Mass Transition Testing Preparation

Scope:

1. Test no more than 3,500 ESI IDs Drop to POLR (See TDSP allotment below)
2. Test no more than 3 ESI IDs per selected CR by sending non-POLR switches
3. Test VREP (Volunteer) and POLR (LSP-Large Service Provider) allocation of Drop to POLR transactions
4. Recommendation is to hold a workshop in March 2020

Allocation:

No more than 3500 ESI IDs still to be determined by ERCOT





Setup Requirements

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

Avoid:

* ERCOT release dates
* Spring Break dates
* May 6 and 7 due to Retail training in Dallas.
* April 10, 2020 due to conflict with Easter weekend including Good Friday
* It is recommended that Mass Transition Test should be initiated after Flight 0220 is concluded prior to Flight 0620
1. TDSPs to identify and send list of ESI IDs to be used to ERCOT.
2. ERCOT will verify all ESI IDs are available in the RMTE.
3. For ESI IDs that are unavailable in the RMTE, TDSPs will send 814\_20s.
4. TDSPs may set up the Default CR DUNS in test systems, or coordinate with ERCOT to receive MVIs for any ESI IDs requiring their assistance.
5. CRs will need 2 weeks to prepare for the competitive switches.
	1. ERCOT to identify the Non-POLR ESI IDs and send those to the Non-POLR CRs.
	2. Non-POLR CRs to send Non-POLR Switches to ERCOT at one time.
	3. ERCOT to hold Non-POLR Switches as received; then release at various times of the day to TDSPs

ERCOT Communication of Mass Transition Activities to Market Participants

1. Unless otherwise noted, ERCOT will follow the established market processes for communications during a Mass Transition as outlined in Retail Market Guide Section 7.11

Success Criteria:

1. TDSPs to transition the Drop to POLR ESI IDs with the Mass Transition Date.
2. Exceptions will be completed with the Mass Transition Date or the scheduled date of the non-POLR transaction.
3. TDSPs to send ERCOT 867\_04 or 867\_03F no later than day 5 of the Mass Transition event.

# Mass Transition Timeline

# RMG Section 9 Appendix F2 Timeline for Initiation of a Mass Transition

**Calendar**

**Day -1**

**Notification Date**

Default confirmed by ERCOT legal

Initial Notification sent

Initial Project Coordination Call scheduled

If default is on a Business Day before a weekend or ERCOT holiday, initial project coordination call to occur on same Business Day

**Project Coordination Call**

**Mass Transition process:**

* ESI ID allocations & lists are generated and sent to POLR and/or Designated CR and affected TDSPs by ERCOT
* 814\_03s sent by ERCOT requesting Mass Transition Date.
* ERCOT requests Customer Billing Contact Information from Defaulting CR.

**Project Coordination Call**

* 867\_02s from TDSP to ERCOT.
* 814\_04s from TDSP to ERCOT.
* 814\_11s from ERCOT to Losing CR.
* 814\_14s from ERCOT to POLR and/or Designated CRs.
* Customer billing information sent by ERCOT to POLR and/or Designated CRs and affected TDSP(s).
* ERCOT sends PUCT mandated notifications to Customers

**Project Coordination Call**

* TDSP sends to ERCOT Final 867\_03s and ERCOT forwards to Losing CR.
* TDSP sends 867\_04s to ERCOT and ERCOT forwards to POLR and/or Designated CRs.
* Mass Transition completes at ERCOT.

 **Calendar**

**Day 0**

**Mass Transition Date**

**Project Coordination Call**

* TDSP performs meter reads (actuals or estimates) for Mass Transition Date.

 **Calendar**

**Day 1**

 **Calendar**

**Day 2**

 **Calendar**

**Day 3 & 4**

 **Calendar**

**Day 5**

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