

Shortening the Settlement Cycle (SSC) Market Trial Strategy

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We acknowledge the Traditional Custodians of the land, seas and waters across Australia. We honour the wisdom of Aboriginal and Torres Strait Islander Elders past and present and embrace future generations.

We acknowledge that, wherever we work, we do so on Aboriginal and Torres Strait Islander lands. We pay respect to the world's oldest continuing culture and First Nations peoples' deep and continuing connection to Country; and hope that our work can benefit both people and Country.

'Journey of unity: AEMO's Reconciliation Path' by Lani Balzan

AEMO Group is proud to have launched its first [Reconciliation Action Plan](#) in May 2024. 'Journey of unity: AEMO's Reconciliation Path' was created by Wiradjuri artist Lani Balzan to visually narrate our ongoing journey towards reconciliation - a collaborative endeavour that honours First Nations cultures, fosters mutual understanding, and paves the way for a brighter, more inclusive future.

Important notice

Purpose

The Market Trial strategy sets out the high-level approach and principles associated with the National Electricity Market (**NEM**) testing activities that will support Shortening the Settlement Cycle (**SSC**) August 2026 final rule implementation.

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Version control

Version	Release date	Changes
0.1	16/01/2026	Initial draft issued for Participant review

Executive summary

AEMO and NEM participants are currently implementing the Shortening the Settlement Cycle (**SSC**) final rule change and the implementation program. The SSC Rule requires updates or changes to market procedures and market and participants' systems at various times. AEMO has a key coordination role, through collaboration with its industry working groups, to ready industry and itself for the various rule commencement and IT system "go-live" dates.

As described in the [High Level Implementation Assessment](#), a key component of market readiness is the market trial – the period where AEMO and participants test their market-interfacing business systems against updated procedures and AEMO's upgraded market systems.

At a high level, the market trial strategy defines the scope, approach, process, responsibilities and high-level schedule of the market trial period for the SSC market transition. It will be supported by a detailed test plan. The strategy is consistent with and should be read in conjunction with the [High Level Implementation Assessment](#).



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1 Introduction

This section provides background information on AEMO's SSC August 2026 final rule program and sets out the purpose, scope and approach to the development of this market trial strategy.

1.1 AEMO's SSC implementation program

On 12 December 2024 the Australian Energy Market Commission (**AEMC**) made a Final Determination and published the *National Electricity Amendment – Shortening the settlement cycle Rule 2024 no.22 (the SSC Rule)*. The change seeks to reduce working capital requirements for most market participants which will support lower prices for customers, increased investment in service innovation, lower barriers to retail electricity market entry, and reduced risk of retailer failure in the NEM.

The SSC Rule will require AEMO to implement four distinct high-level changes, described in Table 1 below.

Table 1 Changes introduced by the SSC rule

Implementation Date	Change	Description
Sun 09 Aug 2026	Settlements and billing	Incorporating the new 20-business day routine revised statement (Revision 0), new preliminary and final statement posting timeframes, new payment timeframes.
Sun 09 Aug 2026	Prudentials	Incorporating Revision 0 into Prudential calculations, changes to ex post reallocation due dates, changes to settlement estimation at the NMI level.
Sun 09 Aug 2026	Metering	Incorporating Revision 0 into MDP Data Delivery Calendar, changes to quantity and quality SLA, MSATS, and RM Reports
Expected 01 Nov 2026	Credit Limit Procedures	Implemented MCL methodology changes and shortened Outstandings time-period (to take effect from 11 December 2026).

AEMO's SSC implementation program includes the procedural, IT system and market readiness arrangements needed to implement the SSC rule including:

- [Procedures](#) – defines and implements the required changes to market procedures.
- [Systems](#) – designs, develops, tests, and implements changes to AEMO's market systems.
- [Readiness](#) – coordinates, assists and prepares AEMO and participants for the SSC rule change.
- [Stakeholder engagement](#) – supports participants in their SSC implementation work.

This document is specific to the industry testing and market trial component of market readiness for the SSC August 2026 release.

1.2 Purpose of the market trial strategy

This market trial strategy is a key component of AEMO's [SSC readiness approach](#). The purpose of the market trial strategy is to set out a plan for managing, coordinating, monitoring and reporting on AEMO's and industry's market trial activities and results.

It is a high-level document that describes the testing approach that applies to the entire SSC market trial period. As mentioned in section 5, this strategy will be supported by individual test plan(s) containing specific details about each of the planned market trial tranches. The SSC market trial test plan will be published before the start of the market trial period.

1.3 Reference documents

The following documents and web pages are relevant to the SSC market trial strategy:

- AEMC's [SSC rule change](#)
- AEMO's [SSC initiative webpage](#)
- AEMO's [SSC High Level Implementation Assessment](#)
- [SSC Transition Plan](#)

1.4 Audience

This market trial strategy is primarily intended for those affected by the SSC rule change, particularly, their:

- Test managers,
- Test leads,
- Test analysts (system integration, UAT, market trial),
- Project managers, and
- Developers and business and functional subject matter experts (SMEs).

Secondary audiences within these businesses including:

- Development managers,
- IT operations teams,
- Change controllers, and
- Operations teams.

