



NAV Portal user guide

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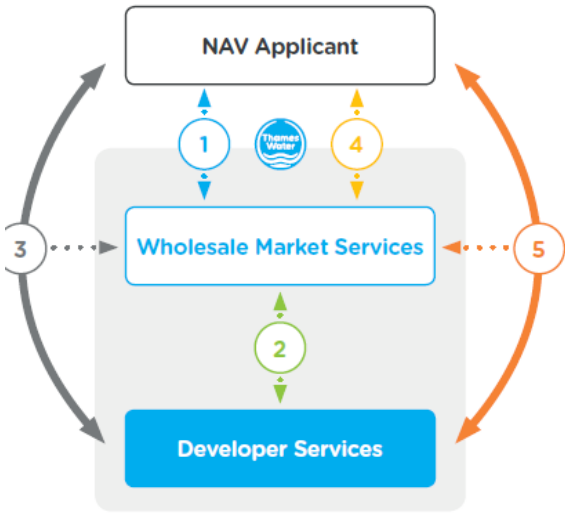
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Note – the use of the word ‘you’ refers to the NAV customer unless specified differently in the business scenario heading on each exercise.

Also the screen shots in this manual have been taken from the NAV ADMIN profile and may look slightly different for a NAV USER profile.

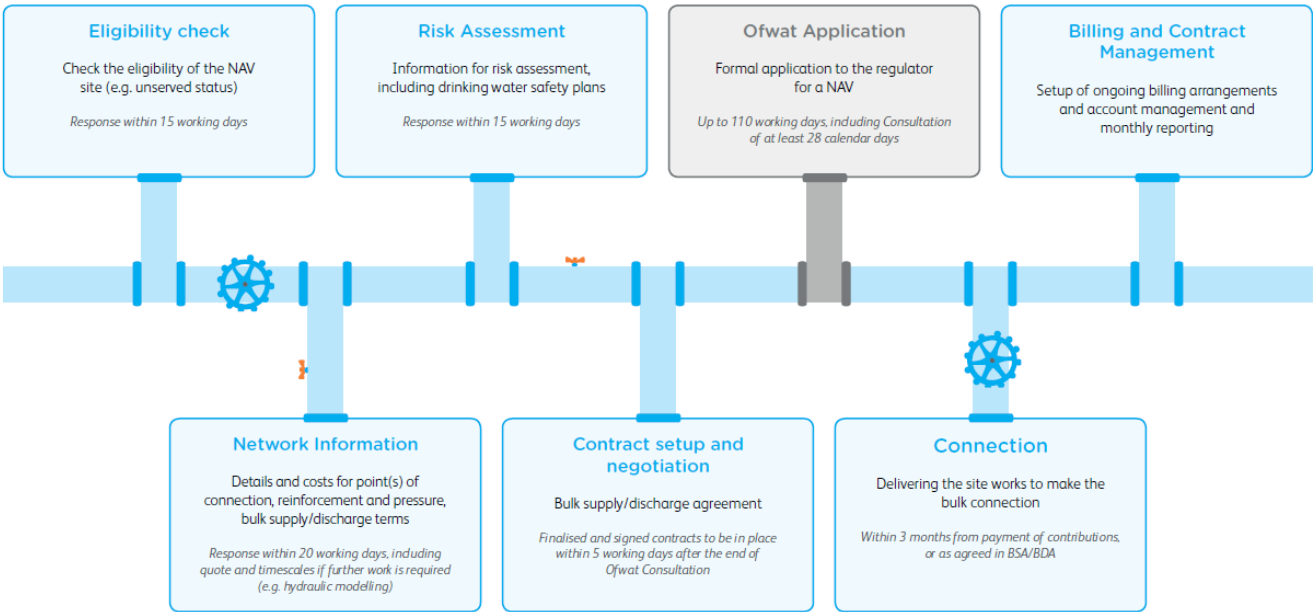
Introduction

NAV Market Interfaces



- 1 Pre-development:** WMS act as the first port of call for application forms, queries and updates for the NAV Applicant.
- 2 Services:** WMS proactively manage service requests (like modelling or cost estimates) from Developer Services on behalf of the NAV Applicant.
- 3 Follow-up:** Developer Services may contact the NAV Applicant directly to request further technical information or clarifications. WMS should be copied in on any communications.
- 4 Contract:** WMS work with the NAV Applicant to set up the bulk supply contract and billing arrangements.
- 5 Delivery:** Delivery teams within Developer Services interact directly with the NAV Applicant to facilitate site works – communications and updates fed to WMS.

NAV Application Timeline



Application form guidance notes – Clean water bulk supply

These guidance notes explain why we need the information we're requesting. Please read them in relation to the relevant section of the form.

1. NAV applicant details

This section should be completed with the details of the person responsible for setting up the NAV site. We'll contact this person in relation to any quotation as well as issue such quotations to this address unless you inform us otherwise.

2. Location details

We need full details of the site to be connected, together with any relevant contact details of third party land owners.

3. Contamination and site issues

We must safeguard against contamination of water supplied through our pipes. The supply pipe should not be laid in, on, or pass through any areas which might cause contamination including the following: foul soil, refuse and refuse chutes, ash pits, sewers, drains, cesspools or inspection chambers. Where the ground is classified as contaminated (e.g. reclaimed land sites), or the supply pipe is close to a petrol or oil source, an alternative pipe material is used. A soils report may be required to determine the type of pipe material that should be installed.

We ask that you share any information you have of known issues that may affect the feasibility and/or timescales for providing a bulk supply to the NAV site.

4. Traffic management

We're required to carry out traffic management to ensure that our work can be carried out in a safe way, and to ensure the flow of road and pedestrian traffic is disrupted as little as possible.

Traffic management can include, but is not limited to: road closures, lane closures, lane rental, parking bay suspensions, and traffic management drawings.

Parking bays, including residential bays and loading bays, may be suspended for us to be able to work safely. The number of bays on either side of the road will be determined by us and our contractor, and depends on the width of the road, the location of the water main, and the flow of traffic around our works and vehicles.

We're charged for traffic management by the local authority as an additional cost for carrying out work. We include these additional charges into your quotation where applicable.

5. Existing supplies

If there are any existing supplies on site, please provide us with details, including any meter number(s) and customer account number(s). This will enable us to update our records accurately.

6. Eligibility

Complete this section to request an eligibility check.

7. Request for Network Information

Complete this section to request network information – we'll suggest a technical solution with a budget estimate and any price and non-price terms for the bulk supply.

8. Supply requirements

Please provide details of the supply requirements and types of premises so that we can determine the tariffs and charges for a bulk supply.

The standard material used in new NAV connections is High Performance Polyethylene (HPPE) or an approved barrier pipe if the site is contaminated or the ground conditions require it.

If you have any fire flow requirements, please provide us details of these in section D.

9. Site phasing

Please provide us details of any site phasing you're proposing, so that we can produce the appropriate design and quotation.

10. Site plans

We'll need you to provide an electronic site plan in 'dwg' or 'dgn' format. The scale should be between 1:200 and 1:500 and the plan needs to clearly show the following:

- Site outline
- The proposed point(s) of connection for the bulk supply, if you have this information
- All assets to be adopted, where applicable
- Phasing, where applicable

This will enable us to provide you with the correct quotation and design for the bulk supply and carry out eligibility checks / consenting.

11. Health and safety

Under the Construction Design and Management (CDM) Regulations 2015 we require the name and contact details of the principal contractors and designer, and a copy of your health and safety plan. Although this may not be known at application stage, we'll need this information before we commence our work on site.

Application form guidance notes – Wastewater bulk supply

These guidance notes explain why we need the information we're requesting. Please read them in relation to the relevant section of the form.

1. NAV applicant details

This section should be completed with the details of the person responsible for setting up the NAV site. We'll contact this person in relation to any quotation as well as issue such quotations to this address unless you inform us otherwise.

2. Location details

We need full details of the site to be connected, together with any relevant contact details of third party land owners.

3. Site issues

We ask that you share any information you have of known issues that may affect the feasibility and/or timescales for providing a bulk discharge to the NAV site.

4. Traffic management

We're required to carry out traffic management to ensure that our work can be carried out in a safe way, and to ensure the flow of road and pedestrian traffic is disrupted as little as possible.

Traffic management can include, but is not limited to: road closures, lane closures, lane rental, parking bay suspensions, and traffic management drawings.

Parking bays, including residential bays and loading bays, may be suspended for us to be able to work safely. The number of bays on either side of the road will be determined by us and our contractor, and depends on the width of the road, the location of the sewer, and the flow of traffic around our works and vehicles.

We're charged for traffic management by the local authority as an additional cost for carrying out work. We include these additional charges into your quotation where applicable.

5. Existing supplies

If there are any existing connections on site, please provide us with details and any customer account number(s). This will enable us to update our records accurately.

6. Eligibility

Complete this section to request an eligibility check.

7. Request for Network Information

Complete this section to request network information – we'll suggest a technical solution with a budget estimate and any price and non-price terms for the bulk discharge.

8. Site phasing

Please provide us details of any site phasing you're proposing, so that we can produce the appropriate design and quotation.

9. Site plans

We'll need you to provide an electronic site plan in 'dwg' or 'dgn' format. The scale should be between 1:200 and 1:500 and the plan needs to clearly show the following:

- Site outline
- The proposed point(s) of discharge for the bulk discharge, if you have this information
- All assets to be adopted, where applicable
- Phasing, where applicable

This will enable us to provide you with the correct quotation and design for the bulk discharge and carry out eligibility checks / consenting.

10. Surface water drainage

Please tell us how you're planning to discharge surface water, so that we can design appropriate bulk connections and set up the correct billing once the new connection has been laid. Surface water is rainwater that falls onto your site and runs into the public sewer via guttering and drainpipes.

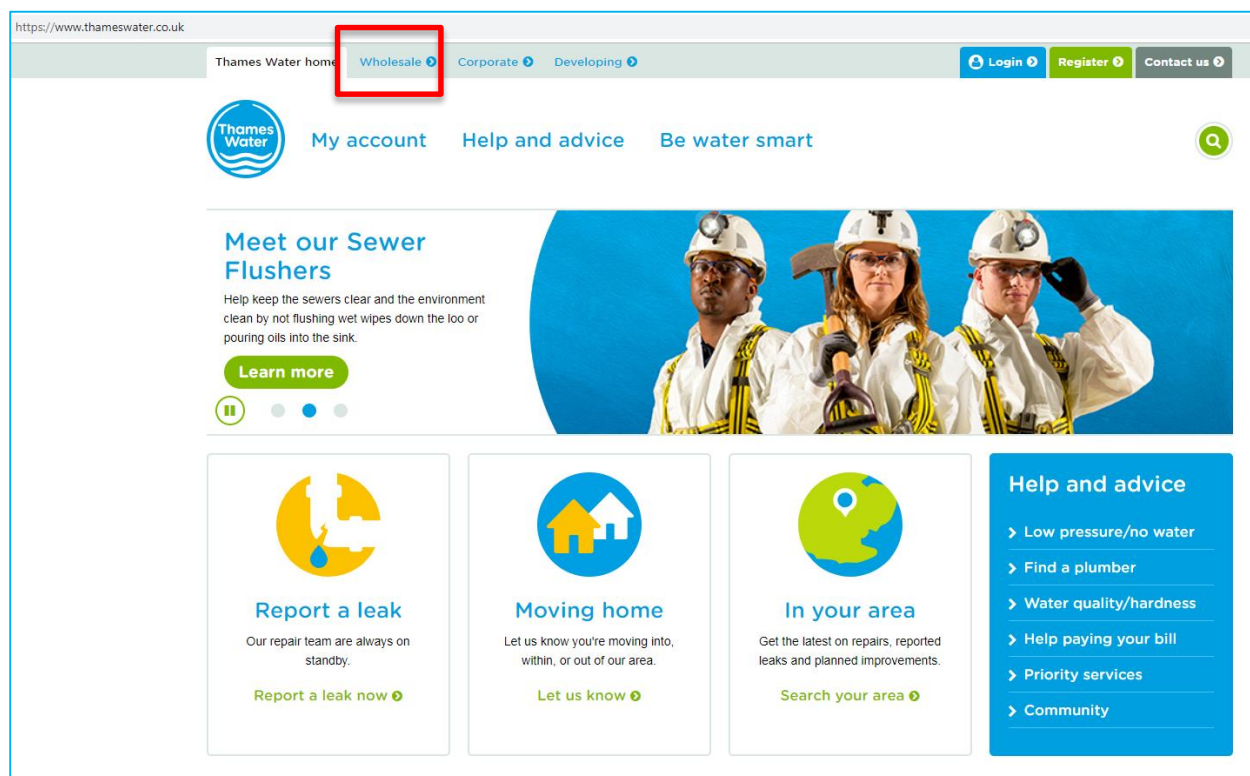
11. Connection to our sewerage network

Most developers and NAV undertakers carry out their own off-site work to connect their site with our sewerage network. However, if you would like us to do this, you can request a quotation and confirm your wish to proceed by completing this section.

