South Australian Government
Customer Concession Scheme for Energy

July 1 2014
(Scheme Commenced July 2004)
# South Australian Customer Concession Scheme for Energy

## DOCUMENT DETAILS

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<tr>
<td>Division</td>
<td>Community Connect</td>
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<tr>
<td>Responsible Officer</td>
<td>Isabel Fforde – Manager, Policy</td>
</tr>
<tr>
<td></td>
<td>Lindy McAdam – Director, Community Connect</td>
</tr>
<tr>
<td>Approval</td>
<td>Lindy McAdam – Director, Community Connect</td>
</tr>
<tr>
<td></td>
<td>Peter Bull – Executive Director, YCO</td>
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## CONTACT PERSON (for enquiries or amendments)

<table>
<thead>
<tr>
<th>Name</th>
<th>Isabel Fforde</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Manager, Policy</td>
</tr>
<tr>
<td>Directorate</td>
<td>Community Connect</td>
</tr>
<tr>
<td>Telephone Number</td>
<td>08 8226 6901</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:isabel.fforde@sa.gov.au">isabel.fforde@sa.gov.au</a></td>
</tr>
</tbody>
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1. **Definitions and Interpretation**

In this *Scheme*:

1.1 **backdated concession** means— an amount determined by the *Department* as the amount of a *concession(s)* to which an *eligible energy concession customer* is entitled but did not receive an *energy concession* at any time during the period, being for a period not earlier than the *eligibility commencement date* and no later than the start date of the first *billing period* after the date in which the determination for eligibility is made;

1.2 **billing cycle** means—the regular recurrent period for which a *customer* receives a bill from the *retailer* which is generally issued, in accordance with the *Energy Retail Code*, each *financial quarter* but may be more often where the *retailer* has obtained a *customer’s explicit informed consent* to issue bills on that basis;

1.3 **billing period** means— in respect of each *residential customer* of a *retailer*, the usual billing period applying to that customer;

1.4 **Centrelink** means— the body that comes under the *Department of Human Services* which is responsible for the development of service delivery policy and provides access to social, health and other payments and services;

1.5 **CSHC** means— the *Commonwealth Seniors Health Card*;

1.6 **concession** means—

   (a) an *energy concession*; or

   (b) a *MHCC*

1.7 **connection point** means—

   (a) in the case of a *small electricity customer*, the agreed point of *supply* between the *small electricity customer’s electrical installation* and the *distribution network*;

   and

   (b) In the case of a *small gas customer*, the agreed point of *supply* between the *small gas customer’s gas installation* and the *distribution system*;

1.8 **customer** means— a person who applies for, or receives, an *energy concession* or a *MHCC* under the *Scheme*;

1.9 **customer sale contract** means— a *standing contract*, a *market contract* or a *default contract*;

1.10 **daily energy concession amount** has the meaning— described in Schedule 2;

1.11 **daily MHCC amount** has the meaning— described in Schedule 4;

1.12 **deemed customer retailer arrangement** means— an arrangement between the *Retailer* and the *customer* under Division 9 of Part 2 of the *National Energy Retail Law (South Australia) 2011*;

1.13 **default contract** means—
(a) the customer sale contract between a retailer and a default customer arising in accordance with the regulations under the Electricity Act 1996 (SA) or the Gas Act 1997 (SA), as the context requires; or

(b) a deemed customer retail arrangement;

1.14 default customer means—

(a) in relation to a connection point, a person who is deemed pursuant to the regulations under the Electricity Act 1996 (SA) or the Gas Act 1997 (SA), as the context requires, having a default contract with a retailer in relation to that connection point; or

(b) a person under a deemed customer retail arrangement;

1.15 Department means— the South Australian Government department responsible for the administration of the Scheme;

1.16 Department of Human Services means— the Commonwealth Government department which integrates the services of Medicare Australia, Centrelink and CRS Australia through the Human Services Legislation Amendment Act 2011 (Cth) from 1 July 2011;

1.17 dependant means—

(a) the customer’s partner or spouse;

(b) a child under 16 years of age;

(c) a child 16-18 years of age in receipt of Youth Allowance from Centrelink; and

(d) a child 16-24 years of age in full time education in receipt of Youth Allowance, Austudy, or Abstudy from Centrelink;

1.18 eligibility commencement date means— the date determined as the effective start date for the calculation of a concession for an eligible energy concession customer, as described in paragraph 3.3, or an eligible MHCC customer, as described in paragraph 4.3;

1.19 eligible beneficiary or LIHC card customer means— a customer who meets the criteria in paragraph 1 of Schedule 1 and has the status for the purposes of eligibility for an energy concession determined by the Minister as holding a LIHC card or being in receipt of a prescribed payment as described in paragraph 2 of Schedule 1;

1.20 eligible energy concession customer means— a customer who is:

(a) an eligible pensioner or CSHC customer, or

(b) an eligible beneficiary or LIHC card customer;

1.21 eligible MHCC customer means— a Customer who meets the criteria and status for the purposes of eligibility for a MHCC determined by the Minister as described in Schedule 3;

1.22 eligible pensioner or CSHC customer means— a customer who meets the criteria in paragraph 1 of Schedule 1 and the status for the purposes of eligibility for an energy concession determined by the Minister as holding a prescribed card, but not including a LIHC card, as described in paragraph 2 of Schedule 1;
energy concession means—the discount in the cost of energy provided to an eligible energy concession customer of an amount determined by the Minister from time to time and set out in Schedule 2, payable:

(a) where the eligible energy concession customer’s energy is provided by an on grid electricity or off grid electricity source under an electricity bill; or

(b) where the eligible energy concession customer’s energy is provided by an alternate energy source, including but not only Liquid Petroleum Gas bottles purchased by the eligible energy concession customer, on a pay as use basis, directly to the eligible energy concession customer;

Energy Retail Code means—the industry code pursuant to the powers of the Essential Services Commission of South Australia under section 28 of the Essential Services Commission Act 2002 (SA) which regulates some of the terms on which a retailer sells electricity or sells and supplies gas (referred to collectively in this Energy Retail Code as energy) to small customers at a supply address under a customer sale contract;

explicit informed consent means—the customer clearly and explicitly gives their consent to the Department for the use of their personal information for the purposes of the Scheme. When dealing with a customer who has a limited or diminished capacity to understand an explicit informed consent agreement, consent can be obtained from a legally authorised person able to provide consent on behalf of the customer (e.g. a parent or legal guardian);

financial month means—each of the following periods each financial year:

1 January to 31 January;
1 February to 28 February or in a leap year 1 February to 29 February;
1 March to 31 March;
1 April to 30 April;
1 May to 31 May;
1 June to 30 June;
1 July to 31 July;
1 August to 31 August;
1 September to 30 September;
1 October to 31 October;
1 November to 30 November;
1 December to 31 December;

financial quarter means—each of the following periods each financial year:

1 January to 31 March;
1 April to 30 June;
1 July to 30 September;
1 October to 31 December;

1.28 **GST** means— the tax imposed by the **GST Law**;

1.29 **GST exclusive** in relation to energy charges means— an amount excluding the recovery of GST payable by the retailer;

1.30 **GST Law** has the meaning— which is attributed in the *A New Tax System (Goods and Services Tax) Act 1999 (Cth)*;

1.31 **LIHC** means— the **Low Income Health Care (LIHC)**;

1.32 **market contract** means—

(a) a contract between a customer and a retailer for the sale of electricity, other than a standing contract or a default contract; or

(b) a market retail contract under section 33 of the **National Energy Retail Law (South Australia) 2011**;

1.33 **MHCC** means— the discount in the cost of energy provided to an eligible **Medical Heating and Cooling Concession (MHCC)** customer in an amount determined by the **Minister** from time to time and set out in Schedule 3, payable:

(a) where the eligible MHCC customer’s energy is provided by an on grid electricity or off grid electricity source under an electricity bill; or

(b) where the eligible MHCC customer’s energy is provided by an alternate energy source, including but not only Liquid Petroleum Gas bottles purchased by the eligible MHCC customer, on a pay as use basis, directly to the eligible MHCC customer;

1.34 **Minister** means— as the context requires:

(a) the Minister for Mineral Resources and Energy, a body corporate established under the **Administrative Arrangements Act 1994 (SA)**; or

(b) where there exists a delegation of authority by the Minister for Energy and Mining to the Minister for Human Services for the purpose of undertaking the functions of the Minister for Energy and Mining referred to in section 21(1)(h) of the *Electricity Act 1996 (SA)* or the **National Energy Retail Law (South Australia) 2011**;

1.35 **MIRN** means— a Meter Installation Registration Number (MIRN) assigned to a metering installation at a gas customer’s supply address;

1.36 **NERL** means— **National Energy Retail Law (South Australia) 2011**;

1.37 **NERR** means—

(a) the initial **National Energy Retail Rules (NERR)**; and

(b) rules made by the Australian Energy Market Commission under the **National Energy Retail Law (South Australia) 2011**, including Rules that amend or revoke—

i. the initial NERR; or
ii. rules made by it;

1.38 **NMI** means— a National Metering Identifier (NMI) assigned to a metering installation at an electricity customer’s supply address in accordance with the National Electricity Rules;

1.39 **on grid electricity** means— the electricity stored on a large scale within an electrical power grid;

1.40 **on grid electricity retailer** means— a NERL retailer as defined under section 4 of the Electricity Act 1996 (SA);

1.41 **off grid electricity** means— the electricity provided to homes that does not rely on an electrical power grid;

1.42 **off grid electricity retailer** means— an energy retailer licensed under the Electricity Act 1996 (SA) to sell off grid electricity to residential customers in South Australia;

1.43 **personal information** means—

(a) where used in relation to a Retailer, the same as the meaning given in the Privacy Act 1988 (Cth); and

(b) where used in relation to the Department, the same meaning as given in the South Australian Government “Information Privacy Principles Instruction”;

1.44 **residential customer** means— a small customer who acquires energy for domestic use;

1.45 **retailer** means—

(a) a person holding a licence issued under Part 3 of the Electricity Act 1996 (SA) authorising the retailing of electricity; or

(b) a NERL retailer as defined under section 4 of the Electricity Act 1996 (SA) and under section 4 of the Gas Act 1997 (SA); or

(c) a retailer holding a licence issued under Part 3 of the Gas Act 1997 (SA);

1.46 **Scheme** means— the South Australian Government Concession Scheme for Energy;

1.47 **services** means— the services the retailer must provide to the South Australian Government specified in the Scheme;

1.48 **standing contract** means— a standard contract made in accordance with Division 3 of Part 2 of the National Energy Retail Law (South Australia) 2011;

1.49 **small customer** means—

(a) either or both of small electricity customer and small gas customer with the same meaning as in the Electricity Act 1996 (SA) and Gas Act 1997 (SA) respectively; or

(b) small customer as defined under section 5 of the National Energy Retail Law (South Australia) 2011;

1.50 **supply** means— the delivery of electricity or gas to a customer;
1.51 supply address means— the address for which a customer purchases gas or electricity from an energy retailer which for the purposes of determining an eligibility commencement date may be an address for a residence occupied by the customer prior to the customer applying for a concession;

1.52 tax invoice has the meaning— attributed in the GST Law;

2. DESCRIPTION OF SCHEME

2.1 The South Australian Government Concession Scheme for Energy (the Scheme) is established and approved by the Minister for Human Services through arrangements made by the Minister for Energy and Mining in committing responsibility for the administration of energy concessions to the Minister for Human Services.

