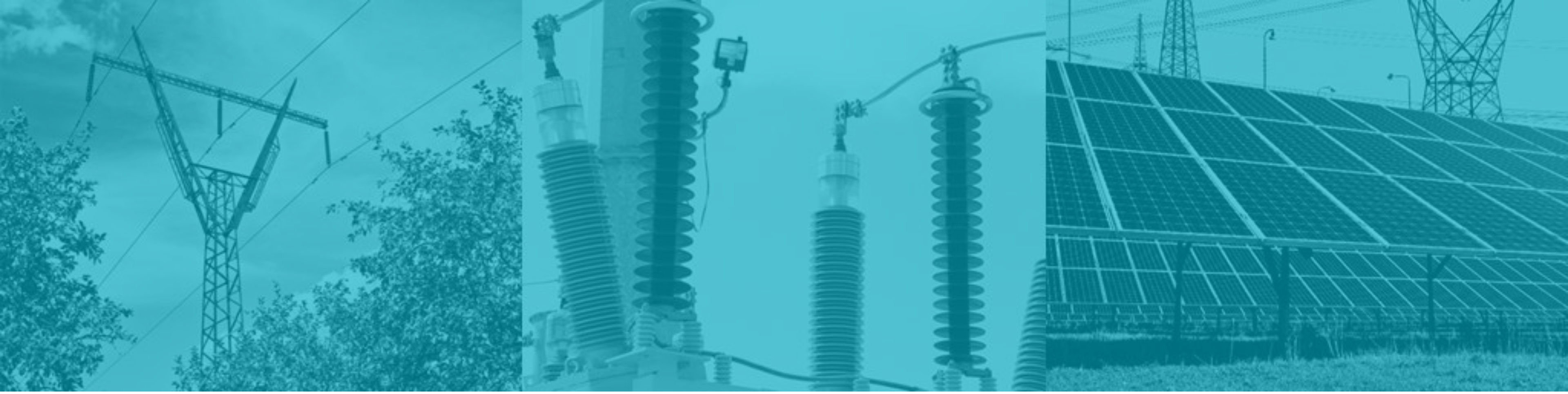


ERCOT Retail 101

2024_05 Retail 101

Welcome!

Greetings
and
Introductions

Housekeeping

- WebEx Training Tips
    - Windows
    - Buttons
- Attendance
- Questions / Chat

Please enable video & audio capabilities

PROTOCOL DISCLAIMER

This presentation provides a general overview of the Texas Nodal Market and is not intended to be a substitute for the ERCOT Protocols, as amended from time to time. If any conflict exists between this presentation and the ERCOT Protocols, the ERCOT Protocols shall control in all respects.

For more information, please visit:

http://www.ercot.com/mktrules/nprotocols/

Course Topics

Topics in this course include:

1 Retail Market Responsibilities

2 Market Rules

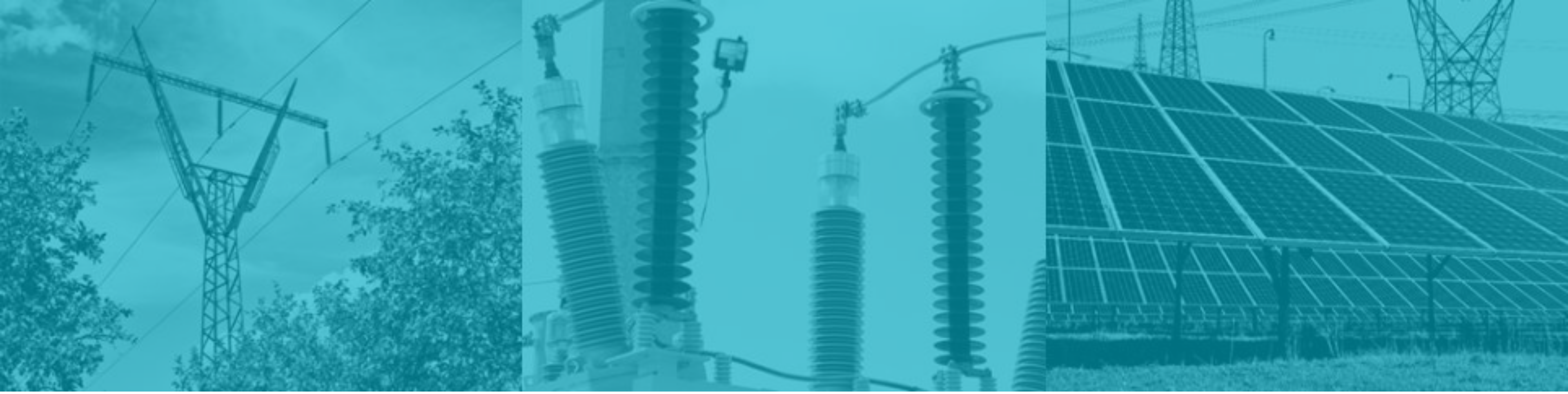
3 Retail Operations

4 Metering

5 Wholesale Settlement of Retail Load

6 Data Transparency and Availability

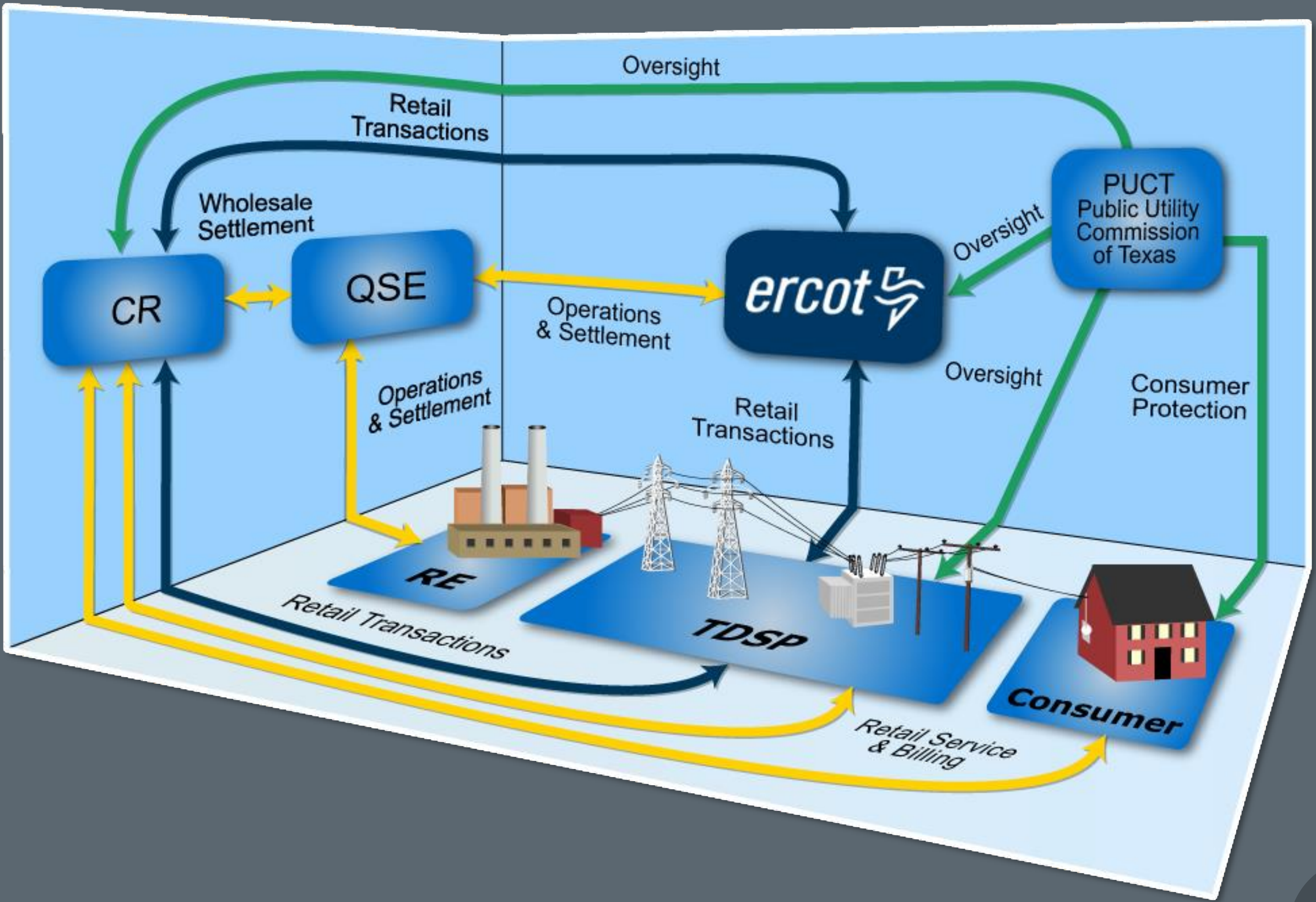
7 Issue Resolution



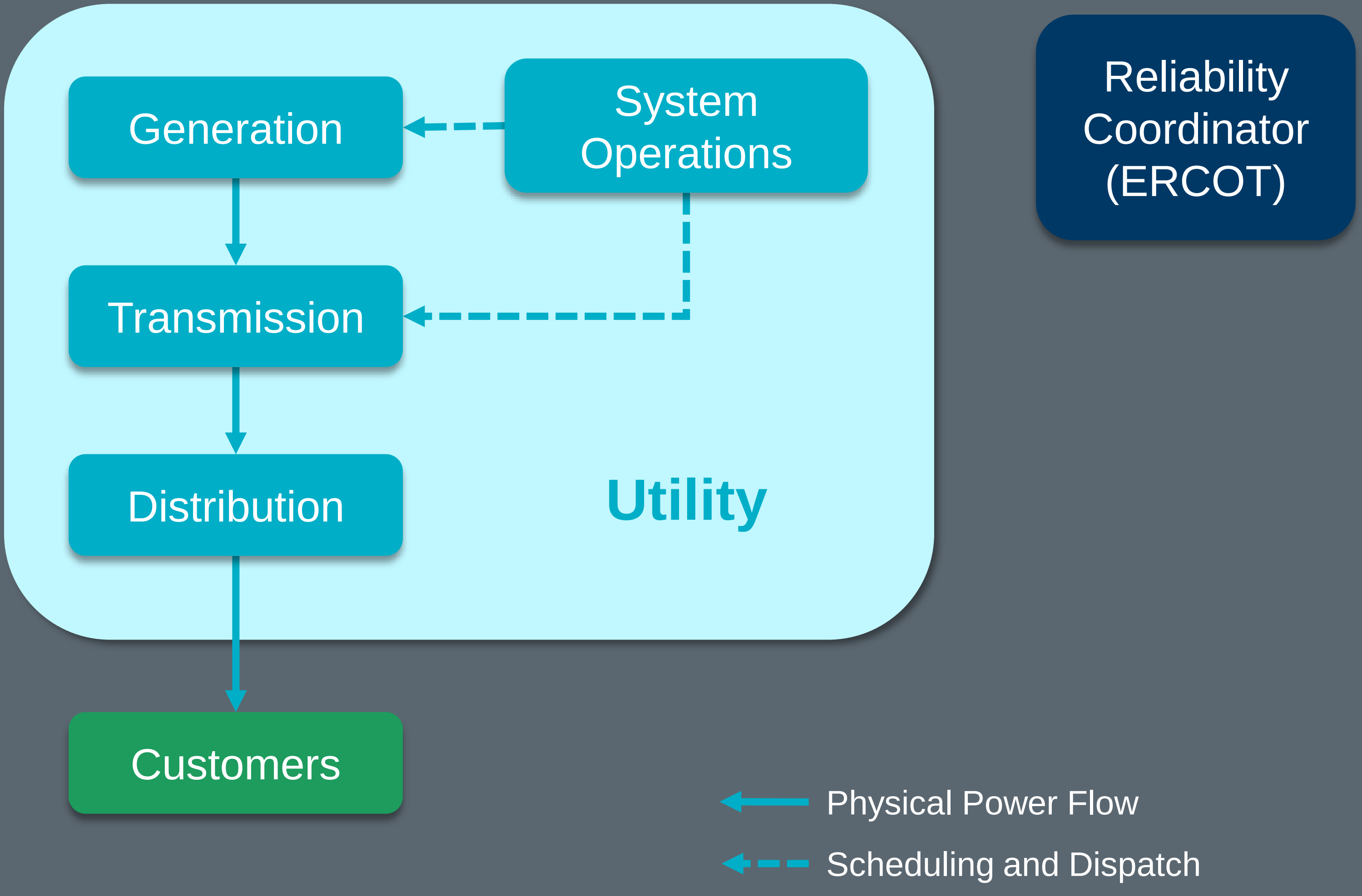
Module 1

Retail Market Responsibilities

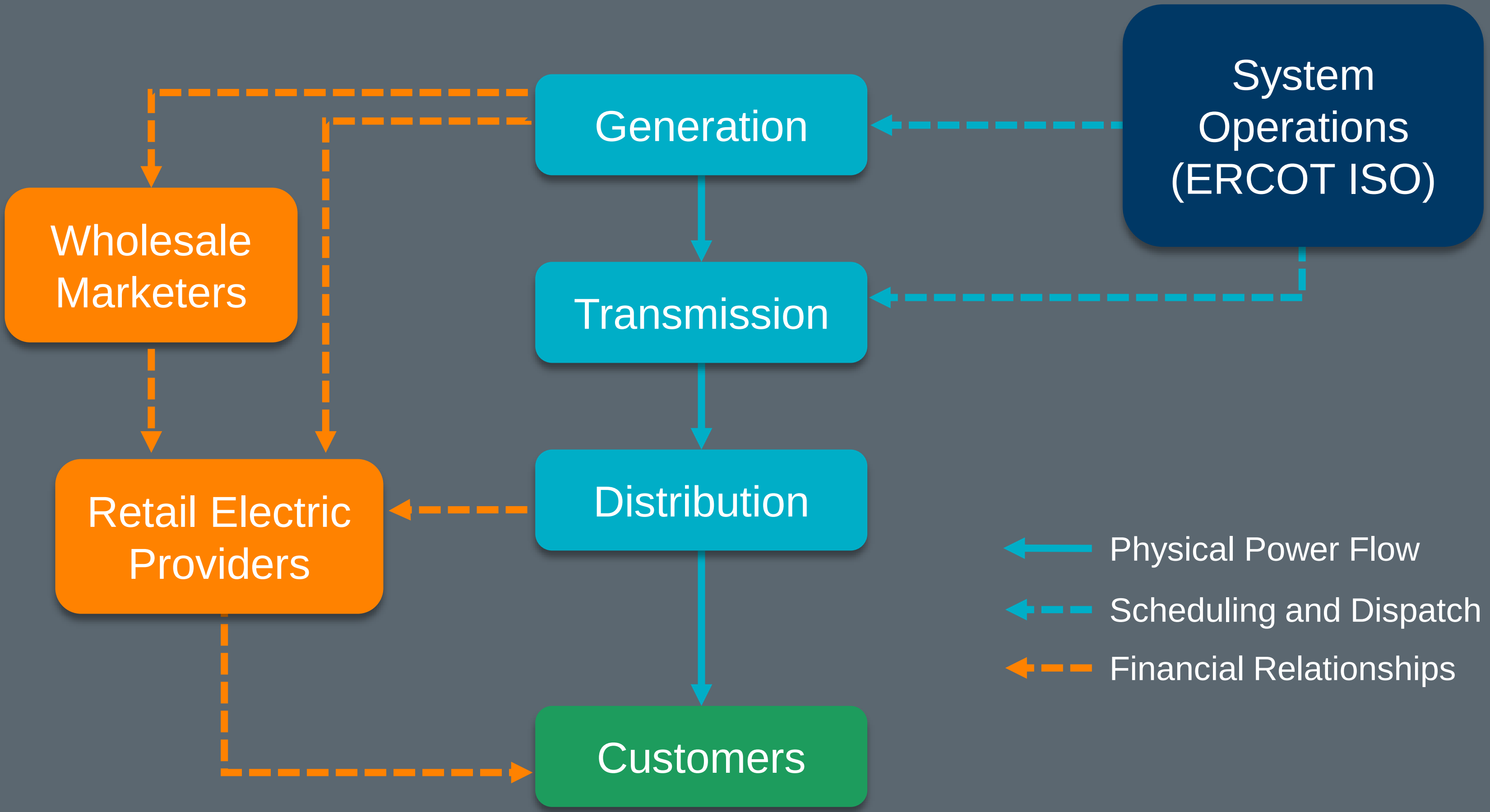
Relationships - Review


Oversight
Retail Transactions
Wholesale Settlement
PUCT
Public Utility Commission of Texas
Oversight
CR
QSE
ercot
Operations & Settlement
Oversight
Consumer Protection
Operations & Settlement
Retail Transactions
RE
TDSP
Retail Transactions
Consumer
Retail Service & Billing

Vertically Integrated Utilities


Generation
System Operations
Transmission
Distribution
Utility
Customers
Reliability Coordinator (ERCOT)
Physical Power Flow
Scheduling and Dispatch

Retail and Wholesale Competition


Generation
System Operations (ERCOT ISO)
Wholesale Marketers
Transmission
Retail Electric Providers
Distribution
Customers
Physical Power Flow
Scheduling and Dispatch
Financial Relationships

Participants

Public Utility Commission of Texas

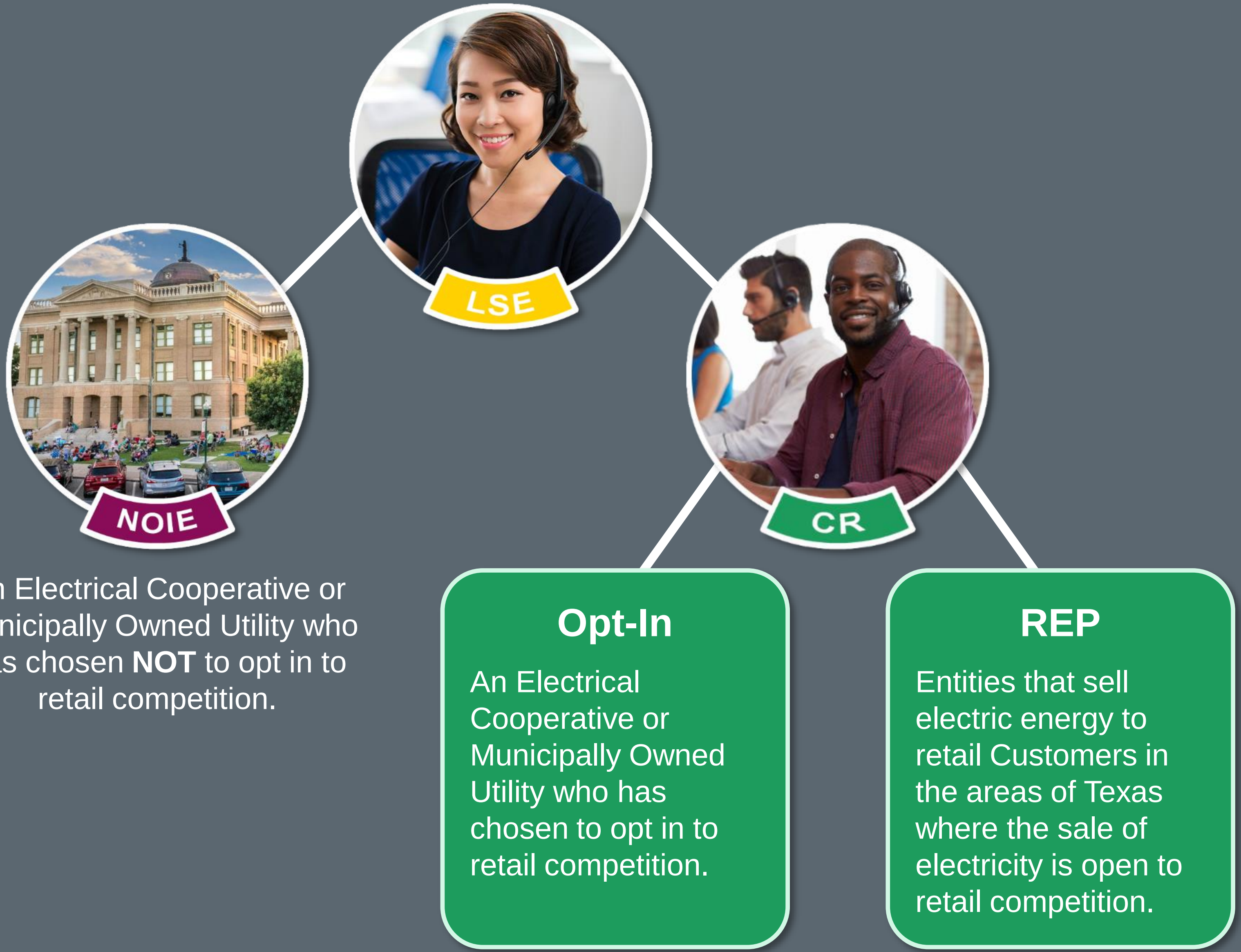
Electric Reliability Council of Texas

Qualified Scheduling Entity

Load Serving Entity

Competitive Retailer

Load Serving Entities (LSEs)



LSE

NOIE

An Electrical Cooperative or Municipally Owned Utility who has chosen **NOT** to opt in to retail competition.

CR

Opt-In

An Electrical Cooperative or Municipally Owned Utility who has chosen to opt in to retail competition.

REP

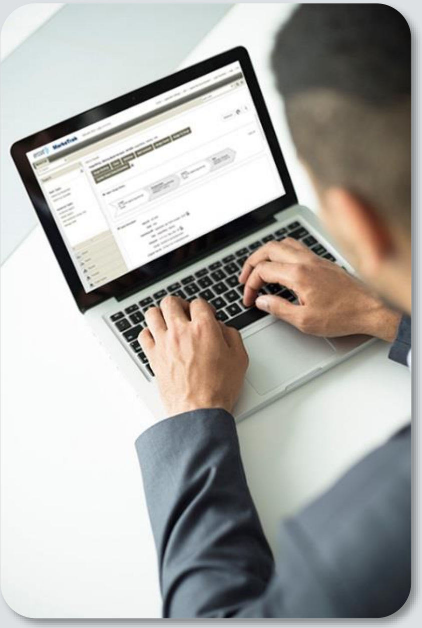
Entities that sell electric energy to retail Customers in the areas of Texas where the sale of electricity is open to retail competition.