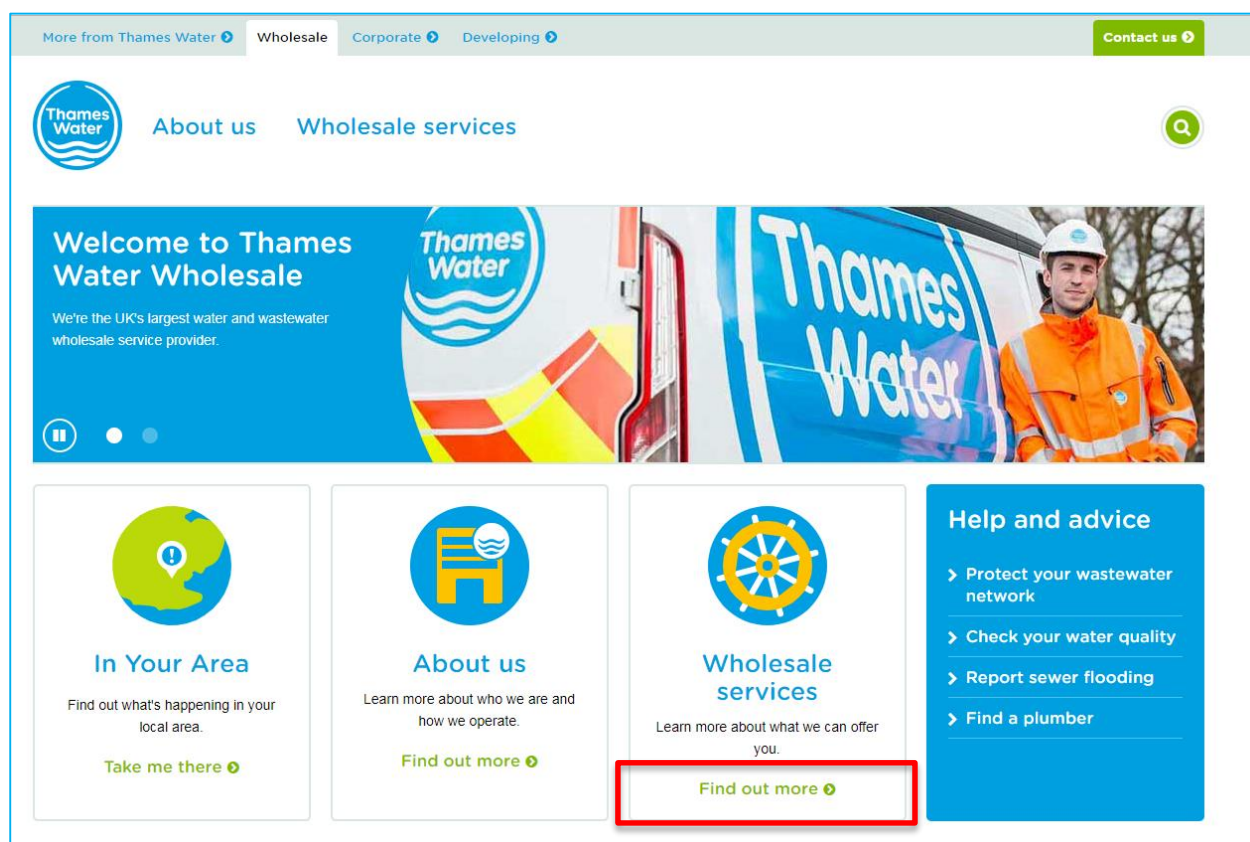
12. Health and safety

Under the Construction Design and Management (CDM) Regulations 2015 we require the name and contact details of the principal contractors and designer, and a copy of your health and safety plan. Although this may not be known at application stage, we'll need this information before we commence our work on site.

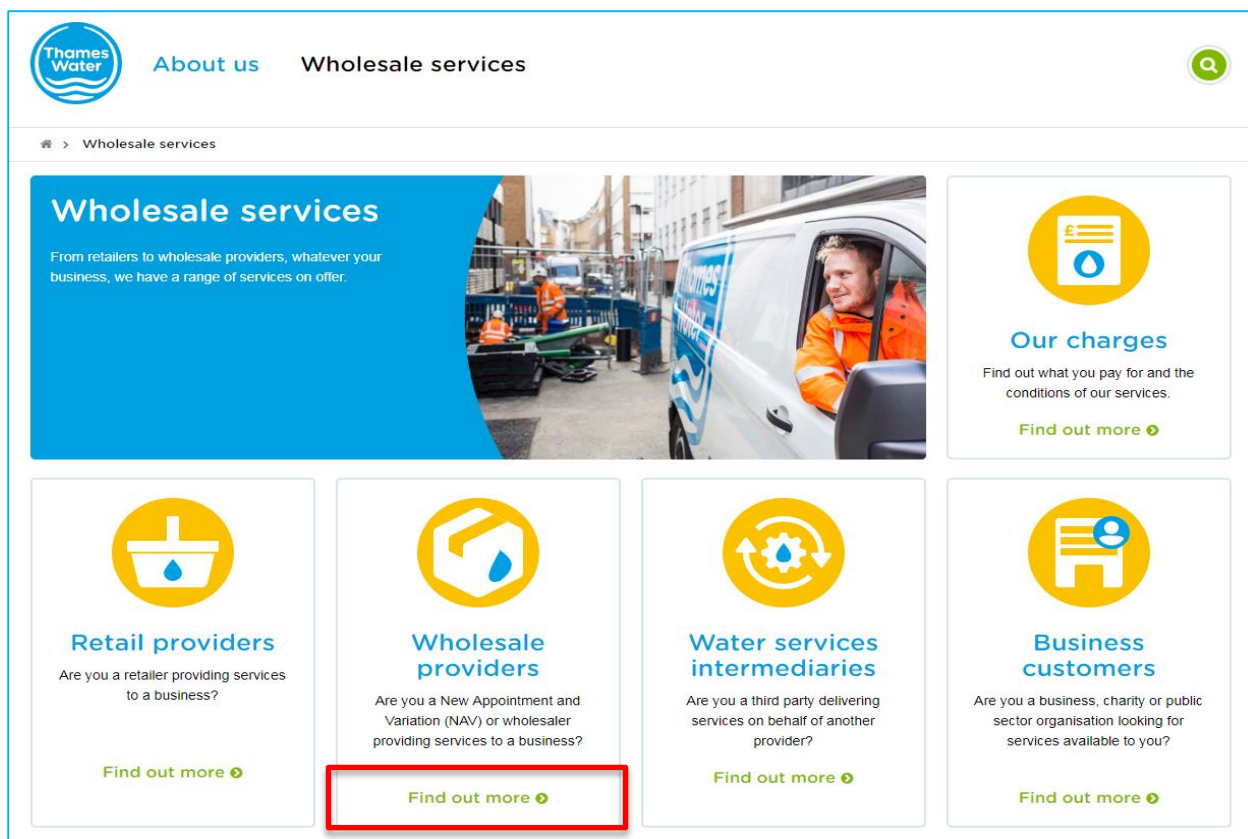
Where to find more on the Thames Water website



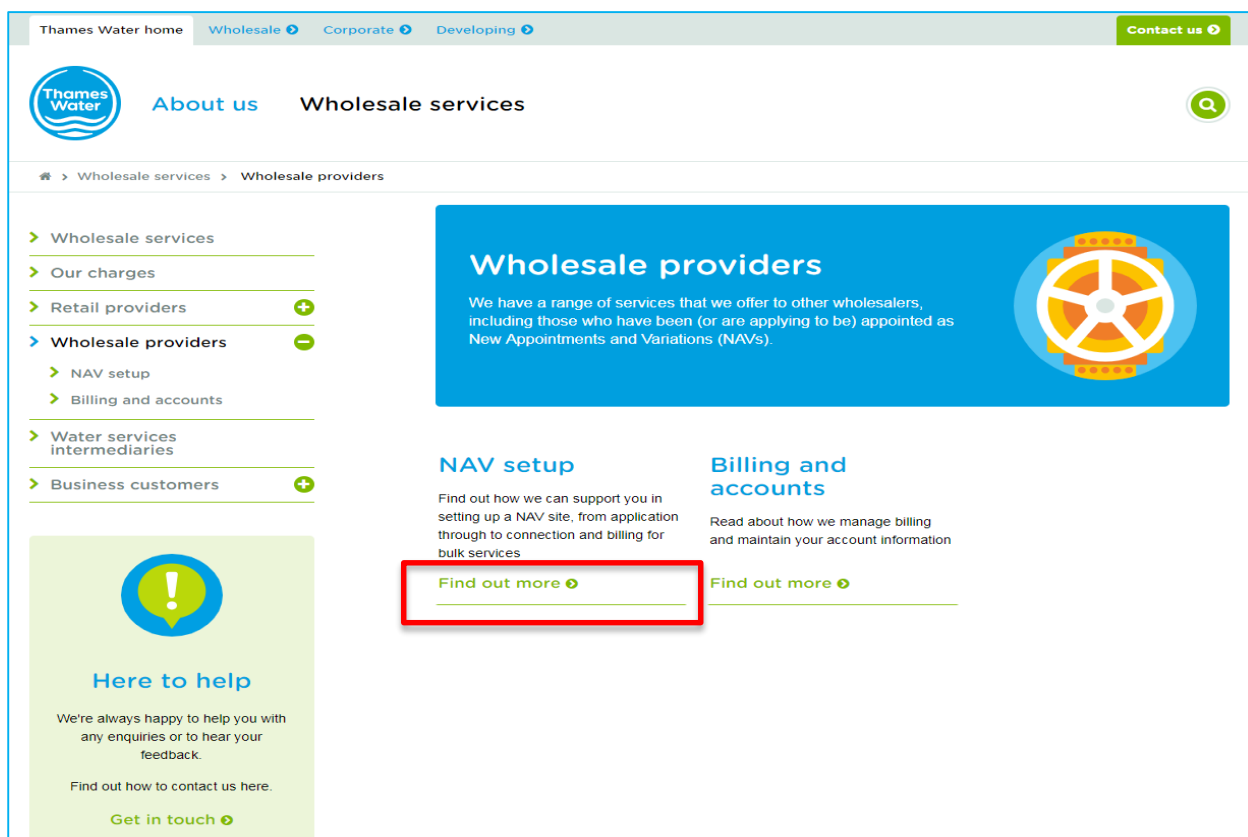
1. Select the Wholesale tab from the Thames Water website (<https://www.thameswater.co.uk/>)



2. Select 'Find out more' under the Wholesale services heading




3. Select 'Find out more' under the Wholesale providers heading




4. Select 'Find out more' under the NAV setup heading

NAV set up page on Thames Water website



About us

Wholesale services



» Wholesale services

» Wholesale providers

» NAV setup

» Wholesale services

» Our charges

» Retail providers


» Wholesale providers

» NAV setup

» Billing and accounts

» Water services intermediaries

» Business customers



Here to help

We're always happy to help you with any enquiries or to hear your feedback.

Find out how to contact us here.

Get in touch

NAV setup

In order to make your application to Ofwat for the new appointment, you'll need some information from us as the incumbent water and/or sewerage company. The information below describes how you can request this. If you're looking to make a bulk connection with our network(s), we can also help you set up the bulk agreement(s), arrange for any site-work and set you up as our customer.

A site will be eligible for applying for a new appointment and variation if it is:

- unserved;
- for a large user; or
- given consent by the incumbent water and/or sewerage company.


NAV market interfaces and application timeline

For more information on how to apply for a new appointment or variation please see the [Ofwat guidance](#).


Forms

The services listed below reflect Ofwat's guidance and these can be requested all at once, or one by one, using these forms.

Tip: Download and save the relevant form, adding the name of the site to the filename. The form can be completed digitally, so there's no need to print and scan paper copies. Also, the same form can be submitted for each service request, so you don't have to fill out the same fields every time. If you'd like to discuss your form prior to submitting it, please contact Wholesale Market Services [here](#).