2.2 Responsibilities specified in the Scheme for on grid electricity retailers (Schedule 5), and for off grid electricity retailers (Schedule 6), licensed under Part 3 of the Electricity Act 1996 (SA) to sell electricity to residential customers in South Australia (the State) are issued pursuant to sections 21(1)(h) and 63AD of the Electricity Act 1996 (SA), respectively.

2.3 The Scheme comprises the provision of the following concessions:

2.3.1 Energy concessions and, where applicable, backdated concessions to eligible energy concession customers; and

2.3.2 MHCC and, where applicable, backdated MHCC to eligible MHCC customers.

2.4 The Scheme commenced on 1 February 2004 and became operational as follows:

2.4.1 A transitional period applied from 1 February 2004 to 30 September 2004 during which period a retailer and the Department could, by agreement, depart from the requirements of the Scheme;

2.4.2 Retailers and the Department must comply with the requirements of the Scheme as amended from time to time, from 1 October 2004.

2.5 The Scheme prescribes the manner in which the energy concession and the MHCC are provided and comprises:

2.5.1 Customers’ eligibility criteria for entitlement;

2.5.2 Customers’ requirements in submitting an application for energy concessions;

2.5.3 Retailers’ responsibilities as set out in Schedule 5 for on grid electricity Retailers and Schedule 6 for off grid electricity retailers in issuing energy concessions to eligible energy concession customers under the assumption by retailers of community service obligations (CSOs) in the form of the energy concession and services.

2.5.4 The Department’s responsibilities in:

2.5.4.1 receiving and managing applications for concessions to:
2.5.4.1.1 maintain effective records management;
2.5.4.1.2 ensure confidentiality of customers’ personal information;
2.5.4.1.3 manage explicit informed consent provided by the customer.

2.5.4.2 assessing the eligibility of customers for the energy concession and MHCC;
2.5.4.3 reviewing customers’ ongoing eligibility for the energy concession and MHCC;
2.5.4.4 issuing energy concessions to eligible energy concession customers either by direct payment to the customers or through arrangement with retailers as a deduction on energy accounts by discounting the GST exclusive amount recorded on each eligible energy concession customer’s energy bill for energy consumed by the customer;
2.5.4.5 issuing the MHCC to eligible MHCC customers by direct payment to the customers.

2.6 The responsibilities within the Scheme for retailers in issuing the energy concession on behalf of the South Australian Government are pursuant to:

2.6.1 section 21(1)(h) of the Electricity Act 1996 (SA) for off grid electricity retailers (set out in Schedule 6);
2.6.2 section 63AD of the Electricity Act 1996 (SA) (set out in Schedule 5) for on grid electricity retailers;
2.6.3 section 25 (1)(g) of the Gas Act 1997 (SA) regarding gas related concessions.

3. ENERGY CONCESSION

3.1 Issuing of an energy concession is subject to approval by the Department of a:

3.1.1 fully completed application submitted by the customer to the Department in the manner described in paragraph 5; and
3.1.2 customer’s eligibility for an energy concession based on the criteria described in Schedule 1.

3.2 The energy concession is issued for eligible energy concession customers as described in paragraph 3.4 from the eligibility commencement date which is determined as described in paragraph 3.3 until:

3.2.1 changes to the customer’s circumstances deem the customer no longer meets the eligibility criteria as described in Schedule 1; or
3.2.2 at the discretion of the Minister, changes to the eligibility criteria described in Schedule 1 deem the customer no longer meets the eligibility criteria for an energy concession.
3.3 The *eligibility commencement date* for an *eligible energy concession customer* is determined as whichever of the following dates is the most recent:

3.3.1 1 January of the previous calendar year of the date on which the Department received the Application for a Concession; or

3.3.2 the date of grant identified by Centrelink for the *eligible energy concession customers* in holding a prescribed card receiving a prescribed payment from the Commonwealth Government as described in Schedule 1; or

3.3.3 the date on which the *eligible energy concession customer* commenced residing in the *supply address* identified on their energy bill or energy bills and was named as an account holder on their energy bill.

3.4 An *energy concession* is issued to an *eligible energy concession customer* from their *eligibility commencement date* for an *energy concession* and for subsequent *billing periods* for an amount calculated in respect of the *billing period(s)* for which an *eligible energy concession customer* is eligible either:

3.4.1 in accordance with the *billing cycle* of their retailer(s);

3.4.2 on the presentation of an energy bill(s) by the *eligible energy concession customer* to the *Department* which must include at least the following particulars on each bill:

3.4.2.1 details identifying the *eligible energy concession customer* as the person or one of the persons named as an account holder;

3.4.2.2 the customer’s account number where the *eligible energy concession customer* has been issued an account number by the retailer;

3.4.2.3 the *billing period* of the energy consumption charged on the energy bill;

3.4.2.4 the total amount of fees, charges and tariffs for the provision of energy to the *eligible energy concession customer* for the specified *billing period*; and

3.4.2.5 the metering identifier, where a metering installation exists at a customer’s *supply address*, which may include:

3.4.2.5.1 for the provision of electricity the National Metering Identifier (*NMI*); or

3.4.2.5.2 for the provision of gas the Meter Installation Registration Number (*MIRN*), noting an energy concession is only issued on the presentation of an energy bill for the supply of gas where the *eligible energy concession customer*’s *supply address* is not connected to the supply of electricity by on grid electricity or off grid electricity.

3.5 The amount of the *energy concession* is calculated by multiplying the number of days in the *billing period* identified on an energy bill for an *eligible energy concession customer* by the *daily energy concession amount* described in Schedule 2 determined in respect of the *eligible energy concession customer* where:

3.5.1 the *energy concession* is issued once to an *eligible energy concession customer* per *billing period*;
3.5.2 the amount of the energy concession does not exceed pro rata the annual energy concession amount per annum described in Schedule 2.

3.6 Where the energy concession is deducted from the energy concession customers energy bill the energy concession amount must be discounted on the GST exclusive amount recorded on each eligible energy concession customer’s energy bill for energy consumed by the customer.

3.7 Approved applicants will be entitled to a backdated concession of the energy concession where an eligible energy concession customer is entitled to, but did not receive an energy concession at any time during that period.

3.8 The amount determined by the Department for a backdated concession will be determined as follows:

Approved applicants will be entitled to a backdated payment of the concession to 1 January of the previous calendar year from the date the application is received, or to eligibility commencement date, whichever is later, unless otherwise determined by the Minister.

4. Medical Heating and Cooling Concession

4.1 Issuing of a MHCC is subject to approval by the Department of a:

4.1.1 fully completed application submitted by the customer to the Department in the manner described in paragraph 6; and

4.1.2 Customer’s eligibility for a MHCC based on the criteria described in Schedule 3.

4.2 The MHCC is issued for eligible MHCC customers as described in paragraph 4.4 from the eligibility commencement date which is determined as described in paragraph 4.3 until:

4.2.1 changes to the customer’s circumstances deem the customer no longer meets the eligibility criteria as described in Schedule 3; or

4.2.2 at the discretion of the Minister, changes to the eligibility criteria described in Schedule 3 deem the customer no longer meets the eligibility criteria for a MHCC.

4.3 The eligibility commencement date for an eligible MHCC customers is determined as whichever of the following dates is the most recent:

4.3.1 The date of the introduction by the State of the MHCC of 1 July 2011; or

4.3.2 The date certified by the authorising medical practitioner that the customer’s medical condition met the criteria described in Schedule 3; or

4.3.3 1 January of the previous calendar year of the date on which the Department received the application for a MHCC; or

4.3.4 the date of grant identified by Centrelink for the eligible MHCC customers in holding a prescribed card or receiving a prescribed payment from the Commonwealth Government as described in Schedule 3; or
4.3.5 the date on which the eligible MHCC customer commenced residing in the supply address identified on the energy bill(s).

4.4 A MHCC is issued to an eligible MHCC customer from their eligibility commencement date for a MHCC and for each financial quarter for an amount calculated in respect of the financial quarter(s) for which an eligible MHCC customer is eligible.

4.5 The amount of the MHCC is calculated by multiplying the number of days in the financial quarter by the daily MHCC amount described in Schedule 4 determined in respect of the eligible MHCC customer where the:

4.5.1 MHCC is issued once to an eligible MHCC customer per financial quarter;

4.5.2 amount of the MHCC does not exceed pro rata the annual MHCC amount per annum described in Schedule 4.

5. APPLICATIONS FOR ENERGY CONCESSIONS

Customers seeking status as Eligible Energy Concession Customers from 1 July 2008

5.1 A customer who seeks an energy concession as a new eligible energy concession customer must:

5.1.1 make application directly to the Department; and

5.1.2 provide to the Department the information required by the Department.

5.2 A customer who seeks a backdated concession as a new eligible customer must:

5.2.1 make application directly to the Department; and

5.2.2 provide to the Department the information required by the Department.
6. Applications for Medical Heating and Cooling Concessions

Customers seeking status as Eligible MHCC Customers from 1 July 2011

6.1 A customer who seeks an energy concession as a new eligible energy concession customer must:

6.1.1 make application directly to the Department; and

6.1.2 provide to the Department the information required by the Department.

6.2 A customer who seeks a backdated concession as a new eligible MHCC customer must:

6.2.1 make application directly to the Department; and

6.2.2 provide to the Department the information required by the Department.

7. Personal Information and Consent

7.1 Personal Information

7.1.1 In order to receive a concession, a customer must provide the Department access to personal and related information necessary to assess their eligibility for a concession at the time of submitting an application for a concession.

7.1.2 In obtaining any personal information or in dealing with personal information from customers for the purposes of this Scheme, a retailer must comply with the Privacy Act 1988 (Cth); and

7.1.3 In dealing with any personal information under the Scheme the Department will comply with the South Australian Government “Information Privacy Principles Instruction”.

