Data Standards Body

Technical Working Group

Decision Proposal 197 - Candidate Account End Points

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Context

This proposal describes the payloads for the candidate end points for Account Data cluster included in the energy sector designation instrument. This proposal includes feedback obtained in response to the following consultation activities:

- **Decision Proposal 114 - Account Payloads**
  This consultation proposed the payloads for Energy Account data. Feedback provided in response to this consultation can be found at:
  https://github.com/ConsumerDataStandardsAustralia/standards/issues/114
- **Decision Proposal 115 - Tailored Tariff Data Payloads**
  This consultation proposed the payloads for Tailored Tariff data. Feedback provided in response to this consultation can be found at:
  https://github.com/ConsumerDataStandardsAustralia/standards/issues/115
- **Decision Proposal 149 - Energy Draft Feedback Cycle 1**
  This consultation thread raised and allowed for holistic feedback to be provided on the draft energy standards as a whole. Feedback provided in response to this consultation can be found at:
  https://github.com/ConsumerDataStandardsAustralia/standards/issues/149
- **Decision Proposal 173 - Energy Draft Feedback Cycle 2**
  This consultation thread raised and allowed for second round of holistic feedback to be provided on the draft energy standards as a whole. Feedback provided in response to this consultation can be found at:
  https://github.com/ConsumerDataStandardsAustralia/standards/issues/173
- **Decision Proposal 180 - Energy Draft Feedback Cycle 3**
  This consultation thread raised and allowed for third round of holistic feedback to be provided on the draft energy standards as a whole. Feedback provided in response to this consultation can be found at:
  https://github.com/ConsumerDataStandardsAustralia/standards/issues/173
  Note: This consultation is still active

Decision To Be Made

Define the candidate end point URIs and payloads for Account Data in the energy sector.

Identified Options

When consulting on payloads each field potentially has multiple options. For this reason, this proposal only presents a single option for consultation with the expectation that all parts of the proposal are subject to change in response to community feedback.

This section therefore includes a series of descriptions of the underlying assumptions and rationale that have led to the specific proposal included in the recommendation section.

Tailored Tariff Payload

The tailored tariff payload has been included in this consultation to present a complete detailed account dataset. It has been updated to align with the payload of generic tariff consultation (DP 190) that is currently live for feedback.

Current Recommendation

The recommended URIs and Payloads for electricity account data are presented in the following sections.

Account End Points Summary

A summary of the account end points:

- GET /energy/accounts
- GET /energy/accounts/{accountId}
- GET /energy/accounts/{accountId}/payment-schedule
- GET /energy/accounts/{accountId}/concessions

Summary of changes

Endpoints/Payload	Field/Section	Change Type	Comments
• Account List • Detailed Account Data	entity relationship	Modified	To accommodate C&I customers the relationship between account, service points and plans has been modified to allow for a wider variety of plan structures
	nickName	Added	New field to capture customer identification of a plan if the Retailer supports it
	name	Modified	Renamed to “displayName”
	openDate	Modified	Renamed to “creationDate”
	planId	Removed	
	planOverview:name	Modified	Renamed to “displayName”
• Detailed Account Data	entity relationship	Modified	To accommodate C&I customers the relationship between account, service points and plans has been modified to allow for a wider variety of plan structures
	nickName	Added	New field to capture customer identification of a plan if the Retailer supports it
		Added	Added Tailored Tariff Payload
• Agreed Payment Schedule Data	amount	Added	Optional attribute to capture constant payment amount
	cardScheme	Modified	Added following new ENUM value: • UNKNOWN
	isTokenised	Added	Flag to capture if account details are tokenised and cannot be shared
	bsb	Modified	Made optional

Endpoints/Payload	Field/Section	Change Type	Comments
	accountNumber	Modified	Made optional
• Concession & Hardship Data	name	Modified	Renamed to “displayName”
	endDate	Added	
	perDayDiscount	Modified	Renamed to “dailyDiscount”
	perMonthDiscount	Modified	Renamed to “monthlyDiscount”
	annualDiscount	Modified	Renamed to “yearlyDiscount”
	percentageDiscount	Modified	Updated description to reflect change in discount duration attribute names

