USER GUIDE

For Metering Equipment Managers / Supplier Agent Users

How do I…?

- Login
- Reset My Password
- Search for Information
- Refine my results
- Filter my search results
- View Meter History
- View restricted Meter data
- Set my user specific display settings
- Manage my user account details
- Crossed Meters
    a. View Crossed Meters Cases
    b. Filters
    c. View Crossed Meters Case Details
    d. Add a Note
    e. Obligations
    f. Linked Cases/Edited MSN
    g. Closed Cross Meters Cases
    h. Re-Opened Cases
    i. Archived Cases
    j. Icons within Crossed Meters Functionality
    k. Crossed Meters Notification emails

What is/are…?

- Those 'No Entry' Signs
- Those Icons found on the results screen
- Postcards/Postcard flipper
- This Meter History Tool
- The different Supplier and Meter History views

Master Admin User Functions

- Managing Users
- Amending User Roles
- Managing Email Domains
- MAU Transfer

Other Functions

- Granting Access to Meter History Search
- Metering Service History
- Market Sector Indicators
- RMP Status (Terminated and Operational)
- Primary and Secondary Associations (Associated MPANs)
- Report Downloads

Change History:

Version Number	Status	Date of Issue	Reason for Change
1.1	Issued	26/07/2019	Previous version finalised and issued
1.2	Issued	16/06/2020	Crossed Meters functionality. Updated document from page 22. (D.E)
1.3	Draft	26/10/2020	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)
1.3	Draft	29/10/2020	Reviewed (K.H) Passed to A.B for final review (D.E)
1.3	Issued	30/10/2020	Issued as per ECOES release 6.1. (A.B)
1.4	Draft	29.01.2021	Changes as per February 2021 release of ECOES (v6.2). Passed to K.H for initial review. (D.E)
1.4	Draft	02/02/2021	Reviewed (K.H) Passed to A.B for final review (D.E)
1.4	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	15/03/2022	Added Industry Role Terminology
3.0	Issued	13/05/2022	Minor changes following QA review for RECv3
3.1	Draft	02/03/2023	Updated to include R22 (DAM) impacts
4.0	Issued	22/09/2025	Updated for MHHS Implementation

Document Controls:

Name	Responsibility	Date
Authorisation:		

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.
4.0	Updated for MHHS Implementation

Industry Role Terminology:

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

EES Role	REC Equivalent (where different)
Distributor	Distribution Network Operator (DNO)
Metering Service (previously 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, Data Service (Smart/Advanced/Traditional)

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.

MHHS Impacts

In 2025 the electricity industry has gone through a fundamental change in how events are fed throughout the market participants, in support of Half-Hourly processing. From an EES perspective this has involved a change in how updates are received into the system and – more relevant to users – data items available to those accessing the system.

The following is a list of NEW data items that have become available as a result of MHHS:

Data Item	Source
ESME ID	MHHS Stage-0
Meter Location	MHHS Stage-0
Number of Display Register Digits	MHHS Stage-0
Connection Type	MHHS Stage-0
Connection Type EFD	MHHS Stage-0
Connection Type ETD	MHHS Stage-0
Associated Import / Export MSID	MHHS Stage-0
Associated Import / Export MSID EFD	MHHS Stage-0
Associated Import / Export MSID ETD	MHHS Stage-0
Direction of Energy Flow	MHHS Stage-0
Manufacturers Make and Type	MHHS Stage-0
Disconnection Date	MHHS Go-Live
Import/Export MPAN Supplier ID	MHHS Go-Live
DUoS Tariff ID	MHHS Go-Live
DUoS Tariff ID Effective From Date	MHHS Go-Live
Data Service Effective From Date	MHHS Go-Live
Data Service Effective to Date	MHHS Go-Live
Data Service Name	MHHS Go-Live
Data Service MPID	MHHS Go-Live
Data Service DIP ID	MHHS Go-Live
Metering Service DIP ID	MHHS Go-Live
Assigned MDR Effective From Date	MHHS Go-Live
Assigned MDR MPID	MHHS Go-Live
Assigned MDR DIP ID	MHHS Go-Live
Customer Direct Contract Data Service Flag	MHHS Go-Live
Customer Direct Contract Data Service DIP ID	MHHS Go-Live
Customer Direct Contract Data Service MPID	MHHS Go-Live
Customer Direct Contract Metering Service Flag	MHHS Go-Live
Customer Direct Contract Metering Service DIP ID	MHHS Go-Live
Customer Direct Contract Metering Service MPID	MHHS Go-Live
Annual Consumption	MHHS Go-Live
Annual Consumption Effective From Date	MHHS Go-Live
Annual Consumption Quality Indicator	MHHS Go-Live
Market Segment Indicator	MHHS Go-Live

Market Segment Indicator Effective From Date	MHHS Go-Live
MHHS Indicator	MHHS Go-Live
Distributor DIP ID	MHHS Go-Live
Supplier DIP ID	MHHS Go-Live

And these are general changes:

- Meter Operator becomes Metering Service

While these data items will no longer be available after MPANS are migrated to be under MHHS processes.

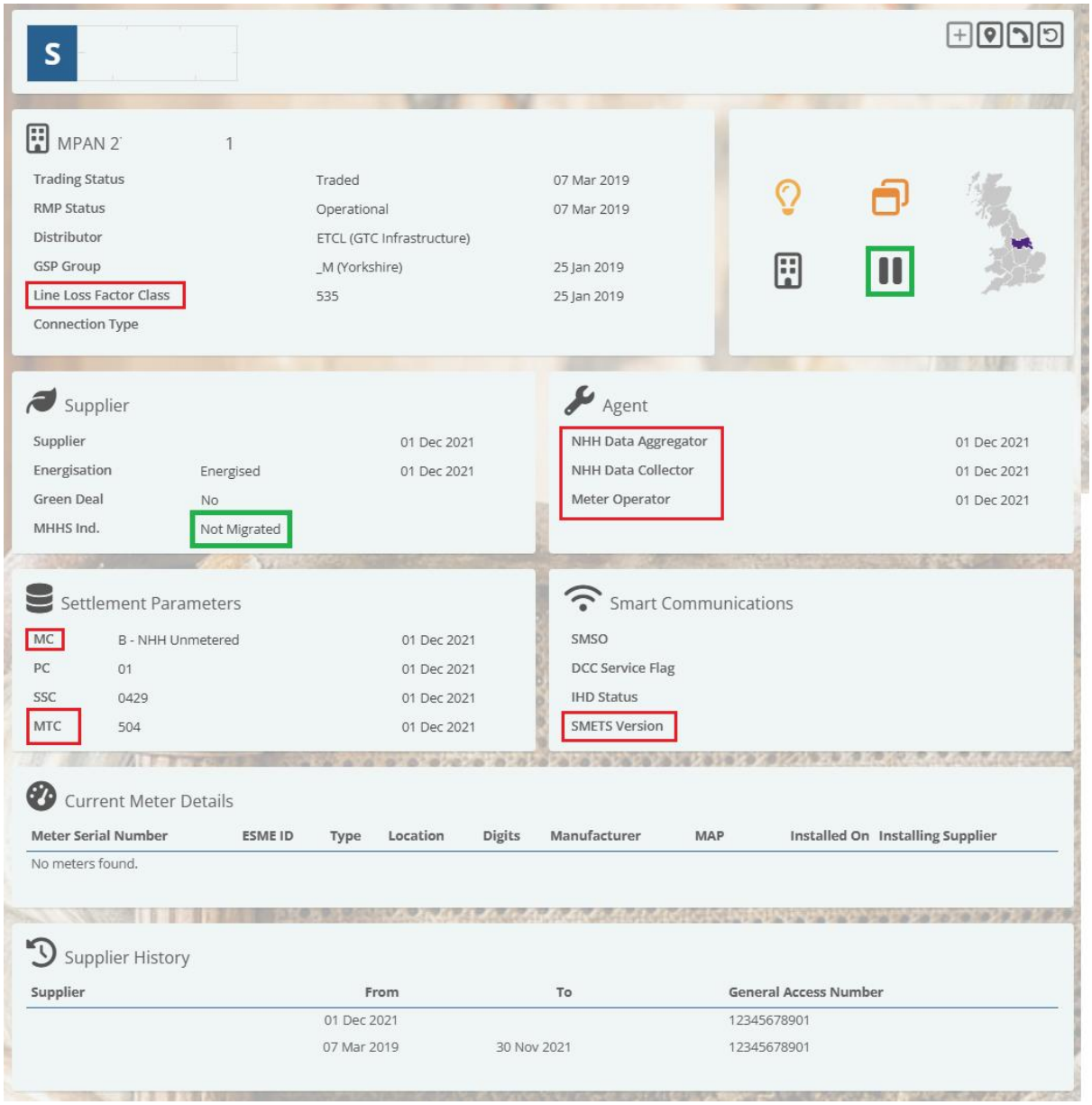
Data Item
Connection Type ETD
Meter Operator
Data Collector
Data Collector Appointment Date
Data Aggregator
Data Aggregator Appointment Date
Measurement Class
Line Loss Factor
Line Loss Factor EFD
MPAN Designation
Meter Timeswitch Class
Meter Timeswitch Class Date

It is important to note that there will be a period of transition, when participants, their systems and ultimately the MPANs under their responsibility, are migrated to be MHHS qualified and compliant. As a result during migration there will be period when old/deprecating and new data items will be available and MPANs in EES will have a marker to signify whether it is legacy, under MHHS arrangements or reverse migrated.

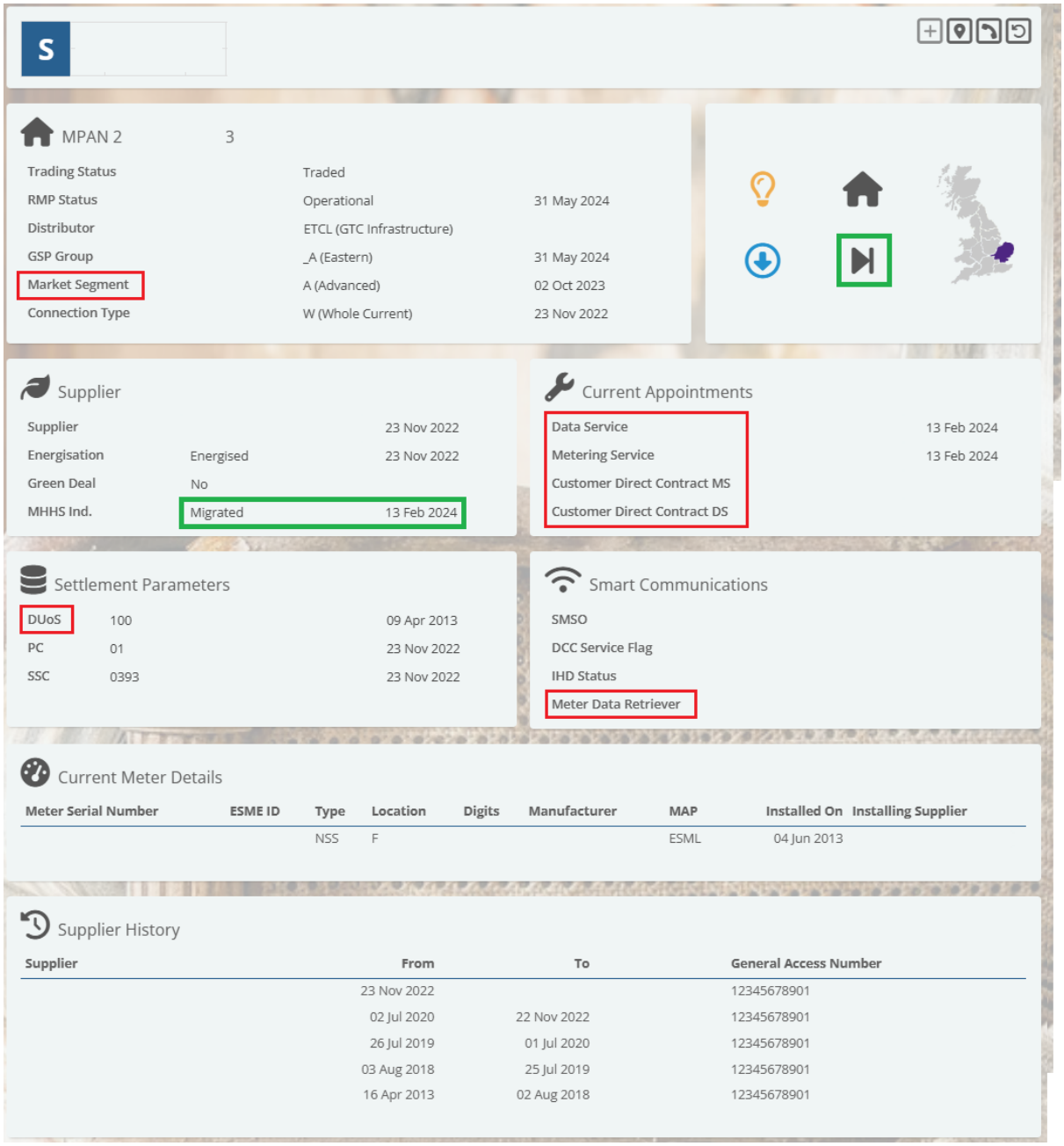
MPAN Details Screen Layout

During the migration period – during which Market Participants are readying themselves and updating their systems to be fully MHHS ready – EES will need to accommodate MPANs that are both under legacy (unmigrated) and migrated arrangements.

The screenshot below provides an example of an unmigrated MPAN which largely aligns to the pre-MHHS view, other than the addition of the MHHS_Indicator (icon and status in the 'Supplier' panel) which is boxed in green.



The screenshot below is the equivalent for a migrated MPAN – note the MHHS Indicator icon is different and the Migration status now includes a date.



Red boxes on both screenshots reflect data components that are changing as a result of migration.