7.2 Consent

7.2.1 In obtaining personal information from a customer for the purposes of the Scheme the Department must obtain explicit informed consent from the customer in order to use the personal information on behalf of the customer to:

7.2.1.1 match details on the customer electronically or directly with Centrelink or the Department of Veterans’ Affairs; and

7.2.1.2 exchange information on the customer electronically or directly with retailers.
7.2.2 *Explicit informed consent* may be provided in writing signed by the *customer* or via electronic communication by the *Customer*.

7.2.3 A *customer* has the right to give, refuse or revoke consent.

7.2.4 The *Department* must retain records of any *explicit informed consent* obtained under the *Scheme* and, where applicable, the subsequent revoking by the *customer* of the *explicit informed consent* for a period of at least 7 years following the ceasing of the relationship between the *Customer* and the *Department* for the purposes the *Scheme*.

7.2.5 The *Department* must retain records of any *explicit informed consent* obtained under the *Scheme* for the period described in 7.2.4 in a format that would permit an entity permitted by law to access the records to understand readily the details of *explicit informed consent* in respect of particular *customers*.
8. **Scheme History**

**Notes**

- References in the Scheme to legislation or instruments or to titles of bodies or offices are not automatically updated and therefore may be obsolete.
- Earlier versions of the Scheme (historical versions) are listed at the end of the Scheme history.

**Historical Versions**

- July 2004
- September 2012
- May 2013
Schedule 1

Eligibility Criteria for Customer’s Seeking an Energy Concession

To be entitled to an energy concession a customer must:

1. meet all of the following criteria:
   1.1 Be a South Australian resident; and
   1.2 The customer seeking the energy concession must be named as an account holder on the energy account for the energy concession customers’ residential address; and
   1.3 The supply address identified on the energy account must be the customer’s principal place of residence; and
   1.4 No one living with the customer who is not a spouse, partner or a dependant has an income of $3000 or more per year which is not a benefit or pension from Centrelink or the Department of Veterans’ Affairs.

and

2. Hold a prescribed card or is in receipt of a prescribed payment where:
   2.1 a prescribed card means—
      2.1.1 a Pensioner Concession Card issued by the Commonwealth Government; or
      2.1.2 a TPI Gold Repatriation Health Card issued by the Commonwealth Government; or
      2.1.3 a Gold Repatriation Health Card issued by the Commonwealth Government to a person with 80 or more overall impairment points under the Military Rehabilitation and Compensation Act 2004 of the Commonwealth;
      2.1.4 a War Widows Gold Repatriation Health Card issued by the Commonwealth Government; or
      2.1.5 a Gold Repatriation Health Card (EDA) issued by the Commonwealth Government; or
      2.1.6 Commonwealth Seniors Health Card issued by the Commonwealth Government (eligible from 1 January 2004); or
      2.1.7 a State Concession Card issued by the South Australian Government; or
      2.1.8 LIHC card issued by the Commonwealth Government (eligible from 1 July 2010).

   2.2 a prescribed payment means—
      2.2.1 any of the following payments under the Social Security Act 1991 (Cth):
         2.2.1.1 an Austudy payment;
         2.2.1.2 a newstart allowance;
         2.2.1.3 a parenting payment;
2.2.1.4 a partner allowance;  
2.2.1.5 a sickness allowance;  
2.2.1.6 a special benefit;  
2.2.1.7 a widow allowance;  
2.2.1.8 a youth allowance; or

2.2.2 Abstudy payments from the Commonwealth Government; or

2.2.3 payments under the Community Development Employment Project established by the Commonwealth Government; or

2.2.4 payment under the New Enterprise Incentive Scheme established by the Commonwealth Government; or

2.2.5 a pension as a war widow under legislation of the United Kingdom or New Zealand.
Schedule 2

Energy Concession Amount

In this Scheme the Energy Concession amount means—

(a) For the period commencing 1 July 2014— *daily energy concession amount* of $0.5890 to a maximum of $215.00 per annum

(b) For the period commencing 1 July 2012— *daily energy concession amount* of $0.4521 to a maximum of $165.00 per annum

(c) For the period commencing 1 July 2011— *daily energy concession amount* of $0.4328 to a maximum of $158 per annum

(d) For the period commencing 1 July 2010— *daily energy concession amount* of $0.4109 to a maximum of $150 per annum

(e) For the period commencing 1 January 2004— *daily energy concession amount* of $0.3287 to a maximum of $120 per annum

(f) For the period before 1 January 2004— *daily energy concession amount* of $0.1917808 to a maximum of $70 per annum.

The energy concession amount may be updated by Cabinet from time to time and the Minister will communicate changes with retailers.
Schedule 3

Eligibility Criteria for Customer’s Seeking a Medical Heating and Cooling Concession

To be entitled to a MHCC a customer must:

1. meet all of the following criteria:
   1.1 Be a South Australian resident; and
   1.2 The supply address identified on the energy account must be the customer’s principal place of residence; and
   1.3 Be financially responsible for the payment or part payment of the energy bill; and
   1.4 Have a qualifying medical condition:
      1.4.1 The primary medical condition and associated secondary criteria must require the use of an air conditioner or heating for medical purposes to ensure the impact of hot or cold weather does not severely exacerbate the condition.
      1.4.2 Qualifying conditions include Multiple Sclerosis, Parkinson’s Disease, Lymphoedema (>Grade 1), Fibromyalgia, Tetraplegia, Post Polio syndrome/Poliomyelitis, Motor Neurone Disease, Systemic Lupus Erythematosus (SLE), Muscular Dystrophy or specify an ‘Other qualifying condition’ which may include spinal cord injury, some neurodegenerative disorders and severe inflammatory skin conditions.
      1.4.3 In addition to the primary condition the patient must also meet one of the secondary criteria from the following list, either:
         1.4.3.1 In this patient this condition is known to be associated with symptomatic deterioration in hot or cold weather
         OR
         1.4.3.2 The primary condition, in conjunction with the following secondary condition, results in a symptomatic deterioration of this patient’s medical condition in hot or cold weather:
            1.4.3.2.1 Loss of proper autonomic regulation of sweating, heart rate or blood pressure (associated with hot or cold weather);
            1.4.3.2.2 Loss of skin integrity or sweating capacity (including significant burns [or pressure skin garment] to greater than 20% surface area, severe inflammatory skin conditions and some rare forms of disordered sweating);
            1.4.3.2.3 Hypersensitivity to extremes of environmental temperature leading to an unacceptable increase in pain/discomfort or an increased risk of complications.
1.4.3.2.4 Verified (or known) loss of physiological function or significant aggravation of clinical condition at extremes of environmental temperature.

1.4.3.2.5 Clinically verified thermoregulatory dysfunction (the nature of this must be recorded in the patient's case record).

1.4.3.2.6 Provide certification from a medical specialist or general practitioner that the medical condition is severely exacerbated by hot or cold weather.

and

2. hold a prescribed card or is in receipt of a prescribed payment where:

2.1 a prescribed card means—

2.1.1 a Pensioner Concession Card issued by the Commonwealth Government; or

2.1.2 a TPI Gold Repatriation Health Card Issued by the Commonwealth Government; or

2.1.3 a Gold Repatriation Health Card issued by the Commonwealth Government to a person with 80 or more overall impairment points under the Military Rehabilitation and Compensation Act 2004 of the Commonwealth; or

2.1.4 a War Widows Gold Repatriation Health Card issued by the Commonwealth Government; or

2.1.5 a Gold Repatriation Health Card (EDA) issued by the Commonwealth Government; or

2.1.6 Commonwealth Seniors Health Card issued by the Commonwealth Government (eligible from 1 January 2004); or

2.1.7 a State Concession Card issued by the South Australian Government; or

2.1.8 Low Income Health Care Card issued by the Commonwealth Government.

3. a prescribed payment means—

3.1 any of the following payments under the Social Security Act 1991 (Cth):

3.1.1 an Austudy payment;

3.1.2 a newstart allowance;

3.1.3 a parenting payment;

3.1.4 a partner allowance;

3.1.5 a sickness allowance;

3.1.6 a special benefit;

3.1.7 a widow allowance;

3.1.8 a youth allowance; or
3.2 Abstudy payments from the Commonwealth Government; or
3.3 payments under the Community Development Employment Project established by the Commonwealth Government; or
3.4 payment under the New Enterprise Incentive Scheme established by the Commonwealth Government; or
3.5 a pension as a war widow under legislation of the United Kingdom or New Zealand.

4. Children with medical conditions

4.1 Where the person with a qualifying medical condition set out in paragraph 1 is a dependent child, the income eligibility for a MHCC will be based on the parent or legal guardian holding an eligible Centrelink prescribed card or prescribed payment as set out in paragraphs 2 and 3.

4.2 Where a child with a qualifying medical condition set out in paragraph 1 is in a foster care arrangement, the carer’s income will be exempt from the eligibility criteria as set out in paragraphs 2 and 3 in assessing the eligibility for a MHCC for that child.

4.3 Where shared care arrangements are in place for a child with a qualifying medical condition set out in paragraph 1, each parent/guardian party to the shared care arrangements for that child may qualify for a MHCC proportionate to the time the parent/guardian party cares for the child.
Schedule 4

Medical Heating and Cooling Concession Amount

In this Scheme the MHCC amount means—

(a) For the period commencing 1 July 2014 – daily MHCC amount of $0.5890 to a maximum of $215.00 per annum

(b) For the period commencing 1 July 2012 – daily MHCC amount of $0.4521 to a maximum of $165.00 per annum

(c) For the period commencing 1 July 2011 – daily MHCC amount of $0.4328 to a maximum of $158 per annum

The MHCC amount may be updated by Cabinet from time to time and the Minister will communicate changes with retailers.
Schedule 5

Arrangements for On Grid Electricity Retailers under the Scheme

1. PURPOSE

This document prescribes the arrangements between the on grid electricity retailer (retailer) and the Department under the South Australian Government Customer Concession Scheme for Energy pursuant to Section 63AD of the Electricity Act 1996 (SA).

1.1 Retailers’ responsibilities in issuing energy concessions to eligible energy concession customers under the assumption by retailers of community service obligations (CSOs) in the form of the energy concession and services;

1.2 The payment of retailers on behalf of the South Australian Government in consideration of CSOs and services;

1.3 Communication between the Department and the retailers to provide timely information and response to operational aspects of the energy concessions administration which includes regular relationship meetings.