Setting up a water bulk supply for NAVs form



Setting up a wastewater bulk discharge for NAVs form

Checking if your site is unserved

Large users

Providing consent as the incumbent undertaker

Network information

Risk assessment information

Setting up a bulk supply / discharge agreement

Getting you connected


Account setup

Exercise 1: How to log into the NAV Portal if you have an Office 365 account

Business scenario

You want to log into the NAV Portal for the first time and you have:

- already been given a user name and password
- an Office365 account


	<p>Access can be provided by:</p> <ul style="list-style-type: none">• A NAV customer, as all will have at least one person set up as an administrator. The administrator profile will be able to create further users for their company.• Thames Water Wholesale Market Services Administrator
---	--


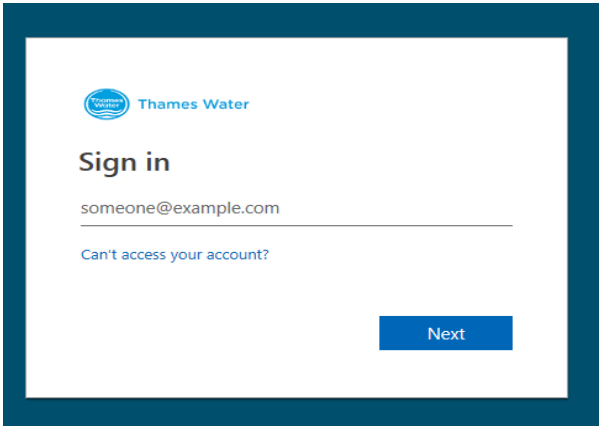
Learning outcome

By the end of this exercise, you will be able to log into the NAV Portal to access the landing page

Steps

Logging into the NAV Portal

1. Click on either  Google Chrome or  Firefox
2. Type in <https://wmsportal.thameswater.co.uk>

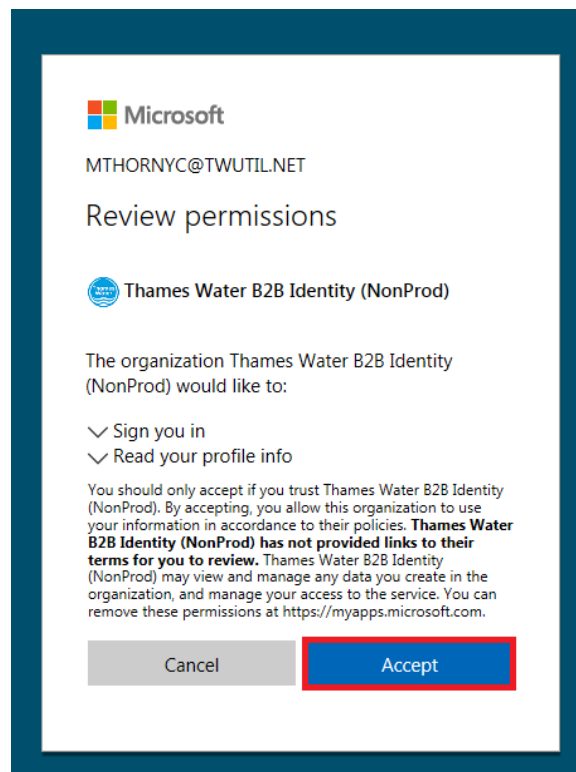
	<p>The Login to your account screen will be displayed.</p> <div data-bbox="534 1355 1136 1780"></div>
---	--

3. Sign in by typing in your email address

4. Click 



The Review Permissions screen will be displayed.

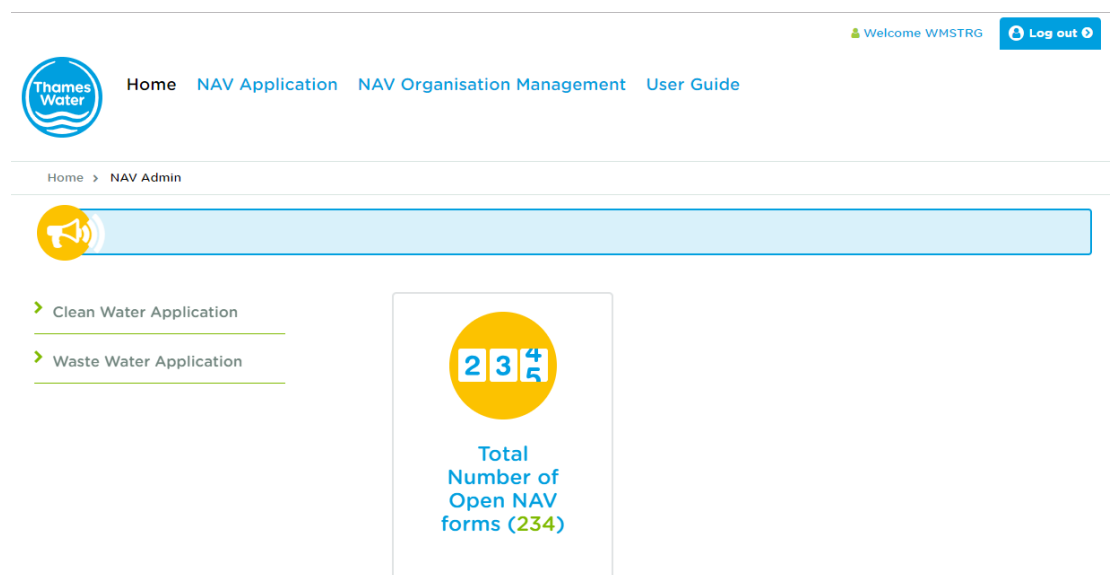


5. Click

Accept



The landing page will be displayed.

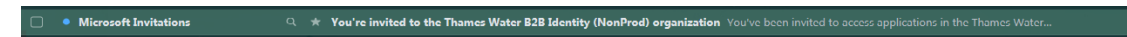


Exercise 2: How to log on the first time without an Office365 account

Business scenario

You want to log into the NAV Portal for the first time but do not have an Office365 account.

You have received a “Microsoft Invitation” email; this will help you set up your access to Office365.



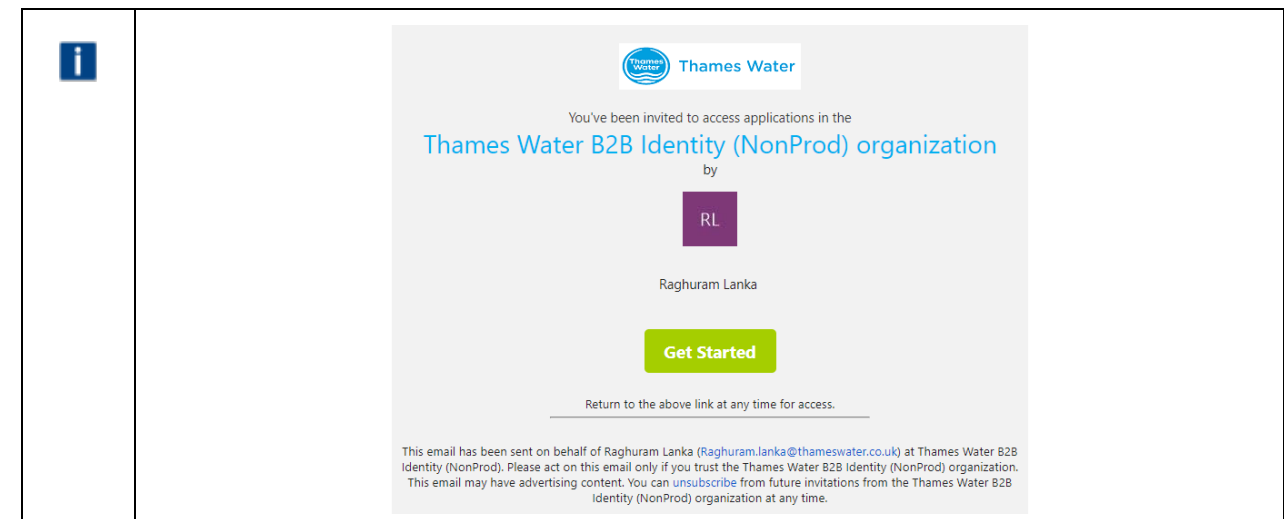
Learning outcome

By the end of this exercise you will be able to log into the NAV Portal and change your password, if required.

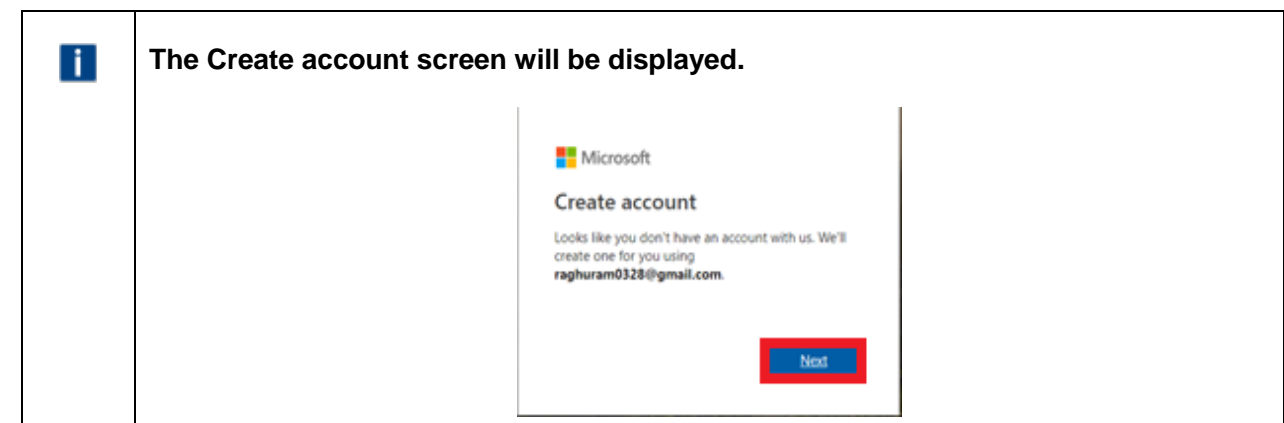
Steps

Logging into the NAV Portal


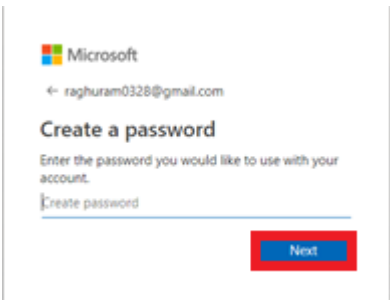
1. Open the invitation you received by email

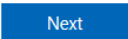



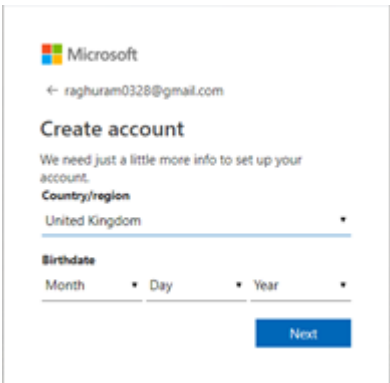
2. Click 




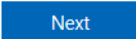



3. Click 


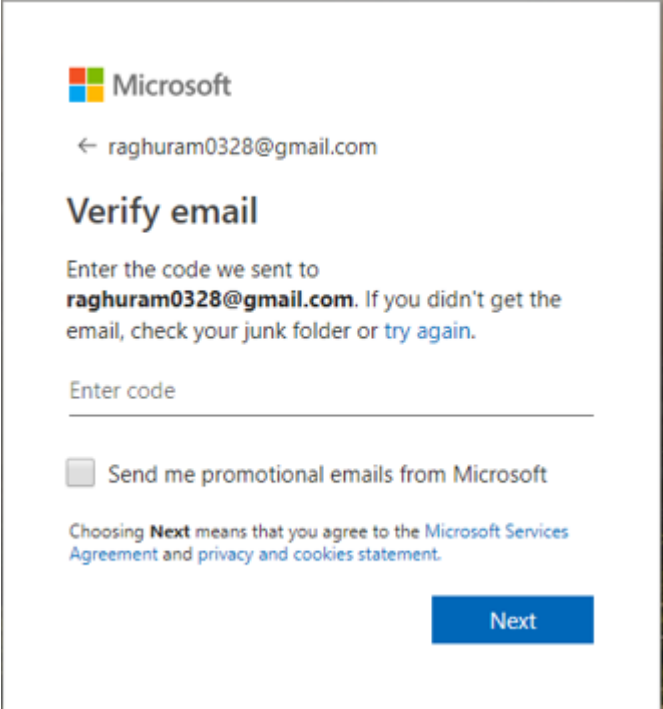
	<p>The Create a password screen will be displayed.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: 60%;">  </div>
---	---

