**TDTMS**

**September 21st, 2023**

**WebEx only**

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| --- | --- | --- | --- | --- | --- |
| Attendee | Company | Attendee | Company | Attendee | Company |
| Jesse Macias | AEP | Dave Michelson | ERCOT | Kyle Patrick | NRG |
| Tammy Stewart | ERCOT | Dee Lowerre | NRG | Monica Jones | CNP |
| Jordan Troublefield | ERCOT | Sam Pak | Oncor | Eric Lotter | GridMonitor |
| Sheri Wiegand | Vistra | Bill Snyder | AEP | Kathy Scott | CNP |
| Mick Hanna | ERCOT | Catherine Meiners | ERCOT | Marina Grady | Oncor |
| Bjorn Krosby | ERCOT | Dale Gibbs | Just Energy | Russell Kelley | Vistra |

Sheri opened the meeting with the Antitrust Admonition and announced attendees.

Minutes from the August 17th meeting were reviewed and approved.

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

* Mick presented **August performance reports** and noted all SLA targets for August were met along with MarkeTrak response times continuing to perform well, all under the 12 month average.
* 8/13 an unplanned site failover occurred where in flight email was delayed in sending from 8/13 to 8/17. Failover procedures have been modified to minimize in flight email being sent late. Should a hard fail occur, then subscribers might see delayed email at which point a market notice would be sent outlining expectations.
* **Listserv activity** –
  + - Over 630,000 recipients and ~3500 posts for August
    - Lot of removals from Weather Moratorium listserve
* **MIS API project update –** Technology Working Group met 8/24 and reviewed the technical changes for the Retail MIS API with the lead architects. The Retail MIS API will be moving from MIME to SOAP exchanges and as of 12/10 the MIME functionality will no longer be supported. MarkeTrak API will not be changing as it is already using SOAP exchanges. GO LIVE is still planned for a 12/10 release with a testing window scheduled for 11/6 – 11/10. Special digital certificates will be required for test environment since RMTE does not have the infrastructure for MIS and these may be obtained by emailing ercot for the certificates. A market notice was posted today, 9/21 with WSDL information. Kathy forwarded to TDMTS listserv during the meeting. Any coordination of the API should be made through Dave Michelson and his retail operations team.
* **2024 retail release calendar–** market participants should expect more frequent yes less in duration release periods for 2024. ERCOT is finalizing the dates and will post to the listserv when made available. TXSET 5.0 will be handled outside of retail release calendar.
* **TDTMS EDM Implementation Guide update –** was approved by RMS on 9/12 which concluded the approval process. The revised EDM Guide will be posted on ercot.com.

**SCR 817 MarkeTrak Validations –**

Tammy reported testing is going well and no further clarifications are needed.

**MarkeTrak Scenarios –**

**Switch Hold Removal –** Kyle Patrick opened up the discussion on recent observations and lack of consistency across the market regarding the required documentation to remove a switch hold. Typically, for a lease agreement, the first and last page of the lease (with the signatures and other pertinent information) is sufficient. A couple retailers have been requiring the full lease agreement (sometimes over 40 pages) prior to releasing the hold. A few notes from the TDSPs on expectations:

* Oncor – originally requiring the full lease however recently changed their expectation to only the pages with the pertinent information and then will pass to the REP. If the receiving REP requires the full lease, Oncor will honor their request prior to releasing the hold.
* AEP – reviews documents then forwards to the ROR allowing them to make a determination
* CNP – will accept first and last pages of lease and if ROR requires full lease, they too will honor ROR’s request

Sheri and Kyle will work offline to possibly develop some language for the RMGRR that will clarify the requirement then share with the WG.

**MVI vs SWI scenario –** Sheri indicated she received an inquiry from a REP asking about the consequences of a REP sending the incorrect transaction particularly in the non-residential space and the available process to correct the situation. An example is when a REP sends a SWI 814\_01 as opposed to an MVI 814\_16 for a premise with a new legal entity. The former tenant receives an early termination fee for ‘breaking their contract’ and the new tenant avoids the permitting requirement. An IAL was attempted to regain the ESI by the former REP allowing the new REP to submit the appropriate transaction. The process as described should technically work, however, in the example, the current REP indicated they had a valid enrollment.

A few comments were noted:

* No validation of customers performed by the TDSP on a SWI to ensure they are the same
* TSDPs will capture the name on the SWI transaction even when different to align systems
* Training highlights the differences/consequences between sending the “wrong” transaction – slide will be modified to notate the following:
  + TDSP outage alert programs will be reset with MVIs, not SWIs
  + For SWIs, postcards will be sent by ERCOT
  + Discuss financial impacts of incorrect transaction
* Some REPs mention or “sell” no ETFs, then submit MVI transactions in the market to avoid ETFs from previous REP

**MarkeTrak Volume Subtype Analysis**

Sam walked through the large spreadsheet of MT data (divided into first half of 2022 and latter half of 2022) to review the SH removal and Usage & Billing MT performance data as a sample. It was noted the summary will be presented at RMS noting highlights only with suggested tips on how to review the data. This information along with the IAG/IAL data and talking points will be sent to Client Services to communicate with the REP population. The goals of reviewing the data were again discussed:

* Baseline IAG performance and trends before (and after) 5.0/MT to validate the changes
* Individual REP performance/volumes on MT subtypes submitted – leveraging data for Client Services for awareness on REP’s process opportunities
* Timing analysis may reveal updated acceptable SLAs – waiting on results of data



A screenshot of a spreadsheet

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**NEXT MEETING scheduled – October 18th Wednesday @ 9:30 AM WebEx only**

* ERCOT Updates
  + System Instances & MT Performance
  + Listserv
  + MIS API review
  + Upcoming retail releases – 2024 retail release calendar
* SCR817 Business Requirements discussion, if needed
* Follow up – Switch Hold Removal required documentation
* Inadvertent Gain Data Analysis – additional data points
  + % of invalid enrollments by Gaining and Losing CRs
  + Unexecutables - % & timing
  + Rescissions