MP36: Add SMRD and MVI priority for Regaining Transaction

Description:

* Background:
  + Task Force Participants have requested that on Inadvertent issues, the scheduled date and MVI type be reflected within the issue.
  + The *Inadvertent Gaining,* *Inadvertent Losing and Customer Rescission* subtypes would be affected.
  + Additional Fields will be added
    - Regaining BGN Priority Code
      * Will display priority code as populated within the Regaining 814\_16
    - Regaining BGN Requested Date
      * Will display the Losing CR’s requested date of reinstatement as populated within the Regaining 814\_16 (as opposed to the 814\_04 from the TDSP)
    - “Regaining Transaction Submit Date” field will be modifiedNo longer will the Losing CR populate this date upon entering Regaining BGN information
    - Siebel will capture the submit date once the regaining BGN is sent, and automatically populate this field

New Fields

1. GUI
   1. Regaining BGN Priority Code
      1. min/max length – 0/3
      2. type: numeric
      3. Permitted values and definitions
         1. numeric
      4. Default value- blank
      5. Output format- numeric
      6. Screen location- Issue
      7. Read Only- Yes
      8. Updateable- Yes (only if Regaining BGN field is repopulated)
      9. Automatically populated- Yes
      10. Proprietary- All MPs involved
      11. Field Screen Title- Regaining BGN Priority Code
      12. Transitions Enabled – once Losing CR has submitted Regaining BGN02
      13. Transitions Displayed “Regaining Transaction Submitted (PC)” state
      14. Workflows Involved- *Inadvertent Gaining; Inadvertent Losing; Customer Rescission*
   2. Regaining BGN Requested Date
      1. min/max length – required/standard date formatting
      2. type: date
      3. Permitted values and definitions- valid date
      4. Default value- blank
      5. Output format- standard date format
      6. Screen location- Issue
      7. Read Only- Yes
      8. Updateable- Yes (only if Regaining BGN field is repopulated)
      9. Automatically populated- Yes
      10. Proprietary- All MPs involved
      11. Field Screen Title- Regaining BGN Requested Date
      12. Transitions Enabled – once Losing CR has submitted Regaining BGN02
      13. Transitions Displayed “Regaining Transaction Submitted (PC)” state
      14. Workflows Involved- *Inadvertent Gaining; Inadvertent Losing; Customer Rescission*
2. API

Modified Fields

1. GUI
   1. Regaining Transaction Submit Date
      1. min/max length – no change
      2. type: no change
      3. Permitted values and definitions- no change
      4. Default value- no change
      5. Output format- no change
      6. Screen location- no change
      7. Read Only- no change
      8. Updateable- Yes (only if Regaining BGN field is repopulated)
      9. Automatically populated- Yes
      10. Proprietary- no change
      11. Field Screen Title- no change
      12. Transitions Enabled – once Losing CR has submitted Regaining BGN02
      13. Transitions Displayed no change
      14. Workflows Involved- *Inadvertent Gaining; Inadvertent Losing; Customer Rescission*

Pre-Conditions:

* MarkeTrak system is available and processing issues

Success Guarantee:

* Issue is successfully created and able to be transitioned to a resolution.
* A regaining BGN is populated into the MarkeTrak issue and Siebel is able to identify the BGN as having been submitted

Trigger:

* User creates *Inadvertent Gaining,* *Inadvertent Losing* or *Customer Rescission* Issue

Main Success Scenario: (Inadvertent Losing) 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. Losing CR populates all required information
    1. Proposed Regain Date
    2. Regaining BGN 02
18. 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. Identify the Regaining BGN and populate the Regaining BGN Priority Code/Requested/Submit Date fields
       2. Check Regaining Transaction Siebel Status every 30 minutes using the BGN 02 from the new initiating transaction
       3. Update the issue with the current Regaining Transaction Siebel Status
       4. Assign the state of “Complete” with the Submitting MP as the Responsible Party once the Regaining Transaction Siebel Status is Complete.