4. Click in **Create password**
5. Type in your password
6. Click 

	<p>The Create account screen will be displayed.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: 60%;">  </div>
---	---

7. Click **Country/region**
8. Click 
9. Select your Country, e.g. United Kingdom
10. Click **Birthdate**
11. Click  to select the month
12. Click  to select the day
13. Click  to select the year
14. Click 

	<p>Note:</p> <p>A verification code will be sent to your email address. This code is required for the next stage of the process.</p>
---	---


	<p>The Verify email screen will be displayed.</p> <div data-bbox="502 508 1168 1214">  </div>
---	---


15. Click [Enter code](#)

16. Type in the code

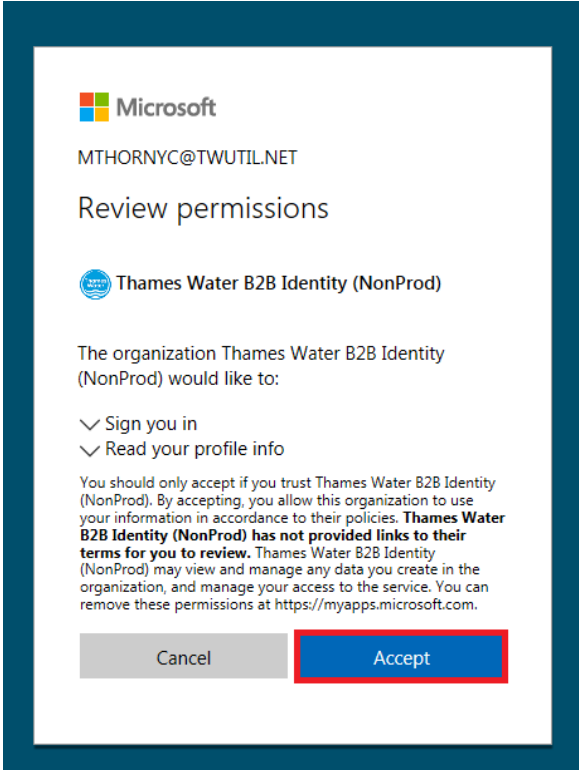
17. Click [Next](#)

	<p>The Create Account Captiva screen will be displayed.</p> <div data-bbox="632 1570 1040 2013">  </div>
---	---


18. Click into the blank space provided
19. Type in the code that is displayed on the screen
20. Click 



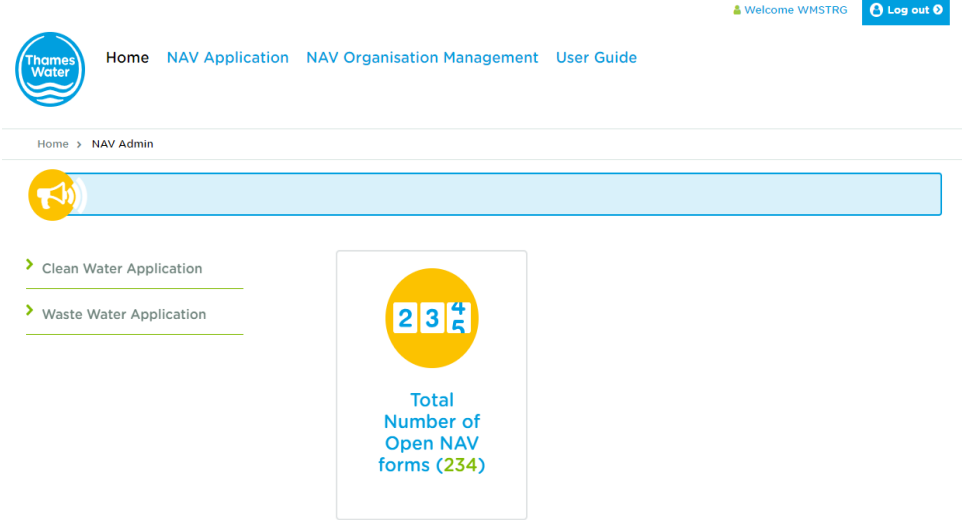
The Review Permissions screen will be displayed.



21. Click 



The landing page will be displayed.



Exercise 3: How to create a new clean water application request

Business scenario

You are already logged into the WMS Portal and would like to submit a new application to Thames Water via the online Portal.

Learning outcome

By the end of this exercise you will be able to submit a new clean water application request via the online Portal.

General awareness

Depending on the type of request you are making, the sections of the form that are required will alter accordingly. The different forms are as follows:

- An eligibility check on your proposed area
- An eligibility check on your proposed area at the same time as a budget estimate
- An eligibility check on your proposed area at the same time as a formal quote
- Risk assessment information
- A Bulk supply agreement
- A connection

It is expected that you will submit an eligibility check at the same time as either a budget estimate or a formal quote. If you submit an eligibility check on its own, the system will force you to then submit a budget estimate before being allowed to request a formal quote.


As you complete the online form, fields that you miss that are marked as required will be highlighted immediately as shown below. You will not be able to submit an application with any required fields not completed.

The screenshot shows a form with two fields. The first field is labeled 'Site address:' with a red 'required' label below it. The field itself is empty and has a red border. Below the field is a red text prompt: 'Please provide site address'. The second field is labeled 'Postcode:' with a blue 'required' label below it. The field contains the text 'AA1 1AA' and has a blue border.


Steps

- Where to find the clean water application form
- How to submit a request for an eligibility check
- How to submit a request for eligibility check and budget estimate
- How to submit a request for eligibility check and formal quote
- How to submit risk assessment information
- How to submit a bulk supply agreement request
- How to submit a connection request

Where to find the clean water application form




From the landing page



Home NAV Application NAV Organisation Management User Guide

Welcome WMSTRG [Log out](#)

Home > NAV Admin




> Clean Water Application

> Waste Water Application

234

Total Number of Open NAV forms (234)

1. Click 'Clean Water Application'



The application form will be displayed.

Set up a clean water bulk supply arrangements for new appointments and variations(NAVs)

About the form

This form has been split into multiple sections. Which sections will display is dependent on the service that you are requesting, Throughout this form you will be able to request:

- An eligibility check on your proposed area
- An eligibility check on your proposed area at the same time as a budget estimate
- An eligibility check on your proposed area at the same time as a formal quote
- Risk assessment information
- A Bulk supply Agreement
- A connection

You will not be able to skip vital stages in the application processes, meaning that you will not see all options. As you move through the application, the form will pre populate from the previous stage, please ensure ALL information is up to date and accurate.

Should you have any questions relating to this form, please review the user guide or contact your account manager who will be able to assist.

What service would you like to request?
Please use dropdown to select
required

Request For Eligibility check

Section A - Contact details

Section B - Site details

Section C - Eligibility

Comments

Additional Comments:

Attachments

1

Choose File

Q Browse

Please zip all files you wish to upload to accompany your application.
You can upload one zip file at each stage of your application, therefore please ensure we have the most up to date documents at every stage.

Checklist

I confirm, attached to this application within the zipped file I have uploaded is:

☐ A site plan clearly outlining our proposed/area and the boundaries

☐ A build profile for the proposed area

☐ A map outlining our preferred point of connection

☐ A site phasing plan for the proposed area

☐ The onsite mains design including pipe sizes and lengths

☐ Any other accompanying documents relating to your application

Submit







NOTE – once you select a particular service, the form will populate with the relevant sections that require completion



How to submit a request for an eligibility check

1. This is the initial default form when you select the 'Clean Water Application' option as shown above.

	<div>Section A - Contact details </div>
---	--

2. Click the  on the 'Section A - Contact details' section – these should default to you details when your profile was created so you may only need to complete the Address and Postcode fields.

	<div>The contact details section</div> <div><div>Section A - Contact details </div><div>Please provide us with the contact details of the best person to contact regarding this application</div><div><div>Name of key contact: <i>required</i></div><div>WMSTRG</div></div><div><div>Company: <i>required</i></div><div>NAV TEST</div></div><div><div>Address: <i>required</i></div><div>A place A town</div></div><div><div>Postcode: <i>required</i></div><div>AA1 1AA</div></div><div><div>Telephone number: <i>required</i></div><div>07777777777</div></div><div><div>Email: <i>required</i></div><div>WMSTRG.01@thameswater.co.uk</div></div></div> <div>Section B - Site details </div>
---	--

3. Update or amend as required though. Click  to close, or open the next section, 'Section B – Site details' by clicking on the  option.



The site details section

Section B - Site details



Please provide us with the location details of the proposed area of appointment. This includes third party land, Contamination, Traffic Management and Existing supplies.

Site Name:

required

Site address:

required

Postcode:

required

Grid reference:

required

Planning application number:

required

Will any bulk discharge connection(s) need to go through third party land to reach the NAV site?

required

☐ Yes ☐ No

Contamination and site issues

Are you aware of any contamination, conservation or archaeological issues relating to this site or its surrounding areas?

required

☐ Yes ☐ No

Traffic management

Are there any parking bays of any kind in the vicinity of the site?

required

☐ Yes ☐ No

Existing supplies

Are there any existing supplies at the site?

required

☐ Yes ☐ No

Section C - Eligibility





IMPORTANT

Further drop down fields will appear if you select Yes to any answers above. If you are unsure at this stage select Yes and use tbc if the required fields.

You will not be able to submit an application if any required fields have not been completed.

4. Complete accordingly and a  required. Click  to close, or open the next section, 'Section C - Eligibility' by clicking on the  option.

**The eligibility section**

Section C - Eligibility

Please indicate under which criterion you are intending to apply to Ofwat to become the new appointee for this site:

required

☐ Unserved – please go to subsection i) below

☐ Large user – please go to subsection ii) below

☐ Consent – please go to subsection iii) below

i) Unserved criteria:


Please include in your upload of documents, a site map which clearly outlines the boundaries of the site. If the site is not Greenfield, ensure you supply an explanation as to why you consider the 'Unserved' criterion applies and any evidence. This may include plans for demolition or capping of existing pipework



ii) Large user:


Please contact Wholesale Market Services with information including details of the customer who is considered to be a 'Large user', so that we can make arrangements for the accounts to be transitioned.


iii) Consent:

You will need to request consent from us for the area you are looking to serve. Please contact Wholesale Market Services with information including 'Supply requirements', 'Site Phasing' and 'Site Plans'.

Comments

5. Select the criteria you are applying to Ofwat under and then click  to close, or open the next section, 'Comments' by clicking on the  option.

**The comments and upload attachments section**

Comments


No comments given


Additional Comments:

Attachments

1

Choose File






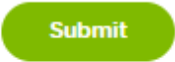
 Browse

Please zip all files you wish to upload to accompany your application.

You can upload one zip file at each stage of your application, therefore please ensure we have the most up to date documents at every stage.

6. The comments view will show as 'no comments given' at this stage, however, you are able to add an additional comments in the 'Additional Comments' field. You can also add any attachments at this stage.

	<p>IMPORTANT</p> <p>Additional comments will overwrite any previous comment added and the last comment shown when the stage is completed will then be captured in the View .</p> <p>Please zip all the files you wish to upload to accompany your application.</p> <p>You can upload one zip file at each stage of your application, therefore, please ensure we have the most up to date documents at every stage.</p>
---	--

	<p>The checklist section</p> <p>Checklist</p> <p>I confirm, attached to this application within the zipped file I have uploaded is:</p> <ul style="list-style-type: none"><input type="checkbox"/> A site plan clearly outlining our proposed/area and the boundaries<input type="checkbox"/> A build profile for the proposed area<input type="checkbox"/> A map outlining our preferred point of connection<input type="checkbox"/> A site phasing plan for the proposed area<input type="checkbox"/> The onsite mains design including pipe sizes and lengths<input type="checkbox"/> Any other accompanying documents relating to your application <p style="text-align: right;"></p>
---	--


7. Confirm what documents have been uploaded prior to submitting the application. Once done click



8. If all required fields have been completed, you will get confirmation that the 'Request for Eligibility check' has been submitted successfully.

Success✕

Submitted successfully.



9. Click



10. You will receive an email confirmation that the application has been submitted as well.


Subject: Reference No: 11274, Clean Water, Request for Eligibility Check

Dear customer,




Thank you for submitting your request for *name of service* to Thames Water. Please allow up to *SLA* working days for a response.

Should you need to contact us in the interim, please contact your account manager directly, or email our service desk at wholesalemarketservices@thameswater.co.uk stating the reference number 11274.


