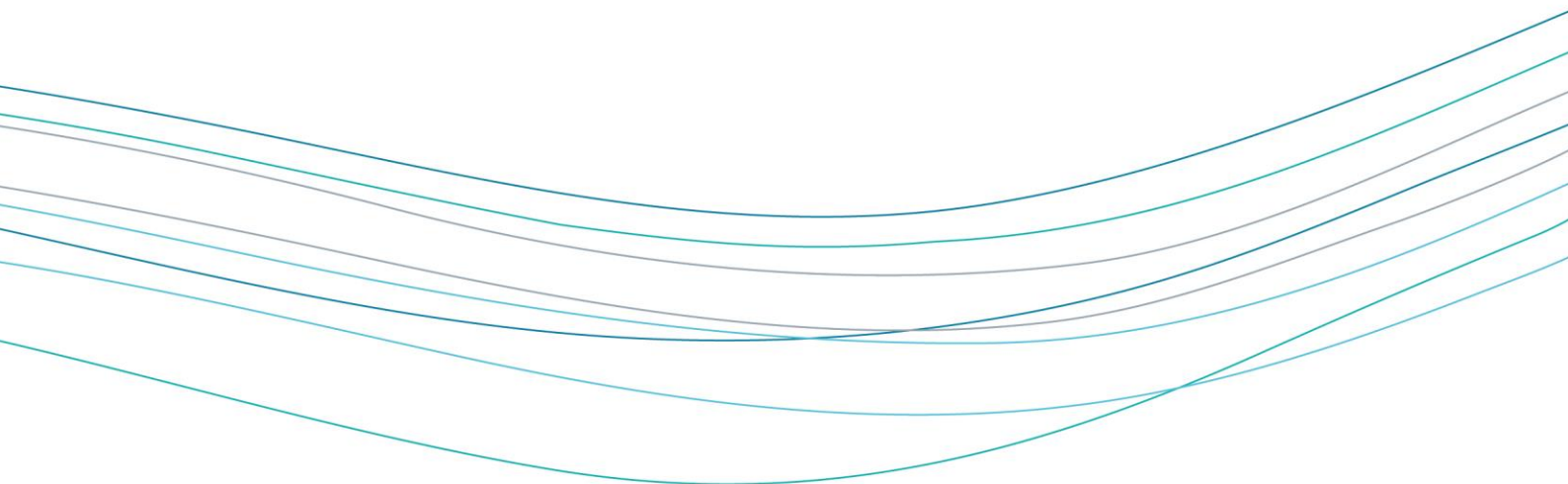


How to create and update opt in/out agreements for Interim Supplier Allocation (ISA)

Version 1.0



Content

Process Overview

This document is a guide for all trading parties who would like to submit an interim supplier allocation (ISA) contract or update an existing contract, for an interim supply event. This document describes the steps on how to create ISA opt in agreements, or how to update existing agreements.

Before proceeding, please note that in order to follow the described process steps, the correct access to CMOS and KissFlow are required.

Step descriptions

Step	Process step	System
	<p>1. Locating active Interim Supply agreements within CMOS</p> <p>Before creating a new agreement please make sure there is not already an existing agreement in CMOS. Otherwise an error will occur when trying to submit a new request.</p> <p>Navigate to the Search agreement screen as follows:</p> <ul style="list-style-type: none"> ◆ Select 'Administration' on the CMOS home screen ◆ Select 'Participant Management' ◆ Select 'Search Agreements' <p>To search for Interim Supply agreements;</p> <p>Retailers: Select Primary organisation (Insert – Trading Party Name) and Agreement Type (Insert – Interim Supply opt in)</p> <p>Wholesalers: Select Secondary organisation (Insert – Trading Party Name) and Agreement Type (Insert – Interim Supply opt in)</p> <p>This will then bring up any active Interim Supply contracts.</p>	<p>CMOS</p>

If you have an agreement in place but is reflecting the opposite status, please see step 4. and ensure a KissFlow request is raised for this to be updated.

2. Creating a new Interim Supply agreement

To create an Interim Supply opt in agreement, select the **'Create Agreement'** screen.

Navigate to the **Create agreement** screen as follows:

- ◆ Select **'Administration'** on the CMOS home screen
- ◆ Select **'Participant Management'**
- ◆ Select **'Create Agreement'**

3. Setting up an agreement

CMOS

Select the Agreement type from the drop-down list and select **'Interim Supply opt in'**.

After you have selected the Agreement type, the Status and Effective From Date will auto populate.

Populate the other fields as follows:

- ◆ Primary organisation
- ◆ Secondary organisation
- ◆ Service
- ◆ Status
- ◆ Effective From
- ◆ Effective To

Click the **'Submit'** button to create the agreement. You will be presented with the Search agreements screen with the message **'Your action is successful'** above it.

<p>4. Notifying MOSL</p>	<p>Once the agreement is submitted, this will then need to be logged on KissFlow. On the KissFlow homepage, select the red circle icon on the right-hand side of the screen.</p>	<p>KissFlow</p>
<p>5. Initiating an App.</p>	<p>After selecting the icon, a new window will open with a list of app requests that can be raised.</p> <p>To create a new request, select the ‘Interim Supply Allocation – Opt In/Out’ App and click on the ‘Initiate’ button.</p>	<p>KissFlow</p>
<p>6. Creating an Interim Supply Allocation</p>	<p>Once selected, you will be directed to another webpage containing the Interim Supply Form.</p> <p>To opt in, ensure that ‘Yes’ is selected to the question: ‘Do you wish to opt in to the List of Opted In Retailers for the purpose of Interim Supply Allocations?’</p> <p>To opt out, ensure that ‘Yes’ is selected to the question: ‘Do you wish to opt out of the List of Opted In retailers for the purpose of Interim Supply Allocations?’</p> <p><u>Please ensure you do not select ‘Yes’ to both opt in and opt out. This will be rejected, and the form will need to be filled out again.</u></p> <p>Next, please select the appropriate answers to the following questions:</p> <p>‘Have you submitted an Interim Supply Opt In Agreement in CMOS for each Area you wish to opt in?’</p> <p>‘Have you provided Ofwat with a revised Statement of Interim Supply Capacity?’ (please add as an attachment to this form)</p> <p>Populate the other fields as follows:</p>	<p>KissFlow</p>

	<ul style="list-style-type: none">◆ Acquiring Licensee (If required)◆ Applicant Details for Opting In (Mandatory)◆ Opt In Details (Mandatory)◆ Declaration (Mandatory)◆ Attachments (If required)	
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7. Submitting request

KissFlow

Once all relevant details have been filled in click on the **'Submit'** button to send request to MOSL.