Annual Consumption

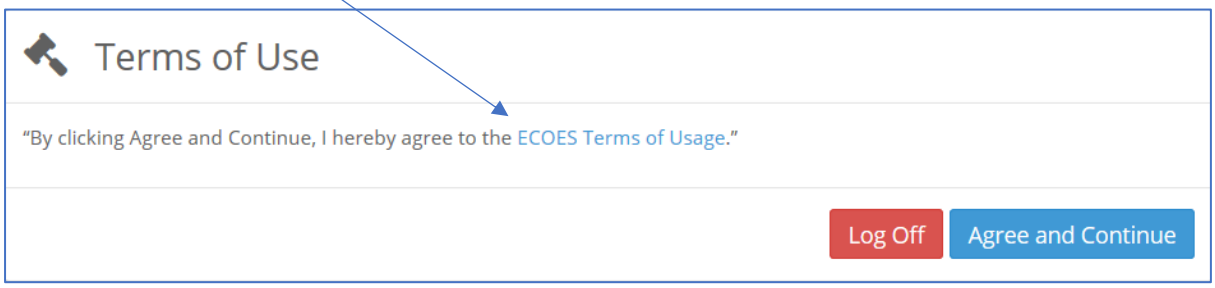
This information will be received into EES once a month for every MPAN under MHHS arrangements. The messages that provide the Annual Consumption updates will be staggered throughout the month, so different MPANs will be updated on different days of the month.

Where an MPAN has been reverse migrated – that is that it has returned to be managed under legacy arrangements – Annual Consumption data will continue to be displayed in the MPAN details screen. However, it will not be updated until it returns to MHHS arrangements, meaning that the Consumption data displayed will become stale.

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).

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

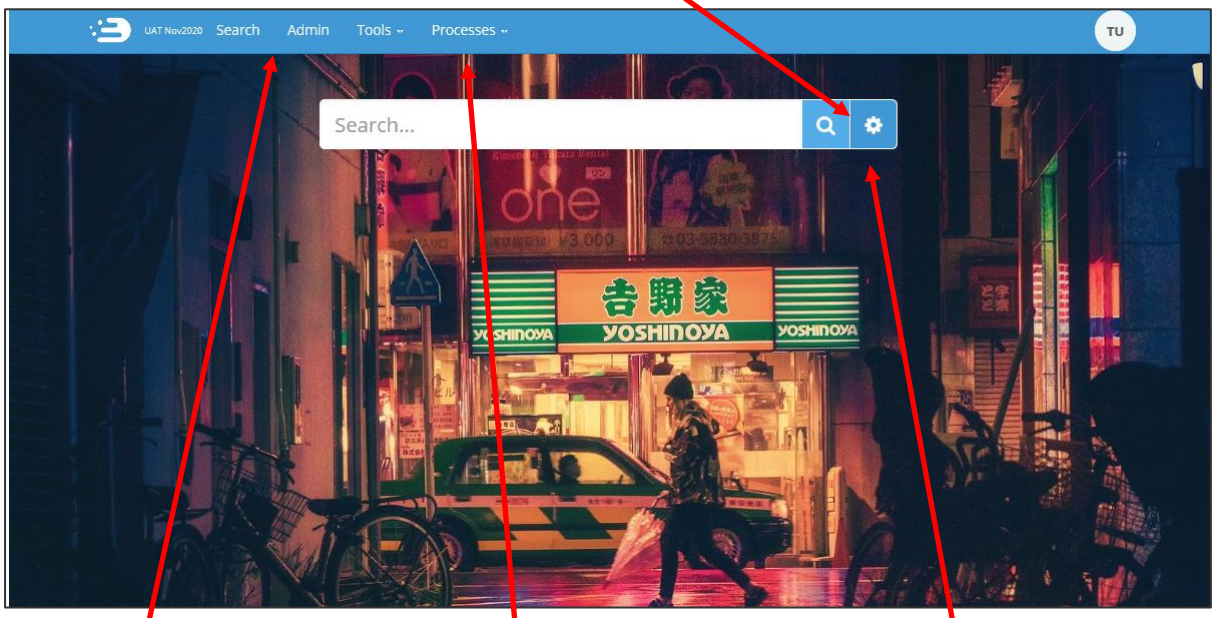
  On logging in the user will be informed of the password expiry and prompted to enter a new password.

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.

Processes – Allows Users with relevant permissions to access certain process within ECOES (e.g. Crossed Meters).

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. ECOES users are limited to 600 MPAN views per day once this limit is reached further searches are prohibited.

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.

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:

General

 Energised

 New

 Registered

 No DPI Defined

 Domestic

 Non-Domestic

 Related MTC

 De-Energised

 Geographical Representation of GSP Group

 GSP Group

 Metered Indicator

 Unmetered Supply

 Smart Communications

 Disconnected

 Green Deal

 Energy Direction (Export)

 Energy Direction (Import)

 Pending Registration Currently Under Objection

 Export LLFC

MHHS Only

 Unmigrated (Legacy)

 Customer Direct Contract – Data Service

 Reverse Migrated

 Customer Direct Contract – Metering Service

 Migrated (MHHS)

Screens/Functions

 MPAN History

 MPAN Relationships

 Contact Details

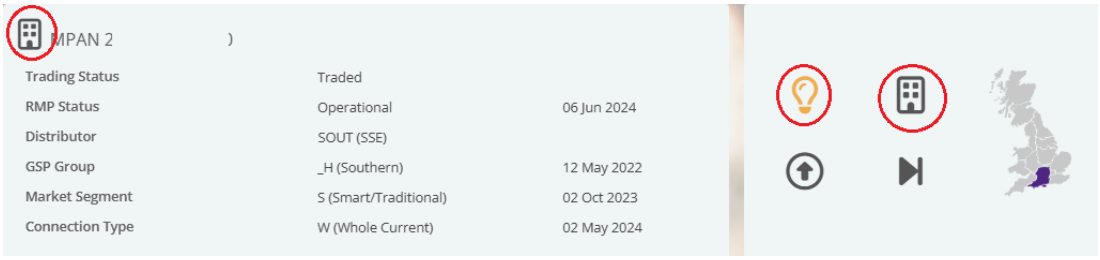
 Back to Results

 Export/Download

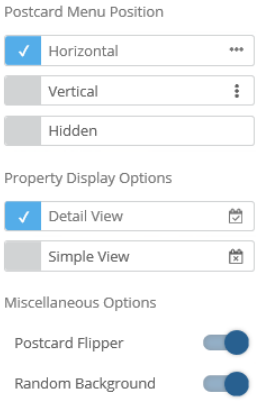
 Add a User (Admin/MAU option only)

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.



Display Settings



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.

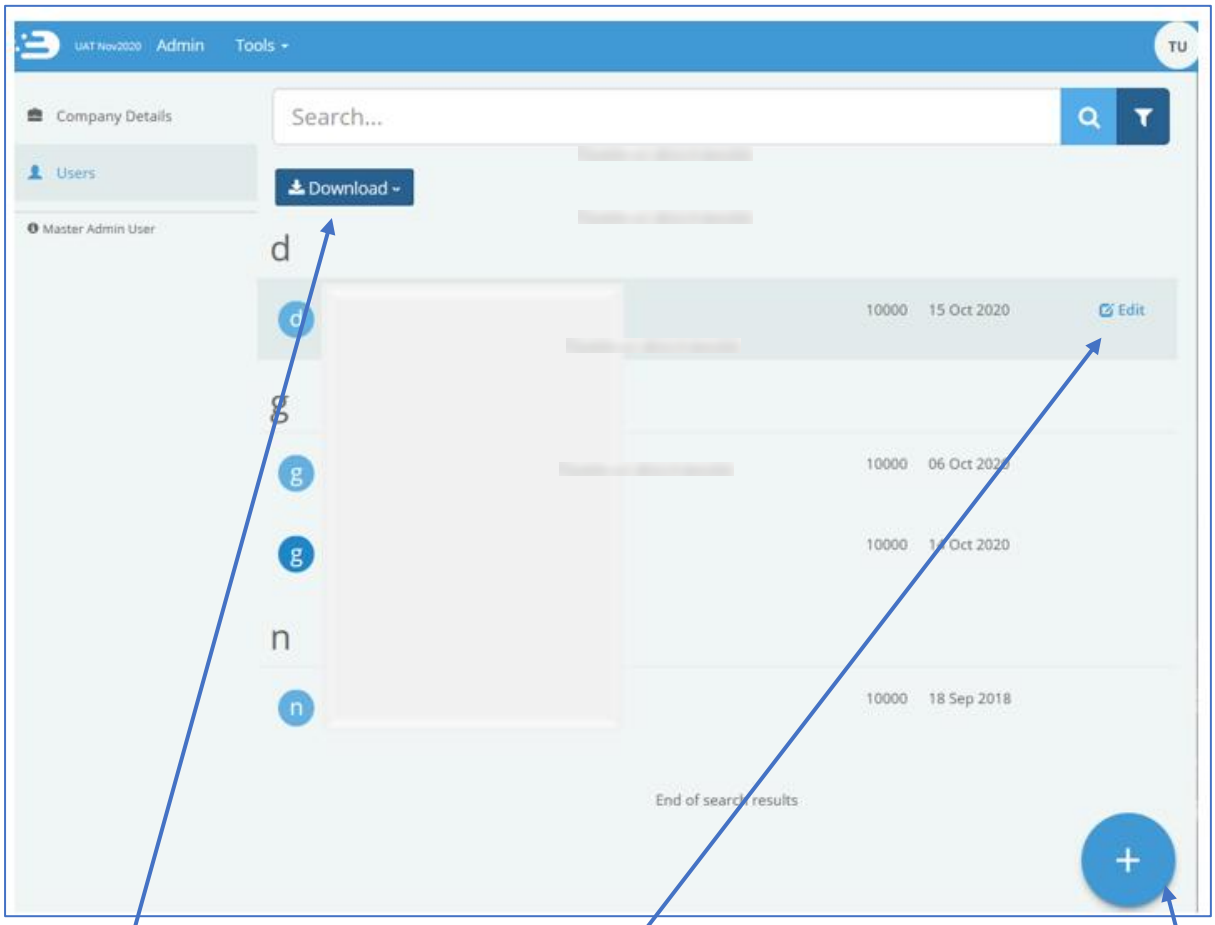
A user can also decide whether to see a 'Detailed' or 'Simple' view - the simple view will remove the dates related to some data items allowing more information to be shown on one screen without having to scroll.

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.



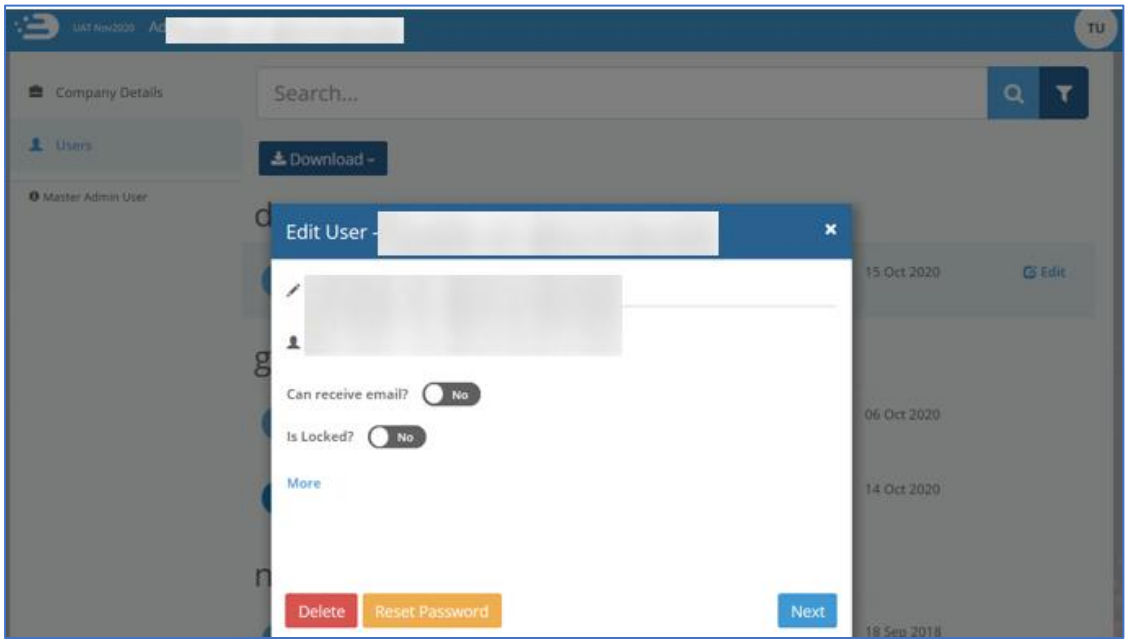
Clicking 'Download' will allow MAU and Admin users to download all the users of a company group into a report containing user details e.g. last login date.

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 which will open a blank user profile, identical to the way an edit user is displayed.

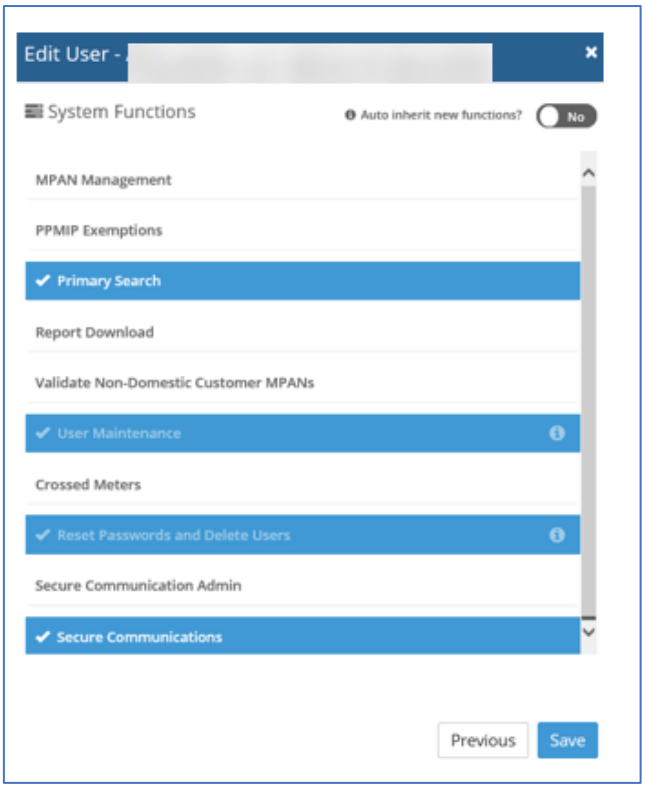
Amending User Roles

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.

