

## User Admission **Steps for Traders**

Step One - Validation

Has to be completed before moving to Step Two

Customer to submit Customer Application Form (CAF) to the Customer Life Cycle team. Once validation checks are complete, the User Admission fee is payable

It is recommended that the Shipper obligations within the Uniform Network Code (UNC) are considered

(Click here to view

Step Two - Confidentiality Documentation

Has to be completed before moving to Step Three

(Click here for an example)

**Confidentiality Agreement** sent to the customer

**Confidentiality Agreement** signed and returned

**Confidentiality Agreement** to be countersigned by National Grid Transmission – one copy returned to the customer

Upon return of all confidentiality documentation, credit contacts for Xoserve and National Grid Transmission can be issued

This guide has been designed to support you through the various steps required in order to become a gas Trader.

Click on each box with a red triangle to view an example of the agreement or contract in question.

We are continually seeking to improve our customer's experience so if you have any feedback on this document or any aspect of the User Admission process pease let us know.

Submit your feedback to the Customer Life Cycle team via customerlifecycle.spa@xoserve.com

Step Three - Accession Documentation

This can be completed in conjunction with Step Four

(Click here for an example)

Accession and UK Link **Users Agreement (UUA)** sent to customer to be signed and returned

(Click here for an example)

Legal Opinion obtained

A Legal Opinion is only required if the company is registered outside of England and Wales

(Click here for an example)

Transmission Accession Agreement signed by Transmission - one copy returned to the customer

Customer can discuss IX Security and Energy Balancing arrangements
with Xoserve

Step Four - Information Exchange Arrangements (IX)

This can be completed in conjunction with Step Three

Customer confirms IX works to be undertaken and indicative timescales discussed

Security lodged with

Xoserve's Credit and Risk

Management Team for

Energy Balancing

IX Installation Agreement or Sharing Agreement sent to customer

(Click here for an example)

IX Installation Agreement or Sharing Agreement signed & returned

(Click here for an example)

Credit Limit, Security for IX Installation and annual Risk Management Team

IX Installation Agreement countersigned by Xoserve or IX Sharing Agreement held on file

Xoserve's Service Provider confirms IX arrangements for customer and undertakes delivery

Customer Invoiced for IX works and annual maintenance in accordance with IX Installation Agreement

Step Five - Final Steps for Accession to Uniform Network Code and DSC

All other Steps need to be completed before moving to Step 5

System accounts, Gemini XP1 and E-Training set up, and details provided to customer

Go Live - Customer becomes a UNC Trader and **DSC Party** 

Trader may now request DSC Additional Services via appropriate Request Forms

Kev:

Information

Customer

Customer Life Cycle

Transmission and Distribution Networks

Credit and Risk Management Team

**Other Service Providers** 

GO GO GO!