**TDTMS**

**January 18, 2023**

**WebEx only**

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| Attendee | Company | Attendee | Company | Attendee | Company |
| Diana Rehfeldt | TNMP | Carolyn Reed | CNP | Kyle Patrick | NRG |
| Sam Pak | Oncor | Tammy Stewart | ERCOT | Monica Jones | CNP |
| Dailey Smith | LP&L | Melinda Earnest | AEP | Eric Lotter | GridMonitor |
| Sheri Wiegand | Vistra | Brittney Albracht | ERCOT | Kathy Scott | CNP |
| Steven Pliler | Vistra | Mick Hanna | ERCOT | Paula Shadle | NEC |
|  |  |  |  |  |  |

Brittney opened the meeting with the Antitrust Admonition and held the elections for leadership.

Chair – Sheri Wiegand, Vistra

Co-Chair – Monica Jones, CNP

Minutes from the December 7th meeting were approved as posted.

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

* Mick presented **December performance reports** – all monthly and annual SLA targets have been met
  + - Maintenance on 12/10 – MT SCR815 implementation
    - Failover scheduled for Sunday 1/23
  + It was brought up that earlier in January a market participant experienced degradation on MIS the first week in January. Mick Hanna will follow up.
* MarkeTrak response times remain positive with flattening curve
* **Listserv activity** – no incidents
  + - Weather Moratorium listserv – no auto sign-offs or auto-deletes – ERCOT will continue to monitor and display if sign offs/deletes occur
  + **SLAs for 2023 –** approved at RMS with modifications to dates
* **SCR 815 Stabilization** – no issues

**SCR 817 MarkeTrak Validations –**

Tammy brought up two clarifications that were made to the business requirements due to a maximum character limit of 64 characters (for unexecutable reasons):

1. Section 2.2 – Unable to Cancel - ‘*Per ERCOT Protocols, the CR must send an 814\_08 Cancel Request unless there is a system outage and the CR is unable to send/receive TXSET EDI transactions’* trims down to ‘*Per ERCOT Protocols, a CR must send an 814\_08 if systems permit*’
2. Section 2.5 – Meter Cycle Change Request - ‘*Per ERCOT Protocols, a CR must send an 814\_08 if systems permit*’ trims down to ‘*Only one meter cycle change per ESIID per ROR for this Customer’*
3. CNP comment for Section 2.8 added for clarity – “*NOTE: Response shall be provided following TDSP’s completed investigation of CRs Usage and Billing Dispute. Post investigation response.”*

This topic will remain an open agenda item to address any clarifications while in development.

**MarkeTrak Subtype Volume Analysis – Follow Up Discussion**

Reviewed guidelines in the 1.8.2.1 Automated Email Notifications in MT User’s Guide . These timelines represent when escalation emails are sent to the escalation contacts.

**Day to Day Issues**:

**Cancellation:**

* Escalation after 7 days without transition
* TDSP Escalation: Siebel Status/Sub-status of the service order should be Cancelled within 24 hours

**Inadvertent Switch:**

* Responsible MP Escalation: after 7 calendar days without transition
* ERCOT Escalation: 48 hours to update/transition the issue from the “New (ERCOT)” or “In Progress (ERCOT)” states
* Losing MP Escalation: The Regaining Transaction Status should be “Scheduled” or “Complete” within 72 hours of the “Regaining Transaction Submitted”

Sheri had suggested possibly revising these timelines. The consensus of the group was to retain the above escalation times and use the data from our biannual analysis to monitor for trends.

**ACTION**: Sheri will reach out to Client Services to inquire about REP ID#s being passed to REPs and also creating awareness of the reports available to review REP performance in an effort to driving improvement opportunities.

Sam also suggested creating a “dashboard” for performance and is willing to continue his data analysis for TDTMS for which we are grateful.

**PUCT Project 52796**

Reviewed market performance based on last data analysis. It was decided this will be reviewed once PUCT project is approved. Regulatory groups are reluctant to tighten the IGL timelines.

**Accomplishments 2022 & Goals 2023**

Sheri presented the draft G&A and a few modifications were made. The following will be presented at February RMS:

**2022 Accomplishments**

1. Supported successful MarkeTrak Upgrade:
   1. facilitating training sessions to introduce MarkeTrak users to the operations of the new platform.
   2. Sent reminders to market participants of changes and encouraged review in RMTE.
   3. Monitored stabilization for completion of outstanding issues
2. Successful approval of SCR817 – MarkeTrak Enhancements Aligning w/ TXSET 5.0.
   1. Continued working with ERCOT during the development of the business requirements addressing any clarifications needed.
   2. Suggested new Market Rule subtype to accommodate the proposed revision in TXSET v5.0 to cancel a pending CSA Add - *CSACAN*
3. Implementation of RMGRR166 – Revised Timing for Switch Hold Extract Availability
4. Performed the Bi-annual reviews of the MarkeTrak Subtype Analysis volumes noting observations:
   1. Taking follow up action on a few subtypes – 997s, Safety Net, and MVO w/Meter Removal for additional insight on potential opportunities.
   2. Prompted further discussion of ranks by volume over the years and a subsequent analysis of time spent on specific subtypes
5. Reviewed monthly ERCOT IAG report noting observations and presenting findings to RMS.
6. Follow up activities around ERCOT 3/4/22 system issue causing a delay in transaction processing thus resulting in higher rejections for Invalid Backdating.
   1. Additional monitoring in place
   2. Spurred review of ERCOT Help Desk processes seeking efficiencies and assistance from RMTTF in training/informing market participants of appropriate use of Help Desk tickets
7. Prepared for seamless market operations (transaction processing) during ERCOT’s extended release.
8. Drove review of listserv activity as a result of communication issues with some market participants – communicated thresholds set for listserv platform to ensure communication will be forwarded and also recipients will not dropped
9. Supported successful December implementation of SCR815 MarkeTrak Enhancements:
   1. Provided clarity of request during development stage
   2. Facilitated training sessions for MarkeTrak users
10. Approval of RMGRR170 Inadvertent Gain Process Updates providing clarity to the appropriate use of IAG process and codifying the No Current Occupant process

**2023 Goals**

1. Support Texas data transport improvement initiatives and continue joint efforts with other retail market working groups
   1. Collaborate with the Retail Market Training Task Force for any operational education opportunities
   2. Continued support of TXSET 5.0 IAG solution for any development requirements
   3. Quarterly review of monthly ERCOT IAG report
2. Support/Monitor ERCOT’s development efforts for SCR 817 MarkeTrak Enhancements associated with TXSET v5.0
3. Perform biannual review of overall MarkeTrak subtype volumes for trends and the need for further performance analysis of various subtypes
4. Perform IAG & MT data analysis using established framework to identify metrics/trends for market participants and market performance using ERCOT provided data
5. 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
6. Review the quarterly ERCOT Retail Market Performance Measures, as needed
7. Support ERCOT resolution efforts in addressing each outage and/or degradation of service

**NEXT MEETING scheduled – February 15th @ 1:00 PM WebEx only**

* ERCOT Updates
  + System Instances & MT Performance
  + Listserv
  + MarkeTrak SCR815 follow up
* SCR817 Business Requirements discussion, *if needed*
* MarkeTrak Volume Subtype Analysis – latter half of 2022 overall volumes
* Review of Data Points for MT Deep Dive Analysis