**TDTMS**

**2021 Goals**

1. Support Texas data transport improvement initiatives and continue joint efforts with other retail market working groups
   1. Collaborative with the Retail Market Training Task Force on operational issues in educating the market
   2. Supporting a TXSET 5.0 IAG solution by providing needed data analysis results
2. Develop a System Change Request (SCR) for proposed MarkeTrak operational/administrative enhancements to streamline efficiency and align with current market guides
3. Aligning with TXSET 5.0 improvements, draft a project proposal for operational/validations for MarkeTrak enhancements
4. Perform biannual review of overall MarkeTrak subtype volumes for trends and the need for further analysis of various subtypes based on data points established
   1. Perform an in-depth analysis of Switch Holds and Usage & Billing subtypes
5. Continued support in reviewing the market Switch Hold notification process
6. Utilization of IAG data analysis framework to establish metrics for Rescissions and Unexecuted IAGS and present results based on July 19 to July 20 data
7. Utilization of IAG data analysis framework to review IAG results at least once per year (request updated data through the end of 2020 in March and present results by June)
8. Use MT data analysis results to review expected Service Level Agreements posted in the MarkeTrak User’s Guide and revise to improve performance and streamline the process
9. Perform annual review of the Retail Market Services and Market Data Transparency Service Level Agreements (SLAs) and work with ERCOT to evaluate and implement any potential changes, as needed
10. Review the quarterly ERCOT Retail Market Performance Measures
11. Support ERCOT resolution efforts in addressing each outage and/or degradation of service

**2020 Accomplishments**

1. Supported Texas data transport improvement initiatives and continuous joint efforts with other retail market working groups
   1. Collaborative effort with TXSET to review and develop an IAG solution for consideration of TXSET 5.0 enhancements
      1. Established goals of the IAG solution proposal
      2. Identified and fully vetted 4 initial options – pros and cons of each
      3. Developed/updated proposed options matrix landing on the ‘push vs pull’ TXSET 5.0 solution matrix for IAG streamlining
2. Established a matrix of data/reporting requirements for ERCOT to assist TDTMS in framing an on-going MarkeTrak sub-type analysis
3. Reviewed biannual overall MarkeTrak subtype volumes, discussed trends, and applied results to support MarkeTrak enhancements
4. Developed a list of proposed Marketrak enhancements
   1. Sorted the list of enhancements by administrative vs validation revisions
      1. administrative suggestions to be managed via a separate SCR and not required to follow the timeline for TXSET 5.0
      2. validation suggestions requiring more coding/logic and thus will follow the TXSET 5.0 project timeline
   2. Prioritized each recommendation by ‘level of effort’ and ‘priority – high/med/low’
5. IAG/IAL Subtype Deep Dive Analysis – developed IAG MarkeTrak Performance Metrics framework and effectively evaluated over 44,000 completed IAG and IAL MarkeTraks to identify timelines for each step in the IAG/IAL Marketrak process:

|  |  |  |  |
| --- | --- | --- | --- |
| Inadvertent Situation Flow | | | |
| Time elapsed | | | |
| 2 → 1 | original transaction to submittal of MT | |  |
| 2 → 3 | how long touch |  |  |
| 2 → 4 | agreement between CRs | |  |
| 3 → 4 | how long to agree once touched | |  |
| 4 → 6 | Losing CR to send BDMVI | |  |
| 5 → 6 | Ready to Receive to submittal of BDMVI | |  |
| 2 → 8 | total resolution time |  |  |

* 1. Performance metrics presented to RMS as a tool for each CR to evaluate their own IAG/IAL performance and identify improvement opportunities
  2. Developed Tips & Tricks/User’s Guide for IAS Market Reports and sent instructional email to RMS, TDTMS, and RMTTF listserves

1. Support of ERCOT’s NAESB TLS 1.2 upgrade – preparation, establish workarounds to ensure market operations during cutover, communication, post implementation discussion
2. Reviewed current switch hold notification market process (by TDU) and provided suggestion for new secure repository in ERCOT MIS – developed initial list of requirements
3. Reviewed Switch Hold Removal process as outlined in the Retail Market Guide to ensure language provides clarity on declining such removal of the switch hold
4. Full review of postings to MarkeTrak Information page on ercot.com with recommended actions to improve relevant information
5. Reviewed and monitored monthly IT retail incident and service availability – new graph displaying historical MarkeTrak performance
6. Approved the Retail Market Services Service Level Agreements for 2021 for endorsement to RMS
7. Officially adopted ownership of the Market Data Transparency Service Level Agreements review for endorsement to RMS
8. Supported relaunch of the Issue Tracking Page – an overall report of all outages posted to ercot.com