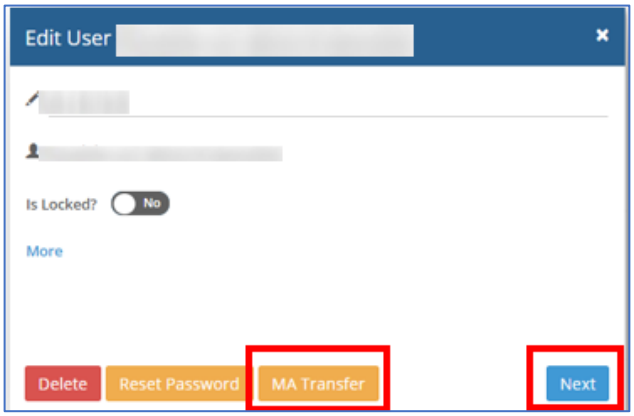


Once you click 'save', you will return to the main 'Users' page and a pop up on the bottom right of the page will confirm that this user's system functions have been saved.



Transferring MAU to another user

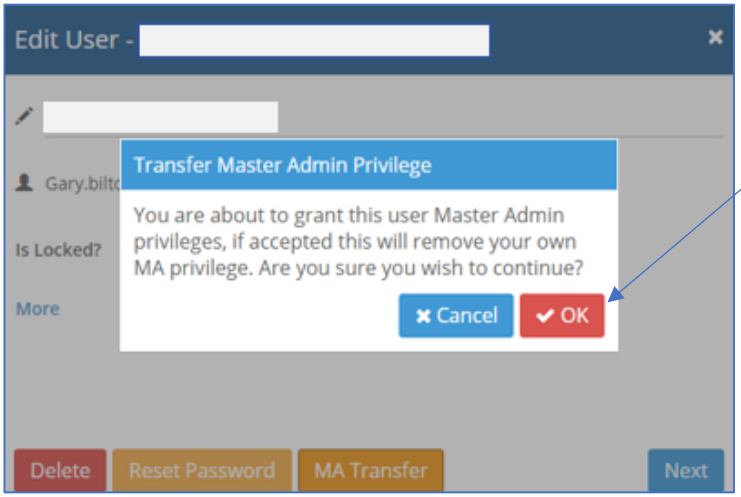
1. The user you are wishing to transfer the MAU privilege to must already have a user account and:
   - have a valid email address as their username.
   - must have a phone number populated (found in the 'more' section).



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.



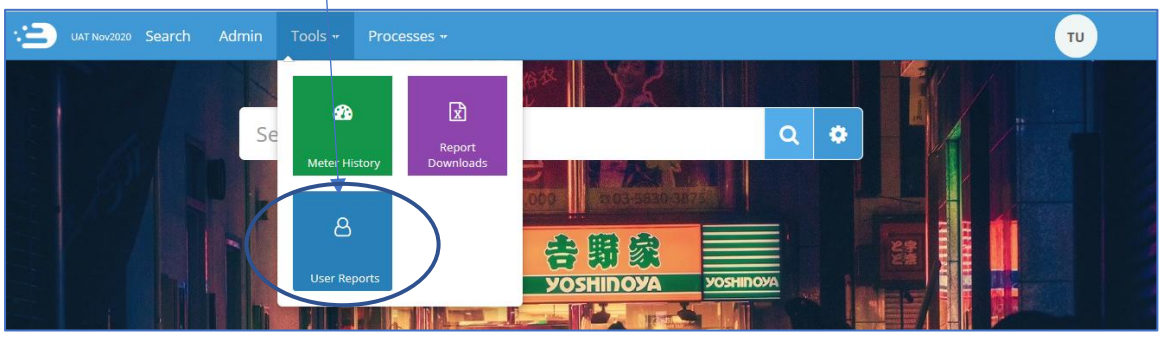
Clicking OK will generate an email to the prospective MAU.

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.

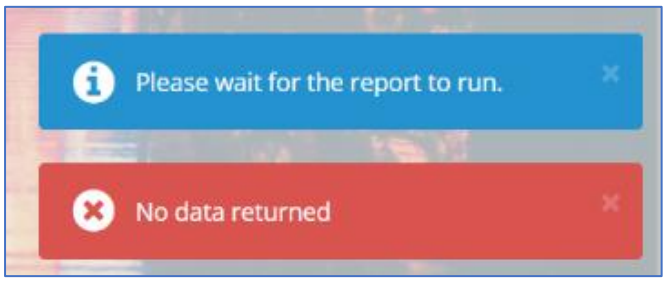
All available reports can be found within 'Tools' drop down and the 'User Reports' functionality can be accessed by clicking on 'User Reports'.



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.

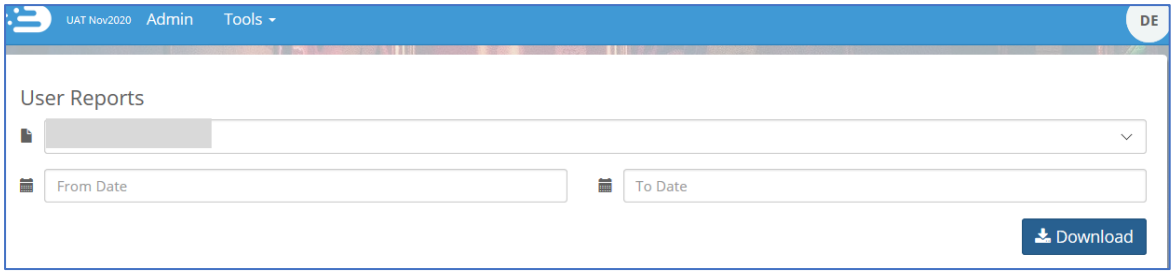
If a report is not available for your chosen timeframe, the system will notify you like so.



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.



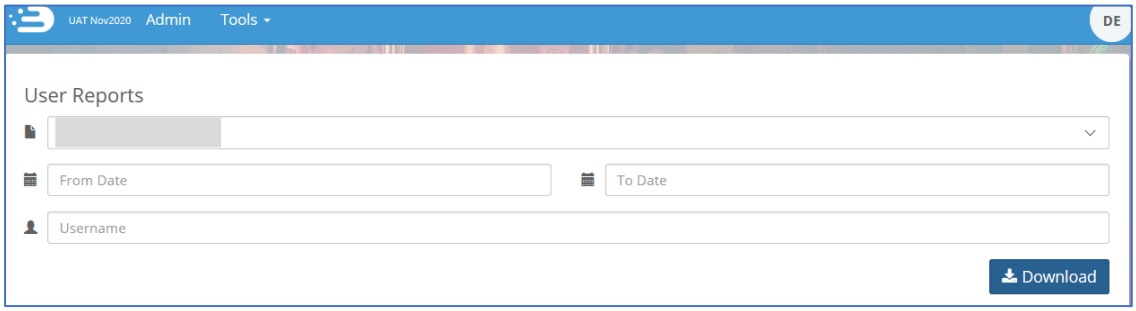
2. User details report

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.

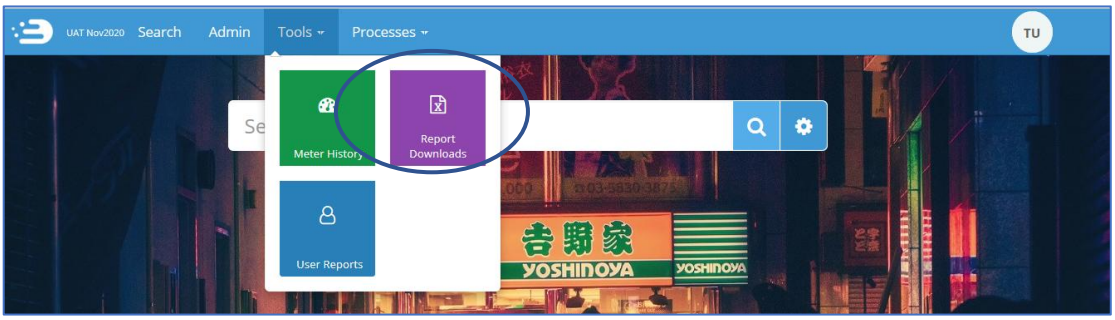
It shall provide the following information:

- 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).



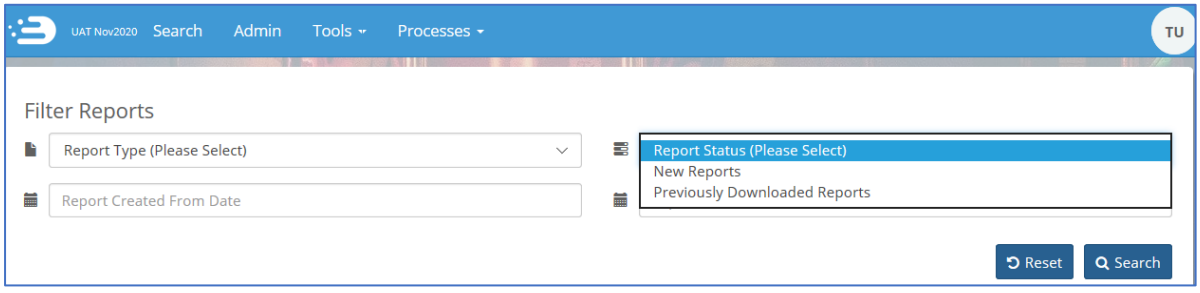
Report Downloads

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



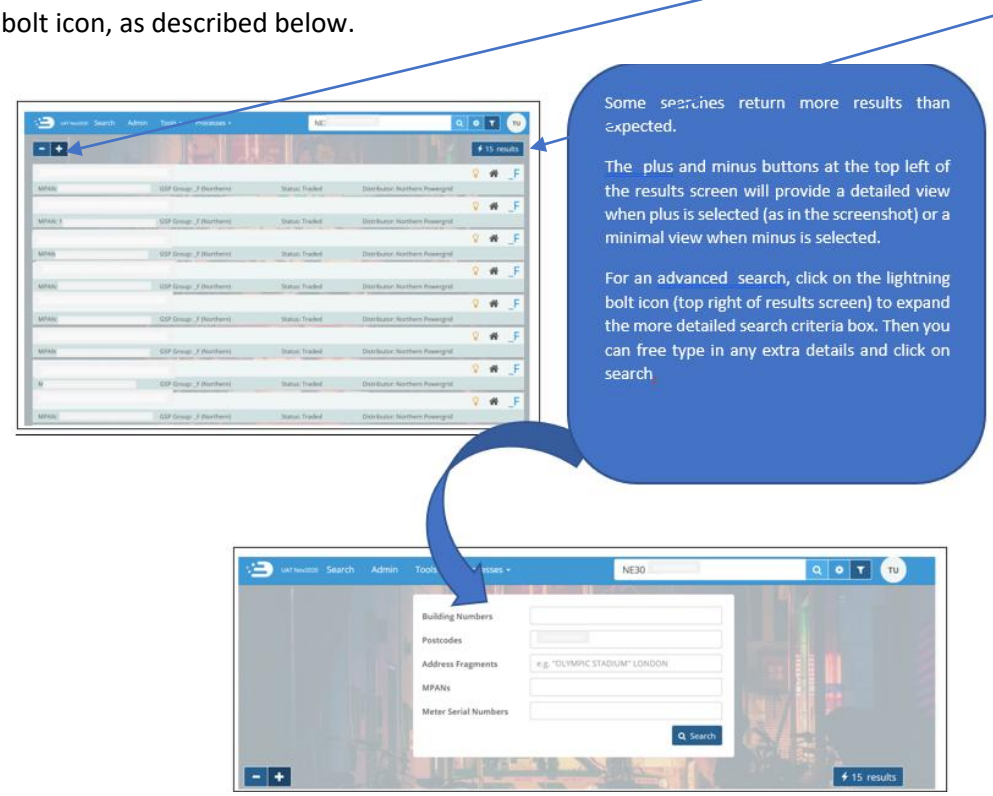
Please note that historically, a D0312 report was available within 'report downloads', however this was removed during the June 2019 release of ECOES and is no longer available in any reporting.

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

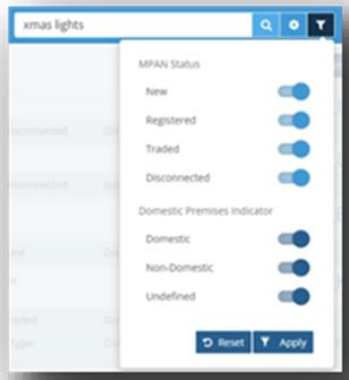


Refining Results

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



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.

