INFORMATION EXCHANGE COMMITTEE
C/ - IEC SECRETARIAT – AEMO LTD
Level 22
530 Collins Street
Melbourne VIC 3000
Tel: (03) 9609 8000
FAX: (03) 9609 8080

B2B GUIDE

PREPARED BY:
VERSION: 1.0
EFFECTIVE DATE: 01 December 2017
STATUS: INITIAL

Approved for distribution and use by:

APPROVED BY: [NAME]
TITLE: [Title]

DATE: / / 20

VERSION RELEASE HISTORY

Version	Date	Author	Comments
1.0	01/09/2016		Initial version created as part of changes related to National Electricity Amendment (Updating the Electricity B2B Framework) Rule 2016 No. 6.

CONTENTS

1. INTRODUCTION 5
1.1. Purpose and Scope 5
1.2. Document Control 5
1.3. Related Documents 5

2. CONTEXT AND SUMMARY OF THE B2B CHANGES 6

3. COMMUNICATIONS MODEL 6
3.1. Initiator 7
3.2. Recipient 7
3.3. Notified Parties 7
3.4. Business Communications Model Changes 7

4. TABLE OF B2B COMMUNICATIONS 9

5. USAGE SCENARIOS 12
5.1. Service Orders 12
5.2. Customer and Site Details Notification 27
5.3. One Way Notification 31
5.4. Meter Data Process 32

6. BUSINESS PRACTICES 33
6.1. Service Order Process 33
6.2. CUSTOMER & SITE DETAILS PROCESS 38
6.3. One Way Notifications 40
6.4. Planned Interruption Notification (PIN) 42
6.5. Meter Fault and Issue Notification (MFN) 42
6.6. Notice of Metering Works (NMW) 42
6.7. Meter Data Process 43

TABLES

Table 1 : Table of B2B Transactions and Participants 9
Table 2 : Comparison of old Add/Alts Subtype with new Service Orders Types 18
Table 3 : B2B Service Order Types and Protected Periods 24
Table 4 : Summary of De-Energisation Methods and Reasons 24

FIGURES

Figure 1: Proposed New Connection Sequence - ACT 14
Figure 2 : Proposed New Connection Sequence - NSW 15
Figure 3 : Proposed New Connection Sequence - QLD 15
Figure 4 : Proposed New Connection Sequence - Tasmania 16
Figure 5 : Proposed New Connection Sequence - Victoria 17

Figure 6 : A Meter Exchange sequence where the MP is not changing 20
Figure 7 : A Meter Exchange process preceded by FRMP,MC,MDP,MP Role changes 21
Figure 8 : Example De-Energisation Process 22
Figure 9 : Example Re-Energisation Process 23
Figure 10 : De-Energisation Methods 23
Figure 11 : Example Life Support CSDN process where DNSP, MC or MP initiates process 28
Figure 12 : Example Life-Support CSDN process involving and Embedded Network 29

1. INTRODUCTION

1.1. Purpose and Scope

(a) This B2B Guide has been developed as a result of the B2B Framework changes from the Rule changes in relation to the Shared Market Protocol and Metering Competition, effective 1 Dec 2017. It was determined that certain content in the B2B Procedures up to v2.2 was no longer appropriate in a Procedure due to the nature of the Rule changes. However it was acknowledged that this information regarding standard business practices was still useful for participants to understand how industry processes are typically carried out.

(b) This Guide describes how B2B Communications are typically used in standard processes in the NEM. It aims to provide interested parties with an understanding of how B2B Communications defined in the B2B Procedures are used in the context of the broader industry scenarios, and to assist participants when forming their respective bilateral/commercial agreements.

(c) To the extent of any inconsistency between this Guide and any relevant Rules, Procedures, or jurisdictional instrument, the relevant jurisdictional instrument shall prevail to the extent of the inconsistency.

1.2. Document Control

(a) As this B2B Guide is not a B2B Procedure under the Rules, this document may be updated without the need for formal consultation.

(b) It is likely however, that this document is maintained and updated in line with any changes to the B2B Procedures and provided as supporting documentation as part of a B2B Procedure consultation, where appropriate.

(c) The industry working group (TBC) will be responsible for maintaining this document and any suggestions for amendments or inclusions should be put forward to this group via your industry representative.

1.3. Related Documents

Title	Location
Retail Electricity Market Procedures – Glossary and Framework	http://www.aemo.com.au/Electricity/National-Electricity-Market-NEM/Retail-and-metering/Glossary-and-Framework
B2B Procedure: Service Order Process	
B2B Procedure: Meter Data Process	
B2B Procedure: Customer and Site Details Notification Process	
B2B Procedure: One Way Notification Process	
B2B Procedure: Technical Delivery Specifications	

2. CONTEXT AND SUMMARY OF THE B2B CHANGES

(a) Metering Competition introduces a range of competitive services into the Electricity Industry that result in significant change to the pre-existing operating models. As a result, the proposed B2B processes have undergone review and change to:

(i) cater for the separation of responsibilities between metering services and DNSP provided services,

(ii) cater for the need to share information between different parties who may have an interest in a single customer supply point, and

(iii) support the remote capabilities of smart meters.

(b) The Service Order Procedures have undergone significant change. In order to ensure a clear distinction between a range of regulated electricity supply related services offered by DNSPs and a different set of metering related services offered by competitive Metering Providers, the terminology used in the service order process has been changed to include two groups of services: Supply Service Works and Metering Service Works and.

(c) The Service Order Procedures introduce the concept of a Notified Party into the Service Order process. The intention of this is to allow parties who are not involved directly in the provision of the requested service, but who nevertheless could be affected by the service, to be informed prior to the service being commenced and on completion of the service.

(d) The Customer and Site Details Notification Procedures have been changed in three areas.

(i) Additional information is now available in relation to Life Support customers. This information has been included as a result of Industry requests which had previously been deferred for consideration during Power of Choice.

(ii) Site access and hazard processes have been extended to allow greater sharing between the multiple parties that have an interest in the data.

(iii) New processes for sharing off-market metering installation details between old MPs and new MPs has been added to cater for an obligation under the Rules.

(e) The One Way Notification procedures have been expanded to cater for the exchange of additional information between participants.

(i) Two new processes which are tied directly to obligations under the Rules relating to planned interruptions, and informing Retailers of meter faults and failures have been created.

(ii) The Notice of Metering Works - has been included to facilitate the effective exchange of information after a meter installation has changed. This facility has been requested by Industry participants for some time but had been deferred for later consideration under Power of Choice.

(f) The Meter Data Process has been changed to include the two new remote services that are required to support features under the Minimum Services Specification for meters enabled with remote access capabilities. There has also been some change to the Verify Meter Data process which again has been included as a result of Industry requests that had previously been deferred for later consideration during Power of Choice.

3. COMMUNICATIONS MODEL

(a) Where possible, references to specific roles have been replaced with the more generic terms Initiator, Recipient and Notified Party(ies). This allows the B2B Procedures, and therefore the usage of B2B Communications to be more flexible by not restricting a specific participant role to either initiate a request or respond to a request. The aim is to allow the B2B Communications to cater for various business models and processes depending on the contractual/bilateral agreements made between parties.

3.1. Initiator

(a) In some instances, certain B2B Communications can only be initiated by certain roles and are specified in the Procedures.

3.2. Recipient

(a) For a given request, there is only one recipient. This recipient is the party responsible for the completion of the request and associated market messaging. For works that require multiple parties to carry out certain tasks, a separate request is generally needed for each task. This is to ensure that from a transaction perspective, only one party is providing a response to the request.

3.3. Notified Parties

(a) As there are multiple parties involved in providing services for a given NMI, to provide visibility to the related parties for the NMI of works being conducted on the site, there is also within the Service Order Process the ability to nominate a Notified Party or Parties for a given B2B Communication.

(b) As a Notified Party, there is no expectation from the Initiator to fulfil any activity in relation to the service order. A Notified Party may, however, choose to use a notification as a trigger for any internal business process that they so choose.

(c) Initially, Notified Party(ies) will be a mandatory field for all B2B Communications. By making this mandatory, it will be the responsibility of the party receiving the B2B Communication as a Notified Party to filter the notifications as they see fit. Except for the communications where no Notified Party is required.

(d) When providing a response to a request, the Recipient should populate the response with the same Notified Party(ies) as provided in the request.

(e) When sending cancellation or replacement service orders, the Initiator should include the same set of Notified Parties as in the original Service Order.

(f) The suggested Notified Parties for each B2B Communication is defined in **Error! Reference source not found.**.

3.4. Business Communications Model Changes

(a) For transactions only between an Initiator and a Recipient, the Business Communication Model remains unchanged. That is, there will continue to be *BusinessReceipt* and *BusinessAcceptance/Rejections* exchanged between participants

(b) For Service Order transactions only, the Initiator has the ability to include a list of Notified Parties in the Service Order content. When the Initiator sends the Service Order to the B2B Hub, the B2B Hub will route the original copy of the Service Order to the Recipient as it normally would, but will also route a copy of the Service Order to each of the Notified Parties. The message copy that is routed by the Hub to the Notified Parties will be changed by the Hub to signify it is a copy only (TBC). The copy of the Service Order is provided to Notified Parties as Information only. It is up to Notified Parties how they act (or not) on the information provided.

(c) For Service Order transactions only, the Recipient when responding to the Initiator with a *BusinessAcceptance/Rejection* must include in the response, the same full set of Notified Parties that were in the Service Order that it received from the Initiator. In this way the Hub will be able to route a copy of the *BusinessAcceptance/Rejection* to all Notified Parties where they can act on the information as they choose.

(d) For Service Order transactions only, the Recipient when responding to the Initiator with a ServiceOrderResponse must include in the response, the same full set of Notified Parties that were in the originating Service Order that it received from the Initiator. In this way the Hub will be able to route a copy of the ServiceOrderResponse to all Notified Parties.

(e) Notified Parties play no role in a Service Order transaction. The transaction copies are provided for information only. A Notified Party may choose to use the information provided as a way of determining if other parties are performing work which will have an impact on them, or they may choose to ignore the information.

(f) In order to avoid complex exception situations where (for example), the Recipient accepts a Service Order, but the Notified Party rejects the Service Order Copy causing an exception for the Initiator to deal with, it is proposed that the Hub will ensure that no message responses are sent from the Notified parties to the Initiator. The Hub alone will manage the message acknowledgement with the Notified Party (TBC).

4. TABLE OF B2B COMMUNICATIONS

Key	Description
RB	Retailer (This may be the Current FRMP in MSATS or may be a Prospective Retailer)
DB	Distributor (This will always be the current DNSP in MSATS)
MP	Meter Provider (MPB-This may be the Current MPB in MSATS or a Prospective MPB)
MDP	Meter Data Provider (This may be the Current MDP in MSATS or a Prospective MDP)
MC	Meter Coordinator (This may be the Current MC in MSATS or a Prospective MC)
X	Not applicable

Table 1 : Table of B2B Transactions and Participants

B2B Procedure	Transaction Type	Sub Type	Purpose	Initiator/s	Recipient/s	Notified parties(s)
Service Orders	Supply Service Works	Allocate NMI	The first step in a new connection process	RB	DB	X
Service Orders	Supply Service Works	Establish Permanent	Establish supply - Part of overall new connections process	RB	DB	MDP & MP or MC
Service Orders	Supply Service Works	Establish Temporary	Establish supply - Part of overall new connections process	RB	DB	MDP & MP or MC
Service Orders	Supply Service Works	Establish Temporary in Permanent	Establish supply - Part of overall new connections process	RB	DB	MDP & MP or MC
Service Orders	Supply Service Works	Supply Abolishment	Abolish supply	RB	DB	MDP & MP or MC
Service Orders	Supply Service Works	Supply Alteration	Alter the supply (eg upgrade / downgrade / move)	RB	DB	MP & MDP or MC
Service Orders	Supply Service Works	Tariff Change	A request from a retailer to change a customer's network tariff	RB	DB	MP or MC
Service Orders	Supply Service Works	Temporary Isolation	Temporary supply Isolation to facilitate 3rd party metering works or other	RB	DB	MDP & MP or MC
Service Orders	Metering Service Works	Exchange Meter	Swap an existing meter or meter installation to a new one	RB or MC	MP	DB & MDP
Service Orders	Metering Service Works	Install Controlled Load	Install or set up Controlled Load devices, including hot water	RB or MC	MP	DB & MDP
Service Orders	Metering Service Works	Install Meter	Install one or more meters or metering installations	RB or MC	MP	DB & MDP
Service Orders	Metering Service Works	Meter Investigation - Inspect	Inspect meter and report	RB or MC	MP (or DB for Type 5/6)	DB & MDP
Service Orders	Metering Service Works	Meter Investigation - Meter Test	Perform meter test	RB or MC	MP (or DB for Type 5/6)	DB & MDP