2 Market trial framework

This section describes the framework that underpins the SSC market trial strategy. It explains the strategy's objective, scope and underlying principles. It also defines 'participant' and 'market trial' for the purpose of SSC implementation.

2.1 Defining 'participant' and 'market trial'

Throughout this document:

- The term '**participant**' for the purpose of this document refers to the participant(s) involved in the market trial activity.
- The term '**market trial**' refers to the testing performed between participants and AEMO to validate whether the updates made to participants' market interfacing systems and AEMO's market systems addresses the SSC regulatory and procedural arrangements. Market trial is conducted in the Pre-Production environment as a final stage before deployment to the production environment.

2.2 Market trial objective

The market trial provides participants the opportunity to test their updated systems and processes against AEMO's updated electricity retail and wholesale market procedures and systems. AEMO will consider the market trial results as part of the readiness criteria for its "go-live" and contingency decisions.

In relation to SSC implementation, the overall objective of the market trial is:

to support market readiness and confirm AEMO's and industry's operational preparedness for the SSC system "go-lives" and rule commencements.

3 Market trial scope

Market capability based technical, functional and business operational testing is included in the SSC market trial scope, as follows:

- **Market technical verification and validation:** Determines the technical state of the solution e.g. connectivity and provided interfaces
- **Market functional verification and validation:** Determines the state of solution as matched against required business functionality and business processes. The solution may not mirror production from a complete “go-live” perspective.
- **Market operational capability verification and validation:** Determines the state of the solution from a “go-live” perspective and verifies technical, functional, and operational compliance to obligations. Mirrors as close as possible the “go-live” state of the solution from the perspective of data, timing etc. Covers key business processes essential to the operation of the systems supporting the new rule change.

Market trial will consist of system integration testing between participants’ systems and AEMO’s systems, to test the system changes required to implement SSC August 2026. Note that the SSC market trial scope is aligned with the approach to transition and “go-live” as described in the [High Level Implementation Assessment](#).

3.1 Scope inclusions

To support the SSC August 2026 rule commencement and underlying market system changes the following functionality is in scope for the Market Trial:

- Participants can migrate and subscribe to the latest data model release (5.7).
- Participant migration to the new aseXML schema version (B2M r47).
- AEMO will implement a Market Trial-specific settlements calendar that introduces the new R0 revision that will be scheduled between the Final and R1 revisions. Participants will be able to view and ingest the new R0 output.
- To accommodate the R0 revision the settlement cycle will progressively shorten. The shortening cycle will be simulated during the Market Trial.
- Prudential Dashboard: Participants can view the NEM Prudential Dashboard and confirm that the R0 calculations are correctly applied to all necessary calculations and ensure the values in the reports match the values on the dashboard.
- Cash Dashboard: Participants will be able to view their cash position and create and update instructions via the new Cash Dashboard.

3.2 Scope exclusions

The Market Trial scope exclusions are:

- Participants' development activities.
- Changes to participants' supporting business systems that do not directly interact with AEMO's market systems (i.e. back-end system). These are addressed by participant's own test strategies.
- Any bilateral testing between participants. Participants can coordinate bilateral testing between themselves in parallel to the market trial.
- Downstream business procedures for each participant.
- Testing of agreed non-critical business processes (unless otherwise agreed by the affected participants).
- Accreditation, as there is no accreditation for SSC August 2026 release.
- There will be no tests associated with Flexible Trading Arrangements (FTA) aseXML schema changes. These changes will be present in the r47 schema, however they come into effect in November 2026. Subsequently, these changes will be tested in the FTA Release 2 Market trial which is scheduled to commence in September 2026.

Each participant is responsible for their own preparedness in respect of the above matters and should account for such items within their respective organisational testing programs.

4 Market trial approach

This section sets out the market trial strategy, comprising:

- The approach to the market trial,
- High-level test timeframes,
- Market trial readiness, and
- Assumptions underpinning the strategy.

4.1 Market trial approach

In accordance with the testing objective, scope and principles, the testing strategy for SSC August 2026 release provides participants with the necessary capability so that they can choose to undertake preparatory and testing activities ahead of the SSC August 2026 rule commencement.

This strategy comprises of the test tranches that will support the staged industry transition of the SSC Rule implementation and will be detailed in the specific test plan. Testing of all tranches will occur within the market trial period of June and July 2026. To enable this testing, a mock rule commencement date will be used to simulate “go-live”.