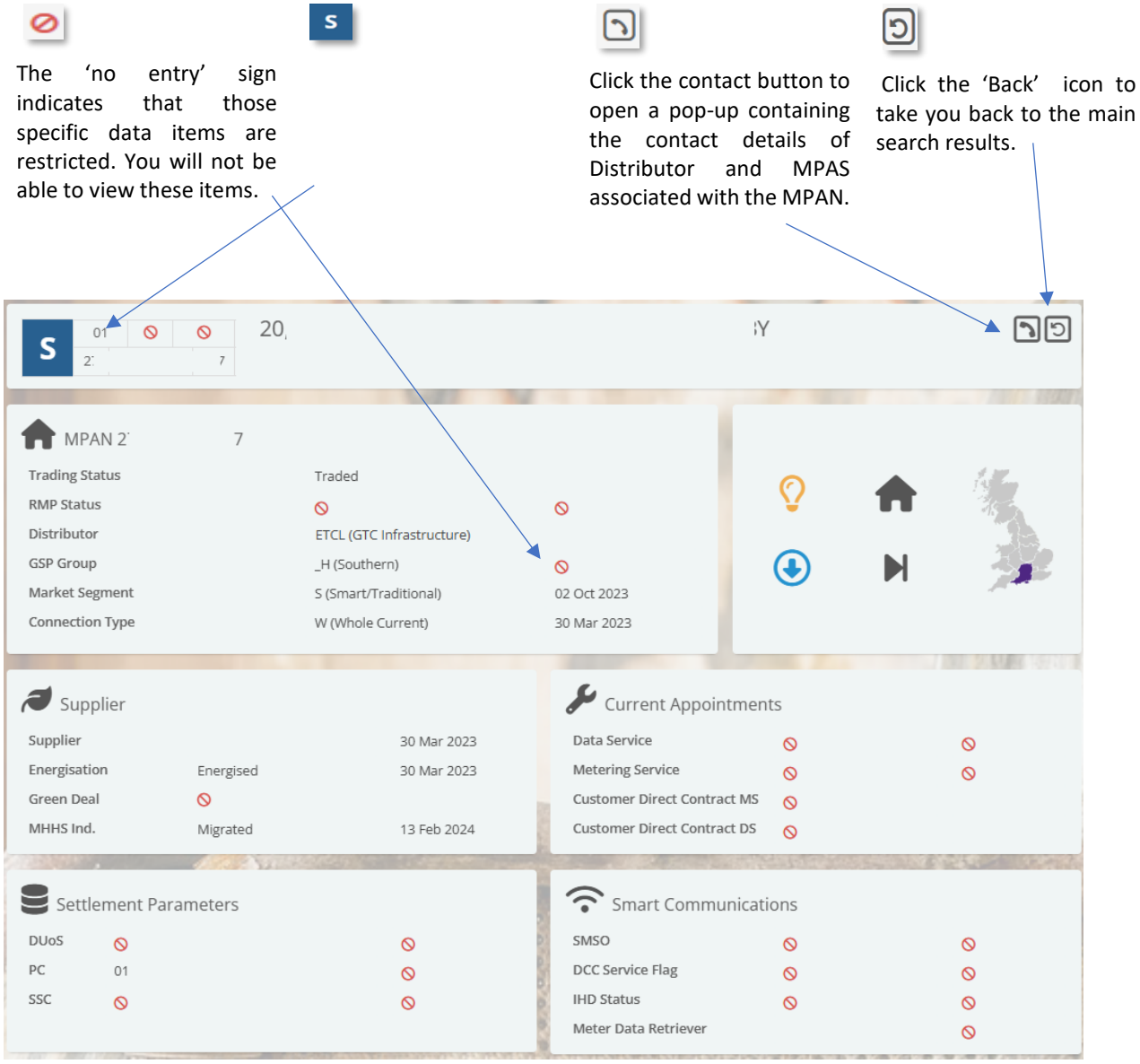


MPAN page and Restricted Data

Restricted Access

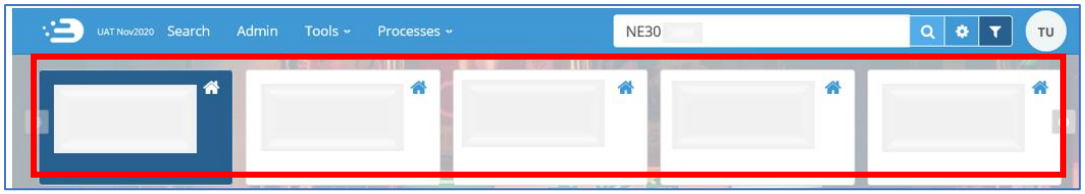
Users with restricted access, will be unable to view all details associated within everyMPAN record. Whether a Data Item restriction applies will depend on your Organisation's Industry Role and/or how they and other ECOES organisations have setup their access rules. A summary of what Data Items are returned and what Data Item restrictions may be in place can be found in the Data Access Matrix, available via the REC Portal.

An example of a restricted access view can be seen below.



Postcards/Postcard flipper

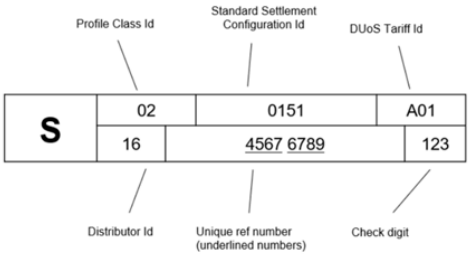
Searching by postcode will usually result in 'Postcards' being visible within the MPAN record. Postcards (highlighted in the red box below) are designed to allow users to quickly view another search result without needing to navigate back to the results page.



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 pesent.

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

The S-Number at the top of the MPAN display (marked by the S icon) is an industry recognised set of MPAN attributes – some of which when put together form the 13-digit MPAN core (number). The make up of the S-Number disaply consists of the below:



Where there is no Profile Class or SSC for a given MPAN, the values displayed in the S-Number will be zeroes (00 and 0000).

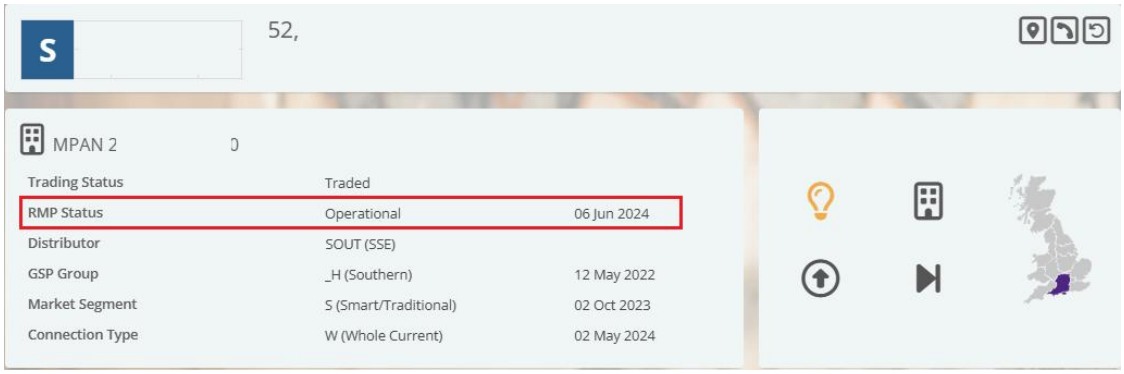
Registrable Measurement Point (RMP)

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 visible in ECOES, under the Trading Status at the top of the 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.



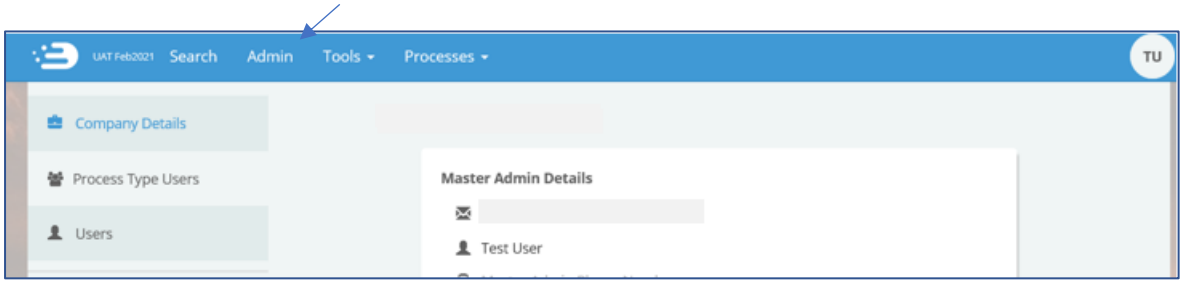
Meter History

A Meter History Module is available for Supplier and Metering Service users, which allows them to search for a meter's history by Meter Serial Number (MSN) or MPAN. Metering Service users will have a view of the MPAN Meter history that will begin on the date of the first installed Meter through to the present day.

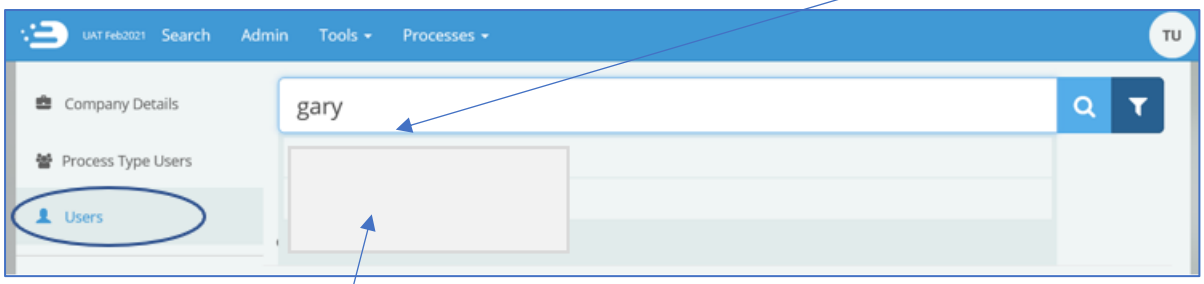
In order to have visibility of the Meter History tool, a user must be given access within the admin System Functions tool.

Granting Access to Meter History Search

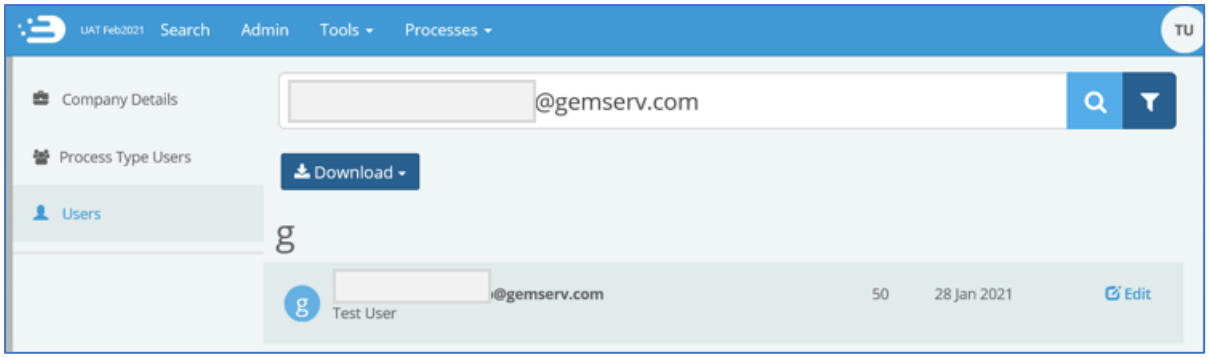
Supplier and Metering Service MAU's and admin users with User Maintenance privileges can grant access to other users within their own Company Group. To do so, follow the steps to log in to your ECOES account and click on 'Admin'.



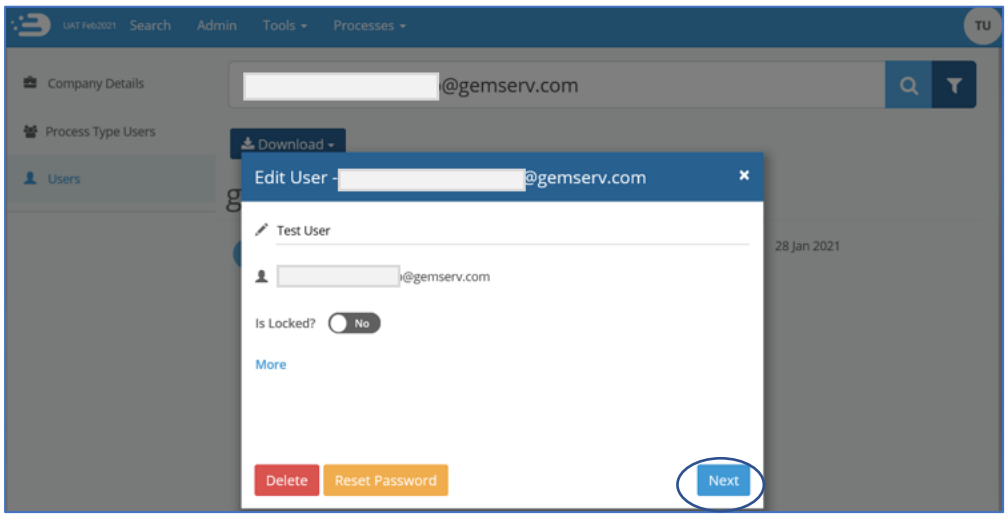
Next, select 'Users' and in the search tab begin typing the name of the user who you wish to grant Meter History privileges to, user accounts with that name will become visible below the search bar.



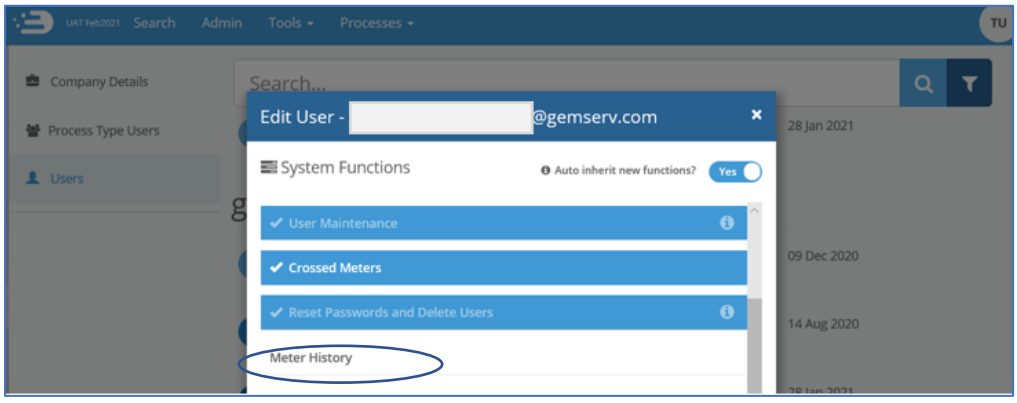
Select their name from the dropdown and the select their record to 'edit' it.



