**Mass Transition Module**

**DRAFT Outline Updated 03\_07\_19**

1. Course Objectives
   1. Understanding A Mass Transition
   2. Know Why A Mass Transition Occurs
   3. Describe How a Mass Transition is Executed and Completed
   4. Communicate Roles and Requirements of MPs involved in a Mass Transition
2. Understanding A Mass Transition
   1. Refer to PUCT 25.43
      1. 2 - Calendar Day Timeline as prescribed in rule
      2. Defaulting CR
      3. Credit risks
      4. Unavailable Meter Reads
      5. POLR CR Product Guidelines
   2. Protocol Definitions
   3. Retail Market Guide 7.11
      1. Definitions in 7.11.1
      2. Slide 3 in Jim’s MT Deck
         1. Transition Date
      3. 5 - Day Timeline for Transactional Completion
      4. CBCI File Format, Data Content and Timing
3. What are the goals of the process?
   1. See Slide 2 of Jim’s MT Deck
4. What are their responsibilities?
   1. ERCOT
      1. Notifications
         1. All Market
         2. Impacted Market Participants
         3. Customers
         4. PUCT
      2. ESI allocation
      3. Transaction Processing
      4. Facilitates Daily Project Coordination Calls
      5. Determine the Completion of the Mass Transition Event
   2. PUCT
      1. Oversight
      2. Participates in Daily Project Coordination Calls
      3. Manage the Decertification Process
   3. TDSPs
      1. Preparation of systems
      2. Transaction processing
         1. Drop to POLR
         2. Non-POLR Transactions
      3. Meter reads
      4. Participates in Daily Project Coordination Calls
   4. Defaulting CR
      1. CBCI file
      2. Transaction Processing
      3. Participates in Daily Project Coordination Calls
   5. POLR CRs (VREPs/LSPs)
      1. Transaction processing
      2. Customer communication
      3. Participates in Daily Project Coordination Calls
   6. Non-POLR CRs
      1. Send Non-POLR Transactions (Switch or Move-In)
   7. Customers
      1. Choice
5. How does the transition occur? What is the timeline?
   1. Slide 4 of Jim’s MT Deck
6. TX SET 101 Mass Transition Flow Diagram
   1. Prioritizing Customer Choice
      1. Before transition date
      2. On transition date after 19:00 (7:00 PM)—moved to the next AMS Operational Day or Business Day depending on service requested (MVI vs. SWI)
      3. After transition date