4.2 SSC Market trial schedule

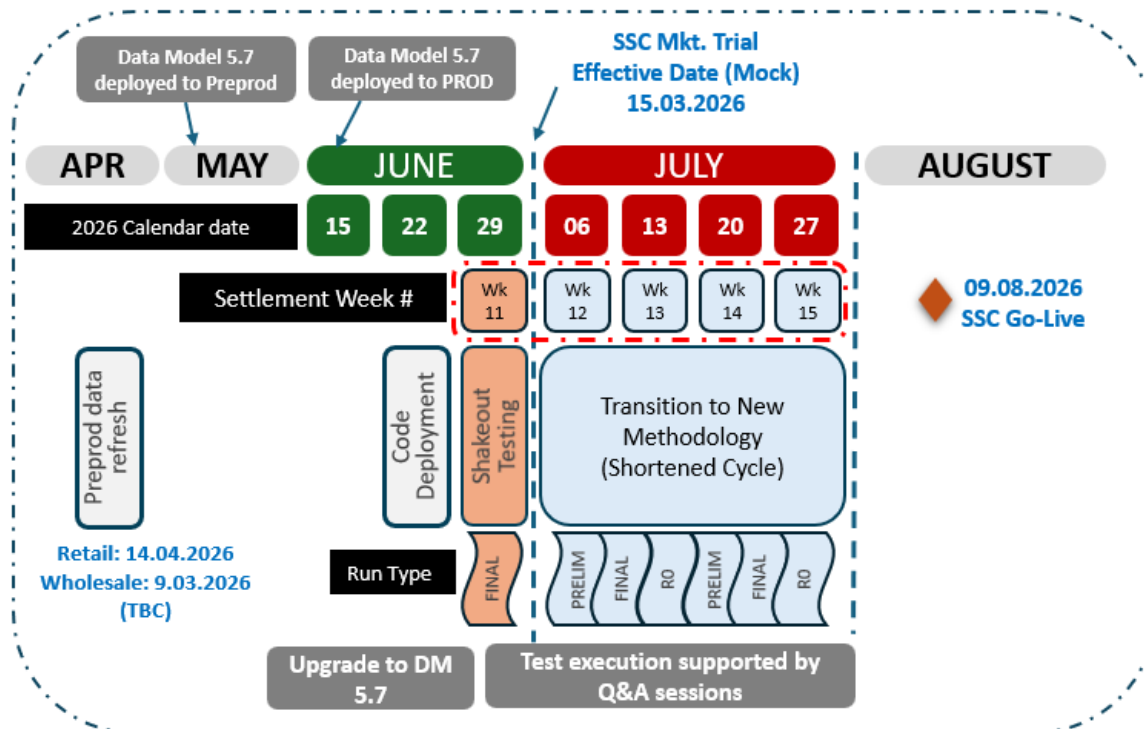
The SSC Market trial will be conducted over a 5-week period which is currently planned for 29 June 2026 to 31 July 2026. This will be confirmed in the final version of this document. The initial week of the Market Trial will be focussed on the environment shakedown and the AEMO team will run settlement week 11 of 2026 to baseline the environment. AEMO will also provide support for participants migrating to the new versions of the data model and aseXML schema.

The second week of the Market trial will simulate the SSC go-live date in Pre-Production and settlement week 12 of 2026. This will be the first settlement week of the Market Trial with a simulated shortened settlement cycle and will result in the production of the first R0 revision.

The remaining weeks of the Market trial will cover settlement weeks 13 to 15 and will simulate the further, progressive shortening of the settlement cycles. Prelim, Final and R0 revisions will be produced for each of these settlement weeks in the Market trial.

The full test schedule (which will include the dates that Prelims, Final and R0s will be created) will be provided in the SSC Market Trial Test Plan and via the ITWG.

Figure 1 SSC Market Trial Schedule



4.3 Market trial readiness

Below are the pre-requisites for the commencement of the market trial:

1. Expression of Interest (EOI):

AEMO will seek EOI from participants before the commencement of the market trial via the ITWG group or SSC specific Industry engagement forums. This is sought in order to assess the number of potential participants that will be engaging in the market trial and to arrange Practitest training and access.

2. Environment Availability:

Pre-Production environment will be available to support the market trial with the required IT support in place.

3. Practitest Test Cases and Availability:

AEMO will develop test cases in Practitest for execution in the Market Trial, provide Participants with Practitest training and access to the Practitest test tool.

4. Data Model 5.7

Participants wishing to access the updated BILLINGCALENDAR and BILLINGRUNTRK tables will need to upgrade to Data Model 5.7 and subscribe to the new versions of the updated tables.

5. Cash Dashboard Access:

Participants wishing to access the new Cash Dashboard will need request access in Pre-Production from their Participant Administrator (PA). The access requirements can be found in the EMMS Technical Specification.

6. Preparation for the new Cash Dashboard:

Participants wishing to use Cash Dashboard during the Market Trial should familiarise themselves with the Dashboard functionality via relevant AEMO materials.

4.4 Assumptions

The following are the key assumptions underpinning the market trial strategy:

1. AEMO will provide and maintain its Pre-Production environment which will be used for the market trial period.
2. Any change that is linked to or deployed to support a procedural or technical specification change will ensure the procedure(s) or technical specification(s) are documented and approved prior to the commencement of the market trial.
3. As part of any changes to Pre-Production, AEMO will give notice to participants on outages or code changes and provide release notes for the changes.
4. AEMO will back-up and upload production data into the Pre-Production environment prior to the testing of any system changes. AEMO will communicate the details and dates of this activity to all participants as part of the market trial planning and in consultation with the Industry Testing Working Group (ITWG). The data refresh strategy covering both wholesale and retail will be part of the AEMO SSC August 2026 market trial plan.
5. AEMO will provide and upload agreed test cases for any AEMO coordinated testing activities to PractiTest¹ Testing Modules and provide PractiTest support during the market trial.
6. AEMO will perform all internal functional and non-functional testing prior to the release of any changes into Pre-Production for all SSC August 2026 changes that AEMO is coordinating.
7. Participants will register their interest in participating the market trial prior to their commencement, as will be detailed in the respective test plan.
8. Participants will perform internal testing prior to connecting to the AEMO Pre-Production environment.
9. Participants will have appropriately skilled resource capability for execution and support requirements during the market trial.
10. Participants will ensure that the appropriate access to AEMO's Pre-Production environment is in place to support their market trial requirements.
11. Participants will ensure that defined test data is prepared and available within their test environments for market trial and that this data is appropriately baselined and backed up.
12. AEMO will provide support to investigate and resolve issues or defects identified during the market trial.
13. All participants engaging in the market trial will use PractiTest as the central test management tool to execute test cases, undertake defect management and produce dashboard reporting.

