Mass Transition Testing Preparation

Scope:

1. Test no more than 3,500 ESI IDs Drop to POLR (See TDSP allotment below)
2. Test VREP (Volunteer) and POLR (LSP-Large Service Provider) allocation of Drop to POLR transactions

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
* April 15, 2022 due to conflict with Easter weekend including Good Friday
* It is recommended that Mass Transition Test should be initiated after Flight 0222 is concluded prior to Flight 0622
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.

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. 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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| Document Revision History |
| Date | Description | Author(s) |
| 1/22/2020 | Approved for 2020 | TXSET (Patrick) |
| 1/19/2022 | Draft | TXSET (Patrick) |
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