

# Data Standards Body

## Noting Paper – Energy Move Workshop Outcomes

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### Context

This noting paper summarises the outcomes of a workshop run by the Data Standards Body. This workshop was conducted as the result of a request by energy Retailers and AEMO during consultations, conducted by AEMO, on a change to the MSATS processes and data structures. This change was being proposed to address the issue with customer move-in/move-outs and the implications for the sharing of usage data for customers that have switched energy Retailer.

The specific issue being addressed by the MSATS changed is summarised as follows:

- AEMO currently holds the usage for metering locations in scope for the CDR and is able to provide this data for the period a Retailer is financially responsible for the National Metering ID (NMI).
- AEMO is not made aware of situations where the financially responsible Retailer changes but the customer doesn't change. AEMO is always not made aware if the customer changes but the financially responsible Retailer doesn't change.
- As a result, if a customer switches Retailer then they will only be able to share usage data under CDR from the moment that they switch Retailers onwards. All previous history will be inaccessible for sharing

To resolve this situation AEMO proposed a change to the MSATS data and processes so that they would be aware of these change scenarios without the need for the sharing of personally identifiable information.

AEMO held two workshops to review this proposal. During these workshops it was identified that Retailers must set the field during a move-in/move-out process for the solution to be effective. The Retailers raised concerns as to how they should determine if the user they are onboarding is the current owner of the NMI.

The workshop conducted by the Data Standards Body was specifically designed to address this question.

## Workshop Overview

### Goal

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The goal of the workshop run by the DSB was to:

*Determine a viable, holistic approach for allowing customers, who have switched retailers, to safely share their historic usage under the Consumer Data Right.*

This goal was defined in response to the consultations and engagement processes that had already been conducted. The intention of the workshop was not to revisit the issues that had previously been addressed by AEMO consultations. The intention was to specifically address the concerns raised by Retailers regarding the ability to identify if a new customer is the current owner of the NMI they are being onboarded with.

### Methodology

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The workshop was run with a high degree of interactivity to allow for participants to provide as much feedback as possible.

The agenda was broadly run along the following lines:

1. Provide scope and context to the workshop in the form of a short presentation (see Appendix A for the slides presented during this agenda item)
2. Conduct an open Q&A to clarify the options and context
3. Conduct an open facilitation using breakout groups to identify any questions about the pre-determined options and to elicit feedback on any additional options that could be considered
4. Play back by breakout groups of their discussions to all workshop participants
5. Conduct an open facilitation using breakout groups to identify preferred options, or options that would be considered non-viable
6. Play back by breakout groups of their discussions to all workshop participants

The workshop was conducted online and feedback was captured via recording of the session and via a Miro board used by all breakout groups to collaborate.

## Workshop Outcomes

### Options Identified

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There were four options identified before the workshop and two options identified during the workshop. These options are:

#### Option 1: No Facilitation

The process for validating whether the user is the current owner of the NMI would be developed by the Retailer without support from the CDR program or AEMO. This is the default option if no

additional changes are made and Retailers need to confirm NMI ownership during a move-in/move-out process.

#### Option 2: Retailer as ADR

The move-in Retailer becomes an ADR and requests data sharing with the old retailer. If customer declines to provide consent then either a separate process (ie. option 1) is used or the customer is not flagged as the current owner of the NMI. Note that this option only works via an online channel. It would not work via paper or a call center channel.

#### Option 3: Data Holder to Data Holder direct call

A voluntary Data Holder to Data Holder API is added to the CDR standards with a new InfoSec profile to govern this interaction. During a move-in/move-out the new Retailer would send data about the customer and NMI to the current Retailer who would respond only with true or false indicating if the customer is a current owner or not.

#### Option 4: AEMO facilitated call

This option would be the same as option 3 but the call is facilitated via AEMO. The advantages of this option over option 3 is that there is no need for an additional InfoSec profile to be designed or built and the identity of the new Retailer would be masked from the current Retailer. The disadvantage would be the need for budget and implementation from AEMO.

#### Option 5: Utilise existing NMI discovery mechanism

This option was suggested by community members during the workshop and was then included in the breakout sessions. Under this option the existing NMI discovery mechanism, that all Retailers already have access to, would be used to obtain key information that could be used to verify customer ownership by asking specific questions. The key viability question for this option is whether this mechanism has enough information to be useful.