¹ PractiTest is AEMO's test management tool.

Market trial approach

14. Results from the market trial may be used by participants as one factor in AEMO's and their own assessment of go-live criteria.
15. AEMO will support participants to resolve any connectivity issues within the Pre-Production environment.

5 Market trial principles

Market trial of multiple-party interactions requires cooperation between participants to be successful. The following key principles should guide all parties involved in the market trial:

1. **Market trial strategy alignment with SSC August 2026 release:** The market trial strategy will align with the SSC August 2026 rule commencements and deployment approach.
2. **Appropriate choice of testing type for each test tranche:** The type of market trial selected for each test tranche will be in keeping with the complexity, materiality and implementation timeframe of the system change. This is to ensure that the cost, time, and resources applied to testing are appropriate to the change. For example, simple industry testing is usually suitable for a minor change, as is a full market trial for a complex system change that affects large numbers of participants.
3. **Detailed test plans** will be developed by AEMO in consultation with the ITWG to support SSC August 2026 release testing activities, with the level of detail and involvement consistent with the type of testing being conducted.
4. **AEMO will provide timely and suitable test environments:** AEMO will facilitate participants testing their updated systems and processes against AEMO's electricity market procedures and systems updated for SSC August 2026 release.
5. **Adherence to the market trial strategy and associated test plans:** All parties participating in market trial must use their best endeavours to adhere to the market trial strategy and test plans – including meeting key dates, fulfilling entry criteria checklist, adhering to defect management guidelines and reporting guidelines.
6. **Appropriately skilled resource capability:** All parties participating in market trial must be appropriately resourced for the test planning and test execution effort.
7. **Scope limited to critical business processes:** Any coordinated testing that requires interactions between multiple parties will be limited to critical business processes, unless otherwise agreed by the impacted parties. For example, business processes that affect key transactions that support market continuity.
8. **Focus on SSC August 2026 market readiness and market trial objectives:** All parties participating in market trial should be committed to cooperating with each other and be prepared to be responsive and flexible when responding to events, in accordance with the relevant SSC August 2026 objectives.
9. **Market trial outputs will be a consideration in readiness assessments:** For each market trial tranche, the number, severity, and type of defects will be a contributing factor to the relevant readiness assessment along with the number of participants who took part in testing. This information will be considered by AEMO in its proceed and contingency decisions.
10. **Release notes** will be provided for each system detailing functionality and defects fixes applicable to the release.

6 Strategy implementation: market trial management

This chapter sets out how AEMO and participants will interact through the market trial period.

6.1 Industry Testing Working Group (ITWG)

The ITWG will coordinate and execute the market trial for SSC market reforms to:

- Engage in detail on SSC market trial matters, and
- Collaborate on the development of the detailed testing plans where required.
- Each participant will provide market test resources to be part of the ITWG for the duration of market trial preparation and execution activity. It is expected that those resources will be adequately skilled to meet the needs of the preparation activity.
- The ITWG will meet as required to drive the planning and preparation and execution process.

6.2 Test management tool

PractiTest will be used to manage the market trial, including test scenarios, test script development, test execution, test results, the tracking of test defects during all tranches and dashboard reporting.

PractiTest will be configured by AEMO with all required information and will be monitored and supported by AEMO. AEMO will provide one free dedicated license to each organisation. If any organisation requires additional licenses, AEMO will purchase on the organisations' behalf at a cost charged back to the organisation.

This tool is available over the internet and the link will be provided closer to the test commencement date and AEMO will provide training to participants on request.

6.3 Participant test registration

Each prospective participant will need to register with AEMO their intention to undertake market trial prior to the commencement of the market trial period. Test registration is required so that multi-party test scenarios can be planned and scheduled from an end-to-end perspective.

Registration requirements and templates will be included in the Test Plan. AEMO will prompt for test registration requests and may request participants to complete templates or checklists as part of the registration activities. Participants will need to register each role within the market that they are responsible for. Where they have multiple IDs for the one role, a single registration with all IDs is required.

All registration requests and queries for market trial should be sent through using the NEM Reform inbox:

nemreform@aemo.com.au



Each Registration will be given two login IDs with additional logins available dependant on the number of participants engaging in the testing activities.

6.3.1 Participant ID and roles

Participants will detail which participant roles and IDs they will be testing under as part of their Test Registration.

6.4 Communication and status reporting

Commencement of status reporting will be aligned with the test execution for market trial. Commencement of market trial Q&A sessions will align with test execution period.