Competitive Retailer (CR) Responsibilities

Retail Electric Provider or Opt-In Entity

Service Retail Customers

Negotiate Competitive Contracts



Submit Electronic Transactions

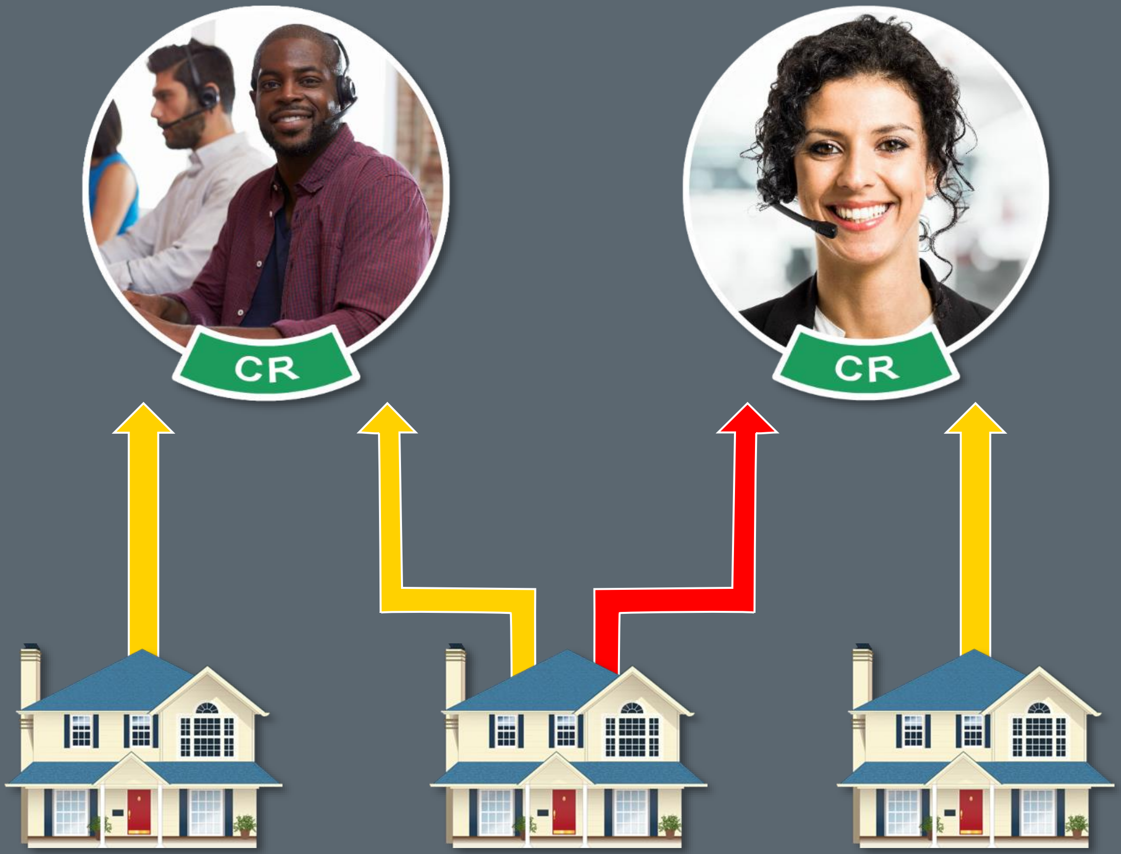
Competitive Retailer (CR) Responsibilities

Meet Financial Responsibilities

- Buy electricity at wholesale
- Pay TDSPs for delivery costs
- Pay and/or dispute invoices
- Invoice retail Customers for their usage

Investigate Customer Switching Issues

CRs work with TDSPs and other CRs to resolve inadvertent gains and losses.



A Competitive Retailer Must:

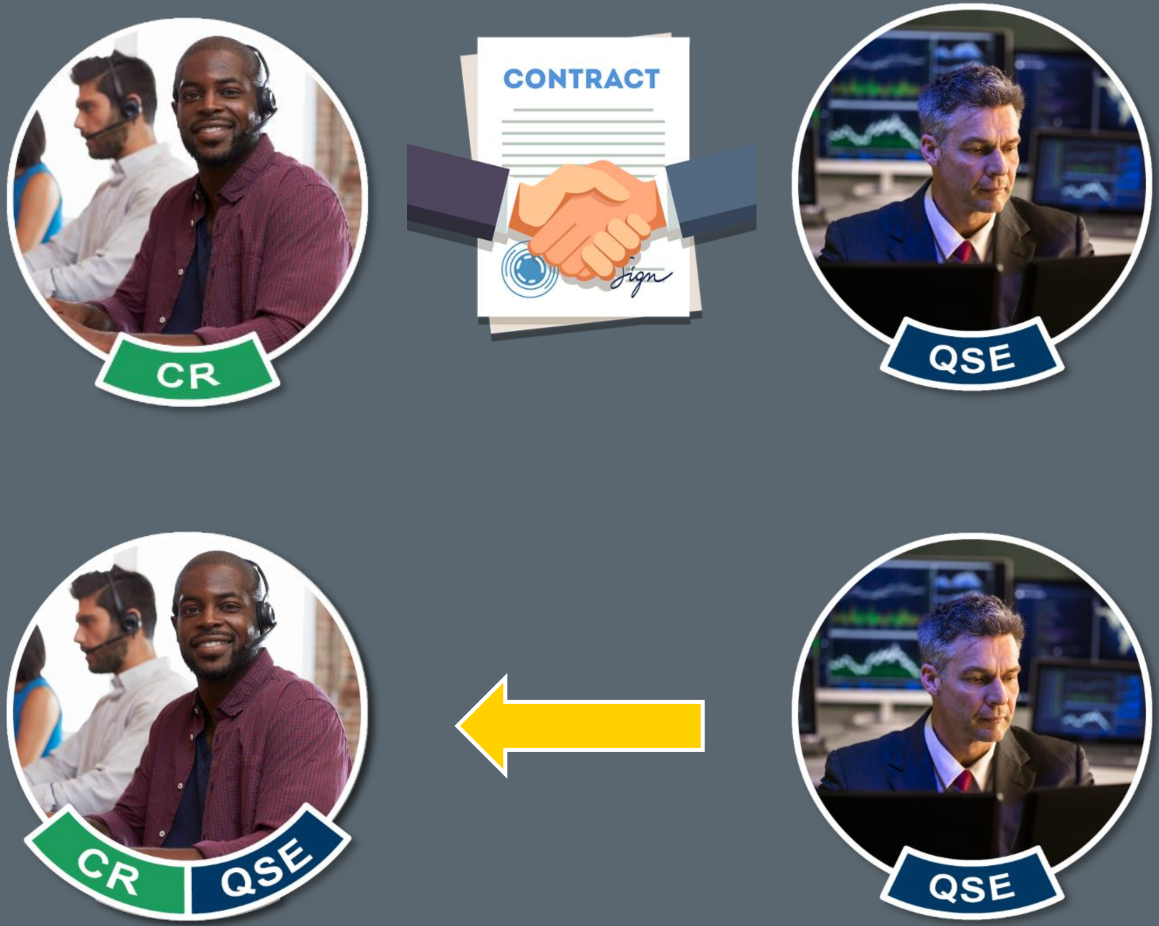
- Register with the PUCT
- Register with ERCOT
- Complete Flight Testing through FlighTrak
- Be represented by a Qualified Scheduled Entity

Every CR Must Be Represented By a QSE

Choose one

OR

Become one


CR
CONTRACT
Sign
QSE
CR
QSE
QSE

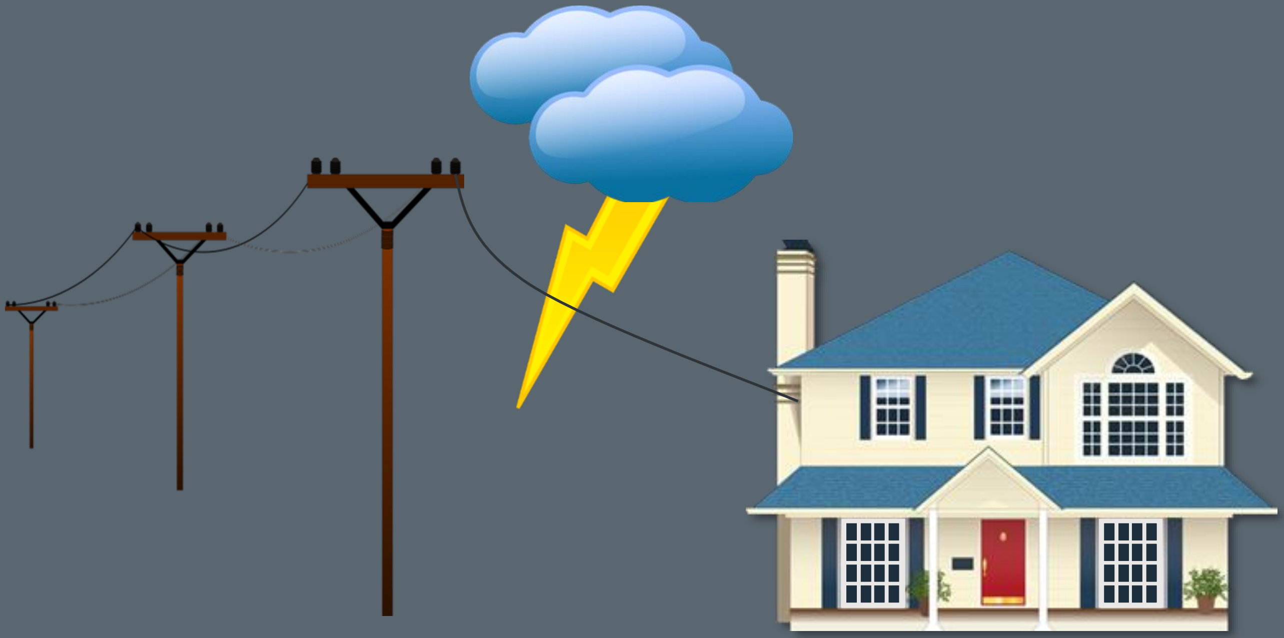
TDSP Responsibilities

Physical System Operations

Retail System Operations

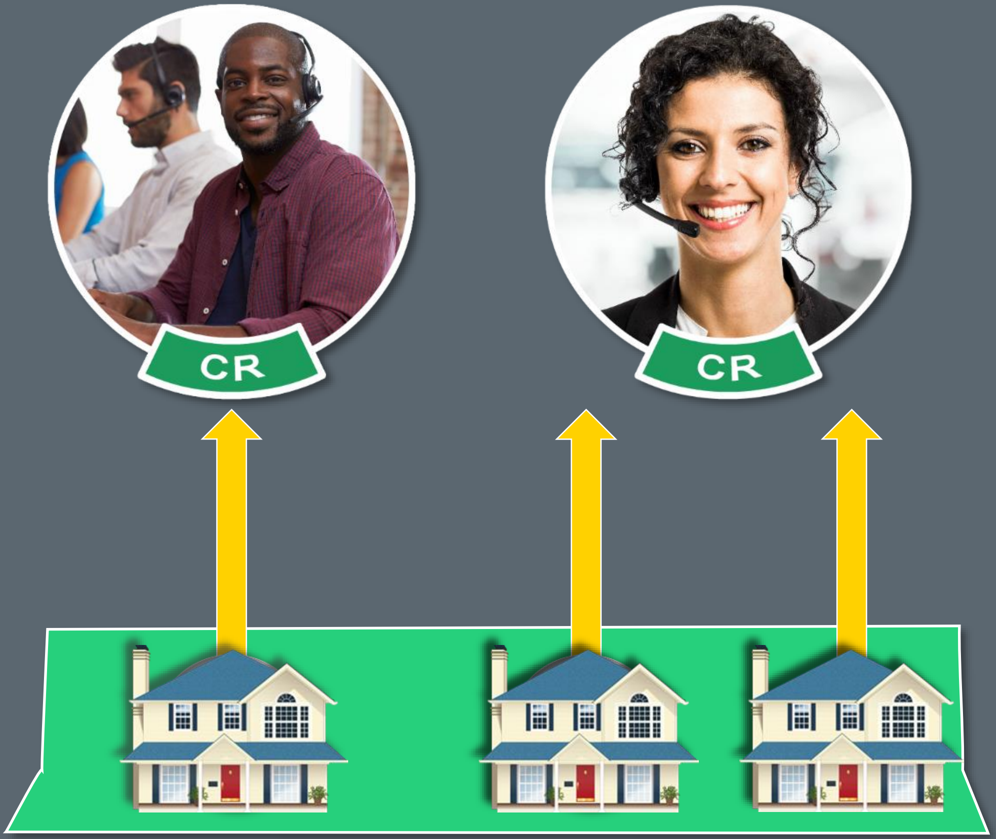
Physical System Operations

- Maintain reliable transmission and distribution system
- Connect Customer Premise to ERCOT grid
- Resolve power outages



Retail System Operations

- Create, Manage and Maintain ESI IDs
- Facilitate Service Order Requests from CRs
- Provide usage data for Settlement billing
- Investigate customer issues



The Anatomy of an ESI ID

10 xxxxx zzz .. zz

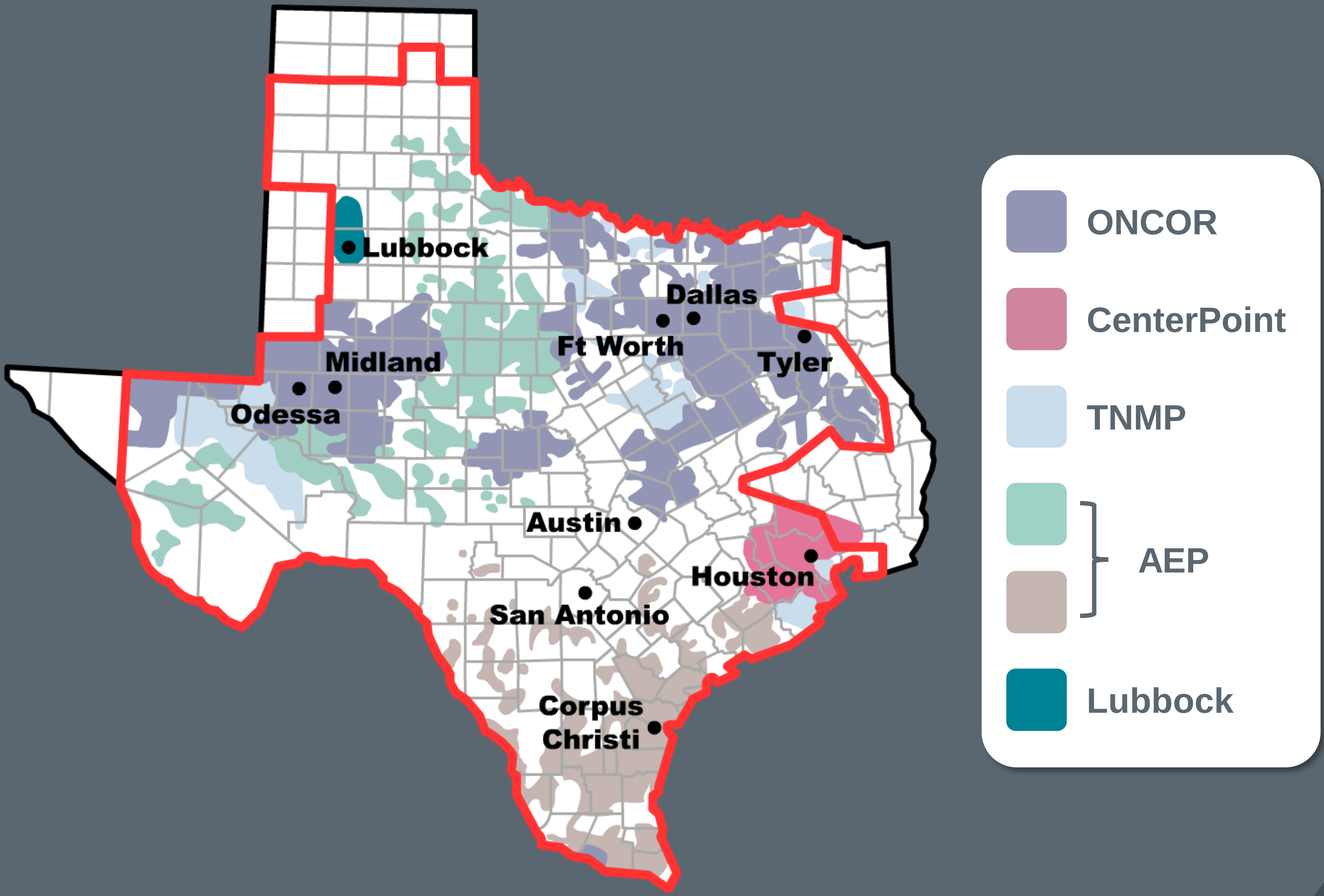
Where	
10	Electric industry prefix
xxxxx	Five-digit DOE code for TDSP
zzz .. zz	Up to 29 alphanumeric characters assigned by TDSP

The Anatomy of an ESI ID

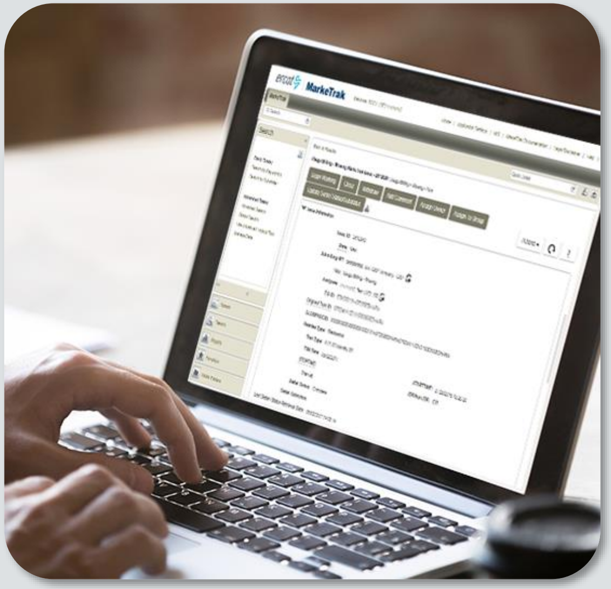
10 xxxxx zzz .. zz

DOE Number	TDSP Name
20404	AEP TX North
03278	AEP TX Central
08901	CenterPoint
13830	Nueces Electric Coop
44372	Oncor Electric Delivery
40051	Texas New Mexico Power (TNMP)
17699	Oncor/SESCO
11292	Lubbock Power & Light

Where are the competitive meters


Lubbock
Dallas
Ft Worth
Tyler
Midland
Odessa
Austin
Houston
San Antonio
Corpus Christi
ONCOR
CenterPoint
TNMP
AEP
Lubbock

ERCOT Responsibilities



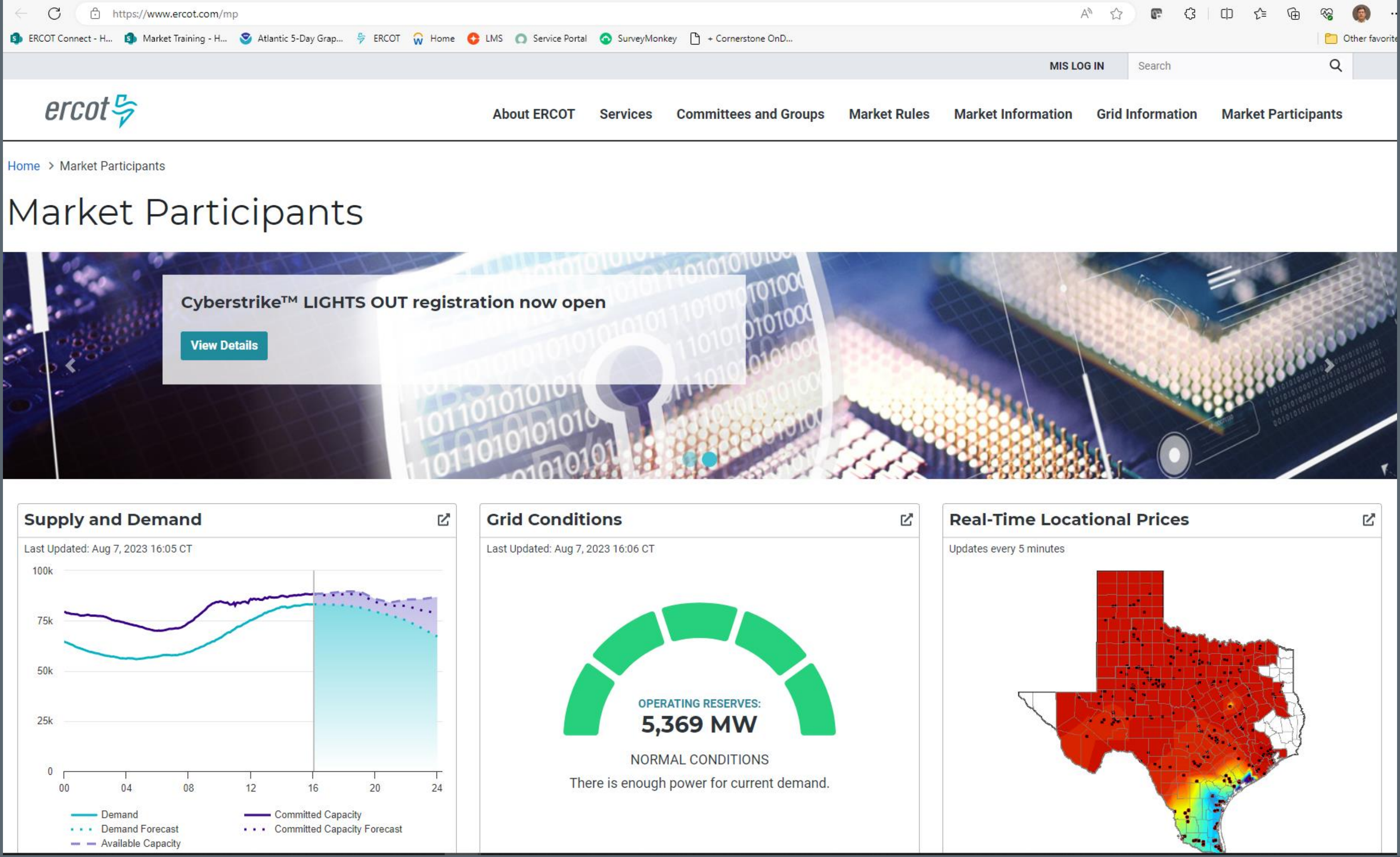
Physical System Operations

Retail System Operations

ERCOT Duties

- Process retail transactions
- Collect and distribute meter data
- Establish profiles for all ESI IDs
- Act as registration agent
- Provide account management

ERCOT.com


https://www.ercot.com/mp
ERCOT Connect - H...
Market Training - H...
Atlantic 5-Day Grap...
ERCOT
Home
LMS
Service Portal
SurveyMonkey
+ Cornerstone OnD...
Other favorite
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Grid Information
Market Participants

Home > Market Participants

Market Participants

Cyberstrike™ LIGHTS OUT registration now open

View Details

Supply and Demand

Last Updated: Aug 7, 2023 16:05 CT

100k
75k
50k
25k
0
00
04
08
12
16
20
24
Demand
Demand Forecast
Available Capacity
Committed Capacity
Committed Capacity Forecast

Grid Conditions

Last Updated: Aug 7, 2023 16:06 CT

OPERATING RESERVES:
5,369 MW

NORMAL CONDITIONS

There is enough power for current demand.