2. DEPARTMENT CONCESSION PROCESSING

2.1 Processing Applications for an Energy Concession

2.1.1 When the Department determines a customer is an eligible energy concession customer the Department must, where an eligible energy concession customer’s energy is provided by the retailer, forward to the retailer the authority to issue an energy concession to the customer, in an electronic format as specified in Schedule 6 File 1.

2.2 Processing Energy Concessions and Backdated Concessions by the Department

2.2.1 When the Department determines a customer is an eligible beneficiary or LIHC card customer the amount of discount applied as the energy concession and the backdated concession to an eligible beneficiary or LIHC card customer’s electricity bill is calculated by the Department by multiplying the number of days in the customer’s billing period that the customer was eligible for the energy concession by the daily energy concession amount relevant for that specific billing period.

2.2.2 When the Department determines an eligible pensioner or CSHC customer is eligible for a backdated concession the amount of discount applied as the backdated concession to an eligible pensioner or CSHC customer’s electricity bill is calculated by the Department by multiplying the number of days in the customer’s billing period that the customer was eligible for the backdated concession by the daily energy concession amount relevant for that specific billing period.

2.2.3 When the Department determines a customer is an eligible beneficiary or LIHC card customer the Department must, where an eligible beneficiary or LIHC card customer’s energy is provided by the retailer, forward to the retailer the authority to issue an energy concession to the customer, in an electronic format as specified in Schedule 6 File 3.

2.2.4 When the Department determines an eligible energy concession customer is entitled to a backdated concession amount, the Department must, where an eligible energy
concession customer’s energy is provided by the retailer, forward to the retailer, in an electronic format, the authority to issue a backdated concession to the customer in the format specified for:

2.2.4.1 Eligible pensioner or CSHC customers in Schedule 6 File 2; or

2.2.4.2 Eligible beneficiary or LIHC customers in Schedule 6 File 3.

2.3 Identifying Changes in Eligibility for an Energy Concession

2.3.1 When the Department identifies that a customer previously assessed and reported to the retailer as an eligible pensioner or CSHC customer no longer meets the eligibility criteria for an energy concession as specified in the Scheme, the Department must forward to the retailer, who sells energy to the eligible pensioner or CSHC customer an electronic report, in the format specified in Schedule 6 File 4, authorising the retailer to cease issuing an energy concession to the customer.

3. ENERGY RETAILER CONCESSION PROCESSING

3.1 Reporting to the Department

3.1.1 If the retailer becomes aware that information in a report by the Department under paragraph 2 is incorrect or out of date, the retailer must provide the Department with an electronic report in the format specified in Schedule 6 File 5 identifying any corrections necessary to be made by the Department.

3.2 Processing Applications

3.2.1 The retailer must treat as an eligible energy concession customer all eligible pensioner or CSHC customers and eligible beneficiary or LIHC customers identified in an electronic report by the Department to the retailer in the format specified in Schedule 6 File 1 or eligible pensioner or CSHC customers or in Schedule 6 File 3 for eligible beneficiary or LIHC card customers.

3.3 Processing Energy Concessions and Backdated Concessions by the Retailer

3.3.1 The retailer must commence the calculation of an energy concession in relation to a new eligible pensioner and CSHC customer from the first day of the billing period for that eligible pensioner and CSHC customer being the billing period in which the retailer received the electronic report from the Department in the format specified in Schedule 6 File 1 identifying any new eligible pensioner and CSHC customer authorised by the Department.

3.3.2 For each billing period the retailer must discount the GST exclusive amount recorded on each eligible energy concession customer’s energy bill for energy consumed by the:

3.3.2.1 Energy concession amount determined by the retailer in respect of the eligible pensioner or CSHC customer for that billing period which is calculated by the retailer by multiplying the number of calendar days between the start and end date of the customer’s specific billing period for which that customer was eligible for an energy concession, by the daily energy concession amount relevant for that specific billing period as set out in Schedule 2;
3.3.2.2 Energy concession amount calculated by the Department in respect of eligible beneficiary or LIHC customers and advised to the retailer by an electronic report in the format specified in Schedule 6 File 3;

3.3.2.3 Backdated concession (if any) amount calculated by the Department in respect of the eligible pensioner or CSHC customer and advised by the Department to the retailer by an electronic report in the format specified in Schedule 6 File 2;

3.3.2.4 Backdated concession (if any) amount calculated by the Department in respect of the eligible beneficiary or LIHC customers and advised by the Department to the retailer by an electronic report in the format specified in Schedule 6 File 3.

3.3.3 The retailer must ensure that:

3.3.3.1 the energy concession is applied no more than once to an eligible energy concession customer per specific billing period; and

3.3.3.2 the energy concession is applied once to a supply address per specific billing period; and

3.3.3.3 the amount of the energy concession discount applied to an eligible energy concession customer or eligible energy concession customers at the same supply address does not exceed pro rata the maximum energy concession amount per annum specified in the Scheme.

3.3.4 The retailer must only apply a discount to an electricity bill in respect of a backdated concession in the manner specified in the previous paragraph for the billing period if:

3.3.4.1 the Department advises the retailer, by report in the format specified in Schedule 6 File 2, that the eligible pensioner or CSHC customer is entitled to a backdated concession; and

3.3.4.2 the Department advises the retailer, by report in the format specified in Schedule 6 File 3, that the eligible beneficiary or LIHC card customer is entitled to a backdated concession; and

3.3.4.3 the retailer has confirmed that that the eligible energy concession customer did not receive any energy concession discount from the retailer during the period which the backdated concession relates.

3.3.5 If the retailer has identified that the eligible energy concession customer did receive any energy concession discount during the period to which the backdated concession relates, then the retailer must not apply the backdated concession and advise the Department by electronic report in the format specified in Schedule 6 File 5.

3.4 Other Retailer Services

The retailer must:

3.4.1 assist the Department to correct any information relevant to the Scheme that the Department identifies as having been incorrectly provided to the retailer or incorrectly recorded by the retailer;

3.4.2 ensure that when an eligible energy concession customer notifies the retailer of a change in the eligible energy concession customer’s details:
3.4.2.1 the *Department* receives a report in the format set out in Schedule 6 File 6, including the *eligible energy concession customer*’s new details; and

3.4.2.2 if the change does not affect the *eligible energy concession customer*’s eligibility for *energy concessions* the *eligible energy concession customer* continues to receive the relevant *energy concession*.

3.4.3 include on energy bills to all *eligible energy concession customer* the following statement:

3.4.3.1 *The South Australian Government Customer Concession Scheme for Energy is administered by the South Australian Department of Human Services. For details about concessions and how to apply please contact the ConcessionsSA Hotline on 1800 307 758 or go to www.sa.gov.au/concessions’*

3.4.3.2 or such other statement agreed between the *retailer* and the *Department*.

3.4.4 indicate on each energy bill to an *eligible energy concession customer* the amount of any discount applied in respect of an *energy concession* or *backdated concession* in accordance with the *Scheme*.

3.4.5 if the *retailer* refers to the *Scheme* or any aspect of the *Scheme* in material produced for *residential customers*, identify that the *Scheme* is an initiative of the South Australian Government.

4. **ADMINISTRATIVE ARRANGEMENTS BETWEEN RETAILER AND THE DEPARTMENT**

4.1 Each of the *Department* and the *retailer* must:

4.1.1 on request, provide the other with the information the other reasonably requires to meets its obligations under the *Scheme* and to monitor the progress of the *Scheme*; and

4.1.2 in the case of a new *retailer* negotiate in good faith with the other with the purpose of reaching an agreement within three months of offering to sell energy to *customers*, as to processes for the efficient day-to-day operation of the *Scheme* including as to:

4.1.2.1 the exchange of information relevant to *eligible energy concession customers*, including by the reports required by the *Scheme* set out in Schedule 6;

4.1.2.2 communications between the *retailer* and the *Department* for the purposes of the *Scheme* generally; and

4.1.2.3 a dispute resolution procedure.

5. **PAYMENT TO RETAILERS FOR THE SERVICES**

5.1 In consideration for a *retailer* providing the *services* to the State on the terms and conditions of this *Scheme*, the *Department* must pay in advance a monthly estimated charge (“monthly charge”) to the *retailer* where the *retailer* submits to the *Department* a valid *tax invoice* claiming payment of the monthly charge.

5.2 The monthly charge is calculated as described in paragraph 5.5 and includes an administration fee equal to $A0.25 per customer where the *retailer* is eligible for funding for the administrative support services provided by the *retailer* in accordance with the *Scheme*. 
5.3 The total administration fee payable to a retailer must not exceed $A1.00 per annum per eligible energy concession customer.

5.4 The retailer must submit to the Department a valid tax invoice claiming payment of the monthly charge at least once a financial quarter and no more frequent than once a financial month.

5.5 The amount of the monthly charge is calculated according to the following formula:

\[ MEC = 1.1(E((EC + AF)/NMQ) + BEC) \]

Where MEC = Monthly charge.

AF = Administration Fee specified in paragraph 5.2.

BEC = The sum of all backdated concessions deducted by the Retailer from eligible energy concession customer’s bills during the preceding financial month or financial months for the period included in the tax invoice.

E = The retailer’s reasonable estimate of the number eligible energy concession customers who will claim energy concessions in the current financial quarter.

EC = Energy concessions amount issued by the retailer for the period being claimed.

NMQ = The number of financial months in a financial quarter of a year.

The monthly charge includes an amount (equivalent to one eleventh [1/11] of the total) attributable to GST, payable by the retailer in respect of supplies made to the Department pursuant to this Scheme.

5.6 The valid tax invoice submitted by the retailer to the Department claiming payment of the monthly charge must state the retailer’s estimate of the number of eligible energy concession customers expected to claim energy concessions in the current financial quarter, and detail the calculation of the monthly charge.

5.7 Unless the Department disputes the amount of the monthly charge, the Department must within 28 working days of the retailer submitting a valid tax invoice, forward by Electronic Funds Transfer (EFT) to a bank account nominated by the retailer the monthly charge set out in the tax invoice.

5.8 The Department will withhold payment to a retailer as described in paragraph 5 where it is deemed by the Department the retailer has not complied with the audit and reconciliation requirements set out in Paragraph 6.