Table 2 describes how the progress of market trial will be monitored and report. Communications and status reporting will involve both AEMO and participants.

Table 2 Communications and status reporting

Frequency	Type	Responsible
Continuous	<ul style="list-style-type: none">• Updates in PractiTest for status of test cases and defects	AEMO and Participants
Daily	<ul style="list-style-type: none">• Status reports & traffic light reports• Readiness reports• Q&A meetings with Participants (frequency to be reviewed during the Market Trial)	AEMO
Milestone based	<ul style="list-style-type: none">• Milestone reports• Test Completion Reports	AEMO

6.5 Risk and issue management

Market trial related risks and issues with the potential to affect program readiness should be raised via the Implementation Forum.

7 Strategy implementation: market trial planning and preparation

The strategy sets out the approach and high-level timing for the SSC August 2026 market trial. To operationalise the strategy, more detailed test plans will be developed by AEMO in consultation with participants to set out the details associated with the market trial activities.

7.1 Test plan

As part of the preparation for testing, a series of workshops will be held by the ITWG to develop the SSC August 2026 Market Trial Plan covering the difference tranches of testing with the content and level of detail as appropriate for the type of testing to be conducted.

The Test Plan will align with key milestones and includes:

- Detailed scope of testing,
- Pre-requisite activities,
- Entry and exit criteria,
- Test tranches approach and timelines,
- Data management,
- Defect management, and
- Test reporting requirements.

Table 3 sets out the timetable for the development of the test planning documents and activities.

Table 3 Timeframes for SSC Market Trial planning and preparation

Test planning	ITWG Engagement	Draft	Final
Market Trial <i>Strategy</i> (doc)	Nov 2025	16 Jan 2026	27 Feb 2026
Market Trial <i>Plan</i> (doc)		27 Feb 2026	30 Mar 2026
Market Trial preparation activities (aligned with plan)	Mar 2026		



7.1.1 Test scenarios

The test plan market trial will document the test scenarios, data requirements, registered test participants and test calendar. The test calendar will include the test participant matrix, detailing who each participant will test with and when.

The ITWG will develop the test scenarios, scripts and calendar, by:

- Defining the test scenarios required for market trial, including identifying:
 - Scenario priority
 - Testing counterparties
 - Data requirements
- Defining and preparing the subsequent test scripts that will need to be executed.
- Defining the approach and timing of test script execution.

7.2 Test data

7.2.1 Data requirements

Data requirements will be developed during the test planning stage, and the approach to data management will be detailed in the respective Test Plans.

At a high-level:

- Data requirements will be identified for each test scenario as part of the test scenario development. These data requirements will be detailed in the Test Workbook.

Data identified will be mapped against every scenario in the Description field in PractiTest.

Participants are responsible for ensuring that any required data is available within their test environments for market trial test execution.

7.2.2 Data refresh

AEMO will undertake a data refresh prior to deployment to Pre-Production for market trial.

The next refresh of Pre-Production environments is scheduled for 14 April 2026 to 20 April 2026 (to be confirmed). The refresh will be sourced from production snapshots taken on the following dates which are also to be confirmed following the finalisation of the 2026 Preprod refresh strategy:

- Wholesale System Production snapshot is planned to be taken on the morning of 9 March 2026.
- Retail System Production snapshot is planned to be taken on the morning of 14 April 2025. This refresh will contain 6 months of meter data.

The details of the data refresh will be discussed and communicated via the ITWG in the lead up to go live. Participants are encouraged to align their Pre-Production data, if possible, as this will make aligning data between participants easier.



7.3 Market test environment: AEMO's Pre-Production

AEMO will prepare and maintain the single Pre-Production environment prior to the commencement of the market trial and throughout the test execution tranches for the duration of the market trial. All participants with valid participant IDs will have access to the Pre-Production environment for market trial. AEMO will back-up and refresh the data and support the Pre-Production environment.

All participant test environments will be maintained and managed by the respective participants.

7.3.1 Test support

Test support for the market trial period will be provided from 29 June 2026 and 31 July 2026 between 09:00 and 17:00 hrs (AEST) on business days.

8 Strategy implementation: market trial execution approach

The ITWG will monitor and manage all market trial execution activities. Participants are responsible for supplying their own teams for test execution for the duration of market trial.

8.1 Market test entry and exit criteria

The entry and exit criteria for each market trial period will be defined in the relevant Test Plans. Depending on the testing defined, the criteria are likely to be based on those listed below.

8.1.1 Entry criteria

Participants wanting to participate in the market trial are expected to have fulfilled entry criteria prior to the commencement of market trial. This may include but is not limited to the following criteria:

- Participant internal testing completed
- Pre-Production participant ID received for new participants (via registration), if relevant
- Connectivity testing complete
- Test data preparation (in line with test scripts/cases, i.e. roles and NMI ranges) is complete, if required
- Appropriately skilled resource capability available to execute and support testing.

AEMO will confirm the following:

- Internal AEMO testing has completed.
- Pre-Production environment being available.
- The relevant SSC August 2026 Market Trial Plan being completed, agreed and delivered to the ITWG.
- PractiTest is configured with all required test information and is accessible and useable by all testing participants.
- Registration of participants in the market trial with nominated role IDs to be used in testing.
- Testing participants have confirmed readiness (through the submission of completed entry criteria checklist).