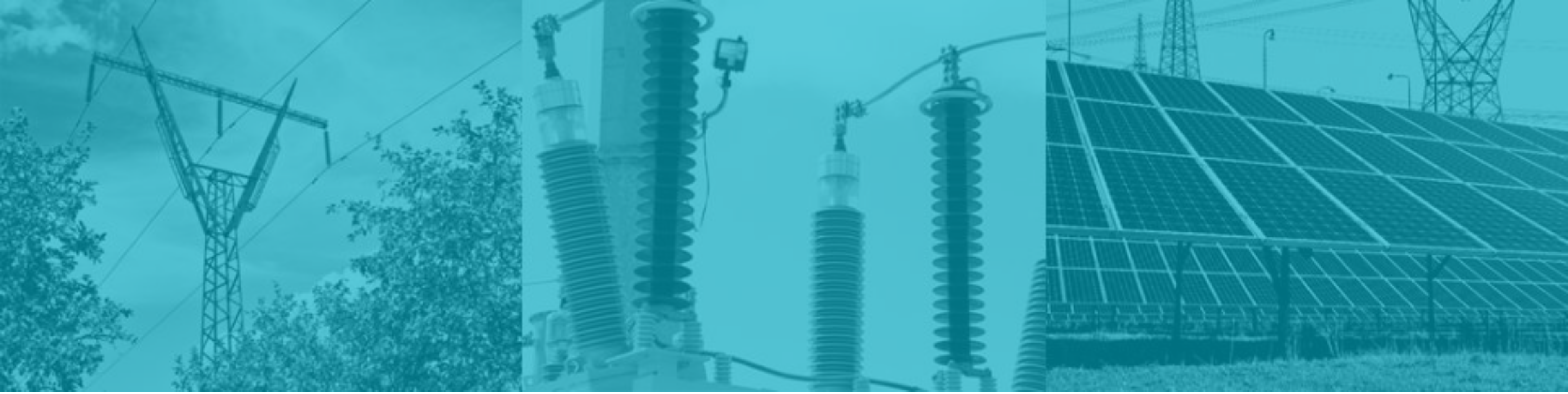
Real-Time Locational Prices

Updates every 5 minutes

Matching

QSE **LSE** **CR** **TDSP** **RE** **PUCT**

	Responsible for making sure customers are protected and everyone follows the rules
	The participant responsible for settling with ERCOT
	Services customers in competitive areas
	Manages poles, wires, meter reads and ESI IDs
	Owns and operates the generators
	General term for entity providing power to end-use customers



Module 2

Market Rules

Hierarchy of Rules

Public Utility Regulatory Act (PURA)

PUCT Substantive Rules

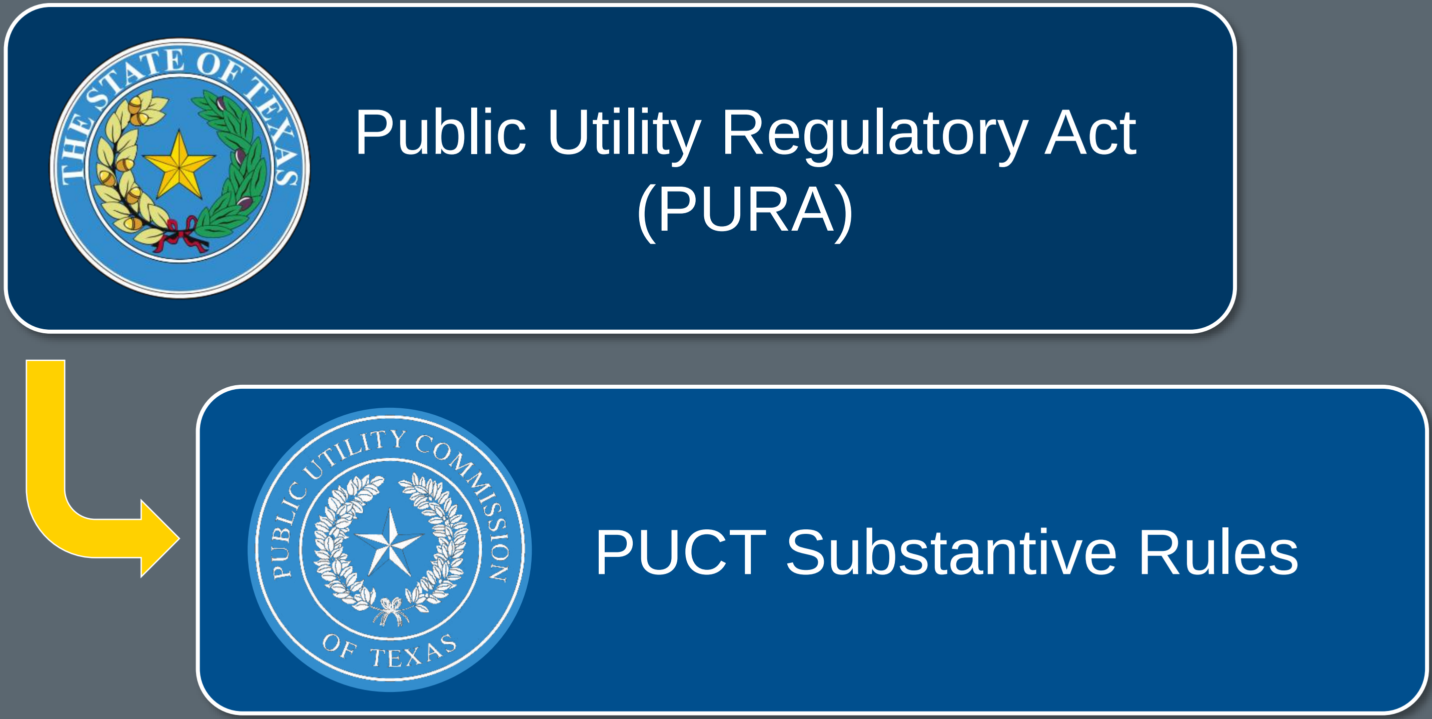
ERCOT Protocols and Market Guides

State of Texas Law

Public Utility Regulatory Act (PURA)

- Defines the Public Utility Commission of Texas (PUCT)
- Amended by Senate Bill 7 in 1999
- PUCT and ERCOT responsible for determining specifics
- Continues to evolve

Hierarchy of Rules



Public Utility Regulatory Act (PURA)

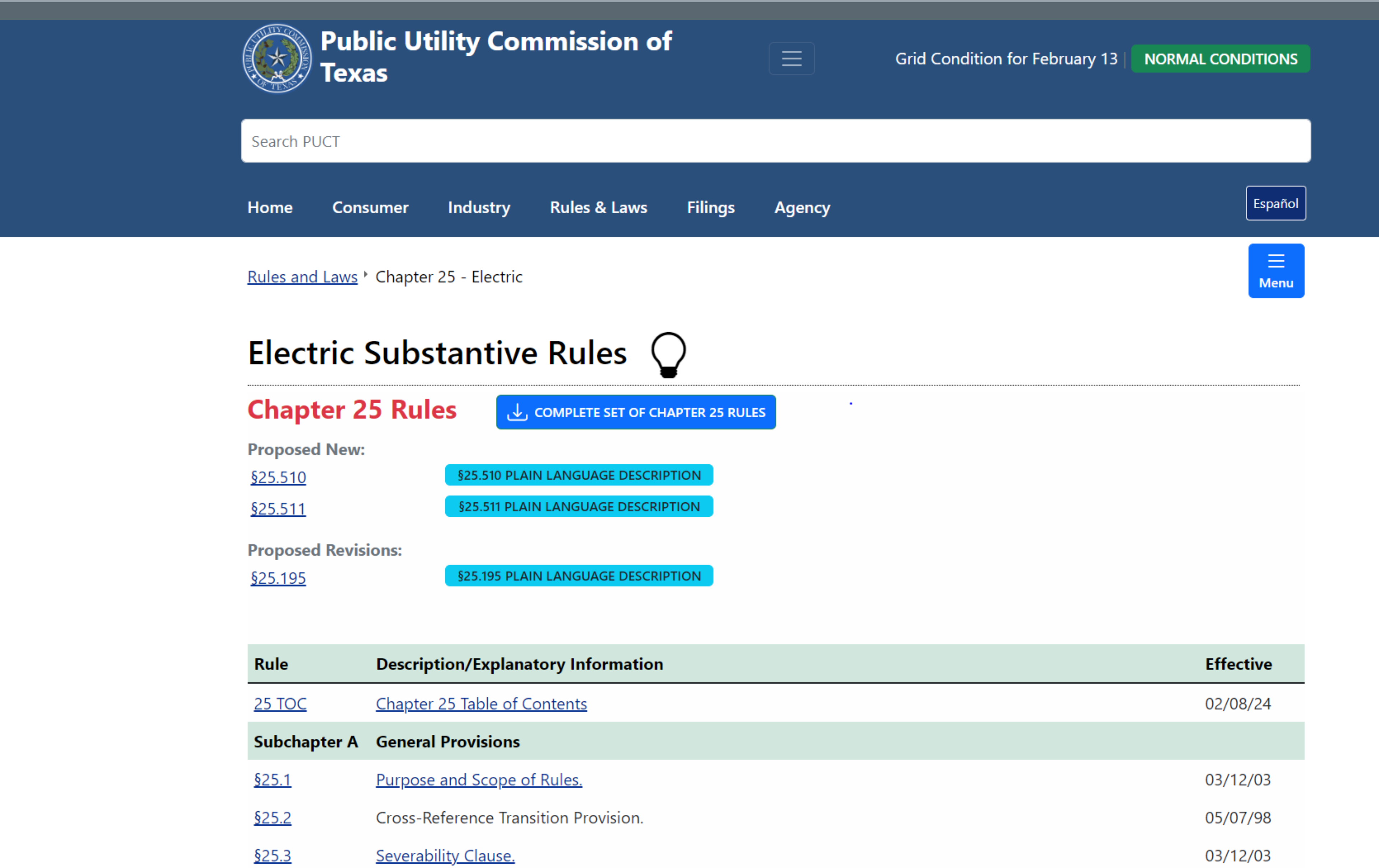
PUCT Substantive Rules

Public Utility Commission of Texas (PUCT) Rules

PUCT Substantive Rules

- Implement PURA requirements:
  - Customer protection rules
  - Standard terms and conditions (Tariffs) for utilities
- Electric Substantive Rules are contained in Chapter 25
- Refer to PUCT Website for complete rules

PUCT Substantive Rules


Public Utility Commission of Texas
Grid Condition for February 13
NORMAL CONDITIONS
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Filings
Agency
Español
Menu
Rules and Laws
Chapter 25 - Electric
COMPLETE SET OF CHAPTER 25 RULES

Electric Substantive Rules

Chapter 25 Rules

Proposed New:

§25.510	§25.510 PLAIN LANGUAGE DESCRIPTION
§25.511	§25.511 PLAIN LANGUAGE DESCRIPTION

Proposed Revisions:

§25.195	§25.195 PLAIN LANGUAGE DESCRIPTION

Rule	Description/Explanatory Information	Effective
25 TOC	Chapter 25 Table of Contents	02/08/24
Subchapter A	**General Provisions**	
§25.1	Purpose and Scope of Rules.	03/12/03
§25.2	Cross-Reference Transition Provision.	05/07/98
§25.3	Severability Clause.	03/12/03

PUCT Substantive Rules

Customer Protection Rules (Part 1)

§ 25.471	General Provisions of Customer Protection Rules	§ 25.478	Credit Requirements and Deposits
§ 25.472	Privacy of Customer Information	§ 25.479	Issuance and Format of Bills
§ 25.473	Non-English Language Requirements	§ 25.480	Bill Payment and Adjustments
§ 25.474	Selection of REP	§ 25.481	Unauthorized Charges
§ 25.475	General REP Requirements and Information Disclosures to Customers	§ 25.482	Prompt Payment Act
§ 25.476	Renewable and Green Energy Verification	§ 25.483	Disconnection of Service
§ 25.477	Refusal of Electric Service	§ 25.484	Electric No-Call List

PUCT Substantive Rules

Customer Protection Rules (Part 2)

§ 25.485	Customer Access and Complaint Handling	§ 25.492	Non-Compliance with Rules or Orders
§ 25.487	Obligations Related to Move-In Transactions	§ 25.493	Acquisition and Transfer of Customers from one REP to Another
§ 25.488	Procedures for a Premise with No Service Agreement	§ 25.495	Unauthorized Change of REP
§ 25.489	Treatment of Premises with No Retail Electric Provider of Record	§ 25.497	Critical Load, Critical Care and Chronic Condition Customers
§ 25.490	Moratorium on Disconnect on Move-Out	§ 25.498	Prepaid Service
§ 25.491	Record Retention and Reporting Requirements	§ 25.500	Privacy of Advanced Metering System Information

Hierarchy of Rules

THE STATE OF TEXAS

Public Utility Regulatory Act (PURA)

PUCT Substantive Rules

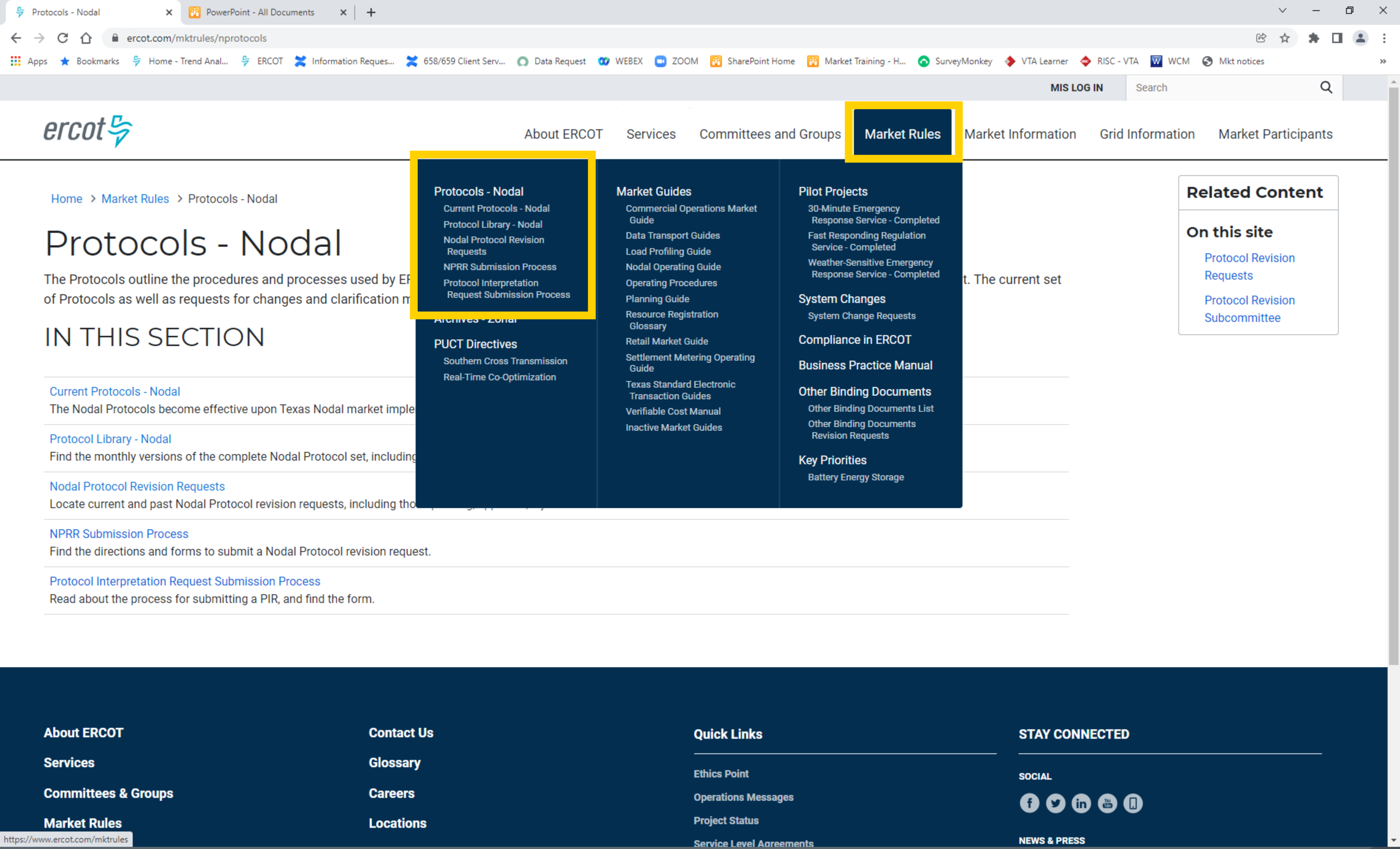
ERCOT Protocols and Market Guides

ERCOT is responsible for …

Protocols

Outline the procedures and processes used by ERCOT and Market Participants.

ERCOT Protocols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Protocols - Nodal

The Protocols outline the procedures and processes used by EF … t. The current set of Protocols as well as requests for changes and clarification m…

IN THIS SECTION

Current Protocols - Nodal
The Nodal Protocols become effective upon Texas Nodal market imple…

Protocol Library - Nodal
Find the monthly versions of the complete Nodal Protocol set, including…

Nodal Protocol Revision Requests
Locate current and past Nodal Protocol revision requests, including tho…

NPRR Submission Process
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Protocol Interpretation Request Submission Process
Read about the process for submitting a PIR, and find the form.

Protocols - Nodal
- Current Protocols - Nodal
- Protocol Library - Nodal
- Nodal Protocol Revision Requests
- NPRR Submission Process
- Protocol Interpretation Request Submission Process

Archives - Zonal

PUCT Directives
- Southern Cross Transmission
- Real-Time Co-Optimization

Market Guides
- Commercial Operations Market Guide
- Data Transport Guides
- Load Profiling Guide
- Nodal Operating Guide
- Operating Procedures
- Planning Guide
- Resource Registration Glossary
- Retail Market Guide
- Settlement Metering Operating Guide
- Texas Standard Electronic Transaction Guides
- Verifiable Cost Manual
- Inactive Market Guides

Pilot Projects
- 30-Minute Emergency Response Service - Completed
- Fast Responding Regulation Service - Completed
- Weather-Sensitive Emergency Response Service - Completed

System Changes
- System Change Requests

Compliance in ERCOT

Business Practice Manual

Other Binding Documents
- Other Binding Documents List
- Other Binding Documents Revision Requests

Key Priorities
- Battery Energy Storage

Related Content

On this site
- Protocol Revision Requests
- Protocol Revision Subcommittee

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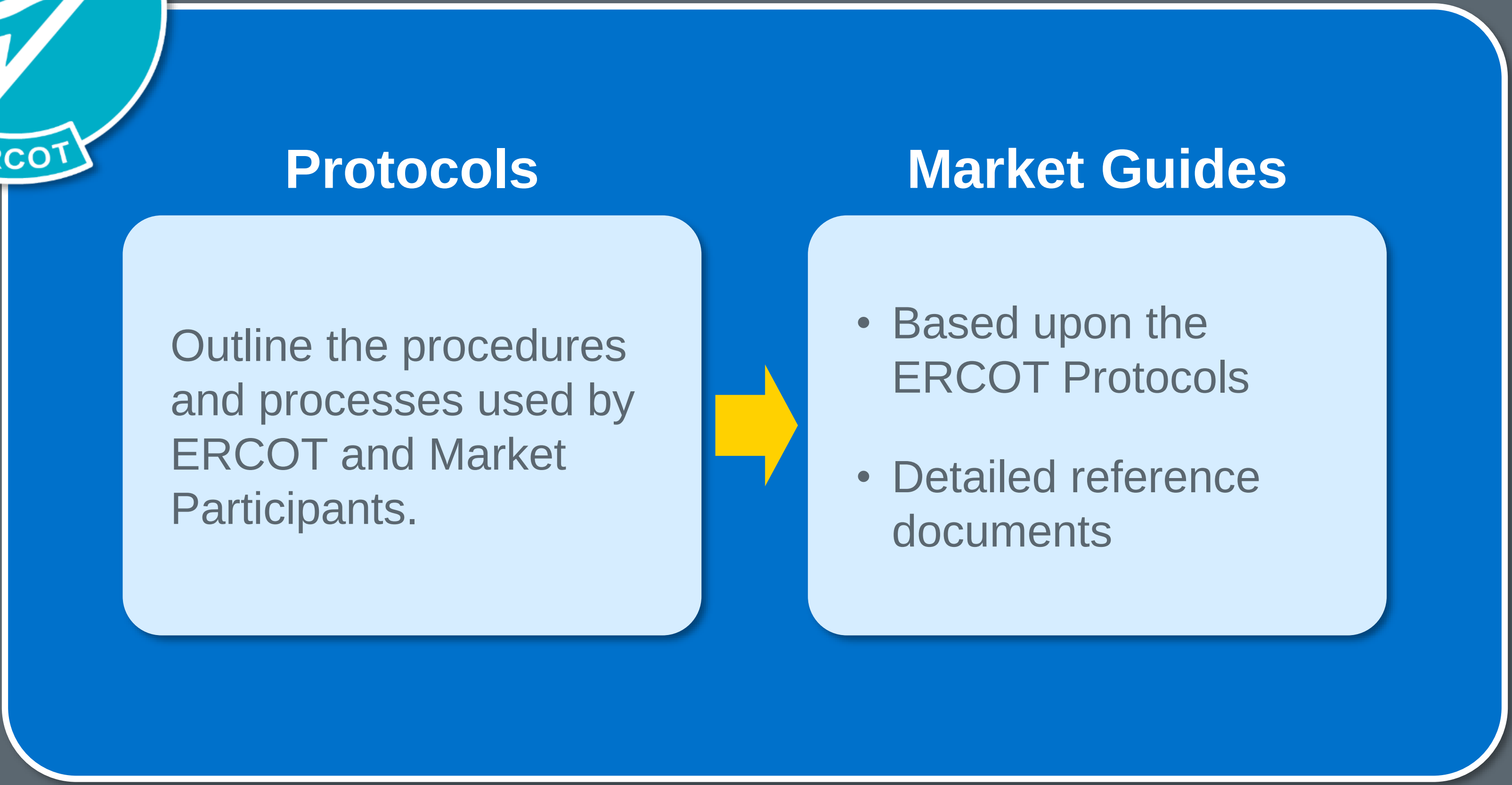
Protocol Sections

