Customer Switching Q&A Session

August 2021

Please note that this meeting will be recorded and will be shared with the participants of the meeting so that it may be used as a training tool within their organisations.

Agenda

1. Introduction and meeting approach

2. Customer Switching changes

3. Inflight/Cutover

4. Testing

5. Contingency

6. Q&A

7. Next steps

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Introduction

AEMO Competition Law Meeting Protocol

Before we start this meeting, an important notice relating to _compliance with Competition Law_

We must not discuss, or reach or give effect to any agreement or understanding which relates to:

- Pricing
- Targeting (or not targeting) customers
- Tendering processes
- Sharing competitively sensitive information
- Breaching confidentiality obligations

Each entity must make an independent and unilateral decision about its commercial positions

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We acknowledge the Traditional Owners of country throughout Australia and recognise their continuing connection to land, waters and culture. We pay our respects to their Elders past, present and emerging.

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Online forum housekeeping

1. Please mute your microphone, this helps with audio quality as background noises distract from the information being shared.

2. Please switch off your video, AEMO will be showing a presentation.

3. If you have dialled in via phone, could you please email ercf@aemo.com.au your name and organisation for our records.

4. Be respectful of all participants and the process:
    1. Speak one at a time – refrain from interrupting others.
    2. Share the oxygen – ensure that all members who wish to have an opportunity to speak are afforded a chance to do so.
    3. Maintain a respectful stance toward towards all participants.
    4. Listen to other points of view and try to understand other interests.
    5. Share information openly, promptly, and respectfully.
    6. If requested to do so, hold questions to the end of each presentation.
    7. Remain flexible and open-minded, and actively participate in meetings.

Meeting approach

Presented by Meghan Bibby

Objective of this session

Please note that this meeting will be recorded and will be shared with the participants of the meeting so that it may be used as a training tool within their organisations.

This session is intended to be a Customer Switching Q&A to help you to understand what to expect in pre-production and production.

AEMO understands some participants have indicated that they are finding the multiple regulatory changes over the next 2 months challenging and putting at risk their change capability.

We hope this session will allow your questions on the Customer Switching changes to be answered.

Please feel free to ask questions throughout the session.

We ask that you utilise the Chat function for any questions or comments you may have.

This session is not intended to re-litigate:

- Obligation changes
- Effective dates
- Consultation process
- Solution design etc

https://aemo.com.au/consultations/current-and-closed-consultations/5ms-consolidation-process

Previous information and Q&A sessions - details

- Final merged 5MS and Customer Switching retail electricity market procedures effective 1 October 2021 available [here](#)

- Previous Customer Switching Information Sessions are available [here](#) as part of the Customer Switching consultation page

- Technical Specification Q&A Session – November 2020
  - [Presentation](#)
  - [Session notes](#)
  - [Sample CR1060 notification](#)

