* 1. MP9 Use Case- Changes to *Inadvertent Losing* Workflow
     1. Description:
* Background:
  + Task Force Participants have requested that on Inadvertent Issues, the workflow and validations be improved to ensure that the “Responsible MP” is reflected as the party that is expected to provide the next update to move the issue towards resolution
  + These changes could be achieved with a new state of agreement, separate from “Send to Losing CR”.
  + This will also require some changes to the current Inadvertent Losing workflow
    - Specifically the “Agree” transition
    - Role of “Send to Losing CR” transition will be reduced
* Problems With Current Workflow
  + The transition “Send to Losing CR” is currently used alongside agreement from the Gaining CR, but does not always *necessarily* indicate agreement from the Gaining CR. Therefore, the TDSP is often left having to ask for specific agreement to the IAG in instances where the transition is used, but the Gaining CR’s comments are unclear.
* New Functionality
  + The Losing CR will no longer be able to send the issue straight to the TDSP if “Send to Losing CR” is chosen. This transition will only be used for information requests from the Gaining CR. The Gaining CR must select “Agree” to give the TDSP a clear signal that the Gaining CR is now willing to allow for the Losing CR to regain the premise, and accept all fees related to the return of this issue. This transition in the current workflow has been a source of confusion in the past, as it does not necessarily indicate agreement on the part of the Gaining CR.
    1. New Fields

1. GUI:

* New Transitions
  + “Agree”
* Changes From Current Workflow
  + “Send to Losing CR” Transition
    - Used only for Inquiry by Gaining CR
    - Losing CR no longer able to transition to TDSP directly following this transition
      * Must return to Gaining CR to obtain agreement, or;
      * May close issue as normal
  + “Send to TDSP” Transition
    - This transition will be eliminated for this subtype
      * Issue will transition directly to TDSP following agreement from Gaining CR

1. Mass Update

* Users will need to be able to use the following transitions on multiple issues, if applicable
  + “Agree”
    1. All issues selected must be in the “In Progress (Gaining CR)” state

1. API
   * 1. Pre-Conditions:

* MarkeTrak system is available and processing issues
  + 1. Success Guarantee
* Issue is successfully created and able to be transitioned to a resolution.
  + 1. Trigger:
* User creates “Inadvertent Losing” Issue
  + 1. Main Success Scenario: Losing CR requests permission to regain a premise, Gaining CR agrees, TDSP clears system for backdated MVI, Losing CR submits MVI, issue closes

1. Losing CR selects “Inadvertent Losing” from MarkeTrak Submit Tree
2. User selects “OK” to create the issue
3. Premise Type is populated
4. MarkeTrak Issue is created and ERCOT provides applicable information
   1. No change from current process
5. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
6. Gaining CR user selects “Begin Working”
7. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
8. Gaining CR selects “Agree”
9. The issue is in a state of “New (TDSP)” with the TDSP as Responsible MP
10. The TDSP selects “Begin Working”
11. The issue is now in a state of “In Progress (TDSP)” with the TDSP as Responsible MP
12. TDSP selects “Ready to Receive”
13. The issue is now in a state of “New (Losing CR Submit)” with the Losing CR as the Responsible MP
14. Losing CR clicks “Begin Working”
15. Issue is in a state of “In Progress (Submit Regaining)” with Losing CR as Responsible MP
16. Losing CR clicks “Provide Regaining BGN02”
17. Issue is in a state of “Regaining Transaction Submitted (PC)” with the Losing CR as Responsible MP
    1. Once the regaining transaction has been successfully sent to the Market by (Losing/Original CR), Siebel will automatically:
       1. Check Regaining Transaction Siebel Status every 30 minutes using the BGN 02 from the new initiating transaction
       2. Update the issue with the current Regaining Transaction Siebel Status
       3. Assign the state of “Complete” with the Submitting MP as the Responsible Party once the Regaining Transaction Siebel Status is Complete.
       4. Main Success Scenario: Losing CR requests permission to regain a premise, Gaining CR chooses “Send to Losing CR” requesting additional info, Losing CR provides info, Gaining CR agrees, TDSP clears system for backdated MVI, Losing CR submits MVI, issue closes
18. Losing CR selects “Inadvertent Losing” from MarkeTrak Submit Tree
19. User selects “OK” to create the issue
20. Premise Type is populated
21. MarkeTrak Issue is created and ERCOT provides applicable information
    1. No change from current process
22. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
23. Gaining CR user selects “Begin Working”
24. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
25. Gaining CR selects “Send to Losing CR”
    1. Comments required
26. Issue is in a state of “New (Losing CR)”
27. Losing CR selects “Begin Working”
28. Issue is in a state of “In Progress (Losing CR)”
29. Losing CR selects “Send to Gaining CR”
    1. Comments required
30. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
31. Gaining CR user selects “Begin Working”
32. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
33. Gaining CR selects “Agree”
34. The issue is in a state of “New (TDSP)” with the TDSP as Responsible MP
35. The TDSP selects “Begin Working”
36. The issue is now in a state of “In Progress (TDSP)” with the TDSP as Responsible MP
37. TDSP selects “Ready to Receive”
38. The issue is now in a state of “New (Losing CR Submit)” with the Losing CR as the Responsible MP
39. Losing CR clicks “Begin Working”
40. Issue is in a state of “In Progress (Submit Regaining)” with Losing CR as Responsible MP
41. Losing CR clicks “Provide Regaining BGN02”
42. Issue is in a state of “Regaining Transaction Submitted (PC)” with the Losing CR as Responsible MP
    1. Once the regaining transaction has been successfully sent to the Market by (Losing/Original CR), Siebel will automatically:
       1. Check Regaining Transaction Siebel Status every 30 minutes using the BGN 02 from the new initiating transaction
       2. Update the issue with the current Regaining Transaction Siebel Status
       3. Assign the state of “Complete” with the Submitting MP as the Responsible Party once the Regaining Transaction Siebel Status is Complete.
       4. Extension Scenario: Losing CR requests permission to regain a premise, Gaining CR chooses “Send to Losing CR” requesting additional info, Losing CR provides info, Gaining CR chooses “Unexecutable”, issue closes
43. Losing CR selects “Inadvertent Losing” from MarkeTrak Submit Tree
44. User selects “OK” to create the issue
45. Premise Type is populated
46. MarkeTrak Issue is created and ERCOT provides applicable information
    1. No change from current process
47. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
48. Gaining CR user selects “Begin Working”
49. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
50. Gaining CR selects “Send to Losing CR”
    1. Comments required
51. Issue is in a state of “New (Losing CR)”
52. Losing CR selects “Begin Working”
53. Issue is in a state of “In Progress (Losing CR)”
54. Losing CR selects “Send to Gaining CR”
    1. Comments required
55. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
56. Gaining CR user selects “Begin Working”
57. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
58. Gaining CR selects “Unexecutable”
59. Issue is in a state of “Unexecutable (PC)” with the Losing CR as Responsible MP
60. Losing CR selects “Accept”; issue is closed