List of Protocols

Sections	Description
1-2	Construction and Definitions
3-8	System Operations and Wholesale Markets
9-11	Settlement & Billing; Metering; Data Aggregation
12	Market Information System (MIS)
13	Transmission & Distribution Losses
14	Renewable Energy Credit Trading Program
15	Customer Registration
16	Market Participant Registration & Qualification
18, 19	Load Profiling & TX SET
20	Alternative Dispute Resolution Process
21	Revision Request Process

ERCOT Documents

ERCOT is responsible for …



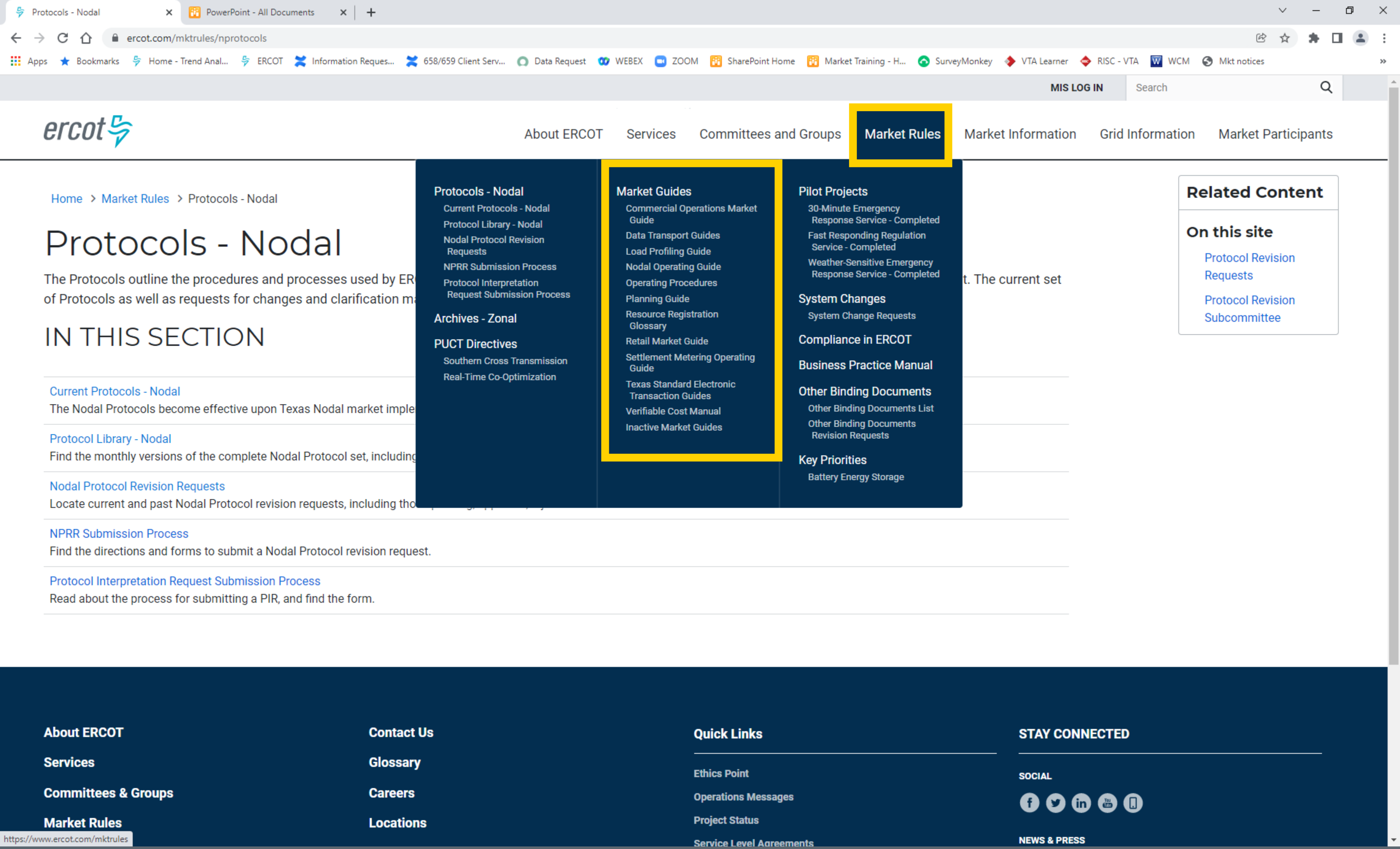
Protocols

Outline the procedures and processes used by ERCOT and Market Participants.

Market Guides

- Based upon the ERCOT Protocols
- Detailed reference documents

ERCOT Market Guides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  - Protocol Library - Nodal
  - Nodal Protocol Revision Requests
  - NPRR Submission Process
  - Protocol Interpretation Request Submission Process
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- **PUCT Directives**
  - Southern Cross Transmission
  - Real-Time Co-Optimization
- **Market Guides**
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  - Data Transport Guides
  - Load Profiling Guide
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- **System Changes**
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- **Business Practice Manual**
- **Other Binding Documents**
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- **Key Priorities**
  - Battery Energy Storage

Home > Market Rules > Protocols - Nodal

Protocols - Nodal

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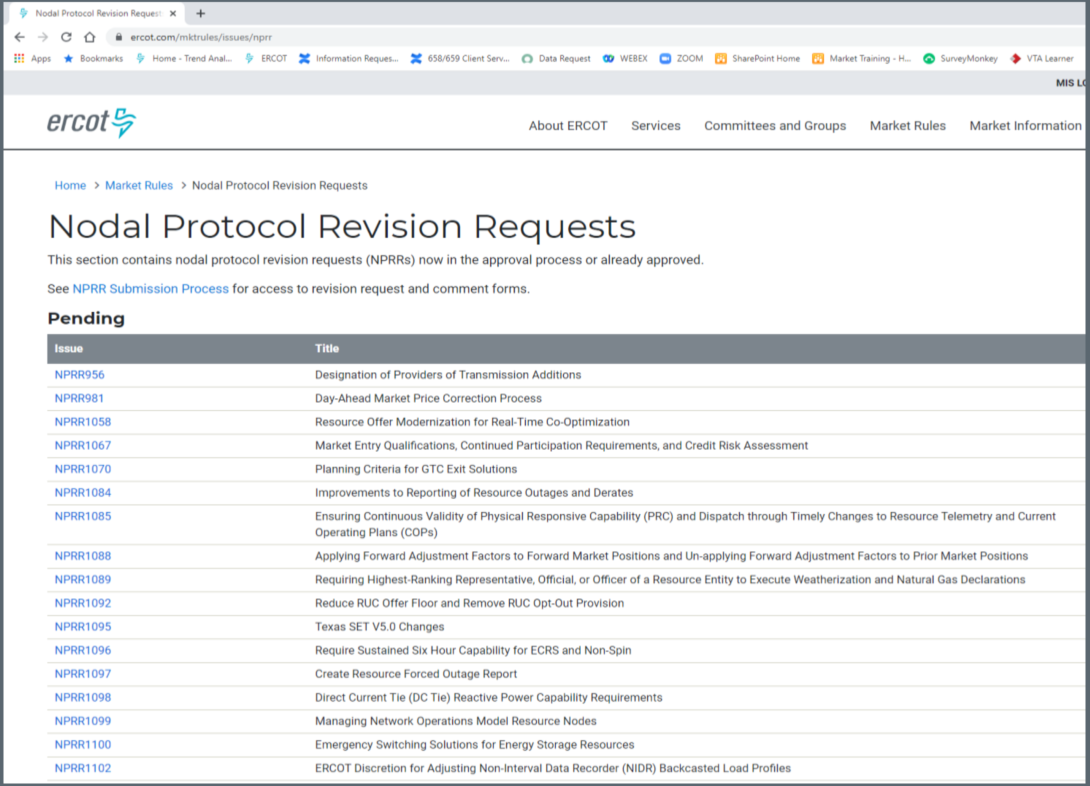
Retail Market Guide Detail

Retail Market Guide Overview

Sections	Description
1-2	Purpose; Definitions; Acronyms
3	Retail Market Guide Revision Process
4-5	PUCT & ERCOT
6	RMS Working Groups
7	*****Market Processes*****
8	Municipally Owned Utilities & Co-ops
9	Appendices

Protocol And Market Guide Update Process

- Created and edited by Market Participants
- Changed from time-to-time by Revision requests
- Changes approved by ERCOT Board of Directors or appropriate committee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Nodal Protocol Revision Requests

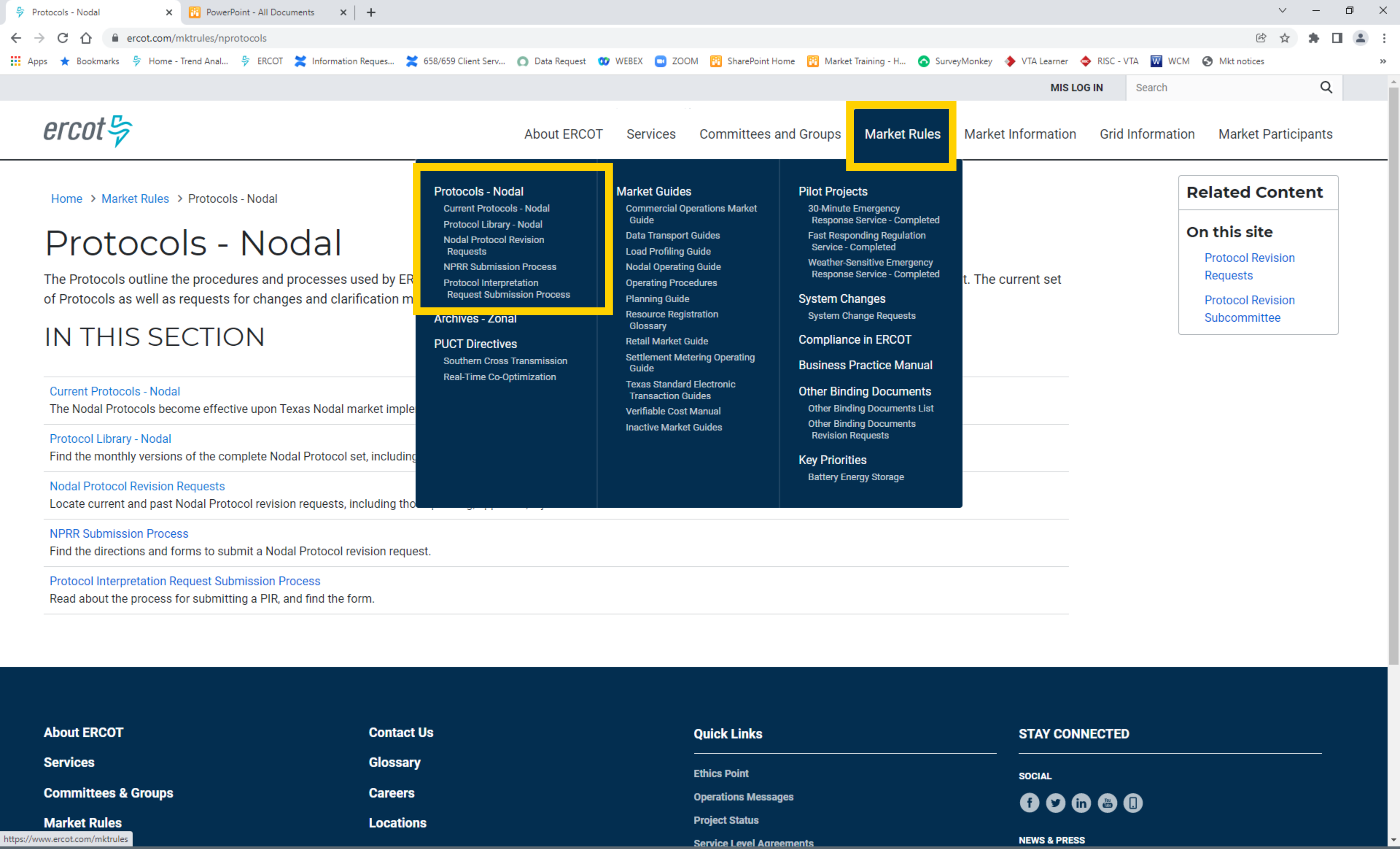
This section contains nodal protocol revision requests (NPRRs) now in the approval process or already approved.

See NPRR Submission Process for access to revision request and comment forms.

Pending

Issue	Title
NPRR956	Designation of Providers of Transmission Additions
NPRR981	Day-Ahead Market Price Correction Process
NPRR1058	Resource Offer Modernization for Real-Time Co-Optimization
NPRR1067	Market Entry Qualifications, Continued Participation Requirements, and Credit Risk Assessment
NPRR1070	Planning Criteria for GTC Exit Solutions
NPRR1084	Improvements to Reporting of Resource Outages and Derates
NPRR1085	Ensuring Continuous Validity of Physical Responsive Capability (PRC) and Dispatch through Timely Changes to Resource Telemetry and Current Operating Plans (COPs)
NPRR1088	Applying Forward Adjustment Factors to Forward Market Positions and Un-applying Forward Adjustment Factors to Prior Market Positions
NPRR1089	Requiring Highest-Ranking Representative, Official, or Officer of a Resource Entity to Execute Weatherization and Natural Gas Declarations
NPRR1092	Reduce RUC Offer Floor and Remove RUC Opt-Out Provision
NPRR1095	Texas SET V5.0 Changes
NPRR1096	Require Sustained Six Hour Capability for ECRS and Non-Spin
NPRR1097	Create Resource Forced Outage Report
NPRR1098	Direct Current Tie (DC Tie) Reactive Power Capability Requirements
NPRR1099	Managing Network Operations Model Resource Nodes
NPRR1100	Emergency Switching Solutions for Energy Storage Resources
NPRR1102	ERCOT Discretion for Adjusting Non-Interval Data Recorder (NIDR) Backcasted Load Profiles

Nodal Protocol Revision Requests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ERCOT Board and Stakeholder Groups

Approves all changes to Market Rules

PUCT

Advised by Stakeholder Groups

Board Of Directors

Makes policy recommendations

Technical Advisory Committee (TAC)

Retail Market Subcommittee (RMS)

Reliability Operations Subcommittee (ROS)

Wholesale Market Subcommittee (WMS)

Protocol Revision Subcommittee (PRS)

RMS and Working Groups

Retail Market Subcommittee (RMS)

Working Groups

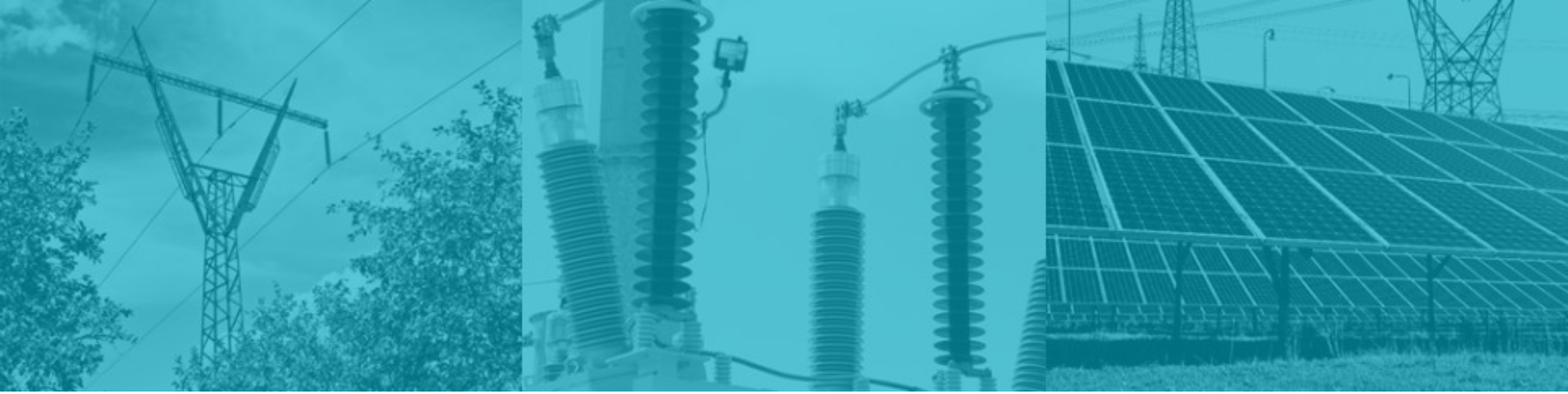
Profiling (PWG)

Texas Data Transport & MarkeTrak Systems (TDTMS)

Texas SET

Task Forces

Retail Market Training (RMTTF)



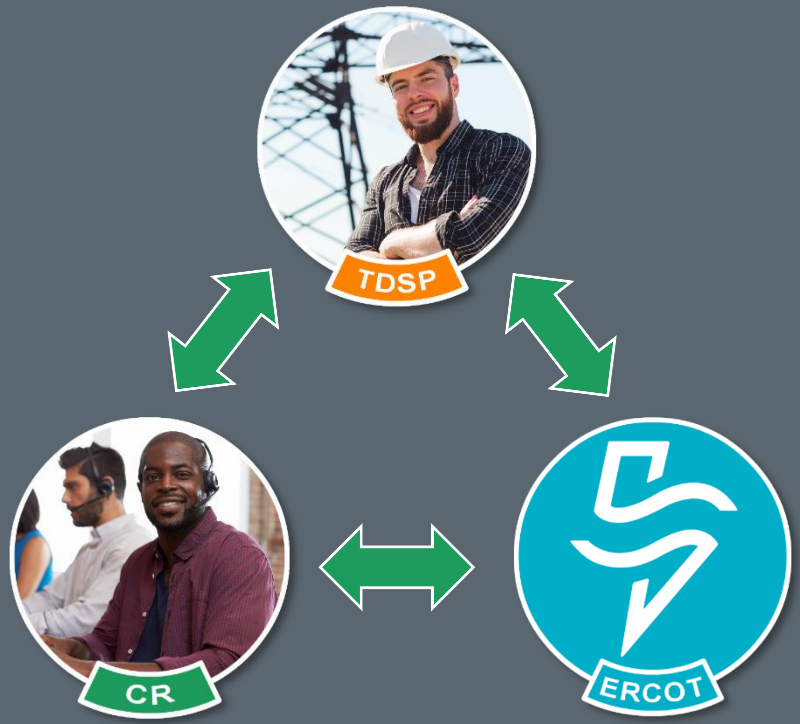
Module 3

Retail Operations

Retail Transaction:

A Communication that enables and facilitates retail business processes in the deregulated Texas Electrical Market.

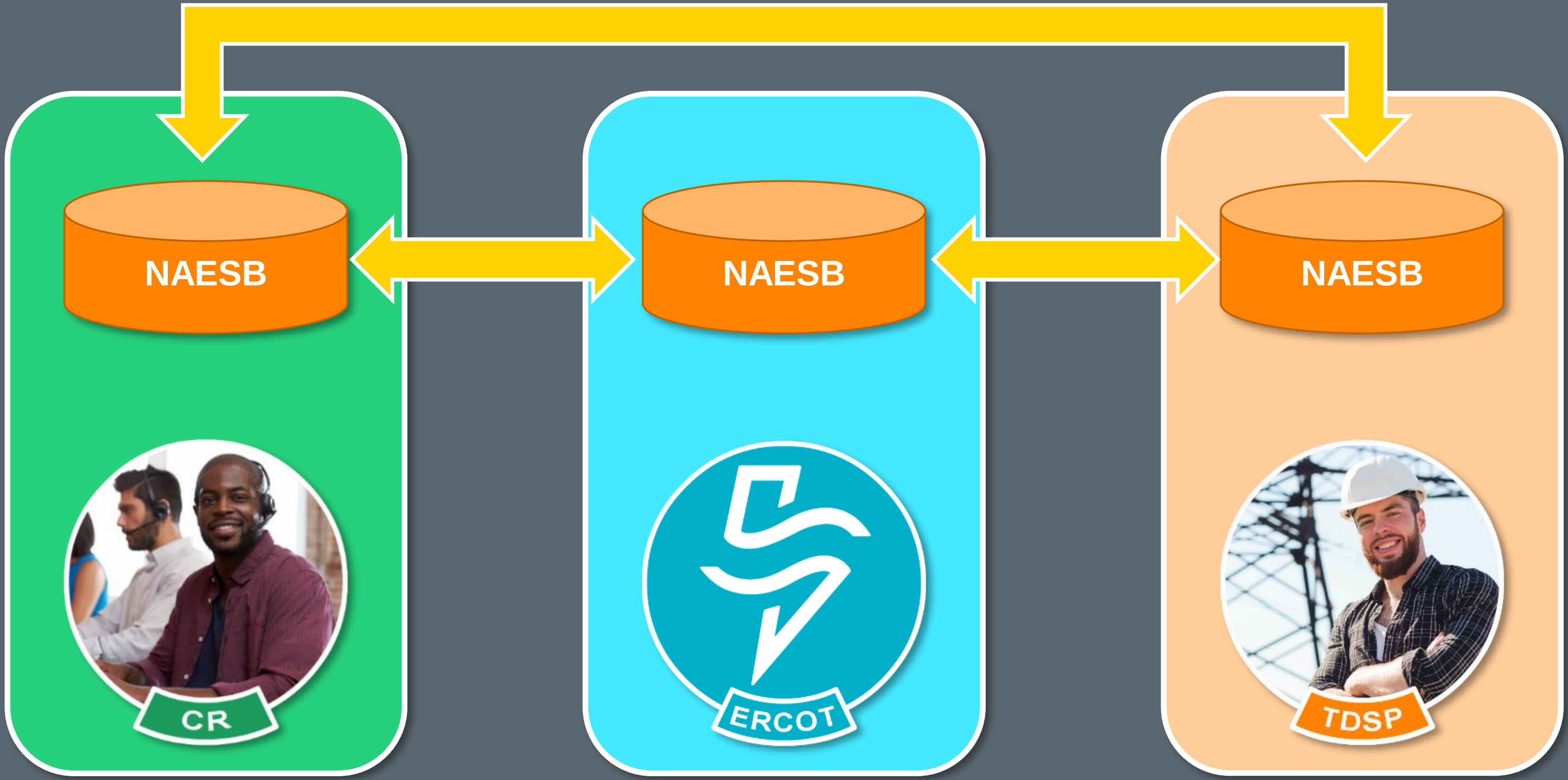
- Involves REPs, TDSPs and ERCOT
- Electronic Data Interchange (EDI) format, based on ANSI ASC X12 Standards