Regards
Wholesale Market Services

	NOTE – if you failed to complete a required field, the area will be highlighted as shown below. Once filled in, you will then be able to submit the request.
	<div><div>Site address: <i>required</i></div><div><input type="text"/></div><div>Please provide site address</div></div> <div><div>Postcode: <i>required</i></div><div><input type="text" value="AA1 1AA"/></div></div>


How to submit a request for eligibility check and budget estimate

	From the landing page
	<div><div>Welcome WMSTRG Log out</div><div> Home NAV Application NAV Organisation Management User Guide</div><div>Home > NAV Admin</div><div></div><div><div>Clean Water Application</div><div>Waste Water Application</div></div><div><div><div>234</div><div>Total Number of Open NAV forms (234)</div></div></div></div>





1. Click 'Clean Water Application'

	<p>What service would you like to request?</p> <p><i>Please use dropdown to select required</i></p> <div style="border: 1px solid #0070C0; padding: 2px; display: inline-block;"> Request For Eligibility check and Budget Estimate ▼ </div>
---	---

2. Select the 'Request for Eligibility check and Budget Estimate' from the dropdown options in the section entitled 'What service would you like to request? '. The form will create with the section applicable to this request.
3. Complete the form as described in the 'How to submit a request for an Eligibility Check' section above as well as completing 'Section D – Request For Budget Estimate'.

	<p>The request for budget estimate section</p> <div style="background-color: #0070C0; color: white; padding: 5px; border: 1px solid #0070C0;"> Section D - Request For Budget Estimate + </div> <p>IMPORTANT</p> <p>Further drop down fields will appear if you select 'Yes' to any of the answers in this section.</p> <p>You will not be able to submit an application if any required fields have not been completed.</p>
---	---

How to submit a request for eligibility check and formal quote

	<p>From the landing page</p> <div style="text-align: right; margin-top: 10px;">  Welcome WMSTRG Log out </div> <div style="margin-top: 20px;">  Home NAV Application NAV Organisation Management User Guide </div> <hr/> <p>Home > NAV Admin</p> <div style="margin-top: 20px;">  <div style="border: 1px solid #0070C0; height: 20px; background-color: #D9E1F2; margin-top: 5px;"></div> </div> <div style="margin-top: 20px;"> <div style="border: 2px solid red; padding: 5px; display: inline-block; margin-right: 10px;"> > Clean Water Application </div> <div style="border-bottom: 1px solid #0070C0; padding-bottom: 5px;"> > Waste Water Application </div> </div> <div style="margin-top: 30px; text-align: center;"> <div style="background-color: #FFD700; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center; font-size: 24px; font-weight: bold; color: white;"> 2345 </div> <p style="color: #0070C0; font-weight: bold; margin-top: 10px;">Total Number of Open NAV forms (234)</p> </div>
---	---

1. Click 'Clean Water Application' or the open application in the NAV application view if you have already received a budget estimate as per the email below:


Dear customer

This email is to notify you that you should have received all information as requested and that your application reference 11277 is now marked as complete. Should you have any questions or issues with this, please contact your account manager directly or email our service desk at wholesalemarketservices@thameswater.co.uk



Comments: Budget estimate emailed

Regards





Wholesale Market Services

	<p>What service would you like to request?</p> <p><i>Please use dropdown to select required</i></p> <div>Request For Eligibility check and Formal Quote ▼</div>
---	--

2. Select the 'Request for Eligibility check and Formal Quote' from the dropdown options in the section entitled 'What service would you like to request? '. The form will create with the section applicable to this request.
3. Complete the form as described in the 'How to submit a request for an Eligibility Check' section above as well as completing 'Section D – Request For Formal Quote'.

	<p>The request for a formal quote section</p> <div>Section D - Request For Formal Quote </div> <p>IMPORTANT</p> <p>Further drop down fields will appear if you select 'Yes' to any of the answers in this section.</p> <p>You will not be able to submit an application if any required fields have not been completed.</p>
---	---

How to submit Risk assessment information

	<p>NAV Application screen view</p> <p>NAV Application</p> <div><div>Site Name</div><div>Company Name</div><div>Stage</div><div>Status</div><div>Global search</div></div> <div>Please select ▼</div> <div>Please specify...</div> <table border="1"><thead><tr><th>Site Name</th><th>Contact Name</th><th>Company Name</th><th>Form Type</th><th>Stage</th><th>Status</th><th>Date of submission</th><th>Last updated date</th><th>TW ref number</th><th>View</th></tr></thead><tbody><tr><td>A Name 2</td><td>WMSTRG</td><td>NAV TEST</td><td>Clean Water Bulk Supply Agreement</td><td>Request For Eligibility check and Formal Quote</td><td>Complete</td><td>12/02/2019</td><td>12/02/2019</td><td>WMSN11277</td><td></td></tr></tbody></table>	Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View	A Name 2	WMSTRG	NAV TEST	Clean Water Bulk Supply Agreement	Request For Eligibility check and Formal Quote	Complete	12/02/2019	12/02/2019	WMSN11277	
Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View												
A Name 2	WMSTRG	NAV TEST	Clean Water Bulk Supply Agreement	Request For Eligibility check and Formal Quote	Complete	12/02/2019	12/02/2019	WMSN11277													

1. Click the 'site name' in the Site Name column (it will be green although the status will be 'Complete'). You have already received a formal quote as per the email below:


Dear customer

This email is to notify you that you should have received all information as requested and that your application reference 11277 is now marked as complete. Should you have any questions or issues with this, please contact your account manager directly or email our service desk at wholesalemarketservices@thameswater.co.uk

Comments: Formal quote emailed 12 Feb to WMSTRG

Regards

Wholesale Market Services



Clean Water Application screen view

What service would you like to request?
Please use dropdown to select
required

Request For Risk Assessment ▼

This form contains some pre populated information from previous applications, Please review all information carefully and ensure that all information is correct and up to date.

Section A - Contact details

Section B - Site details

Section C - Eligibility


Section D - Request For Risk Assessment

Section E - Request for Risk Assessment Information

Comments

Additional Comments:

- The 'What service would you like to request?' drop down list will default to 'Request for Risk Assessment' as this is a mandatory part of the process. Section D will change from 'Request for Formal Quote' to 'Request For Risk Assessment' and the data that you submitted for the quote is shown.



Clean Water Application – ‘Request for Risk Assessment Information’ screen view


Section E – Request for Risk Assessment Information


Please use the box opposite to indicate what information you require in order to submit a satisfactory risk assessment to the DWI, associated with submitting your application to Ofwat (e.g. drinking water safety plans).

We'll respond to your request within 15 business days and let you know if we need more information to fulfil your request


Comments


Additional Comments:

- Open ‘Section E – Request for Risk Assessment information’ and enter the information required or state ‘No information required’. Add any additional comments if relevant and click .
- You will get confirmation that the request has been submitted successfully.


Success


Submitted successfully.



- Click .
- You will receive an email confirmation that the application has been submitted as well.

How to submit a Bulk supply agreement request



NAV Application screen view

NAV Application

Site Name

Company Name


Stage

Status

Global search

Please select

Please specify...

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
A Name 2	WMSTRG	NAV TEST	Clean Water Bulk Supply Agreement	Request For Risk Assessment	Complete	12/02/2019	12/02/2019	WMSN11277	

1. Click the 'site name' in the Site Name column (it will be green although the status will be 'Complete'). You have already received confirmation that the Risk Assessment stage is complete as per the email below:


Dear customer

This email is to notify you that you should have received all information as requested and that your application reference 11277 is now marked as complete. Should you have any questions or issues with this, please contact your account manager directly or email our service desk at wholesalemarketservices@thameswater.co.uk

Comments: Risk assessment - acknowledged that no further information is required at this stage

Regards

Wholesale Market Services

**Clean Water Application screen view**

What service would you like to request?
Please use dropdown to select required

Request For Bulk Supply Agreement(BSA) ▼

This form contains some pre populated information from previous applications, Please review all information carefully and ensure that all information is correct and up to date.

Section A - Contact details

Section B - Site details

Section C - Eligibility

Section D - Request For Bulk Supply Agreement (BSA)

Section E - Request for Risk Assessment Information


Section F - Request for a Bulk Supply Agreement (BSA)


Comments

Additional Comments:

2. The 'What service would you like to request?' drop down list will default to 'Request for Bulk Supply Agreement (BSA)' as this is the next stage of the process. Section D will change from 'Request For Risk Assessment' to 'Request for Bulk Supply Agreement (BSA)' and the data that you submitted previously is shown.

3. This is the data that the bulk supply agreement will be compiled against, therefore, if any changes are required, please update accordingly and add any confirmation of what you have changed in the 'Additional Comments:' section.


**Clean Water Application – ‘Request for Bulk Supply Agreement (BSA)’ screen view**

Section F – Request for a Bulk Supply Agreement (BSA)


Company name (for reference in BSA)
required


Company registration number
required

Registered office
required


Comments


Additional Comments:

4. Open ‘Section F – Request for Bulk Supply Agreement (BSA)’ and enter the information required.
Add any additional comments if relevant and click .
5. You will get confirmation that the request has been submitted successfully.

Success

Submitted successfully.




6. Click .
7. You will receive an email confirmation that the application has been submitted as well.

Dear customer

Thank you for submitting your request for a Bulk Agreement to Thames Water. We aim to complete this request within 5 working days from the end of the Ofwat Consultation.

Should you need to contact us in the interim, please contact your account manager directly, or email our service desk at wholesalemarketservices@thameswater.co.uk stating the reference number 11277.

How to submit a connection request



NAV Application screen view

NAV Application

Site Name

Company Name


Stage

Status

Global search

Please select ▼

Please specify...

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
A Name 2	WMSTRG	NAV TEST	Clean Water Bulk Supply Agreement	Request For Bulk Supply Agreement (BSA)	Complete	12/02/2019	12/02/2019	WMSN11277	

1. Click the 'site name' in the Site Name column (it will be green although the status will be 'Complete'). You have already received the signed Bulk Supply Agreement as per the email below:

Dear customer

This email is to notify you that you should have received all information as requested and that your application reference 11277 is now marked as complete. Should you have any questions or issues with this, please contact your account manager directly or email our service desk at wholesalemarketservices@thameswater.co.uk

Comments: Signed by TW - copy sent to WMSTRG for their records

Regards

Wholesale Market Services



Clean Water Application screen view

What service would you like to request?

*Please use dropdown to select
required*

Request For Connection work

This form contains some pre populated information from previous applications, Please review all information carefully and ensure that all information is correct and up to date.

Section A - Contact details



Section B - Site details



Section C - Eligibility



Section D - Request For Connection Work



Section E - Request for Risk Assessment Information



Section G - Request for connection work



Section H - Account Information



Comments



Additional Comments:

- The 'What service would you like to request?' drop down list will default to 'Request For Connection Work' as this is the next mandatory part of the process. Section D will change from 'Request for Bulk Supply Agreement (BSA)' to 'Request For Connection Work' and the data that you submitted previously that the BSA is based is shown.



Clean Water Application – ‘Request for connection work’ screen view

Section G – Request for connection work



Please confirm your proposed date of connection:

required

Payment has been arranged with the following reference:

required

Health and safety

Please provide details of your principal designer.

Name:

required

Company:

required

Company address:

required

Postcode:

required

Email:

required

Please provide details of your principal contractor

Name:

required


Address:

required

Postcode:

required

3. Open ‘Section G – Request for connection work’ and enter the information required. Add any additional comments if relevant



Clean Water Application – ‘Account Information’ screen view

Section H – Account Information

We need this information so that we can create / update our systems with your details for billing and account management purposes.

Key account contact:

required

Telephone number:


required

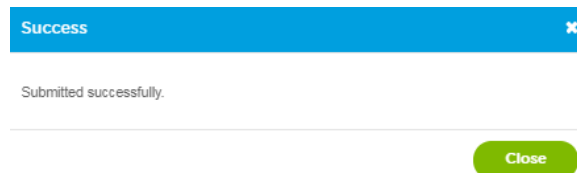
Email:


required

Billing address

required

- Open ‘Section H – Account Information’ and enter the information required. Add any additional comments if relevant.
- Click .
- You will get confirmation that the request has been submitted successfully.



- Click .
- You will receive an email confirmation that the application has been submitted as well.

Dear customer

Thank you for submitting your request for Connection work to Thames Water. Please allow up to 20 working days for a response.

Should you need to contact us in the interim, please contact your account manager directly, or email our service desk at wholesalemarketservices@thameswater.co.uk stating the reference number 11277.

Regards

Wholesale Market Services

Exercise 4: How to create a new wastewater application request

Business scenario

You are already logged into the WMS Portal and would like to submit a new application to Thames Water via the online Portal.