Account List

High Level Information

Title	Obtain the list of energy accounts available under the authorised consent
HTTP Method	GET
URI	/energy/accounts
Security Scope	energy:accounts.basic:read
Pagination	Not Supported
Path Parameters	None
Query Parameters	None

Request Payload

Not applicable

Response Payloads

HTTP Response Code: 200 OK

Field	Type	Mandatory	Description
data	Object	Mandatory	
{			
accountId	String	Mandatory	The ID of the account. To be created in accordance with CDR ID permanence requirements
accountNumber	String	Optional	Optional identifier of the account as defined by the data holder. This must be the value presented on physical statements (if it exists) and must not be used for the value of accountId
displayName	String	Optional	An optional display name for the account if one exists or can be derived. The content of this field is at the discretion of the data holder
creationDate	DateString	Mandatory	The date that the account was created or opened
plans	Array of Objects	Mandatory	The array of plans containing service points and associated plan details
[{			
nickName	String	Optional	Optional display name for the plan provided by the customer to help differentiate multiple plans

Field	Type	Mandatory	Description
servicePointIds	Array of Strings	Mandatory	An array of servicePointIds, representing NMIs, that this plan is linked to. If there are no service points allocated to this plan then an empty array would be expected
planOverview	Object	Mandatory	
{			
displayName	String	Optional	The name of the plan if one exists
startDate	DateString	Mandatory	The start date of the applicability of this plan
endDate	DateString	Optional	The end date of the applicability of this plan
}			
}]			
}			
links	Object	Mandatory	
{			
self	URIString	Mandatory	Fully qualified link to this API call
}			
meta	Object	Mandatory	
{			
}			

Detailed Account Data

High Level Information

Title	Obtain detailed information for a specific energy account
HTTP Method	GET
URI	/energy/accounts/{accountId}
Security Scope	energy:accounts.detail:read
Pagination	Not Supported
Path Parameters	**accountId** ID of a specific account to obtain data for. This is a tokenised ID previous obtained from the Account List end point.
Query Parameters	None

Request Payload

Not applicable

Response Payloads

HTTP Response Code: 200 OK

Field	Type	Mandatory	Description
data	Object	Mandatory	
{			
accountId	String	Mandatory	The ID of the account. To be created in accordance with CDR ID permanence requirements
accountNumber	String	Optional	Optional identifier of the account as defined by the data holder. This must be the value presented on physical statements (if it exists) and must not be used for the value of accountId
displayName	String	Optional	An optional display name for the account if one exists or can be derived. The content of this field is at the discretion of the data holder
creationDate	DateString	Mandatory	The date that the account was created or opened
plans	Array of Objects	Mandatory	The array of plans containing service points and associated plan details
[{			
nickName	String	Optional	Optional display name for the plan provided by the customer to help differentiate multiple plans

Field	Type	Mandatory	Description
servicePointIds	Array of Strings	Mandatory	An array of servicePointIds, representing NMIs, that this account is linked to
planOverview	Object	Mandatory	
{			
displayName	String	Optional	The name of the plan if one exists
startDate	DateString	Mandatory	The start date of the applicability of this plan
endDate	DateString	Optional	The end date of the applicability of this plan
}			
planDetail	Object	Mandatory	
{			
fuelType	Enum	Mandatory	The fuel types covered by the plan. Must be one of: • ELECTRICITY • GAS DUAL
isContingentPlan	Boolean	Optional	Flag that indicates that the plan is contingent on the customer taking up an alternate fuel plan from the same retailer (for instance, if the fuelType is ELECTRICITY then a GAS plan from the same retailer must be taken up). Has no meaning if the plan has a fuelType of DUAL. If absent the value is assumed to be false.
meteringCharges	Array of Objects	Optional	Charges for metering included in the plan
[{			
displayName	String	Mandatory	Display name of the charge
description	String	Optional	Description of the charge
minimumValue	AmountString	Mandatory	Minimum value of the charge if the charge is a range or the absolute value of the charge if no range is specified
maximumValue	AmountString	Optional	The upper limit of the charge if the charge could occur in a range
period	ExternalRef	Optional	The charges that occur on a schedule indicates the frequency. Formatted according to ISO 8601 Durations (excludes recurrence syntax)
}]			