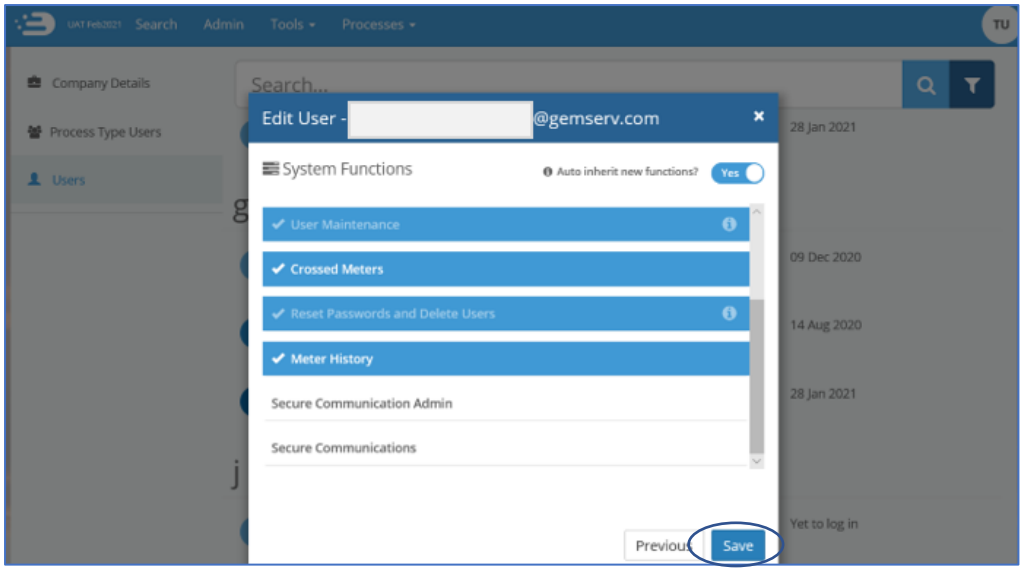
Once you have clicked on their record, you will see a pop up giving you an option to edit their name, lock the account, or add further information by clicking ‘More’. At the bottom part of this edit user box, you have the options to delete the user, reset their password or to select ‘next’, click on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

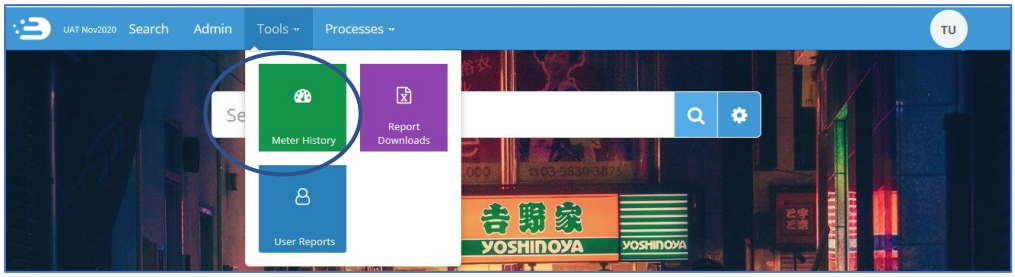


A pop up will confirm 

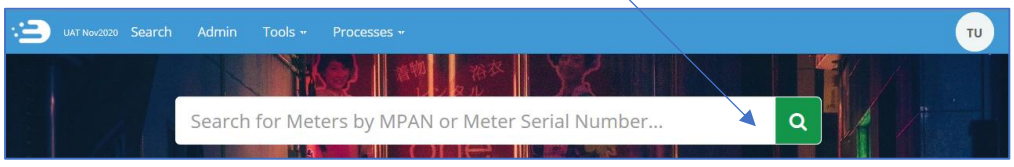
The user will now have access to the Meter History functionality, within Tools.

Meter History Tool

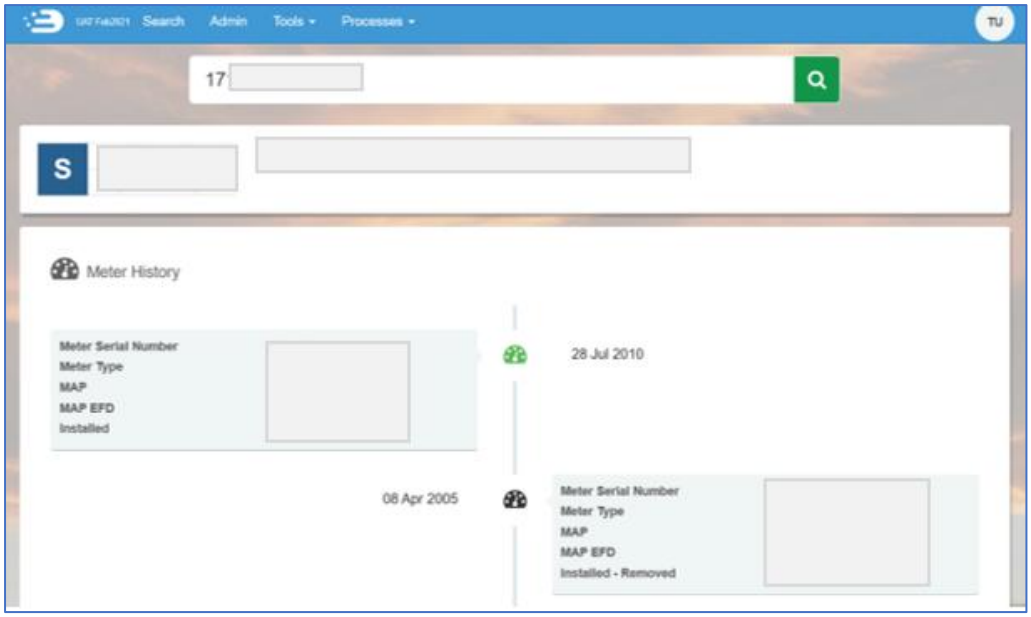
The 'Meter History' functionality within the 'Tools' drop down allows the Metering Service user to search and view meter history for a particular Meter.



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



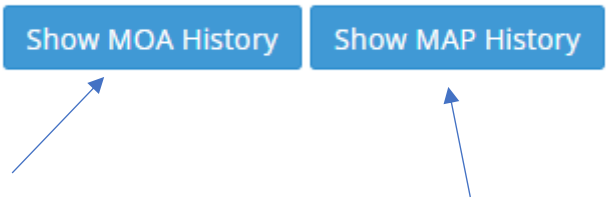
When the user enters the MPAN or MSN and clicks search on the search icon, they will be presented with the view shown below.



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 & EFD
- Installation Date

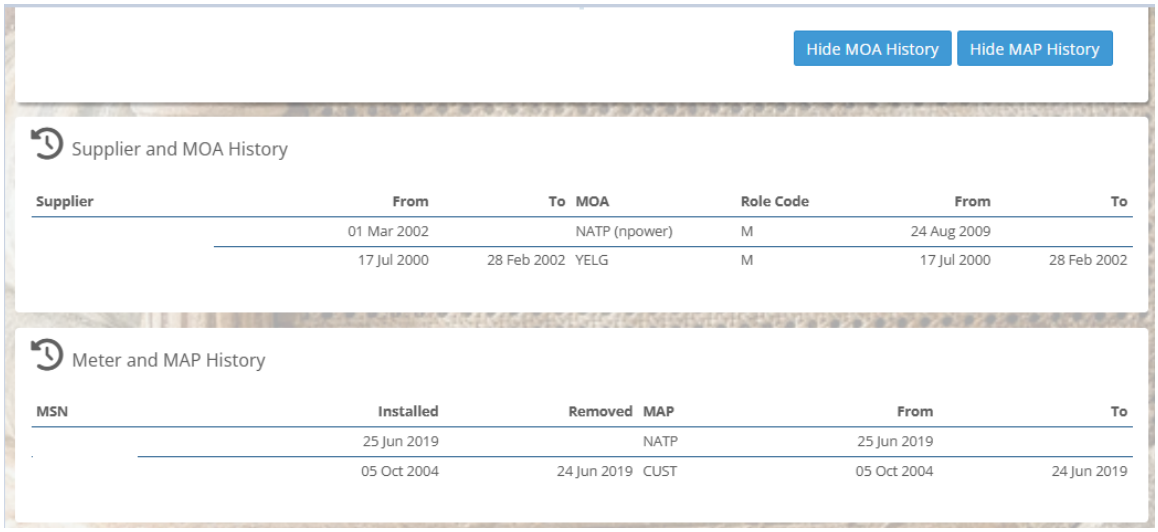
Towards the lower half of the page, the user is given the option to view more details by selecting 'Show MAP History' and/or 'Show MOA History'.



Clicking 'Show MOA History' will open the MOA History, including Supplier MPID and associated dates, as well as MOA MPID and associated to and from dates. Also displayed is the Metering Service role code to differentiate where a Traditional, Smart and Advanced agent has been assigned.

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

Each can be opened separately – below shows both being opened at the same time. Note the blue button provides the option to re-close the specific panels.

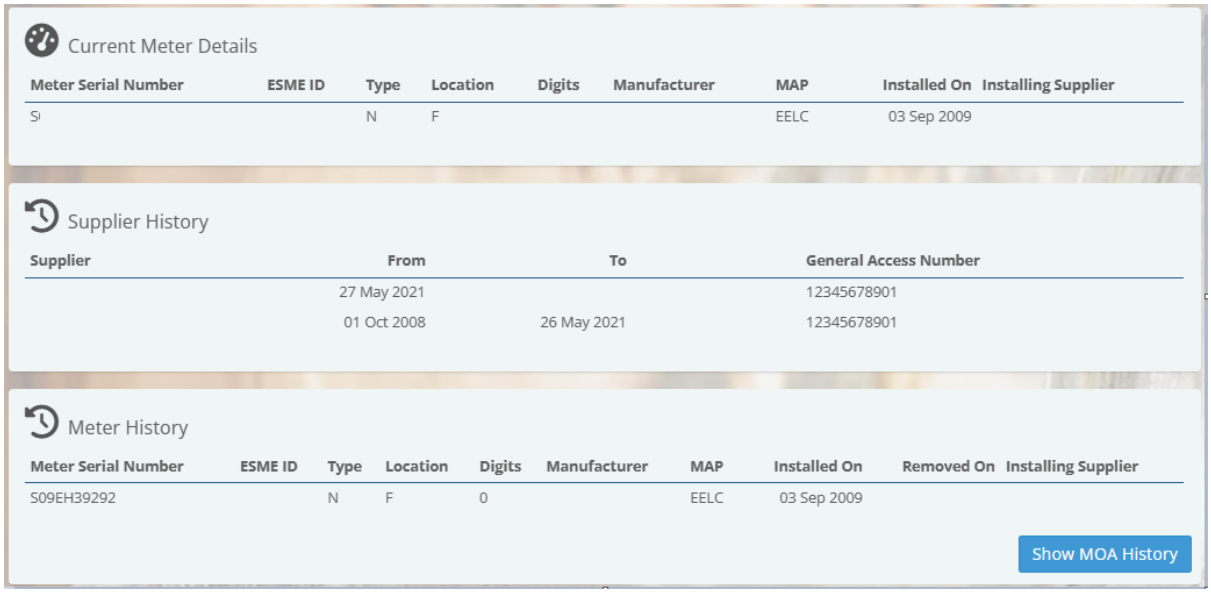


Supplier, Agent and Meter History and Meter Maintenance

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.
- Metering Service, Data Service 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.

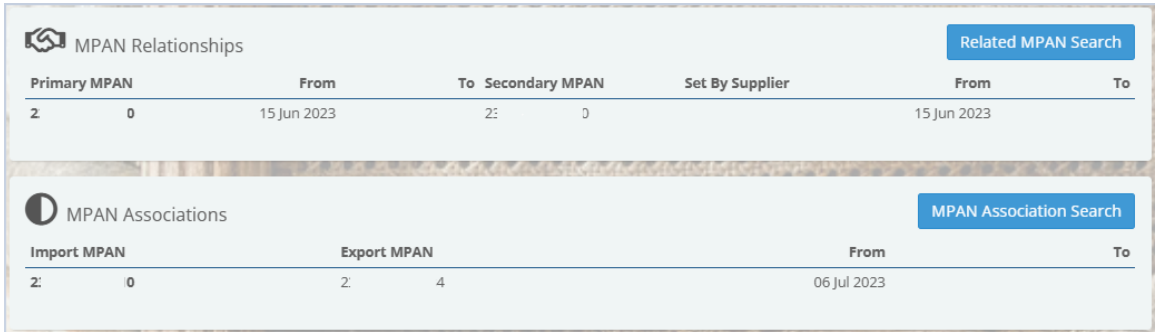


Clicking on 'Show MOA History' will open up the view on the right. This can be closed by again clicking the blue button.,

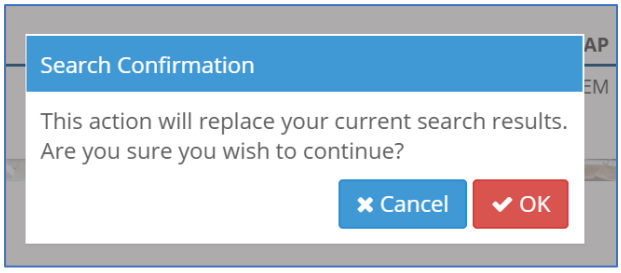


Related and Associated MPANs

The MPAN Details screen provides details for related and linked MPANs to the one currently being viewed. Note that the current MPAN will appear in bold as the Primary/Secondary or Import/Export. For Associated (linked) MPANs, the energy direction of each is represented by an icon that signifies it as either an Import ( ) or Export ( ) MPAN in the Search results or summary view.



Multiple relationships or associations can appear including those no longer in effect (with a 'To' date set). Where active relationships and associations exist, clicking on the blue button will allow access to the other MPANs details page.



If you click Ok, you will be taken back to the MPAN search screen, where all Related or Associated 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 pesent.

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



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 21: MRA Transition sets out the requirements and processes for investigating and resolving Crossed Meters in Domestic and Non-Domestic Premises. The aim of the MAP is to provide a mechanism by which Suppliers and their Meter Operator (Metering Services) can implement a uniform approach to resolving Crossed Meters.