8.1.2 Exit criteria

Exit criteria for the test execution period may include:

- Successful completion of all high-priority test scenarios
- No outstanding Severity 1 or Severity 2 defects
- Any open defects (Severity 3 or 4) have agreed resolutions or work around in place and published. Where appropriate and efficient, AEMO can discuss options for resolving a defect/s with the ITWG

- Final Test Summary Report completed
- The overall result market trial will be one factor included in the assessment of the overall market readiness for implementation.

8.2 Test scenario and script execution

Test execution will be undertaken as follows:

- Respective test plans are created in PractiTest Test Execution modules for all participants to facilitate testing
- Tests scenarios and scripts that are in scope for participants will be set up in their respective test plans of PractiTest Test execution module
- Execution of the testing will be undertaken according to execution calendar made available as part of the preparation activities
- Informal testing may occur between participants, however reporting of the market trial will be based on the defined execution calendar
- Test execution information will be updated in PractiTest as it occurs, i.e. in as close to real time as possible. This will include test progress, status and data used
- An audit trail of test execution can be undertaken by participants. This includes capture of positive results to prove that a test met expected results. For example, participants can use screen shot or test output as evidence of their test results. Where applicable, this information will be maintained in PractiTest. Where this is not applicable, e.g. particularly large files, participants should store the required information accordingly, so it can be referenced as positive proof of testing.
- To assist in defect resolution, participants should capture negative results in PractiTest against the defect. In the case of sensitive information, please keep the information so AEMO can work through troubleshooting, if required.

8.2.1 Test status

After running each test script, participants will update the test script status in PractiTest as below:

- Unexecuted
- In progress
- Blocked
- Failed
- Passed
- Not applicable

AEMO will use these test statuses to generate the status traffic light reports and circulate prior to the daily test status meetings.



8.2.2 Test metrics

Test measurement during market trial will be based on but not limited to the following metrics:

- Number of test scenarios executed versus the number planned
- Number of passed test scenarios versus test scenarios executed
- Number of failed test scenarios versus test scenarios executed
- Number of test scenarios blocked versus test scenarios planned
- Number of test scenarios deferred/not applicable versus number planned
- Outstanding defects including the impact and agreed date of resolution.

These metrics will be reported as appropriate in the test status reports which AEMO will generate and circulate prior to the daily test status meetings.

8.3 Daily process

The daily process to be adopted during each market trial period will be detailed in their respective Test Plans, including:

- Frequency of daily test status meetings (number of meetings per day – which may be adjusted as testing execution progresses)
- Number and scheduled time/s of daily test status meetings
- Meeting attendees (one meeting for all attendees or multiple meetings with targeted attendees)
- Meeting agenda templates.

To prepare for the scheduled meetings:

- Participants will be asked to update PractiTest prior to the meeting
- AEMO will generate and circulate the test status report and status traffic light report prior to the meeting.

The daily test status meeting agenda will include:

- Confirming attendance
- Test execution progress:
 - Review planned against actual progress for test execution. Discuss exceptions against planned execution
 - Confirmation of readiness to commence scheduled tests
- Review defect status – outstanding defects

8.4 Test management activities

Table 4 shows the activities which will occur during market trial and who is responsible for them.



Table 4 Test management activities

Activities	Description	Timing	Responsibility
Prepare tests	Configure PractiTest with test scenarios and test scripts.	Prior to the commencement of test execution	AEMO
Identify data	Identify data sets for each test scenario, enter in PractiTest and confirm with testing partners.	Prior to the commencement of test execution	Participants, AEMO may assist if required
Execute tests	Individual testers to perform test execution and capture actual results of testing in PractiTest.	Daily	Participants
Update progress	Progressively update the status of each script tested in PractiTest.	Daily	Participants
Raising defects	Raising defects from failed scripts or any other root cause in PractiTest.	Real time immediate as soon as the script has failed.	AEMO and Participants
Managing defects	Review defects logged in the PractiTest to identify major defects and determine the impact of those defects.	Daily	AEMO and Impacted Participants
Retesting defects	Retesting defects once they are available to testers is a priority.	Defect retests are to be completed prior to commencing new scripts.	AEMO and Participants
Test tranche entry	Complete entry criteria checklist	Prior to the commencement of test execution	AEMO and Participants
Test tranche exit	Complete exit criteria check	At the completion of test execution	AEMO and Participants
Test status meetings	Test status meeting to be attended by test representatives from all participants to discuss progress, issues and defects.	Daily (or as detailed in the Test Plan)	AEMO and Participants

9 Strategy implementation: defect management

Market trial defect management will be a collaborative effort, principally involving AEMO's and participants' testing teams, development teams and business analysis teams. There will, at times, be a need to consult other projects' team members for advice and assistance on the resolution of defects. Defect management will be managed entirely within PractiTest.

The objective of defect management is to resolve all defects within the project lifecycle. However, this objective must be balanced against other project objectives, such as achieving the schedule and the system impact and priority of the defect (discussed below). The acceptable level of defects within each stage of testing is typically defined as part of the 'exit criteria' for that stage.

AEMO will manage and report on all defects identified during test execution. Where it is determined that it is not an AEMO defect, AEMO will coordinate with participants to obtain the status of the defect.