Field	Type	Mandatory	Description
gasContract	Object Note that the structure of this object is identical to: *electricityContract*	Conditional	The details of the terms for the supply of electricity under this plan. Is mandatory if fuelType is set to GAS or DUAL
electricityContract	Object	Conditional	The details of the terms for the supply of electricity under this plan. Is mandatory if fuelType is set to ELECTRICITY or DUAL
{			
additionalFeeInformation	String	Optional	Free text field containing additional information of the fees for this contract
pricingModel	Enum	Mandatory	The pricing model for the contract. Must be one of: • SINGLE_RATE • SINGLE_RATE_CONT_LOAD • TIME_OF_USE • TIME_OF_USE_CONT_LOAD • FLEXIBLE • FLEXIBLE_CONT_LOAD • QUOTA Contracts for gas must use SINGLE_RATE
timeZone	Enum	Conditional	Required if pricingModel is set to TIME_OF_USE. Defines the time zone to use for calculation of the time of use thresholds. Must be one of: • LOCAL AEST
isFixed	Boolean	Mandatory	Flag indicating whether prices are fixed or variable
controlledLoad	Object	Conditional	Required if pricing model is SINGLE_RATE_CONT_LOAD or TIME_OF_USE_CONT_LOAD
{			
displayName	String	Mandatory	A display name for the controlled load tier
description	String	Optional	A description of the controlled load tier
dailyCharge	AmountString	Mandatory	The daily supply charge (exclusive of GST) for this controlled load tier
period	ExternalRef	Mandatory	The period for which the controlled load rate applies. Formatted according to ISO 8601 Durations (excludes recurrence syntax)
rates	Array Of Objects	Mandatory	Array of controlled load rates in order of usage volume

Field	Type	Mandatory	Description
[{			
unitPrice	AmountString	Mandatory	Unit price of usage per kWh (exclusive of GST)
volume	Number	Optional	Volume in kWh that this rate applies to. Only applicable for 'stepped' rates where different rates apply for different volumes of usage in a period
}]			
}			
discount	Array Of Objects	Optional	Optional list of discounts available for the contract. Should not include discounts arising from concessions or assistance. These should be included in the separate concessions end point.
[{			
displayName	String	Mandatory	The display name of the discount
description	String	Optional	The description of the discount
type	Enum	Mandatory	The type of the discount. Must be one of: • CONDITIONAL • GUARANTEED OTHER
category	Enum	Conditional	The type of the discount. Mandatory if the discount type is CONDITIONAL. Must be one of: • PAY_ON_TIME • DIRECT_DEBIT GUARANTEED_DISCOUNT
methodUType	Enum	Mandatory	The method of calculation of the discount. Must be one of: • percentOfBill • percentOfUse • fixedAmount percentOverThreshold
percentOfBill	Object	Conditional	Required if methodUType is percentOfBill
{			
rate	RateString	Mandatory	The rate of the discount applied to the bill amount (some types of charges may be excluded from this discount based on plan terms)
}			
percentOfUse	Object	Conditional	Required if methodUType is percentOfUse
{			

Field	Type	Mandatory	Description
rate	RateString	Mandatory	The rate of the discount applied to the usageamount
}			
fixedAmount	Object	Conditional	Required if methodUType is fixedAmount
{			
amount	AmountString	Mandatory	The amount of the discount
}			
percentOverThreshold	Object	Conditional	Required if methodUType is percentOverThreshold
{			
rate	RateString	Mandatory	The rate of the discount over the usage amount
usageAmount	AmountString	Mandatory	The usage amount threshold above which the discount applies
}			
}]			
intrinsicGreenPower	Object	Optional	Describes intrinsic green power for the plan. If present then the plan includes a percentage of green power in the base plan
{			
greenPercentage	RateString	Mandatory	Percentage of green power intrinsically included in the plan
}			
greenPowerCharges	Array Of Objects	Optional	Optional list of charges applicable to green power
[{			
displayName	String	Mandatory	The display name of the charge
description	String	Optional	The description of the charge
type	Enum	Mandatory	The type of charge. Must be one of: • FIXED_PER_DAY • FIXED_PER_WEEK • FIXED_PER_MONTH • FIXED_PER_UNIT • PERCENT_OF_USE PERCENT_OF_BILL

