|  |  |  |  |
| --- | --- | --- | --- |
| RMGRR Number | 129 | RMGRR Title | Revision to Customer Rescission Completion Timeline |
| Timeline | Normal | Action | Tabled |
| Date of Decision | May 28, 2015 |
| Proposed Effective Date | To be determined. |
| Priority and Rank Assigned | Not applicable. |
| Retail Market Guide (RMG) Section(s) Requiring Revision  | 7.3.5, Customer Rescission after Completion of a Switch Transaction |
| **Other Binding Documents Requiring Revision or Related Revision Requests** | None. |
| Revision Description | This Retail Market Guide Revision Request (RMGRR) provides additional guidelines regarding specific timing and responsibilities for a Competitive Retailer (CR) to complete a Customer Rescission MarkeTrak issue after completion of a Switch Request. Once a Customer Rescission MarkeTrak issue has been submitted, the losing CR has two Business Days to agree to the Customer Rescission MarkeTrak issue, and another two Business Days to send a backdated 814\_16, Move-In Request, once the Transmission and/or Distribution Service Provider (TDSP) has updated the MarkeTrak issue status to “Ready to Receive.” |
| Reason for Revision |  Addresses current operational issues. Meets Strategic goals (tied to the [ERCOT Strategic Plan](http://www.ercot.com/content/news/presentations/2013/ERCOT%20Strat%20Plan%20FINAL%20112213.pdf) or directed by the ERCOT Board). Market efficiencies or enhancements Administrative Regulatory requirements Other: (explain)*(please select all that apply)* |
| Procedural History | * On 2/2/15, RMGRR129 was posted.
* On 3/3/15, RMS considered RMGRR129.
* On 3/23/15 an Impact Analysis was posted.
* On 4/7/15 RMS considered the 3/3/15 RMS Report and Impact Analysis for RMGRR129.
* On 5/28/15, TAC considered RMGRR129.
 |
| RMS Decision  | On 3/3/15, RMS unanimously voted to recommend approval of RMGRR129 as submitted. All Market Segments were present for the vote.On 4/7/15, RMS unanimously voted to endorse and forward to TAC the 3/3/15 RMS Report and Impact Analysis for RMGRR129. All Market Segments were present for the vote. |
| Summary of RMS Discussion | On 3/3/15, there was no discussion. On 4/7/15, there was no discussion.  |
| TAC Decision  | On 5/28/15, TAC unanimously voted to table RMGRR129 for one month. All Market Segments were present for the vote. |
| Summary of TAC Discussion | On 5/28/15, participants discussed tabling RMGRR129 for one month and requested RMS recommend an effective date at the next regular TAC meeting.  |

|  |
| --- |
| **Business Case** |
| **Qualitative Benefits** | * Improves the Customer experience by adding strict timing requirements for CRs when executing Customer Rescission MarkeTrak issues.
* CRs are able to help set better Customer expectations with the Customer when honoring the Customer’s request to rescind service, and can communicate a more transparent timeline when the Customer can expect to be back with their original CR.
* Aligns operational processes with spirit of paragraph (j) of P.U.C. Subst. R. 25.474, Selection of Retail Electric Provider, by returning a Customer who wishes to rescind in a timely manner.
* Reduces the amount of cancel/re-bill activity required by the TDSP as a direct result of clarifying the exact timelines required when executing a Customer rescission.
 |
| **Quantitative Benefits** |  |
| **Impact to Market Segments** | * Positive impacts to operational and business processes within the Investor Owned Utility (IOU) and Independent Retail Electric Provider (IREP) Market Segments due to clear and transparent instruction on how to work a Customer Rescission MarkeTrak issue.
 |
| **Other** |  |

|  |
| --- |
| Sponsor |
| Name | Sheri Wiegand on behalf of MarkeTrak Task Force (MTTF) |
| E-mail Address | Sheri.Wiegand@TXU.com  |
| Company | TXU Energy |
| Phone Number | 972-507-0794 |
| Cell Number | 972-979-5225 |
| Market Segment | Not applicable. |

|  |
| --- |
| **Market Rules Staff Contact** |
| **Name** | Lindsay Butterfield |
| **E-Mail Address** | Lindsay.Butterfield@ercot.com |
| **Phone Number** | 512-248-6521 |

|  |
| --- |
| **Comments Received** |
| Comment Author | **Comment Summary** |
| None. |  |

|  |
| --- |
| Proposed Guide Language Revision |

***7.3.5 Customer Rescission after Completion of a Switch Transaction***

(1) The time period allowed for a Customer to rescind a switch transaction may extend beyond the completion date of a switch. If a Customer requests to cancel a switch for the purpose of rescission, the CR scheduled to gain the Premise shall attempt to cancel the transaction by following the steps outlined in Section 7.3.2.2, Prevention of Inadvertent Gains, regarding cancellation of the pending 814\_01, Switch Request.

(a) If the TDSP is unable to cancel the switch, or the Customer waits until after the switch is complete to exercise the rescission, but the Customer is still rescinding the agreement within the timelines specified in P.U.C. Subst. R. 25.474, Selection of Retail Electric Provider, the gaining CR shall file a MarkeTrak issue, subtype *Customer Rescission*, to initiate reinstatement of the Customer to the previous CR.

(b) Upon receiving the *Customer Rescission* MarkeTrak issue, the losing CR shall agree to the *Customer Rescission* MarkeTrak issue within two Business Days unless a valid reason for rejecting a rescission-based issue under Section 7.3.5.1, Additional Valid Reasons for Rejection of a Rescission-based Issue, is met.

(2) The TDSP shall not assess any fees related to Customer reinstatement in cases of a valid Customer rescission, provided the submit date of the MarkeTrak issue falls on or before the 25th day following the established First Available Switch Date (FASD) of the 814\_03, Enrollment Notification Request, per the timeline specified in Protocol Section 15.1.1, Submission of a Switch Request. Once this time frame has expired, the gaining CR will no longer be able to submit an issue under the subtype *Customer Rescission* and must use the *Inadvertent Gaining* subtype to return the Premise. The gaining CR will incur all TDSP charges normally associated with the return of a Premise through that subtype.

(3) Within two Business Days of the TDSP updating the *Customer Rescission* MarkeTrak issue status to *Ready to Receive*, the losing CR shall submit the backdated 814\_16, Move In Request, to reinstate the Customer for one day beyond the original date of loss. The option to reinstate the Customer for any date beyond that as outlined in Section 7.3.2.3.1, Reinstatement Date, is not applicable for rescissions received within the timelines specified in this scenario.

(4) The rules and guidelines set forth in previous sections regarding valid/invalid reject reasons, backdated transactions over 150 days, pending order notification and third party transactions/leapfrog scenarios shall apply to rescission-based reinstatement.

(5) Only those enrollments initiated by an 814\_01 transaction, and eligible for Customer rescission as defined in P.U.C. Subst. R. 25.474, may be returned through the process outlined in this Section. Only the gaining CR may initiate the process of returning the Customer to the losing CR by filing a MarkeTrak issue upon being contacted by the Customer exercising rescission. If a gaining CR attempts to submit a *Customer Rescission* issue in MarkeTrak only to discover an *Inadvertent Losing* issue has been submitted by the losing CR for the same transaction, the gaining CR shall mark the *Inadvertent Losing* issue unexecutable and proceed with submission of anew issue under the *Customer Rescission* subtype.