1. **Use Case MP-3 – New Usage/Billing Sub-types**
   1. **Description: Using the current Usage/Billing workflow, create two distinct Usage and Billing subtypes 1) Usage and Billing – Missing and 2) Usage and Billing – Dispute. This will minimize the optional fields resulting in fewer issues submitted with incorrect data.**

* MarkeTrak tool will allow additional and specific information to be added to the sub-type which will enhance the TDU’s ability to resolve in a more timely and accurate manner.
* ASSUMPTION: This workflow will be created using the current Usage/Billing workflow as a foundation.
  + GUI: Usage/Billing – Dispute
  + New Field: Dispute Category
    - Min/max length: 1/30
    - Type: List
    - Permitted Values & Defs
      * Priority Issue
      * Consumption/Usage Issue
      * Billing Calculations kWh
      * Billing Calculations kW
      * Billing Calculations Power Factor
      * TDSP Charge Issues
      * Rate Issues
      * Crossed Meter Issues
      * Non-Metered Issues
    - Default Value: Blank
    - Screen Location: Issue
    - Read Only (Y,N): No
    - Updateable – Upon Submit only
    - Automatically populated (Y,N): No
    - Proprietary – visible to who: All MPs Involved
    - Field Screen Title: Dispute Category
    - Transition(s) enabled: Submit
    - Transition(s) displayed: All
    - Workflow(s) involved: Usage/Billing – Dispute
    - Field Required/Optional: Required

NOTE: Remove Dispute/Missing Field

NOTE: Tran ID field: Required

* API:
  + Updated to accommodate New Sub-type
    - Query Detail
    - Query Issue
    - Query Update
    - Remove Dispute/Missing Field
    - Add Dispute Category field
* Bulk Insert
  + Add Usage/Billing Dispute sub-type
    - Only allow defined Permitted Values
    - Allow only one Permitted Value
  + Update the Bulk Insert Appendix for D2D Issue Type with a data field for Usage/Billing Dispute.
  + Remove Dispute/Missing field
  + Add Dispute Category field
    1. **Pre-Conditions:**
* MarkeTrak is available and processing issues
* ESI ID populated must be a valid ESI ID in existence within ERCOT Registration database
* Dispute Category Field is Required
  + Only allow defined Permitted Values
  + Allow only one Permitted Value
    1. **Success Guarantee:**
* Issue is successfully created and able to be transitioned to a resolution.
  + 1. **Trigger:**
* User creates Usage/Billing – Disputes issue.
  + 1. **Main Success Scenario: Happy Path**
       - 1. REP of Record user selects Usage/Billing – Disputes from the MarkeTrak Submit Tree
         2. User enters all required information
         3. User selects “Ok” to create the issue
         4. MarkeTrak Issue is created and transitioned to Assignee (TDSP)
         5. MarkeTrak issue is assigned to the state of “New (Assginee)” with the TDSP as the Responsible Party
         6. TDSP user selects “Begin Working”
         7. MarkeTrak issues is assigned to the state of “In Progress (Assignee)” with the TDSP as the Responsible Party
         8. TDSP populates Comments in the Comments Field
         9. TDSP selects “Complete”
         10. MarkeTrak transitioned back to Submitter in “Pending Complete” State
         11. Submitter reviews response and Selects “Complete”
         12. MarkeTrak issues is assigned to the state of “Complete”
    2. **Extension Scenario: UnHappy Path- Incorrect Date**
       - 1. REP of Record user selects Usage/Billing – Disputes from the MarkeTrak Submit Tree
         2. User enters required information with incorrect date range fails to enter all required information
         3. User selects “Ok” to create the issue
         4. MarkeTrak Issue is created and transitioned to Assignee (TDSP)
         5. MarkeTrak issue is assigned to the state of “New (Assignee)” with the TDSP as the Responsible Party
         6. TDSP user selects “Begin Working”
         7. MarkeTrak issues is assigned to the state of “In Progress (Assignee)” with the TDSP as the Responsible Party
         8. TDSP selects “Unexecutable”
         9. TDSP is prompted to enter comments (noting the date range does not correlate to Tran ID field)
         10. MarkeTrak transitions back to Submitter in “Unexecutable (PC)” State
         11. Submitter selects “Accepts”
         12. Issue closes and transitions to state of ‘Complete’.
    3. **Extension Scenario: UnHappy Path Incorrect Submittal –** 
       - 1. REP of Record user selects Usage/Billing – Disputes from the MarkeTrak Submit Tree
         2. User enters all required information
         3. User selects “Ok” to create the issue
         4. MarkeTrak Issue is created and transitioned to Assignee (TDSP)
         5. MarkeTrak issue is assigned to the state of “New” with the TDSP as the Responsible Party
         6. TDSP user selects “Begin Working”
         7. MarkeTrak issues is assigned to the state of “In Progress (Assignee)” with the TDSP as the Responsible Party
         8. TDSP populates Comments in the Comments Field
         9. TDSP selects “Complete”
         10. MarkeTrak transitions back to Submitter in “Pending Complete” State
         11. Submitter reviews response and Selects “Complete”
         12. MarkeTrak issues is assigned to the state of “Complete”
    4. **Activity Diagram:**