Field	Type	Mandatory	Description
tiers	Array Of Object	Mandatory	Array of charge tiers based on the percentage of green power used for the period implied by the type. Array is in order of increasing percentage of green power
{			
percentGreen	RateString	Mandatory	The upper percentage of green power used applicable for this tier
rate	RateString	Conditional	The rate of the charge if the type implies the application of a rate
amount	AmountString	Conditional	The amount of the charge if the type implies the application of a fixed amount
}			
}]			
fee	Array Of Objects	Optional	An array of fees applicable to the plan
[{			
type	Enum	Mandatory	The type of the fee. Must be one of: • EXIT • ESTABLISHMENT • LATE_PAYMENT • DISCONNECTION • DISCONNECT_MOVE_OUT • DISCONNECT_NON_PAY • RECONNECTION • CONNECTION • PAYMENT_PROCESSING • CC_PROCESSING • CHEQUE_DISHONOUR • DD_DISHONOUR • MEMBERSHIP • CONTRIBUTION • PAPER_BILL OTHER

Field	Type	Mandatory	Description
term	Enum	Mandatory	The term of the fee. Must be one of: • FIXED • 1_YEAR • 2_YEAR • 3_YEAR • 4_YEAR • 5_YEAR • PERCENT_OF_BILL • ANNUAL • DAILY • WEEKLY • MONTHLY BIANNUAL
amount	AmountString	Conditional	The fee amount. Required if term is not PERCENT_OF_BILL
rate	RateString	Conditional	The fee rate. Required if term is PERCENT_OF_BILL
description	String	Optional	A description of the fee
}]			
solarFeedInTariff	Array Of Objects	Optional	Array of feed in tariffs for solar power
[{			
type	Enum	Mandatory	The type of the tariff. Must be one of: • GOVERNMENT RETAILER
amount	AmountString	Conditional	The tariff amount per kWh
description	String	Optional	A description of the tariff
}]			
tariffPeriod	Array Of Objects	Mandatory	Array of tariff periods
[{			
displayName	String	Mandatory	The name of the tariff period
startDate	String	Conditional	The start date of the tariff period in a calendar year. Required if there is more than one period. Formatted in mm-dd format
endDate	String	Conditional	The end date of the tariff period in a calendar year. Required if there is more than one period. Formatted in mm-dd format
dailySupplyCharges	AmountString	Mandatory	The amount of access charge for the tariff period, in cents per day exclusive of GST.

Field	Type	Mandatory	Description
rateBlockUType	Enum	Mandatory	Specifies the type of rate applicable to this tariff period. Must be one of: • singleRate • timeOfUseRates demandCharges
singleRate	Object	Conditional	Object representing a single rate. Required if rateBlockUType is singleRate
{			
displayName	String	Mandatory	Display name of the rate
description	String	Optional	Description of the rate
generalUnitPrice	AmountString	Conditional	The block rate (unit price) for any usage above the included fixed usage, in cents per kWh inclusive of GST. Only required if pricingModel field is 'QUOTA'
period	ExternalRef	Optional	Usage period for which the block rate applies. Formatted according to ISO 8601 Durations (excludes recurrence syntax)
rates	Array Of Objects	Mandatory	Array of controlled load rates in order of usage volume
[{			
unitPrice	AmountString	Mandatory	Unit price of usage per kWh (exclusive of GST)
volume	Number	Optional	Volume in kWh that this rate applies to. Only applicable for 'stepped' rates where different rates apply for different volumes of usage in a period
}]			
}			
timeOfUseRates	Array Of Objects	Conditional	Array of objects representing time of use rates. Required if rateBlockUType is timeOfUseRates
[{			
displayName	String	Mandatory	Display name of the rate
description	String	Optional	Description of the rate
type	Enum	Mandatory	The type of usage that the rate applies to. Must be one of: • PEAK • OFF_PEAK • OFF_PEAK_DC • SHOULDER • SHOULDER1 SHOULDER2