- Technical Information Session – August 2020
  - [MSATS 46.99 Technical Specification v1.02 March 2021](#)
  - [Presentation](#)
  - [Example NMI Discovery PRD Success](#)
  - [Example NMI Discovery PRD Error](#)
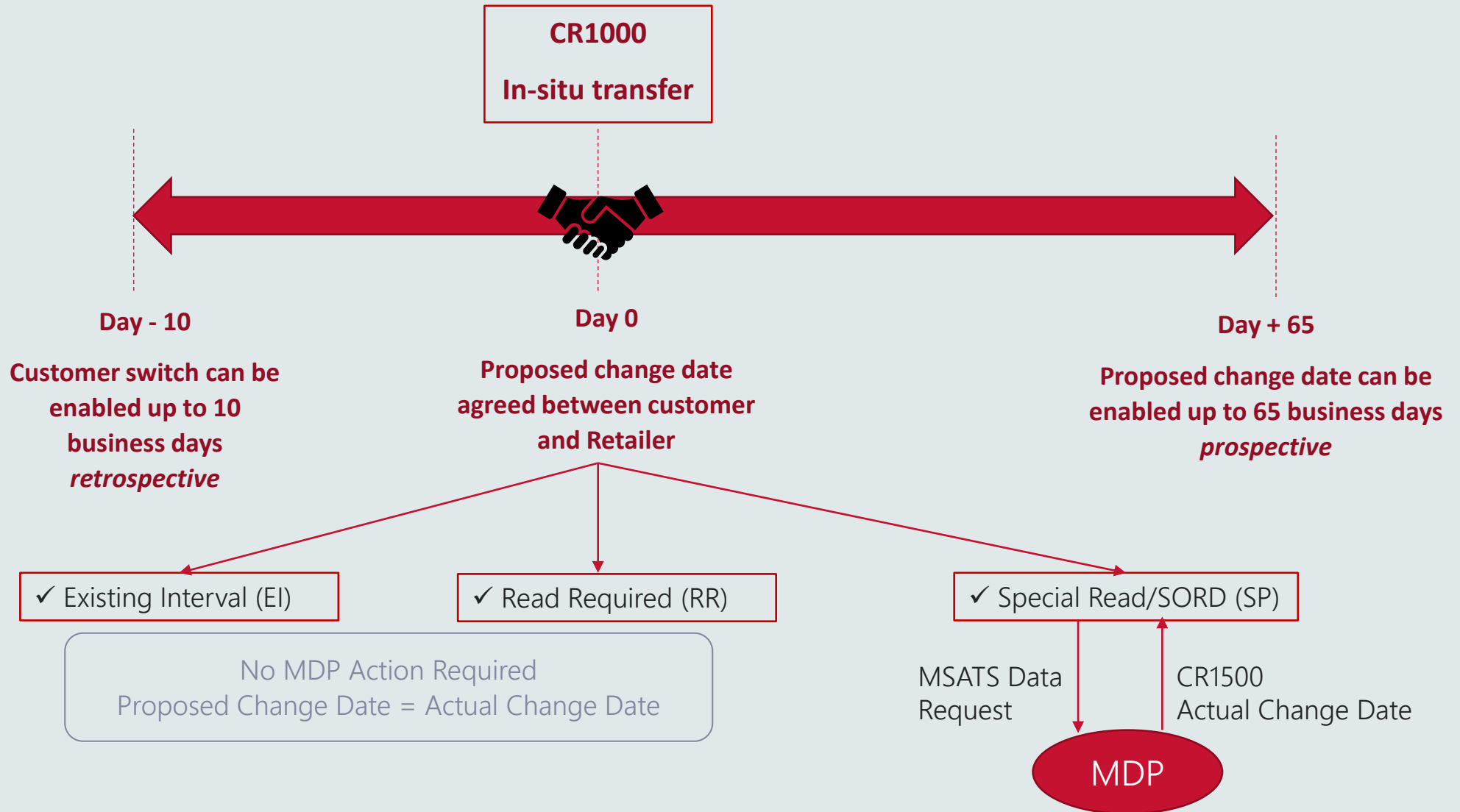 - [Scenarios Basic PRD](#)
  - [Scenarios Interval PRD](#)

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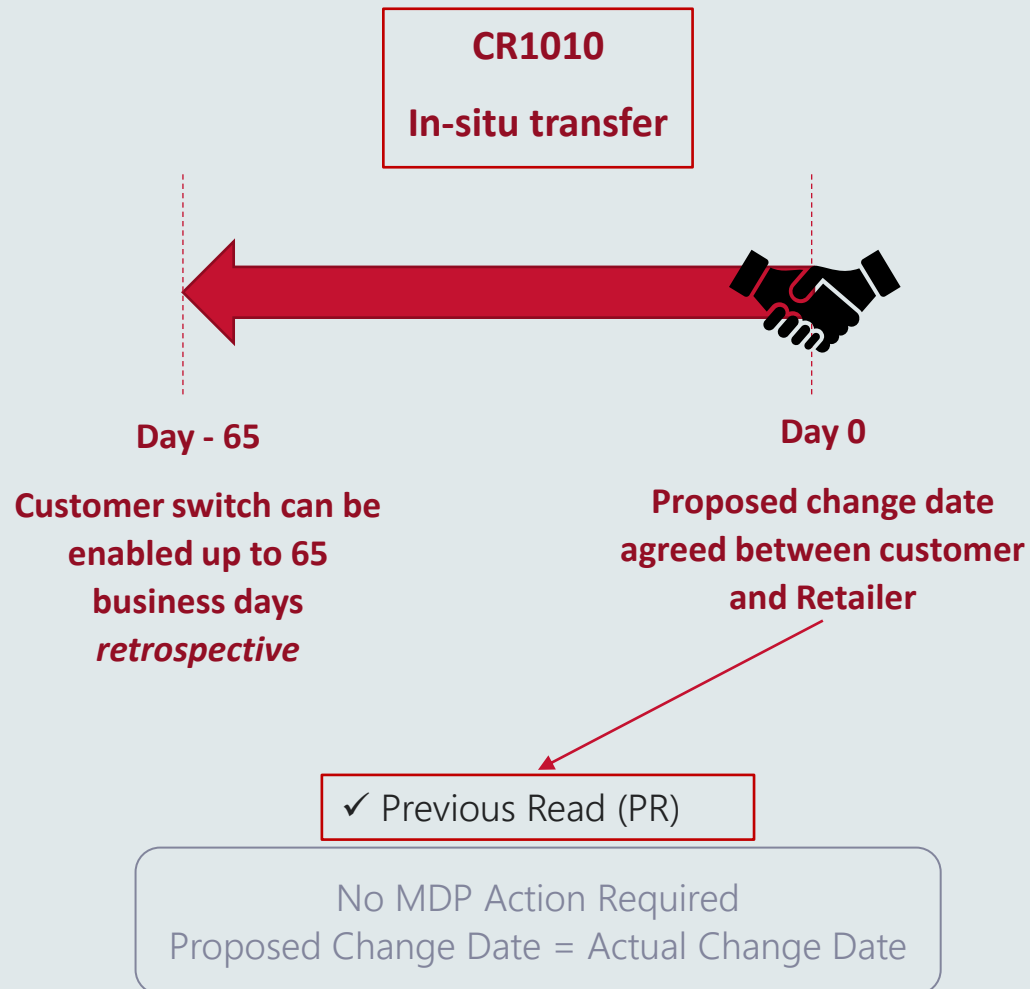AUSTRALIAN ENERGY MARKET OPERATOR