6. AUDIT AND RECONCILIATION BETWEEN RETAILERS AND THE DEPARTMENT

6.1 Reconciliation Process

6.1.1 Within thirty days of the end of each financial quarter, the retailer must forward to the Department an itemised statement ("Reconciliation Statement") of the total energy concessions and backdated concessions required by the Scheme and applied by the
6.1.2 Within 28 days after the retailer’s submission of the Reconciliation Statement to the Department, the Department will calculate and notify to the retailer a reconciliation amount as follows:

“RA” = (MEC1 + MEC2 + MEC3) −1.1(ATC + (ANCxAF)) Where:

AF = As defined in paragraph 5.2
ANC = Number of eligible energy concession customers who received energy concessions or backdated concessions from the retailer during the financial quarter.
ATC = The aggregate of energy concessions and backdated concessions that the retailer was obliged to apply and did apply in accordance with the Scheme during the financial quarter.
RA = Reconciliation amount
MEC = As defined in Clause 5.5
MEC1 = MEC for first month of financial quarter
MEC2 = MEC for second month of financial quarter
MEC3 = MEC for third month of financial quarter.

6.1.3 If the Reconciliation Amount calculated as RA in clause 6.1.2 is a positive number, the retailer must within thirty days or the number of days agreed by the Department for the payment of a positive RA amount for a given retailer, pay that amount in dollars to the Department.

6.1.4 If the Reconciliation Amount calculated as RA in clause 6.1.2 is a negative number, the Department must within thirty days of the receipt of a valid tax invoice submitted by the retailer which includes a charge for the negative RA amount, pay that amount in dollars to the retailer.

6.1.5 The retailer must issue an adjustment note under the GST Law in respect of any payment due or made under clause 6.1.2 within twenty-eight days of notification under clause 6.1.2.

6.1.6 If the Department wishes to audit the amounts shown in a Reconciliation Statement, the retailer must permit the Department to audit its records of customer accounts, energy concessions and backdated concessions.

6.1.7 If at any time the Department considers that the amounts claimed by or paid to the retailer exceed the amounts that should have been paid under this Scheme, the Department may set-off the amount of the discrepancy against future payments under this Scheme.

6.1.8 If the retailer disputes the amount assessed by the Department it may submit a notice to the Minister requesting reconsideration of the disputed amount.
7. ENERGY RETAILER CONCESSION SERVICES

7.1 Providing Information on Concessions

NERL retailers as defined under section 4 of the Electricity Act 1996 (SA) must:

7.1.1 when requested by a residential customer, pass on, as soon as is reasonably practicable, any information concerning the availability of concessions provided to the retailer from time to time by the Department.

7.1.2 give the residential customer information on government funded concessions and, if applicable, refer the residential customer to the Department.

7.1.3 as part of the retailers obligations outlined under rule 33 of the NERR, provide the residential customer information about the availability of government funded energy charge rebate, concession or relief schemes.

7.1.4 report to the Minister upon request on the operation of the Scheme including information reasonably requested by the Minister as to whether or not the energy retailer is meeting the Minister’s Requested Services contained in paragraph 8.

8. MINISTER’S REQUESTED SERVICES

8.1 The following are additional services the Minister requests of retailers:

8.1.1 that retailers do not discriminate against market contract customers on the basis that they are eligible energy concession customers; and

8.1.2 that retailers make market contracts available to eligible energy concession customers including at least one contract option that:

8.1.2.1 does not allow for the imposition of an early contract termination penalty; and

8.1.2.2 offers a range of payment options.

8.2 The requests referred to in 8.1 are non-binding but the Minister has approved the Scheme on the assumption that the requests will be met and reserves the right to amend the Scheme if that assumption proves to be incorrect.
Schedule 6

Electronic Report Format for On Grid Electricity Retailers

The following specifies the format of files exchanged between on grid electricity retailers and the Department for the administration around issuing energy concessions on electricity bills.

<table>
<thead>
<tr>
<th>File Description</th>
<th>Submitted By</th>
<th>Received By</th>
<th>Frequency¹</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1 New Concessions File</strong> provides details on eligible pensioner or CSHC customers approved by the Department for an Energy Concession</td>
<td>Department</td>
<td>Retailer</td>
<td>Weekly</td>
</tr>
<tr>
<td><strong>2 Permanent Concession Backdate File</strong> provides details on backdated concession amounts to be applied to specific eligible pensioner or CSHC customers electricity bills</td>
<td>Department</td>
<td>Retailer</td>
<td>Weekly</td>
</tr>
<tr>
<td><strong>3 Beneficiary File</strong> provides details on energy concession amounts, including amounts for backdated periods, for eligible beneficiary or LIHC card customers</td>
<td>Department</td>
<td>Retailer</td>
<td>Weekly</td>
</tr>
<tr>
<td><strong>4 Ineligible Customer Notification File</strong> provides details on previously identified eligible pensioner or CSHC customers when they subsequently become ineligible.</td>
<td>Department</td>
<td>Retailer</td>
<td>Weekly</td>
</tr>
<tr>
<td><strong>5 Retailer Mismatch File</strong> provides details on energy concessions for eligible pensioner or CSHC customers or eligible beneficiaries or LIHC card customers, including backdated concessions, (i.e. records provided in Files 1,2 and 3 above) which are not able to be matched to the retailer’s database</td>
<td>Retailer</td>
<td>Department</td>
<td>Weekly</td>
</tr>
<tr>
<td><strong>6 Change Notification File</strong> provides details on changes in an eligible pensioner or CSHC customers electricity account:</td>
<td>Retailer</td>
<td>Department</td>
<td>Not Currently Used</td>
</tr>
<tr>
<td>1. Change of address and NMI</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Renumbered account</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>7 Reconciliation File</strong> provides details to identify eligible pensioner or CSHC customers or eligible beneficiary or LIHC customers who have been issued an energy concession by the retailer</td>
<td>Retailer</td>
<td>Department</td>
<td>Quarterly</td>
</tr>
</tbody>
</table>

Specifications regarding the file layout: All files will be in XML format;

1. The Data types used in the definition are, “X” for text data, “N” for numeric data and “D” for dates.
2. The size is the maximum size for the data field.
3. All XML tags start with a lowercase letter with embedded words starting with a capital e.g. “fileIdentifier”.
4. Fields identified as ‘Not Required’ may continue to be used until retailer and the Department’s systems are updated to remove these fields. The use of these fields will be reviewed as part of future system developments.
5. Fields identified as ‘Not Used’ do not contain data when files are generated, however until legacy systems are changed these fields will remain.

¹ The frequency specified for each file is the minimum requirement as Retailers and the Department may negotiate more frequent arrangements as required.
1. New Concessions File

The New Concessions File (refer 2.1.1, 3.2.1 and 3.3.1) is generated by the Department to provide details to the retailer on eligible pensioner or CSHC customers approved by the Department for an energy concession. On receipt of this information the retailer is to commence issuing an energy concession to the specified customer with an effective date being the start date of the billing period in which the file is submitted for the specific customer. The New Concessions File contains 3 types of records:

- Header Record;
- Customer Record – one record per customer; and
- Trailer Record.

1.1 Header Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
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<td>Field Identifier</td>
<td>H1</td>
<td>X</td>
<td>X</td>
<td>fileIdentifier</td>
<td>M</td>
<td>Must be “New Concessions Data Output”</td>
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<tr>
<td>Export Identifier</td>
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<td>Retailer Identifier</td>
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<td>Unique identifier provided by the Department to each Retailer</td>
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<tr>
<td>File Date</td>
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<td>contactName</td>
<td>M</td>
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### Customer Record

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<th>Mandatory or Optional</th>
<th>Notes</th>
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<td>O</td>
<td>Reference number used by Retailer to identify the customer</td>
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<tr>
<td>NMI</td>
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<td>N</td>
<td>NMI</td>
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<td>National Metering Identifier – NMI Checksum also required</td>
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<td>The customer name must be the name on the concession application form, not the name on the account</td>
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<tr>
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<td>customerSurname</td>
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<td></td>
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Status: Not Used

### Spouse/Partner – Surname
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Status: Not in Use

### Reference Number Spouse/Partner
Field Name: F15 | Ref: X | Size: 15 | Type: partnerReferenceNumber
Status: Not in Use

### Card Type – Customer
Field Name: F16 | Ref: X | Size: 7 | Type: customerCardType
Status: Not Required

### Date of grant – Customer
Field Name: F17 | Ref: D | Size: 8 | Type: customerDateOfGrant
Status: Not Required

### Card Type of Spouse/Partner
Field Name: F18 | Ref: X | Size: 7 | Type: partnerCardType
Status: Not Used

### Date of grant Spouse/Partner
Field Name: F19 | Ref: D | Size: 8 | Type: partnerDateOfGrant
Status: Not Used

### Date application received by the Department
Field Name: F20 | Ref: D | Size: 8 | Type: applicationReceivedDate
Status: M YYYYMMDD

### Trailer Record
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Records</td>
<td>T1</td>
<td>6</td>
<td>N</td>
<td>numRecords</td>
<td>M</td>
<td>Required to validate all records have been received</td>
</tr>
</tbody>
</table>
2. Permanent Concession Back Date File

The Permanent Concession Back Date File (refer 2.2.4.1, 3.2.1, 3.3.2.3 and 3.3.4.1) is generated by the Department to provide details to the retailer on backdated concession amounts to be applied to specific eligible pensioner or CSHC customers electricity bills. The Permanent Concession Back Date File contains three types of records:

- Header Record;
- Customer Record – there is one record per customer; and
- Trailer Record.

