**TDTMS**

**July 22nd, 2021**

**WebEx only**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Attendee | Company | Attendee | Company | Attendee | Company |
| Jim Lee | AEP | Dave Michelson | ERCOT | Mick Hanna | ERCOT |
| Sam Pak | Oncor | Steven Pliler | TXU | Jordan Troublefield | ERCOT |
| Kathy Scott | CenterPoint | Eric | GridMonitor | Melinda Earnest | AEP |
| Sheri Wiegand | TXU | Carolyn Reed | CNP | Corde Nuru | CNP |
| Kyle Patrick | NRG | Tammy Stewart | ERCOT | Trish Matus | ERCOT |
| Eric Blakey | Just Energy | Stephen Wilson | Vistra | John Schatz | Vistra |

**Minutes, Antitrust**

* Antitrust Admonition was read by Sheri
* Minutes from 6/17/21 were reviewed and approved

**ERCOT System Instances & MarkeTrak Monthly Performance Review**

* All Retail Market IT SLAs for June were met
* MarkeTrak performance remains positive on SLOs and “back to normal” levels with slight improvement
* Quick review of IT Services Reporting (found on SLA page) which is a summary of all market notices impacting system performance

**ERCOT Communications - Listserves**

* Mick Hanna reported testing is in progress, password staging, and coordinating with vendor on a few deliverables
* Mick further explained the listserves is a 50 gig file with transfer to ERCOT systems to occur after hours and “penciled in” to transfer starting around 7/29 and over the weekend
* No update on the BACK-UP Plan during outages – Mick will continue to work with Ted Hailu.

**ERCOT MIS API Workshop**

Mick reported the development team is reviewing the parameters provided by Kyle to see the level of effort for the API view to match the GUI view.

**ERCOT MarkeTrak Upgrade & SCR815 MarkeTrak Admininstrative Enhancements**

* ERCOT continues to work on the Impact Analysis for the technical refresh upgrade for MarkeTrak
* The IA for SCR815 came back with a 6 – 9 month implementation timeline @ $75 – 95K
* Dave explained the two projects will be worked in conjunction with each other and in the end, both will align.
* ERCOT has a commitment to deliver the tech refresh with an upgrade of the UI first, and the SCR is considered phase II. With this plan, ERCOT may need to redline the SCR.
* When asked if the tech refresh would impact APIs, Dave responded no significant impacts, however, WSDLs will change in the SCR
* Dave plans to bring “show and tells” to TDTMS and RMTTF to use for training development
* Any workshops planned for the tech refresh? Not at this time. It is thought they will not be necessary, however, will certainly pivot if market participants feel a workshop is needed
* SCR815 status:
  + IA will be presented at 7/28 TAC – then rank and priority
  + Presented to Board 8/10

**RMGRR 166 – Switch Hold Repository**

Dave sought clarity that the ‘certified’ note in the RMGRR can be corrected to ‘secured’ as the Switch Hold lists do not need to be posted by DUNS as the SH list is the “ master list” of all ESIs with current SHs in place. The modification will be made via desktop edits as opposed to formal comments from ERCOT or TDTMS.

The IA for RMGRR166 will be presented at the August RMS where rank and priority will be discussed . This would then go to TAC in Aug and if a project is required, Board in October.

**DRAFT RMGRR Switch Hold Removal Documentation**

* IAs for both RMGRR 166 and 167 will be reviewed as follows:
  + Aug RMS – IA
  + Aug TAC
  + Effective date of September
* Plan is for the new form to be rolled out immediately effective 9/1/21 with a transition period of 30 days and effective 10/1/21, only the new form will be accepted with submittal of SH Removal MarkeTrak. The ACTION item below still applies to remind market participants of change.
* ACTION ITEM: a reminder of updated NOS forms will be sent via market notice on 8/16 to ensure market participants are utilizing the latest form with the above effective dates noted.

**MT Enhancements – Validations**

The below timeline was discussed in planning the submission of the DRAFT SCR for the MarkeTrak Validation Enhancements. The goal is to complete review of all proposed suggestions during the July meeting. At the August meeting, Sheri will present a DRAFT SCR for final review prior to submission to September RMS as noted below.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | September | Posting Deadline | October | | November | | | December |
|  | RMS (9/14) |  | RMS (10/5) | PRS (10/14) | RMS (11/2) | PRS (11/10) | TAC (11/17) | Board (12/14) |
| SCR  -*TDTMS* | Vote to Approve Filing | 9/29 (Wednesday) |  | Vote to Approve    Language |  | Vote to   Approve IA | Vote to Endorse   Revision Request | Vote to Approve    Revision Request |

The attached spreadsheet was modified as the WG quickly reviewed the June revisions (General and IAG) and completed review of Missing Enrollment Transactions, Switch Holds, Usage & Billing, and Additional Subtypes.



At a high level, the following are the proposed validation enhancements:

1. Requiring mandatory comments for any ‘negative’ (unexecutable) transition
2. Pop Up on IAG/IAL if regain date is > 150 days (regain date vs current date)
3. Adjustment of Rescission window from 25 days to 15 days from date of OTRAN
4. Creation of new Meter Cycle Change Request subtype
5. Creation of new “867 vs Sum of LSE Intervals – Dispute subtype
6. Further clarification on AMS LSE – Dispute subtype – i.e. disputing peak interval, estimation methodology, allocation of estimated consumption, etc
7. Usage & Billing – Dispute – addition of radio button if cancel/rebills are expected
8. Missing Enrollment Transaction – two additional validations: 1. Confirm if 867\_04 has been sent 2. If 5 days have passed from 814\_04/05 and/or if any changes have occurred
9. Ability of TDSPs to transition Switch Hold Removal MT when Holding CR’s time limit has been exceeded
10. Upon submission of Switch Hold Removal MT, the following validations to occur: 1. “No Switch Hold Pending on ESI ID” 2. Issue Should Not be Submitted by ROR”
11. ERCOT to pre-populate the current ROR for a Switch Hold Removal, then forward to the TDSP for validation

**AGENDA for 8/19/21 Meeting**

1. ERCOT Update
   1. System Instances and MarkeTrak Monthly Performance Review
   2. Market Data Transparency SLOs
   3. ERCOT ListServ Performance
      1. Memorializing Back-Up Plan
   4. ERCOT MIS API Workshop
   5. MarkeTrak Upgrade
2. Follow up on status:
   1. RMGRR Switch Hold Removal Documentation Clarification
   2. RMGRR Create Switch Hold Repository
   3. SCR MarkeTrak Administrative Enhancements
3. Semi-annual review of overall MT subtype volumes – January 2021 through July 2021
4. Finalize SCR – MarkeTrak Validation Enhancements – TXSET 5.0