Changes

Presented by Jackie Krizmanic

Existing Change Requests

Existing CR Number	Code Description	Changes to the existing CR	Objection changes	Notification Changes
1000	Change Retailer	No CR1500 required except where read type code of SP is used. All remotely read interval meters (including MRIMs that have a ReadTypeCode of RWD) to use Existing Remotely Read Interval Meter (EI) as the Read Type Code.	Objections removed: • Badmeter • Badparty • Declined • Notaprd • Datebad • Debt • Contract Objection that remained: • Noacc (applies where a physical meter reading/energisation is required where the Read Type is SP)	All notifications of each stage of the CR only provided to: • New FRMP, and • Current MDP. Completed notification provided to: • New FRMP, • Current FRMP, • Current LNSP, • Current MDP, • Current MPB, • New MC, and • Current MC.
1010	Change Retailer (SMALL/ Retrospective only)	If Basic or MRIM (without a ReadTypeCode of RWD) a Previous Read Date (PR) to be obtained and input into the CR.	Objections removed: • Badmeter • Badparty • Declined • Notaprd • Datebad • Debt • Retro	As above

Transfer solution

CR1000

In-situ transfer

Day - 10

Customer switch can be enabled up to 10 business days *retrospective*

Day 0

Proposed change date agreed between customer and Retailer

Day + 65

Proposed change date can be enabled up to 65 business days *prospective*

✓ Existing Interval (EI)

✓ Read Required (RR)

✓ Special Read/SORD (SP)

No MDP Action Required
Proposed Change Date = Actual Change Date

MSATS Data Request

CR1500 Actual Change Date

MDP

Transfer solution

CR1010

In-situ transfer

Day - 65

Customer switch can be enabled up to 65 business days _retrospective_

Day 0

Proposed change date agreed between customer and Retailer

✓ Previous Read (PR)

No MDP Action Required
Proposed Change Date = Actual Change Date

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Existing Change Requests

Existing CR Number	Code Description	Changes to the existing CR	Objection changes	Notification Changes
1030	Change Retailer – Move In	No Changes	Objections removed: • Badmeter • Badparty • Declined • Notaprd • Contract Objection that remained: • Noacc (applies where a physical meter reading/energisation is required where the switch is a move-in)	All notifications of each stage of the CR only provided to: • New FRMP, and • Current MDP. Completed notification provided to: • New FRMP, • Current FRMP, • Current LNSP, • Current MDP, • Current MPB, • New MC, and • Current MC.
1040	Change Retailer – Move In Retrospective	No Changes	Objections removed: • Badmeter • Badparty • Declined • Notaprd • Contract Objection that remained: • Datebad (applies for a move-in retro because an Actual Read <u>must</u> be taken. CR1040 with a Read Type of PR) • Noacc (applies where a physical meter reading/energisation is required where the switch is a move-in)	As above.

Change Request Validation

- Accelerate Customer Switch – Remove Objections.