Additional functionality has 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 Metering Services.
- The ability to record site visit results, upload files relating to the Crossed Meter Case and exchange information with associated Suppliers and Metering Services 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.

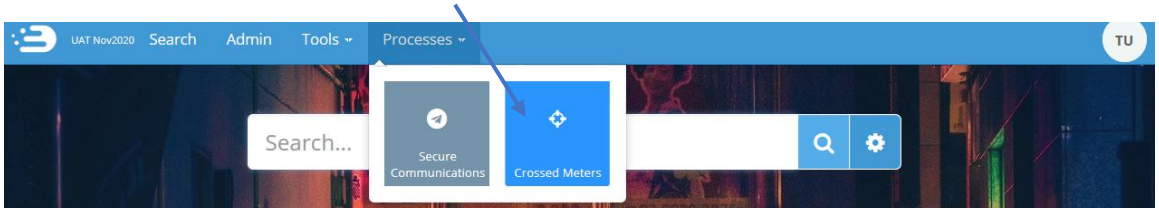
Access to Crossed Meters information

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.



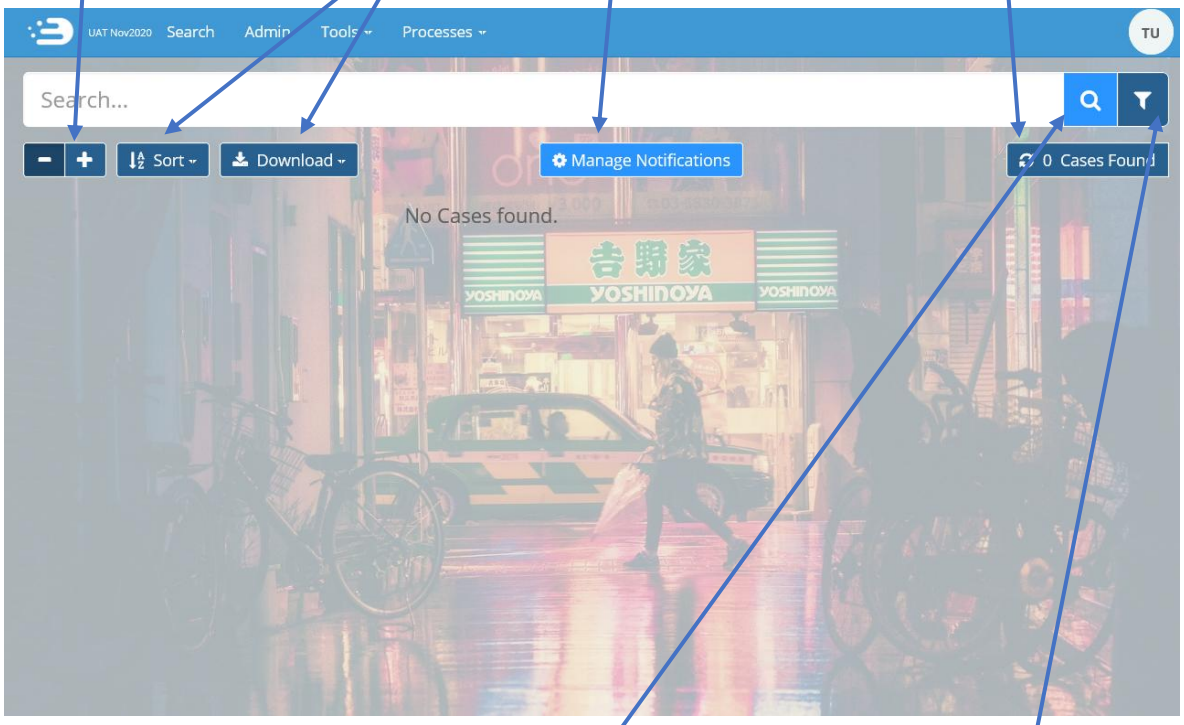
This screen lists all Cases where the current user is associated to a Case. If the user is the current Metering Service or Supplier or has been the Metering Service or Supplier since a Case was opened, then the Case will appear in this list.

Cases can be viewed in detailed view or simple view.

Sort or Download search results.

Set email notifications to daily or never.

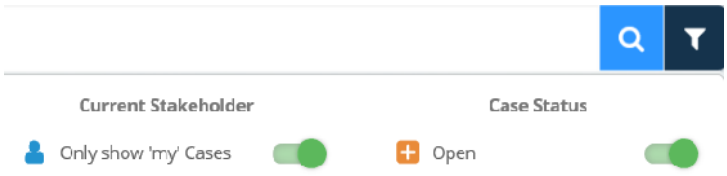
Confirms amount of live Cases.



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

Filters

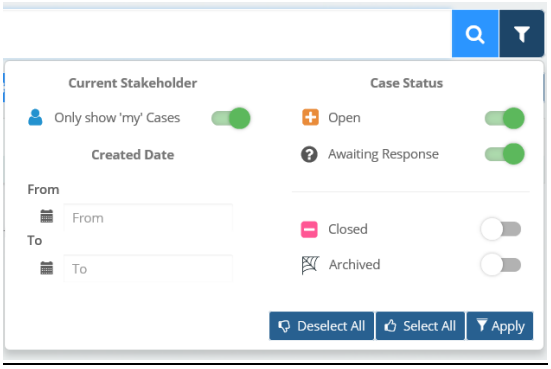
It is important for the user to use the filter as soon as they log in, as the pre-set filters might exclude pertinent information. The filter is pre-set to "Only show 'my' Cases". 'My' is in brackets due to this being a crossed meters Case and could be linked to another MPAN.



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.

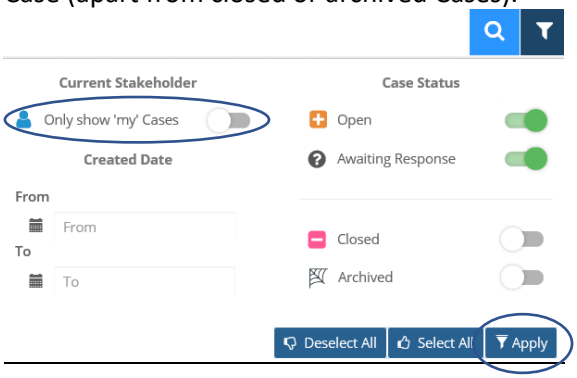
Original Filter settings

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

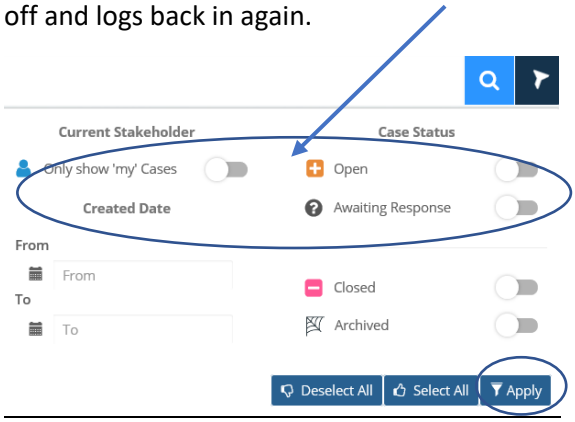


Recommended Filter settings

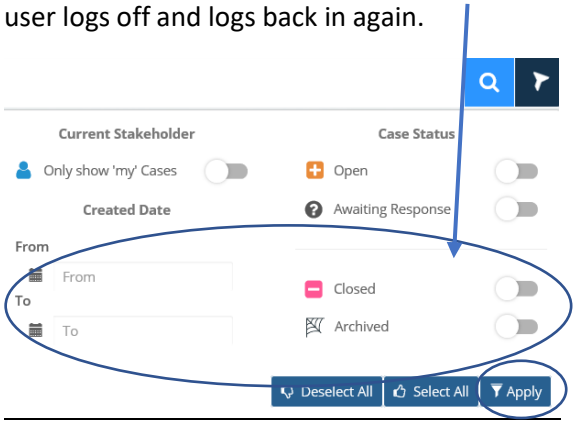
This will show all records for the users MPANs, as well as all associated records for a Crossed Meters Case (apart from closed or archived Cases).



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.



Viewing Crossed Meters Case Details

Only Supplier users can create new Cases for MPANs where they are the current Supplier. There can only be one Active Case for each MPAN.

Each Metering Service will need to agree how they manage Crossed Meters Cases bi-laterally with their Supplier (either via the ECOES Portal (as in the example below) or any other method as agreed bi-laterally with their Metering Service (e.g. D0001/D0005, email…etc).

Once a Supplier User creates a new Case, 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, Metering Service, and Distributor) will be linked to this open Case.

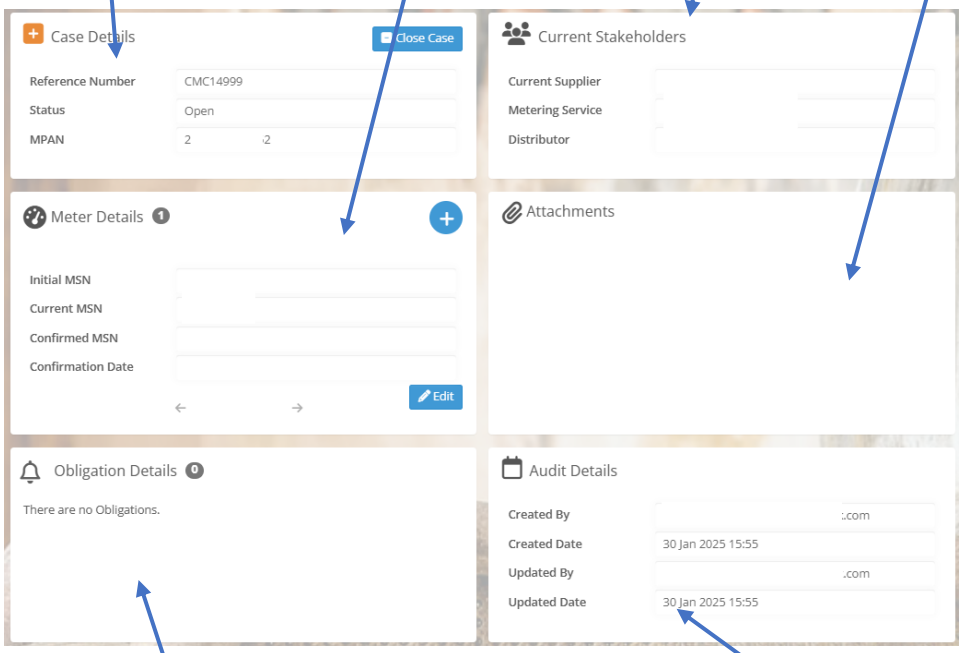
Metering Service users will be able to view the full information within the Crossed Meters Case Details screen. The Crossed Meter Case Detail screen provides the user with all details of the Case, including providing access to all linked Cases.

Case Details
Including Unique Case Reference Number, status and MPAN.

Meter Details. Only 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).

Further details regarding obligations can be found here.

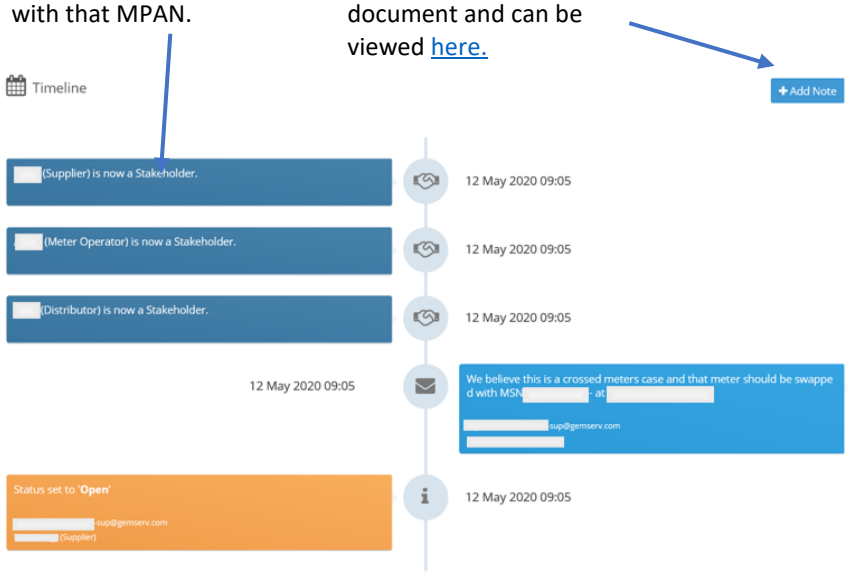
Audit Details – This information is updated when a user or scheduled job changes the status, enters contact details, or adds a note. User details as

This will remain until a response has been sent.

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 that Stakeholders associated with that MPAN.

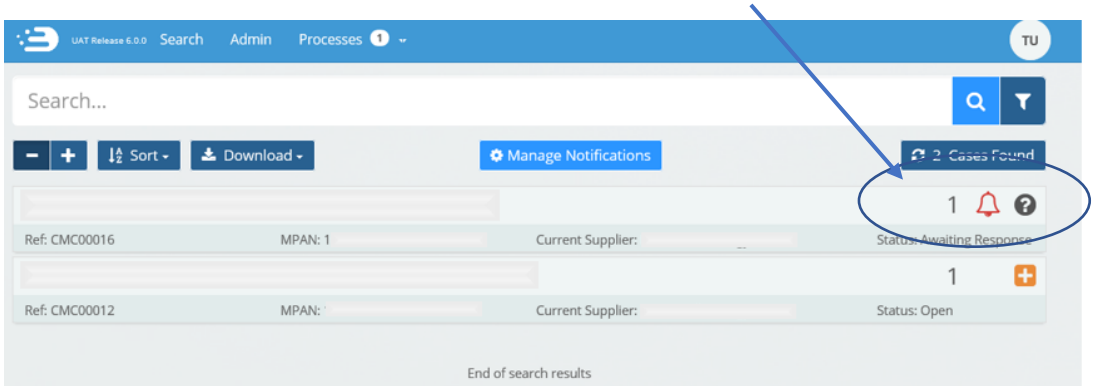
A user can use the + Add Note function to add a comment. This is covered in detail in further on this document and can be viewed here.



