* 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

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 (Losing CR)’ with the Losing CR as the responsible party.
10. Losing CR selects Begin Working and the issue transitions to ‘In Progress (Losing CR)’
11. Losing CR selects ‘Send to TDSP’ and provides required Proposed Regain Date and Comments.
12. The issue is in a state of “New (TDSP)” with the TDSP as Responsible MP
13. The TDSP selects “Begin Working”
14. The issue is now in a state of “In Progress (TDSP)” with the TDSP as Responsible MP
15. TDSP selects “Ready to Receive”
16. The issue is now in a state of “New (Losing CR Submit)” with the Losing CR as the Responsible MP
17. Losing CR clicks “Begin Working”
18. Issue is in a state of “In Progress (Submit Regaining)” with Losing CR as Responsible MP
19. Losing CR clicks “Provide Regaining BGN02”
20. 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
21. Losing CR selects “Inadvertent Losing” from MarkeTrak Submit Tree
22. User selects “OK” to create the issue
23. Premise Type is populated
24. MarkeTrak Issue is created and ERCOT provides applicable information
    1. No change from current process
25. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
26. Gaining CR user selects “Begin Working”
27. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
28. Gaining CR selects “Send to Losing CR”
    1. Comments required
29. Issue is in a state of “New (Losing CR)”
30. Losing CR selects “Begin Working”
31. Issue is in a state of “In Progress (Losing CR)”
32. Losing CR selects “Send to Gaining CR”
    1. Comments required
33. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
34. Gaining CR user selects “Begin Working”
35. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
36. Gaining CR selects “Agree”
37. The issue is in a state of ‘New (Losing CR)’ with the Losing CR as the responsible party.
38. Losing CR selects Begin Working and the issue transitions to ‘In Progress (Losing CR)’
39. Losing CR selects ‘Send to TDSP’ and provides required Proposed Regain Date and Comments.
40. The issue is in a state of “New (TDSP)” with the TDSP as Responsible MP
41. The TDSP selects “Begin Working”
42. The issue is now in a state of “In Progress (TDSP)” with the TDSP as Responsible MP
43. TDSP selects “Ready to Receive”
44. The issue is now in a state of “New (Losing CR Submit)” with the Losing CR as the Responsible MP
45. Losing CR clicks “Begin Working”
46. Issue is in a state of “In Progress (Submit Regaining)” with Losing CR as Responsible MP
47. Losing CR clicks “Provide Regaining BGN02”
48. 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
49. Losing CR selects “Inadvertent Losing” from MarkeTrak Submit Tree
50. User selects “OK” to create the issue
51. Premise Type is populated
52. MarkeTrak Issue is created and ERCOT provides applicable information
    1. No change from current process
53. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
54. Gaining CR user selects “Begin Working”
55. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
56. Gaining CR selects “Send to Losing CR”
    1. Comments required
57. Issue is in a state of “New (Losing CR)”
58. Losing CR selects “Begin Working”
59. Issue is in a state of “In Progress (Losing CR)”
60. Losing CR selects “Send to Gaining CR”
    1. Comments required
61. MarkeTrak issue is assigned to the state of “New (Gaining CR)” with the Gaining CR as the Responsible Party
62. Gaining CR user selects “Begin Working”
63. MarkeTrak issue is assigned to the state of “In Progress (Gaining CR)” with the Gaining CR as the Responsible Party
64. Gaining CR selects “Unexecutable”
65. Issue is in a state of “Unexecutable (PC)” with the Losing CR as Responsible MP
66. Losing CR selects “Accept”; issue is closed