B2B Procedure	Transaction Type	Sub Type	Purpose	Initiator/s	Recipient/s	Notified parties(s)
Service Orders	Metering Service Works	Meter Investigation - Tamper	Check meter for evidence of tampering	RB or MC	MP (or DB for Type 5/6)	DB & MDP
Service Orders	Metering Service Works	Meter Reconfiguration	Reconfigure meter (eg Remotely re-program)	RB or MC	MP (or DB for Type 5/6)	DB & MDP
Service Orders	Metering Service Works	Move Meter	Move the location of a meter	RB or MC	MP (or DB for Type 5/6)	DB & MDP
Service Orders	Metering Service Works	Remove Meter	Remove meter where there are 2 or more meters (Removing all meters requires a Site abolish transaction to be used)	RB or MC	MP (or DB for Type 5/6)	DB & MDP
Service Orders	Re-energisation	NO SUB TYPE - Ignore if populated	Re-Energise the customer	RB	DB or MP or MC	MDP & DB & MP or MC
Service Orders	De-energisation	Main Switch Seal /Sticker	De-Energise the customer via the main switch using a seal or sticker over the main switch	RB	DB	MDP & MP or MC
Service Orders	De-energisation	Meter Point Isolation	De-Energise the customer via isolation within the metering installation	RB	MP or MC	MDP & DB & MP or MC
Service Orders	De-energisation	Local Meter Disconnect	De-Energise the customer through local operation of in-built meter relay	RB	MP or MC	MDP & DB & MP or MC
Service Orders	De-energisation	Pillar Box Pit Or Pole-Top	De-Energise the customer at a point upstream of the point of attachment	RB	DB	MDP & MP or MC
Service Orders	De-energisation	Recipient Discretion	De-Energise the customer via a method chosen by the service provider	RB	DB or MP or MC	MDP & DB & MP or MC
Service Orders	De-energisation	Remote	De-Energise the customer using remote means	RB	MC or MP	MDP & DB
Service Orders	De-energisation	Remove Fuse	De-Energise the customer via removal of the service fuse	RB	DB	MDP & MP or MC
Service Orders	De-energisation	Supply Isolation	De-Energise the customer upstream of the point of attachment	RB	DB	MDP & MP or MC
Service Orders	Special Read	Blank	Perform a field visit to obtain a meter reading	RB	MDP (or DB for Type 5/6)	X
Service Orders	Special Read	Check Read	Perform a field visit to obtain a meter reading	RB	MDP (or DB for Type 5/6)	X
Service Orders	Special Read	Final Read	Perform a field visit to obtain a meter reading	RB	MDP (or DB for Type 5/6)	X
Service Orders	Miscellaneous Services	NO SUB TYPE - Ignore if populated	An ad-hoc service request	Any	Any	Any
Customer and Site Details Notification	Customer Details Request	No Sub type	Request from a DNSP or an MP to a Retailer to supply the Customer and Life-support details	DB or MP	RB	X
Customer and Site Details Notification	Customer Details Notification	No Sub type	Customer and Life support details issued to DNSP and MP after update or on request	RB	DB and MP	X

B2B Procedure	Transaction Type	Sub Type	Purpose	Initiator/s	Recipient/s	Notified parties(s)
Customer and Site Details Notification	Site Access Request	No Sub type	Request from a Retailer to obtain a copy of the Site access and hazard information.	RB or MP or DB	RB or MP or DB	X
Customer and Site Details Notification	Site Access Notification	No Sub type	Publication of Site access and hazard information. Typically this is from a Retailer to an MP and DNSP whenever the data changes, but can also be from a DB or MP to a Retailer based on receiving a site access request	RB or DB or MP	DB & MP or RP	X
Customer and Site Details Notification	Pre Installation Data Request	No Sub type	Request from New MP to Old MP to provide information in relation to the current metering installation	New MP	Old MP	X
Customer and Site Details Notification	Pre Installation Data Response	No Sub type	Provision of information relating to current metering installation	Old MP	New MP	X
One Way Notifications	Notice of Metering Works	No Sub type	Informs the DNSP about the details of a recently completed metering works	MP	DB	X
One Way Notifications	Meter Fault and Issue Notification	No Sub type	Informs a retailer about a meter fault. Can be from an MP or and MC (Or a DNSP in the case of Type 5 and 6 meters)	MP or MC or DB	RB	X
One Way Notifications	Planned Interruption Notification	No Sub type	Informs a DNSP about planned interruptions on the network	RB or MC	DB	X
One Way Notifications	Network Tariff Notification	No Sub type	Informs a Retailer about an intent to change network tariffs	DB	RB	X
One Way Notifications	Meter Exchange Notification	No Sub type	A transaction to support forward planning of bulk meter rollouts.	RB or MP or MC	Any	X
Meter Data Process	Provide Meter data	No Sub type	Request to provide meter data	RB or DB	MDP	X
Meter Data Process	Verify Meter data	No Sub type	Request to verify meter data	RB or DB	MDP	X
Meter Data Process	Meter Data Notification	No Sub type	Provision/ delivery of meter data to market participants	MDP	RB & DB	X
Meter Data Process	Meter Installation Inquiry Request	No Sub type	Request to obtain meter status and electrical measurements and events from a remote meter	DB or RP	MP or MC	X
Meter Data Process	Meter Installation Inquiry Response	No Sub type	Provision of meter status and electrical measurements and events from a remote meter	MP or MC	DB or RP	X
Meter Data Process	Remote On Demand Meter Read Request	No Sub type	Request to obtain an on-demand of meter readings from a remote meter. (On demand Reads to be delivered to the Initiator via the Meter Data Notification Process)	RB or DB	MC or MDP	X

5. USAGE SCENARIOS

5.1. Service Orders

5.1.1. New Connections

(a) Multiple parties will be involved in actioning and completing what was previously known as a New Connection Service Order due to the Metering Competition changes. This process is considered the most complex of the high-volume services undertaken in the market.

(b) A range of separate Service Orders and a Notification of Metering Works transaction have been created to facilitate the overall communications for a New Connection. These transactions can be used in different sequences to facilitate the different jurisdictional and safety requirements that impact on the sequence of steps for a new connection in different Jurisdictions.

(c) A typical New Connection process, depending on the jurisdiction would reasonably expect to follow the following steps:

(i) End User or authorised party engages a Retailer and requests to be connected. Any prerequisite work required on the site to enable connection of supply is expected to have commenced prior to contacting the Retailer. (infrastructure/augmentation - This may involve the End User directly contacting the DNSP to determine any specific supply requirements).

(ii) Retailer sends an Allocate NMI Request to the DNSP. DNSP reviews accompanying paperwork as defined by jurisdictional requirements, and may also complete further analysis e.g. site check before accepting the request. The DNSP creates the NMI in their systems and sends a response to close the Allocate NMI SO Request and also generates a Create NMI CR to MSATS. Notified Party(ies) are not required for the Allocate NMI Request as participants associated with the new NMI will receive the COM notification via MSATS.

(iii) After the Create NMI CR in MSATS is at least in PEND status and having received the successful Service Order Response, the Retailer then send the Metering Services Works – Install Meter to the MP or MC.

(iv) The Retailer (or possibly the MC in relation to Metering Works) will then raise a series of Service Order transactions to facilitate the necessary field work. Depending on the jurisdiction these transactions may be issued in a particular sequence. The transactions could include:

(A) Metering Works Service order with Subtype ‘Install Meter’

(B) Supply Works Service Order with Subtype ‘Establish Permanent’

(v) After receiving a Metering Works Service Order with Subtype ‘Install Meter’, the MP schedules and attempts to install the meter and provides a SO Response. If the work was successful, then the MP will also send a NMW to the DNSP. It will also generate the Create Metering Installation Details CR in MSATS.

In some Jurisdictions the supply may need to have been established prior to the Meter Install. In this case, the MP could choose to require the Initiator to only send the Service Order once the supply has been installed or could choose to rely on the fact that they are a Notified Party to a ‘Supply Works- Establish Permanent’ Service Order, as a trigger for their field work. These process sequence details are up to negotiation between participants

(vi) After receiving a Supply Works Service Order with Subtype ‘Establish Permanent or Establish temporary or Establish Temporary in Permanent ‘, from a Retailer, the DNSP will check that any additional paperwork provided at this point is acceptable. Providing all paperwork is in order, the DNSP schedules and attempts to connect the supply for the NMI. The DNSP provides the Response to the Initiator and

Notified Parties, as well as generate the Change NMI CR to update the NMI Status in MSATS.

In some Jurisdictions, the DNSP may require the meter to have been installed prior to the supply being established, tested and energised. In this case, the DNSP could choose to require the Retailer to only send the Service Order once the meter has been installed or could choose to rely on the fact that they will receive a Notice of Metering Works (NMW) transaction once the metering has been installed, as a trigger for their field work. These details are up to negotiation between participants.

(d) Example variations

(i) NSW has the Accredited Service Provider Scheme (ASP Scheme) which means the customer engages the ASP directly to perform the service work. The metering service provider assigned by the Retailer will install the required metering and co-ordinate with the ASP for connection of supply.

5.1.1.1. Example Process Flows – New Connections

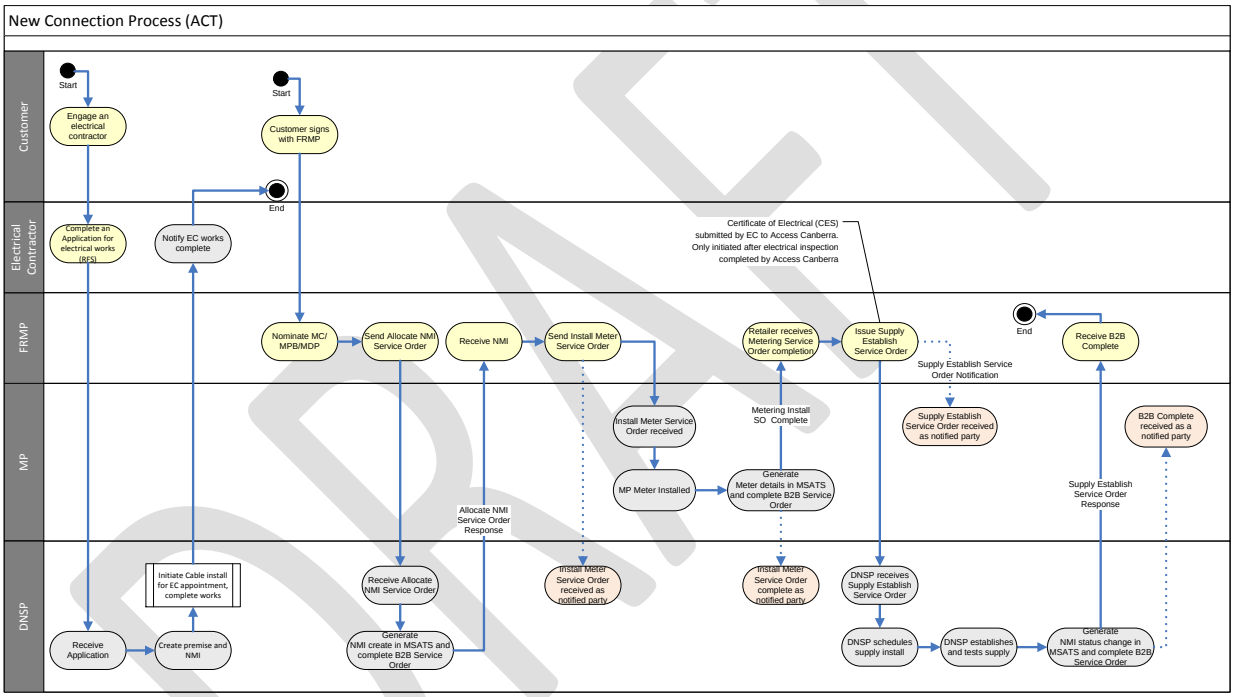
(a) In this section a series of process diagrams are shown that depict proposed sequences for undertaking a New Connection Process in various jurisdictions. This document does not prescribe the sequence that must occur, as that will be subject to specific (and possibly changing) jurisdictional safety requirements and is subject also to the preferred operating model of the participants in each jurisdiction.

It is recommended that participants in the various jurisdictions use these diagrams as a starting point for confirming the sequences that are most suitable for their particular circumstances.

Australian Capital Territory (ACT)

(b) The following process diagram depicts a proposed model for the New Connection process in ACT. In this model the Meter is shown as being installed before the Supply has been established with the Retailer issuing a Supply Establishment Service Order after receiving confirmation that the Metering Installation is complete.

