**TDTMS**

**December 8th, 2021**

**WebEx only**

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| --- | --- | --- | --- | --- | --- |
| Attendee | Company | Attendee | Company | Attendee | Company |
| Jim Lee | AEP | Dave Michelson | ERCOT | Mick Hanna | ERCOT |
| Sam Pak | Oncor | Steven Pliler | Vistra | Jordan Troublefield | ERCOT |
| Kathy Scott | CNP | Eric Lotter | GridMonitor | Trish Matus | ERCOT |
| Sheri Wiegand | TXU | Carolyn Reed | CNP | Diana Rehfeldt | TNMP |
| Kyle Patrick | NRG | Stephen Wilson | Vistra |  |  |
|  |  |  |  |  |  |

**Minutes, Antitrust**

* Antitrust Admonition was read by Sheri
* Minutes from 10/20/21 were reviewed and approved

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

* All Retail Market IT SLAs for November were met
  + Listserv had its first successful failover
  + Listserv stats for November:
    - 670 posts
    - 320K emails
    - Mick will provide a trending visual on listserv stats next month
* MarkeTrak performance metrics are good and remain stable
* Retail SLOs (including new listserv SLO) were approved at RMS with minor edits on language references. NOTE: Extended outage moved up to 6/4 – 6/5 weekend from the planned 10/8 – 10/9 due to meeting deadlines for MarkeTrak tech refresh (UI is not supported on current version which prompted the tech refresh)
* Mick reminded WG a retail release is planned for this Sunday, December 12th

**ERCOT MarkeTrak Upgrade & SCR815 MarkeTrak Administrative Enhancements**

* Project has been moved up to the extended retail release weekend 6/4 – 6/5 for reasons noted above
* New MarkeTrak will look and feel like FlighTrak
* Dave M anticipates “show and tell” of the new MarkeTrak in Q1 2022.
* New version will be available in RMTE and Dave encourages all market participants to access RMTE to view new version. NOTE: different digital certificates are required for RMTE and suggested market participants request access now (sooner than later, as these certs are approved by Dave and Paul Yockey’s team and do not go through Client Services like the others)
* One of the heaviest lifts for the project is updating the MarkeTrak User’s Guide
* The UG will be the basis for training workshops and updates of on-line modules. The thought was RMTTF would collaborate with ERCOT on updating modules while ERCOT focuses on the UG.
* SCR815 enhancements will not occur until December
* Training was discussed for both the June release and the December release. ERCOT will continue to collaborate with RMTTF on training
* API changes will occur with the December enhancement release as the June release do not change functionality just look of MarkeTrak

**RMGRR167 Switch Hold Removal Documentation Clarification**

Reminder RMGRR was approved and market participants should have transitioned to the revised New Occupant Statement by 11/1. No one indicated they were experiencing any issues with the revisions.

**SCR 817 MarkeTrak Validation Revisions Aligning w/ TXSET v5.0**

RMS endorsed the IA whose costs were ~$500K. Next stop is PRS on 12/14. Retail market representatives will be present to address any questions.

**RMGRR166 Revised Timing for Switch Hold Extract Availability**

RMS approved RMGRR at the 12/7 meeting. The IA will be presented to RMS in January, then onto TAC in January and likely February PUCT approval with an effective date of then 3/1/22.

**Unexecutable Reasons for commonly used subtypes**

REPs and TDSPs met off- line after the October meeting to firm up the common unexecutable reasons. Sheri reviewed where the team had landed and what was presented to ERCOT developers. The approach was if a common reason was not selected from the drop- down list, then comments would be required in order to transition the MT back to the submitter.

Sheri also reviewed REP’s intentions to possibly propose an RMGRR to clarify the valid unexecutable reasons for IAGs. Kathy reminded the WG that with v5.0 new reject codes were proposed that will address some of these issues mentioned, in particular leap-frog scenario. Sheri indicated when the REPs review the suggestions again, they will revisit RMGRR 169 (changes with TXSET v5.0) to ensure the issues/clarifications are addressed.

