**Lubbock Retail Integration Task Force (LRITF)**

**Solution to Transition Stacking \_ final final notes­\_060623**

Defining transaction logic based on the following four phases

**Customer Choice**

* All ESIs must have an initiating transaction as a MVI to “energize” the premise within the ERCOT market
* Initial MVIs should have a requested date of the ESIs MMRD (meter read cycle), if not, LP&L will adjust to MMRD – *adjustment performed only on initial MVI*
* Competing transactions for MMRD will be scheduled as ‘first in’
* CSA Adds may be submitted anytime when Selling period opens – *confirmed with ERCOT – 814\_18 Adds may be submitted once ‘selling period’ opens*
* For customers who initially enrolled with REP A, yet would like to “switch” to REP B
	1. Should SWI (814\_01) be submitted with MMRD+1? No, the Switch would not energize the deenergized ESI ID. ERCOT Operating Rule #4 will reject the SWI
	2. Can MVIs (814\_16) be submitted with MMRD+1 prior to DREP assignment? Yes
	3. Should customer contact REP A requesting to cancel service, then contact REP B to enroll for MMRD? Yes, that would be best option as opposed to submitting an MMRD+1 MVI
	4. Should one day bills be expected where applicable? Possible Post Transition occurrence once normal stacking occurs, however, should not occur with transition of MMRD+1.
* How will actual MVIs/MVOs be handled? Documented in Swimlane for True MVI and True MVO. Once the initial transition begins, true MVIs will be initiated by REP despite MMRD. True MVOs during customer choice window will be handled by Lubbock.
* What will be the timeline for customer choice transactions to conclude? TBD

**DREP Assignment**

* Will only MVIs for predetermined ESIs (customers who did not select REP during selling window) from DREPs will be accepted? NO, MVIs will still be accepted from CRs, however, any MVI that is not from a DREP will need to be MMRD+1 for the stacking logic to work
* Will LP&L reject all MVIs from all other REPs during this timeframe? NO, MVIs from Non DREPs will need to be sent with MMRD+1 for the stacking logic to work. ERCOT trumping and stacking logic will apply.
* Will cancel transactions be accepted during the DREP Assignment? Yes
* Will any consideration be given to ESIs who have a CSA associated in the assignment of a DREP? CSAs will not be considered as Lubbock will not be aware of CSA flags
* Should actual MVIs/MVOs be held until post-DREP Assignment? No, see True MVI and True MVO swimlanes. Once the initial transition begins, true MVIs will be initiated by REP despite MMRD. MVOs during DREP Assignment will be handled by Lubbock. Pending MVIs (whether competitive MVI or DREP MVI), will be cancelled if the customer MVOs prior to MMRD.
* If an MMRD+1 transaction is received, it will trump a DREP MVI and the DREP will receive a cancel for their MVI

**Transition**

* MVIs for predetermined ESIs (customers who defaulted) will be accepted for MMRD+1 and will trump DREP’s MVI up to the day prior or the day of the MMRD? Correct No one day bills should be expected, correct? Correct
* Will cancels be accepted for DREP MVI transactions prior scheduled MMRD? Yes, we will monitor ESI IDs without a MVI and reassign to DREPs as needed
* Will cancels be accepted for competitive MVI transactions prior to scheduled MMRD? Yes
* For customers who initially enrolled with REP A, yet would like to “switch” to REP B
	1. Should SWI (814\_01) be submitted with MMRD+1?

NO, for an ESI ID that has not transitioned, a SWI will not energize the deenergized premise and will be rejected per ERCOT Operating Rule #4. An MVI with MMRD+1 should be submitted.

YES, for an ESI ID that has transitioned, normal market processes will flow.

* 1. Will MVIs with MMRD+1 submitted by CRs as a second competitive transaction be rejected ensuring the first competitive MVI will effectuate? No, MMRD+1 will effectuate trumping the first competitive MVI or the DREP transaction
* Will CSAs only be activated upon an MVO post transition? Yes, first MVO processed by ERCOT will generate an 814\_22 to the CSA holder. Reminder landlords will need to submit MVI for vacant premises as CSAs will not activate or ‘energize’ the premise.
* How will any actual MVIs/MVOs be handled? See True MVI and True MVO swimlanes. Once the initial transition begins, true MVIs will be initiated by REP despite MMRD. MVOs during DREP Assignment will be handled by Lubbock. Pending MVIs (whether competitive MVI or DREP MVI), will be cancelled if the customer MVOs prior to MMRD. OPEN QUESTIONS: what is a true MVI? any 814\_16 with a new legal entity including new construction. How will force out situations be handled prior to transition? Who cancels the MMRD transaction? LP&L? Force out situations during the transition period will be managed by LP&L – LP&L will cancel the pending MVI scheduled for the MMRD if an MVI occurs prior to the scheduled MMRD MVI.

**Post-Transition**

* Normal solution to stacking logic will apply for all transactions Yes, normal market processes will flow, SWIs/MVIs/MVOs will be accepted

**Questions/Scenarios Posed**

1. What will be the stacking logic during the customer choice period? See swimlanes

CR transactions – 1CR/ No DR

CR transactions – 2CRs/ No DR

1. What will be the stacking logic during the DREP assignment period?

DR transactions w/ subsequent CR – will the market accept transactions during the DREP assignment period? YES

1. Will transactions be rejected if initial MVI is not requested for the MR cycle date?Lubbock will push transaction to MR cycle date
2. Will normal stacking logic apply after the initial MVI is completed? Yes
3. How will true MVIs be handled during the transition? Once the initial transition begins, true MVIs will be initiated by REP despite MMRD.
4. Development of matrix on timing of transactions for each meter cycle. TBD
5. When will LP&L close open enrollment period, specifically what time? 7PM or Midnight? TBD, LPL discussing internally
6. (CONFIRM) If you are a new Lubbock resident needing a MVI date before 10/2, you must first become a Lubbock customer and go thru the transitional pre-enrollment or DREP process. You will leave Lubbock for a new REP’s plan which will become effective on your LPL MR date in October.  Correct
7. (CONFIRM) If you are going to be a new Lubbock resident needing service after 10/1, you may choose your MVI date, not to be sooner than 10/2.  Correct
8. For all ESIs currently in LPL footprint will CRs/DREPs need to provide the MR date in 814\_16s or will LPL be returning the effectuating MR date in all our response trxs?  What I am asking is do the CRs/DREPs need to be precise with the read dates or since LPL is taking the reads on those MR dates we should just expect them to be executing the reads on the appropriate MR date.  I only ask this because it might be easier for LPL to perform the reads since CRs will have automate their websites and call centers to try to hit the date for LPL.  Customers are not going to know their date to request. Lubbock is planning to effectuate MVI’s on the Customers cycle date. The system will respond with the cycle date in the acceptance response. The exception will be MMRD+1 situations, the initial response will be the cycle date +1 but when the MVI is processed, the date will be the cycle date.