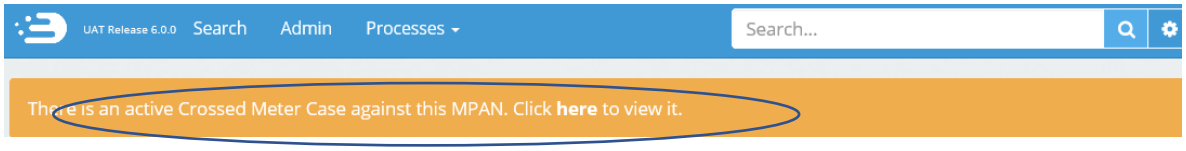
The Metering Service user will have visibility of this Case creation within the Crossed Meters dropdown under 'Processes'.



This will show only the live records for which the Metering Service is the agent, as well as any associated MPANs that are linked to that Case (providing that filters have been set accordingly).



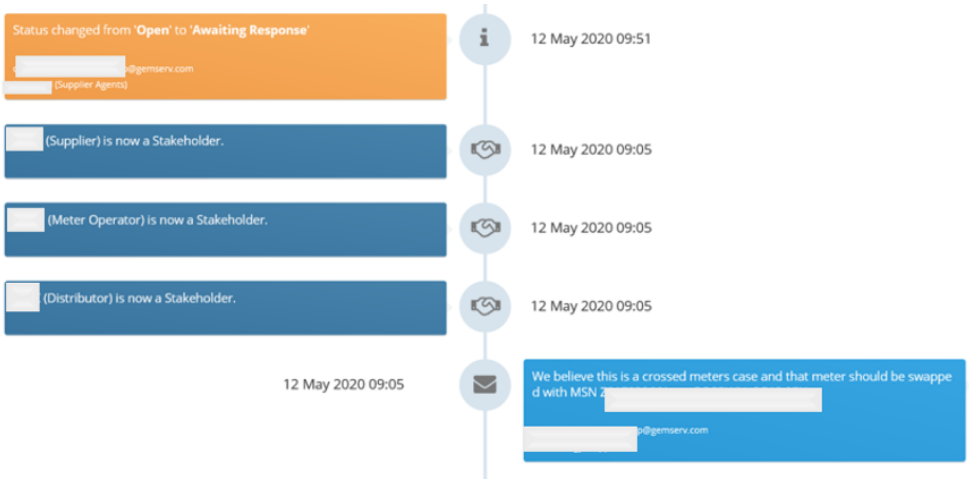
A user can now enter that MPAN record into the ECOES Search bar, and when selected they will see a note confirming that there is an active Crossed Meter Case against this MPAN. Note that only the Current Supplier and Associated Stakeholders will have visibility of this message.



The Metering Service user will have visibility of this Case creation within the Crossed Meters dropdown under 'Processes'. The Metering Service can also view all applicable Crossed Meters Cases within the Processes tab and will see a notification if the Supplier raised a note for their attention. An email will also be sent to all users within a specific Company Group whenever there is an unseen update to a Case (such as a new note added for their attention).



If the Metering Service user chooses to use the Crossed Meters function within ECOES to communicate with their Supplier, then at this stage they can scroll down to the timeline and view the details of the Crossed Meters Case, generated by the Supplier (shown below in blue).

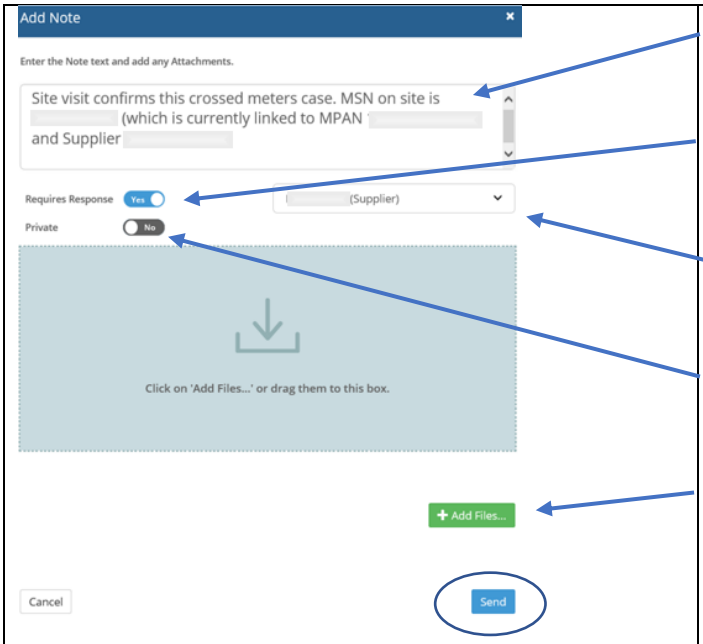


For this example, the Metering Service user has chosen to go on site to investigate and updated the Supplier with a note confirming what MSN is on site. Any notes from updated by the Metering Service user will be visible in the Case Timeline (shown below in pink).



Adding a Note

Within the Crossed Meters Case Details Screen, scroll down to the timeline and click on 'Add Note'. Clicking 'Add Note' will generate the 'Add Note' pop up, an example of this is seen below.



Content is mandatory and must be completed.

The 'Requires Response' has been moved to Yes, which asks a question of the Recipient Company and in this example will obligate the Supplier to respond.

The Recipient Company dropdown will need to be selected when asking a question.

A note can be made private by changing this to 'Yes'. If 'Private', only the recipient and note creator company will see the content of the note. The timeline will show the note is private.

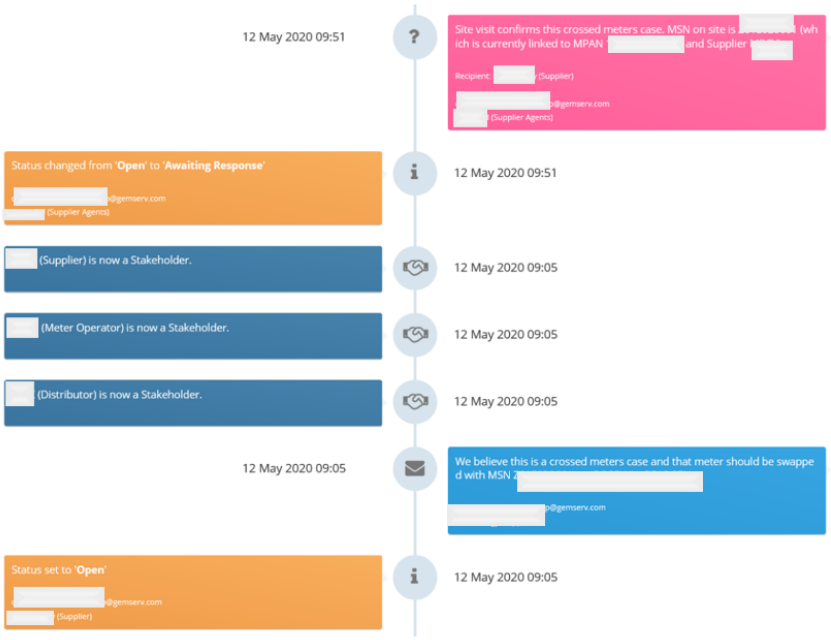
'Add Files' allows the user to add an attachment(s). For example, a picture confirming the MSN on site. A limit on the size of attachments sent in a single message is set to 10 MB.

Once complete, click 'Send' to send your note.

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 

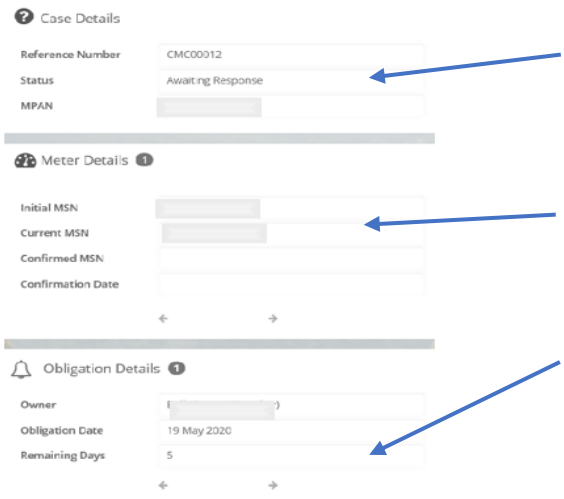
.

The note will also be visible within the Case Timeline.



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 Metering Service 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.

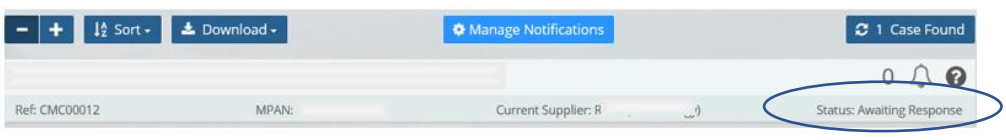


Case Status now shows as "Awaiting Response".

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

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

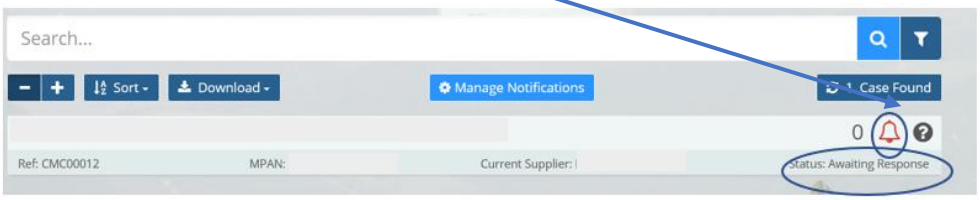
When the Metering Service user clicks return, the status on the will also show as 'Awaiting Response'.

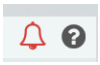


This ‘Awaiting Response’ status will be visible to the Supplier user when they log on to ECOES. They will see this notification.



And will also see the status as ‘Awaiting Response’ and a red bell will be visible to confirm that the user has an obligation to respond to. This will remain until the Supplier responds to the MOP’s note.

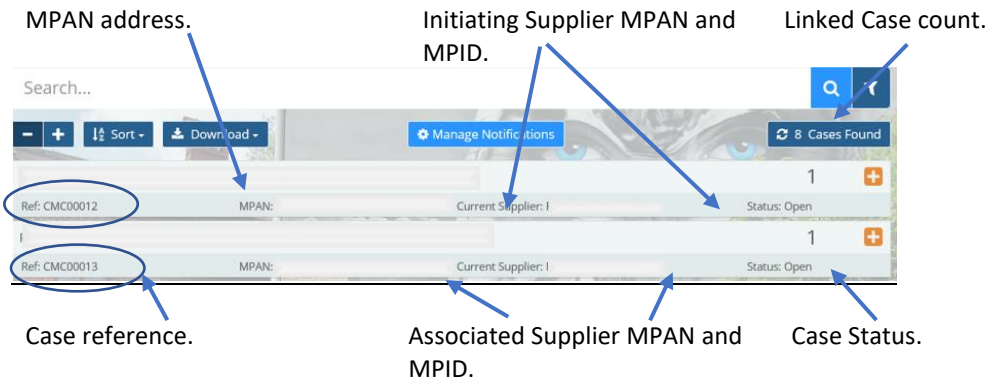


The Metering Service user can also hover over the  to view obligation details. The **bell** confirms the Obligation date deadline and the **question mark** confirms the status as ‘Awaiting Response’. This will remain until a response has been given. The Obligation and ‘Awaiting Response’ status will change once the Supplier user clicks ‘Add Note’ and sends a response.

Linked Cases/Edited MSN

The Supplier user can respond and then edit their MSN accordingly (as per notification of the correct MSN from the Metering Service). Once the MSN is edited, the Supplier user will be advised that if they accept the change, a linked Case will be created linking the MPAN relating to the updated MSN to this Case (and notifying the Associated Supplier and their Metering Services accordingly).

The Associated Supplier and their Metering Service 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.

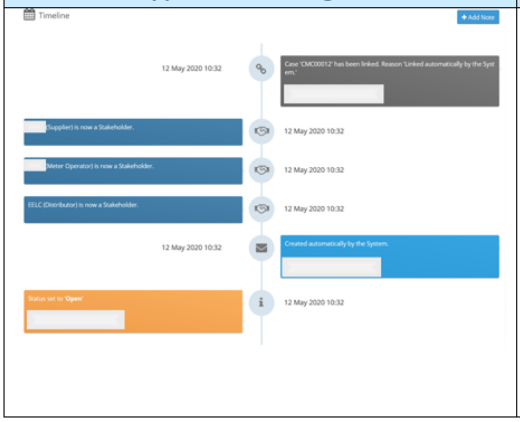
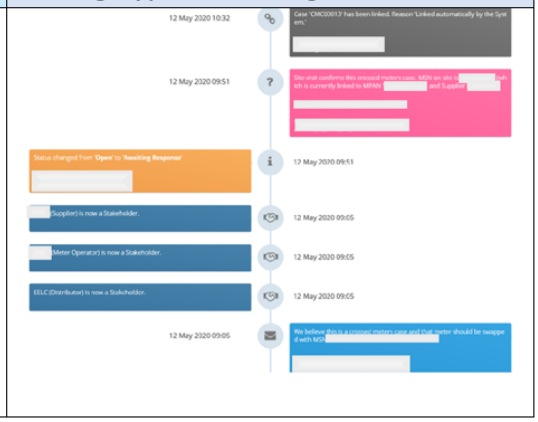


Each Metering Service and Supplier involved with the Linked Case can access the Timeline detail of all Linked cases. Any actions that the Initiating Supplier or their Metering Service take, will be visible to the Associated Supplier when they click into the address line for the MPAN belonging to the Initiating Supplier. Only Notes that have been marked ‘Private’ will not be visible to all and will only be visible to users within their intended recipient Company Group. Likewise, the

Initiating Supplier can see any action that the Associated Supplier takes. To see this, they 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 (Address 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, they 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

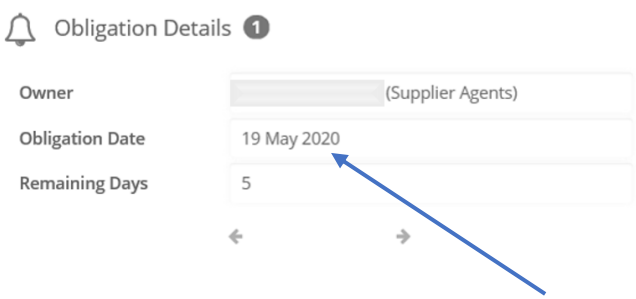
Associated Supplier and their Agents	Initiating Supplier and their Agents
	

Once the Associated Supplier has familiarised themselves with the details of the Case, they are required to investigate if this is a Crossed Meters situation. They may choose to communicate with their own Metering Service via the 'Add Note' function within the Crossed Meters Case record belonging to their MPAN, or they may choose to process any requests with a dataflow or other acceptable method of communication.