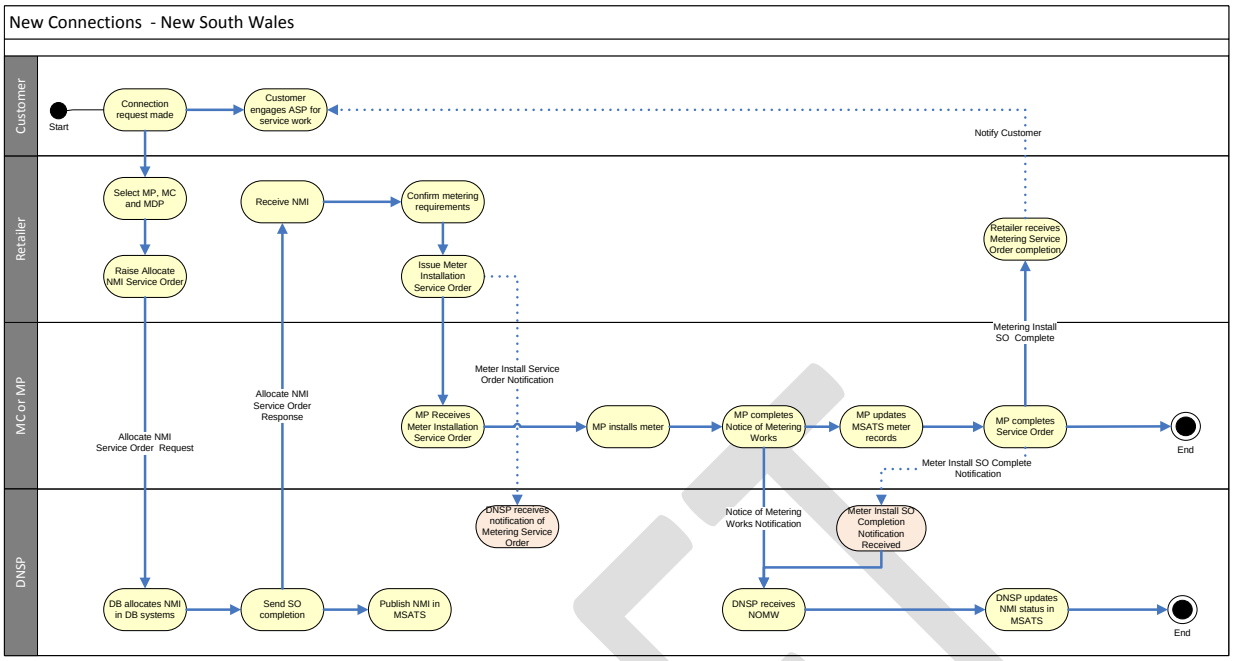
Figure 1: Proposed New Connection Sequence - ACT



New South Wales

(c) The following process diagram depicts a proposed model for the New Connection process in NSW. In this Jurisdiction the ASP is responsible for establishing supply under the customer direction. As a result there is no Supply Works transaction depicted in this model.

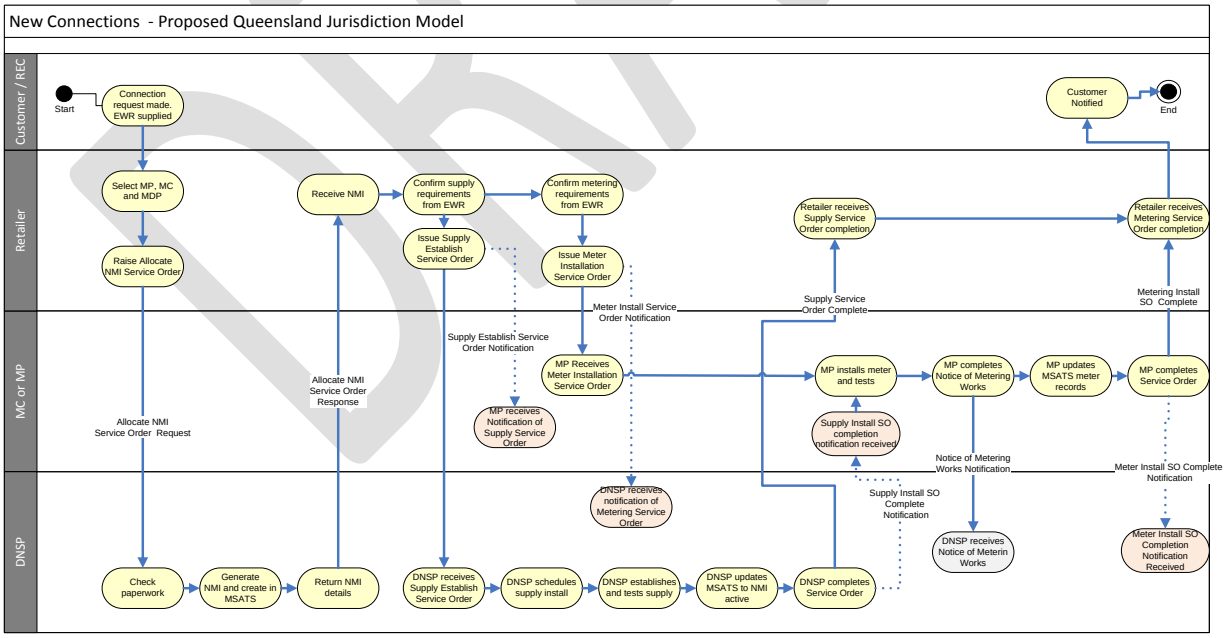
Figure 2 : Proposed New Connection Sequence - NSW



Queensland

(d) The following process diagram depicts a proposed model for the New Connection process in Queensland. In this model the Meter is shown as being installed after the supply has been established with the Supply Establishment Service Order Response copy being used as a trigger to commence the supply establishment activity.

Figure 3 : Proposed New Connection Sequence - QLD



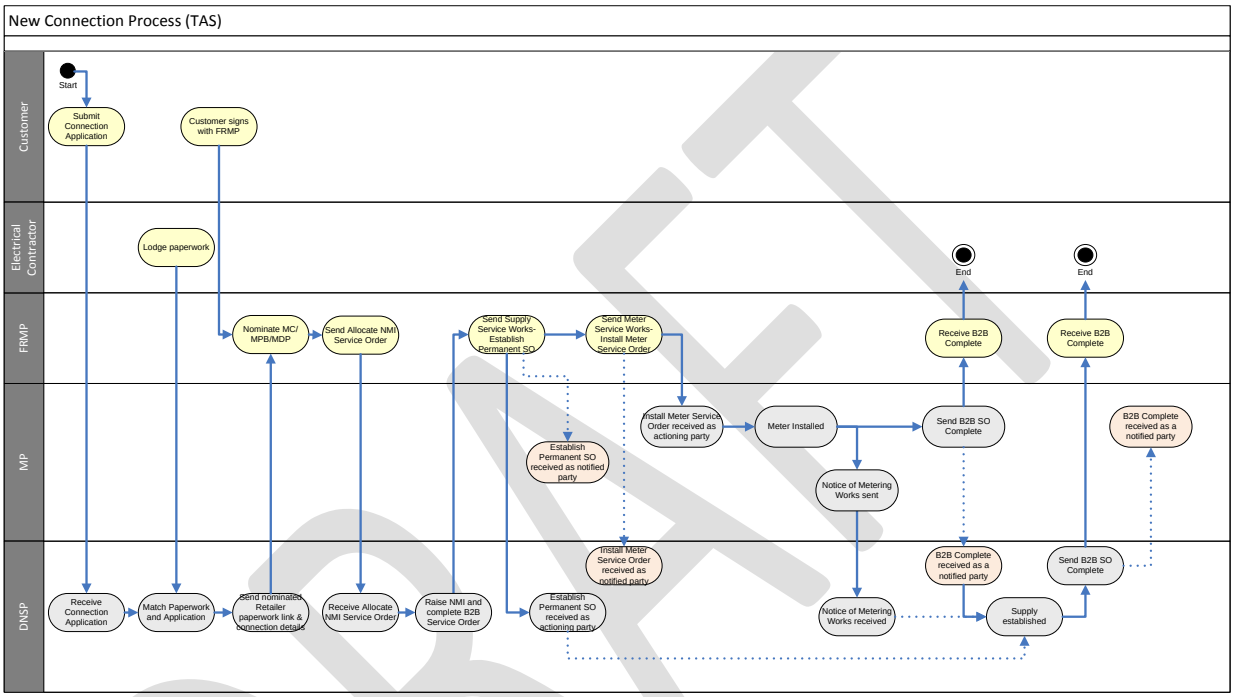
South Australia

(e) [Placeholder - Process flow currently in development]

Tasmania

(f) The following process diagram depicts a proposed model for the New Connection process in Tasmania. In this Jurisdiction connection applications are lodged by the customer with the DNSP prior to commencing the process. This preliminary step, whilst outside of the B2B process is depicted on the diagram for clarity. In this model the supply is shown as being established after the meter has been installed with the Notice of Metering Works (NMW) being used as a trigger to commence the supply establishment activity

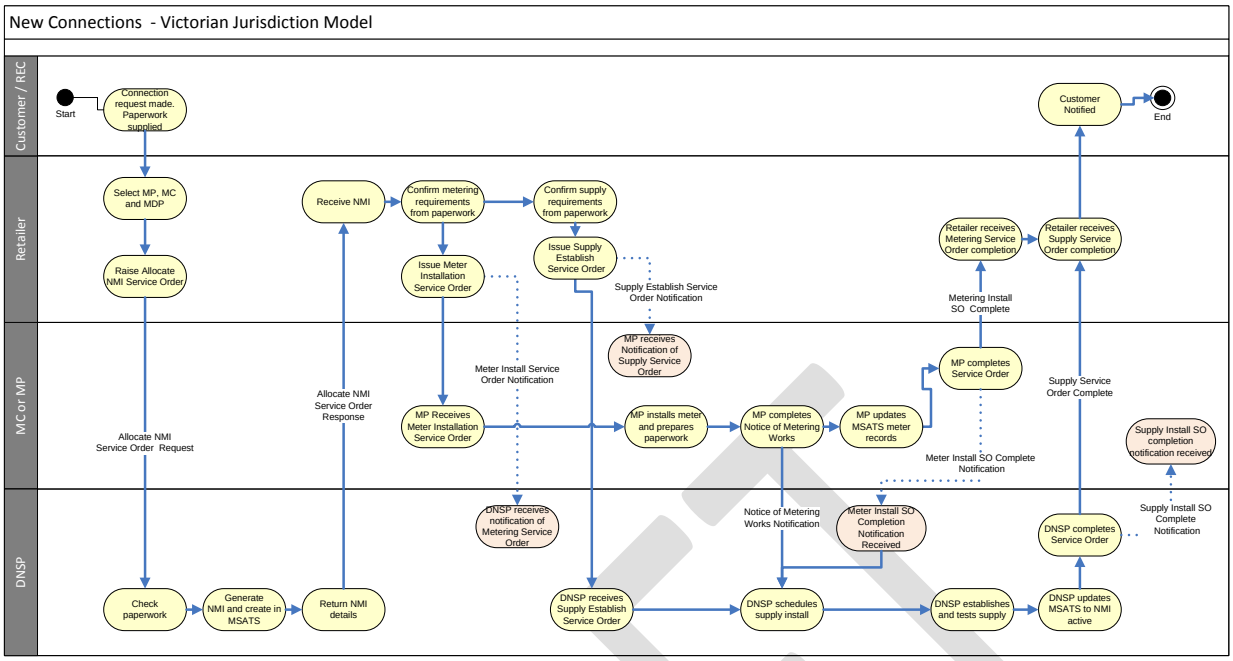
Figure 4 : Proposed New Connection Sequence - Tasmania



Victoria

(g) The following process diagram depicts a proposed model for the New Connection process in Victoria. In this model the Supply is shown as being established after the meter has been installed with the Notice of Metering Works (NMW) or the Metering Service Works – Install Meter Service Order Response copy being used as a trigger to commence the supply establishment activity

Figure 5 : Proposed New Connection Sequence - Victoria



5.1.2. Adds & Alts

(a) Similar to New Connections, the old Adds & Alts Service Order process has been replaced and the activities are now covered by the various Service Orders for Metering Service Works and Supply Service Works. Table 2 shows the original Adds and Alts Sub-Type and the suggested replacement transaction(s):

Table 2 : Comparison of old Add/Alts Subtype with new Service Orders Types

Former Add / Alts Subtype	Proposed Service Order Type and Subtype
Install Hot Water	The following Service order will be issued to the MP: • Metering Service Works - Install Controlled Load
Install Controlled Load	The following Service order will be issued to the MP: • Metering Service Works - Install Controlled Load
Move Meter	The following Service order will be issued to the MP: • Metering Service Works – Move Meter And additionally the following Service Order may be issued to the DNSP(except in NSW) if the supply connection point must also be moved: • Supply Service Works - Supply Alteration
Install Meter	This Service Order will be issued to an MP when an additional meter is required to be added to an existing connection: • Metering Service Works - Install Meter If the metering being installed requires a Supply Alteration (e.g. phase upgrade) then an additional transaction will be issued to the DNSP: • Supply Service Works – Supply Alteration If the customer, REC or Retailer requires Supply Isolation to facilitate this metering work an additional transaction may be issued to the DNSP: • Supply Service Works – Temporary Isolation
Remove Meter	This Service Order will be issued to an MP when a meter removal is required, but must not be issued if it will result in no meters remaining at the connection point (in that case an Abolishment is required) : • Metering Service Works – Remove meter If the customer, REC or Retailer requires Supply Isolation to facilitate this metering work an additional transaction may be issued to the DNSP: • Supply Service Works – Temporary Isolation

Former Add / Alts Subtype	Proposed Service Order Type and Subtype
Exchange Meter	This Service Order will be commonly used to facilitate meter churn for metering competition. This Service Order will be issued to an MP when a meter exchange is required: • Metering Service Works – Exchange meter If the Metering being exchanged requires a Supply Alteration (e.g. phase upgrade) then an additional transaction may be issued to the DNSP: • Supply Service Works – Supply Alteration If the customer, REC or Retailer requires Supply Isolation to facilitate this metering work an additional transaction may be issued to the DNSP: • Supply Service Works – Temporary Isolation
Other	A New Metering Works subtype has been created to allow for a request to remotely re-configure a meter: • Metering Service Works – Meter Reconfiguration The specifics of the meter reconfiguration request must be defined in the Special Instructions field in the service order and agreed contractually between the parties

(b) Customer/Retailer initiated changes - Where metering works is required (i.e. no changes to the supply connection point), a *ServiceOrderType* of 'Metering Service Works' is used with the appropriate sub-type.