Retail Transactions Are Defined By TX SET Implementation Guides

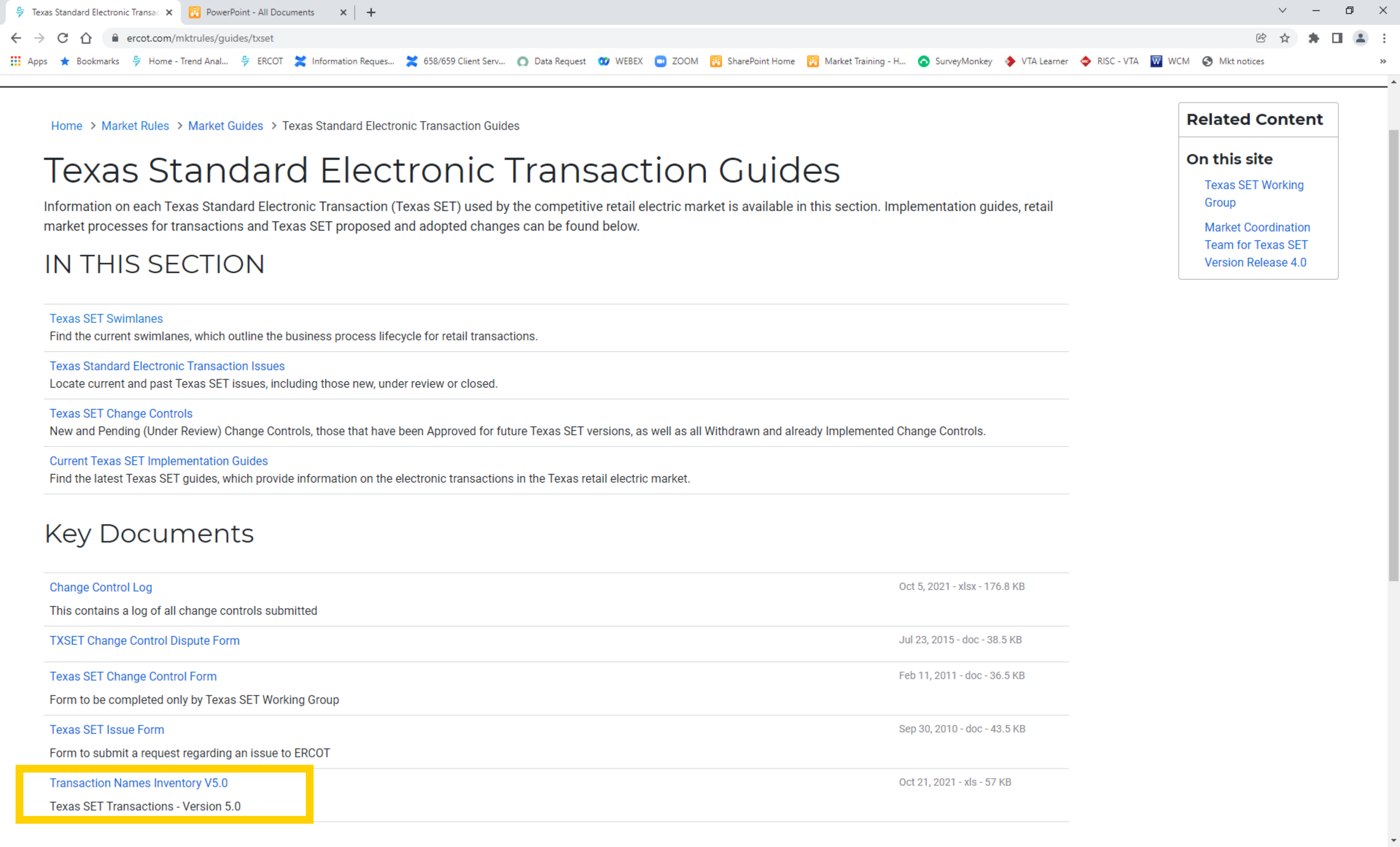
- Developed and maintained by TX SET Working Group
- Protocol Section 19
- Implementation Guides

TxSET Communication Flow - Example


NAESB
NAESB
NAESB
CR
ERCOT
TDSP

North American Energy Standards Board (NAESB)
Common communications protocol

TX SET – Transaction Names & Pocket Card


Texas Standard Electronic Transac
PowerPoint - All Documents
ercot.com/mktrules/guides/txset
Apps
Bookmarks
Home - Trend Anal...
ERCOT
Information Reques...
658/659 Client Serv...
Data Request
WEBEX
ZOOM
SharePoint Home
Market Training - H...
SurveyMonkey
VTA Learner
RISC - VTA
WCM
Mkt notices

Home > Market Rules > Market Guides > Texas Standard Electronic Transaction Guides

Texas Standard Electronic Transaction Guides

Information on each Texas Standard Electronic Transaction (Texas SET) used by the competitive retail electric market is available in this section. Implementation guides, retail market processes for transactions and Texas SET proposed and adopted changes can be found below.

IN THIS SECTION

Texas SET Swimlanes
Find the current swimlanes, which outline the business process lifecycle for retail transactions.

Texas Standard Electronic Transaction Issues
Locate current and past Texas SET issues, including those new, under review or closed.

Texas SET Change Controls
New and Pending (Under Review) Change Controls, those that have been Approved for future Texas SET versions, as well as all Withdrawn and already Implemented Change Controls.

Current Texas SET Implementation Guides
Find the latest Texas SET guides, which provide information on the electronic transactions in the Texas retail electric market.

Key Documents

Change Control Log This contains a log of all change controls submitted	Oct 5, 2021 - xlsx - 176.8 KB
TXSET Change Control Dispute Form	Jul 23, 2015 - doc - 38.5 KB
Texas SET Change Control Form Form to be completed only by Texas SET Working Group	Feb 11, 2011 - doc - 36.5 KB
Texas SET Issue Form Form to submit a request regarding an issue to ERCOT	Sep 30, 2010 - doc - 43.5 KB
Transaction Names Inventory V5.0 Texas SET Transactions - Version 5.0	Oct 21, 2021 - xls - 57 KB

Related Content

On this site

Texas SET Working Group

Market Coordination Team for Texas SET Version Release 4.0

Standard Transactions

Transaction Families	
Request, Response, Maintenance for Enrollments, Drops, Switches, Maintenance & Request Consumption	**814_XX**
Interval, Non Interval, Reads & Usage Data Historical and Monthly Activity	**867_XX**
Reject Response to 810 or 867 Data	**824_XX**

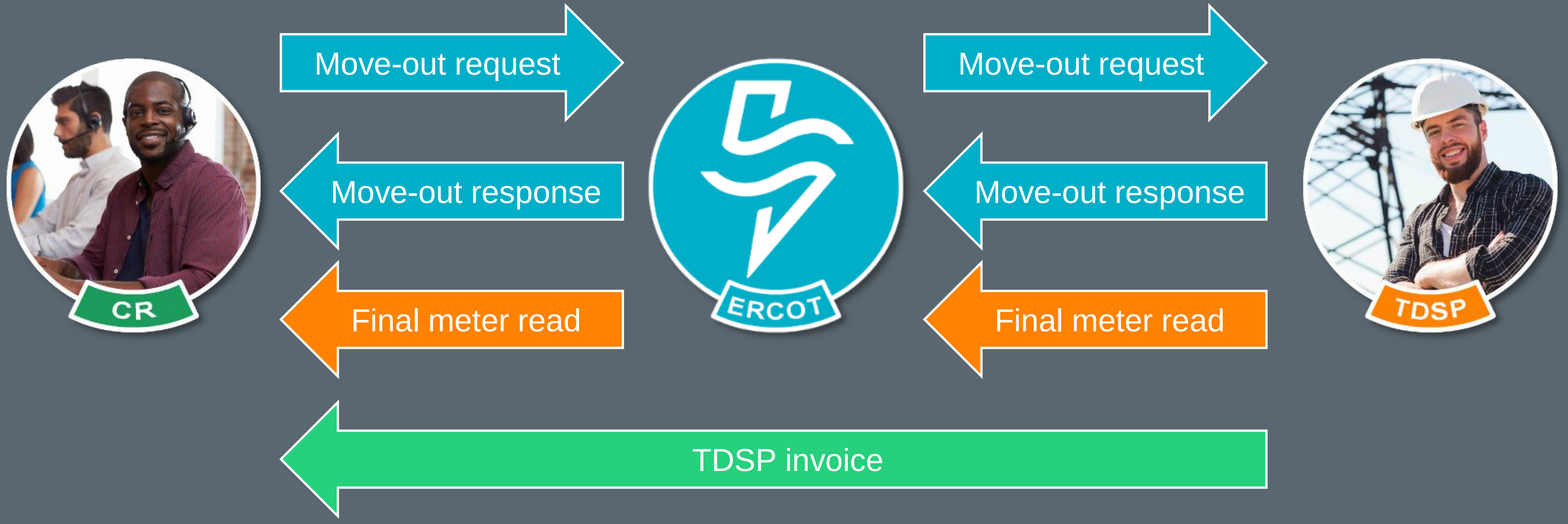
Standard Transactions

Transaction Families	
Statement, Settlement, Wire Charge Invoices	**810_XX**
Payment and Advice through Bank	**820_XX**
Maintenance Service Order - Work Orders, Meter Config. Details, Outage Notification	**650_XX**
Reject Response to 810 or 867 Data	**824_XX**

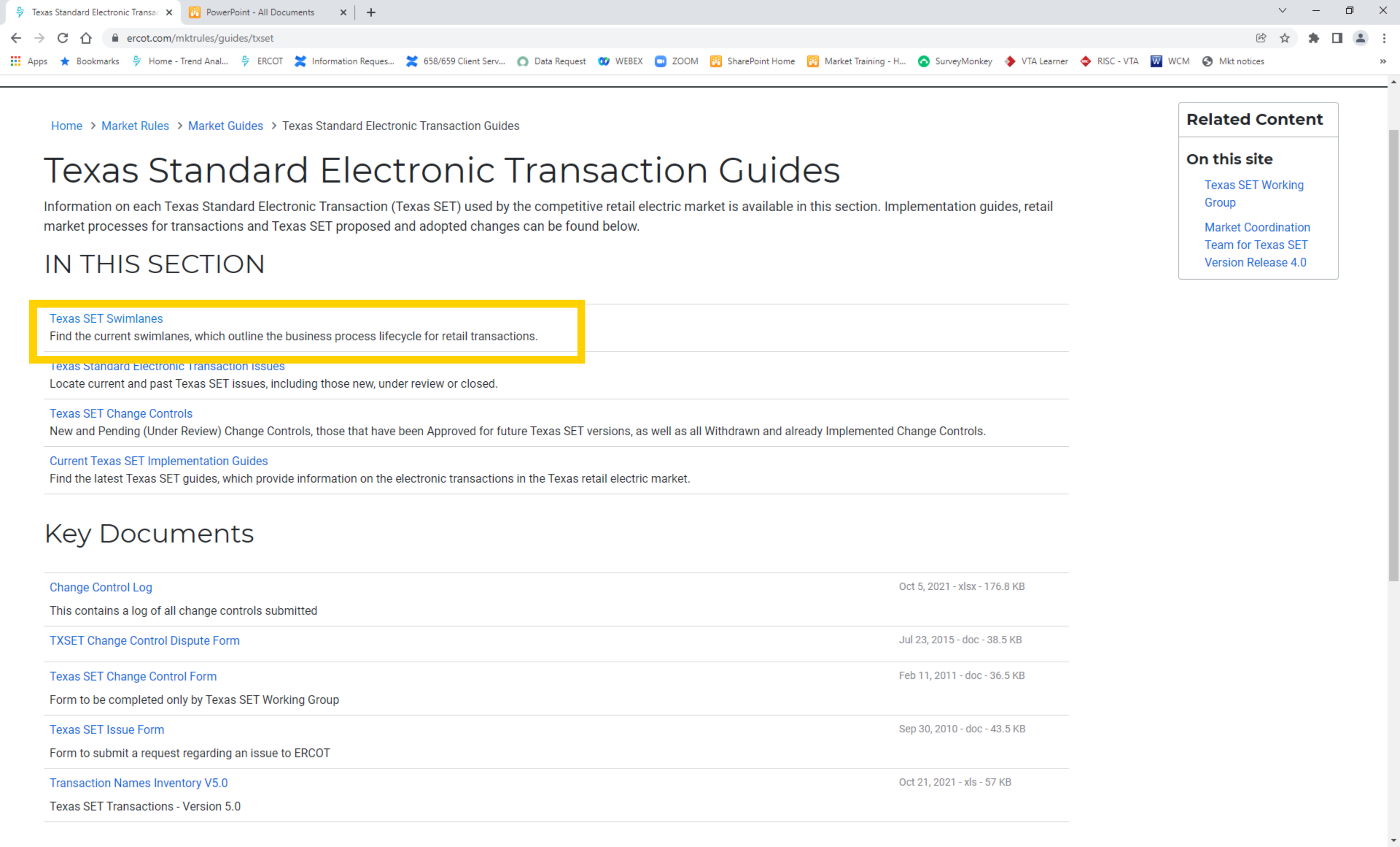
More detailed description in Protocol Section 19

Market Process

A series of retail transactions that must occur in a particular sequence


Move-out request
Move-out request
CR
ERCOT
TDSP
Move-out response
Move-out response
Final meter read
Final meter read
TDSP invoice

Swimlanes


Texas Standard Electronic Transac
PowerPoint - All Documents
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Apps
Bookmarks
Home - Trend Anal...
ERCOT
Information Reques...
658/659 Client Serv...
Data Request
WEBEX
ZOOM
SharePoint Home
Market Training - H...
SurveyMonkey
VTA Learner
RISC - VTA
WCM
Mkt notices

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Transaction Names Inventory V5.0 Texas SET Transactions - Version 5.0	Oct 21, 2021 - xls - 57 KB

Related Content

On this site

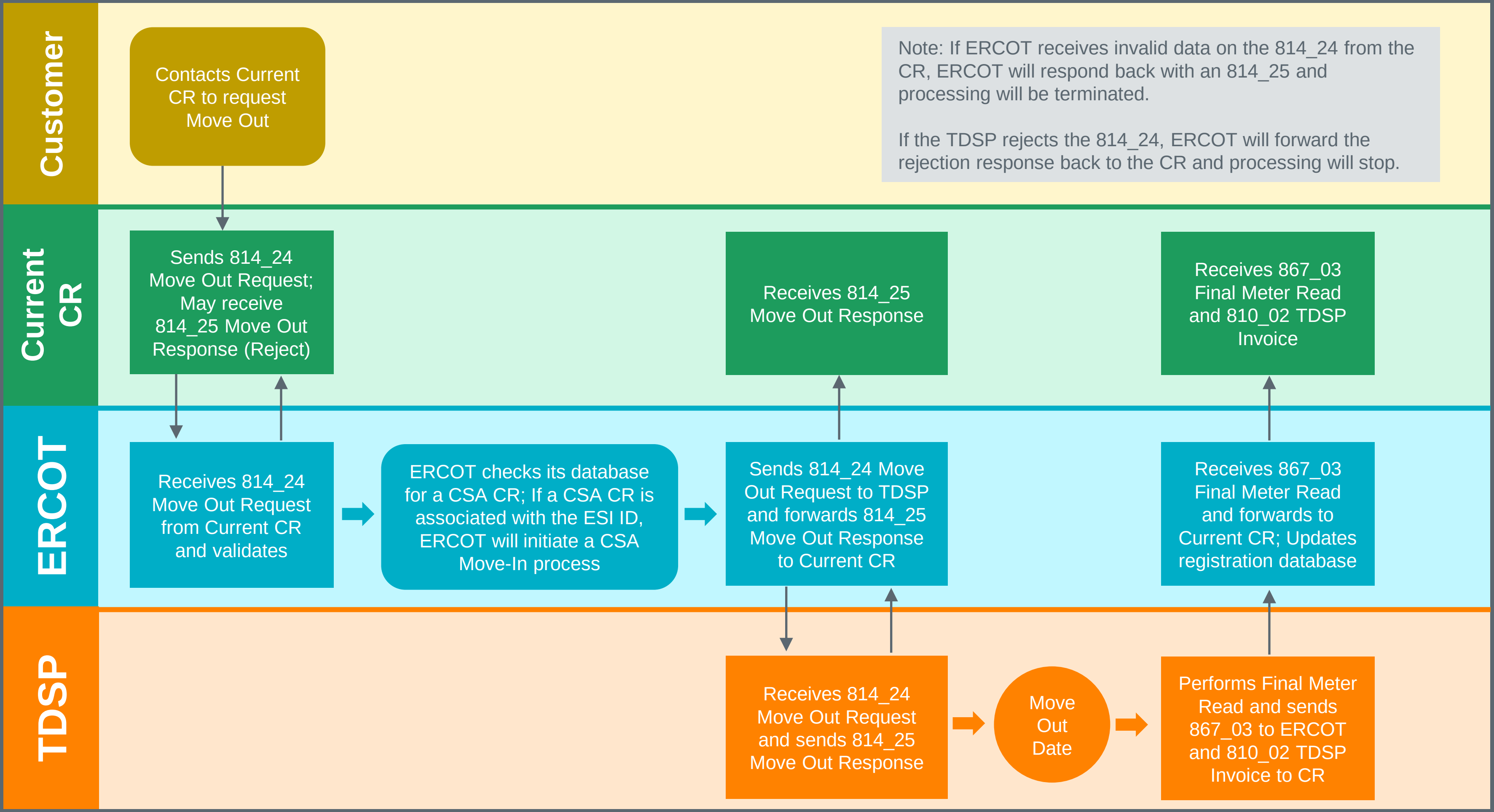
Texas SET Working Group

Market Coordination Team for Texas SET Version Release 4.0

Swimlane - Example

Move Out

Scenario: Customer Initiated Move Out No CSA Associate with ESI ID
Transactions: 814_24, 814_25, 867_03, 810_02

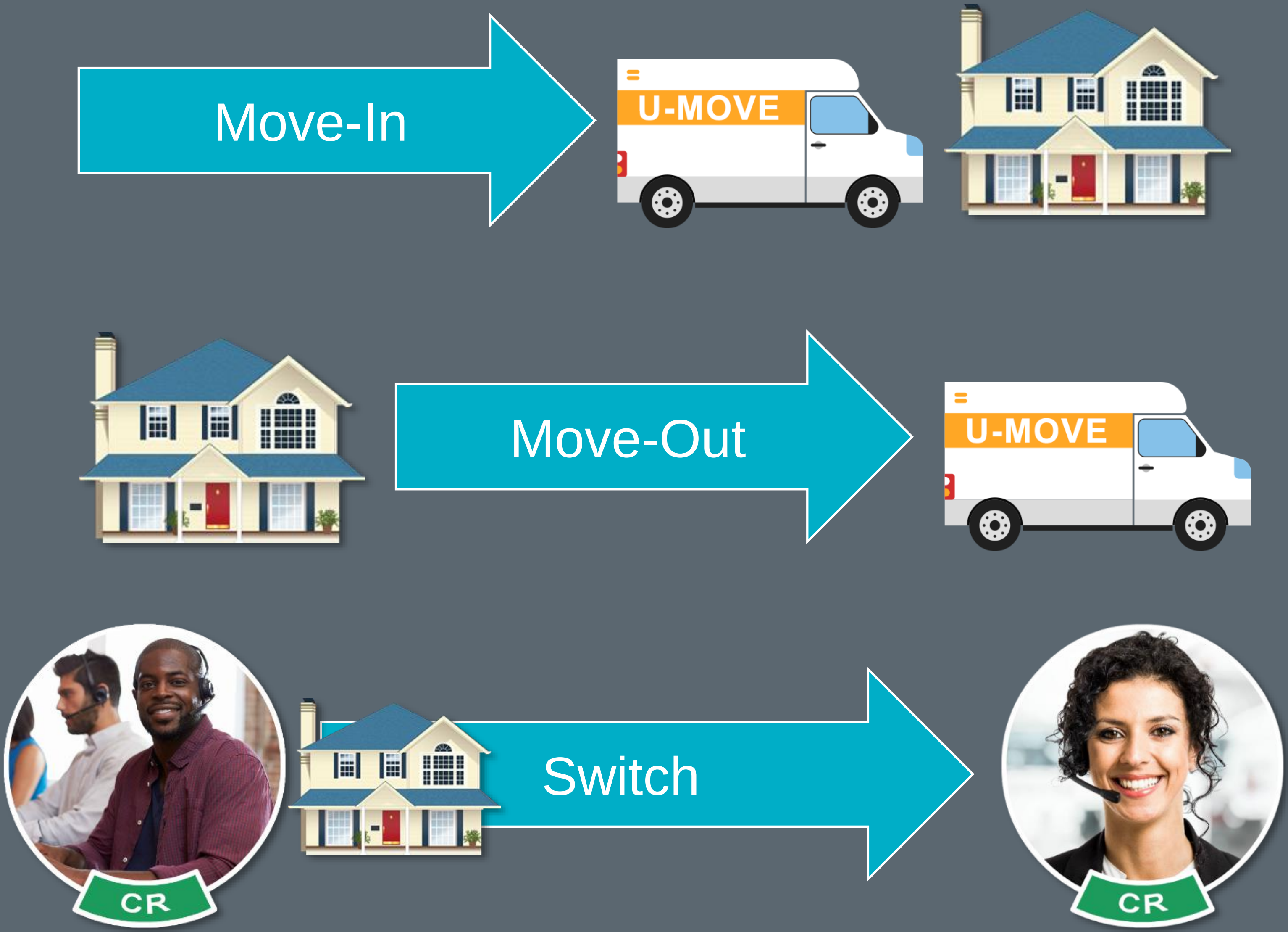


Customer
Current CR
ERCOT
TDSP
Contacts Current CR to request Move Out
Sends 814_24 Move Out Request; May receive 814_25 Move Out Response (Reject)
Receives 814_25 Move Out Response
Receives 867_03 Final Meter Read and 810_02 TDSP Invoice
Receives 814_24 Move Out Request from Current CR and validates
ERCOT checks its database for a CSA CR; If a CSA CR is associated with the ESI ID, ERCOT will initiate a CSA Move-In process
Sends 814_24 Move Out Request to TDSP and forwards 814_25 Move Out Response to Current CR
Receives 867_03 Final Meter Read and forwards to Current CR; Updates registration database
Receives 814_24 Move Out Request and sends 814_25 Move Out Response
Move Out Date
Performs Final Meter Read and sends 867_03 to ERCOT and 810_02 TDSP Invoice to CR

Note: If ERCOT receives invalid data on the 814_24 from the CR, ERCOT will respond back with an 814_25 and processing will be terminated.

If the TDSP rejects the 814_24, ERCOT will forward the rejection response back to the CR and processing will stop.