Learning outcome

By the end of this exercise you will be able to submit a new wastewater application request via the online Portal.

General awareness

Depending on the type of request you are making, the sections of the form that are required will alter accordingly. The different forms are as follows:

- An eligibility check on your proposed area
- An eligibility check on your proposed area at the same time as requesting network information
- A Bulk discharge agreement
- A connection


As you complete the online form, fields that you miss that are marked as required will be highlighted immediately as shown below. You will not be able to submit an application with any required fields not completed.

The screenshot shows a form with two fields. The first field is labeled 'Site address:' with a red 'required' tag below it. The input box is empty and has a red border. Below the input box, the text 'Please provide site address' is displayed in red. The second field is labeled 'Postcode:' with a blue 'required' tag below it. The input box contains the text 'AA1 1AA' and has a blue border.


Steps

- Where to find the wastewater application form
- How to submit a request for an eligibility check
- How to submit a request for eligibility check and network information
- How to submit a bulk discharge agreement request
- How to submit a connection request

Where to find the wastewater application form




From the landing page



Home NAV Application NAV Organisation Management User Guide

Welcome WMSTRG [Log out](#)

Home > NAV Admin




> Clean Water Application

> Waste Water Application

234

Total Number of Open NAV forms (234)

1. Click 'Waste Water Application'



The application form will be displayed.

Set up a waste water bulk supply discharge for new appointments and variations(NAVs)

Please use the guidance notes to help Bulk Agreement all sections on the form.

About the form

This form has been split into multiple sections. Which sections will display is dependent on the service that you are requesting, Throughout this form you will be able to request:

- An eligibility check on your proposed area
- An eligibility check on your proposed area at the same time as requesting network information
- A Bulk discharge Agreement
- A connection

You will not be able to skip vital stages in the application processes, meaning that you will not see all options. As you move through the application, the form will pre populate from the previous stage, please ensure ALL information is up to date and accurate. Should you have any questions relating to this form, please review the user guide or contact your account manager who will be able to assist.

What service would you like to request?

Please use dropdown to select
required

Request For Eligibility check

Section A - Contact details



Section B - Site details



Section C - Eligibility



Comments



Additional Comments:

Attachments

1

Choose File



Q Browse

Please zip all files you wish to upload to accompany your application.

You can upload one zip file at each stage of your application, therefore please ensure we have the most up to date documents at every stage.

Checklist

I confirm, attached to this application within the zipped file I have uploaded is:

- ☐ A site plan clearly outlining our proposed area and the boundaries
- ☐ A build profile for the proposed area
- ☐ A map outlining our preferred point of connection
- ☐ A site phasing plan for the proposed area
- ☐ The onsite mains design including pipe sizes and lengths
- ☐ Any other accompanying documents relating to your application

Submit




NOTE – once you select a particular service, the form will populate with the relevant sections that require completion

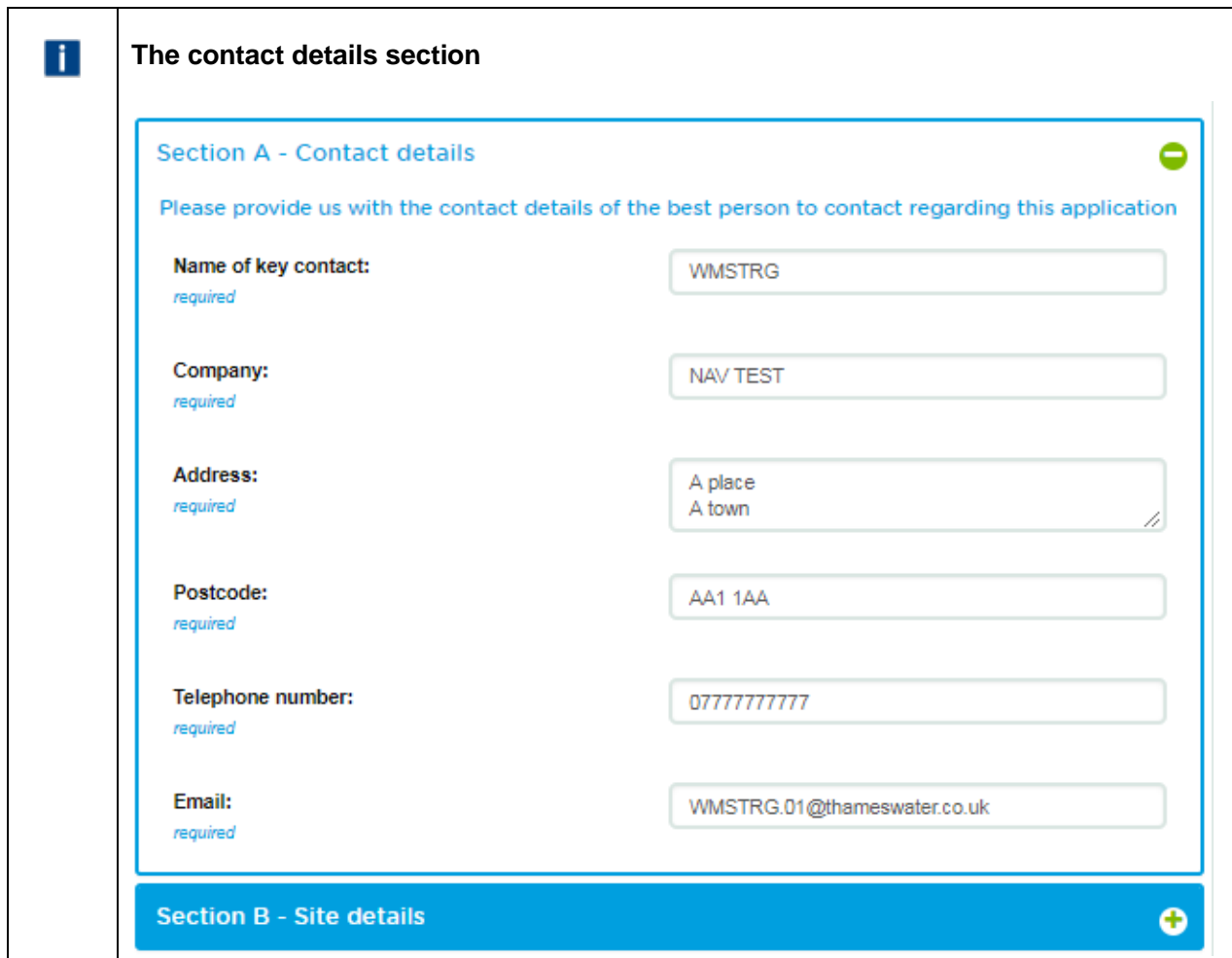
How to submit a request for an eligibility check

1. This is the initial default form when you select the 'Waste Water Application' option as shown above.



The screenshot shows a horizontal bar with a blue background. On the left is a white square containing a blue lowercase 'i' icon. To the right of this is the text 'Section A - Contact details' in white. On the far right is a white square containing a green plus icon.



2. Click the  on the 'Section A - Contact details' section – these should default to you details when your profile was created so may not require any input.



The screenshot shows a form titled 'The contact details section'. On the left is a vertical sidebar with a white background containing a blue lowercase 'i' icon. The main area has a white background. At the top is a blue bar with the text 'Section A - Contact details' in white and a green minus icon on the right. Below this is the instruction 'Please provide us with the contact details of the best person to contact regarding this application' in blue. The form contains six fields, each with a label, a 'required' status, and a text input box:

- Name of key contact:** required. Input: WMSTRG
- Company:** required. Input: NAV TEST
- Address:** required. Input: A place, A town
- Postcode:** required. Input: AA1 1AA
- Telephone number:** required. Input: 07777777777
- Email:** required. Input: WMSTRG.01@thameswater.co.uk

At the bottom is a blue bar with the text 'Section B - Site details' in white and a green plus icon on the right.

3. Update or amend as required though. Click  to close, or open the next section, 'Section B – Site details' by clicking on the  option.



The site details section

Section B - Site details



Please provide us with the location details of the proposed area of appointment. This includes third party land, Contamination, Traffic Management and Existing supplies.

Site Name:

required

Site address:

required

Postcode:

required

Grid reference:

required

Planning application number:

required

Will any bulk discharge connection(s) need to go through third party land to reach the NAV site?

required

☐ Yes ☐ No

Contamination and site issues

Are you aware of any contamination, conservation or archaeological issues relating to this site or its surrounding areas?

required

☐ Yes ☐ No

Traffic management

Are there any parking bays of any kind in the vicinity of the site?

required

☐ Yes ☐ No

Existing supplies

Are there any existing supplies at the site?

required

☐ Yes ☐ No

Section C - Eligibility





IMPORTANT

Further drop down fields will appear if you select Yes to any answers above.

You will not be able to submit an application if any required fields have not been completed.

4. Complete accordingly and as required. Click  to close, or open the next section, 'Section C - Eligibility' by clicking on the  option.

**The eligibility section**

Section C - Eligibility

Please indicate under which criterion you are intending to apply to Ofwat to become the new appointee for this site:
required

☐ Unserved – please go to subsection i) below
☐ Large user – please go to subsection ii) below
☐ Consent – please go to subsection iii) below

i) **Unserved criteria:**


Please include in your upload of documents, a site map which clearly outlines the boundaries of the site. If the site is not Greenfield, ensure you supply an explanation as to why you consider the 'Unserved' criterion applies and any evidence. This may include plans for demolition or capping of existing pipework



ii) **Large user:**


Please contact Wholesale Market Services with information including details of the customer who is considered to be a 'Large user', so that we can make arrangements for the accounts to be transitioned.


iii) **Consent:**

You will need to request consent from us for the area you are looking to serve. Please contact Wholesale Market Services with information including 'Supply requirements', 'Site Phasing' and 'Site Plans'.

Comments

5. Select the criteria you are applying to Ofwat under and then click  to close, or open the next section, 'Comments' by clicking on the  option.

**The comments and upload attachments section**

Comments


No comments given


Additional Comments:

Attachments

1


Choose File




 Browse

Please zip all files you wish to upload to accompany your application.
You can upload one zip file at each stage of your application, therefore please ensure we have the most up to date documents at every stage.

6. The comments view will show as 'no comments given' at this stage, however, you are able to add an additional comments in the 'Additional Comments' field. You can also add any attachments at this stage.

	<p>IMPORTANT</p> <p>Please zip all files you wish to upload to accompany your application.</p> <p>You can upload one zip file at each stage of your application, therefore, please ensure we have the most up to date documents at every stage.</p>
---	--

	<p>The checklist section</p> <p>Checklist</p> <p>I confirm, attached to this application within the zipped file I have uploaded is:</p> <ul style="list-style-type: none"><input type="checkbox"/> A site plan clearly outlining our proposed/area and the boundaries<input type="checkbox"/> A build profile for the proposed area<input type="checkbox"/> A map outlining our preferred point of connection<input type="checkbox"/> A site phasing plan for the proposed area<input type="checkbox"/> The onsite mains design including pipe sizes and lengths<input type="checkbox"/> Any other accompanying documents relating to your application <p style="text-align: right;">Submit</p>
---	---

7. Confirm what documents have been uploaded prior to submitting the application. Once done click [Submit](#).
8. If all required fields have been completed, you will get confirmation that the 'Request for Eligibility check' has been submitted successfully.

Success✕

Submitted successfully.

[Close](#)

9. Click [Close](#)
10. You will receive an email confirmation that the application has been submitted as well.

Subject: Reference No: 11289, Waste Water, Request for Eligibility Check


Dear customer

Thank you for submitting your request for an Eligibility check to Thames Water. Please allow up to 15 working days for a response.





Should you need to contact us in the interim, please contact your account manager directly, or email our service desk at wholesalemarketservices@thameswater.co.uk stating the reference number 11289.

