813 – Overarching Test Data Approach and Plan V1.0	Testing Team	19/07/2023	
REF-15 MHHS-DEL1181 – Data Cleanse Plan v2.1	Migration Team	04/06/2024	
REF-16 MHHS-DEL1792 - M15 Acceptance Criteria v1.0	Migration Team	13/12/2023	

## 1.3 Terminology

Term	Description
BAU Process	This refers to a process within the MHHS arrangements as set out within the MHHS Core Design.
BSC	Balancing and Settlement Code
Central Services / Systems	MHHS Programme term referring to the parties and systems that comprise the supporting infrastructure for MHHS business processes and services, namely the Exelon Central Services, Electricity Enquiry Service, Data Service Provider, Central Switching Service, Data Transfer Network, and the Data Integration Platform.
CoA	Change of Agent
CoS	Change of Supplier
CSS	Central Switching Service
Daily Planned Migration Threshold	This is an industry-wide limit on the maximum planned for number of migrations that can take place on a given day under normal circumstances.
Data Cleanse Plan	The approach and activities required to improve and populate data prior to Migration start.
DC	Data Collector
DIP	Data Integration Platform

<b>Term</b>	<b>Description</b>
DS	Data Service
DSP	Data Services Provider
ECS	Elexon Central Services
EES	Electricity Enquiry Service
Export MPAN	An MPAN that exports energy to the grid from a premises.
Forward Migration	The process through which MPANs will move from legacy arrangements to MHHS arrangements.
IDNO	Independent Distribution Network Operator
Import MPAN	An MPAN that imports energy from the grid to a premises
ISD	Industry Standing Data
LDSO	Licensed Distribution System Operator
LDSO Portfolio Thresholds	Limits set for each LDSO based on the size of their portfolio, ensuring balanced migration across different operators See MHHS-DEL1648 - Migration Thresholds Document v1.0
Legacy Arrangements	The existing arrangements set out under the BSC and REC. For the purposes of the Migration Design, this is primarily the REC Metering Services Schedule and the Balancing and Settlement Procedures related to Data Collection.
MCC	Migration Control Centre
MHHS	Market-Wide Half-Hourly Settlement
MHHS Arrangements	The new MHHS arrangements as set out in the MHHS Core Design Artefacts.
Migration Design	The technical articulation of how MPANs will move from legacy to new MHHS arrangements. See MHHS-DEL961 – Migration Design Document v1.
Migration Period	The period denoted by the Programme as occurring between the M11 and M15 milestones.
Migration Planning and Management Tool (MPMT)	Application to be developed for use by the MCC to manage the end to end migration process
MOP	Meter Operator
MPAN	Meter Point Administration Number
MPID	Market Participant Identifier
MS	Metering Service
MWG	Migration Working Group
NFR	Non-Functional Requirement
Primary MPAN	The MPAN, within a Related MPAN arrangement, for which a Switch is initiated, or a forward migration (via an IF-031) is initiated.
Qualified Supplier	A Supplier recognised in ISD as both having passed the relevant BSC qualification requirements; and declared that their service is operational within the MHHS arrangements.
Registration Service	The Registration Service is the LDSO service that holds Meter point standing data information about each MPAN within its Distribution Region. Data includes the BRP the processing and metering services appointed to the MPAN. It also includes information on the type of customer, the Measurement Class, Energisation Status and Line Loss Factor Class.
REC	Retail Energy Code
Reverse Migration	The process through which MPANs will move from MHHS arrangements to legacy arrangements.
Secondary MPAN	The MPAN, within a Related MPAN arrangement, for which a forward migration occurs when an IF-031 is received for a Primary MPAN.
Switch	The process by which a new Supplier Registration supersedes an existing Supplier Registration, managed by the CSS.
Upper Migration Threshold	This is an industry-wide limit on the maximum number of migrations that can take place on a given day under exceptional circumstances. See MHHS-DEL1648 - Migration Thresholds Document v1.0
Supplier Capacity Envelope	A daily profile covering the whole migration period detailing the maximum number of migrations a given Supplier in a LDSO may undertake.

Term	Description
(Envelope)	This also includes the submission rules for a Supplier's deminimus category submissions.
Supplier Submission	A Supplier's forward view of planned migrations at LDSO level that falls within the Supplier Capacity Envelope provided and includes all MPANs within their portfolio.

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## 2 Introduction

### 2.1 Purpose of the Document

This document sets out the Data Requirements for the Migration Control Centre (MCC) and the Migration Planning Management Tool (MPMT).

This document outlines the Data Requirements for the Migration Control Centre (MCC) and the Migration Planning Management Tool (MPMT), as well as providing a view of the external Migration Report Catalogue.