**2021 Accomplishments/2022 Goals**

WG reviewed the following proposed 2021 Accomplishments and 2022 Goals. Participants are asked to review again and make any edits, additional suggestions, or revisions at the next meeting when these will be finalized for presentation at February’s RMS meeting.

**2021 Accomplishments**

1. Supported Texas data transport improvement initiatives and continuous joint efforts with other retail market working groups
   1. TXSET
      1. supported development of an IAG solution for consideration of TXSET 5.0 enhancements, SCR 817
      2. supported inclusion of ERCOT MIS API functionality in TXSET 5.0 NPRR & RMGRR
   2. RECTF
      1. Assisted in establishing SLAs and guidance for “breakglass” procedures for ERCOT Listserv Communication platform
   3. RMTTF
      1. Provided continued support of market education opportunities as discovered in the MarkeTrak subtype analyses
2. Reviewed biannual overall MarkeTrak subtype volumes, discussed trends, and applied results to support MarkeTrak enhancements for SCRs 815 & 817
3. Submitted two SCRs for proposed Marketrak enhancements
   * 1. SCR 815 - administrative suggestions to be managed via MarkeTrak Technical Refresh
        1. Expanded common Unexecutable Reasons for various subtypes
     2. SCR 817 - validation suggestions requiring more coding/logic and aligned with TXSET 5.0 NPRR and RMGRR
4. Unexecutable IAG/IAL Subtype Deep Dive Analysis – utilized the IAG MarkeTrak Performance Metrics framework evaluating 1553 Unexecuted IAG and IAL MarkeTraks to identify timelines for the first four steps 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. Supported of ERCOT’s extended release window in May – preparation, establish workarounds to ensure market operations during cutover, communication, post implementation discussion
2. Reviewed current switch hold notification market process (by TDU) and pivoted from a suggestion for new secure repository in ERCOT MIS to an RMGRR modifying the timelines for Switch Hold extract information to made available to market participants – RMGRR 166
3. Improved the Switch Hold Removal process in creating RMGRR 167 to ensure language in the RMG provides additional clarity in documents required for the removal of a switch hold
4. “Cleaned up” the Market Metric page and PUCT links on ercot.com as instructed by RMS
5. Reviewed and monitored monthly IT retail incident and service availability
6. Approved the Retail Market Services Service Level Agreements for 2022 for endorsement to RMS including new Listserv SLAs

**2022 GOALS**

1. Support Texas data transport improvement initiatives and continue joint efforts with other retail market working groups

a) Collaborate with the Retail Market Training Task Force on any operational issues in educating the market and support for the MarkeTrak Upgrade

b) Continued support of TXSET 5.0 IAG solution for any development requirements

c) Quarterly review of monthly ERCOT IAG report

2. Support/Monitor ERCOT’s efforts in the MarkeTrak Technical Refresh and SCR 815 MarkeTrak Enhancements

3. Perform biannual review of overall MarkeTrak subtype volumes for trends and the need for further analysis of various subtypes based on data points established

4. Perform IAG data analysis using framework established in 2020 to identify metrics/trends for market participants performance using ERCOT provided data

5. Use MT data analysis results to review expected Service Level Agreements to improve performance and seek opportunities to streamline processes

6. Perform monthly review of the Retail Market Services and Market Data Transparency Service Level Agreements (SLAs), including Listserv performance, and work with ERCOT to evaluate and implement any potential changes, as needed

7. Review the quarterly ERCOT Retail Market Performance Measures if needed

8. Support ERCOT resolution efforts in addressing each outage and/or degradation of service

**Next Meeting:**

**DRAFT Agenda**

1. Elections
2. ERCOT Update
   1. MarkeTrak Upgrade progress
3. Finalize Goals and Accomplishments
4. Biannual review of MT subtype volumes
5. Plan for 2022 MT analysis

Next meeting is scheduled for **Thursday, January 20th @ 9:30 AM via WebEx**.

Jordan announced the Met Center will not be open in January and the hope is for a February opening, but that remains to be determined.