### 2.1 Header Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Identifier</td>
<td>H1</td>
<td>X</td>
<td></td>
<td>fileIdentifier</td>
<td>M</td>
<td>Must be “Permanent Concession Back Date”</td>
</tr>
<tr>
<td>Export Identifier</td>
<td>H2</td>
<td>10</td>
<td>N</td>
<td>exportIdentifier</td>
<td>M</td>
<td>ID of Export transaction which is to be used for invoicing and referencing in Exception Reports</td>
</tr>
<tr>
<td>Retailer Identifier</td>
<td>H3</td>
<td>10</td>
<td>X</td>
<td>retailerIdentifier</td>
<td>M</td>
<td>Unique identifier provided by the Department to each Retailer</td>
</tr>
<tr>
<td>File date</td>
<td>H4</td>
<td>8</td>
<td>D</td>
<td>fileDate</td>
<td>M</td>
<td>YYYYMMDD</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H5</td>
<td>35</td>
<td>X</td>
<td>contactName</td>
<td>M</td>
<td>Name of Department representative</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H6</td>
<td>20</td>
<td>X</td>
<td>contactPhone</td>
<td>M</td>
<td>Phone number must include the STD code</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H7</td>
<td>35</td>
<td>X</td>
<td>contactEmail</td>
<td>M</td>
<td>Email address of the Department representative</td>
</tr>
</tbody>
</table>
### 2.2 Customer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>F1</td>
<td>15</td>
<td>N</td>
<td>accountNumber</td>
<td>M</td>
<td>Customer’s account number as provided by the Retailer to the Department</td>
</tr>
<tr>
<td>Reference No</td>
<td>F2</td>
<td>15</td>
<td>X</td>
<td>referenceNumber</td>
<td>O</td>
<td>Reference number used by Retailer to identify the customer</td>
</tr>
<tr>
<td>NMI</td>
<td>F3</td>
<td>15</td>
<td>N</td>
<td>NMI</td>
<td>M</td>
<td>National Metering Identifier – NMI checksum also required</td>
</tr>
<tr>
<td>Customer Given Names</td>
<td>F4</td>
<td>35</td>
<td>X</td>
<td>customerGivenNames</td>
<td>M</td>
<td>The customer name is the name on the concession application form, not the name on the account</td>
</tr>
<tr>
<td>Customer Surname</td>
<td>F5</td>
<td>35</td>
<td>X</td>
<td>customerSurname</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Date application received by the Department</td>
<td>F6</td>
<td>8</td>
<td>D</td>
<td>applicationReceivedDate</td>
<td>M</td>
<td>YYYYMMDD End Date of the most recent backdate period</td>
</tr>
<tr>
<td>Last Reading Date</td>
<td>F7</td>
<td>8</td>
<td>D</td>
<td>lastReadingDate</td>
<td>M</td>
<td>Retailers to use this date to ensure that backdate payment is not applied to a period for which a concession has already been applied</td>
</tr>
<tr>
<td>Concession Amount</td>
<td>F8</td>
<td>10</td>
<td>N</td>
<td>concessionAmount</td>
<td>M</td>
<td>Total amount of concession to the customer including any back payments.</td>
</tr>
</tbody>
</table>
### Trailer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Records</td>
<td>T1</td>
<td>6</td>
<td>N</td>
<td>numRecords</td>
<td>M</td>
<td>Required to validate all records have been received</td>
</tr>
<tr>
<td>Total</td>
<td>T2</td>
<td>10</td>
<td>N</td>
<td>concessionTotal</td>
<td>M</td>
<td>Must equal total of Concession Amount fields</td>
</tr>
</tbody>
</table>
3. **Beneficiary File**

The **Beneficiary File** (refers to 2.2.3, 2.2.4.2, 3.3.2.2, 3.3.2.4 and 3.3.42) is generated by the Department to provide details to the retailer on the amount of the energy concession calculated by the Department, including any amount for backdated periods, for eligible beneficiary or LIHC card customers. On receipt of this information the retailer applies the specified concession amount(s), which are always for previous billing periods, on the next electricity bill to be issued to the customer. The **Beneficiary File** contains 3 types of records:

- Header Record;
- Customer Record – one record per customer; and
- Trailer Record.

### 3.1 **Header Record**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Identifier</td>
<td>H1</td>
<td>X</td>
<td>X</td>
<td>fileIdentifier</td>
<td>M</td>
<td>Must be “Beneficiary Data Output”</td>
</tr>
<tr>
<td>Export Identifier</td>
<td>H2</td>
<td>10</td>
<td>N</td>
<td>exportIdentifier</td>
<td>M</td>
<td>ID of Export transaction which is to be used to invoicing and referencing in Exception Reports</td>
</tr>
<tr>
<td>Retailer Identifier</td>
<td>H3</td>
<td>10</td>
<td>X</td>
<td>retailerIdentifier</td>
<td>M</td>
<td>Unique identifier provided by the Department to each Retailer</td>
</tr>
<tr>
<td>File Date</td>
<td>H4</td>
<td>8</td>
<td>D</td>
<td>fileDate</td>
<td>M</td>
<td>YYYYMMDD</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H5</td>
<td>35</td>
<td>X</td>
<td>contactName</td>
<td>M</td>
<td>Name of Department representative</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H6</td>
<td>20</td>
<td>X</td>
<td>contactPhone</td>
<td>M</td>
<td>Phone number must include the STD code</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H7</td>
<td>35</td>
<td>X</td>
<td>contactEmail</td>
<td>M</td>
<td>Email address of the Department representative</td>
</tr>
</tbody>
</table>
### Customer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>F1</td>
<td>15</td>
<td>X</td>
<td>accountNumber</td>
<td>M</td>
<td>Customer’s account number as provided to the Department</td>
</tr>
<tr>
<td>NMI</td>
<td>F2</td>
<td>15</td>
<td>N</td>
<td>NMI</td>
<td>M</td>
<td>National Metering Identifier – NMI checksum also required</td>
</tr>
<tr>
<td>Customer Given Names</td>
<td>F3</td>
<td>35</td>
<td>X</td>
<td>customerGivenNames</td>
<td>M</td>
<td>The customer name must be the name on the concession application form, not the name on the account</td>
</tr>
<tr>
<td>Customer Surname</td>
<td>F4</td>
<td>35</td>
<td>X</td>
<td>customerSurname</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Date application received by the Department</td>
<td>F5</td>
<td>8</td>
<td>D</td>
<td>applicationReceivedDate</td>
<td>M</td>
<td>YYYYMMDD</td>
</tr>
<tr>
<td>Last Reading Date</td>
<td>F6</td>
<td>8</td>
<td>D</td>
<td>lastReadingDate</td>
<td>M</td>
<td>YYYYMMDD End Date of the most recent backdate period. Retailers to use this date to ensure that backdate payment is not applied to a period for which a concession has been applied.</td>
</tr>
<tr>
<td>Concession Amount</td>
<td>F7</td>
<td>10</td>
<td>N</td>
<td>concessoinAmount</td>
<td>M</td>
<td>Total amount of concession to be made to the customer including any back payments.</td>
</tr>
</tbody>
</table>
### 3.3 Trailer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Records</td>
<td>T1</td>
<td>6</td>
<td>N</td>
<td>numRecords</td>
<td>M</td>
<td>Required to validate all records have been received</td>
</tr>
<tr>
<td>Total</td>
<td>T2</td>
<td>10</td>
<td>N</td>
<td>concessionTotal</td>
<td>M</td>
<td>Must equal total of Concession Amount fields</td>
</tr>
</tbody>
</table>
4. Ineligible Customers Notification File

The Ineligible Customers Notification File (refer 2.3.1) is generated by the Department to provide details to the retailer on customers who were previously identified as eligible pensioner or CSHC customers and who have since become ineligible. On receipt of this information the retailer ceases the issuing of an energy concession on the accounts of the customers identified in the file. Concessions are ceased effective from the start date of the billing period in which the file is submitted by the Department. The Ineligible Customers Notification File contains 3 types of records:

- Header Record;
- Customer Record – one record per customer; and
- Trailer Record.

4.1 Header Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Identifier</td>
<td>H1</td>
<td>X</td>
<td>X</td>
<td>fileIdentifier</td>
<td>M</td>
<td>Must be “Ineligible Customers Notification”</td>
</tr>
<tr>
<td>Export Identifier</td>
<td>H2</td>
<td>15</td>
<td>X</td>
<td>exportIdentifier</td>
<td>M</td>
<td>The Input Identifier of the file to which the Exception applies</td>
</tr>
<tr>
<td>Retailer Identifier</td>
<td>H3</td>
<td>10</td>
<td>X</td>
<td>retailerIdentifier</td>
<td>M</td>
<td>Unique identifier provided by the Department to each Retailer</td>
</tr>
<tr>
<td>File Date</td>
<td>H4</td>
<td>8</td>
<td>D</td>
<td>fileDate</td>
<td>M</td>
<td>YYYYMMDD</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H5</td>
<td>35</td>
<td>X</td>
<td>contactName</td>
<td>M</td>
<td>Name of Department representative</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H6</td>
<td>20</td>
<td>X</td>
<td>contactPhone</td>
<td>M</td>
<td>Phone number must include the STD code</td>
</tr>
<tr>
<td>Department Contact Name</td>
<td>H7</td>
<td>35</td>
<td>X</td>
<td>contactEmail</td>
<td>M</td>
<td>Email address of the Department representative</td>
</tr>
<tr>
<td>Field Name</td>
<td>Ref</td>
<td>Size</td>
<td>Type</td>
<td>XML tag</td>
<td>Mandatory or Optional</td>
<td>Notes</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----</td>
<td>------</td>
<td>------</td>
<td>---------------</td>
<td>-----------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Account Number</td>
<td>F1</td>
<td>15</td>
<td>X</td>
<td>accountNumber</td>
<td>M</td>
<td>Customer’s account number provided by the Retailer</td>
</tr>
<tr>
<td>Reference No</td>
<td>F2</td>
<td>15</td>
<td>X</td>
<td>referenceNumber</td>
<td>O</td>
<td>Reference number used by Retailer to identify the customer – Checksum also required where applicable.</td>
</tr>
<tr>
<td>NMI</td>
<td>F3</td>
<td>15</td>
<td>N</td>
<td>NMI</td>
<td>M</td>
<td>National Metering Identifier – NMI checksum also required</td>
</tr>
<tr>
<td>Customer Given Names</td>
<td>F4</td>
<td>35</td>
<td>X</td>
<td>customerGivenNames</td>
<td>M</td>
<td>The customer name must be the name on the concession application, not the name on the account</td>
</tr>
<tr>
<td>Customer Surname</td>
<td>F5</td>
<td>35</td>
<td>X</td>
<td>customerSurname</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Mailing Address 1</td>
<td>F6</td>
<td>100</td>
<td>X</td>
<td>mailingAddress1</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Mailing Address 2</td>
<td>F7</td>
<td>100</td>
<td>X</td>
<td>mailingAddress2</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Mailing Suburb</td>
<td>F8</td>
<td>50</td>
<td>X</td>
<td>mailingSuburb</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Mailing Post Code</td>
<td>F9</td>
<td>4</td>
<td>N</td>
<td>mailingPostCode</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Reason Code</td>
<td>F10</td>
<td>3</td>
<td>X</td>
<td>reasonCode</td>
<td>Not Used</td>
<td></td>
</tr>
</tbody>
</table>
## 4.3 Trailer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Records</td>
<td>T1</td>
<td>6</td>
<td>N</td>
<td>numRecords</td>
<td>M</td>
<td>Required to validate all records have been received</td>
</tr>
</tbody>
</table>
5. Retailer Mismatch File

The Retailer Mismatch File (refer 3.1.1 and 3.3.5) is generated by the retailer to provide details to the Department on concessions for eligible beneficiaries or LIHC customers, including backdated concessions, (i.e. records provided in Files 1, 2 and 3) which are not able to be matched to the Retailer’s database. The Retailer Mismatch File contains three types of records:

- Header Record;
- Customer Record – one record per customer; and
- Trailer Record.