- Up front validations have been implemented to preserve data integrity.

	CR Code	1000		1010	1030	1040, 102X (except 1023)	1023	All
Read Type Code	Proposed Change Date	Prospective	Retro	Retro Only	Prospective Only	Retro Only	Retro Only	
PR	Previous Read Date	X	X	Type A	X	Type A	X	X
SP	Special Read	Type A	X	X	Type A / B	X	X	X
RR	Read Required	Type A / B	Type B	X	X	X	X	X
EI	Existing Interval Meter	Type B	Type B	X	Type B	Type B	X	X
GR	Greenfield NMI	X	X	X	X	X	Type C	X
UM	Unmetered Connection Pt	X	X	X	X	X	X	Type D

Type A	Basic / MRIM not RWD / MRAM	(i.e. manually read)
Type B	Comms 1-4 / 4C & 4D / MRIM with RWD / VICAMI / Sample	(i.e. remotely read)
Type C	Not metered	(NMI Status G (Greenfield))
Type D	Unmetered Supply	(Type 7)

Obsolete Change Requests

Obsolete CR Number	Code Description	Existing CR or New CR to use instead
1021	Error Correction – Missed CR1500	1025 or 1029
1022	Incorrect Transfer Date	1025 or 1029
1024	Transfer Missed	1025 or 1029
1027	End user moves out on or before CR completion date	1025 or 1029
1028	Non account holder sign contract	1025 or 1029
1026	Cooled off	1060 or 1029
1080	Change Retailer – Child NMI	1000
1081	Change Retailer – Child NMI – Retro Align Meter Reading	1010
1083	Change Retailer Child NMI – Move In	1030
1084	Change Retailer Child NMI – Move In - Retro	1040

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New Change Requests

New Change Request	Code Description	Use	Characteristics
1060	Reverse Retailer – Cooling Off	Replaced CR1026 where the customer cooled off before the cooling off period ended but after the transfer completed.	MSATS will determine actual change date by linking it to the related change request id. CR still requires a change date to be proposed.
1061	Reverse Retailer – Debt Objection	Replaced the previous FRMPs ability to raise an objection of DEBT	Can only be used in Vic jurisdiction and must be raised within 1 day of the original change request completing. MSATS will determine actual change date by linking it to the related change request id.

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In-Flight Change Requests/ Cutover

Presented by Meghan Bibby

In Flight Change Requests - Obsolete CRs

POST GO-LIVE

- MSATS will 'Reject' any new CR's received for retired Change Reason Codes upon receipt.
- Any obsolete CRs still in an open state 65 business days from 1 October 2021 will be rejected automatically by MSATS when BU500 reaches their actual date.

OBJECTIONS

- Will continue to be able to be raised until Objection Logging Period closes
- Can be removed until the Objection Clearing Period closes
- 21 days after implementation, objections for Customer Switching are obsolete.

CHANGE REQUEST PROCESSING

- Where an RDAT has been issued and a CR1500 is required, this will continue to be required to effect transfer completion.

NOTIFICATIONS

- Usual processing of PEND and COM will continue.

Inflight Obsolete Change Requests

Obsolete Change Request

Date raised pre 1 October

1 October 2021

Expiry

90 days/ 65 business days

- Notifications continue as per MSATS rules prior to 1 October 2021
- Any obsolete CRs still in an open state 65 business days from 1 October 2021 will be rejected automatically by MSATS when BU500 reaches their actual date.

Example	Stage 1	Stage 2	Stage 3	Notifications
CR1080	REQ 27/9/2021	PEND 2/10/2021	COM 5/12/2021	Pre 1 October 2021 notifications apply across all stages
Notifications	Current FRMP, New FRMP, Current MDP, New MDP, Current MPB, New MPB, Current MC, New MC	Current FRMP, New FRMP, Current MDP, New MDP, Current MPB, New MPB, Current MC, New MC	Current FRMP, New FRMP, Current MDP, New MDP, Current MPB, New MPB, Current MC, New MC, Current LNSP	

In Flight Change Requests - Continuing CRs

POST GO-LIVE

- MSATS will process and validate as per the new configuration any new CR's received on or after 1 October 2021.
- There is a single implementation of Configuration.
- All configuration will have effective date in line with above.
- Any continuing CRs still in an open state 65 business days from 1 October 2021 will be rejected automatically by MSATS when BU500 reaches their actual date.