Main Success Scenario: (Inadvertent Gaining) Gaining CR requests that the Losing CR regain a premise, Losing CR agrees, TDSP clears system for backdated MVI, Losing CR submits MVI, issue closes

1. CR1 (Gaining CR) will select the “ IAG – Inadvertent Gaining” sub-type from the MarkeTrak Submit Tree within MarkeTrak via GUI.
2. User selects “OK” to create the issue
3. CR1 (Gaining CR) will enter all required information:
   1. ESIID
   2. Original Tran ID - The original tran id of the Gaining CR’s enrollment. (BGN02 of the 814\_01/814\_16).
4. By selecting **OK**, the Premise Type and Siebel Status/Sub-status will be populated on the issue and it enters ERCOT’s queue in a state of ***New*** and is visible only by the Submitting CR and ERCOT. The Submitting CR has the option to **Withdraw** the issue at this point.
5. ERCOT will select **Begin Working** and provide the Gaining CR Start Date, if the Gaining CR is still the rep of record (Gaining CR ROR), to assign CR2 (Losing/Original CR) and TDSP. ERCOT will then select “**OK**” to move the issue to CR2 (Losing/Original CR).
6. At this point, the Submitting CR can no longer **Withdraw** the issue.
7. CR2 (Losing/Original CR) will select **Begin Working** and Issue details and Investigate Market Conditions to determine the appropriate regain date.
8. The TDSP will select **Begin Working**, investigate the issue details, then select **Ready to Receive** to send the issue back to CR2 (Losing/Original CR).
9. CR2 (Losing/Original CR) will select **Begin Working**, then select **Provide Regaining BGN 02**. CR2 (Losing/Original CR) will provide the, **BGN02** and **Transaction Date** for the submitted transaction, then select “**OK**”. **Transaction Date** will be the same as the proposed regain date, as opposed to the **Regaining Transaction Submit Date**.
10. 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. Identify the Regaining BGN and populate the Regaining BGN Priority Code/Requested/Submit Date fields
       2. Check Regaining Transaction Siebel Status every 30 minutes using the BGN 02 from the new initiating transaction
       3. Update the issue with the current Regaining Transaction Siebel Status
       4. Assign the state of “Complete” with the Submitting MP as the Responsible Party once the Regaining Transaction Siebel Status is Complete.
11. Main Success Scenario (Customer Rescission): Gaining CR submits issue, Losing CR agrees to regain, Losing CR submits BDMI, reinstates ESIID one day following DOL
12. Gaining CR selects “Customer Rescission” from Submit Tree
13. Gaining CR populates comments (optional), Original Tran ID, ESIID, and selects “OK”
14. ERCOT validates ESIID, submission timeframe and valid originating transaction.
15. Once validation is complete, MarkeTrak Issue is created and ERCOT updates the issue with the following information:
    1. Losing CR Name and Duns
    2. TDSP Name and Duns
    3. Gaining CR ROR = Y or N
    4. Gaining CR Start Date
    5. Regain Date – auto populated by ERCOT. Calculation is Gaining CR Start Date plus 1 calendar day.
16. MarkeTrak issue is assigned to the state of “New (Losing CR)” with the Losing CR as the Responsible Party
17. Losing CR user selects “Begin Working”
18. MarkeTrak issue is assigned to the state of “In Progress (Losing CR)” with the Losing CR as the Responsible Party
19. Losing CR selects “Send to TDSP”
20. Issue is in a state of “New (TDSP)” with TDSP as Responsible MP
21. TDSP selects “Begin Working”
22. Issue is in a state of “In Progress (TDSP)” with TDSP as Responsible MP
23. TDSP selects “Ready to Receive”
24. Issue is in a state of “New (Losing CR Submit)” with the Losing CR as Responsible MP.
25. Losing CR selects “Begin Working”
26. Issue is in a state of “In Progress (Submit Regaining)” with the Losing CR as Responsible MP
27. Losing CR selects “Provide Regaining BGN02”
28. Losing CR populates all required information
    1. Transaction Date
    2. Regaining BGN 02
29. Issue is in a state of “Regaining Transaction Submitted (PC) with the Gaining (Submitting CR) as Responsible MP
30. Once the regaining transaction has been successfully sent to the Market by (Losing/Original CR), Siebel will automatically:
    1. Identify the Regaining BGN and populate the Regaining BGN Priority Code/Requested/Submit Date fields
    2. Check Regaining Transaction Siebel Status every 30 minutes using the BGN 02 from the new initiating transaction
    3. Update the issue with the current Regaining Transaction Siebel Status

The issue will move to a state of “Complete” with the Submitting MP as the Responsible Party once the Regaining Transaction Siebel Status is Complete.