(i) A temporary outage is likely in order to complete the metering works, but it is possible that the works be completed without requiring the DNSP to attend the site.

(ii) If isolation of supply is needed to safely conduct the metering works, the Initiator may be required to also raise a De-energisation of *SubType* 'Supply Isolation' to the DNSP.

(iii) If the MP is unable/unauthorised to re-connect supply and perform the necessary safety checks, the Initiator may be required to raise a subsequent Re-energisation request. Depending on if they are notified and/or any specific business rules exist, the DNSP may choose to first update the NMI Status to 'D' and after the Re-energisation request is received and actioned update the NMI Status back to 'A'.

(iv) Upon completion of the metering works, in addition to providing a Response to the original Request, if the metering has changed (reconfiguration or change of asset) the MP is expected to provide a Notice of Metering Works (NMW) to the DNSP, and update MSATS as required with the new metering installation details.

(c) Where a meter exchange also involves a change of MP, the New (i.e. nominated in the market, PEND status in MSATS)/Current MP may request from the Current/Previous MP metering details using a PreInstallationRequest (defined in the B2B Procedure: Customer and Site Details Notification Process) after receiving the Metering Service Works Request but prior to going out to site to perform the work.

(i) This provides the New/Current MP with the additional metering information that may not be populated in MSATS (as some of the information is defined as Optional).

(d) Where a change in supply e.g. change in location of connection point, or increasing from single phase to 3-phase, a *ServiceOrderType* of 'Supply Service Works' and *SubType* 'Supply Alteration' is used.

(i) Where an arrangement exists between the DNSP and the MP, the DNSP may be able to complete all the work on-site. The MP is not required to attend on-site, but may need to perform some remote activities before the DNSP can provide a Response and closure of the Supply Alteration works.

(ii) Where a Supply Alteration involves associated metering changes, it is expected that the Initiator also raise the appropriate Metering Service Works Request.

(e) Where it is determined that the most efficient and effective way to complete the required works is to have multiple parties attend on-site at the same time, the works can be arranged by a 'coordinating party' (refer to section 5.1.3.1 Service Order Coordination for further details).

5.1.2.1. Example Process Flows – Meter Exchange

Figure 6 : A Meter Exchange sequence where the MP is not changing

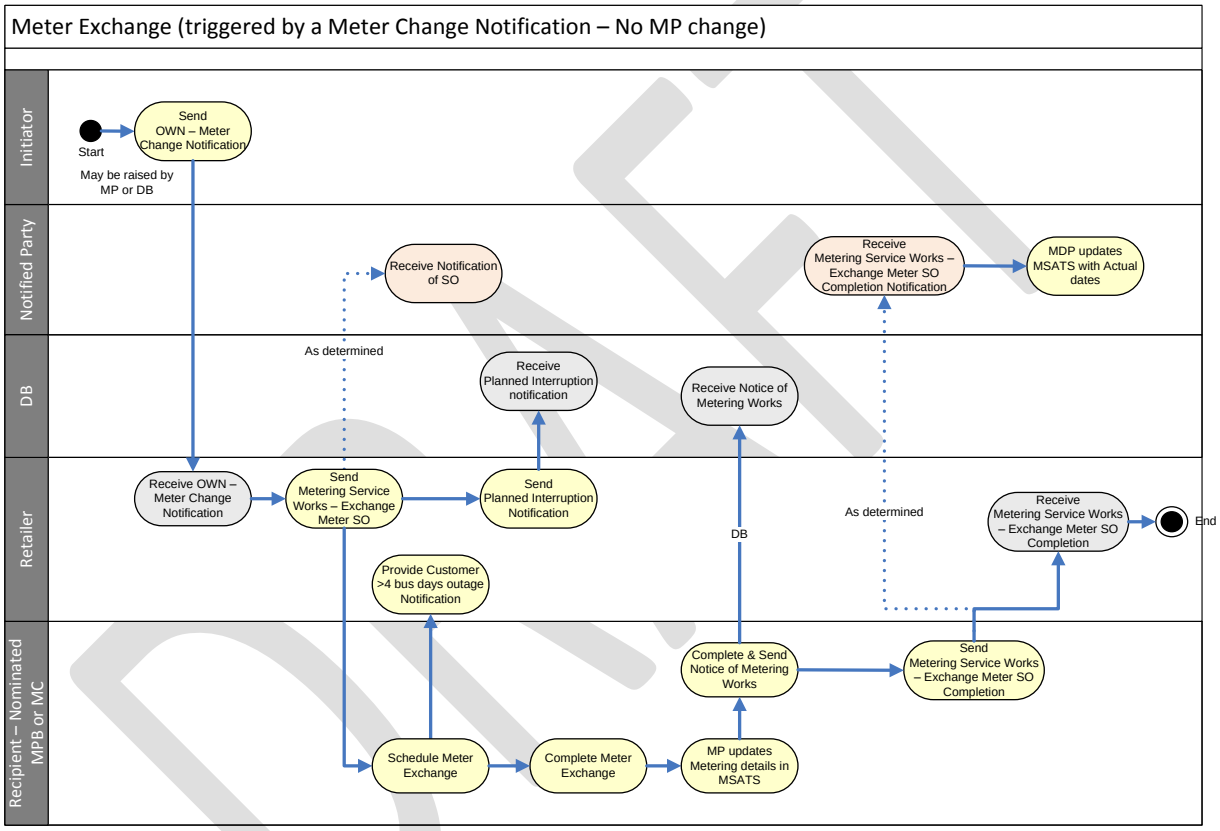
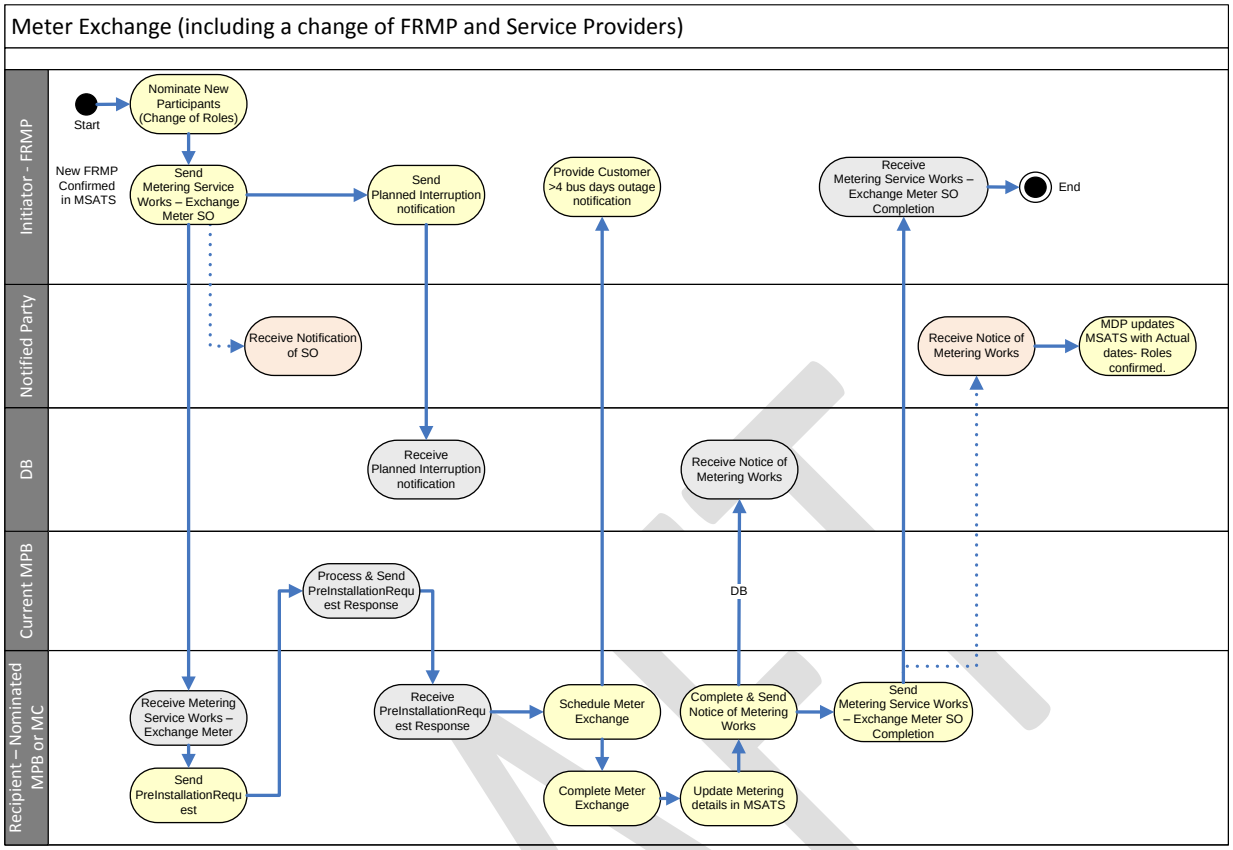


Figure 7 : A Meter Exchange process preceded by FRMP, MC, MDP, MP Role changes



5.1.3. Re-energisation & De-energisation

(a) Depending on the method requested by the Initiator, the Recipient of the De-energisation Request may be either the MC, MP, MDP or the DNSP.

(b) For a Re-energisation that accompanies a move-in (i.e. change of Retailer), the incoming Retailer may not be aware (or certain) of the method used previously to de-energise the site.

(i) Two statuses exist in MSATS, NMI Status (DNSP responsible for maintaining) and the Meter Register Status (MP responsible for maintaining). In most cases this information can be used to determine which party to send the re-energisation request to. However, where a de-energisation request is followed on the same day by a re-energisation request, MSATS may not be up-to-date. In those cases, the initiator will need to apply additional business rule logic to determine who to send the re-energisation request to.

(ii) The incoming Retailer will need to ensure that they have an arrangement with an MC that has an agreement with the Current MPB, otherwise they will need to nominate a New MC that does have such an arrangement prior to raising the re-energisation request.

(iii) In these scenarios the incoming Retailer may receive a rejection from the MC/MPB/MDP/DNSP they raise a request to, and will subsequently need to re-raise the re-energisation request to the MC/MPB/MDP/DNSP.

Figure 8 : Example De-Energisation Process

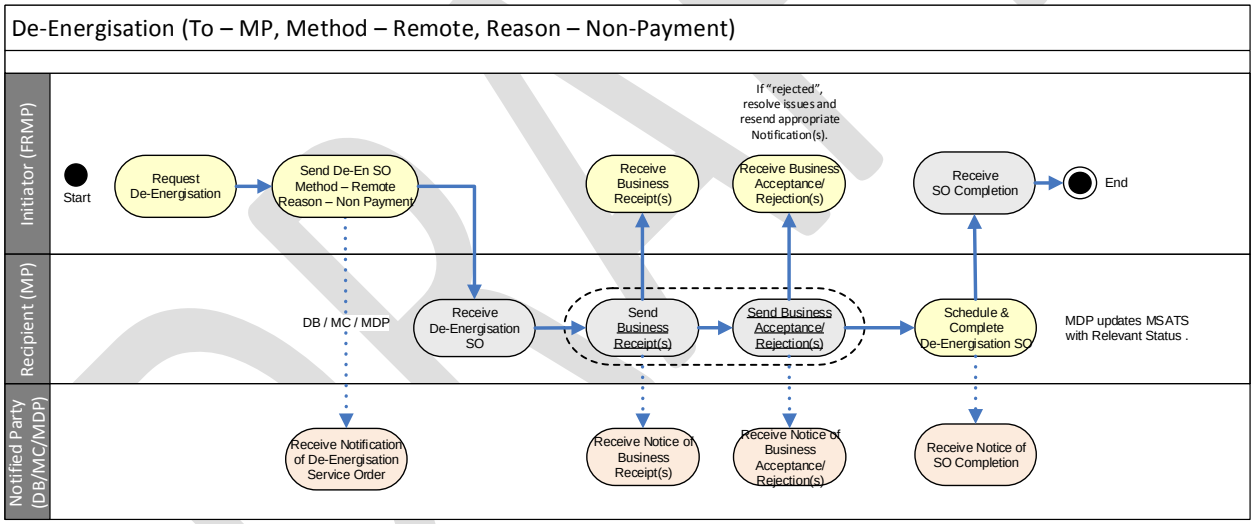
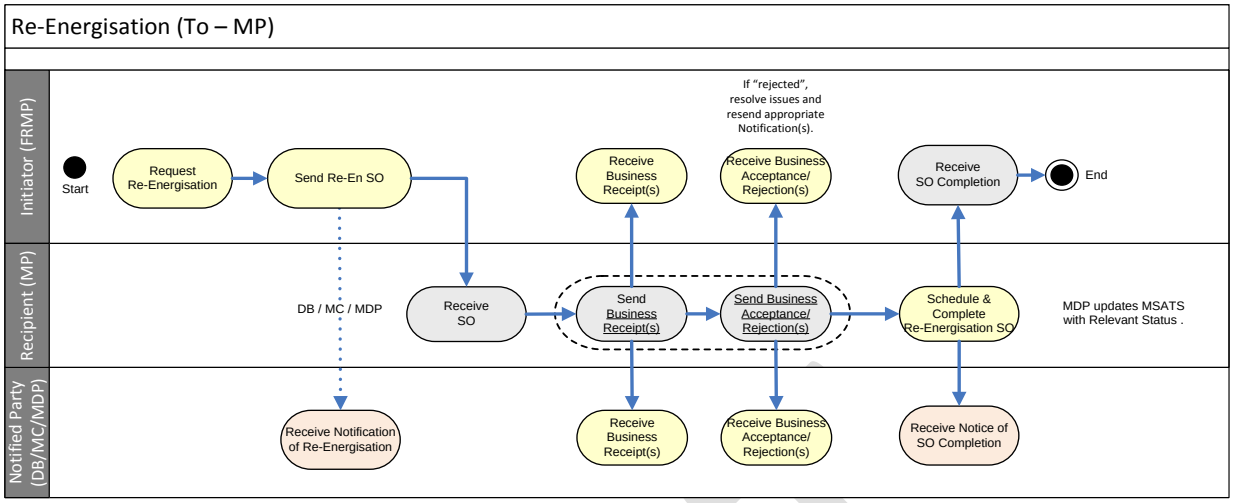