OBJECTIONS

- Will continue to be able to be raised until Objection Logging Period closes as per:
  - the existing rules until 30 September, then
  - the new rules from 1 October 2021.
- Can be removed until the Objection Clearing Period closes
- 21 days after implementation, objections for Customer Switching are obsolete.

CHANGE REQUEST PROCESSING

- Where an RDAT has been issued and a CR1500 is required, this will continue to be required to effect transfer completion.
- Notifications will be issued as per the new configuration.

NOTIFICATIONS

- Will continue to be provided as per:
  - the existing rules until 30 September, then
  - the new rules from 1 October 2021.

Inflight Continuing Change Requests

Continuing Change Request

Date raised pre 1 October ← → Expiry

1 October 2021

90 days/ 65 business days

- Notifications change to new MSATS rules on 1 October 2021
- Any continuing CRs still in an open state 65 business days from 1 October 2021 will be rejected automatically by MSATS when BU500 reaches their actual date.

Example	Stage 1	Stage 2	Stage 3	Notifications
CR1000	REQ 27/9/2021	PEND 2/10/2021	COM 5/12/2021	Notification provided change to new rules on 1 October 2021
Notifications	Current FRMP, New FRMP, Current MDP, New MDP, Current MPB, New MPB Current MC, New MC, Current LNSP	New FRMP, Current MDP	Current FRMP, New FRMP, Current MDP, Current MPB, Current MC, New MC, Current LNSP	

Cutover

Release 46.99 to be released to production on 30 September 2021 in late afternoon/early evening (similar time of day as it went into pre-production on 29 July 2021).

Compliance is from 12:01am on 1 October.

30 Sep. 2021 — **1 Oct., 12:01 AM** — **1 Oct., 12:01 AM**
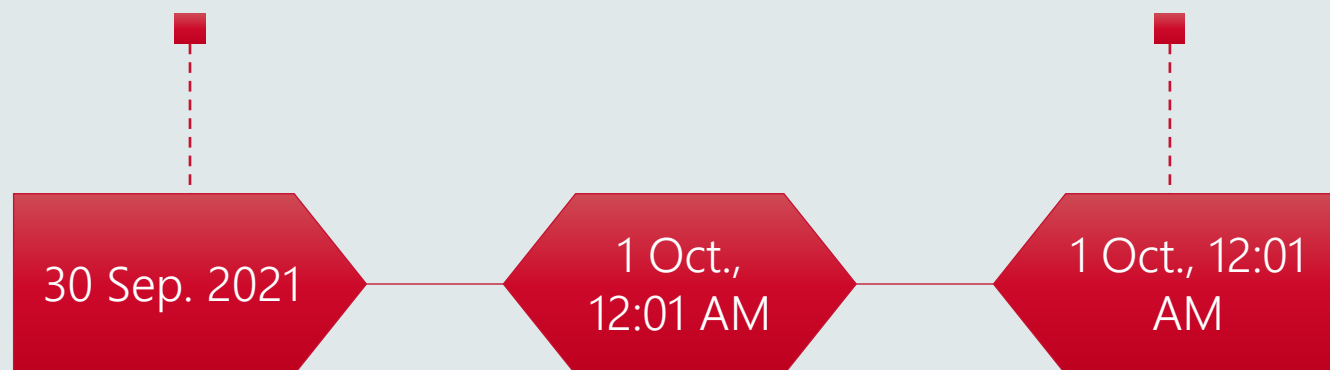
The Customer Switching rule change will kick in at 12:01am on 1 October. The 12:01am is based on market time which is Melb/Syd.

Testing

Presented by Meghan Bibby

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Testing to 13/8/2021

Defects raised: 3

- Issue #79 - AEMO Message NACK received for NMID Standing Data Request
  - ✓ Fix deployed 10 August
- Issue #62 - Type 2 NMI discovery requests return a '400 Bad Request' response for some NMIs
  - ✓ Fix deployed 10 August
- Issue #70 - RDAT was received for a CR1000 RR
  - ✓ Appears to be an issue with RDAT being issued for proposed date used prior to the rule change. It is logged with our internal Development team to be investigated and fixed.

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Contingency Planning

Presented by Michelle Norris

Customer Switching contingency options

- We're aware a lot of participants are testing using retrospective previous read date (PRD) transfers. If:
  - the PRD transfers are not fully functional for a participant, or
  - a PRD is not returned, or
  - a participant is not ready to use retrospective, then

AEMO suggests using prospective CR1000 which is an existing CR with configuration changes

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Customer Switching contingency options

Tier 1 meter read data availability, 3 MDPs have flagged issues with being fully compliant by 1 October 2021 for provision of their Tier 1 basic meter reads. Again, prospective CR can be used as an alternative.