A template will be provided to assist participants with the creation of defects.

9.1 Defect management approach

9.1.1 Raising defects

Defects raised during market trial will be captured in PractiTest, with the following information:

- Description of defect
- The test scenario and/or test script associated with the defect
- Who detected it and the data it was detected
- Defect owner (entered after gaining agreement between testing counterparties as to who owns the defect)
- Target fix date (entered by defect owner)
- Defect severity
- Defect priority
- Defect status
- Defect root cause (entered by defect owner)

For SSC implementation, the term "defect" is used broadly to include defects that would ordinarily fall outside of a narrow "IT" definition. For example, information could be captured regarding lack of required support. This affects test execution from a timing perspective.

- Testing may indicate that an automated business process needs manual intervention to work correctly and given constrained timings an automated fix cannot be developed and tested in time for go-live. Information such as this can feed into the deployment/cutover planning for go-live.

As a general principle, any information that occurs during market trial and assists with risk mitigation for the “go-live” solution may be captured.

Defect statuses and progress on defect fixes will be discussed in the daily test status meetings.

9.1.2 Defect triage

Defect triage occurs during the daily test status meetings. Test scenarios or scripts that are blocked with critical or high priority defects will be discussed in the meetings. The defect owners and the target fix time will be agreed for critical and high priority defects blocking test execution.

Participants and AEMO should review defects frequently on a daily basis and update the target fix date/time in PractiTest for everyone’s reference.

Figure 1 contains a workflow of the Testing issue triage process.

9.1.3 Defect escalation

All open defects will be discussed in the daily test status meetings. If a critical/high priority defect can’t be resolved within the agreed timeframes, it can be escalated in the daily test status meetings. If required, AEMO will arrange a separate defect triage meeting with the relevant participants to see that the defect is resolved quickly to progress test execution.

9.1.4 Defect severity and prioritisation

Defects will be classified according to severity and where there are multiple within a severity, they will be addressed based on the priority by the participant test leads in consultation with other affected participants, as described in Table 5 and Table 6. Priority will indicate the degree to which the defect affects both the system capability, testing execution and the overall project. Priority is determined by assessing probability of system and the business impacts.

Table 5 Defect severity classification

Severity	Definition
1- Showstopper	Defect is considered critical to business operations and/or testing. Core business and project impact.
2-Major	Defect is considered high impact to the business operations and/or testing. However, core business processes are still able to be completed (possibly via workarounds, etc.) and some testing is still able to continue.
3-Moderate	Defect is considered moderate impact to the business operations and/or testing. Core business processes are unaffected, and workarounds available, with testing still able to continue.
4-Minor	Defect is considered low impact to the business operations and/or testing. Core business processes are unaffected, and testing is still able to continue.

Table 6 Defect severity classification

Priority	Definition
1- Blocker	Entire functionality is blocked, and no testing can be conducted. Fix/resolution turnaround time best endeavour effort in first 4 hours or provide update on impact.
2-Highest	Defect is considered high impact to testing; multiple tests are blocked/failed due to the defect and no workaround is available

Priority	Definition
3-High	Defect is considered high impact to testing one or more tests can be linked to the defect, but workaround is available, and testing is still able to continue.
4-Medium	Defect is considered moderate impact to testing with one or more tests can be linked to the defect, but workaround is available and none of these tests are currently a priority.
5-Low	Defect is considered low impact to testing, no tests are failed or blocked due to this defect.

Post triage and acceptance of a defect, a resolution date will be added and published in the daily status report for all identified defects.

9.1.5 Defect management status

Table 77 shows the valid defect management statuses to be selected in PractiTest.