Figure 9 : Example Re-Energisation Process



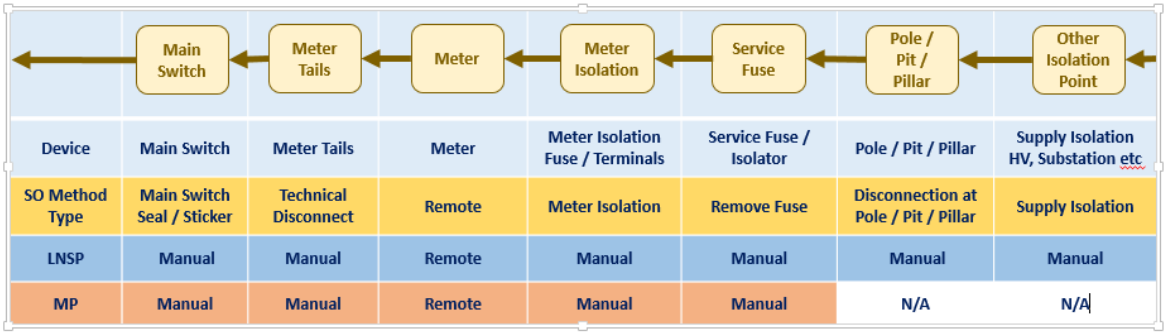
5.1.3.1. Change to De-energisation Service Order format

(a) One of the changes that has been made to the format for De-energisation Service Orders is to separate the de-energisation method from the de-energisation reason. This change is to allow participants to more accurately manage de-energisation requests, and the situations when they can and cannot be used.

5.1.3.2. De-Energisation Method

(a) There are now multiple service providers available to undertake customer de-energisation and different methods are available to different service provider. The diagram below shows which parties generally have access to which methods.

Figure 10 : De-Energisation Methods



Device	Main Switch	Meter Tails	Meter	Meter Isolation Fuse / Terminals	Service Fuse / Isolator	Pole / Pit / Pillar	Supply Isolation HV, Substation etc
SO Method Type	Main Switch Seal / Sticker	Technical Disconnect	Remote	Meter Isolation	Remove Fuse	Disconnection at Pole / Pit / Pillar	Supply Isolation
LNSP	Manual	Manual	Remote	Manual	Manual	Manual	Manual
MP	Manual	Manual	Remote	Manual	Manual	N/A	N/A

5.1.3.3. De-Energisation Reasons

(a) To ensure clarity of the reason for de-energisation and ensure that all de-energisation reasons which are covered by a *protected period* are clearly identified, additional de-energisation reasons have been added to the Service Order framework and have been matched to the protected period obligations within the NERR and Victorian Energy Retail Code.

The de-energisation reasons (and associated protected periods) are shown in Table 3 below.

Table 3 : B2B Service Order Types and Protected Periods

B2B Service Order De-energistation Reason	NERR De-Energisation Type	NERR Clause 116 Protected Period	VERC De-Energisation Type	VERC Clause 116 Protected Period
Non-Payment	Cl 111 - De-energisation for not paying bill	Cl 116 Applies	Cl 111 - De-energisation for not paying bill	Cl 116 Applies
Other (i.e. breach of contract / no security deposit)	Cl 112 - De-energisation for not paying security deposit		Cl 112 - De-energisation for not paying security deposit	
No Access	Cl 113 - De-energisation for denying access to meter		Cl 113 - De-energisation for denying access to meter	
Illegal Usage	Cl 114 - De-energisation for illegally using energy		Cl 114 - De-energisation for illegally using energy	
Unauthorised Usage	Cl 115 - De-energisation for non-notification by move-in or carry-over customers		Cl 115 - De-energisation for non-notification by move-in or carry-over customers	
Move Out[1]		Cl 116 Does Not Apply		Cl 116 Does Not Apply
Safety				
Defect				
Site Works				
Customer Requested				
[1]To be used when the customer has vacated the premises				

5.1.3.4. De-Energisation Summary

The combination of de-energisation methods and reasons are summarised in the table below:

Table 4 : Summary of De-Energisation Methods and Reasons

De-Energisation Method	De-Energisation Reason	Comment

• Supply Isolation
  • Disconnection at pole top, pillar box or pit Remove Fuse
  • Meter Isolation
  • Remote
  • Technical disconnect
• Main switch sticker / Seal
  • Recipient discretion
	• Non-Payment
	• Other (i.e. breach of contract / no security deposit)
	• No Access
	• Illegal Usage
	• Unauthorised Usage
		Protected Period Applies

De-Energisation Method	De-Energisation Reason	Comment
	• Move Out • Safety • Defect • Site Works • Customer Requested • Other	

(a) For example, a disconnection for Non-Payment might be undertaken by sending a Service Order to a Network as:

(1) Remove Fuse – Non Payment

(2) Meter Isolation – Non-Payment

(b) Similarly, a Move Out disconnection may be requested by:

(1) Remove Fuse – Move Out

(2) Remote – Move Out

5.1.4. Service Order Coordination

(a) For more complex Service Order scenarios where coordination is required to have more than one party on-site concurrently, the Initiator may nominate a 'coordinating party' by populating 'Yes' in *ServiceOrderCoordinationRequired* and providing the appropriate details in *CoordinatingContactName* and *CoordinatingContactTelephoneNumber* in the Service Order Request. This may be the REC, the MC, MP, DNSP or another party such as the body corporate for a multi-dwelling site.

(b) Some complex situations that require service order coordination between multiple parties include the following:

(i) High Voltage Injection – In a high voltage injection situation, there can be many meters that simultaneously fail as a result of the injection event. In such a case it is likely that the DNSP becomes the principle co-ordinating party for the resolution of the outage, and thus will be the party to initially advise the affected retailers of their responsibility with regard to the failed meters. In such a case it would be expected that the retailer includes the DNSP's emergency coordinator's contact details in the Service Order coordination fields of the Meter Exchange service orders that they issue to their Meter Providers.

(ii) Group Metering Isolation – In a situation where a metering works must occur at a connection that is part of a group metering setup (that is, one single isolation point for multiple customers), then a co-ordinating party must be identified who will take on the responsibility of advising all affected retailers or their customers prior to any site isolation taking place. This co-ordinating party in these cases will likely be the customer's REC or may be a representative of the Body Corporate if the site is an apartment complex.

(c) It is expected that the service provider will contact the 'coordinating party' nominated in the Service Order and negotiate an agreed time for the work to be scheduled. If not contacted within a reasonable timeframe, it is suggested that the 'coordinating party' follow-up with the responsible Retailer in the interest of minimising delays/impact to the End User.

(d) The Service Order Appointment Notification transaction was previously defined as used only in South Australia. Although South Australia has indicated that they will no longer be using this functionality, rather than disable an existing transaction it was decided that the Appointment Notification remain as part of the B2B Procedure v3.0 changes. Industry

may choose at a later date to either disable or modify the transaction depending on if/how it is used.

5.2. Customer and Site Details Notification

5.2.1. Customer Details Request

(a) The Customer Details Request can be initiated either by a DNSP or by an MP. The request is always directed to a Retailer who retains the master copy of this information as they are the principal contact point with the Customer. The DNSP or MPB, if they become aware of Life-support are to contact the Retailer by email and phone and advise the Retailer to update their records. In this way the Retailer is retained as the 'database of record' for this information.

5.2.2. Customer Details Notification

(a) The Customer Details Notification has been expanded to carry additional information around Life Support customers to facilitate Industry changes that have been requested for some time.

(b) The Customer Details Notification will be sent by the Retailer to both the DNSP and to the MP either as a result of the Retailer updating their records, or as a result of a Customer Details Request being sent from an MP or a DNSP to a Retailer.

5.2.3. Life Support

(a) The effective management of Life Support information becomes more complex with the introduction of the Metering Competition rule changes. In particular with the increase in on-market sites within embedded networks and the involvement of new participants that may need to obtain or share Life Support information.

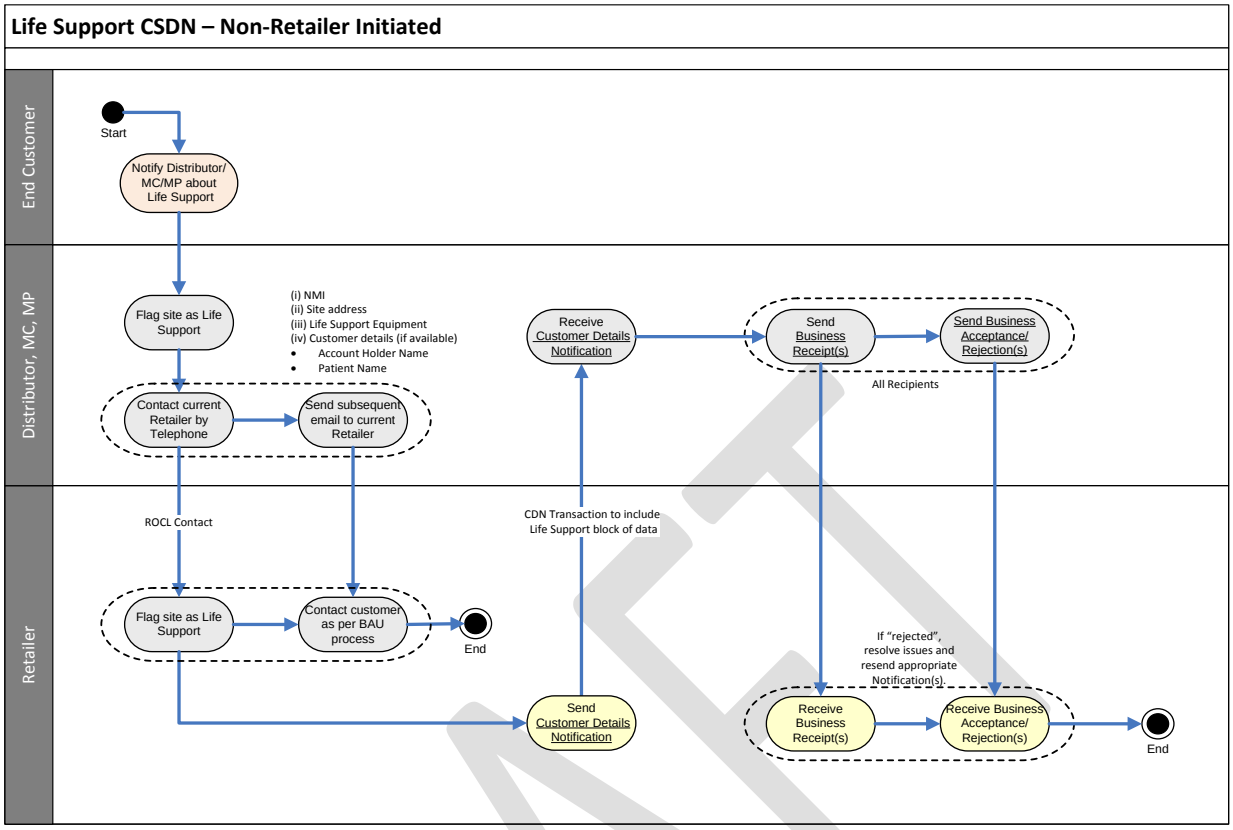
(b) To allow for improved management of Life Support information, including better identification of the situations when Life Support details can be cleared from system records, additional Life Support details can now be shared between participants which is intended to aid clarity and help reduce confusion and misinterpretation.