It seeks to ensure that the MCC and Industry Stakeholders have the necessary data and reporting capabilities to monitor, manage, and control the MHHS migration effectively.

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### 2.2 Overview

#### 2.2.1 Data Requirements

The Data Requirements section aims to:

- Identify key data sources and reports that will serve as inputs for the MCC and MPMT
- Ensure the accuracy and completeness of reference data used by the MCC and MPMT
- Understand additional data requirements to support the development of the MCC and MPMT

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#### 2.2.2 Reporting Catalogue

The Reporting Catalogue section seeks to:

- Specify the structure and classification for Migration reports
- Identify reports timings and high-level content, and purpose
- Provide an opportunity for stakeholders to offer feedback and opinions
- Support a MCC Principle of continuous monitoring and improvement of the migration process
- Present a core set of Migration Reports that can be iteratively enhanced during the active migration window

We acknowledge that additional Migration insights and requirements may emerge through consultation and operational experience

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## 3 Objectives

The Migration Team aims to achieve the following objectives:

### 1. Identify Sources and Types of Data

Determine the data sources and other information including other Party reports that the MCC will need to Monitor, Manage and Control the MHHS migration.

### 2. Clarify Key Reports

Provide an overview of essential reports that parties can expect from the MCC, with key data items and expected frequency

### 3. Avoid Reporting Duplication

Ensure that MCC reporting complements the MHHS Programme and does not result in duplication of effort or information where practical.

### 4. Develop and Confirm Reports

Once we establish the high-level report definitions, we will further refine the structure and data to assist parties in their planning and process development..

### 5. Feedback and Adaptation

Acknowledge that this list of reports is an important starting point and remains open to feedback to address additional requirements concerning data and frequency.

The Migration Team is committed to producing information that supports the Migration Framework principles and ensures clarity for all parties involved in the migration execution.

By collaborating with industry stakeholders, the team aims to create a reporting framework that meets the evolving needs of the MHHS migration processes.

## 4 Data Requirements

The Migration Team have identified the following data sources and inputs required for the Migration Framework and Reporting Suite:

#	Source / Input	Description	Example Entities / Data Items
DR-01	Industry Standing Data (ISD)	Data defining market participants and roles.	ISD Entities: <ul style="list-style-type: none"> <li>Entity Id 1 - Market Participant Organisation</li> <li>Entity Id 4 - SMR Agent Appointment</li> <li>Entity Id 21 - Market Role</li> <li>Entity Id 45 - Market Participant Role</li> <li>Entity Id M16 - Market Participant to DIP Participant Mapping</li> <li>Entity Id M18 - DIP Market Roles</li> </ul>
DR-02	Electricity Enquiry Service (EES)	Supplier portfolio counts for each supplier within each LDSO region.	Supplier Portfolio Counts for each Supplier within each LDSO Region
DR-03	Data Integration Platform (DIP)	Messages and events supporting migration.	Message Data: <ul style="list-style-type: none"> <li>IF-001/PUB-001 Notification of Change of Supplier</li> <li>IF-003/PUB-003 Notification of Reverse Migration and De-Appointment</li> <li>IF-031/PUB-031 Supplier Service Provider Appointment Request</li> <li>IF-032/PUB-032 Supplier Service Provider Appointment Request Response</li> <li>IF-034/PUB-034 Service Provider Appointment Request Response</li> <li>IF-035/PUB-035 Registration Service Appointment Status Notification</li> <li>IF-036/PUB-036 Service Provider Notification of Appointment</li> </ul> <p>NOTE The Programme may also wish to track the first instance of the IF-021/PUB-021 to confirm if the migrated MPAN can settle on the new arrangements, this will most likely form a part for the assurance activities.</p>
DR-04	Programme Party Coordinator (PPC)	The MHHS Programme body that coordinates and collects Programme Party data.	<ul style="list-style-type: none"> <li>Target MPIDs for Suppliers within each LDSO Region</li> <li>Confirmed Migration Start dates for qualified MHHS Suppliers and Agents.</li> </ul>
DR-05	Operational Inputs to the Migration Planning and	Inputs for managing the MHHS migration. To be used by the MPMT.	<ul style="list-style-type: none"> <li>Scaling factors</li> <li>De-minimus Thresholds</li> <li>Escalation Tolerances</li> <li>Operational Incident Reporting: <ul style="list-style-type: none"> <li>Suppliers, Agents, SMRS/ LDSOs, DCC and CSS</li> </ul> </li> </ul>

	<b>Management Tool (MPMT)</b>		
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## 5 Report Categories

