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SPECIAL REC ISSUES GROUP – SDEP III CHANGE PROPOSAL R0122

MEETING NOTES

DATE	**24 November 2023, 10:00**
LOCATION	**By teleconference**

1 INTRODUCTIONS

The Chair welcomed attendees to this special meeting of the REC Issue Group (RIG), which was arranged to consider the reporting elements of SDEP III Change Proposal R0122.

The Chair confirmed the agenda, asking for Any Other Business (AOB) to be raised at this time. The Chair highlighted that no AOB items were raised prior to the meeting, with no AOB items being raised at this time.

2 R0122 – USEABILITY, LOOK AND FEEL AND REPORTING (REPORTING FOCUS OF RECRIG_23_2411)

The Code Manager Lead Analyst provided an overview of R0122 – Useability, Look and Feel and Reporting (Reporting focus of RECRIG_23_2411), which can be found on slides 2-10 of the pack here.

The Code Manager Lead Analyst asked RIG members what their preferred reporting types would be, choosing from Raw Data, Customised Reports and Standard Reports. The first reporting type to be discussed is Raw Data.

A RIG member commented previously parties thought the raw SDEP data was a good approach. The RIG member elaborated this allows parties to use it in a way which will enable them to meet their own objectives. The RIG member further elaborated that the sizing for the Raw Data might cause an issue, and the parameters will need to be agreed. Another RIG member agreed that the best approach would be to enable parties to meet their own objectives by scrutinising the raw data they receive.

Another RIG member asked if the reporting would show which user has raised the SDEP case and who it's been allocated to. The Code Manager Lead Analyst noted this can be added into the requirements if parties will find it useful. The Code Manager Lead Analyst

highlighted the assumption would be all of the data items are included, but they can confirm if there would be any data items which could prove difficult to include.

Another RIG member advised the improvements in the reporting would help them manage cases internally within their own business. The RIG member elaborated to be able to see what cases are outstanding, what cases are potentially nearing the day five SLA and the Contract Manager queries would be useful. The RIG member further elaborated this would help manage the customer better.

Another RIG member asked if this reporting suggestion will cover both crossed meters and secure communication cases. The Code Manager Lead Analyst explained this would cover the secure communication module only.

Another RIG member commented that without clicking into a Contract Manager escalation, it doesn't show what process it is for. Another RIG member confirmed unless it is specified in the title, it's hard to know what process they are for without opening them. The RIG member elaborated some cases are put into the Contract Manager queue due to users not knowing which other queue to select. The RIG member further elaborated this makes it difficult to identify who needs to work the specific case, as there is no other process queue it can be allocated to. The Code Manager Lead Analyst advised system solutions haven't been identified for these processes, however the guidance documents can be updated to show it's good practice to put the nature of the query in the title of the case.

Another RIG member highlighted the reports are pulled in real time. The RIG member elaborated this potentially causes confusion if users pull reports for the same time period, but at different times of the day. The RIG member commented it would be useful if for particular reports they remained static, no matter what time they have been run. The Code Manager Lead Analyst explained it might be useful if the raw data extract is shared between colleagues, which would mean everyone is looking at the same data. The Service Provider representative mentioned this could prove difficult to implement, but it should be kept as a problem statement which can be added to the requirements.

The Code Manager Lead Analyst asked RIG members for their thoughts on the 'Customised Reports' reporting option.

A RIG member commented they would prefer the 'Raw Data' reporting option. The RIG member advised this would be more beneficial to help them identify that the right escalations are being allocated to the right teams. Several RIG members agreed with this comment. Following this discussion, the preferred reporting option seemed to be 'Raw Data', as opposed to 'Customised Reports'.

The Code Manager Lead Analyst asked RIG members for their thoughts on the 'Standard Reports' option.

A RIG member asked if these reports would incorporate the suggestions from the previous sessions. The Code Manager Lead Analyst confirmed this to be the case.

Another RIG member mentioned they would find it useful if these reports included the user who sent the first response for a case. The RIG member advised you can then email the user directly, which can prompt a response.

Another RIG member noted on the Detailed Level report, it includes a 'total messages' field. The RIG member interpreted this as a number to show users how long the particular SDEP conversation was, which doesn't tell a user what each individual message contains. The RIG member advised it would be useful when interpreting this data to see the messages which have been included in the case. The Code Manager Lead Analyst mentioned a sample report could be drafted, which will include one or two rows of data to show what the report would look like. The Service Provider confirmed this would be an easy thing to do, once the requirements are agreed on.

Another RIG member commented it would be useful in the reporting, if the Contract Manager escalation linked to the original SDEP case. The RIG member advised often Contract Manager General Query cases can be raised, but the original SDEP case can't be identified and passed on accordingly. Another RIG member agreed with this, advising they spend a long period of time trying to find the original case, once it has been escalated to them as the Contract Manager. Another RIG member highlighted it was previously discussed that users can take an existing SDEP case and convert it into a Contract Manager case. The RIG member elaborated this will transfer all of the data across from the original to the Contract Manager escalation. Several RIG members agreed this would be useful to introduce into SDEP. The Contract Manager Lead Analyst confirmed this will be picked up and investigated to see if it can be introduced.

The Code Manager Lead Analyst asked RIG members for their thoughts on the users who should have the permissions set up to allow them to access the reports. A RIG member asked how the permissions will be restricted and if there was a limit to the number of users per organisation who can access the reports. Another RIG member confirmed there are no limits in place.

Another RIG member asked if the reports can be run by MPID. Several RIG members agreed this would be a useful approach. The Code Manager Lead Analyst confirmed this will be picked up and investigated to see if it can be introduced.

Another RIG member asked if there was a timeline for when the consultation will be issued and for when the functions will be implemented into SDEP. The Code Manager Lead Analyst confirmed as they are Change Proposals, this is going through the standard Impact Assessment process. The Code Manager Lead Analyst advised a report will then be drafted which will be issued for consultation, and the implementation data will be agreed on when the workload is identified.

No other business was discussed, the Chair thanked attendees for their input and closed the meeting.