**TDTMS**

**February 15th, 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 |
| Jordan Troublefield | ERCOT | Mick Hanna | ERCOT | Eric Lotter | GridMonitor |
| Sheri Wiegand | Vistra | Steven Pliler  | Vistra | Kathy Scott | CNP |
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Sheri opened the meeting with the Antitrust Admonition.

Minutes from the January 18th meeting were approved as posted.

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

* Mick presented **January performance reports** – all SLA targets have been met
	+ - Site failover on 1/22
		- 2/5 retail release
* MarkeTrak response times have leveled out
* **Listserv activity** – no incidents
	+ - Weather Moratorium listserv – no auto sign-offs or auto-deletes
* Question was brought up regarding the renewal of a certificate on 2/3 – generally speaking, a reminder notice should be provided, however, the need to update the SSL certificate was not provided. Many market participant systems will manage a cutover of certs. Mick will request that reminder notices are provided.

**SCR 817 MarkeTrak Validations –**

Tammy brought up a couple of clarifications to the business requirements to ensure accurate interpretation:

1. Section 2.2 – when the drop down for unexecutable reasons is not applicable, comments *will* be required to transition the Cancel w/ Approval subtype
2. Section 2.8 – for Usage & Billing – Disputes, the radio button (YES/NO) for billing corrections will be prompted upon transition of ‘complete’ and ‘unexecutable’ where comments will be optional. The radio button *will not* prompt for the ‘return to submitter’ transition.

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

**Biannual MarkeTrak Subtype Volume Analysis –** July through December 2022

Review of the below data revealed the following observations:

* *Inadvertent Losing* subtype has remained the front-runner since 2017
* *Inadvertent Gain* subtype has seen a decline latter half of 2022
* *Switch Hold Removals* appear to be seasonal with higher volumes the last half of the year – could also be attributed to Covid and Uri moratoriums in place
* *Usage & Billing – Missing & Disputes* spikes when TDU has major effort – system conversion/3G remediation
* *Other* bucket continues to drop since BUSIDDRQ to AMS profile efforts conclude
* *Projects* subtype remains elevated; expected decline when new *Meter Cycle Change Request* subtype is added with SCR817



**Data points for MT deep dive analysis**

The matrix of requested data points was briefly reviewed noting AMS/LSE Dispute data is no longer required as the subtype volumes have seen a significant decrease over the last few years.

It was decided a smaller group (Sam, Monica, Kyle, and Sheri) would meet to review the data points desired. Sam recalled the last ‘data dump’ was missing a few desired fields. Sam has graciously offered to develop a dashboard, if you will, with possible heat maps to offer guidance on REP performance for various MarkeTrak subtypes. The goal is to package the data for REPs review to determine how their performance aligns with fellow market participants.

**Template for Client Services**

As a follow-up to a question posed at RMS regarding REP outreach informing CRs of the reports and data available for review, TDTMS will develop a template with links to analysis results CS may use during meeting with various REPs. Ted Hailu with ERCOT indicated these resources, along with the REP’s assigned number may be provided.

Initial suggestions for template:

* REP assigned #
* Monthly IAG report available at RMS
* Links for 2 Inadvertent situation analyses – July 19-July 20 data, July – December 2021 data
* Additional subtype analysis performed at the end of 2022

**Proposed meeting schedule for 2023**

With MCT and TXSET using the entire days previously scheduled for TXSET and TDTMS, TDTMS will proposed moving their meetings adjacent to TXSET with the following dates:

March meeting – CANCELLED – allowing time for the smaller group to meet on MT data points

April 20th, Thursday @9:30 AM

May 16th, Tuesday @ 9:30 AM

June 22nd, Thursday @ 9:30 AM

July 18th, Tuesday @ 9:30 AM

August 17th, Thursday @ 9:30 AM

September 21st, Thursday @ 9:30 AM

October 18th, Wednesday @ 9:30 AM

November 16th, Thursday @ 9:30 AM

December 13th, Wednesday @ 9:30 AM

Sheri will send a note to Stakeholder Services to revise the meeting dates and copy Kyle and Kathryn for alignment.

**NEXT MEETING scheduled – April 20th @ 9:30 AM WebEx only**

* ERCOT Updates
	+ System Instances & MT Performance
	+ Listserv
* SCR817 Business Requirements discussion, *if needed*
	+ Inadvertent workflow and use of IA/CR for both back-dated and forward-dated MVIs
* Review of ERCOT IAG monthly reporting provided at RMS
* MarkeTrak Volume Subtype Analysis – proposed dashboard