Regards

Wholesale Market Services

	NOTE – if you failed to complete a required field, the area will be highlighted as shown below. Once filled in, you will then be able to submit the request.
	<div><div>Site address: <i>required</i></div><div><input type="text"/></div><div>Please provide site address</div></div> <div><div>Postcode: <i>required</i></div><div><input type="text" value="AA1 1AA"/></div></div>

How to submit a request for eligibility check and network information

	From the landing page
	<div><div>Welcome WMSTRG </div><div> Home NAV Application NAV Organisation Management User Guide</div><div>Home > NAV Admin</div><div></div><div><div><div>Clean Water Application</div><div>Waste Water Application</div></div><div><div>2345</div><div>Total Number of Open NAV forms (234)</div></div></div></div>

1. Click 'Waste Water Application'

i	<p>What service would you like to request?</p> <p><i>Please use dropdown to select required</i></p> <div style="border: 1px solid #0070C0; padding: 2px; display: inline-block;">Request for Eligibility Check & Network Informati ▼</div>
---	--

2. Select the 'Request for Eligibility check and Network Information' from the dropdown options in the section entitled 'What service would you like to request? '. The form will create with the section applicable to this request.
3. Complete the form as described in the 'How to submit a request for an Eligibility Check' section above as well as completing 'Section D – Request For Network Information'.

i	<p>The request for Network Information section</p> <div style="background-color: #0070C0; color: white; padding: 5px; border: 1px solid #0070C0;"> Section D – Request for Network Information + </div> <p>IMPORTANT</p> <p>Further drop down fields will appear if you select 'Yes' to any of the answers in this section.</p> <p>You will not be able to submit an application if any required fields have not been completed.</p>
---	--

How to submit a request for network information

i	<p>NAV Application screen view</p> <p>NAV Application</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> <div>Site Name <input type="text"/></div> <div>Company Name <input type="text"/></div> <div>Stage <input type="text"/></div> <div>Status <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Please select ▼</div></div> <div>Global search <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;">Please specify...</div></div> </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #0070C0; color: white;"> <th>Site Name</th> <th>Contact Name</th> <th>Company Name</th> <th>Form Type</th> <th>Stage</th> <th>Status</th> <th>Date of submission</th> <th>Last updated date</th> <th>TW ref number</th> <th>View</th> </tr> </thead> <tbody> <tr> <td style="color: green;">A Site</td> <td>WMSTRG</td> <td>NAV TEST</td> <td>Waste Water Bulk Discharge</td> <td>Request for Eligibility Check</td> <td>Complete</td> <td>12/02/2019</td> <td>12/02/2019</td> <td>WMSN11289</td> <td></td> </tr> </tbody> </table> </div>	Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View	A Site	WMSTRG	NAV TEST	Waste Water Bulk Discharge	Request for Eligibility Check	Complete	12/02/2019	12/02/2019	WMSN11289	
Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View												
A Site	WMSTRG	NAV TEST	Waste Water Bulk Discharge	Request for Eligibility Check	Complete	12/02/2019	12/02/2019	WMSN11289													

1. Click the 'site name' in the Site Name column (it will be green although the status will be 'Complete'). You have already received confirmation that the 'Request for Eligibility Check' stage is complete as per the email below:

Dear customer

This email is to notify you that you should have received all information as requested and that your application reference 11289 is now marked as complete. Should you have any questions or issues with this, please contact your account manager directly or email our service desk at wholesalemarketservices@thameswater.co.uk

Comments: Site verified as eligible

Regards
Wholesale Market Services



Wastewater Application screen view

What service would you like to request?

Please use dropdown to select
required

Request for Eligibility Check & Network Information ▼

This form contains some pre populated information from previous applications, Please review all information carefully and ensure that all information is correct and up to date.

Section A - Contact details



Section B - Site details



Section C - Eligibility



Section D - Request for Network Information



Comments



Additional Comments:

Attachments

1

Choose File




Q Browse

- The 'What service would you like to request?' drop down list will default to 'Request for Eligibility & Network Information' although the Eligibility check is already complete.



Wastewater Application – 'Request for Eligibility & Network Information' screen view

- Open 'Section D – Request for Eligibility & Network Information' and enter the information required. Add any additional comments if relevant and click  .
- You will get confirmation that the request has been submitted successfully.

Success



Submitted successfully.

Close

5. Click

Close

6. You will receive an email confirmation that the application has been submitted as well.

Dear customer


Thank you for submitting your request for Network Information to Thames Water. Please allow up to 20 working days for a response.

Should you need to contact us in the interim, please contact your account manager directly, or email our service desk at wholesalemarketservices@thameswater.co.uk stating the reference number 11289.

Regards

Wholesale Market Services

How to submit a Bulk discharge agreement request

**NAV Application screen view**

NAV Application

Site Name

Company Name


Stage

Status

Global search

Please select

Please specify...

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
A Site	WMSTRG	NAV TEST	Waste Water Bulk Discharge	Request for Eligibility Check & Network Information	Complete	12/02/2019	12/02/2019	WMSN11289	

1. Click the 'site name' in the Site Name column (it will be green although the status will be 'Complete'). You have already received confirmation that the 'Eligibility Check & Network Information' stage is complete as per the email below:

Dear customer

This email is to notify you that you should have received all information as requested and that your application reference 11289 is now marked as complete. Should you have any questions or issues with this, please contact your account manager directly or email our service desk at wholesalemarketservices@thameswater.co.uk

Comments: Network information emailed to WMSTRG 12.02.19

Regards

Wholesale Market Services



Wastewater Application screen view

What service would you like to request?
*Please use dropdown to select
required*

Request for Bulk Discharge Agreement ▼

This form contains some pre populated information from previous applications, Please review all information carefully and ensure that all information is correct and up to date.


- Section A - Contact details +
- Section B - Site details +
- Section C - Eligibility +
- Section D - Request for Network Information +
- Section E - Request for a Bulk Discharge Agreement (BDA) +
- Comments +

Additional Comments:

Attachments

1 Choose File Browse

- The 'What service would you like to request?' drop down list will default to 'Request for Bulk Discharge Agreement (BDA)' as this is the next stage of the process. Section D will show data that you submitted previously.
- This is the data that the bulk discharge agreement will be compiled against, therefore, if any changes are required, please update accordingly and add any confirmation of what you have changed in the 'Additional Comments:' section.


Wastewater Application – ‘Request for Bulk Discharge Agreement (BDA)’ screen view

Section E – Request for a Bulk Discharge Agreement (BDA)

Company name (for reference in BDA)
required


Company registration number
required


Registered office
required

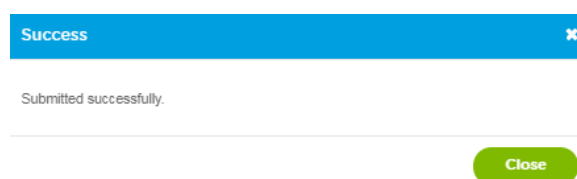
Comments


Additional Comments:

Attachments

1
Choose File

Browse

4. Open ‘Section E – Request for Bulk Discharge Agreement (BDA)’ and enter the information required. Add any additional comments if relevant and click .
5. You will get confirmation that the request has been submitted successfully.




6. Click .
7. You will receive an email confirmation that the application has been submitted as well.

Dear customer

Thank you for submitting your request for a Bulk Agreement to Thames Water. We aim to complete this request within 5 working days from the end of the Ofwat Consultation.

Should you need to contact us in the interim, please contact your account manager directly, or email our service desk at wholesalemarketservices@thameswater.co.uk stating the reference number 11289.

How to submit a connection request



NAV Application screen view

NAV Application

Site Name

Company Name


Stage

Status

Global search

Please select ▼

Please specify...

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
A Site	WMSTRG	NAV TEST	Waste Water Bulk Discharge	Request for Bulk Discharge Agreement	Complete	12/02/2019	12/02/2019	WMSN11289	

1. Click the 'site name' in the Site Name column (it will be green although the status will be 'Complete'). You have already received the signed Bulk Discharge Agreement as per the email below:

Dear customer

This email is to notify you that you should have received all information as requested and that your application reference 11289 is now marked as complete. Should you have any questions or issues with this, please contact your account manager directly or email our service desk at wholesaleservices@thameswater.co.uk

Comments: TW signed - copy sent back for your records

Regards

Wholesale Market Services



Wastewater Application screen view

What service would you like to request?

Please use dropdown to select

required

Request for Connection Work ▼

This form contains some pre populated information from previous applications, Please review all information carefully and ensure that all information is correct and up to date.

Section A - Contact details



Section B - Site details



Section C - Eligibility



Section D - Request for Network Information



Section E - Request for a Bulk Discharge Agreement (BDA)



Section F - Request for connection work



Section G - Account Information



Comments



Additional Comments:

2. The 'What service would you like to request?' drop down list will default to 'Request For Connection Work' as this is the next mandatory part of the process.



Wastewater Application – ‘Request for connection work’ screen view

Section F – Request for connection work



Please confirm your proposed date of connection:

required

Payment has been arranged with the following reference:

required

Please note that if a quotation has expired, we'll need to reissue the quotation. We'll contact you if this is the case and let you know how to proceed.

Health and safety

Please provide details of your principal designer.

Name:

required

Company:

required

Company address:

required

Postcode:

required

Email:

required

Please provide details of your principal contractor

Name:

required

Address:

required

Postcode:

required

Telephone number:

required

- Open ‘Section F – Request for connection work’ and enter the information required. Add any additional comments if relevant

i

Wastewater Application – ‘Account Information’ screen view

Section G – Account Information

–

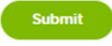
We need this information so that we can create / update our systems with your details for billing and account management purposes.

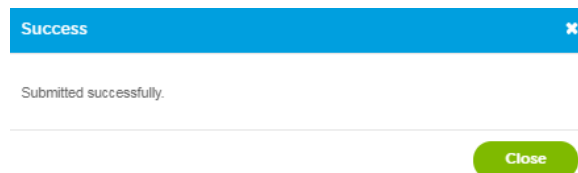
Key account contact:
required


Telephone number:
required

Email:
required

Billing address (if different to Section A):

4. Open ‘Section G – Account Information’ and enter the information required. Add any additional comments if relevant.
5. Click .
6. You will get confirmation that the request has been submitted successfully.



7. Click .
8. You will receive an email confirmation that the application has been submitted as well.

Dear customer

Thank you for submitting your request for Connection work to Thames Water. Please allow up to 20 working days for a response.

Should you need to contact us in the interim, please contact your account manager directly, or email our service desk at wholesalemarketservices@thameswater.co.uk stating the reference number 11289.

Regards

Wholesale Market Services

Exercise 5: NAV Application

Business scenario

You are already logged into the Portal, and want to track the progress or make an update to an existing application.

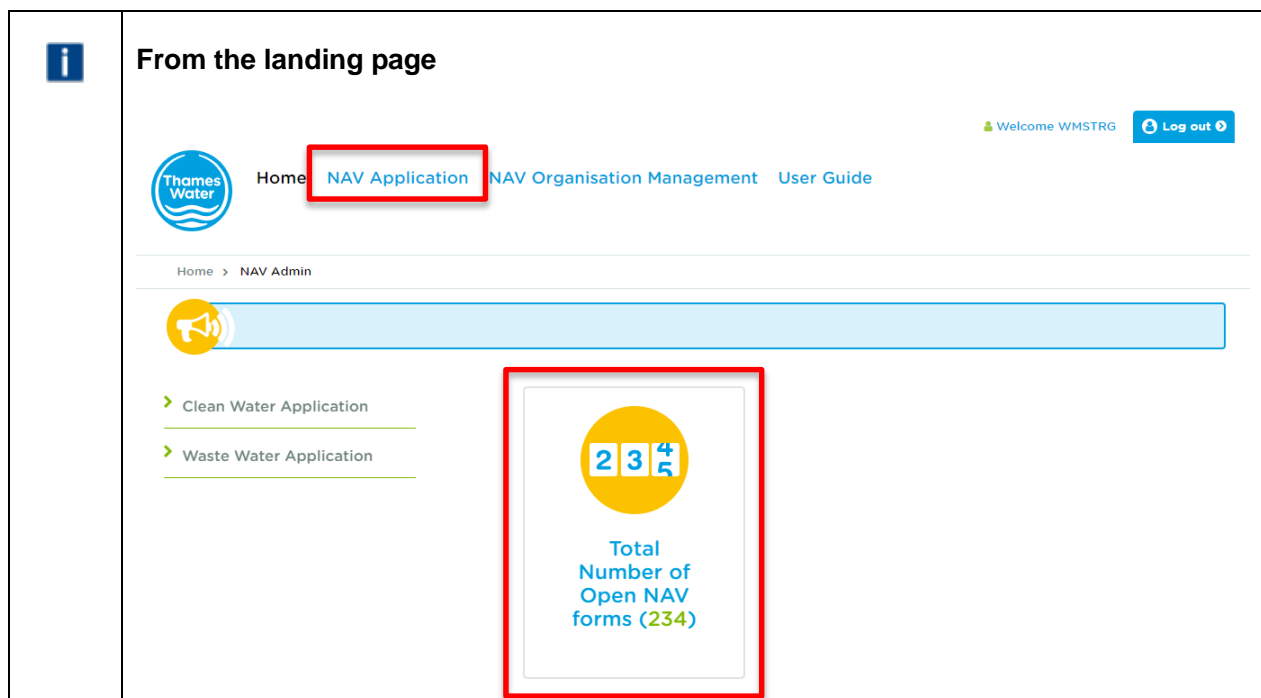
Learning outcome

By the end of this exercise you will be able to search for existing applications, check the status of an existing application and to make any updates in order to progress the application to the next stage, when notified by Thames Water.