(Visual depiction of the flow of the use case dialog – ERCOT will populate)

* 1. **Description: Using the current Usage/Billing workflow, create two distinct Usage and Billing subtypes 1) Usage and Billing – Missing and 2) Usage and Billing – Dispute. This will minimize the optional fields resulting in fewer issues submitted with incorrect data.**
* MarkeTrak tool will allow additional and specific information to be added to the sub-type which will enhance the TDU’s ability to resolve in a more timely and accurate manner.

ASSUMPTION: This new subtype will be based on the existing Usage/Billing workflow. Any changes/additions are noted in the use case.

* GUI: Usage/Billing – Missing
* No new fields required (use existing Usage/Billing required and optional fields)
  + - Updateable – Upon Submit
    - Proprietary – visible to who: All MPs Involved
    - Transition(s) enabled: Submit
    - Transition(s) displayed: All
    - Workflow(s) involved: Usage/Billing - Missing

NOTE: Remove Dispute/Missing Field

* API:
  + Updated to accommodate New Sub-type
    - Query Detail
    - Query Issue
    - Query Update
    - Remove Dispute/Missing Field
* Bulk Insert
  + Remove Dispute/Missing Field
    1. **Pre-Conditions:**
* MarkeTrak is available and processing issues
* ESI ID populated must be a valid ESI ID in existence within ERCOT Registration database
  + 1. **Success Guarantee:**
* Issue is successfully created and able to be transitioned to a resolution.
  + 1. **Trigger:**
* User creates Usage/Billing – Missing issue.
  + 1. **Main Success Scenario: Happy Path**
       - 1. REP of Record user selects Usage/Billing – Missing from the MarkeTrak Submit Tree
         2. User enters all required information
         3. User selects “Ok” to create the issue
         4. MarkeTrak Issue is created and transitioned to Assignee (TDSP)
         5. MarkeTrak issue is assigned to the state of “New” with the TDSP as the Responsible Party
         6. TDSP user selects “Begin Working”
         7. MarkeTrak issues is assigned to the state of “In Progress (Assignee)” with the TDSP as the Responsible Party
         8. TDSP populates Comments in the Comments Field
         9. TDSP selects “Complete”
         10. MarkeTrak transitions back to Submitter in “Pending Complete” State
         11. Submitter reviews response and Selects “Complete”
         12. MarkeTrak issues is assigned to the state of “Complete”
    2. **Extension Scenario: Incorrect Submittal – User Corrects**
       - 1. REP of Record user selects Usage/Billing – Missing from the MarkeTrak Submit Tree
         2. User fails to enter all required information
         3. User selects “Ok” to create the issue
         4. User immediately receives the “Warning Message”
         5. User enters all required information
         6. User selects “Ok” to create the issue
         7. MarkeTrak Issue is created and transitioned to Assignee (TDSP)
         8. MarkeTrak issue is assigned to the state of “New” with the TDSP as the Responsible Party
         9. TDSP user selects “Begin Working”
         10. MarkeTrak issues is assigned to the state of “In Progress (Assignee)” with the TDSP as the Responsible Party
         11. TDSP populates Comments in the Comments Field
         12. TDSP selects “Complete”
         13. MarkeTrak transitions back to Submitter in “Pending Complete” State
         14. Submitter reviews response and Selects “Complete”
         15. MarkeTrak issues is assigned to the state of “Complete”
    3. **Extension Scenario: Incorrect Submittal –** 
       - 1. REP of Record user selects Usage/Billing – Missing from the MarkeTrak Submit Tree
         2. User enters all required information
         3. User selects “Ok” to create the issue
         4. MarkeTrak Issue is created and transitioned to Assignee (TDSP)
         5. MarkeTrak issue is assigned to the state of “New” with the TDSP as the Responsible Party
         6. TDSP user selects “Begin Working”
         7. MarkeTrak issues is assigned to the state of “In Progress (Assignee)” with the TDSP as the Responsible Party
         8. TDSP populates Comments in the Comments Field
         9. TDSP selects “Complete”
         10. MarkeTrak transitions back to Submitter in “Pending Complete” State
         11. Submitter reviews response and Selects “Complete”
         12. MarkeTrak issues is assigned to the state of “Complete”
    4. **Activity Diagram:**

(Visual depiction of the flow of the use case dialog – ERCOT will populate)