Table 7 Defect management status

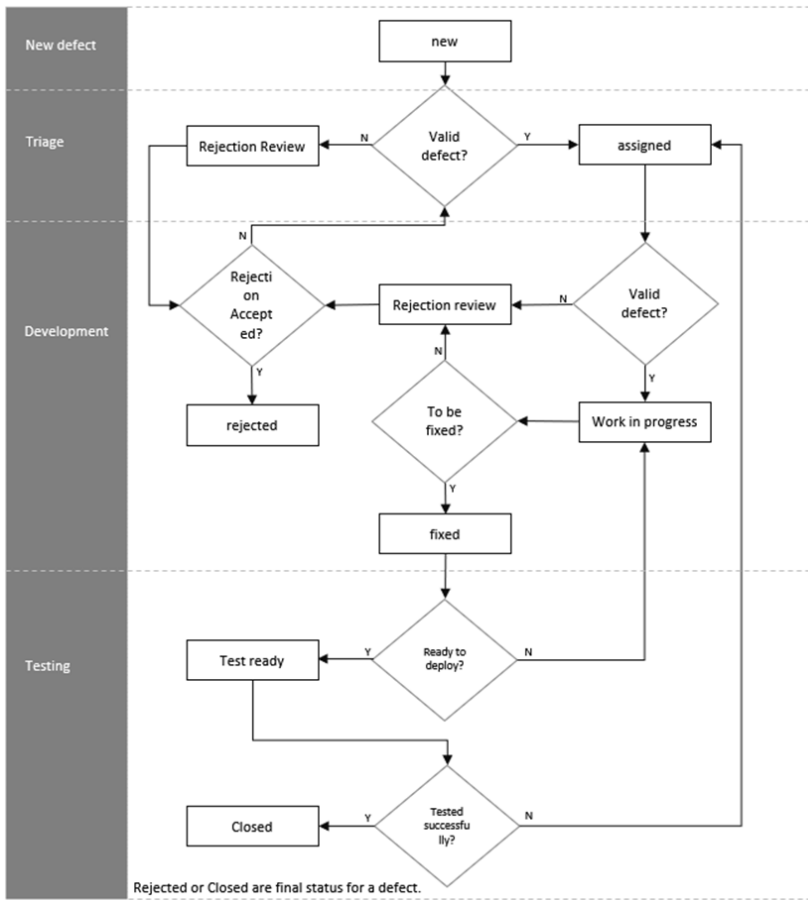
Status	Definition
New	Initial defect raised but will require a triage to determine if further analysis is required and whether it is a true defect as such to move to an assigned status.
Assigned	Defect will be assigned to the appropriate development team to be addressed further assessed and progressed.
Work in Progress	PractiTest item that is considered valid to be set to 'Work in Progress' to be fixed by development. This status means, a team is working on the PractiTest item (analysis or fixing)
Rejection Review	After Triage or review by developer the defect is not considered valid the defect will be assigned to the status of 'Rejection Review' and assigned to the participant who raised the defect to accept rejection or update defect to allow it to be 'assigned'.
Rejected	PractiTest item that is in a 'Rejection Review' status can be progressed to this state. If a participant accepts a defect is not valid, they can confirm the acceptance of the defect by changing the status to 'Rejected'.
Fixed	Once PractiTest item has been fixed and unit tested by developer the status is set to 'fixed'. This indicates the release of the fix is ready for deployment to a test environment.
Test Ready	Once the fix is released to test environment successfully the status is set to 'Test Ready' and assigned to the participant who raised it.
Closed	If the participant (defect originator) is satisfied that the testing of the defect is successful they should update the defect

9.1.6 Defect process flow

Figure 2 shows the defect management process throughout the various defect management statuses of the defect lifecycle from its inception through to its closure.



Figure 2 Defect management cycle



9.1.7 Defect cause

Defect root cause will be updated in PractiTest once the defect cause is identified. This will help with the defect metrics to identify the impacted area of the issues/defects identified in the testing. Table 8 shows the available defect causes and their descriptions.

Table 8 Defect cause

Defect Cause	Definition
Design	The design of the process does not meet the requirements specified. Defect may include examples, algorithm (incorrect calculation), error handling, creation/release of object or memory, decision logic error, loop control, procedure call, failing to validate data values before being used.
Configuration	The intended outcome of the configuration is not meet.
Data	There are system data issues for the process that may prevent test completion.
Requirements	Unclear or incorrect requirement, Functional and Business specification documentation.
Infrastructure/Hardware	Defect is not in the object being tested but, in the test, set up, for example the wrong configuration or version control of platform, operating system, browser, hardware or networking, system is down, or the environment is down.

9.2 Suspension criteria and resumption requirements

AEMO in consultation with the ITWG will determine if a complete or partial suspension of testing is required during market trial and will also determine when testing will resume. Suspension and resumption criteria and actions are described below.

9.2.1 Suspension criteria

Complete or partial suspension of testing may be required if:

- High density of defects is open impacting the number of test cases that can be executed
- High severity (i.e. showstopper) or combination of defects open
- Significant change to specifications (delaying release of software to the Pre-Production environment)
- Quality of software (rated by number of test cases failing)

If these circumstances arise, the following actions will be taken:

- AEMO will make a recommendation to suspend the test activities in consultation with ITWG
- AEMO will advise the participants of the potential delays due to the test suspension, and the impact of defect(s) concerned
- AEMO and the ITWG will support and coordinate the development and test efforts to resolve the defects raised.

9.2.2 Resumption criteria

Test resumption can occur after the issues that caused the suspension of testing have been resolved. If these circumstances arise, the following actions will be taken:

- AEMO will inform the testing participants of the successful deployment of the defect fix(s) and its successful verification
- AEMO will inform the testing participants that the test environment is in a suitable condition to resume the suspended testing
- AEMO in consultation with the participant who raised the defect, will inform the participants of the impact(s) of the defect fix on the previously executed test cases and suggest if any re-execution must be done.

Glossary

This document uses terms that are defined in the NER, which are intended to have the same meanings unless otherwise stated.

TERM	DEFINITION
AEMC	Australian Energy Market Commission.
AEMO	Australian Energy Market Operator.
FRMP	Financially responsible market participant.
FTA	Flexible Trading Arrangements (initiative).
Industry testing	Informal, uncoordinated testing by participants in AEMO's IT environments. Self-testing of functionality such as connectivity, and/or coordinated multi-party testing of functional scenarios.
Market Trial	Formal testing by participants, coordinated by AEMO in AEMO's IT environments.
NEM	National electricity market.
NER	National electricity rules.
NMI	National metering identifier.
SME	Subject Matter Expert.
SSC	Shortening the Settlement Cycle (initiative).
UAT	User Acceptance Testing