ESO

Connections Portal Q&As January 2023

Purpose of document

Q&As taken from 'Connections Portal – Early Adopter' Webinars held 19th January & 23rd January 2023.

Q&As

Account access & structure

- Can we use a single Portal login for multiple applicant companies? We use individual SPVs for each project so technically they are separate.

  We will be able to set that up for you in your account. i.e. set up your credentials as the 'parent' account and then your SPVs underneath as 'child' accounts. This structure should already exist in our CRM system. Once you have logged into your account, please advise us of any changes needed*

- Will you automatically add subsidiaries under parent company, or will we need to confirm which subsidiaries should be included under the parent?

  Please see answer above.

- We use consultants to help prepare applications - can they have access and be able to prepare the applications but only a key member of the company has the rights to submit or change any details whilst our consultants have a read only access?

  We do not have functionality yet to provide a read only access. Users granted access to your account will be able to prepare and submit applications. There is an option to leave applications in a 'draft' status if you agree with your consultant to save applications at this stage. In our next development phase, we will be looking further into consultant access.

Pre application

- Can an application be made without first going through the pre application steps?

  There is no need to make a pre application before making an application.

- Can you submit multiple pre applications by multiple users?

  Yes, but you have to make a separate pre application for each in the Portal.

Application submissions

- We don't have to use the Portal for all new applications from 30 January - but this is an option / recommended. Is that correct? e.g. if we've started one on spreadsheet form which we don't manage to submit by 29 January, can we still submit via existing route rather than Portal?

  We will be looking for you to submit all your applications via the Portal during the BETA phase. If there is a major issue with the system, we will be able to bypass it, however as part of the Early Adopter group the expectation is to use the Portal for all applications. Any submissions from 30th January must be submitted via the Portal. Any application made before this date will be processed as normal away from the Portal.

- Will we still be able to submit applications "the old way" during this BETA phase should we need to?

  Please see answer above.

- Can we see drafts created by other users in our company?

  Yes, you will be able to see drafts and active applications for all users within your company.

- Will other users in my company be able to see my applications and will I be able to see theirs?

  Please see answer above.

- What happens if NGESO or NGET require clarification - would you have to delete the application and reapply?

  We have the ability to make minor adjustments in the background system if additional information is required. You can speak to our administration team or your dedicated CCM to do this.

- Who can reset a submitted application for editing if you spot an error after the submission?

  Our administration team can help with minor changes in our background system if required. You can speak to our administration team or your dedicated CCM to do this.

- Can we use the Portal to look at existing applications that have already been applied for and are being progressed? (they may be under a client company)

  You will only be able to track progress on applications submitted via the Portal. However, for anything in flight currently, once it is contracted you will be able to see it in the Portal, as well as any historic projects.

- Will existing applications be transferred into this new dashboard system? (it would be quite useful)

  Please see answer above.

- Do I understand it correctly that any change to the application would trigger an alert and that this notification would be sent to all the users for our company, not just the user who has submitted that application?

  The notifications will be sent according to:

  Application notifications - User submitting the application
  Clock start notification - commercial contact detailed in the application

- Does the fee calculator include 23/24 prices now?

  The Portal will be linking to the most up to date fee calculator available, as published on the NGESO website. The Application Fee calculator is produced by our Connections Charging team who can be contacted at transmissionconnectioncharging@nationalgrideso.com for any specific charging queries.

Modification applications

- What would happen for Modification Applications after March for projects that are already contracted? Can they be moved to the Portal?

  You will be able to modify any contracted projects via the Portal. All contracted positions you have will be visible in the Portal.

Project Progression / Statement of Works

- Does the Portal support submission of multiple sites under one PP?

  No, the Portal does not support this. You have to apply for a PP against each individual site.

- What about submitting a PP before the previous PP is signed? This is quite common for us.

  No, the Portal does not support this. The PP has to complete its process to signing before a new one can be submitted.

- Are we able to submit multiple, concurrent PPs per GSP?

