**TDTMS**

**April 20th, 2023**

**WebEx only**

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| --- | --- | --- | --- | --- | --- |
| Attendee | Company | Attendee | Company | Attendee | Company |
| Diana Rehfeldt | TNMP | Dave Michelson | ERCOT | Kyle Patrick | NRG |
| Sam Pak | Oncor | Tammy Stewart | ERCOT | Monica Jones | CNP |
| Jordan Troublefield | ERCOT | Mick Hanna | ERCOT | Eric Lotter | GridMonitor |
| Sheri Wiegand | Vistra | Dailey Smith | Lubbock | Kathy Scott | CNP |
|  |  | Cindy Duong | Just Energy | Tomas Fernandez | NRG |
|  |  | Livia | Just Energy |  |  |

Sheri opened the meeting with the Antitrust Admonition.

Minutes from the February 15th meeting were approved with one addition (ERCOT MT performance graph).

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

* Mick presented **March performance reports** and discussed the April outages experienced – all SLA targets have been met
  + - 4/3 NAESB outage 10:30 – 10:43 am – external patching cycle exercise – as noted earlier, with heightened cybersecurity activity, patching will occur on a regular basis which can increase compliance, cybersecurity, and operational risks – in this case, an ‘active’ site was mistakenly identified as ‘passive’ thus impacting the exercise resulting the short NAESB transactional outage – additional verifications have been added as a preventative measure
    - 4/13 NAESB outage 3:56 – 4:22 pm – outage impacted entire ERCOT network – for this outage, the patching exercise was not effective - ERCOT duly noted market notices could have been more timely and has put measures in place to notify the market sooner – CNP shared their issues with the API post NAESB recovery and thanked Mick Hanna for his support throughout their restoration process
* MarkeTrak response times are normal
* **Listserv activity** – 3/29 email delays ; 4/3 also impacted by NAESB outage
  + - Weather Moratorium listserv – longer list of auto-deletes however majority appear to be from REP who has exited the market
* **MIS API project update –** planned for the early December release, testing will be available for the 4-5 API users the week prior to test applications – noted architecture will be the same as EWS (ERCOT Web Services) that is used in other applications – ERCOT will entertain meetings with API users to review any detailed questions from market participants IT teams
* **AMS Settlement extract –** at the request of NRG, the timing of the AMS Settlement extract was reviewed which only yielded further questions for ERCOT. It was expressed AMS interval data for Lubbock will only be received via the extract post go live until ~ Q2 2024 and if the extract was available sooner, it would be more beneficial. Some of the questions posed were:
  + If the AMS Settlement extract is available OD+3, is the data that of which ERCOT uses to perform initial settlement (which occurs at OD+5) ? There was agreement the data is desired as soon as can be available, however, wanted to be mindful of the quality of the data.
  + Or does the 727 extract house the settlement interval data used for initial settlement?

ACTION: WG attempted to seek answers from Kelly Brink, however, due to audio issues, the questions (Kyle and Sheri to draft) will be sent to both Kelly and Dave Michelson for the ERCOT response. It was also decided to further review timing of all extracts as drafted in the guides.

**SCR 817 MarkeTrak Validations –**

Tammy reviewed the couple of clarifications to the business requirements:

1. Section 2.8 – for Usage & Billing – Disputes, the radio button (YES/NO) for billing corrections cannot be prompted without a default setting when transitioned to ‘complete’ or ‘unexecutable’. The decision was to replace with a required drop down of ‘yes’ or ‘no’ thus accomplishing the original goal.
2. Section 2.6 – 867 and LSE data mismatch – new subtype will be displayed as it’s own “header” and not folded under the Usage and Billing hierarchy.
3. New Meter Cycle Change requests will have the ROR validation in order to submit the request.
4. Monica brought up the question on the use of IA and CR codes in transactions received from REPs. The understanding is that these codes should be used whether a forward dated or back dated transaction is submitted to resolve the IAG MarkeTrak. Kathy suggested this topic be discussed at MCT where there is a broad audience to get more input from market participants. ACTION: Tammy will discuss with Kathryn Thurman.
   1. Will transactions be rejected for BD if IA code is not present
   2. Support from user’s guide stating proposed regain date should match date on follow up transactions and codes should used when associated with a MT.
   3. Will dates on transactions be “skootched” to next business day or rejected by TDSP if IA and CR codes are present?

This topic will remain an open agenda item to address any clarifications while in development. Tammy also reported that development is progressing well.

**IAG Discussion**

**Review of ERCOT IAG stats report – January 2023**

* Sheri briefly reviewed the stats noting the **overall volumes of completed MTs is the lowest** it has been in a while, also pointing out the elevated rescission activity was limited to two REPs, and the “offenders” of higher volume IAGs has moved from the REPs > 1% to REPs < 1% which was a recent shift.
* Tomas commented that the levels have remained consistent; they are just seeing **more IAGs unexecuted**. Unexecutable comments are being returned from the Losing REP with notes such as “fraudulent enrollment – proceed with MVO”. The intent of the recent RMGRR was to prevent the Gaining REP from using the IAG process to return an ESI to the previous REP and not for a Losing REP to indicate they experienced fraud or was unpaid thus unexecuting.
* ACTION: Sheri and Tomas will **review the revised applicable RMG sections** with possible suggested edits to clarify that identity theft is pointed to the Gaining REP and not the Losing REP. In these cases, the Losing REP should still regain and then issue the Current Occupant process that is outlined in the revisions.
* **Energizing switches** were also discussed as a scenario of IGL use. For example, a DNPd ESI that switches away and is energized by the TDSP, then later is submitted as an IGL (with the same customer name). This activity is not in the spirit of the intentions of an IAG. The question was raised as to why a SWI energizes an ESI. Table 9 of the RMG was reviewed and questions were raised as to the origin of the energizing SWI. ACTION: This topic will be taken up further at TXSET working group meeting.

**Data points for MT deep dive analysis**

Sam, Monica, Kyle, and Sheri did meet to review the data points requested and added TDSP to a few of the subtype requests. Sheri requested the large “data dump” of Dave earlier in the week. ACTION: Once Dave provides the full 2022 data, Sam has offered to sort the data into the previous format for review by the WG hopefully at the next meeting.

**Template for Client Services**

It was decided that the template will be created when the next data analysis is complete to present “fresh” data, yet still reference the essentials and historical analyses as noted below:

* 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

**NEXT MEETING scheduled – May 16th, Tuesday @ 9:30 AM WebEx only**

* ERCOT Updates
  + System Instances & MT Performance
  + Listserv
* SCR817 Business Requirements discussion, *if needed*
* Inadvertent Gain revision request clarity, update
* MarkeTrak Subtype Analysis – IAGs, etc.