5.2.3.1. Example Process Flows involving Life Support data

CDN with life support Non-Retailer Initiated

(a) In the diagram below, a Life Support situation is identified by a party other than a Retailer. In this scenario the party who learns of this situation contacts the Retailer via email and phone. At that point the Retailer will update their records and then broadcast an update of the Life Support details to the DNSP and other parties as contractually agreed.

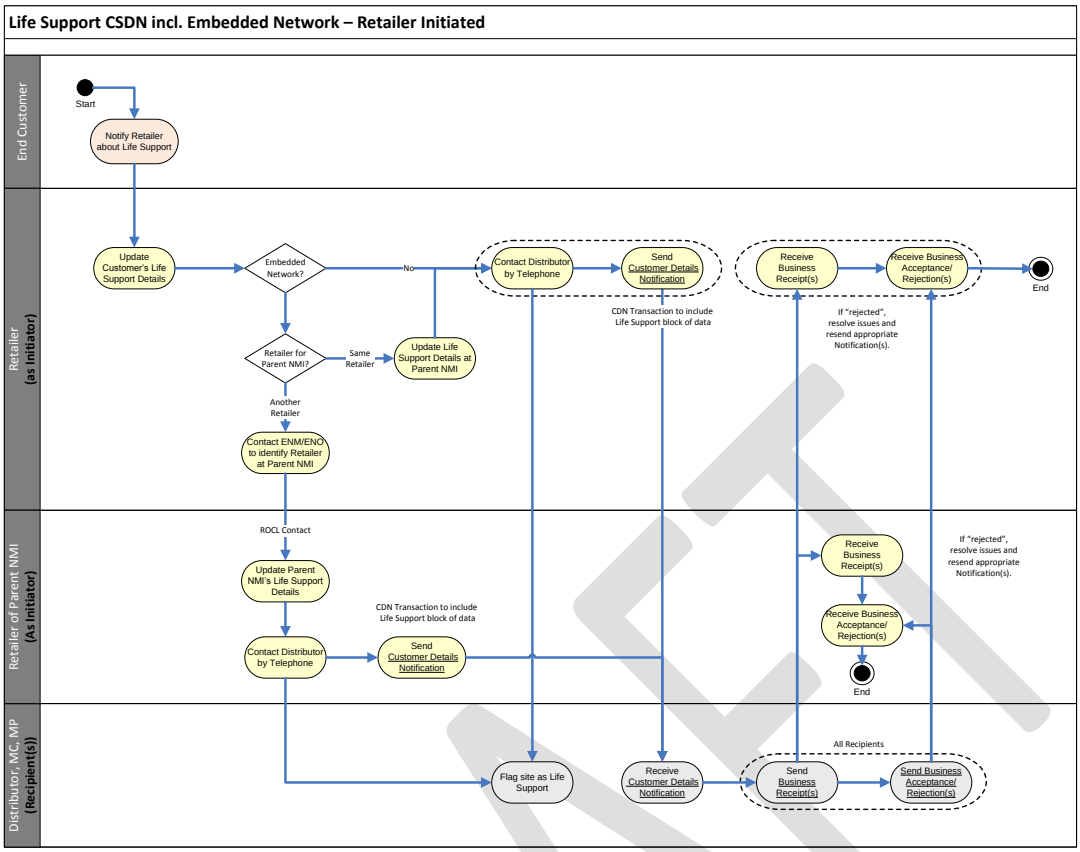
Figure 11 : Example Life Support CSDN process where DNSP, MC or MP initiates process



CDN with Life Support within an Embedded Network

(b) In the diagram below, a Life Support situation is communicated to Retailer by a Customer, but if that Customer resides in an Embedded Network, then extra steps are required to ensure that the Retailer and DNSP of the Parent NMI are also informed.

Figure 12 : Example Life-Support CSDN process involving and Embedded Network



5.2.4. Customer Details Reconciliation

(a) The Customer Details Reconciliation allows participants involved to request a snapshot of all NMIs, for which the Retailer is financially responsible, where the customer is flagged with Life Support at the time of the Reconciliation.

5.2.5. Site Access Request

(a) The Site Access Request is a new transaction intended to enable greater sharing of Hazard and Access Information between participants. Previously there was only a one way flow between Retailer and DNSP of the Site Access Notification. With the introduction of metering competition it is envisaged that there are scenarios where an MP may require Site Access information from another party and scenarios where a new Retailer, may wish to obtain current Site Access Information from a DNSP. As a result this request now allows for any current or nominated party to request the information of any other party.

(b) There will no longer be an official Database of record for Site Access Data.

5.2.6. Site Access Notification

(a) The Site Access Notification no longer remains a transaction that flows in one direction from a Retailer to a DNSP. A Site Access Notification will be provided by one party when they receive a request from another party.

(b) In future under normal circumstances when the Retailer updates their Hazard and Access details as a result of entering changes into their system during customer contact, they will automatically trigger a single Site Access Notification to the DNSP followed by a second single Site Access Notification to an MP. In this way the DNSP and the MP receive their updates sequentially.

(c) In order to avoid a race condition where the Retailer, DNSP and the MP receive updates from one party which triggers updates to other parties and so on in an endless cycle, certain rules must be followed.

(d) Rules for Site Access Notifications.

(i) Only the Retailer will issue a Site Access Notification pre-emptively (That is without being requested to).

(ii) The Retailer will only issue a pre-emptive Site Access Notification after updating their Hazard and Access details via their user interface. They must not issue a Site Access Notification after updating their systems with data from a Site Access notification they themselves have received.

(iii) The DNSP and the MP will only ever issue a Site Access Notification to a participant after the receipt of a Site Access Notification Request.

(e) No participant is obliged to update or overwrite their own copy of Site Access Data on the basis of receiving a Site Access Notification.

(f) Each participant must decide what data they choose to share when publishing a Site Access Notification, with the expectation that the published data should ideally be helpful and usable by the receiving party.

5.2.7. Pre-Installation Request/Response

(a) The Pre-Installation Request/Response is intended to facilitate the requirement under the rules for a new MP to obtain existing site and metering installation configuration information from a Current MP under the rules.

(b) The request transaction is always one way from a New MP to a Current MP

(c) The response transaction flows in reverse from Current MP to New MP.

5.3. One Way Notification

(a) One way notifications are a means of providing another participant with one or more lines of information in a simple transaction.

5.3.1. Pre-Defined Transactions

(a) The B2B procedures currently identify a number of transactions which have been used and are deemed useful. These transactions have been predefined and are as follows:

5.3.1.1. Meter Exchange Notification (MXN)

(a) This transaction is designed for use during mass meter rollout.

5.3.1.2. Network Tariff Notification (NTN)

(a) This transaction retains its purpose of being a means for a DNSP to notify a Retailer of an intention to change the Network tariff associated with one or more connection points.

5.3.1.3. Planned Interruption Notification (PIN)

(a) This planned interruption notification is intended to facilitate the requirement under the rules for a Retailer to advise a DNSP about a planned outage they wish to perform. This transaction is always in one direction from a Retailer to a DNSP

5.3.1.4. Meter Fault and Issue Notification (MFN)

(a) This Meter Fault and Issue Notification is intended to facilitate the requirement under the rules for an existing MP, MC or DB to advise a Retailer when a meter becomes non-compliant. That is it is failing to perform it function as a meter, or is exceeding its agreed specifications under metrology procedures and therefore the Retailer will need to arrange for a replacement. This transaction is always one way from an MP ,MC or a DNSP to a Retailer.

5.3.1.5. Notice of Metering Works (NMW)

(a) The Notice of Metering Works is sent from an MP to a DNSP after a Meter Exchange, Installation or Removal has taken place. The Notice of Metering Works has provision for sending and receiving information about the meters that have been installed, any meters that have been removed, and allows for the capture of meter readings from any manually read accumulation meters removed from site.

5.4. Meter Data Process

5.4.1. Provide Meter Data

(a) The Provide Meter Data transaction continues to perform the same function. With Retailers and DNSPs using it to request that an MDP provides validated meter data

5.4.2. Verify Meter Data

(a) The Verify Meter Data transaction continues to perform the same function. With Retailers and DNSPs using it to request that an MDP investigate the reason why meter data is not being received as expected.

5.4.3. Metering Installation Inquiry Request/Response

(a) Two new transactions are proposed to meet the Rules obligation to provide a B2B transaction to facilitate the Meter Installation Inquiry in the Minimum Services Specification as defined in the NER Table S7.5.1.1.

(b) These transactions are in the form of a request to an MP followed by an asynchronous response to the requester containing the requested data set.

5.4.4. Remote On-Demand Meter Read

(a) This transaction meets the Rules obligation to provide a B2B transaction to facilitate the Remote On-Demand Meter Read in the Minimum Services Specification as defined in the NER Table S7.5.1.1.

(b) This transaction is of the form of a request to the MDP, with the requested validated Meter Data being returned to the Initiator via a Meter Data Notification.

6. BUSINESS PRACTICES

(a) This section contains a range of common business practices and other process requirements that have been migrated from the Procedures to the B2B Guide because it is anticipated that they may impose obligations on parties who must only be subject to commercial arrangements and cannot be subject to binding obligations in B2B procedures.

6.1. Service Order Process

6.1.1. General Principles

(a) The Recipient should use reasonable endeavours to meet the original Timing Requirement for the completion of requested work that was inappropriately rejected.

(b) On accepting the ServiceOrderRequest, the Recipient is expected to use reasonable endeavours to complete the work within the Required Timeframe for the Completion of the Requested Work.

6.1.2. Raising a ServiceOrderRequest

(a) To indicate a new Request, the ServiceOrderRequest should specify the *ActionType* as “New”.

6.1.3. Acknowledging Receipt of the ServiceOrderRequest

(a) An Initiator should to be aware that a Recipient may reject all De-energisation, Supply Service Works with *ServiceOrderSubType* of “Supply Abolishment” and Miscellaneous Services ServiceOrderRequests where the Initiator is not a Current Participant for a Site. The *BusinessAcceptance/Rejection* will use an *EventCode* indicating “Initiator Is Not Permitted to Raise This Service Order Type”.

6.1.4. Actioning the ServiceOrderRequest

(a) The Recipient of the ServiceOrderRequest is expected to schedule and use reasonable endeavours to complete the work, taking into account any *SpecialInstructions* and *Appointment* details contained in the ServiceOrderRequest.

(b) Note: the limitation of the *ScheduledDate* in the Procedures to no more than 100 calendar days in the future likely relates to the 65 prospective days allowed in MSATS for a prospective change. This is listed here as calendar days as B2B works on local timings, whereas MSATS uses the NEM calendar.

6.1.4.1. Raising a ServiceOrderResponse

(a) Where the Recipient does not receive a *BusinessReceipt* or *BusinessAcceptance/Rejection* from the Initiator after sending the ServiceOrderResponse, the Recipient may investigate the failure of the delivery and notify the Initiator. If the Initiator reasonably considers that delivery failure lies with the Recipient, the Recipient may resend the original ServiceOrderResponse, as appropriate.

6.1.4.2. Use of Status, Exception and Product Codes in ServiceOrderResponses

(a) The *ProductCodes* for each DNSP are published on various websites for each of jurisdiction. At the time of publication these are:

(i) The Victorian DNSP Product Codes are published on the Essential Services Commission website: http://www.esc.vic.gov.au

(ii) The ACT, NSW, SA and Queensland codes are as published by each DNSP.

(b) *ProductCodes* for Meter Providers are provided through the contract between parties. General *ProductCodes* and descriptions may be published on the respective Meter Provider websites.

(c) Specific requirements are expected to apply to the use of the “Cost TBA” code as follows:

(i) The *ProductCode* “Cost TBA” should not be used for Re-energisation, De-energisation and Special Read ServiceOrderRequests; and

(ii) The *ProductCode* “Cost TBA” should only be used when the Recipient needs to do further investigation to determine what work was attempted or completed at the Site. This *ProductCode* must not be used as a default.

6.1.5. Closing the Service Order Process

(a) If the Initiator has rejected the ServiceOrderResponse (with a negative *BusinessAcceptance/Rejection*), it is expected that the Recipient and the Initiator negotiate a resolution of the situation, with the agreed resolution being reflected in each party’s systems.

6.1.6. Works Scheduling

(a) The Service Provider must use the *ServiceOrderType, ScheduledDate* and the *CustomerPreferredDateAndTime* fields to determine when the work should be scheduled and completed.

6.1.7. Cancelling a ServiceOrderRequest

(a) Charges consistent with the allowed *ProductCodes* may apply for any cancelled ServiceOrderRequest.

6.1.8. Common Business Practices

6.1.8.1. General

(a) **MSATS Relationship** - MSATS batch updates each night with the previous days Change Requests. As such, it may not have the most current information. Therefore, an MSATS transaction does not remove the need for a Service Order.

For example, where the prospective transfer is to take place on a Special Read, the Retailer must raise a Special Read ServiceOrderRequest to the appropriate Service Provider.

