Mass Transition Testing Preparation

November 7, 2018

Scope:

1. Test no more than 3,500 ESI IDs Drop to POLR (See TDSP allotment below)
2. Test no more than 10 ESI IDs per CR by sending non-POLR switches
3. Test VREP (Volunteer) and POLR (LSP-Large Service Provider) allocation of Drop to POLR transactions

Success Criteria:

1. TDSPs to transition the Drop to POLR ESI IDs with the transition scheduled date.
2. TDSPs to complete non-POLR switches if received and accepted by the TDSP up to 19:00 CPT of the transition scheduled date.
3. Exceptions will be completed with the transition scheduled date or the scheduled date of the non-POLR transaction.

Note: ERCOT Business Process Instance (BPI) is complete when the 867\_04 or 867\_03F is received and processed.

Pre-Mass Transition Fire Drill Workshop

Agreed to

ESI IDs

 ONCOR

 Centerpoint Energy

 AEP

 TNMP

Totals will be updated once determined.

Setup Requirements

1. TDSPs will work individually with ERCOT to insure ESI ID preparation is complete prior to sending to ERCOT.
	1. **Note all TDSP ESI ID test bed preparation, in accordance with scripts, must be completed prior to sending to ERCOT**.
2. How do we get ESI IDs into RMTE?
	1. 814\_20s for all ESI IDs. ERCOT needs to verify all ESI IDs are available in the RMTE.
3. TDSPs consider setting up Default CR DUNS in test systems. As a Fall Back ERCOT will generate MVIs for TDSPs requiring their assistance.
	1. Note: test regions require manual completions for MVIs. Verify status of all ESI IDs at ERCOT.
	2. ERCOT to support the market developed method to set up the ESI IDs in a state needed for this test. Will be discussed further at the November 6, 2018 Workshop.
4. TDSPs contact ERCOT to communicate ESI ID setup dates.
5. CRs will need to be given a list of ESI IDs for competitive switches.—Date TBD
	1. How much lead time will CRs need to set up ESI IDs?—A minimum of 2 weeks after receipt of ESI ID list.
		1. All TDSP work for ESI ID test bed in accordance with scripts must be completed prior to sending to ERCOT
		2. Once TDSP has communicated ESI IDs to ERCOT, up to three weeks are needed for ERCOT to distribute the ESI IDs being used for competitive switches to POLR CRs.
		3. POLR CRs need 2 weeks to prepare for the competitive switches
6. How many competitive switches will be included into population of no more than 3,500
ESI IDs?
	1. ERCOT hope to have this number developed at the November 6, 2018 Workshop.
	2. The meeting attendees would like to suggest that 5% or less, of the total 10,000 ESI IDs, competitive transactions are sent.
	3. CRs that will be sending competitive transactions need x days to set up the ESI IDs in their system.
		1. If the CRs get the list of ESI IDs when the TDSPs send the list to ERCOT, the days lead time needed may be less.
7. Test competitive MVI or Switch for scheduled date prior to or on scheduled “TS” date.
	1. Meeting attendees recommend a maximum of 10 ESI IDs assigned per CR for competitive transactions.

Mass Transition Events

\* Please note the list of Mass Transition Events corresponds with the timeline listed in the draft RMGRR on pages 10 & 11 as shown below. <http://www.ercot.com/content/wcm/key_documents_lists/139245/13._DRAFT_XXXRMGRR-01_Related_to_NPRRXXX_Revisions_to_Mass_Transition_Processes_10XX18.doc>

1. Email Notice to market by ERCOT – Day 0
2. Market Call – Day 0 or Day 1\*
3. ERCOT triggers “TS” transactions for 10,000 ESI IDs Day 0 or Day 1\* – DTW 2 calendar days from current.
4. Market Call – Day 1—Status Competitive orders MVI / Switch ROBO call, email, test messages, commission letters, CBCI information to REPs.
5. Market Call Day 2—Effective date of “TS” transactions status, competitive orders MIV / Switches w accepted until 19:00 CPT – TDSPs may send 867\_04s with completion of “TS”.
6. Market Call Day 3-Status. TDSPs to send 867\_04 / 03s.Depending upon when effective date “TS” completes. May not generate until Day 5 market call.
7. Market Call Day 4—Status. TDSPs provide 867\_04s or 867\_03s if outstanding.

In order to minimize risks to the testing the following recommendations are suggested

* Avoid:
	+ ERCOT release dates
	+ Spring Break dates—last 2 weeks in March
	+ May 1 and 2 due to Retail training in Dallas.
	+ April 19, 2019 due to conflict with Easter weekend including Good Friday
* Mass Transition Test should be initiated after Flight 0219 is concluded