

DNO - POC Module

Admin & Designer Guide

Version 2

SP Energy Networks



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DNO LOGIN

This document shows the processes for the **Admin** and the **Designer** at the POC stage.

Background

This document shows the processes for the **Admin** and the **Design Engineer** at the POC (Point of Connection) stage.

At this point, we start with the ICP completing the Application/Notification form in RAdAR for which:

- Standard – they will require us to issue a POC quotation
- Dual Offer – the ICP have been appointed after a Customer has paid and accepted the POC element of a Dual Offer Quote.
- Self-Determined – the ICP are determining their own POC

Admin

The Admin role has two processes to complete within the POC Module

- Check Min info
- Register the application (provide a Project Number)

Check Minimum Information

Self-Determined

The Admin role has to verify that the ICP has the appropriate NERS accreditation for this activity and is recorded on our “authorised” list

Company (central) Email *:	<input type="text" value="spenicp@webnet.ltd.uk"/>
Is Active?:	<input checked="" type="checkbox"/>
Is Self Determined :	<input checked="" type="checkbox"/>
Address Line 1 *:	<input type="text" value="ICP Address 1"/>

**If the ICP is asking for information only then minimum information would not be checked the Enquiry would automatically be allocated to a Designer to respond.*

The Admin role has to complete the activities below if the ICP has made their “final submission”.

Dual Offer

The Admin role has to complete the activities below whilst also checking whether this request has already been registered and the ICP needs to be assigned to a pre-existing record.

Standard

Log into the DNO application

- Click POC
- Click REGISTER

The POC Register lists all applications, colour-coded with the most recent at the top. You can ‘search’ the register to narrow down the results by opening up the search area

- Click on the required application by clicking on the enquiry no hyperlink

You can see the application status.

POC Application Status
S3000052_V1

General Information (Hide)

Enquiry No: S6000052_V1
 Applicant's Ref: RunDMC
 Applicant's Name: Demo ICP
 Application Type: Fully Adopted
 Site Name: Sian Williams
 Site Address: Sian Williams
 POC Classification: LV Demand
 Requested Load (kVA): 10
 Date Requested: 29/05/2013 09:45:00
 Quote Status: Original
 OS Grid Ref (X,Y): 123456,456454
 Date Received:

Items	Stages	POC Status	Date	Comments
1	Request	Quotation Requested	29/05/2013 09:45:00	
2	Register	Compliant Request Received		Pending
		Registration		Pending
3	Design	SLC15.5 Min Info Checked		Pending
		Last Additional Info requested		Pending
		Last Additional Info received		Pending
		Last Clock Paused		Pending
		Last Clock Restarted		Pending
		Additional Info Request Completed		Pending
4	Issue	Formal Offer Issued		Pending

The first step for an application received in RADAR is for Admin to check that the application passes the minimum information check. Admin would need to:

- Click 'Check Min Info' (under the 'admin' header – not the 'designers') In

the 'Check Application Minimum Info' page:

You can view notes from the ICP, the Application form and any attachments by clicking on View All/Metered Form

Documents

Admin would need to check the Self-Determination options and ensure that the ICP is checked against our "authorised" list and has the appropriate NERS accreditation/attended SPEN workshop.

Please complete Self Determination options

Design * : Closing Joints * :

Divisions * : Enabling Works * :

Inspections * : Operational Support * :

AddInfo Supplied : No Yes

Company (central) Email * :

Is Active?:

Is Self Determined :

Address Line 1 * :

Based on that information you then need to decide whether to approve the application. For Self-determined or Dual Offer options you would need to “acknowledge” receipt of the forms after having completed the checks.

Field	Description
Min info checked by	The name of the person who checked the min info – i.e. the admin person
No of working days elapsed before actioned	Working days elapsed until Admin Min Info actioned
Application min info status	<ul style="list-style-type: none"> • Not Approved • Approved • Acknowledged
Reason for non-compliance - Only applies when 'Not Approved' is selected in previous question.	A list of reasons why the application has failed
Additional comments	Free text box for you to enter further information

- Click
- Once you have 'saved', click

A notification will be sent to the ICP to either acknowledge receipt or advise whether the application has passed or not, dependent on the type of form. They will be asked to re-submit if they have failed the minimum information check.