Transfers occur now, CR1000 is working in pre-production and transfer functionality will continue from 1 October 2021.

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Customer Switching contingency options

AEMO has not identified any significant issues for Customer Switching for 1 October 2021.

Any issues identified from 1 October 2021 for Customer Switching are to be sent to the Support Hub

Hypercare is available from 1 October 2021.

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Customer Switching contingency options

Customer Switching and 5MS release is combined.

Precautionary Rule Change Request for 5MS contingency arrangements – currently open for AEMC consultation here.

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Q&A

Presented by Meghan Bibby

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Q&A

Questions on Notice from attendees

? Objection is not actioned by winning retailer (CR initiating party) or winning retailer withdraws CR after go-live as a result of objection resolution. How will the losing retailer be notified of the CR cancellation, as after go-live, losing retailer (non-initiating party) is only supposed to receive completion notification?

💬
- ➤ AEMO notes the changes to the notifications on 1 October mean the Current FRMP will only receive a Completed notification for in-situ inflight transfer CRs. If a cancellation of an objection or the CR itself occurs to an inflight transfer CR, then there will be no notifications of the cancellation. The NMI will remain with the current FRMP until notified through a COM.
- ➤ Objections on an inflight transfer CR become obsolete 21 days after 1 October 2021.
- ➤ A participant in a current role will still have the opportunity to check in MSATS to confirm the currency of their role for a NMI.
- ➤ Any inflight transactions that exceed 65 Business Days / 90 Calendar Days post go-live will be rejected.
- ➤ The change in the notifications provided reflects a core functionality in MSATS that applies the change globally across continuing CRs that are inflight as at 1 October 2021.
- ➤ Obsolete CRs are not included in this change.

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Q&A

Questions on Notice from attendees

? Objection is raised before cutover by losing retailer and winning retailer clears the objection after cutover. In this scenario, can a losing retailer send an objection withdrawal?

💬 Objections can only be lifted by the party who raised them. The winning retailer, in this case, could not clear the objection. The objection initiator can withdraw the objection after the implementation date.

? Regarding the completed CR1060. Our testing has revealed that the master report associated with the COM CR1060 seems to only be sent to the returning RP. Can you please confirm if all participants will receive the master report to enable them to update their systems to the previous participants?

💬 Only changing roles receive the C4 report on CR Completion. If both FRMP and MC change, then both receive C4 report, if only FRMP changes then only FRMP receives C4 report.

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Q&A

Questions on Notice from attendees

?

Explanation on why non-CATS CR 10xx Codes are part of validation for CATS CR 1060 process?

➢ Example #1:-
   - CATS Change Retailer 1000 Insitu successfully completes for Retailer
   - CATS 5055 Notification is submitted by Retailer, and process successfully completes
   - CATS CR1060 is raised by Retailer with Initiating Request ID for CR1000
   - AEMO Rejects CR 1060 Request because the CATS CR 5055 has been considered as most current Completed CATS CR

➢ Example #2:-
   - CATS Change Retailer 1000 Insitu successfully completes for Retailer. Actual Change Date is *06 August 2021*
   - CATS 5051 Notification is submitted by LNSP, and process successfully completes. Actual Change Date is *06 June 2021*
   - CATS CR1060 is raised by Retailer with Initiating Request ID for CR1000
   - AEMO Rejects CR 1060 Request because the CATS CR 5051 has been considered as most current Completed CATS CR.

💬

➢ CR reversal is implemented as a generic process.
➢ Any CR can be reversed, but only if it is the last completed CR.
➢ Technically, this is because of the 2-dimensional history model.
➢ The examples are only looking at the horizontal start/end date dimension. They are not considering the vertical created/updated dimension.
➢ Reversal is simply replacing the topmost row with the row directly underneath.
➢ Replacing the topmost row with any other row also reverses all rows above, which would be all intervening CRs.
➢ In the first example, if the CR1060 reversed the CR1000, it would also erase the CR5055.

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Q&A

Questions posted during the session

? Questions

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Next steps

Presented by Meghan Bibby

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Next steps

- Effective date is 1 October 2021.

- Continue testing in pre-production until September.

- Technical Specification Document – Publication
  - Update coming

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Thank you for your participation