Field	Type	Mandatory	Description
rates	Array Of Objects	Mandatory	Array of controlled load rates in order of usage volume
[{			
unitPrice	AmountString	Mandatory	Unit price of usage per kWh (exclusive of GST)
volume	Number	Optional	Volume in kWh that this rate applies to. Only applicable for 'stepped' rates where different rates apply for different volumes of usage in a period
}]			
timeOfUse	Array Of Objects	Mandatory	Array of times of use
[{			
days	Array Of Enum	Mandatory	The days that the rate applies to. Note that BUSINESS_DAYS means work days excluding public holidays. Must be one of: • SUNDAY • MONDAY • TUESDAY • WEDNESDAY • THURSDAY • FRIDAY • SATURDAY BUSINESS_DAYS
startTime	String	Mandatory	Start of the period in HHMM format using 24 hour clock format
endTime	String	Mandatory	End of the period in HHMM format using 24 hour clock format
}]			
}			
demandCharges	Array Of Objects	Optional	Array of demand charges
[{			
displayName	String	Mandatory	Display name of the charge
description	String	Optional	Description of the charge
amount	AmountString	Conditional	The charge amount per kWh exclusive of GST
startTime	String	Mandatory	Start of the period in HHMM format using 24 hour clock format
endTime	String	Mandatory	End of the period in HHMM format using 24 hour clock format

Field	Type	Mandatory	Description
days	Object	Optional	Optional object containing demand tariff by day of week
{			
weekdays	Boolean	Mandatory	Indicates the demand tariff is applicable on weekdays
saturday	Boolean	Mandatory	Indicates the demand tariff is applicable on Saturdays
sunday	Boolean	Mandatory	Indicates the demand tariff is applicable on Sundays
}			
minDemand	AmounString	Optional	Minimum demand for this demand tariff. If absent then 0 is assumed.
maxDemand	AmounString	Optional	Maximum demand for this demand tariff. If present, must be higher than the value of the minDemand field
measurementPeriod	Enum	Optional	Application period for the demand tariff. Must be one of: • DAY • MONTH SEASON
chargePeriod	Enum	Optional	Change period for the demand tariff. Must be one of: • DAY • MONTH SEASON
}]			
}]			
}			
}]			
}			
authorisedContacts	Array of Objects	Mandatory	An array of additional contacts that are authorised to act on this account
[{			
firstName	String	Optional	For people with single names this field need not be present. The single name should be in the lastName field

Field	Type	Mandatory	Description
lastName	String	Mandatory	For people with single names the single name should be in this field
middleNames	Array of Strings	Mandatory	Field is mandatory but array may be empty
prefix	String	Optional	Also known as title or salutation. The prefix to the name (e.g. Mr, Mrs, Ms, Miss, Sir, etc)
suffix	String	Optional	Used for a trailing suffix to the name (e.g. Jr)
}]			
}			
links	Object	Mandatory	
{			
self	URIString	Mandatory	Fully qualified link to this API call
}			
meta	Object	Mandatory	
{			
}			

Agreed Payment Schedule Data

High Level Information

Title	Obtain the agreed payment schedule and details, if any, for a specific energy account
HTTP Method	GET
URI	/energy/accounts/{accountId}/payment-schedule
Security Scope	energy:accounts.paymentschedule:read
Pagination	Not Supported
Path Parameters	**accountId** ID of a specific account to obtain data for. This is a tokenised ID previous obtained from the Account List end point.
Query Parameters	None

Request Payload

Not applicable

Response Payloads

HTTP Response Code: 200 OK

Field	Type	Mandatory	Description
data	Object	Mandatory	
{			
amount	String	Optional	Optional payment amount indicating that a constant payment amount is scheduled to be paid (used in bill smooting scenarios)
paymentScheduleUType	Enum	Mandatory	The type of object present in this response. May be one of: • cardDebit • directDebit • manualPayment
cardDebit	Object	Conditional	Represents a regular credit card payment schedule. Mandatory if paymentScheduleUType is set to cardDebit
{			