(b) **Service Time**

(i) *ServiceTime* is used to inform the Recipient when the work can be performed, and it also indicates what charges the Initiator is willing to accept.

(ii) For work the Initiator requests only to be undertaken outside Business Hours:

(A) The Initiator should specify a *ServiceTime* of "Non-Business Hours" and ensure the information in the *SpecialInstructions* field provides additional and specific information regarding the detail and reason for the “Non-Business Hours” request.

(B) The Recipient should take into account the value in the *ServiceTime* field when scheduling the ServiceOrderRequest.

(C) Indicates that the Initiator will accept any “Non-Business Hours” charges.

(iii) Where the Initiator does not wish to pay an after-hours fee a *ServiceTime* of “Business Hours” should be used. This indicates that the Initiator will not accept after-hours charges and will accept a delay in service completion (within the bounds of agreed service levels) in preference to undertaking the work after-hours.

(iv) Where the Initiator prefers the work to be undertaken within business hours but is willing to pay the after-hours fee where necessary in order to speed up completion, a *ServiceTime* of "Any Time" should be used. This indicates that the Initiator will accept after-hours charges if the work needs to be undertaken outside Business Hours.

(c) **Meter Reading Date** – Where a meter reading is associated with a Service Order, the Recipient should ensure that the meter reading date provided via the MDFF file aligns with the date the Service Order was completed (*ActualDateAndTime)*.

(d) **Customer Details** – Where Customer Details (name and telephone number) are required for the completion of a ServiceOrderRequest, these should be provided using the Customer's contact details fields (*CustomerContactName*, *CustomerContactTelephoneNumber*).

It is anticipated that this information will not be used to permanently update the Recipient's customer-related records. Any permanent updates to Customer Details are sent from the Retailer to the MC, MPB and DNSP in a CustomerDetailsNotification. The Customer and contact information provided in a ServiceOrderRequest should only be used for the completion of the identified work.

(e) **Site Details** – The Initiator should ask the Customer if there are any Hazards or Access Requirements prior to initiating a ServiceOrderRequest. Where the Customer reports no Hazards or Access requirements the Initiator is expected to indicate this using the appropriate values in the ServiceOrderRequest. This information should be used for the completion of the identified work only.

(i) If the Customer has supplied any special access details, the Initiator is expected to include these in *AccessDetails*. These details exclude the hazards covered by the *HazardDescription* field.

(A) Where the Customer reports no access requirements, the Initiator should indicate this by using the value "Customer Reports No Access Requirements" in the *AccessDetails* field.

(B) Any permanent updates to access or hazard details should be sent from the Initiator to the Recipient in a SiteAccessNotification.

(f) **Read all meters**

(i) Where the Recipient reads the meter as part of completing the ServiceOrderRequest, the Recipient is expected to use reasonable endeavours to read all meters at the NMI. Excluding ServiceOrderRequests that are Not Completed, where an actual meter reading is not taken, a substitution meter reading must be provided.

(g) **Meter Serial Number**

(i) *MeterSerialNumber* is required where work is specific to a meter. The Initiator should provide the *MeterSerialNumber* if it is available. A Recipient will reconcile the *NMI* / *MeterSerialNumber* combination(s) against information held in their records, and thereby help confirm the correct site will be visited for the Service as early in the process as possible. If the requested work affects all meters, the Initiator does not have to provide any meter serial numbers.

(ii) Where the Recipient identifies a discrepancy between a *NMI* and the *MeterSerialNumber* the Recipient should progress the ServiceOrderRequest if it believes the discrepancy relates to its own data. If it believes the discrepancy relates to the *MeterSerialNumber* provided by the Initiator, the Recipient should Reject the ServiceOrderRequest except for High Priority Service Orders, where the Recipient should contact the Initiator and agree how to resolve the discrepancy. If the ServiceOrderRequest is Rejected, the Recipient must provide the *MeterSerialNumber(s)* in the *Explanation* field associated with the appropriate *EventCode* ("Invalid data. Details provided in *Explanation*").

(h) **ProposedTariff field**

(i) The Recipient must not reject the ServiceOrderRequest if the *ProposedTariff* value is wrong or does not suit the Site's metering. The MSATS notification will provide the details of the tariff(s) actually allocated to the Site.

(i) **Other rules**

(i) The Recipient may seek to recover costs for any actioned work from the Initiator who requested that work that was completed or attempted.

(ii) An Initiator is expected to use reasonable endeavours to send ServiceOrderRequests as they arise and not to bundle them and send them in a batch.

6.1.8.2. Service Paperwork

(a) Examples of alternative, agreed methods to reference the Service Order Number when providing Service Paperwork are:

(i) When Faxed - the Service Order number is to be clearly displayed at the top right hand corner of the Service Paperwork;

(ii) When Emailed - the Service Order number is to be clearly displayed in the subject line of the email;

(iii) When using Online systems - as agreed by the users of the online system;

(iv) When provided by transaction – as agreed by the users of the transaction;

(v) When left 'On-Site' – the Service Order number is not required. In this case, even if the Retailer is provided with a copy of the Service Paperwork by the DNSP or MP, the Retailer is not required to provide a copy of the Service Paperwork back to the DNSP or MP when raising a Service Order.

(b) Upon receipt of the ServiceOrderRequest that requires Service Paperwork to be provided by the Retailer, the Service Provider must:

(i) not reject the ServiceOrderRequest on the basis of missing paperwork

(ii) where the necessary Service Paperwork has not been received, wait at least 1 hour to receive Service Paperwork prior to providing a Business Signal of *BusinessAcceptance/Rejection*

(iii) Note: The Service Provider can send a *BusinessAcceptance/Rejection* at any time within the hour when the paperwork is received (and reconciled to the Service Order) or is not required.

(iv) within the timeframes permitted for the *BusinessAcceptance/Rejection* and after 1 hour, where all necessary Service Paperwork has not been received and the Service Provider wishes to accept the ServiceOrderRequest, respond with a severity "Warning" with a Business Event of 'Documentation required'

(c) Service Paperwork must be provided in Victoria for sites that have been physically de-energised for more than 12 months.

(d) In those jurisdiction where safety certificate paperwork is required for both the customer's premise and the metering installation, then the Initiator must ensure that there is a reference to both the customer and the metering safety certificate paperwork in the Supply Service Works Service Order, unless the safety certificates are to be left on-site in which case they should be identified as 'on-site' in the Supply Service Works service order

6.1.8.3. Allocate NMI – NSW

(a) As the DNSP does not do the actual connection work in NSW, the DSNP will only receive a Supply Service Works - Allocate NMI Service Order to facilitate the New Connection process. The MP will however receive a Metering Service Works – Install Meter Service Order as part of the overall process. Refer to Figure 2 : Proposed New Connection Sequence - NSW for more information.

(b) The Retailer must provide the NMI to the Customer, or Accredited Service Provider (ASP) or builder, with a request that the NMI is included on relevant electrical works forms. These forms include the Notification of Additional Load, the Application for Connection (AFC), and the Notice

of Service Work (NOSW). If the NMI is not provided on the NOSW form, the DNSP will reject the NOSW.

6.1.8.4. Allocate NMI – Other Jurisdictions

(a) The use of a Supply Service Works Service Order with a sub-type of Allocate NMI is always the first step in an overall B2B New Connection process.

(b) This Service Order type has Service Paperwork requirements in some jurisdictions.

(c) Typically an Electrical Works Request (EWR) or a Form A in South Australia is required as one of the key items of paperwork to be provided by a Retailer to the DNSP prior to NMI Allocation

(d) Under most circumstances it is expected that the Customer's Safety Certificate is also provided at the Allocate NMI stage, however the option exists for a Retailer to supply that document with the subsequent Supply Service Works Service Order to establish a type of supply.

(e) If the Recipient considers the requested metering configuration is incorrect, the Recipient may advise the Initiator of this using a *BusinessAcceptance/Rejection* transaction.

6.1.8.5. Completing the New Connection – Other Jurisdictions

(a) To complete the New Connection, the Retailer will be required to initiate a Metering Service Works – Install Meter Service Order to the MPB. If the MPB installs a metering configuration different from that requested by the Initiator, the MPB should advise the Initiator of the metering configuration and the reason for it in the *SpecialNotes* field of the ServiceOrderResponse.

(b) To complete the New Connection, the Retailer will also be required to initiate a Supply Service Works Service Order with the applicable establish sub type to the DNSP. In those jurisdictions requiring Metering Installation Safety Certificate paperwork to be provided prior to the establishment of supply, the Safety Certificate ID should be provided with the Service Order or alternatively an indication that the safety certificate will be left on-site must be given.

(c) An Initiator should use the *SpecialInstructions* field in the subsequent Metering Service Works Service Orders to an MP or Supply Service Works Service Orders to a DNSP to advise the Recipient of any specific tariff or metering requirements that are not already provided.

6.1.8.6. Meter Reconfiguration

(a) The Initiator must specify the required configuration in the *SpecialInstructions* field of the ServiceOrderRequest.

6.1.8.7. Metering Service Works

(a) The Initiator must use the *ProposedTariff* field to advise the Recipient of any specific tariff that the Initiator requires. The *SpecialInstructions* field should provide additional information, such as metering requirements or any other special requirements.

(b) If the Recipient considers the requested metering configuration is incorrect, the Recipient may advise the Retailer of this using a *BusinessAcceptance/Rejection* transaction.

(c) If the Recipient installs a metering configuration different from that requested by the Retailer, the Recipient must advise the Retailer of the metering configuration and the reason for it in the *SpecialNotes* field of the ServiceOrderResponse.

6.1.8.8. Meter Reconfiguration

(a) A Meter Reconfiguration request is a sub-type of a Metering Service Works Service Order. The Initiator should specify the required configuration in the *SpecialInstructions* field of the ServiceOrderRequest.

6.1.8.9. Supply Service Works

(a) The Initiator and Recipient must ensure that all necessary paperwork is available and completed in order to progress and complete a Supply Service Works Service Order where the Customer's connection is to be changed. This Service Order type has Service Paperwork requirements in some jurisdictions. The Supply Service Works – Service Order Sub Types that will require paperwork include:

(i) Supply Service Works – Allocate NMI

(ii) Supply Service Works – Supply Abolishment

(iii) Supply Service Works – Supply Alternation

(iv) Supply Service Works – Establish Temporary

(v) Supply Service Works – Establish Temporary in Permanent

(vi) Supply Service Works – Establish Permanent

(b) A Supply Service Works Service Order may be sent by the Retailer to the DNSP at the same time as the Metering Service Works Request is sent to the MPB. In that situation Safety Certificate paperwork for the Metering Installation will not be created at the time that the Supply Works Request is sent. In those jurisdictions requiring paperwork, the Metering Safety Certificate should be marked in the Service Order as being available On-Site.

6.1.8.10. Miscellaneous

(a) Participants should not use this Service Order type for Standing Data enquiries. This includes seeking confirmation and clarification of address details, tariff details, Site network relationship details such as DLF & TNI, meter details, etc.

6.2. CUSTOMER & SITE DETAILS PROCESS

6.2.1. Common Business Rules for Notifications

(a) If Participants agree that the Customer Details Notification is the agreed type of Notification method for communicating:

(i) outage contact details and/or

(ii) Life Support contact details

then a Retailer must initiate a CustomerDetailsNotification if it becomes aware of changes to End User outage, or Life Support details. This could be sent to one or more Recipients.

6.2.2. Customer Details Request

(a) A participant may initiate a CustomerDetailsRequest transaction in order to obtain the most up-to-date Customer Details and Life Support information from a Retailer

6.2.3. Customer Details Notification

6.2.3.1. Initiating a Customer Details Notification

(a) The Retailer is expected to use reasonable endeavours to send the CustomerDetailsNotification in the following situations:

(i) At completion of transfer, or;

(ii) At completion of an Allocate NMI where the customer details and access requirements are assigned to the new NMI, or;

(iii) When the customer moves out or moves in, or

(iv) Upon receipt of routine updates provided by the existing customer.

(b) If a Customer changes Retailer, the Old Retailer should not send a CustomerDetailsNotification

6.2.4. Customer Details Reconciliation

(a) The CustomerDetailsReconciliation provides Recipients with a snapshot of all NMIs, for which the Retailer is financially responsible, where the customer is flagged with Life Support at the time of the Reconciliation.

(b) The use of *BusinessAcceptance/Rejections* for the CustomerDetailsReconciliation will be a subset to that used for the CustomerDetailsNotification.

(c) The Recipient can only reject for reasons as specified in section 5.5.1 of the B2B Procedure: Customer and Site Details Notification Process. If the DNSP finds an issue with the customer data other than the Life Support flag provided in the CustomerDetailsReconciliation, the Recipient should use the CustomerDetailsRequest process in accordance with the B2B Procedure: Customer and Site Details Notification Process.

(d) The Participants should agree the timing of the Customer Details Reconciliation. This agreement should consider criteria such as:

(i) conflicting scheduled reconciliations with other Participants;

(ii) IT support availability; and

(iii) other impacting activities.

6.3. One Way Notifications

6.3.1. Process Overview

(a) The One Way Notification process enables Participants to send information or messages to other Participants in a single transaction for multiple NMIs.

