**LRITF Meeting**

Thursday, May 25, 2023

1:30 PM

Webex only

Attending

* AZ
* Abraham
* Abigail M
* Adrienne Downey\_NEER
* Amy Sue Stirland LP&L
* Angela Ghormley – Calpine Energy
* Ashley
* Behnaz-Just Energy
* Bill Snyder – AEP
* Call-in User\_5
* Call-in User\_6
* Candy Galicia
* Chris Rowley
* Chris Sims – Lubbock Power & Light
* Cindy Duong – Just Energy
* Connie Hermes/South Texas Electric Cooperative
* Corey
* Dailey Smith – LPL
* Dale Gibbs – Just Energy
* Deavonte Anderson
* Deb Belin Earth Etch
* Debbie McKeever - Oncor
* Dee Lowerre Reliant
* Elizabeth
* ERCOT-Dave Michelsen
* ERCOT-Catherine Meiners
* ERCOT-Jordan Troublefield
* ERCOT- Kennedy Meier
* ERCOT – Ted Hailu
* Eric Broach – NextEra Energy Retail
* Eric Lotter – GridMonitor
* ESG – Mark Pepdjonovic
* Frank Nunes - VertexOne
* Gary Vickers
* Greg
* Hansen, Matthew
* Heather Fails
* Jackson, Tavares\_Gexa
* Jason Lee
* Jennifer Li
* Jessica Hernandez-Chariot
* Jim Wade
* John Schatz/TXU Energy
* Joshua Kane
* Kathy Scott
* Klint Shaddox Guest
* Krista Ortiz – LP&L
* Kyle Patrick/NRG
* Laura Gomez-LP&L
* Lauren Damen Reliant
* Lori Lee Barfield- Just Energy
* Lubbock Power & Light
* Luke Lee – Octopus
* Mary McIvor
* Michael Heselton
* Michael Winegeart – LP&L
* Nabaraj Pokharel/OPUC
* Nathan Harwell
* Nelson Rincon – Octopus Energy
* Olivia Ryan Kraken Tech
* Pam Shaw
* Paul Williams ePsolutions, Inc
* Paul Yockey - ERCOT
* PUCT – Floyd Walker
* Rice L
* Ross Delahoussaye – Octopus Energy
* Sam Luna – BKV Energy
* Sam Pak - Oncor
* Scarlet M-LPL
* Shaleen Gupta – Tomorrow Energy
* Sheri Wiegand – Vistra
* Susana Fraire, LP&L
* Suzanne Bertin
* Tyler Krueger BDE
* Veloria Watts
* Viviana Valdez LP&L
* William Butler LP&L
* Yohan Sutjandra - Octopus Energy
* Zeenat Virani

**Quick Updates**

**FERC Status**

Michael Winegeart with LP&L provided the update that the FERC ruling is still in progress and it is not known when there could be a decision. It was announced a second settlement conference is scheduled for July 6th.

FERC Docket No. ER23-1144-000

PUCT Docket 54553

**Retail Testing Flight Status**

Update from Lubbock, full end to end flight testing is complete. There are ~40 REPs needing to complete penny and/or connectivity, but going well.

Sheri asked if she could get a status on the number incomplete at the next LRITF meeting.

**Legislative Update**

Lubbock provided an update that both bills passed in both the House and Senate and was signed by the Governor last Friday so those took effect immediately. Outcome is that there will not be dual billing and they will be able to share data with ERCOT. These are two huge accomplishments.

**Chapter 5 and Customer Protection**

Still working on Chapter 5 and Customer Protection. They are going to try to get those to Board & Council next week and also try to get that out prior to the next RMS/LRITF meeting (6/6/23)

Question: Will a draft be available for discussion at the LRITF meeting?

Response: Probably will be further along with Chapter 5 than Customer protection so for Chapter 5, that’s likely.

**RMGRR**

Comment was made that the RMGRR was not added to the Agenda but it was posted and was received from Lubbock. Dave Michelson posted and wanted to make sure everyone saw that. John noted that the current RMGRR is different from the RMGRR that is posted.

ERCOT volunteered to review and identify the differences and a draft will be available prior to the next LRITF meeting. Sheri confirmed any references to dual billing may be removed (comments submitted earlier).