#	Category	Definition	Data Items	Notes
RC-01	Industry and Party Data	Tracking data for various participants	<ul style="list-style-type: none"> <li>Supplier Status</li> <li>LDSO Status</li> <li>Service Provider Status</li> </ul> <p>MDD Data extracts combined with MHHS Programme gathered data including:</p> <ul style="list-style-type: none"> <li>Current Participant Roles</li> <li>MPID</li> <li>Effective dates</li> </ul>	<ul style="list-style-type: none"> <li>MDD Data extracts should be regularly updated to ensure accuracy.</li> <li>Timing of MDD refresh and MCC Envelope/Reports production important</li> </ul>
RC-02	Supplier and Service Provider Portfolio Data	Secure reports showing MCC view of portfolios for suppliers	<ul style="list-style-type: none"> <li>Supplier-only individual reports</li> <li>LDSO MPID Level Portfolios</li> </ul>	<ul style="list-style-type: none"> <li>Data used by MPMT to define allocations at the MPID Level.</li> <li>Timing of EES refresh and MCC Envelope/Reports production issue important</li> </ul>
RC-03	MPAN Counts	Distribution of MPANs between LDSOs	<ul style="list-style-type: none"> <li>Aggregate view of MPANs by LDSO</li> <li>List of Suppliers with portfolios by LDSO</li> </ul>	<ul style="list-style-type: none"> <li>Provides view of Market wide distribution and management of MPANs in relation to migration progress and future migration demand and activity.</li> </ul>
RC-04	Plan vs Actual	Comparison of planned vs actual migration submissions	<ul style="list-style-type: none"> <li>Submitted Daily Migration Plans for Sprint Execution</li> <li>Actual migration submissions and completions, errors</li> </ul>	<ul style="list-style-type: none"> <li>Used to track and manage deviations from planned migrations</li> </ul>
RC-05	Transaction Reporting	Views of transaction initiation and completion	<p>Aggregate views of:</p> <ul style="list-style-type: none"> <li>IF-031/PUB-031 initiated</li> <li>IF-036/PUB-036 completed</li> </ul> <p>Summary views of all related migration message submissions/completions/errors</p>	<ul style="list-style-type: none"> <li>Supports tracking of migration-related transactions and related appointments</li> </ul>
RC-06	General MI Reporting	Reports for trend analysis and migration issue identification	<ul style="list-style-type: none"> <li>Various reports to support trend analysis and identify migration issues</li> </ul>	<ul style="list-style-type: none"> <li>Used for monitoring overall migration performance and identifying potential problems.</li> <li>Allow MCC to make strategic decisions based on data.</li> </ul>
RC-07	Operational Reports	Day-to-day migration management and tracking issues	<ul style="list-style-type: none"> <li>Central Services</li> <li>Registration Services</li> <li>LDSOs</li> <li>Supplier</li> <li>Agents/Service Providers</li> <li>Settlement Services</li> </ul>	<ul style="list-style-type: none"> <li>Used for the daily operational management of the migration process and identifying issues</li> <li>Provide overall system /ecosystem health status</li> <li>Dependant on MHHS Programme Service Management processes and tools</li> </ul>



## 6 Reporting Catalogue

#	Report Name	Report Category	Report Description	Data Items	Report Consumers	Expected Frequency
RP-01	Migration Party Tracking and Status	Industry Data and Party Readiness	Tracks the status of suppliers, LDSOs, and service providers, including development progress, qualification, and service activation with lead-time to planned migration start dates.	<ul style="list-style-type: none"> <li>Party Status (Suppliers, Central Services, Registration Services, LDSOs, Service Providers)</li> <li>PIT/SIT Progress</li> <li>Qualification Progress</li> <li>Service Activation Progress Dates</li> <li>Planned Migration Start Dates (RAG status)</li> <li>Blockers</li> </ul>	<ul style="list-style-type: none"> <li>MCC</li> <li>MHHS Programme Managers</li> <li>Suppliers</li> <li>LDSOs</li> <li>Service Providers</li> </ul>	Monthly
RP-02	Supplier Portfolio Data (MCC Snapshot)	Industry Data	Secure individual supplier reports on MCC's view of portfolios used by MPMT to define allocations (MPID Level). Includes numbers of MPANs, meter point types, and expected service provider migration volumes.	<ul style="list-style-type: none"> <li>MPID, Market Role</li> <li>LDSO-Supplier Shares</li> <li>MPAN Counts, Meter Point Types</li> <li>Expected Migration Volumes</li> <li>Supplier MPID Groups</li> <li>Supplier – Service Providers relationships</li> </ul>	<ul style="list-style-type: none"> <li>MCC</li> <li>Suppliers ONLY</li> </ul>	Monthly Also included with Supplier Envelopes
RP-03	Aggregate Migrated MPAN Distribution by LDSO	MPAN Counts	Aggregate view of the distribution of MPANs between LDSOs. List of suppliers with portfolios by LDSO.	<ul style="list-style-type: none"> <li>MPAN Counts (Migrated, Non-Migrated, in valid Migration Status)</li> <li>List of Supplier MPIDs per LDSO with view of Supplier Portfolio at a macro level e.g. <ul style="list-style-type: none"> <li>Supplier meets Envelope Criteria for LDSO</li> <li>Supplier meets Deminimus Criteria</li> <li>LDSO meets Deminimus Criteria</li> <li>Supplier has no migration portfolio in LDSO</li> </ul> </li> <li>List of Suppliers by LDSO MPID with Complex Sites and remaining Portfolios to be Migrated</li> </ul>	<ul style="list-style-type: none"> <li>MCC</li> <li>LDSOs</li> <li>Suppliers</li> <li>Central Services</li> <li>Registration Services</li> </ul>	Monthly Also included with Supplier Envelopes
RP-04	Supplier Submitted Migrations Plan vs Actual Migration Outturn	Plan vs Actual	Comparison of submitted daily migration plans for sprint execution versus actual migration initiations and completion messages.	<ul style="list-style-type: none"> <li>Daily Migration Plans</li> <li>Actual Migration Initiations and Completions</li> <li>MCC Identified deviations including Threshold breaches</li> </ul>	<ul style="list-style-type: none"> <li>MCC</li> <li>Suppliers</li> </ul> <p>TBC if required-Summary/ Aggregated sanitized views for other Participants e.g. Central Services</p> <ul style="list-style-type: none"> <li>Registration Services</li> <li>LDSOs</li> </ul>	Daily for MCC and Suppliers Weekly for Aggregate Views for other PPs

