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)
      * Will replace the current ‘Transaction Date’ field but will not be required upon the ‘Provide Regaining BGN02’ transition as is the current functionality.
        + Remove Transaction Date field from the ‘Provide Regaining BGN02’ transition. No longer applicable.
    - “Regaining Transaction Submit Date” field will be modified. No 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 transitions to 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 a state of ‘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. Losing CR populates all required information
    1. Regaining BGN 02
21. 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. 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. 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 Losing MP, TDSP, Gaining CR ROR?, Gaining CR Start Date.
6. . ERCOT will then select “**OK**” and the issue transitions to a state of ‘New (Losing CR)’.
7. Losing CR will select **Begin Working** and the issue will transition to a state of ‘In Progress (Losing CR)..
8. Losing CR selects ‘Send to TDSP’ and enters the required Proposed Regain Date and comments. The issue transitions to state of ‘New (TDSP)’.
9. The TDSP will select **Begin Working and the issue transitions to state of ‘In Progress (TDSP). The TDSP selects Ready to Receive**, enters required comments, and the issue transitions to a state of ‘New (Losing CR Submit)’.
10. Losing CR will select **Begin Working and the issue transitions to state of ‘In Progress (Submit Regaining).**
11. The Losing CR selects **Provide Regaining BGN 02** and enters the required Regaining BGN02.
12. 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.
13. Main Success Scenario (Customer Rescission): Gaining CR submits issue, Losing CR agrees to regain, Losing CR submits BDMI, reinstates ESIID one day following DOL
14. Gaining CR selects “Customer Rescission” from Submit Tree
15. Gaining CR populates comments (optional), Original Tran ID, ESIID, and selects “OK”
16. ERCOT validates ESIID, submission timeframe and valid originating transaction.
17. 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.
18. MarkeTrak issue is assigned to the state of “New (Losing CR)” with the Losing CR as the Responsible Party
19. Losing CR user selects “Begin Working”
20. MarkeTrak issue is assigned to the state of “In Progress (Losing CR)” with the Losing CR as the Responsible Party
21. Losing CR selects “Send to TDSP”
22. Issue is in a state of “New (TDSP)” with TDSP as Responsible MP
23. TDSP selects “Begin Working”
24. Issue is in a state of “In Progress (TDSP)” with TDSP as Responsible MP
25. TDSP selects “Ready to Receive”
26. Issue is in a state of “New (Losing CR Submit)” with the Losing CR as Responsible MP.
27. Losing CR selects “Begin Working”
28. Issue is in a state of “In Progress (Submit Regaining)” with the Losing CR as Responsible MP
29. Losing CR selects “Provide Regaining BGN02”
30. Losing CR populates all required information
    1. Regaining BGN 02
31. Issue is in a state of “Regaining Transaction Submitted (PC) with the Gaining (Submitting CR) as Responsible MP
32. 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.