Field	Type	Mandatory	Description
cardScheme	Enum	Mandatory	The type of credit card held on file: • VISA • MASTERCARD • AMEX • DINERS • OTHER • UNKNOWN
paymentFrequency	ExternalRef	Mandatory	The frequency that payments will occur. Formatted according to ISO 8601 Durations (excludes recurrence syntax)
calculationType	Enum	Mandatory	The mechanism by which the payment amount is calculated. Must be one of: • STATIC Indicates a consistent, static amount, per payment • BALANCE Indicates that the outstanding balance for the account is paid per period • CALCULATED Indicates that the payment amount is variable and calculated using a pre-defined algorithm
}			
directDebit	Object	Conditional	Represents a regular direct debit from a specified bank account. Mandatory if paymentScheduleUType is set to directDebit
{			
isTokenised	String	Optional	Flag indicating that the account details are tokenised and cannot be shared. False if absent. If false then bsb and accountNumber should not be expected to be included
bsb	String	Optional	The unmasked BSB for the account to be debited. Is expected to be formatted as digits only with leading zeros included and no punctuation or spaces. Is required if isTokenised is absent or false
accountNumber	String	Optional	The unmasked account number for the account to be debited. Is expected to be formatted as digits only with leading zeros included and no punctuation or spaces. Is required if isTokenised is absent or false
paymentFrequency	ExternalRef	Mandatory	The frequency that payments will occur. Formatted according to ISO 8601 Durations (excludes recurrence syntax)

Field	Type	Mandatory	Description
calculationType	Enum	Mandatory	The mechanism by which the payment amount is calculated. Must be one of: • STATIC Indicates a consistent, static amount, per payment • BALANCE Indicates that the outstanding balance for the account is paid per period • CALCULATED Indicates that the payment amount is variable and calculated using a pre-defined algorithm
}			
manualPayment	Object	Conditional	Represents a manual payment schedule where the customer pays in response to a delivered statement. Mandatory if paymentScheduleUType is set to manualPayment
{			
billFrequency	ExternalRef	Mandatory	The frequency with which a bill will be issued. Formatted according to ISO 8601 Durations (excludes recurrence syntax)
}			
}			
links	Object	Mandatory	
{			
self	URIString	Mandatory	Fully qualified link to this API call
}			
meta	Object	Mandatory	
{			
}			

Concession & Hardship Data

High Level Information

Title	Obtain the details of any concessions or hardship arrangements applied to a specific energy account
HTTP Method	GET
URI	/energy/accounts/{accountId}/concessions
Security Scope	energy:accounts.concessions:read
Pagination	Not Supported
Path Parameters	**accountId** ID of a specific account to obtain data for. This is a tokenised ID previous obtained from the Account List end point.
Query Parameters	None

Request Payload

Not applicable

Response Payloads

HTTP Response Code: 200 OK

Field	Type	Mandatory	Description
data	Object	Mandatory	
{			
concessions	Array of Objects	Mandatory	Array may be empty if no concessions exist
[{			
displayName	String	Mandatory	The display name of the concession
additionalInfo	String	Optional	Display text providing more information on the concession
additionalInfoUri	URIString	Optional	Optional link to additional information regarding the concession
startDate	DateString	Optional	Optional start date for the application of the concession
endDate	DateString	Optional	Optional end date for the application of the concession

Field	Type	Mandatory	Description
dailyDiscount	AmountString	Conditional	Daily discount value due to the concession. At least one dailyDiscount, monthlyDiscount, yearlyDiscount and percentageDiscount must be provided
monthlyDiscount	AmountString	Conditional	Monthly discount value due to the concession. At least one dailyDiscount, monthlyDiscount, yearlyDiscount and percentageDiscount must be provided
yearlyDiscount	AmountString	Conditional	Annual discount value due to the concession. At least one dailyDiscount, monthlyDiscount, yearlyDiscount and percentageDiscount must be provided
percentageDiscount	RateString	Conditional	Percentage of each invoice to be discounted due to the concession. At least one dailyDiscount, monthlyDiscount, yearlyDiscount and percentageDiscount must be provided
}]			
}			
links	Object	Mandatory	
{			
self	URIString	Mandatory	Fully qualified link to this API call
}			
meta	Object	Mandatory	
{			
}			

Implementation Considerations

A full binding standard applicable to the energy designation has not yet been defined and there is no existing implementation that could be impacted by this proposal. As a result there are no implementation or transition considerations to explore.