(b) The process is designed to allow flexibility to add additional new message types within the Business Document without an aseXML Schema change, by incorporating the data in CSV format within the transaction.

(c) There is one Business Document associated with this overall process: OneWayNotification - the provision of selected information between Participants.

6.3.2. Meter Exchange Notification (MXN)

(a) This transaction forms the communication method for an Initiator to notify a Recipient of planned meter exchanges under a Mass Meter Exchange (roll out) Program. .

(b) For this process the definition of "Mass Meter Exchange Program" shall mean the mass roll out of a "smart meter replacement program", initiated by a Participant or mandated by jurisdictional or national regulatory instruments.

(c) During a Mass Meter Exchange Program the Initiator should raise a *OneWayNotification* (MXN), for each impacted current Participant affected, each time a new customer notification is sent.

(d) During a Mass Meter Exchange Program the Initiator is expected to take reasonable endeavours to include multiple MXN records in OneWayNotification transactions.

(e) A Participant may initiate the Meter Exchange Notification (MXN) for;

(i) individual meters,

(ii) small numbers of meter exchanges,

(iii) large number of meter exchanges; and

(iv) pilots & trials that are not part of a Mass Meter Exchange Program

(f) It is reasonably expected that where a Participant initiates a meter exchange program in e(iii) and e(iv) above, that it will engage with affected Participants to determine impacts and agree whether the use of *OneWayNotification* (MXN) is appropriate.

(g) The MPB is not obliged to complete the meter exchange during the notification dates provided to the Recipient.

(h) If the MPB fails to complete the meter replacement between the notification dates, and consequently provides the customer with a new notification, a new *OneWayNotification* (MXN) transaction should be sent to the affected Participants.

(i) For the advance notification to be useful, the Initiator should send the *OneWayNotification* (MXN) transaction at least four days prior to commencing any meter exchange.

(j) The MPB may negotiate a different period with the customer outside the notification dates and not notify the affected Participants.

(k) The Initiator is only expected to notify the current Participant for a given Role as defined by MSATS at the time the Meter Exchange Notification (MXN) is created.

(l) Notifications of successful meter exchanges are communicated via the existing MSATS Change Request process.

(m) Recipients may receive more than one *OneWayNotification* (MXN) per day from the same Initiator.

6.3.3. Network Tariff Notification (NTN)

(a) It is expected that the Network Tariff in the NTN transaction will match the MSATS Change Request notification for Network Tariff change.

(b) This transaction is the communication method typically used for DNSPs and MPBs to notify Retailers and/or MCs of planned network tariff changes in advance of the network tariff change taking effect.

(c) For this process the "Network Tariff Notification" shall mean the notification of a Network Tariff change for a customer or groups of customers, from a:

  (i) DNSP or MPB to the Current Retailer (FRMP) and/or MC in advance of when the Initiator intends to change the Network Tariff.

  (ii) Retailer or MC to the DNSP and MPB to propose Network Tariff changes.

(d) For a Network Tariff Notification initiated by the Retailer or MC:

  (i) Where a meter reconfiguration is required to facilitate the change in Network Tariff (and assuming the DNSP has no objections to the new Network Tariff proposed), the MPB should request the Initiator to send through a Metering Service Works Request for each NMI to be updated, and the corresponding Network Tariff populated in the Request.

  (ii) Where no metering changes are required, it is reasonable to expect that the DNSP will make the corresponding update to the Network Tariff in MSATS, provided that the DNSP accepts the proposed Network Tariff provided.

(e) For DNSP or MPB initiated Network Tariff changes, where advanced notification to the Current Retailer is required by jurisdictional instruments, they should raise a *OneWayNotification* (NTN) for each impacted Current Retailer.

(f) The Initiator is expected to provide all network tariffs applicable for the NMI as at the proposed change date in the *OneWayNotification* (NTN).

(g) When initiating advanced notification of Network Tariff changes, the Initiator is expected to take reasonable endeavors to include multiple NTN records in the *OneWayNotification* (NTN).

(h) Where an Initiator intends to initiate a Network Tariff Notification and a jurisdictional obligation does not exist, the Initiator is expected to engage and establish an agreement with impacted market Participants before any *OneWayNotification* (NTN) are raised.

(i) To provide sufficient forward-notice, the Initiator should produce the *OneWayNotification* (NTN) a minimum of thirty business days before the Network Tariff change becomes effective.

(j) Where the *OneWayNotification* (NTN) is initiated by the DNSP or MPB:

  (i) They are not obliged to complete the Network Tariff change on the proposed dates provided to the Retailer.

  (ii) They are not required to notify the Retailer if a planned Network Tariff change did not occur.

(k) If the DNSP or MPB fails to complete the Network Tariff change on the NOTICEENDDATE and consequently re-schedules the Network Tariff change, a new *OneWayNotification* (NTN) transaction shall be sent to the Retailer and/or MC.

(l) The DNSP or MPB is only required to notify the current Retailer as defined by MSATS at the time the Network Tariff Notification (NTN) is created.

(m) If a prospective Retailer exists either at the time of creating or post the creation of the *OneWayNotification* (NTN) transaction, there is no requirement for the DNSP or MPB to also notify the prospective Retailer.

(n) Notifications of successful Network Tariff changes are communicated via the existing MSATS Change Request process.

(o) Recipients may receive more than one *OneWayNotification* (NTN) per day from the same Initiator.

(p) Any Network Tariff change is effective from the MSATS change request effective date.

(q) The network tariff must be an approved and published Network Tariff before it can be used in the Network Tariff Notification.

6.4. Planned Interruption Notification (PIN)

(a) For this process the "Planned Interruption Notification" shall mean the notification of a Retailer initiated planned interruption for an End User from the Current Retailer (FRMP) in advance of when the interruption is scheduled.

(b) The Initiator must provide the start and end dates applicable for the NMI(s).

(c) If an agreement has been set up to provide a window for the start and end date, that window will be an agreed timeframe between the parties.

(d) The Initiator must provide time and duration of the Planned Interruption.

(e) When Initiating advanced notification of planned interruption, the initiator may include multiple PIN records in OneWayNotification transactions.

(f) The Initiator must produce the OneWayNotification (PIN) transaction a minimum of four business days before the Planned Interruption is scheduled.

(g) The Initiator is not obliged to perform the Planned Interruption on the proposed dates provided to the Recipient.

(h) The Initiator is not required to notify the Recipient if a Planned Interruption did not occur.

(i) Recipients may receive more than one OneWayNotification (PIN) per day from the same Initiator.

6.5. Meter Fault and Issue Notification (MFN)

(a) For this process the "Meter Fault and Issue Notification" shall mean the notification of a faulty meter or family of meters to the Current Retailer (FRMP) to enable them to arrange for the meter(s) to be replaced, or notification of a meter or meters that have exceeded the allowable consumption threshold for their given jurisdiction.

(b) The Recipient must appoint a contestable Metering Co-ordinator when the Initiator of the notification is the Initial Metering Co-ordinator.

(c) Provided the Recipient of the notice is correct for the given NMI/s, it is expected that action will be taken to initiate the replacement the meter/s for the NMIs identified in the notice.

(d) The Initiator will advise whether the End User's premise has supply or not.

(e) The Initiator will advise the reason they have determined why the meter is faulty.

6.6. Notice of Metering Works (NMW)

(a) The NMW is typically provided to the DNSP shortly after metering works are completed, and provides advance notice of metering changes prior to the appropriate Change Request being raised and affected in MSATS. Where there is any discrepancy between the information in the NMW and metering installation details updated in MSATS, MSATS is considered the database of record.

6.7. Meter Data Process

6.7.1. Provide Meter Data

(a) Worked example for Accumulation Meters:

MDFF content provided in response to a request for MDFF data for the period 1 January to 15 April

Start date	End date	Start read	End read	Consumption
1 Dec	1 Feb	0	100	100
1 Feb	1 Mar	100	200	100
1 Mar	1 Apr	200	300	100

(b) If the MDP has the MDFF Data which is the subject of a ProvideMeterDataRequest, they should send a MeterDataNotification transaction containing a MDFF file with the requested data to the relevant Participant. If the MDP is unable to provide the MDFF Data the subject of a ProvideMeterDataRequest, or the MDFF Data to which the MDP has access and wishes to provide to the Participant does not exactly correlate to the subject of the ProvideMeterDataRequest, the associated *BusinessAcceptance/Rejection* transaction for the ProvideMeterDataRequest should contain a relevant *EventCode* to explain the situation.

(c) MDPs may provide multiple MeterDataNotifications in response to a single ProvideMeterDataRequest.

(d) A Participant must use reasonable endeavours to ensure that the MDFF Data they are requesting is only for a period where they have a relevant Participant Relationship with the NMI.

6.7.2. Verify Meter Data

(a) A VerifyMeterDataRequest transaction does not replace a Special Read ServiceOrderRequest. If a Participant requires a site visit the Participant should raise a Special Read ServiceOrderRequest.

(b) MDPs may provide multiple MeterDataNotifications in response to a single VerifyMeterDataRequest.

(c) A Participant is expected to ensure that the MDFF Data they are querying is only for a period where they have a relevant Participant Relationship with the NMI.

Appendix 1 – Service Order Paperwork Reference Table

To the extent of any inconsistency between this reference table and any relevant Jurisdictional instrument, the relevant Jurisdictional instrument shall prevail to the extent of the inconsistency.

The documents listed in the table below are a collation of existing industry obligations. This table does not create new obligations.

Service Order Type/SubType	***Description***	***Form Reference Allowed Values****
Supply Service Works - Establish Temporary Supply, Extablish Temporary in Permanent, and Establish Permanent Supply, Supply Alteration	. <u>Safety Certificate:</u> • Victoria = (Certificate of Electrical Safety (CES); • SA = Electrical Certificate of Compliance (ECC – note that this will be picked up on site at time of connection); • TAS = reference to Certificate of Electrical Compliance (CEC) on EWR; • ACT, NSW & QLD = not applicable; <u>Other Forms:</u> • Victoria = Electrical Works Request (EWR); Notice of Metering Works (NOMW); • SA = FORM A; • TAS = Electrical Works Request (EWR); • ACT = RFS; • Queensland = Energex - Electrical Works Request (EWR) or Ergon Energy - Request for Initial Connection, Metering Change or Service Alteration (FORM A).	• EWR • NOMW • FORM A • RFS
Re-energisation	In Victoria, if a service has been off supply (de-energised) for more than 12 months, the SIRs (Service Installation Rules) require a notification that a safety check has been conducted by an electrical contractor. Certified Evidence that an Installation is safe to reconnect, e.g. EWR, CES or Letter, is required. In SA, if a service has been off supply (de-energised) for more than 12 months or due to a site defect an Electrical Certificate of Compliance (ECC) is required. In TAS, if a service has been off supply (de-energised) for more than 6 months or due to a site defect, a reference to an Certificate of Electrical Compliance (CEC) is required. . <u>Safety Certificate:</u> • Victoria = (Certificate of Electrical Safety (CES)); • SA = Electrical Certificate of Compliance (ECC – note that this will be picked up on site at time of connection); <u>Other Forms:</u> • Victoria, TAS = Electrical Works Request (EWR); • Letter from a Licensed Electrical Inspector or Registered Electrical Contractor. • Reconnection of Supply form.	• Letter • EWR • RoS

Service Order Type/SubType	*Description*	*Form Reference Allowed Values**
De-energisation	In NSW, for De-energisation after non-payment, the Retailer must provide the Service Provider (via email) an Assurance Notification. The Assurance Notification advises the Service Provider the Retailer has the right to arrange for de-energisation under its contract with the customer and as permitted under the National Energy Retail Rules.	Not Applicable
Metering Service Works	Safety Certificate: • Victoria = (Certificate of Electrical Safety (CES); • SA = Electrical Certificate of Compliance (ECC – note that this will be picked up on site at time of connection); • TAS = reference to Certificate of Electrical Compliance (CEC) on EWR; • ACT, NSW & QLD = not applicable; Other Forms: • Victoria = Electrical Works Request (EWR); Notice of Metering Works (NOMW); • SA = FORM A; • TAS = Electrical Works Request (EWR); • ACT = RFS; • Queensland = Energex - Electrical Works Request (EWR) or Ergon Energy- Request for Initial Connection, Metering Change or Service Alteration (FORM A).	• EWR • NOMW • FORM A • RFS
Supply Service Works - Supply Abolishment	Safety Certificate: • ACT, NSW, TAS & QLD = not applicable; Other Forms: • Victoria = Electrical Works Request (EWR); Notice of Metering Works (NOMW); Application for Abolishment of Electrical Supply (AAES). • SA = FORM A; • TAS = Electrical Works Request (EWR) or Application for Supply Abolishment (ASA) • ACT = RFS; • Queensland = Ergon Energy - Request for the Abolishment of Supply and removal of Ergon Energy Electrical Asset form (SUPABOL).	• EWR • NOMW • AAES • FORM A • ASA • RFS • RAS • SUPABOL

* In the SO field “FormDocumentReference” values for Safety Certificates such as CES & ECC are not allowed. The Safety Certificate reference number should be entered in the “SafetyCertificateID” field of a SO.