5.1 Header Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Identifier</td>
<td>H1</td>
<td></td>
<td>X</td>
<td>fileIdentifier</td>
<td>M</td>
<td>Must be “Retailer Mismatch Exceptions”</td>
</tr>
<tr>
<td>Input Identifier</td>
<td>H2</td>
<td>10</td>
<td>N</td>
<td>inputIdentifier</td>
<td>M</td>
<td>ID of Matching Export file</td>
</tr>
<tr>
<td>Retailer Identifier</td>
<td>H3</td>
<td>10</td>
<td>X</td>
<td>retailerIdentifier</td>
<td>M</td>
<td>Unique identifier provided by the Department to each Retailer</td>
</tr>
<tr>
<td>File Date</td>
<td>H4</td>
<td>8</td>
<td>D</td>
<td>fileDate</td>
<td>M</td>
<td>YYYYMMDD</td>
</tr>
<tr>
<td>Retailer Contact Name</td>
<td>H5</td>
<td>35</td>
<td>X</td>
<td>contactName</td>
<td>M</td>
<td>Name of retailer representative</td>
</tr>
<tr>
<td>Retailer Contact Phone</td>
<td>H6</td>
<td>20</td>
<td>X</td>
<td>contactPhone</td>
<td>M</td>
<td>Phone number must include the STD code</td>
</tr>
<tr>
<td>Retailer Contact Email</td>
<td>H7</td>
<td>35</td>
<td>X</td>
<td>contactEmail</td>
<td>M</td>
<td>Email address of retailer representative</td>
</tr>
</tbody>
</table>
### 5.2 Customer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>F1</td>
<td>15</td>
<td>N</td>
<td>accountNumber</td>
<td>M</td>
<td>Customer’s account number provided by the Retailer</td>
</tr>
<tr>
<td>Reference No</td>
<td>F2</td>
<td>15</td>
<td>X</td>
<td>referenceNumber</td>
<td>O</td>
<td>Reference number used by Retailer to identify the customer</td>
</tr>
<tr>
<td>NMI</td>
<td>F3</td>
<td>15</td>
<td>N</td>
<td>NMI</td>
<td>M</td>
<td>National Metering Identifier – NMI checksum also required</td>
</tr>
<tr>
<td>Customer Given Names</td>
<td>F4</td>
<td>35</td>
<td>X</td>
<td>customerGivenNames</td>
<td>M</td>
<td>The customer name must be the name on the concession application form, not the name on the account</td>
</tr>
<tr>
<td>Customer Surname</td>
<td>F5</td>
<td>35</td>
<td>X</td>
<td>customerSurname</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Reason Code</td>
<td>F6</td>
<td>3</td>
<td>X</td>
<td>reasonCode</td>
<td>M</td>
<td>Refer Appendix A for valid reason codes</td>
</tr>
</tbody>
</table>

### 5.3 Trailer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Records</td>
<td>T1</td>
<td>6</td>
<td>N</td>
<td>numRecords</td>
<td>M</td>
<td>Required to validate all records have been received</td>
</tr>
</tbody>
</table>
6. Change Notification Input File

The Change Notification File (refer 3.4.3.1) was previously generated by the retailer to provide details to the Department on changes in an eligible pensioner or CSHC customer’s electricity account. With the centralisation of receiving and processing ‘Applications for an Energy Concession’ within the Department this file is not currently used. Changes to the requirement for this file will be address in the next revision of the Scheme.

The Change Notification File contained 3 types of records:

- Header Record
- Customer Record – one record per customer
- Trailer Record.

6.1 Header Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Identifier</td>
<td>H1</td>
<td>X</td>
<td>X</td>
<td>fieldIdentifier</td>
<td>M</td>
<td>Must be “Concession Details Change Notification”</td>
</tr>
<tr>
<td>Input Identifier</td>
<td>H2</td>
<td>15</td>
<td>X</td>
<td>inputIdentifier</td>
<td>M</td>
<td>Used to identify the Input File for future reference. Provides association for any exception report files. Value to be determined by the Retailer</td>
</tr>
<tr>
<td>Retailer Identifier</td>
<td>H3</td>
<td>10</td>
<td>X</td>
<td>retailerIdentifier</td>
<td>M</td>
<td>Unique identifier provided by the Department to each Retailer</td>
</tr>
<tr>
<td>File Date</td>
<td>H4</td>
<td>8</td>
<td>D</td>
<td>fileDate</td>
<td>M</td>
<td>YYYYMMDD</td>
</tr>
<tr>
<td>Retailer Contact Name</td>
<td>H5</td>
<td>35</td>
<td>X</td>
<td>contactName</td>
<td>M</td>
<td>Name of retailer representative</td>
</tr>
<tr>
<td>Retailer Contact Phone</td>
<td>H6</td>
<td>20</td>
<td>X</td>
<td>contactPhone</td>
<td>M</td>
<td>Phone number must include the STD code</td>
</tr>
<tr>
<td>Retailer Contact Email</td>
<td>H7</td>
<td>35</td>
<td>X</td>
<td>contactEmail</td>
<td>M</td>
<td>Email address of the retailer representative</td>
</tr>
</tbody>
</table>
6.2  **Customer Record**

Where a field is optional only those fields that have been updated need to be provided.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>F1</td>
<td>15</td>
<td>X</td>
<td>accountNumber</td>
<td>M</td>
<td>Customer’s account number provided by the retailer</td>
</tr>
<tr>
<td>CRN</td>
<td>F2</td>
<td>15</td>
<td>X</td>
<td>referenceNumber</td>
<td>M</td>
<td>Reference number used by Retailer to identify the customer.</td>
</tr>
<tr>
<td>NMI</td>
<td>F3</td>
<td>15</td>
<td>N</td>
<td>NMI</td>
<td>M</td>
<td>National Metering Identifier – NMI checksum also required</td>
</tr>
<tr>
<td>Customer Given Names</td>
<td>F4</td>
<td>35</td>
<td>X</td>
<td>customerGivenNames</td>
<td>M</td>
<td>The customer name must be the name on the concession application, not the name on the account</td>
</tr>
<tr>
<td>Customer Surname</td>
<td>F5</td>
<td>35</td>
<td>X</td>
<td>customerSurname</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Mailing Address 1</td>
<td>F6</td>
<td>100</td>
<td>X</td>
<td>mailingAddress1</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Mailing Address 2</td>
<td>F7</td>
<td>100</td>
<td>X</td>
<td>mailingAddress2</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Mailing Suburb</td>
<td>F8</td>
<td>50</td>
<td>X</td>
<td>mailingSuburb</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Mailing Post Code</td>
<td>F9</td>
<td>4</td>
<td>N</td>
<td>mailingPostCode</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Reason Code</td>
<td>F10</td>
<td>3</td>
<td>X</td>
<td>reasonCode</td>
<td>M</td>
<td></td>
</tr>
</tbody>
</table>
### Trailer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Records</td>
<td>T1</td>
<td>6</td>
<td>N</td>
<td>numRecords</td>
<td>M</td>
<td>Required to validate all records have been received</td>
</tr>
</tbody>
</table>
6. Reconciliation File

The Reconciliation File (refer 6.1.1) is generated by the retailer to provide details to the Department to identify eligible pensioner or CSHC customers or eligible beneficiary or LIHC customers who have been issued an energy concession by the retailer. This information provides information for the Department in reconciling claims from the retailer for payment of service charges and reimbursement of concessions issued by the retailer on behalf of the South Australian Government. The Reconciliation File contains 3 types of records:

- Header Record
- Customer Record –
  - one record per customer for the energy concession
  - one record per customer for the backdated concession
- Trailer Record.

7.1 Header Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Identifier</td>
<td>H1</td>
<td>X</td>
<td></td>
<td>fieldIdentifier</td>
<td>M</td>
<td>Must be “Concession Reconciliation Input”</td>
</tr>
<tr>
<td>Input Identifier</td>
<td>H2</td>
<td>15</td>
<td>X</td>
<td>inputIdentifier</td>
<td>M</td>
<td>Used to identify the Input File for future reference. Provides association for the attached invoice and exception report files. Value to be determined by the Retailer.</td>
</tr>
<tr>
<td>Retailer Identifier</td>
<td>H3</td>
<td>10</td>
<td>X</td>
<td>retailerIdentifier</td>
<td>M</td>
<td>Unique identifier provided by the Department to each Retailer</td>
</tr>
<tr>
<td>File Date</td>
<td>H4</td>
<td>8</td>
<td>D</td>
<td>fileDate</td>
<td>M</td>
<td>YYYYMMDD</td>
</tr>
<tr>
<td>Retailer Contact Name</td>
<td>H5</td>
<td>35</td>
<td>X</td>
<td>contactName</td>
<td>M</td>
<td>Name of retailer representative</td>
</tr>
<tr>
<td>Retailer Contact Phone</td>
<td>H6</td>
<td>20</td>
<td>X</td>
<td>contactPhone</td>
<td>M</td>
<td>Phone number must include the STD code</td>
</tr>
<tr>
<td>Retailer Contact Email</td>
<td>H7</td>
<td>35</td>
<td>X</td>
<td>contactEmail</td>
<td>M</td>
<td>Email address of the retailer representative</td>
</tr>
</tbody>
</table>
### 6.2 Customer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>F1</td>
<td>15</td>
<td>X</td>
<td>accountNumber</td>
<td>M</td>
<td>Customer’s account number provided by the Retailer</td>
</tr>
<tr>
<td>Reference No</td>
<td>F2</td>
<td>15</td>
<td>X</td>
<td>referenceNumber</td>
<td>O</td>
<td>Reference number used by Retailer to identify the customer</td>
</tr>
<tr>
<td>NMI</td>
<td>F3</td>
<td>15</td>
<td>N</td>
<td>NMI</td>
<td>M</td>
<td>National Metering Identifier – NMI Checksum also required</td>
</tr>
<tr>
<td>Customer Given Names</td>
<td>F4</td>
<td>35</td>
<td>X</td>
<td>customerGivenNames</td>
<td>M</td>
<td>The customer name must be the name on the concession application form, not the name on the account</td>
</tr>
<tr>
<td>Customer Surname</td>
<td>F5</td>
<td>35</td>
<td>X</td>
<td>customerSurname</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Number of days in the electricity billing period</td>
<td>F6</td>
<td>3</td>
<td>N</td>
<td>billingDays</td>
<td>M</td>
<td>The number of days the customer’s electricity billing period.</td>
</tr>
<tr>
<td>Concession Amount Applied</td>
<td>F7</td>
<td>10</td>
<td>N</td>
<td>concessionAmount</td>
<td>M</td>
<td>How much concession was paid for this customer during the reconciliation period.</td>
</tr>
</tbody>
</table>

### 7.3 Trailer Record

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Ref</th>
<th>Size</th>
<th>Type</th>
<th>XML tag</th>
<th>Mandatory or Optional</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Records</td>
<td>T1</td>
<td>6</td>
<td>N</td>
<td>numRecords</td>
<td>M</td>
<td>Required to validate all records have been received.</td>
</tr>
<tr>
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<td>concessionTotal</td>
<td>M</td>
<td>Must equal total of Concession Amount Applied fields.</td>
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</tbody>
</table>
Schedule 7

Arrangements for Off Grid Electricity Retailers under the Scheme

1. PURPOSE

This document prescribes the arrangements between the off grid electricity retailer (retailer) and the Department under the South Australian Government Customer Concession Scheme for Energy pursuant to Section 21(1)(h) of the Electricity Act 1996 (SA).

