

Data Standards Body

Technical Working Group

Decision Proposal 260 – Energy Closed Accounts

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Context

The current rules state the following as required consumer data for closed accounts in energy:

Part 3—CDR data that may be accessed under these rules— energy sector

...

3.2 Meaning of *required consumer data* and *voluntary consumer data*—energy sector

...

- (7) Despite subclause (2), for an account that is closed at a particular time, each of the following is not ***required consumer data***:
 - (a) CDR data held by AEMO, other than metering data;
 - (b) CDR data held by a retailer, other than billing data; and
 - (c) CDR data that is not excluded by paragraph (a) or (b), but relates to a transaction or event that occurred more than 2 years before that time.

Whilst the technical standards allow sharing of metering and billing data for closed accounts, the data set include fields that are not explicitly stated within the rules as required data for closed account. This means the data holder would need to provide such fields to be schema compliant.

This decision proposal is being raised to consult on recommended changes to ensure closed account information can be shared in a schema compliant manner and in alignment with the rules.

Decision To Be Made

Define changes to energy APIs to enable sharing of required consumer data for closed accounts as defined in the rules in schema compliant manner.

Identified Options

Only a single option is presented and recommended in this proposal. This recommendation has been defined to minimise cost and impact to the in-flight retailer implementations.

Feedback on the suitability of this recommended approach, or appropriate alternatives would be welcome as feedback on this proposal.

Current Recommendation

The option being recommended involves three specific changes:

- Introduce Account Status Flag
- Add Query Parameter to filter based on Account Status
- API Field changes

They are described in detail in the following sections.

Account Status Flag

The recommendation is to introduce a flag in relevant energy APIs to indicate if an energy account is open or closed. This will enable conditionality on the exclusion of data when an account is closed.

The DSB recommends adding the following field to be consistent with banking standards:

Name	Type	Required	Description
openStatus	string	optional	Open or closed status for the account. If not present then OPEN is assumed

Query Parameter to filter based on Account Status

The recommendation is to introduce a query parameter in the Get Accounts API to enable filtering results for open, closed or both types of accounts. This would be determined by the value of the account status flag.

The DSB recommends the following query parameter to be consistent with banking standards:

Name	In	Type	Required	Description
open-status	query	string	optional	Used to filter results according to open/closed status. Values can be OPEN, CLOSED or ALL. If absent then ALL is assumed

API Field Changes

The DSB recommends the following changes be made to the energy endpoints tabled below:

Endpoints	Field	Change Type	Comments
Get Energy Accounts	openStatus	New	Open or closed status for the account. If not present then OPEN is assumed

Endpoints	Field	Change Type	Comments
	creationDate	Modified	Field made conditional based on value of openStatus. Mandatory for open accounts
	planOverview	Modified	Field made conditional based on value of openStatus. Mandatory for open accounts
Get Energy Account Detail	openStatus	Added	Open or closed status for the account. If not present then OPEN is assumed
	creationDate	Modified	Field made conditional based on value of openStatus. Mandatory for open accounts
	planOverview	Modified	Field made conditional based on value of openStatus. Mandatory for open accounts
	planDetail	Modified	Field made conditional based on value of openStatus. Mandatory for open accounts

Additional Notes

The following notes are provided for clarity:

- The Get Energy Accounts API will return accountIds and servicePointIds associated with closed accounts which can be used to retrieve metering and billing data for closed accounts. The standing data end points are not expected to return servicePointIds for closed accounts as AEMO is unable to determine the association.
- The balance returned for closed accounts should be \$0.

Implementation Considerations

It is believed that the recommendation presented will be of low impact to participants and reduce complexity in providing required data for closed accounts in a schema compliant manner.

If the recommendations are accepted, the changes will be applicable from the 15th of November aligning with the energy sector go-live date.