#	Report Name	Report Category	Report Description	Data Items	Report Consumers	Expected Frequency
RP-05	Migration Message / Transaction Summary	Transaction Reporting	Aggregate views of IF31 initiated versus IF36 completed. Summary views of all related migration message submissions.	<ul style="list-style-type: none"> <li>IF-001 / PUB-001 Notification of Change of Supplier</li> <li>IF-003/PUB-003 Notification of Reverse Migration and De-Appointment</li> <li>IF-031/PUB-031 Supplier Service Provider Appointment Request</li> <li>IF-034/PUB-034 Service Provider Appointment Request Response</li> <li>IF-035/PUB-035 Registration Service Appointment Status Notification</li> <li>IF-036/PUB-036 Service Provider Notification of Appointment</li> <li>Aggregate views of IF31 initiated versus IF36 completed.</li> </ul> <p>Summary views of all related migration message submissions.</p> <ul style="list-style-type: none"> <li>Correlated Message Submission Summary</li> <li>Exception Rates / Error Rates</li> <li>Migration Thresholds vs Submissions</li> </ul>	<ul style="list-style-type: none"> <li>MCC</li> <li>Suppliers</li> </ul> <p>TBC</p> <ul style="list-style-type: none"> <li>Service Providers / Legacy Agents</li> </ul> <p>TBC if required-Summary/ Aggregated sanitized views for other Participants e.g.</p> <ul style="list-style-type: none"> <li>Central Services</li> <li>Registration Services</li> <li>LDSOs</li> </ul>	<p>Daily for MCC and Suppliers</p> <p>Weekly Aggregate Views for other PPs</p>
RP-06	Migration Trend Analysis	General MI Reporting	Reports to support trend analysis and identify nascent, emerging migration risk and issues.	<ul style="list-style-type: none"> <li>Trend Data</li> <li>Migration Risk and Issues</li> <li>Historical Comparisons</li> </ul>	<ul style="list-style-type: none"> <li>MCC</li> <li>Code Bodies</li> <li>MHHS Programme Managers</li> </ul>	Monthly
RP-07	MCC Operational Migration Dashboard	Operational Reports	Consolidated view of various Operational reports for day-to-day migration management, tracking issues and potential issues related to the performance and operations of: <ul style="list-style-type: none"> <li>Central services</li> <li>Registration services</li> <li>LDSOs</li> <li>Suppliers</li> <li>Legacy Agents</li> <li>Service providers</li> <li>Elexon</li> <li>Etc.</li> </ul>	<ul style="list-style-type: none"> <li>Migration related Operational Issues</li> <li>Migration Systems Operational Status</li> <li>Migration Parties Operational Status</li> <li>Migration Party ecosystems and dependencies</li> <li>Mean-Time to Recovery</li> <li>Mean Time between Failures</li> </ul>	<ul style="list-style-type: none"> <li>MCC, MHHS Programme Managers</li> <li>All relevant and impacted PPs identified at incident /issue occurrence</li> </ul>	<p>Real-time</p> <p>Daily Summary</p> <p>Weekly / Monthly Trends</p>