

SWITCH HOLD FOR DEFERRED PAYMENT PLANS

Retail Market
Guide Updates

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RULE AND RETAIL MARKET GUIDE

- PUCT SUBST. R. 25.480
 - Bill Payment and Adjustment
 - Effective June 1, 2011
- Retail Market Guide 7.17
 - Operational detail on application of the rule
- Retail Market Guide Section 9, Appendix J1
 - Switch Hold file details

PLACEMENT OF DPP SWITCH HOLD

- Retail Electric Provider controls application of DPP Switch Hold to the customer account
 - Must be compliant with PUCT SUBST. R. 25.480
 - Customer agrees to Deferred Payment Plan as set forth within the rule
 - Customer agrees to Level Payment Plan that includes deferred payment amounts as set forth within the rule
- REP creates individual MarkeTrak issue for each ESIID
 - *Other* subtype
 - Include “71711” in the ISA Number Field
 - Populate ESIID field
 - Assign issue to appropriate TDSP

PLACEMENT OF DPP SWITCH HOLD

- TDSP will take one of two actions
 - Place ESIID on DPP Switch Hold; or
 - Reject Issue due to:
 - Incorrect MarkeTrak Issue subtype
 - Incorrect ISA Number or ISA Number not populated
 - Incorrect ESIID or ESIID not populated
 - Submitting CR is not ROR
- If a MVI or SWI is already scheduled in TDSP systems prior to DPP Switch Hold request being placed on the ESIID
 - TDSP may Complete Unexecutable the existing MVI or SWI using reason code “T018” in the 814_28 with “SWITCH HOLD” in the text description field

REMOVAL OF DPP SWITCH HOLD

- By noon each Retail Business Day the REP may submit a MarkeTrak issue to the TDSP to remove the DPP Switch Hold from the ESIID
 - Individual MarkeTrak issue for each ESIID to be removed
 - *Other* subtype
 - Include “71712” in the ISA Number Field
 - Populate ESIID field
 - Assign issue to appropriate TDSP

REMOVAL OF DPP SWITCH HOLD

- TDSP will take one of two actions
 - Accept the issue and remove the DPP Switch Hold
 - By 8:00pm the same Retail Business Day if received by 1:00pm
 - By 8:00pm the next Retail Business Day if received after 1:00pm
 - Reject Issue due to:
 - Incorrect MarkeTrak Issue subtype
 - Incorrect ISA Number or ISA Number not populated
 - Incorrect ESIID or ESIID not populated
 - Submitting CR is not ROR

REMOVAL OF SWITCH HOLD

- Move-out
 - TDSP will remove Switch Hold from an ESIID upon completion of a MVO request
- Continuous Service Agreement
 - Upon receipt of a MVO to CSA for an ESIID under a Switch Hold
 - TDSP shall remove the Switch Hold upon completion of the MVO request
 - TDSP shall then complete the CSA MVI

SWITCH HOLD LISTS

- TDSP will make available two lists of accounts with current Switch Holds
 - Master List of all ESIIDs with Switch Holds
 - Available via FTP or Secure Web Portal
 - Updated and posted each day no later than 9:00am
 - REP Specific List
 - Available via FTP or Secure Web Portal only for the targeted REP
 - Updated and posted each day no later than 9:00am
- Both lists comply with the naming and content specifications outlined in RMG Section 9, Appendix J1

ENROLLMENT REJECTS DUE TO SWITCH HOLD

■ Switch Reject

- TDSP shall reject by sending an 814_04 with reason code “A13” and “SWITCH HOLD” in the text description field
- Requesting REP will receive notification of rejection in the 814_05 with reason code “A13” and “SWITCH HOLD” in the text description field

■ Move-in Reject

- TDSP shall reject by sending an 814_04 with reason code “A13” and “SWITCH HOLD” in the text description field
- Requesting REP will receive notification of rejection in the 814_05 with reason code “A13” and “SWITCH HOLD” in the text description field

REMOVAL OF INVALID SWITCH HOLD

- If customer believes that rejection of MVI was in error, due to Switch Hold not being applicable to that customer
 - REPs and TDSPs will utilize the existing MarkeTrak process for removal of invalid Switch Holds
 - Refer to RMG 7.17.3.3 for full details

QUESTIONS



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