**Switch Hold Process**

Documentation required for CSA-

* Does TDTMS need to modify/eliminate the current document requiring signatures?
	+ TDTMS reviewed RMG section 7.16 & 7.17
	+ Specify signatures- Wet vs Electronic vs PDF edit
		- TDTMS modified documents to reflect Signatures are not needed.
* Review of the Users Guide – TDTMS to review in March\*
* Create separate section for Landlord process (RMG only) – TDTMS to do in March
* TDTMS create RMGRR to request change – will submit RMGRR at one time, including CSA changes and Landlord clarifying language.

2/4/16 TDTMS Notes:

* Separate CSA requirements from Landlord requirements within the RMG (in March)
* TDSPs do not capture the name of the CSA – only received from CR as “CSA Customer”
* TDSPs observed signatures were not being sent – after much discussion, TDTMS agreed to remove the signature requirements from J4 (CSA Agreement)

Modified 7.16.4.3.2

* Re-ordered (i) & (ii)
* Removed signature in (iii)
* Jim to add language to reflect same Customer name to be in the NOS as well as any of the documents provided in the new (ii).

Landlord Documentation and Scenarios (To be reviewed by TDTMS in March)-

Review process where landlord owes debt where switch hold is applied

* Review Users Guide clarification as a note
* Food for thought (TXSET): Possibility of adding a code to the MVI (814\_16) transaction indicating ESIID is subject to CSA – What are consequences?

2/4/16 TDTMS Notes:

* Clarification needs to be added to RMG when the Switch Hold customer is the Landlord.
* Switch Hold updates are provided by TDSPs via 814\_20s and shown on MIS and appear on the ERCOT TDSP ESIID Extract (Daily) the next day.
* The ‘Monthly’ extract will show the entire universe of ESIIDs for all TDSPs; the ‘Daily’ extract will show incremental changes.
* Most up-to-date Switch Hold file is from the ERCOT TDSP ESIID Extract.
* REPs unable to move away from the FTP site at this time – IT project will be needed.
	+ REPs to evaluate whether any project resources should be dedicated to FTP or to procuring data from the ERCOT TDSP ESIID Extract(s).
* End goal is to get to one, singular source: TDSP ESIID Extract; and do not post in multiple places like FTP.
* – process is already defined in PUCT Subst. R 25.126 (d) (6)

[TDTMS ended discussion here on 2/4/16]

[Continue here at 3/2/16 Meeting]

Can ERCOT provide metrics/data to support the MT Switch Hold( by the Market and by CR)

* Percent auto closed
* Number submitted
* Number Approved/Denied

Note: Data will be provided in 2nd qtr TDTMS meeting

Training note:Process for removal of a switch hold for meter tampering / deferred payment plan due to a move–out. TDTMS would take recommendation to RMTTF for training

Does this process offer a potential gap?

Training/Switch Hold Rule

* Review at a later time TDTMS would take recommendation to RMTTF for training
* Possible change to the current rule

Review MarkeTrak User’s Guide around Usage/Billing practices as they apply to Switch Holds