Three Main Processes


U-MOVE
U-MOVE
CR
CR

Move-In

Move-Out

Switch

Customer Decides to Select a New CR

- ? Who does the customer call
- ? What does the CR do
- ? Who has to know … Who does this
- ? What does the TDSP do
- ? Does anything else need to be done

Scenario –Retail Process

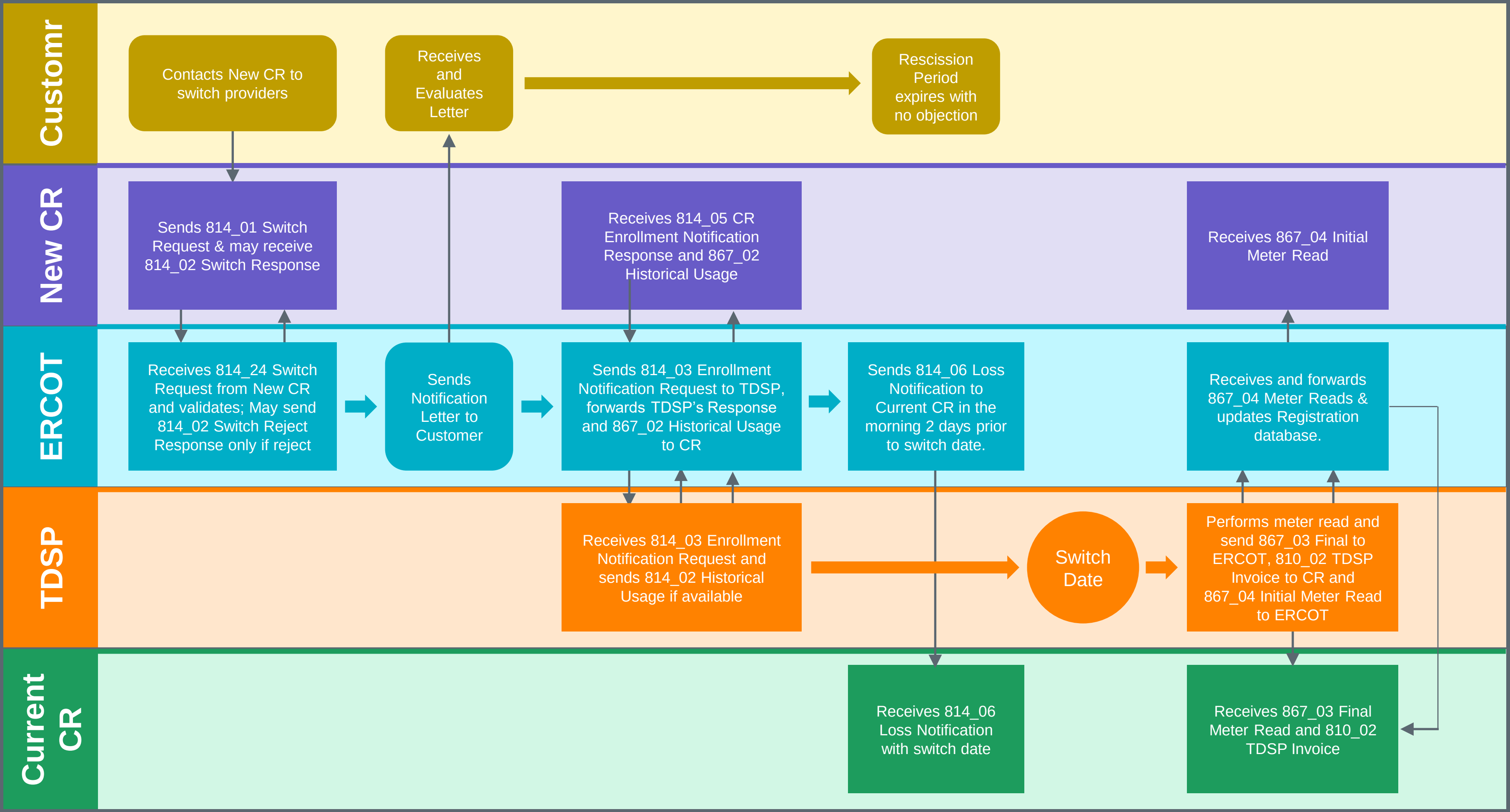
		From				To			
Transaction Type		ERCOT	Old CR	TDSP	New CR	ERCOT	Old CR	TDSP	New CR
Switch Request									
Enrollment Notification Request									
Enrollment Notification Response									
CR Enrollment Notification Response									
Loss Notification									
Final Usage									
Initial Meter Read									

Process Diagram

Switch

Scenario: Customer Switch, No Customer Objection

Transactions: 814_01, 814_02 (Reject Only), 814_03, 814_04, 814_05, 814_06, 867_02, 867_03, 810_02, 867_04



Customr

Contacts New CR to switch providers

Receives and Evaluates Letter

Rescission Period expires with no objection

New CR

Sends 814_01 Switch Request & may receive 814_02 Switch Response

Receives 814_05 CR Enrollment Notification Response and 867_02 Historical Usage

Receives 867_04 Initial Meter Read

ERCOT

Receives 814_24 Switch Request from New CR and validates; May send 814_02 Switch Reject Response only if reject

Sends Notification Letter to Customer

Sends 814_03 Enrollment Notification Request to TDSP, forwards TDSP's Response and 867_02 Historical Usage to CR

Sends 814_06 Loss Notification to Current CR in the morning 2 days prior to switch date.

Receives and forwards 867_04 Meter Reads & updates Registration database.

TDSP

Receives 814_03 Enrollment Notification Request and sends 814_02 Historical Usage if available

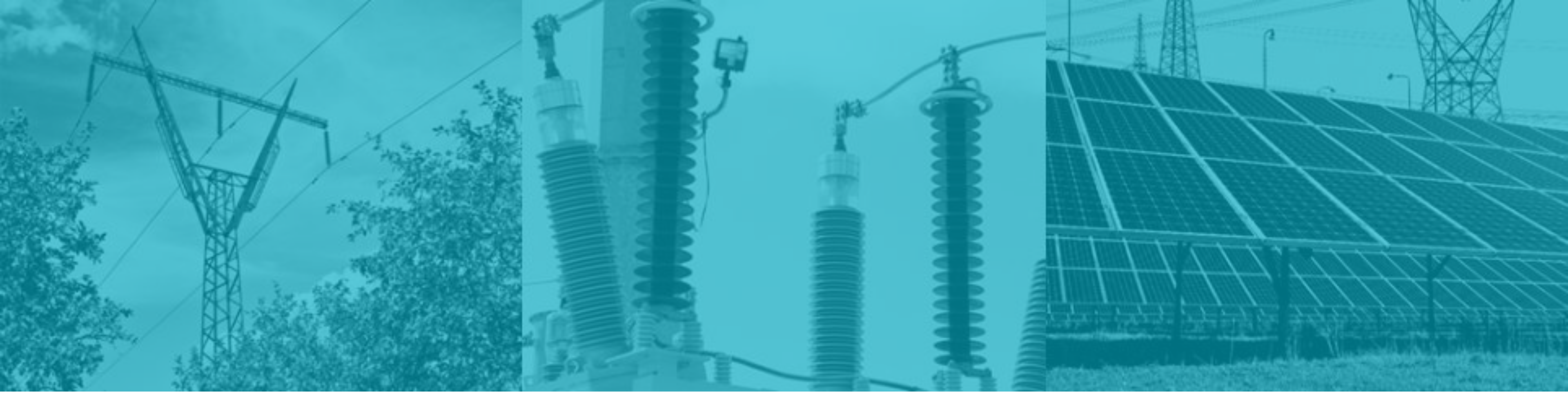
Switch Date

Performs meter read and send 867_03 Final to ERCOT, 810_02 TDSP Invoice to CR and 867_04 Initial Meter Read to ERCOT

Current CR

Receives 814_06 Loss Notification with switch date

Receives 867_03 Final Meter Read and 810_02 TDSP Invoice



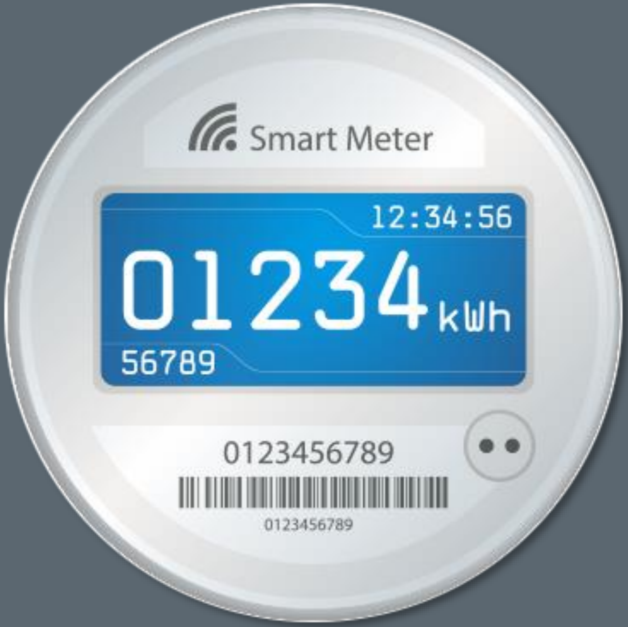
Module 4

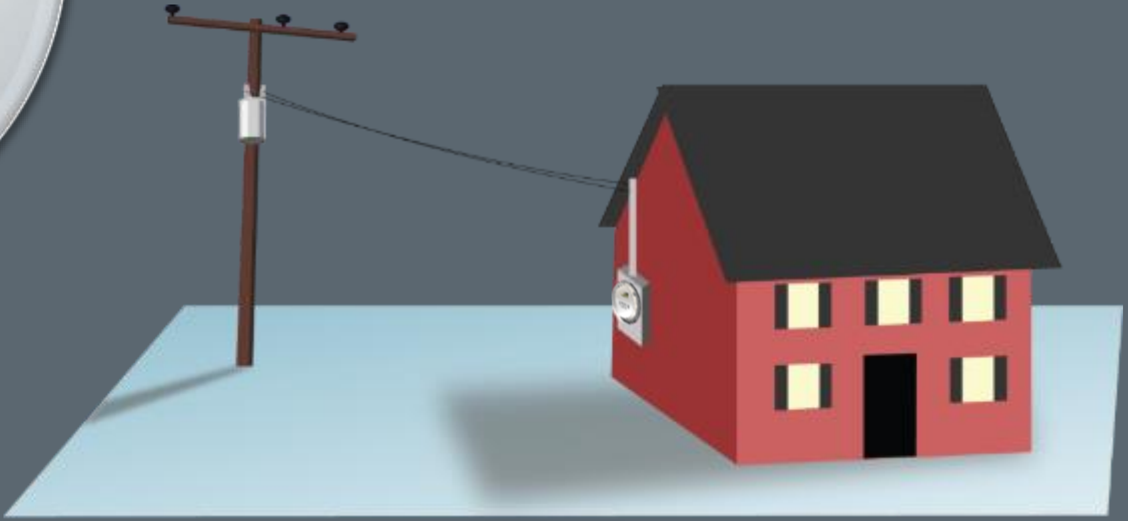
Metering

An Important Definition

Meter:

A device that measures electrical usage over a period of time.


Smart Meter
12:34:56
01234 kWh
56789
0123456789
0123456789



What are we measuring?

WATTS = (Current) x (Voltage)

Ex: 100 W Light bulb

Energy = Watt-Hours

Ex: (10) x (100 W Light bulbs for 1 Hour)

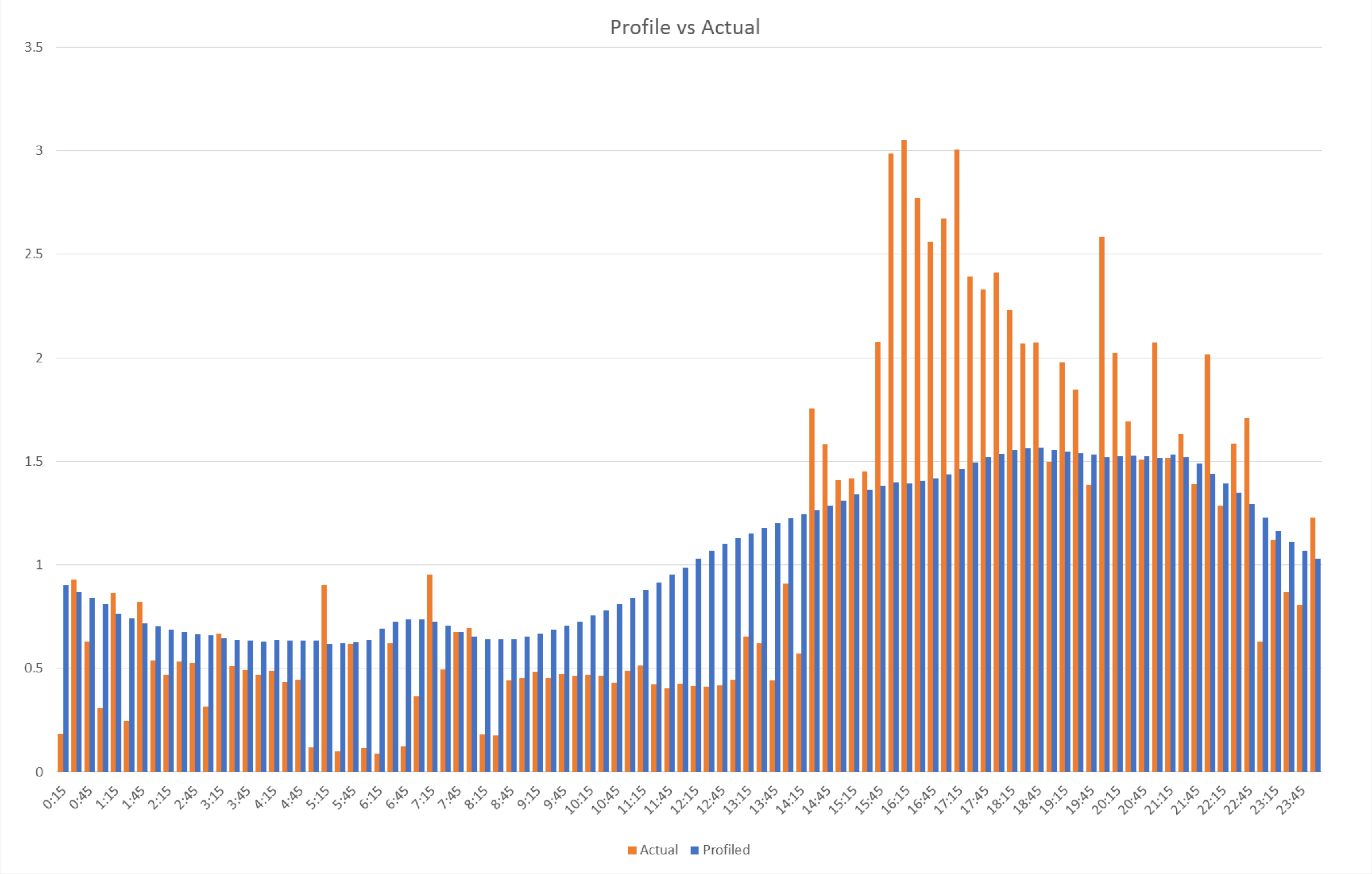
= 1000 WHr (or 1 kWH)

Non-IDR/Scalar/Analog Meter Characteristics

- “Traditional” Meter
- Scalar measurement for an entire month
- Data must be shaped for Wholesale Settlement
- Manual field activities

ABB
KILOWATTHOURS
Rr
13⅓
SINGLE-STATOR WATTHOUR METER
2A

Scalar to Interval Data



Interval Data

Non-Interval Data VS Interval Data

Non-Interval Data

- Usage is recorded in ~30 day intervals
- Data must be shaped for 15 minute Wholesale Settlement

Interval Data

- Usage is recorded in 15 minute intervals (96 intervals per 24 hrs)
- Data is already shaped for 15 minute Wholesale Settlement

Advanced Meter System (AMS) Meters

Characteristics

- Wholesale Settlement ready
- Remotely read

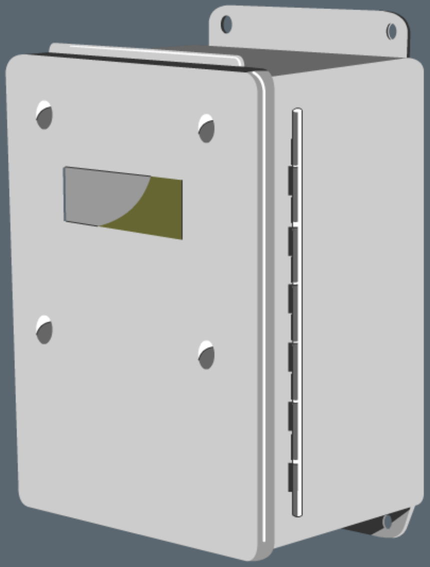
AMSR (≤ 200 amp)

Remote connect / disconnect

AMSM

Manual connect / disconnect

Interval Data Recorder (IDR) Meter Characteristics



- Wholesale Settlement ready
- Typically reported monthly
- Predominantly on large customers > 700 kW/kVA demand
- May require manual field activities

AMS benefits to the market

- 99.5% competitive load using interval data
- REP and Customer can see actual usage
- More accurate CR Settlement with QSE

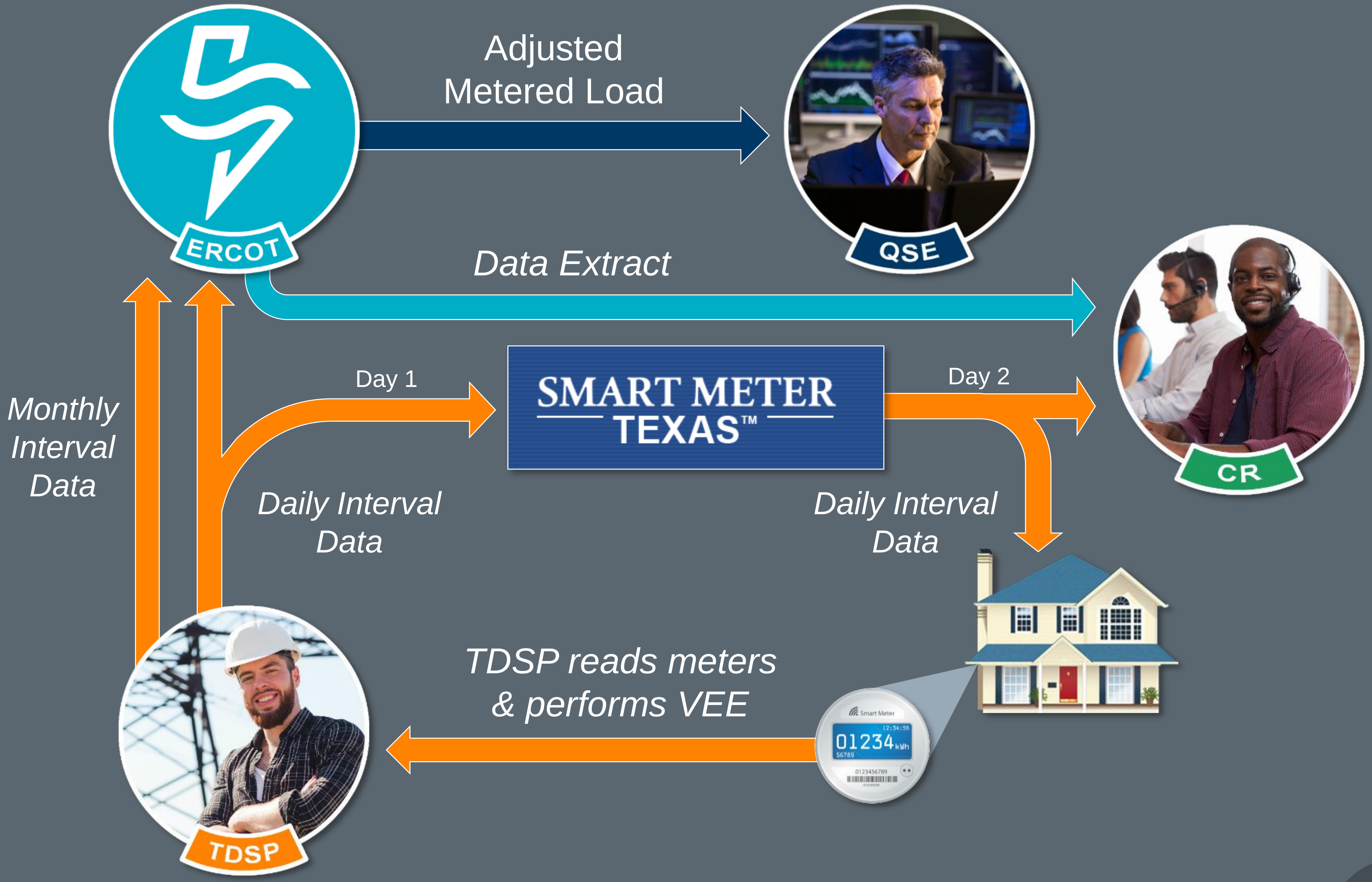
AMS benefits to the market

- 73% actual data used on Initial Settlement
- Faster execution of retail market processes

AMS Transaction Processing Benefits

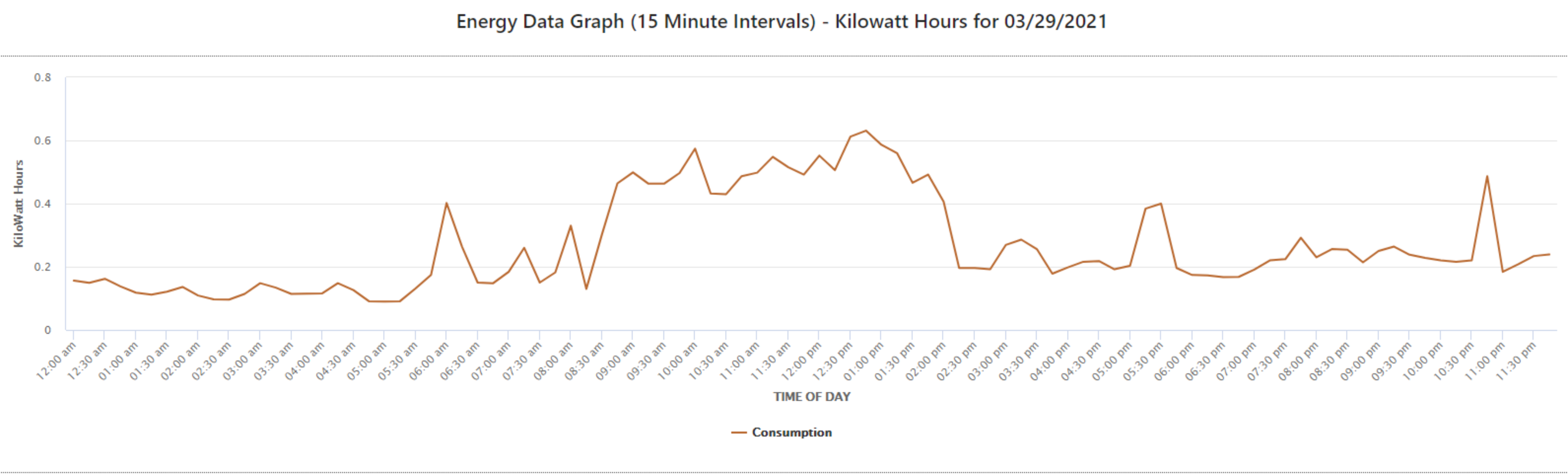
Enrollment type Initiating Transaction	**AMS Remote (AMSR)**	**AMS Manual (AMSM)**	**Non-AMS**
Move-In 814_16	Same Day	2 Business Days	2 Business Days
Standard Switch 814_01	Same Day	Same Day	Within Next 4 Business Days
Self Selected Switch 814_01	Same Day	Same Day	At Least 2 Business Days
Move-Out 814_24	Same Day	2 Business Days	2 Business Days

