Data Standards Body

Technical Working Group

Decision 260 – Energy Closed Accounts

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Decision Approved By Chair: 9th September 2022

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 presents changes to the energy standards 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 a schema compliant manner.

Feedback Provided

The original proposal and the associated feedback can be found at:
https://github.com/ConsumerDataStandardsAustralia/standards/issues/260

The proposal presented a single option with the following three changes which are described below:

1. Introduce an Account Status Flag in Energy Account APIs
2. Add a Query Parameter to filter based on Account Status
3. API Field changes in relevant schemas to apply conditionality to support the closed accounts requirements

Summary of feedback

- Overall feedback supported all the proposed changes
- Feedback indicated that, unlike banking, balances for closed accounts in the energy sector can be non-zero where customers have credits or they are overdue on closed accounts. This has been incorporated in this decision.
- Feedback was also received requesting clarification on behaviour of specific energy APIs in relation to closed account

Decision For Approval

The decision supported by CDR participants is to implement the following changes to the energy standards allowing closed account information to be shared in a schema compliant manner and in alignment with the rules:

1. Account Status Flag

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 flag would be defined as below, in alignment with banking standards:

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

2. Query Parameter to filter based on Account Status

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 query parameter would be defined as below in alignment 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

3. API Field Changes

The following changes will 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
	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 DSB will draft and publish guidance with support from Treasury and ACCC which would clarify how specific energy APIs should behave in relation to a closed account.
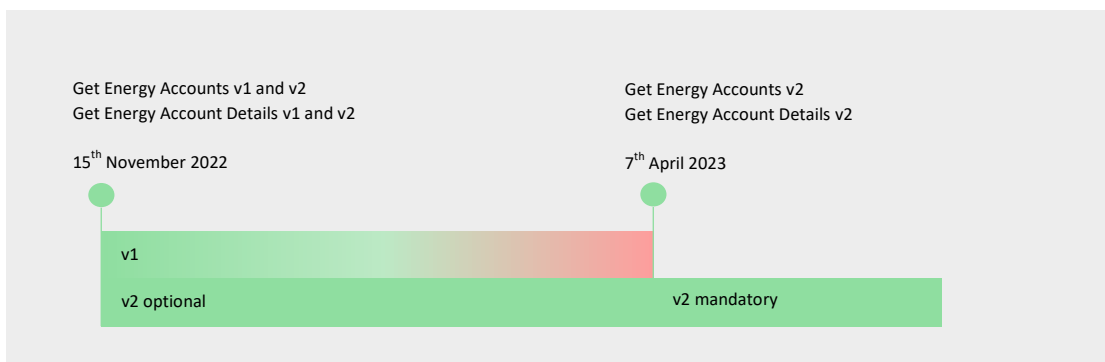
Implementation Considerations

The decision proposal recommended the changes to be applicable from the 15th of November aligning with the energy sector go-live date.

Feedback from one respondent indicated they would not be able to accommodate the changes presented in this decision in time for 15th of November as they are mid implementation. Other respondents indicated they would prefer to go live with the changes to minimise future changes.

The DSB considered the feedback and recommend the following phased approach:

- Two versions of the Get Energy Accounts and Get Energy Account Details APIs will be included in the standards for energy go-live on 15th November 2022:
  - v1 will be the version that Data Holders may have already implemented without any changes approved as part of this decision
  - v2 will contain the changes to approved as part of this decision to specifically support closed accounts
- Data Holders may choose which version to implement for 15th November 2022. To be clear, this means that a Data Holder will be compliant if they implement either v1 or v2 of the energy account end points. It will not be required that both v1 and v2 of the energy account end points are present simultaneously[1]
- Payloads for Closed Accounts information for v1 APIs must be presented in a schema compliant fashion. The guidance to implementers will be to provide values for all mandatory fields and to select reasonable default values and structures if the data is not available for closed accounts
- **7th April 2023** will be set as the future dated obligation (FDO) when v2 will become mandatory version all DH must implement and support
- Data Holders who have implemented v1 for November 15th can implement v2 any time prior to the FDO stated above

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[1] Note that the approach of requiring one of V1 and V2 but not both is not a normal approach for end point versioning and is not intended to become a standard approach. It is only being adopted in this scenario as the implementation dates are very close and these are new end points to the ecosystem so there is no current client install base