Each Supplier and Meter Operator will need to agree how they manage these communications bi-laterally.

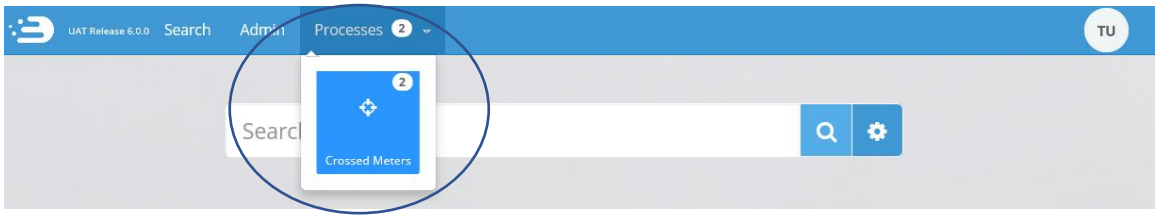
In this example, the Supplier adds a note and selects 'Requires a Response'. This will obligate the Metering Service user to respond to this note.

The Metering Service user will receive a notification and will be required to respond. Until they 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 for the Metering Services attention).

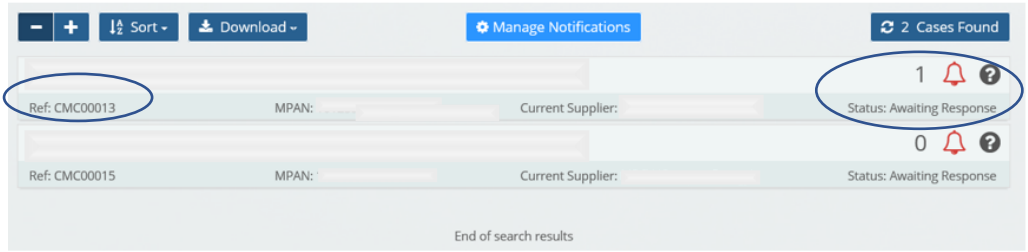


Obligation Date is the deadline for a response. If the request was for a site visit, it may not be possible to turn this around in 5 Working Days, so a response confirming a Site Visit will be booked or a note confirming a discussion with the Supplier will be enough. Further notes can be added later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

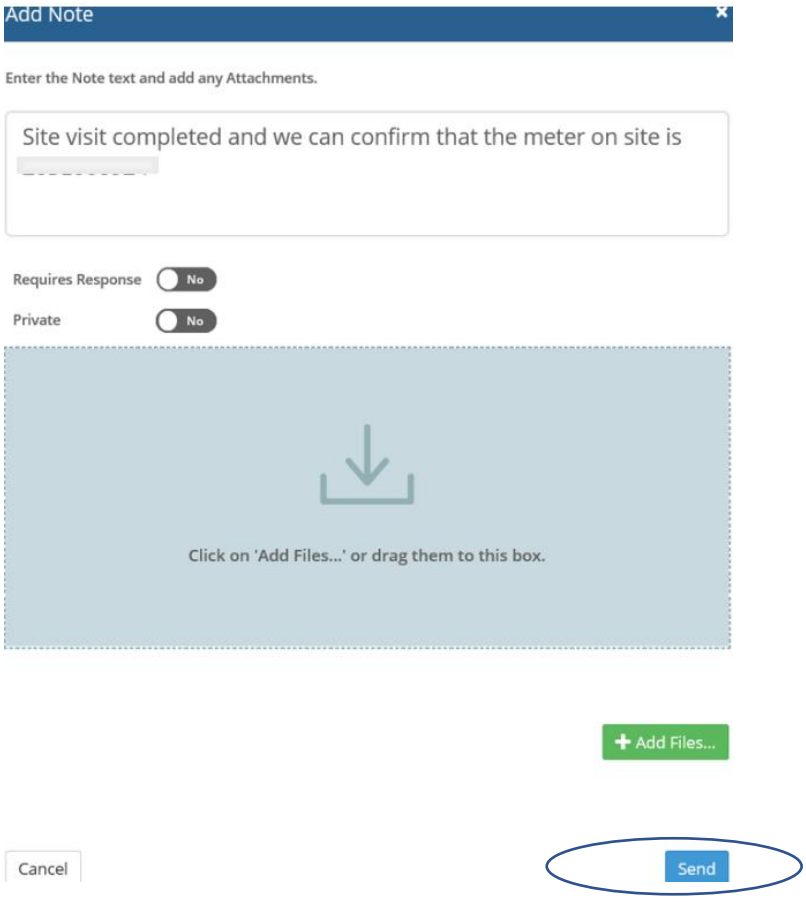
The Metering Service user will have instant visibility of this message that the Associated Supplier sent to them when they log into ECOES. All users within the Metering Service company group will also receive an email via a batch run, notifying them of any unseen updates.



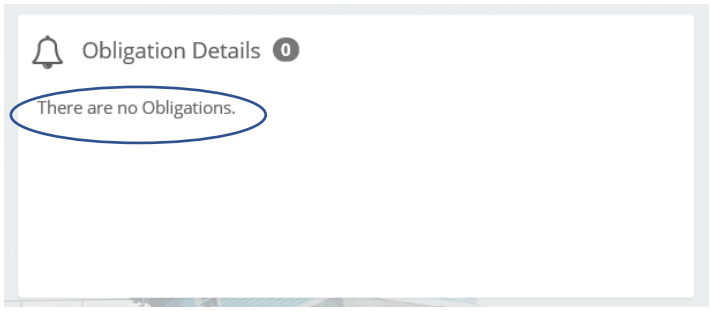
In the below example, the Metering Service is notified that they have two Crossed Meters Cases for their attention. As the Supplier has asked the Metering Service a question, then the Obligation to respond is shown, both in the form of a 'red bell' and status 'Awaiting Response'. The Case related to our example is the top one (CMC00013).



The Metering Service user will be able to click into the address line, review the message details and respond by adding a Note. The Metering Service user will also have the option to insert an attachment – for example, a photograph of the meter, taken during the site visit which confirms the MSN.



A Metering Service user sending this response via the 'Add Note' function will clear the Obligation.



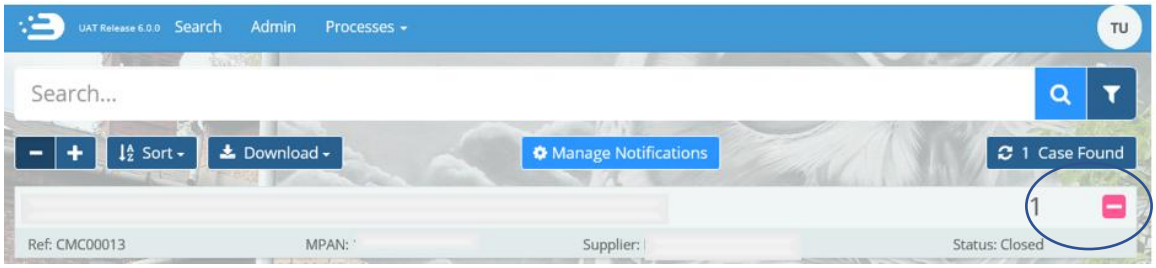
And change the Status back to 'Open'.



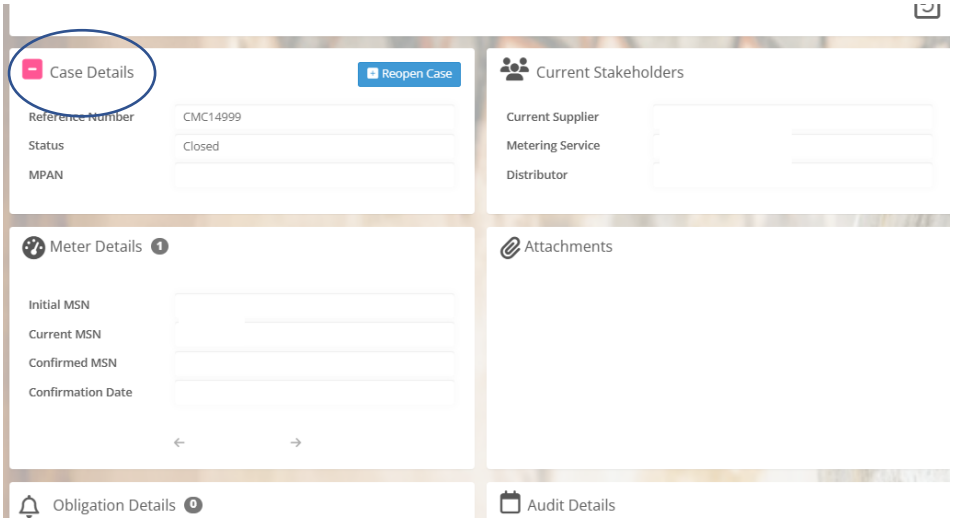
The Metering Services user response will trigger a notification to the Associated Supplier. The Associated Supplier can then work to resolve this Crossed Meters investigation, any further messages raised for the Metering Services attention will be flagged, and the Metering Service user also has the ability to review any follow up communication or actions within each record that is liked to this Case.

Closed Crossed Meters Cases

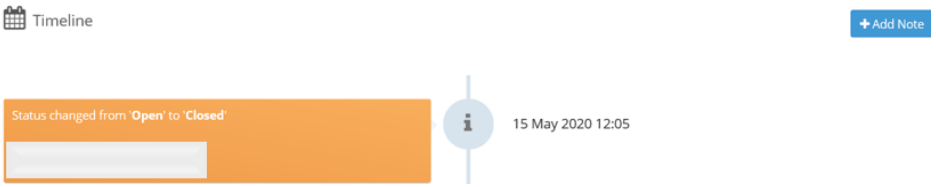
Each Supplier can close their side of the linked Case. When a Supplier closes a Case, it will show as closed within the Crossed Meter's Case list, and the Metering Service will be able to see this providing that their filters are set to show Closed Cases.



The Case Details will now show the Closed Case Symbol .



The Timeline within the Case will also confirm the status change.



Re-opened Crossed Meters Cases

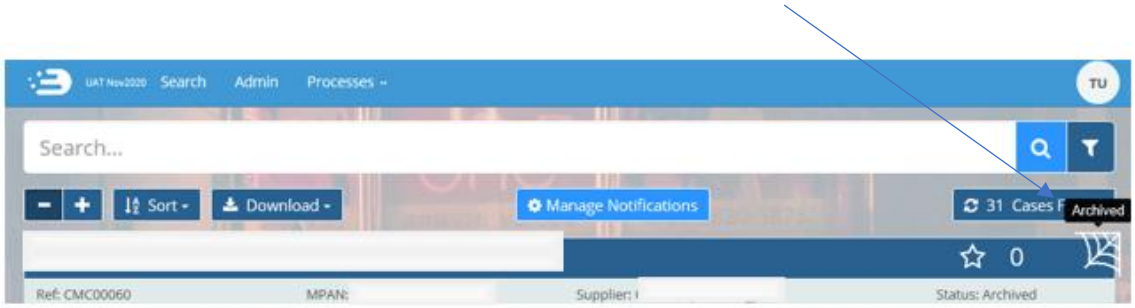
A Case can be re-opened by the current Supplier, by clicking the 'Reopen Case' button. Only the current Supplier can re-open a case for their own MPAN.

When a Case is re-opened, and the Supplier chooses to add a note for the Metering Service with 'Requires Response' selected, the Metering Service users will be notified of the re-opened Case and their obligation to respond to the Suppliers Note.

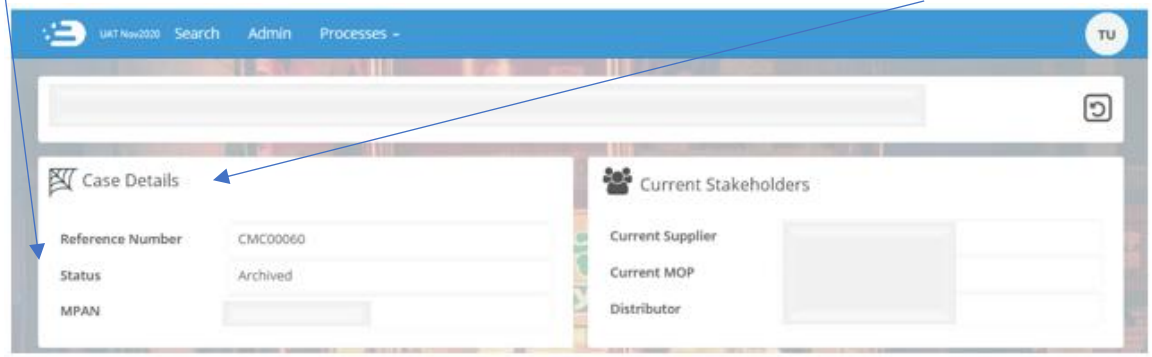
Archived Crossed Meters Cases

A job will be run every day to search for Cases with a 'Closed' status. Where a Case has been Closed for 30 Calendar Days (including weekends) 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.



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