AMS Data Flow

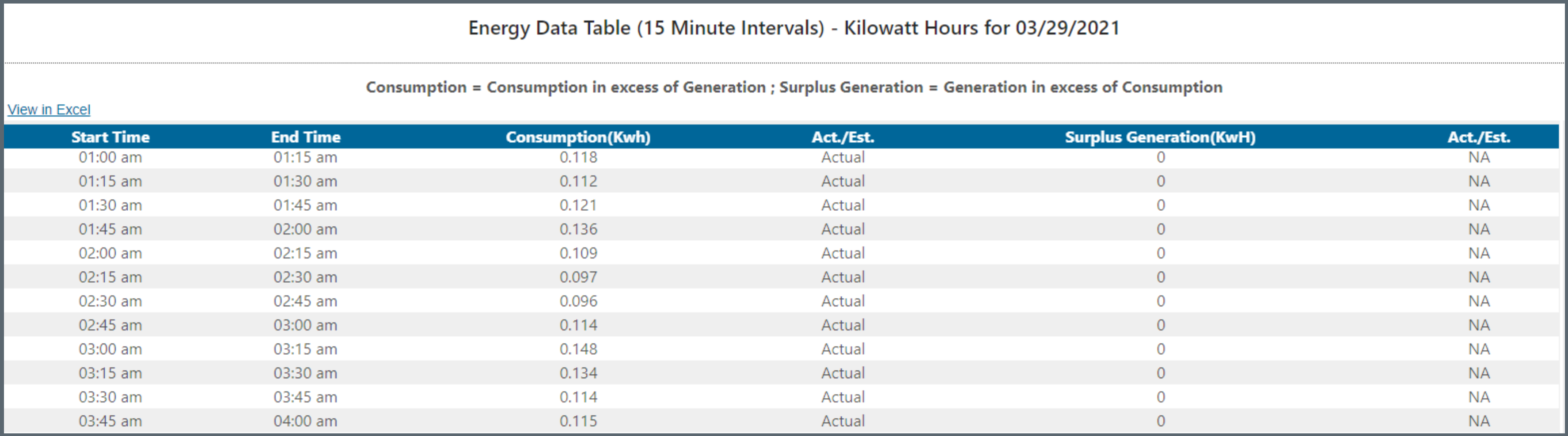


ERCOT
Adjusted
Metered Load
QSE
Data Extract
CR
Day 1
SMART METER
TEXAS™
Day 2
Monthly
Interval
Data
Daily Interval
Data
Daily Interval
Data
TDSP reads meters
& performs VEE
TDSP
Smart Meter
12:34:56
01234 kWh
56789
0123456789

Smart Meter Texas



Energy Data Graph (15 Minute Intervals) - Kilowatt Hours for 03/29/2021



Energy Data Table (15 Minute Intervals) - Kilowatt Hours for 03/29/2021

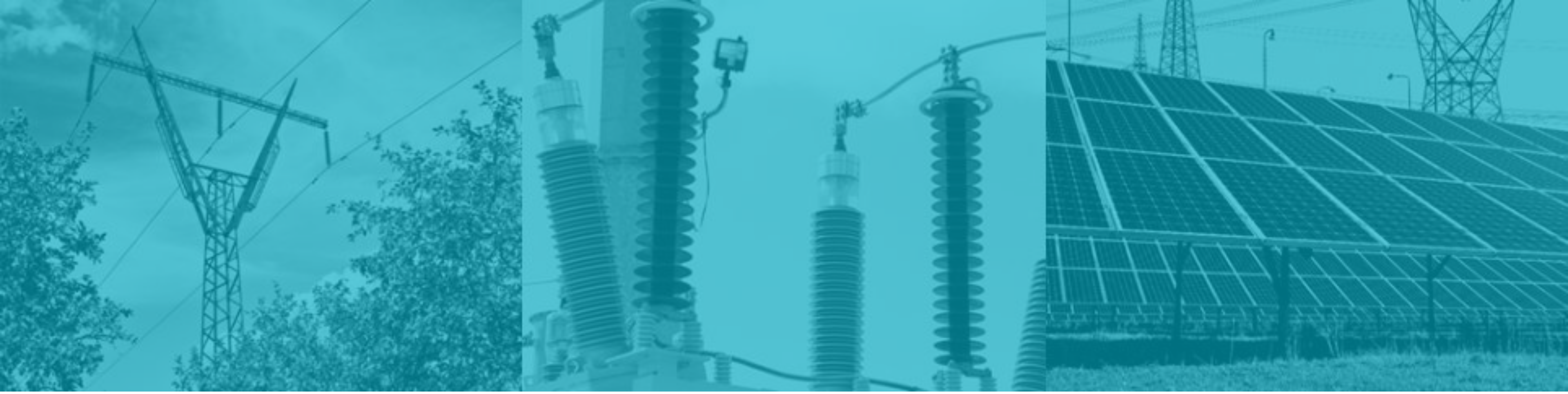
Consumption = Consumption in excess of Generation ; Surplus Generation = Generation in excess of Consumption

View in Excel

Start Time	End Time	Consumption(Kwh)	Act./Est.	Surplus Generation(KwH)	Act./Est.
01:00 am	01:15 am	0.118	Actual	0	NA
01:15 am	01:30 am	0.112	Actual	0	NA
01:30 am	01:45 am	0.121	Actual	0	NA
01:45 am	02:00 am	0.136	Actual	0	NA
02:00 am	02:15 am	0.109	Actual	0	NA
02:15 am	02:30 am	0.097	Actual	0	NA
02:30 am	02:45 am	0.096	Actual	0	NA
02:45 am	03:00 am	0.114	Actual	0	NA
03:00 am	03:15 am	0.148	Actual	0	NA
03:15 am	03:30 am	0.134	Actual	0	NA
03:30 am	03:45 am	0.114	Actual	0	NA
03:45 am	04:00 am	0.115	Actual	0	NA

Other AMS Benefits

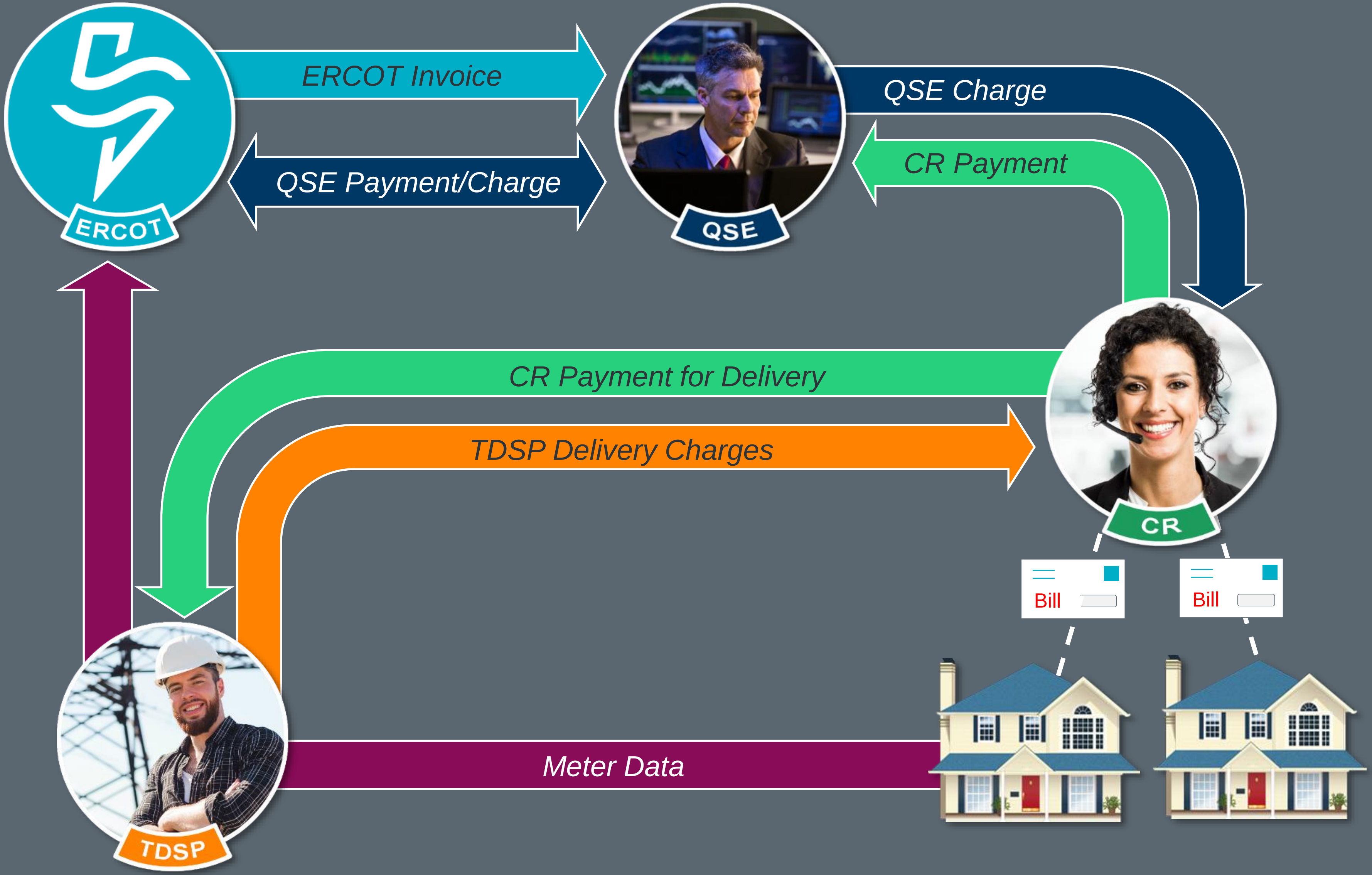
- Allows for pre-pay programs
- Allows for demand response
- Allows for Time-of-Use rate offerings
- Improved service reliability
- Early detection of faulty meters or tampering



Module 5

Settlement of Retail Load

Settlement Processes


ERCOT Invoice
QSE Payment/Charge
QSE Charge
CR Payment
CR Payment for Delivery
TDSP Delivery Charges
Meter Data
ERCOT
QSE
CR
TDSP
Bill
Bill

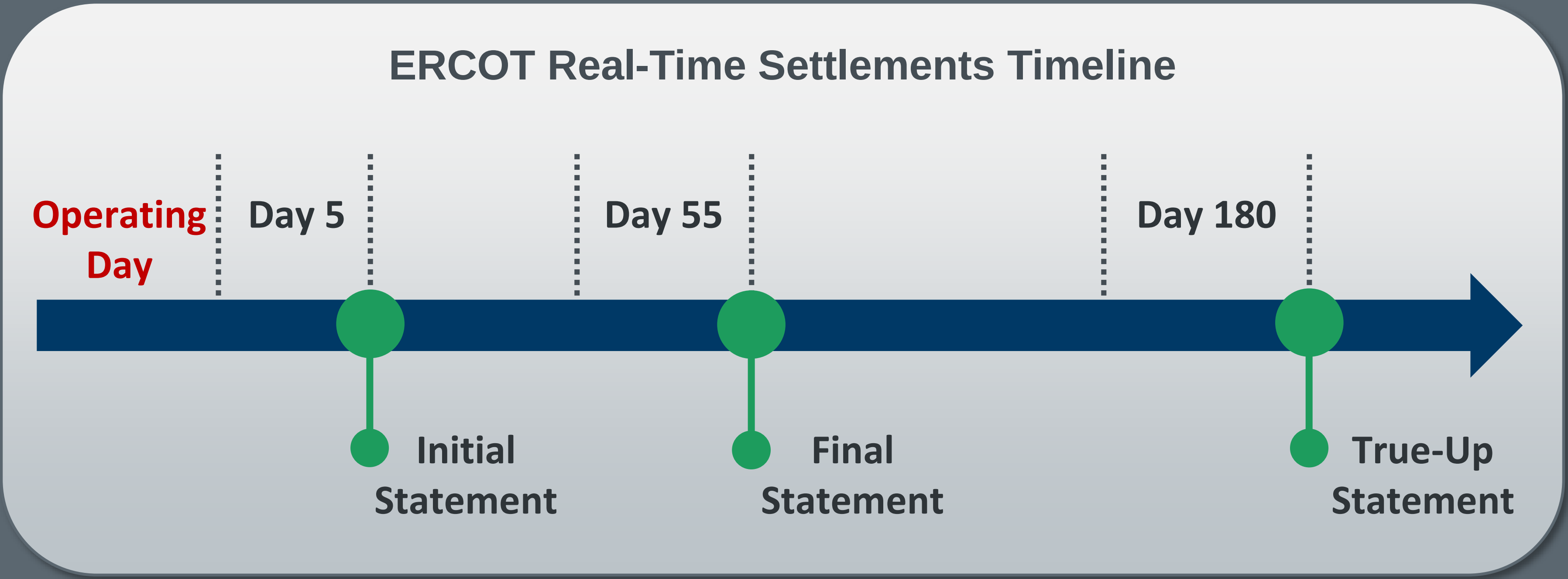
ERCOT Settles with QSE based on Adjusted Metered Load

Adjusted Meter Load

- Unaccounted for Energy
- Transmission Loss Factors
- Distribution Loss Factors
- Aggregation by QSE and LSE

Settlement Timeline

- Each Operating day is settled a minimum of three times
- Most settlement is transacted on the Initial Settlement

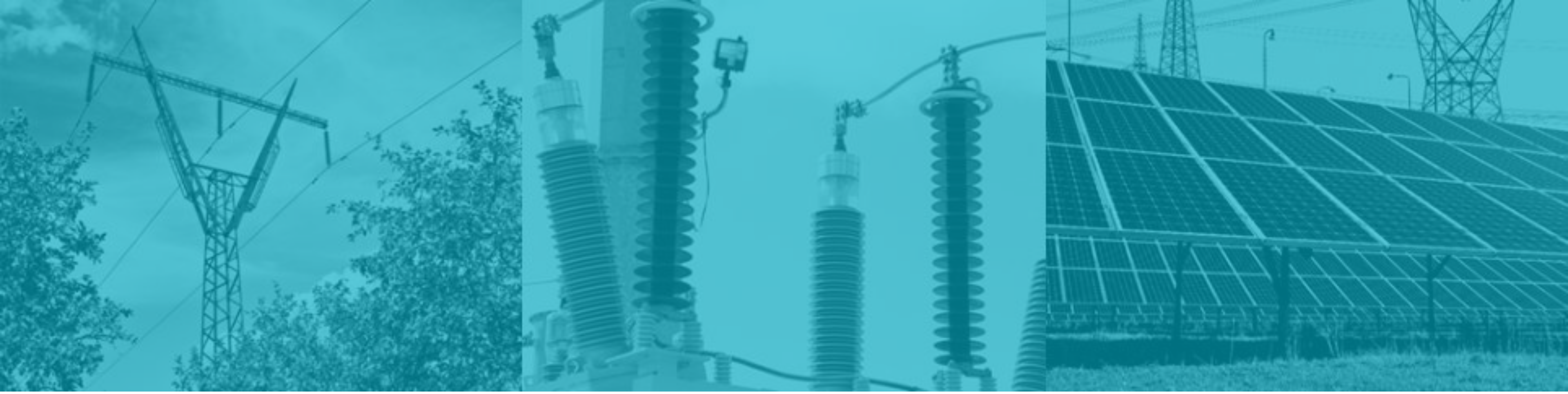


ERCOT Real-Time Settlements Timeline

Operating Day
Day 5
Day 55
Day 180
Initial Statement
Final Statement
True-Up Statement

Discussion

Important Questions



Module 6

Data Transparency & Availability

Market Information System Data Access

Also available on ercot.com

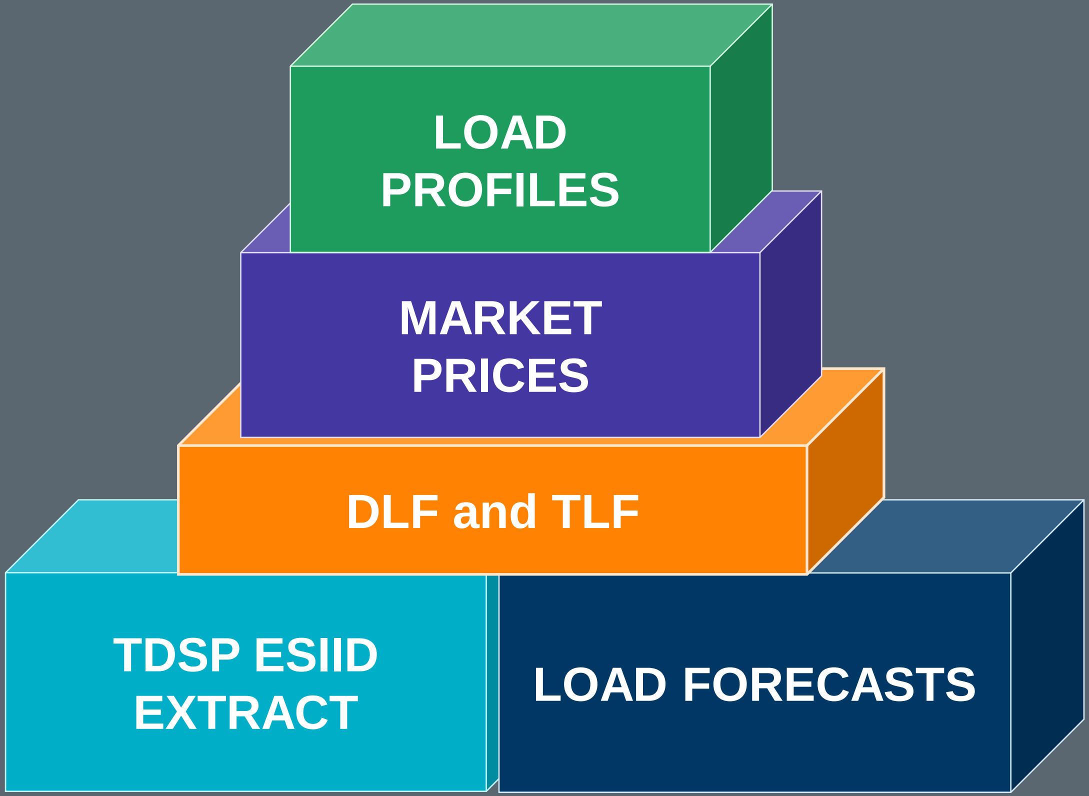
Available to all Market Participants

MIS
CERTIFIED

Only available to a specific Market Participant

Access managed by assigned roles

Market Information System Data Access



LOAD PROFILES

MARKET PRICES

DLF and TLF

TDSP ESIID EXTRACT

LOAD FORECASTS

Public Data is also available on ercot.com

Market Information System Data Access

TRANSMISSION OUTAGES

DEMAND & ENERGY MONTHLY REPORTS

TDSP MONTHLY LOAD REPORTS

Market Information System Data Access

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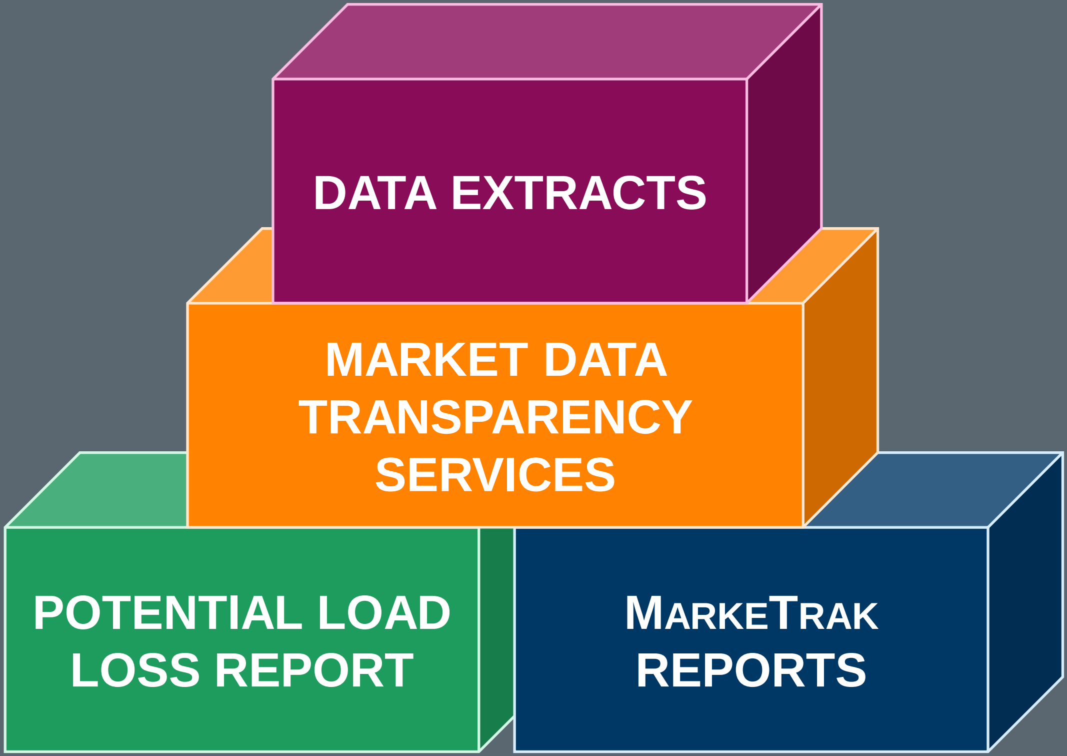
CERTIFIED



DATA EXTRACTS

MARKET DATA TRANSPARENCY SERVICES

POTENTIAL LOAD LOSS REPORT

MarkeTrak REPORTS

ESIID Service History and Usage Extract

- ESI ID Relationships and Characteristics
- Provides data needed to perform shadow settlements of Retail load.
    - Supplemental IDR Required Interval Data Extract
    - Supplemental AMS Interval Data Extract