1.1 Retailers’ responsibilities in issuing energy concessions to eligible energy concession customers under the assumption by retailers of community service obligations (CSOs) in the form of the energy concession and services;

1.2 The payment of retailers on behalf of the South Australian Government in consideration of CSOs and services;

1.3 Communication between the Department and the retailers to provide timely information and response to operational aspects of the energy concessions administration which includes regular relationship meetings.

2. DEPARTMENT CONCESSION PROCESSING

2.1 Processing Applications for an Energy Concession

2.1.1 When the Department determines a customer is an eligible energy concession customer the Department must, where an eligible energy concession customer’s energy is provided by the retailer, forward to the retailer the authority to issue an energy concession to the customer, in a format as specified in Schedule 8; or

2.2 Processing Energy Concessions and Backdated Concessions by the Department

2.2.1 When the Department determines a customer is an eligible energy concession customer the amount of discount applied as the energy concession and the backdated concession to an eligible energy concession customer’s electricity bill is calculated by the Department by multiplying the number of days in the customer’s billing period that the customer was eligible for the energy concession by the daily energy concession amount relevant for that specific billing period.

2.2.2 When the Department determines a customer is an eligible energy concession customer the Department must, where an eligible energy concession customer’s energy is provided by the retailer, forward to the retailer the authority to issue an energy concession to the customer, in a format as specified in Schedule 8.

2.2.3 When the Department determines an eligible energy concession customer is entitled to a backdated concession amount, the Department must, where an eligible energy concession customer’s energy is provided by the retailer, forward to the retailer, in an electronic format, the authority to issue a backdated concession to the customer in the format specified in Schedule 8.
2.3 Identifying Changes in Eligibility for an Energy Concession

2.3.1 When the Department identifies that a customer previously assessed and reported to the retailer as an eligible energy concession customer no longer meets the eligibility criteria for an energy concession as specified in the Scheme, the Department must forward to the retailer, who sells energy to the eligible energy concession customer an electronic report, in the format specified in Schedule 8, authorising the retailer to cease issuing an energy concession to the customer.

3. ENERGY RETAILER CONCESSION PROCESSING

3.1 Reporting to the Department

3.1.1 If the retailer becomes aware that information in a report by the Department under paragraph 2 is incorrect or out of date, the retailer must provide the Department with a report in the format specified in Schedule 8 identifying any corrections necessary to be made by the Department.

3.2 Processing Applications

3.2.1 The retailer must treat as an eligible energy concession customer all eligible energy concession customers identified in a report by the Department to the retailer in the format specified in Schedule 8.

3.3 Processing Energy Concessions and Backdated Concessions by the Retailer

3.3.1 For each billing period the retailer must discount the GST exclusive amount recorded on each eligible energy concession customer’s energy bill for energy consumed by the:

3.3.1.1 Energy concession amount determined by the Department in respect of the eligible energy concession customer for that billing period which is calculated by the Department by multiplying the number of calendar days between the start and end date of the customer’s specific billing period for which that customer was eligible for an energy concession, by the daily energy concession amount relevant for that specific billing period as set out in Schedule 2.

3.3.1.2 Backdated concession (if any) amount calculated by the Department in respect of the eligible energy concession customer and advised by the Department to the retailer by a report in the format specified in Schedule 8.

3.3.2 The retailer must ensure that:

3.3.2.1 the energy concession is applied no more than once to an eligible energy concession customer per specific billing period; and

3.3.2.2 the energy concession is applied once to a supply address per specific billing period; and

3.3.2.3 the amount of the energy concession discount applied to an eligible energy concession customer or eligible energy concession customers at the same supply address does not exceed pro rata the maximum energy concession amount per annum specified in the Scheme.
3.3.3 The retailer must only apply a discount to an electricity bill in respect of a backdated concession in the manner specified in the previous paragraph for the billing period if:

3.3.3.1 the Department advises the retailer, by report in the format specified in Schedule 8, that the eligible energy concession customer is entitled to a backdated concession; and

3.3.3.2 the retailer has confirmed that that the eligible energy concession customer did not receive any energy concession discount from the retailer during the period which the backdated concession relates.

3.3.4 If the retailer has identified that the eligible energy concession customer did receive any energy concession discount during the period to which the backdated concessions relate, then the retailer must not apply the backdated concession and advise the Department by report in the format specified in Schedule 8.

3.4 Other Retailer Services

3.4.1 The retailer must:

3.4.1.1 assist the Department to correct any information relevant to the Scheme that the Department identifies as having been incorrectly provided to the retailer or incorrectly recorded by the retailer;

3.4.1.2 ensure that when an eligible energy concession customer notifies the retailer of a change in the eligible energy concession customer’s details:

3.4.1.2.1 the Department receives a report in the format set out in Schedule 8, including the eligible energy concession customer’s new details; and

3.4.1.2.2 if the change does not affect the eligible energy concession customer’s eligibility for energy concessions the eligible energy concession customer continues to receive the relevant energy concession.

3.4.1.3 include on energy bills to all eligible energy concession customer the following statement:

3.4.1.3.1 ‘The South Australian Government Customer Concession Scheme for Energy is administered by the South Australian Department of Human Services. For details about concessions and how to apply please contact the ConcessionsSA Hotline on 1800 307 758 or go to www.sa.gov.au/concessions’

3.4.1.3.2 or such other statement agreed between the retailer and the Department.

3.4.1.4 indicate on each energy bill to an eligible energy concession customer the amount of any discount applied in respect of an energy concession or backdated concession in accordance with the Scheme.
3.4.1.5 if the retailer refers to the Scheme or any aspect of the Scheme in material produced for residential customers, identify that the Scheme is an initiative of the South Australian Government.

4. ADMINISTRATIVE ARRANGEMENT BETWEEN RETAILER AND THE DEPARTMENT

4.1 Each of the Department and the retailer must:

4.2 On request, provide the other with the information the other reasonably requires to meets its obligations under the Scheme and to monitor the progress of the Scheme; and

4.3 in the case of a new retailer negotiate in good faith with the other with the purpose of reaching an agreement within three months of offering to sell energy to customers, as to processes for the efficient day-to-day operation of the Scheme including as to:

4.3.1 the exchange of information relevant to eligible energy concession customers, including by the reports required by the Scheme set out in Schedule 8;

4.3.2 communications between the retailer and the Department for the purposes of the Scheme generally; and

4.3.3 a dispute resolution procedure.

5. PAYMENT TO RETAILERS FOR THE SERVICES

5.1 In consideration for a retailer providing the services to the State on the terms and conditions of this Scheme, the Department must pay a service charge from time to time and within the terms as agreed between the retailer and the Department to the retailer where the retailer submits to the Department a valid tax invoice claiming payment of the service charge.

6. AUDIT AND RECONCILIATION BETWEEN RETAILERS AND THE DEPARTMENT

6.1 Both the retailer and the Department will agree to and implement a process as deemed adequate to undertake accurate audit and reconciliation of payments made from the Department to the retailer in consideration of the retailer providing the Services to the State as described in paragraph 5.

7. ENERGY RETAILER CONCESSION SERVICES

7.1 Providing Information on Concessions

Retailers licensed under Part 3 of the Electricity Act 1996 (SA) to sell electricity to customers in South Australia must:

7.1.1 When requested by a residential customer, pass on, as soon as is reasonably practicable, any information concerning the availability of concessions provided to the retailer from time to time by the Department.

7.1.2 Give the residential customer information on government funded concessions and, if applicable, refer the residential customer to the Department;

7.1.3 As part of the retailers obligations outlined under clause 7.6 of the Energy Retail Code prior to disconnection of a residential customers’ energy supply give the residential customer information on government funded Concessions and, if applicable, refer the residential customer to the Department for additional information.
7.2 Report to the Minister upon request on the operation of the Scheme including information reasonably requested by the Minister as to whether or not the energy retailer is meeting the Minister’s Requested Services contained in paragraph 8.

8. MINISTERS REQUESTED SERVICES

8.1 The following are additional services the Minister requests of retailers that retailers:

8.1.1 do not discriminate against market contract customers on the basis that they are eligible energy concession customers; and

8.1.2 make market contracts available to eligible energy concession customers including at least one contract option that:

8.1.2.1 does not allow for the imposition of an early contract termination penalty; and

8.1.2.2 offers a range of payment options.

8.2 The requests referred to in paragraph 8.1 are non-binding but the Minister has approved the Scheme on the assumption that the requests will be met and reserves the right to amend the Scheme if that assumption proves to be incorrect.
Schedule 8

Report Format for Off Grid Electricity Retailers

The report format and frequency between the off grid electricity retailer and the Department for exchanging information in respect of the Scheme will be agreed between the off grid electricity retailers and the Department in order to address the specific circumstances of each off grid electricity retailer in providing services under the Scheme.
Appendix A

Valid reason codes where a customer’s detail cannot be reconciled by the Retailer

<table>
<thead>
<tr>
<th>Reason Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>R01</td>
<td>Unknown or invalid account number</td>
</tr>
<tr>
<td>R02</td>
<td>Incorrect reference number</td>
</tr>
<tr>
<td>R03</td>
<td>Invalid or non-matching NMI</td>
</tr>
<tr>
<td>R04</td>
<td>Invalid or incorrect customer name</td>
</tr>
<tr>
<td>R05</td>
<td>Customer churned</td>
</tr>
<tr>
<td>R06</td>
<td>Concession backdate already applied</td>
</tr>
<tr>
<td>R07</td>
<td>Customer already on concession at another property</td>
</tr>
<tr>
<td>R08</td>
<td>Not a residential address</td>
</tr>
<tr>
<td>R09</td>
<td>Account Finalised</td>
</tr>
</tbody>
</table>