High Level Process Guidance for Virtual Lead Party/Supplier Pre-Qualification Process

Introduction

This document is designed to give a high-level overview of the VLP and Supplier pre-qualification process and detail individual steps required within the process.

Please also review all the guidance and supporting documentation on the website

https://www.nationalgrideso.com/balancing-services/wider-access

Virtual Lead Party (VLP) – Secondary BMU(s)

Building your application

The Salesforce Guidance Document is on the website here and will help you complete your application

1. Complete Use of System Application and send to the Transmission Connections Team. The team will process this and provide you with the invoice. Once this invoice is paid, you will be issued with CUSC accession (if required) and a VLP Agreement to sign. You will sign and return these documents to the team for NGESO countersignature and date. Once these documents have been countersigned by NGESO and returned to yourselves you will need them to upload with your pre-qualification application. Further information regarding this process, and details on how to contact the team can be found here - https://www.nationalgrideso.com/industry-information/connections/use-system-uos-and-virtual-lead-party-vlp

2. Request salesforce portal access (if required) to begin building your pre-qualification application (link on the website). You can start your pre-qualification application in parallel with completing the relevant documentation mentioned above with the connections team. You will need to upload the completed documentation signed by both counterparties to be able to submit your application.
3. Speak to Elexon, they have processes which you will need to ensure you follow in parallel to NGESO processes. Be aware that Elexon will have process timescales and deadlines which you will need to be aware of when completing NGESO processes.
4. Once your application is complete, please ask your Contract Manager to check this for you, any amendments can then be made.
5. Submit your application to NGESO via the portal and notify your Contract Manager. This changes your application status from "in progress" to "submitted" and starts the clock on your 5-month pre-qualification process.

Application Week 1-8

1. NGESO will now complete the required checks for your application. This includes checking asset information with the DNO.
2. If there is any missing information, your Contract Manager will contact you.
3. If you are using the WA API, you will be asked to provide names for the API sandbox development environment. API development starts from here.
4. Your Contract Manager will send you a Wider Access Information Request Form. This needs to be completed for each sub asset. This includes the required Trading Agent (TA), Trading Point (TP) and Control Point (CP) information. If you have a large number of sub assets to register then you will still be required to complete the Request Form for all TA, TP and CP details, however we will issue you a spreadsheet to capture all the sub asset information.

5. Your Contract Manager will enter all the additional information provided into your application in Salesforce on your behalf and begin the asset checks with the DNO.
6. You will need to contact the Operational Metering Team to begin Operational Metering requirements for your connection. You will be sent a proforma to complete and return to the team.
7. Once the checks are complete, your application will be approved. Salesforce will auto-generate your Secondary BMU ID(s). You will receive an automated email; however, it is likely your Contract Manager will also contact you and share this information.

Application Week 8-21

1. Now you have your SBMU ID you will need to register this unit(s) with Elexon.
2. Elexon will complete their registration and then send NGESO BMU Registration Team completed BSCP forms.
3. BMU Registration Team will now register your assets, the completed BSCP form(s) from Elexon are required before units can be uploaded into NGESO systems – often referred to as the SORT upload.

   SORT uploads are currently every 8 weeks and include a process deadline to allow for file transfers and dress rehearsals.

   The SORT upload and deadline dates are published in the registration guide on the website. These can be found here on page 23 - https://www.nationalgrideso.com/document/150281/download

4. If you are using the WA API, all WA API units must pass BPITS test before they can be uploaded into SORT. The Registration Team will issue you with a valid certificate.
5. You will need to return the Operational Metering Proforma to the team and have this validated by the SORT upload deadline date.
6. Once your unit(s) have been uploaded into SORT, you will complete final end to end testing and a date will be agreed between all parties for when you will go live in the BM.

Supplier – Additional BMU(s)

Building your application

1. Complete the relevant documentation with the Transmission Connections team if required. If you already have a CUSC accession, please ensure you have a copy of this, as this will be needed for your application.
2. Speak to Elexon, they have their own processes which you will need to ensure you follow in parallel to NGESO processes. Be aware that Elexon will have process timescales and deadlines which you will need to be aware of when completing NGESO processes.
3. Contact the BMU Registration Team via your Contract Manager to request an additional BMU Registration Form.
4. Send a copy of your CUSC accession to your Contract Manager.
5. Complete an additional BMU Registration Form for each of the ABMU(s) you are looking to register.
6. The BMU Registration Team will process this for you and assign you with your additional BMU ID(s).
7. The BMU Registration Team will create and submit a salesforce application on your behalf.
8. Once this application is submitted, if you are using the WA API, you will be asked to provide names for the API sandbox development environment. API development starts from here.
9. You will need to contact the Operational Metering Team to begin Operational Metering requirements for your connection. You will be sent a proforma to complete and return to the team.
10. Your application will be approved.
11. As soon as you have your ABMU ID(s) you will need to register the unit(s) with Elexon.
12. Elexon will complete their registration and then send NGESO BMU Registration Team completed BSCP forms.

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13. BMU Registration Team will complete NGESO asset registration, the completed BSCP form(s) from Elexon are required before units can be uploaded into NGESO systems – often referred to as the SORT upload.

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14. If you are using the WA API, all WA API units must pass BPITS test before they can be uploaded into SORT. The Registration Team will issue you with a valid certificate.
15. You will need to return the Operational Metering Proforma to the team and have this validated by the SORT upload deadline date.
16. Once your unit(s) have been uploaded into SORT, you will complete final end to end testing and a date will be agreed between all parties for when you will go live in the BM.