Steps

- How to search for an existing application
- A request by Thames Water for further information
- How to view previously submitted information

How to search for an existing application



1. From the landing page select the 'NAV Application' heading or click on the Total Number of Open NAV forms icon.



NAV Application screen view

NAV Application

Site Name Company Name Stage Status Global search

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
Samantha and Chris Test	Samantha and Chris Test	Samantha and Chris Test	Clean Water Bulk Supply Agreement	Request For Eligibility check and Formal Quote	Request Received	11/02/2019	11/02/2019	WMSN11283	
Samantha and Chris Test	Samantha and Chris Test	Samantha and Chris Test	Clean Water Bulk Supply Agreement	Request For Eligibility check and Budget Estimate	Complete	11/02/2019	11/02/2019	WMSN11283	
Samantha and Chris Test	Samantha and Chris Test	Samantha and Chris Test	Clean Water Bulk Supply Agreement	Request For Eligibility check	Complete	11/02/2019	11/02/2019	WMSN11283	
654645654654	Mamatha	Test	Clean Water Bulk Supply Agreement	Request For Eligibility check	In Progress	11/02/2019	11/02/2019	WMSN11281	

2. The default view will show all requests that have submitted by the 'Last updated date' order, however, you can filter using any of the options available.



Note:

All filters displayed can be used to search for a service request.

You can also just type in part of the name.


- Site Name
- Company Name
- Stage
- Status
- Global Search


You can also use multiple filters at the same time.

The information available is:




- Site Name
- Contact Name
- Company Name
- Form Type
- Stage
- Status *
- Date of submission
- Last updated sate
- TW ref number
- View


	<p>* Status options available are:</p> <ul style="list-style-type: none"> • Request Received – Currently with TW but no action taken • In progress – TW reviewing the application • Further info required – TW seeking further information from the NAV • Passed to relevant department – Application passed to an internal TW department • Complete – This stage of the process has been completed
--	--

- Any stage that is complete and the 'Site Name' is in black, the only option available to you is to view the form that has been completed by clicking the  in the 'View' column (see A in screen shot below).
- If the 'Site Name' is in green (see B in the screen shot below), you can open the application. If the application is with Thames Water, then you will not be able to make any changes and the submit button is shaded.
- If the submit button is unshaded, the application is with you to progress either to the next stage or to provide further information (see C in the screen shot below). You will receive email notification from Thames Water when an application requires you to take action.




NAV Application

Samantha and Chris Test	Samantha and Chris Test	Samantha and Chris Test	Clean Water Bulk Supply Agreement	Request For Eligibility check and Formal Quote	Request Received	11/02/2019	11/02/2019	WMSN11283	
Samantha and Chris Test	Samantha and Chris Test	Samantha and Chris Test	Clean Water Bulk Supply Agreement	Request For Eligibility check and Budget Estimate	Complete	11/02/2019	11/02/2019	WMSN11283	
Samantha and Chris Test	Samantha and Chris Test	Samantha and Chris Test	Clean Water Bulk Supply Agreement	Request For Eligibility check	Complete	11/02/2019	11/02/2019	WMSN11283	



Shaded view as application not currently with the NAV to progress



Unshaded view as application can be progressed by the NAV

- The system will automatically create the new application status to progress, updating the initial part of the process to 'Complete'.

A request by Thames Water for further information



Example of an email to notify you that further information is required by Thames Water

Dear customer,

This email is to notify you that there has been an update to the status of your application reference 11274.

Further information is required to allow us to progress your application. Please see the comments section in the portal (copy shown below) for details.

Comments: Please can you confirm XYZ - thanks

Regards

Wholesale Market Services

1. You will receive email notification that further information is required.



Screen shot of NAV Application view

NAV Application

Site Name Company Name Stage Status Global search

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
Name	WMSTRG	NAV TEST	Clean Water Bulk Supply Agreement	Request For Eligibility check	Further info required	11/02/2019	11/02/2019	WMSN11274	

2. In the portal, click on the 'Site Name' to open the application.



Screen shot of the comments section – closed view

Comments



Additional Comments:

Screen shot of the comments section – opened view


Comments



Submitted on : Monday, 11 February 2019 12:34 PM
Application Variations : Request For Eligibility check
Work Notes : Please can you confirm XYZ - thanks

Additional Comments:

- View comments by clicking the  icon to open the comments field



Screen shot of the additional comments section


Additional Comments:


Hi - the information you require is ABC - thanks

Attachments

1

Choose File



 Browse

*Please zip all files you wish to upload to accompany your application.
You can upload one zip file at each stage of your application, therefore please ensure we have the most up to date documents at every stage.*

Checklist

I confirm, attached to this application within the zipped file I have uploaded is:

- ☐ A site plan clearly outlining our proposed/area and the boundaries
- ☐ A build profile for the proposed area
- ☐ A map outlining our preferred point of connection
- ☐ A site phasing plan for the proposed area
- ☐ The onsite mains design including pipe sizes and lengths
- ☐ Any other accompanying documents relating to your application

Submit


4. Insert your comments / responses in the additional comments field and then click submit. You will receive the following confirmation message, click close.

Success

Submitted successfully.

Close

How to view previously submitted information



Screen shot of NAV Application view

NAV Application

Site Name

Company Name


Stage

Status


Global search

Please select

Please specify...

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
Name	WMSTRG	NAV TEST	Clean Water Bulk Supply Agreement	Request For Eligibility check	Further info required	11/02/2019	11/02/2019	WMSN11274	

1. Click the  icon in the View column



The information will be displayed in a new tab.

Set up a clean water bulk supply arrangements for new appointments and variations(NAVs)

Reference No:

WMSN11274

What service would you like to request?

Request For Eligibility check

Section A - Contact details

Please provide us with the contact details of the best person to contact regarding this application

Name of key contact:

WMSTRG

Company:

NAV TEST

Address:

A place A town

Postcode:

AA1 1AA

Telephone number:

07777777777

Email:

WMSTRG.01@thameswater.co.uk

Section B - Site details

Please provide us with the location details of the proposed area of appointment. This includes third party land, Contamination, Traffic Management and Existing supplies.


Site Name:

Name

Site address:

Address

How to view Additional Comments



Screen shot of NAV Application view

NAV Application

Site Name

Company Name


Stage

Status


Global search

Please select

Please specify...

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
Name	WMSTRG	NAV TEST	Clean Water Bulk Supply Agreement	Request For Eligibility check	Further info required	11/02/2019	11/02/2019	WMSN11274	

1. Click the  icon in the View column



The information will be displayed in a new tab.

Work Notes :

Submitted on :

Tuesday, 12 February 2019 12:36 PM

Application Variations :

Request For Bulk Supply Agreement (BSA)

Work Notes:

BSA emailed for signature

Submitted on :

Tuesday, 12 February 2019 11:26 AM

Application Variations :

Request For Risk Assessment

Work Notes:

Risk assessment - acknowledged that no further information is required at this stage

Submitted on :

Tuesday, 12 February 2019 10:58 AM

Application Variations :

Request For Eligibility check and Formal Quote

Work Notes:

Formal quote emailed 12 Feb to WMSTRG

Submitted on :

Tuesday, 12 February 2019 10:51 AM

Application Variations :

Request For Eligibility check and Budget Estimate

Work Notes:

Budget estimate emailed

Additional Comments

Comment :


BSA signed and returned

Attached file:

No attached file

Note – Comments that Thames Water add, show as work notes, comments added by the NAV, will show as Additional Comments. Any files attached will also be reflected here.

How to view attachments previously submitted



Screen shot of NAV Application view

NAV Application

Site Name

Company Name


Stage


Status


Global search

Please select

Please specify...

Site Name	Contact Name	Company Name	Form Type	Stage	Status	Date of submission	Last updated date	TW ref number	View
Name	WMSTRG	NAV TEST	Clean Water Bulk Supply Agreement	Request For Eligibility check	Further info required	11/02/2019	11/02/2019	WMSN11274	

2. Click the  icon in the View column and then click the url shown – see below



The information will be displayed in a new tab.

Work notes

Submitted on :

Tuesday, 12 February 2019 04:40 PM

Application Variations :

Request for Bulk Discharge Agreement

Comment :

TW signed - copy sent back for your records

Submitted on :

Tuesday, 12 February 2019 04:34 PM

Application Variations :

Request for Bulk Discharge Agreement

Comment :

BDA sent for signature

Submitted on :

Tuesday, 12 February 2019 04:09 PM

Application Variations :

Request for Eligibility Check & Network Information

Comment :

Network information emailed to WMSTRG 12.02.19

Submitted on :

Tuesday, 12 February 2019 03:40 PM

Application Variations :

Request for Eligibility Check

Comment :

Site verified as eligible

Additional Comments

No comments

Attached file:

[Setting%20up%20a%20water%20bulk%20supply%20for%20NAVs%20form13022019112031918.pdf](#)

Exercise 6 User management

Business scenario


You are already logged into the Portal, and as an Administrator you would like to create a new user or update/delete an existing user from your company.


Learning outcome


By the end of this exercise you will be able to create a new user and to update or delete an existing user in the Portal.

Steps


How to create a new user


**The landing page will be displayed.**


[Home](#) [NAV Application](#) [NAV Organisation Management](#) [User Guide](#)

 Welcome WMSTRG [Log out](#)

[Home](#) > [NAV Admin](#)


[Clean Water Application](#)

[Waste Water Application](#)



Total
Number of
Open NAV
forms (234)

1. Click [NAV Organisation Management](#)



The Create User screen will be displayed.

Home > NAV Admin

Create User
View/Update User

Create User

Name:
required


Email:
required

User Name:
required

Contact Number:
required


Create User


- Type in the **first name** and **surname** of the new user required in the 'Name' field e.g. **Joseph Bloggs**
- Type in the first part of the user's email address in the 'Email' field e.g. **Joseph.Bloggs**



Note:

You do not need to enter your company name; this will be automatically populated for you.

- Type in the user name in the 'User Name' field e.g. Joseph.Bloggs@TWUTIL.NET. Note – this field is only required if you have been given a user name when your company was created on the portal.
- Type the telephone number of the user in the 'Contact Number' field e.g. 07777 777777
- Click 




The following message will be displayed:

Message

NAV Internal User created successfully!

Close

- Click 




Possible error messages if information already found on the system

Error

A user with this email address already exists. Please try with another email address

Close

How to search for an existing user



From the NAV Organisation Management screen

Home > NAV Admin

Create User

View/Update User

Create User


Email: @thameswater.co.uk

User Name:

Contact Number:





Create User

- View/Update User
1. Click . All users will be listed.



The View/Update User screen will be displayed.

View/Update User


Name	Email	Contact Number	Actions
WMSTRG02	WMSTRG.02@thameswater.co.uk	07747777777	 
WMSTRG03	WMSTRG.03@thameswater.co.uk	07747647942	 

Showing 1 to 2 of 2 entries

Previous 1 Next

How to update an existing user

1. Click on edit icon  in the Actions column

 **Edit view**

View/Update User

Name: required

Email: required

User Name: required


Contact Number: required

[Save Changes](#)

2. Update Name or Contact Number as these are the only two editable fields. If the email or user name is incorrect then you will need to delete the record and set the profile up again.

[Save Changes](#)


3. Click [Save Changes](#) . You will see a message confirming the update.

Message 

NAV Internal User updated successfully!

[Close](#)

How to delete a user



From the NAV Organisation Management screen

Home > NAV Admin

> Create User

> View/Update User

Create User

Name:
required


Email:
required

User Name:
required

Contact Number:
required





Create User

4. Click [View/Update User](#) . All users will be listed.



The View/Update User screen will be displayed.



View/Update User



Name	Email	Contact Number	Actions
WMSTRG02	WMSTRG.02@thameswater.co.uk	07747777777	 
WMSTRG03	WMSTRG.03@thameswater.co.uk	07747647942	 



Showing 1 to 2 of 2 entries

Previous **1** Next

2. Click on delete icon  in the Actions column

	Delete confirmation
	<div><div>Message </div><p>Are you sure that you want to delete this NAV Internal User?</p><div><div>Yes</div><div>No</div></div></div>

3. Select  if you are sure or  to cancel the request.

	Deleted user confirmation
	<div><div>Success </div><p>User deleted successfully</p><div><div>Ok</div></div></div>

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