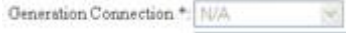
If it has passed then the next step is for the application to be registered – see next section.

Note: Checking the minimum information on a Resubmitted application is exactly the same as on a new one, but the system will re-name the documents with version numbers (same enquiry number with V2 for example).


Register the application

The application gets 'Registered' once it has passed the minimum information check.

- Choose from the main menu
- Click the button and allocate an Admin user
- The designer will be auto allocated, based on postcode. However, if you wish you can reallocate at this stage, by clicking allocate next to the auto allocated designers name and selecting a new designer
- Type in the (select the button which auto-generates) this is like a group number that any quotes for the same site will share, so they share the project number but have individual enquiry numbers
- Type in the this number is generated from SAP

- Contestable closing joint works, will be auto populated from the application form
- SPEN licensed area will be auto populated
- Choose the 
- The  will be auto populated from the application form if applicable
- Complete any comments/notes if required

Comments/Notes:

- Click 

The Applicant will be sent a notification advising them of the Project Number.



This is the end of the Admin role at this stage and the process now passes to the Design team

Designer

From the POC Application Status page:

- Click 

There are three parts to this process:

- Application Min Info Check (check for Technical info)
- Design Additional Info Check
- Design Brief

This process is completed for "Standard" POC application forms however if the Applicant has completed a:

- **"Dual Offer" form then the Designer would check that the request and design match the quote offer issued under the Licensed "Dual Offer" Quote. If so the design would need to be "acknowledged".**

If there are any variations then the Designer would need to review with the customer and potentially pass to a Quantity Surveyor (QS) to produce a variation or refund.

- **"Self-determined" form then the Designer would not take any action at this point unless the Applicant was asking for any information or it had submitted a "final submission".**

If the Applicant requests information the Designer would obtain and respond via RAdAR. If they have completed the "final submission" they would complete the activities below.

Application Minimum Information Check

Check Application SLC15.5 Min Info

Check Application SLC15.5 Min Info
Design Additional Info Check
Design Brief

General Information (Show)

Application Documents (Hide)

View File	Doc Type	Description/Comment	File size (KB)	Date Added	Date Submitted
sitelocationplan.docx	Application		10	29/05/2013	29/05/2013
siteboundary.docx	Application		10	29/05/2013	29/05/2013

Validate Min Info (design) for Application

*** Required Fields**

Min Info Checked By:

SLC15.5 Min Info Due Date:

No of working days Elapsed before Actioned:

SLC15.5 Min Info Checked *:

Date SLC15.5 Min Info Checked:

Any Comments:

Notes on Minimum Information (Show)

- View the attached documents & ensure they match the requirements (min info). There are two possible outcomes:
 - Min Info Not Approved
 - Min Info approved

Min Info Not Approved

If the minimum info has **not** been approved:

- Choose 'Not Approved' from the drop-down

Validate Compliance

Min Info Checked By:

No of working days Elapsed before Actioned:

Acknowledgement/Compliant Application Status:

Date Acknowledgement/Compliant Application Confirmed:

Additional Comments:

Notes on Minimum Information for

- Choose a 'Reason for Failure'
- There is also the option to type in 'Additional comments' and to view **General Information (Show)** if required

SLC15.5 Min Info
Check

- Click

The applicant will receive notification to advise they have failed the minimum information and will need to re-submit their application to proceed with the request.

Min Info Approved

- Choose 'Approved' from the drop-down Minimum Info Checked *:
- You can type in additional comments & view **General Information (Show)** if required

**SLC15.5 Min Info
Check**

- Click

If you have approved the application:

- Click

View the attached documents & ensure they match the requirements. Either you:

- Require additional information
- Do not require additional information
- Tick the boxes, as applicable Additional information required : Yes No

Additional Information Required

Additional information required : Yes No

If additional Information is required:

- You must enter a description of what is required in the

box

Current Entry

- Click .