**Solution to Transition Stacking Work Session**

The following points were expressed.

* Move-ins must be sent. Switches should not be sent until the originating MVI has completed.
* Only Move-ins will “energize” service in ERCOT. All transitioning customers will have power.
* Blackout period term has been replaced with DREP Assignment period.
* The Default REPs are: TXU Energy, Reliant Energy, Octopus Energy.

**Solution to Stacking provided by LP&L**

*See presentation for details*.

There are 4 phases that define the Transaction logic which are listed below in chronological order.

Documentation will be modified to note the Move in date/transition will be on Meter Read Cycle.

1. Customer Choice
2. DREP Assignment
3. Transition
4. Post Transition

Sheri facilitated discussion for the presentation from Lubbock including questions and responses.

Scenarios for each step of each phase were reviewed.

ERCOT responded to questions posed to them.

Specific points made during the meeting.

* During the Customer Choice period, switches will not be accepted. Same for the DREP Assignment.
* Switches should be sent after the start of Transition and Post Transition.
* ESI ID does not have to be energized to send in a CSA thus may be submitted as soon as transactions are accepted.
* No switches until the ESI ID is energized in ERCOT.
* Lubbock indicated there are pieces/nuggets of information included in the swim lanes that will be helpful.
* True MVIs may occur once the transition commences. For example, for new construction or to energize a premise, a customer should contact a their REP of choice to submit an MVI.
* True MVOs during the transition will be handled by LP&L. If a pending MVI exists and the customer is moving out prior to transitioning, LP&L will cancel the pending MVI and move the customer out of the premise.
* Any move-ins during the transition period will be managed by the customer’s REP of choice, Lubbock will handle the move outs during the transition.
* If your transaction is dated for MMRD and you were not ‘first in’, they will be rejected.
  + Kyle asked a question. Should we try to build a consistent process so they don’t have to shift gears when the DREP process occurs. Might be tricky for some call centers. The DREP is the safety net. Should DREP use MMRD and the Competitive REPs use MMRD+1? Pam responded and said that they have thought about this. Through reviewing processes and reviewing the DUNS #s, once Lubbock has the DUNS #s set up in their system, Lubbock will know who is a DREP and who’s not.
  + Chris explained that this has already been built by Lubbock and they probably don’t want to go back and rework that. Lubbock mentioned the reporting and business processes that would need to be adjusted. Much work has been done to get ready for the October go-live which has been delayed.
  + Consensus was reached today that changes will not be made and Lubbock will proceed with the current build/process that has been outlined by the swimlanes.
  + If the CSA is active, they will need still need an initiating a move-in at the Transition.
  + If a Move-in is sent not on the MR date, Lubbock will push that to the Meter Read date but only on that first Move-in
  + If it’s de-energized and an initial MVI has been submitted, MMRD+1 on the MVI will trump the original MVI until they have transitioned

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* Post Transition: normal stacking logic will resume. This is after all the cycles have transitioned to Retail. A competitive Retailer can switch. Switches will not be accepted until the ESI has transitioned.

**Draft Lubbock Move to Retail Stacking Logic Swim lanes**

Lubbock led us through the document including the points from Lubbock. Below are the exact statements made in the document under; CR Proposal Pros. These include:

* Customer Choice: Customer is not burdened with a switching moratorium.
* Customer can actively choose a CR as all other customer in ERCOT currently do.
* Empowers Customer to choose a CR if the DR requires a deposit.
* Default REP has no usage to write off if a customer switches to a CR.
* Default REP has plenty of time to submit MVIs. LP&L provides DR all required data.
* Timing of transactions uses stacking logic to minimize LP&L manual work.

A few additional questions were posed:

1. If a tampering situation is outstanding, how will charges be handled?
   1. The ESI ID will transition energized and charges will be managed by LP&L
   2. If the tampering occurred post transition, charges will be managed by the REP

Updates for next meeting 6/6 @ 1:00 PM :

* ERCOT or Lubbock to provide a count of the number of REPs incomplete for Flight Testing
* Lubbock to provide a draft of Chapter 5
* Lubbock to provide a status update on Customer Protection
* ERCOT to provide differences between the RMGRR that was posted and what was distributed.
* Stacking Solutions update (responses on outstanding questions during today’s meeting.