  No, the Portal does not support this. You have to apply for a PP against each individual site.

- Are we able to submit a simultaneous modification application and PP?

  No, the Portal does not support this. The Mod / PP has to complete its process to signing before a new one can be submitted.

- Can we set up a template modification application / project progression on which we base our applications?

  This is not a functionality available in this release. We are happy to consider for future development - the current thought process is to move away from templates as this can lead to potential errors / duplication in application submissions.

- Would the Portal show the status of PP / SoW applications made via a DNO or only applications made directly to ESO?

  The status of PP / SoW would be visible only to the DNO applying.

- Will embedded generators be able to kick off the SoW through the Portal or does the DNO only do this?

  Functionality is currently built for DNOs only, but we are happy to take feedback on this for future releases.

Invoicing

- Will the invoice still be sent by email/letter too?

  Yes, you will get a copy of the invoice via email as well. This will be system generated in a later release.

- Will the invoice be automatically sent out to the company accounts teams, or do we have to download it and forward it on?

  You will get an email copy as usual but will have the option to download also.

- Can I see that the application fee has been paid in the Portal?

  Yes, you will be able to see this information.

- Can you upload a remittance notice of an Advance Payment before the invoice is ready?

  You will be able to upload any documents relevant to the application that you would send in as you would today. Our administration team will then process any submitted documents as they would normally. The current clock start process relies on our Finance teams to confirm payment of invoice so sending the remittance may not affect clock start. As this a process related question, please speak to your dedicated CCM if you required further clarification.

- Are we allowed to make advance payment before an invoice is issued?

  As this a process related question, please speak to your dedicated CCM for further clarification. Please bear in mind the Portal has not been designed to change current processes; it has digitised and automated the current Connections processes.

Competency

- Can I see when an application is declared competent in the Portal?

  Yes, you will be able to see this information in the Portal.

- If the application is declared not competent, will it show that status on the system, and the reason why?

  No, the Portal does not yet have this functionality. You will be informed of non-competency via our administration team as per the process today.

Clock Start

- Are clock starts generated through the system?

  Clock starts will be generated by the system however it will be a manual input push by our administration team as our finance systems are not yet linked with the Portal. i.e. to confirm invoice has been paid.

Compliance

- Will the Compliance Process for construction phase projects be adopted into this Portal in the future?

  Yes, we are currently working with the Compliance team to develop the next phase of the Portal.

General

- Will we be able to request meetings with NGESO and NGET through the Portal, particularly for contracted projects?

  Not currently. This is something we would look to develop for a future phase as we improve the interaction ability of the Portal.

- It will be useful to have all queries we raise and answers also recorded within the project data, so we have clear transparency

  This will be available as part of the release in March.

- Who (our Contracts manager?) will update the current stage/status of the application & project and how soon will it be updated - as soon as there is a change to the status?

  Any changes made by your CCM or our administration team will be instantly visible.

- Are there email notifications/alerts of changes in the system (i.e. clock starts and invoice being available etc) or do we need to keep checking?

  Clock start is notified both within the Portal and via email. Invoice is email only for now. Notifications are something we are keen to have feedback on – volume, stages etc.

- If an application is made for BELLA/BEGA in the BETA phase, will it transfer to the full live system?

  Yes, it will – the BETA phase is really just early access to the Portal for a select number of customers. The launch in March is to open up access to all ESO customers with some added functionality. The underlying system is live from 30th January and will remain so.

- Is there an option to see whether the application fee has been out turned or not? Would this system also help to speed up the variable application fees outturns?

  This functionality is not currently available in the system, but we can certainly feed this into the next phases of development.

- Will this Early Adopter phase mostly target just the use of the Portal and ability to submit applications, rather than testing the entire application process (that would take around 3 months at least)?

  Correct, this phase will primarily focus on the above owing to the Connections process licensed timeframes.

** Please email transmissionconnections@nationalgrideso.com with the subject line: 'Connections Portal BETA Support'*