- Once you have added a comment and 'Saved', put a tick in the box

Select to Submit

It is important that you tick 'YES' to pause the clock

Yes No

Send Info to ICP

- Click to send the request to the ICP/Applicant

The ICP must upload the additional documents within **20 working days**. Failure to do this will result in the application being automatically cancelled.

See next section for instructions once the additional information has been received.

Additional Information Received

When the additional information has been sent, a notification will be received.

- Login to the DNO Application and click 'POC' then 'Register'
- Locate the required project and click on the underlined enquiry number S_8008
- Click

The min info would have already been 'approved' so:

- Click
- Tick the required boxes. as applicable
Additional information required : Yes No
- If no further information is needed then it is important that you click 'YES'
to Do you want to Restart Clock?: Yes No
- then click YES to Additional information requirement complete : Yes No
- IMPORTANT once the above has been completed, please ensure you click save and not submit to ICP.

NOTE: once you have clicked YES to 'Additional Info requirement complete' you **cannot** request further information.

-

No Additional Information Required

Additional information required : Yes No

Once you are happy with the documentation received:

- Click YES to Additional information requirement complete : Yes No

NOTE: once you have clicked YES to 'Additional Info requirement complete' you **cannot** request further information.

Current Entry

- Click

Allocate/re-allocate a designer

- The designer will be auto populated but you can reallocate if you wish by clicking & choose the Design Engineer from the drop-down
- Choose the
- Choose the
- Check the
- Confirm the
- If required you can enter any additional comments in the comments box

- Click Sent to System Design Group : if 33kV, (EHV scheme) and complete the relevant System Design Group information.
- Initial POC Completed : Yes No – Click **YES** to continue
- Click

Design Brief

- Click to complete your design.

Process Formal Offer

For Standard or SPEN works identified on Self-determined options

- Click
- Click
- Reallocate a designer if required
- Choose the 'Status for the revision of POC Information and Firm Quotation'

No Action	When we don't need to issue a Formal Offer, i.e. cancelled.
Issued	Clicking 'Issued' progresses the project onto the next step – we would do this when we have provided the POC Quote and the appropriate documents
Issued/Exempted	Used when we have not been able to issue the quote in the agreed timescales (due to storms etc) but are exempt from the SCL15 standards
Interactive	When more than one ICP is issued with the same POC

Upload your Quotation

- To upload your quotation, click
- Click next to 'Issued to Applicant' Doc Upload For : Issued to Applicant DNO use only
- Type in a description of what you are uploading
- Select a File : *
- Locate the file you wish to upload, double click on the required file
- Click
- Repeat the steps as required
- Click
- Click
- Repeat the steps as required
- Click
- Click to save & submit to the ICP

What happens next?

For a Metered application, the applicant would then review the POC Quote; they have 3 months to accept the quotation or 6 months if a request is made for the POC to be extended. If they accept the quote they must make payment on accepting the quotation.

Acknowledge Formal Offer

If the POC is accepted by the ICP (applicant), then they need to send us the following:

- Signed & dated POC quotation acceptance docs
- Confirmation of ICP & developers registered address
- Confirmation from the developer that the ICP has been appointed as the preferred ICP
- Payment Information & proof of payment (method/date/value)

The next step is for us to acknowledge receipt of acceptance as soon as their payment has been confirmed as cleared.

To do this, from the POC application status screen:

- Formal Offer Status**
- Click
 - View all documents
 - Tick Acknowledge FO *:
 - Type in FO acceptance Comments *:
 - Click

What happens next?

The applicant would then issue the design of the contestable works within 30 days, from date of acceptance. If a **phased approval** has been agreed then the ICP must submit the **first part** of the phased approval within 30 days. This is covered in the Design module.

Please refer to the 'design' handout for more information.