#### Option 6: Central utility for customer identity exchange

This option was suggested by community members during the workshop and was then included in the breakout sessions. Under this option a central bureau of customer identity information (analogous to Super Stream for the superannuation industry) would be maintained centrally to support all Retailers during the move-in/move-out process.

## Summary of Feedback

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The summary of the insights extracted from the extensive feedback provided during the workshop is as follows:

- The option 1, the default option, was considered viable as a solution and was even preferred by some participants. This is a critical insight, especially when combined with a strong preference for option 2 as an alternate option. This insight indicates that, if the MSATS change was made, there are multiple options for adapting the move-in/move-out process that are open to Retailers that would not require CDR rules or standards changes.
- There was no single option that was preferred. During the workshop different groups preferred different options and sometimes multiple options were preferred. The key insight

from this feedback is that there are options that are available with differing levels of sophistication or implementation cost that the Retailers could choose from to progress with implementing an amended move-in/move-out process at their discretion.

- Various concerns regarding vulnerable groups and situations (such as domestic violence) were canvassed and it appears that each of these concerns could be addressed satisfactorily during the move-in/move-out process even with the default option being adopted. This was mainly a recognition that any vulnerable person concerns arising from a move-in/move-out process (which are important to consider) are existing and would not be made worse by the changes being proposed.

## Recommendations

Based on the entire process undertaken and the insights generated by the workshop the DSB makes the following recommendations:

1. That AEMO proceed with the proposed MSATS change as it will materially improve CDR based data sharing in the energy sector.
2. That the DSB and Data Standards Chair commit to conducting consultations with energy sector participants to add features to the CDR Data Standards to reduce the cost and improve the customer experience of implementing the MSATS change during the move-in/move-out process.

# Appendices

## Appendix A: Workshop Slides

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Below are the slides that were presented at the commencement of the workshop.

### Context

- AEMO holds the usage for metering locations in scope for the CDR
- Usage data can be provided for the period a retailer is the FRMP
- If the FRMP changes but the customer doesn't this is not known
- If the customer changes by the FRMP doesn't this is not known

#### Complication

If a customer changes retailers then the next day they can only share one day of usage data under CDR, no matter how long they have been at the site

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### Context cont...

- AEMO has held two workshops to review a proposal to add a field to MSATS that would capture the date that the NMI last changed customer
- This could be used to safely share data for a customer even if the FRMP has changed
- For this solution to work retailers must set the field during a move-in/move-out

#### Complication

How does the Retailer know that the user they are onboarding is the current owner of the NMI?

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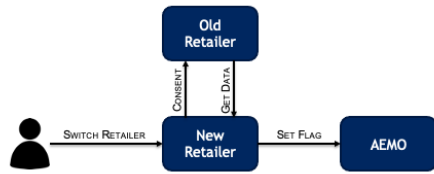
### Option 1 - No Facilitation



- The process for validating whether the user is the current owner of the NMI is at the discretion of the Retailer
- CDR and AEMO do not provide any additional support
- This is the default option if no additional changes are made

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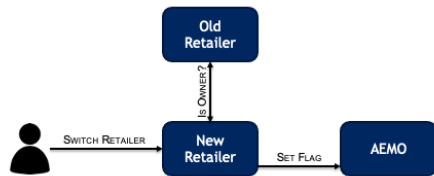
## Option 2 - Retailer as ADR



- The move-in Retailer becomes an ADR and requests data sharing with the old retailer
- If customer declines then either a separate process is used or the customer is not flagged as continuing
- This option only works via an online channel. It would not work via paper or call center

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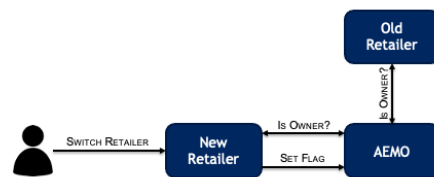
## Option 3 - DH to DH Direct call



- A voluntary DH to DH API call is added to the CDR standards with a new InfoSec profile
- The New Retailer would send data about the customer and NMI to the Old Retailer who would respond only with true or false indicating if the customer is a current owner
- Could be extended to include additional flags in specific cases such as domestic violence or the presence of life support hardware

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## Option 4 - AEMO Facilitated call



- Same as option 3 but the call is facilitated via AEMO
- Removes the need for an additional InfoSec profile and build
- The retailers do not directly interact

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