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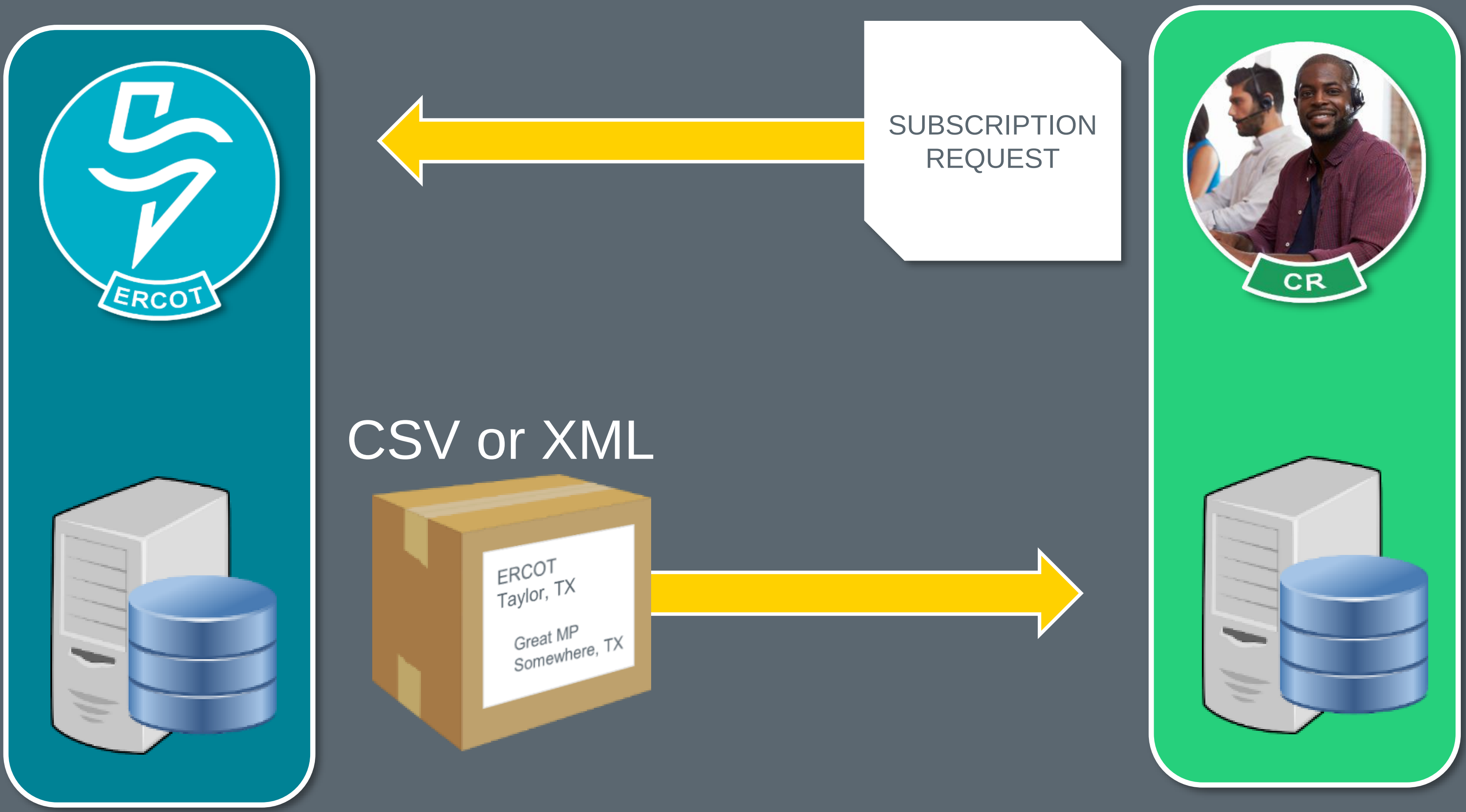
Market Information System
Data Products
Applications
Notices
Search Data Products
Mimic
View as MP
Subscribe
Subscribe
Subscribe

See ERCOT courses on MIS and Intro to Extracts

Data Extracts

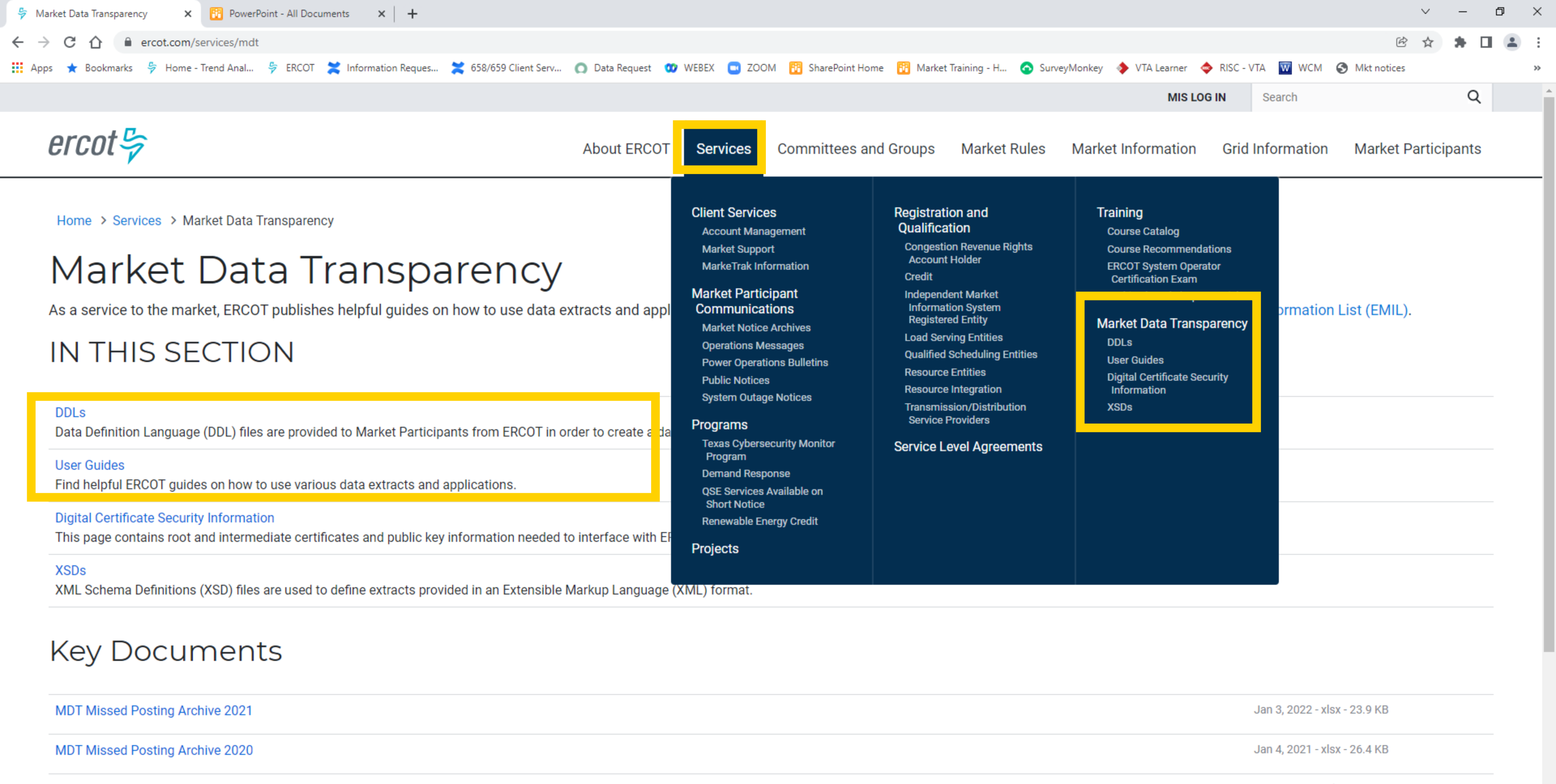

ERCOT
CR
ERCOT
Taylor, TX
Great MP
Somewhere, TX

SUBSCRIPTION REQUEST

CSV or XML

Scenario: Utilizing Data Extracts

1. Construct a Database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Market Rules
Market Information
Grid Information
Market Participants
Client Services
Account Management
Market Support
MarkeTrak Information
Market Participant Communications
Market Notice Archives
Operations Messages
Power Operations Bulletins
Public Notices
System Outage Notices
Programs
Texas Cybersecurity Monitor Program
Demand Response
QSE Services Available on Short Notice
Renewable Energy Credit
Projects
Registration and Qualification
Congestion Revenue Rights Account Holder
Credit
Independent Market Information System Registered Entity
Load Serving Entities
Qualified Scheduling Entities
Resource Entities
Resource Integration
Transmission/Distribution Service Providers
Service Level Agreements
Training
Course Catalog
Course Recommendations
ERCOT System Operator Certification Exam
Market Data Transparency
DDLs
User Guides
Digital Certificate Security Information
XSDs
Home > Services > Market Data Transparency

Market Data Transparency

As a service to the market, ERCOT publishes helpful guides on how to use data extracts and appl ormation List (EMIL).

IN THIS SECTION

DDLs
Data Definition Language (DDL) files are provided to Market Participants from ERCOT in order to create a da

User Guides
Find helpful ERCOT guides on how to use various data extracts and applications.

Digital Certificate Security Information
This page contains root and intermediate certificates and public key information needed to interface with E

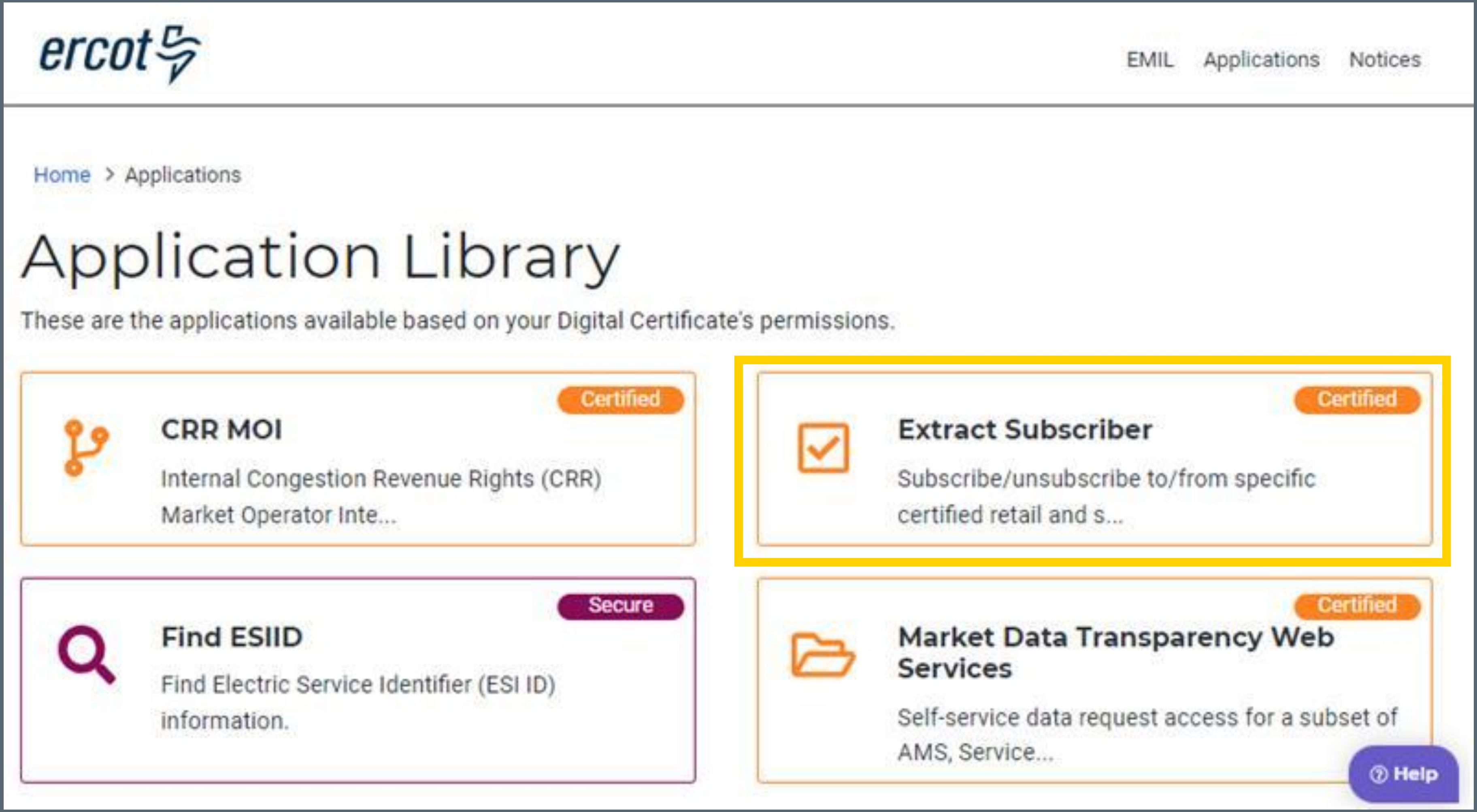
XSDs
XML Schema Definitions (XSD) files are used to define extracts provided in an Extensible Markup Language (XML) format.

Key Documents

MDT Missed Posting Archive 2021	Jan 3, 2022 - xlsx - 23.9 KB
MDT Missed Posting Archive 2020	Jan 4, 2021 - xlsx - 26.4 KB

Scenario: Utilizing Data Extracts

2. Subscribe



ercot
EMIL
Applications
Notices
Home > Applications

Application Library

These are the applications available based on your Digital Certificate's permissions.

Certified

CRR MOI

Internal Congestion Revenue Rights (CRR) Market Operator Inte...

Certified

Extract Subscriber

Subscribe/unsubscribe to/from specific certified retail and s...

Secure

Find ESIID

Find Electric Service Identifier (ESI ID) information.

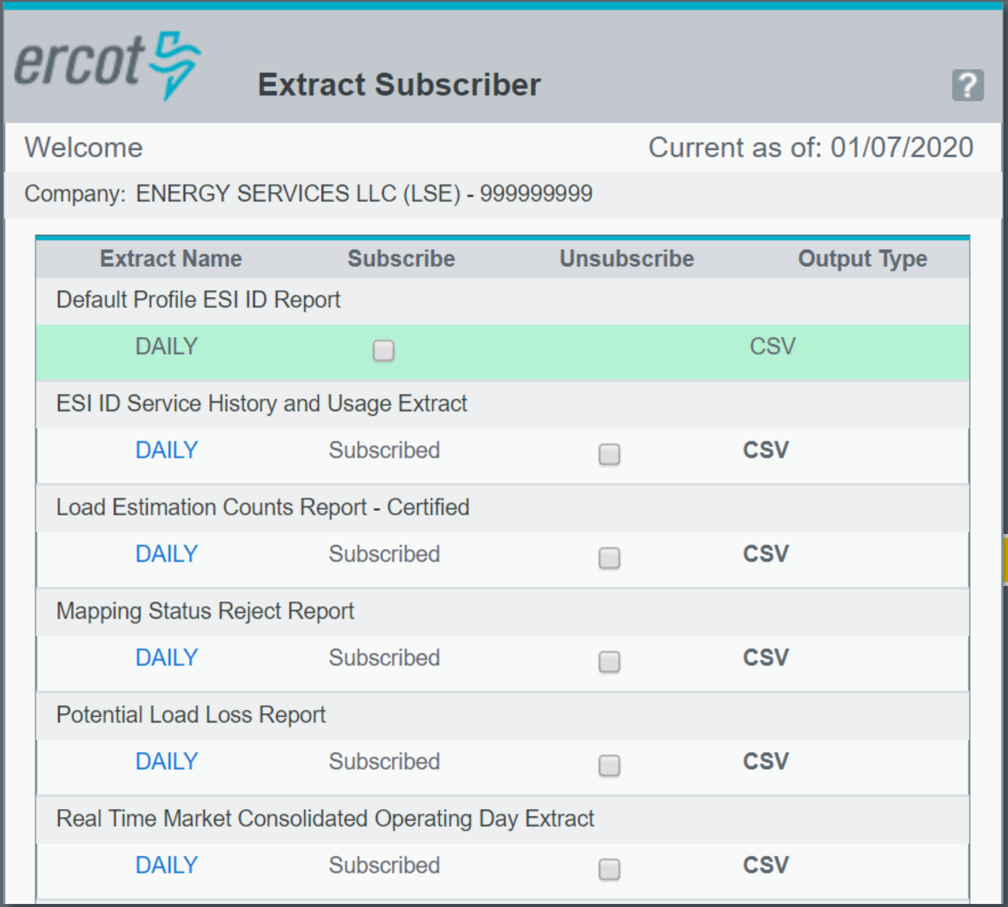
Certified

Market Data Transparency Web Services

Self-service data request access for a subset of AMS, Service...

Scenario: Utilizing Data Extracts

3. Download and import data



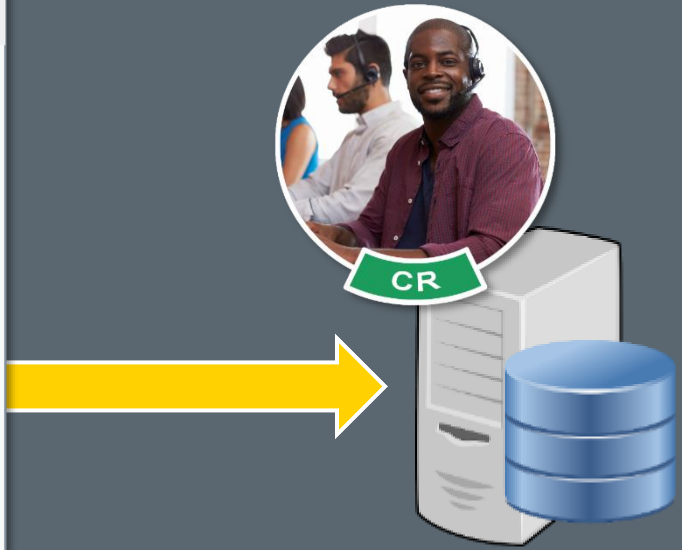
Extract Subscriber

Welcome

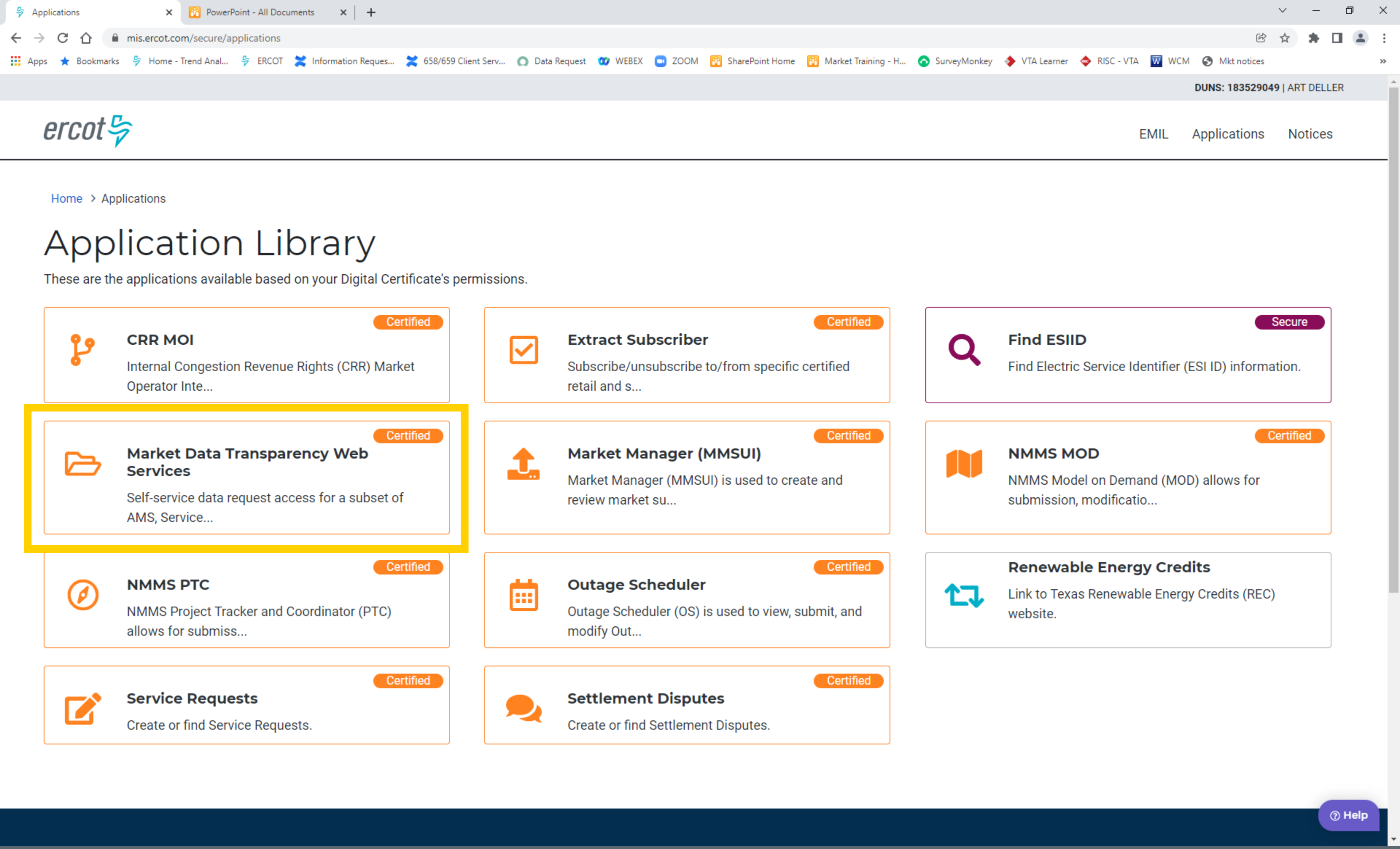
Current as of: 01/07/2020

Company: ENERGY SERVICES LLC (LSE) - 999999999

Extract Name	Subscribe	Unsubscribe	Output Type
Default Profile ESI ID Report			
DAILY	☐		CSV
ESI ID Service History and Usage Extract			
DAILY	Subscribed	☐	CSV
Load Estimation Counts Report - Certified			
DAILY	Subscribed	☐	CSV
Mapping Status Reject Report			
DAILY	Subscribed	☐	CSV
Potential Load Loss Report			
DAILY	Subscribed	☐	CSV
Real Time Market Consolidated Operating Day Extract			
DAILY	Subscribed	☐	CSV



Market Data Transparency Application



Applications
PowerPoint - All Documents
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Find Electric Service Identifier (ESI ID) information.

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Link to Texas Renewable Energy Credits (REC) website.

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Create or find Service Requests.

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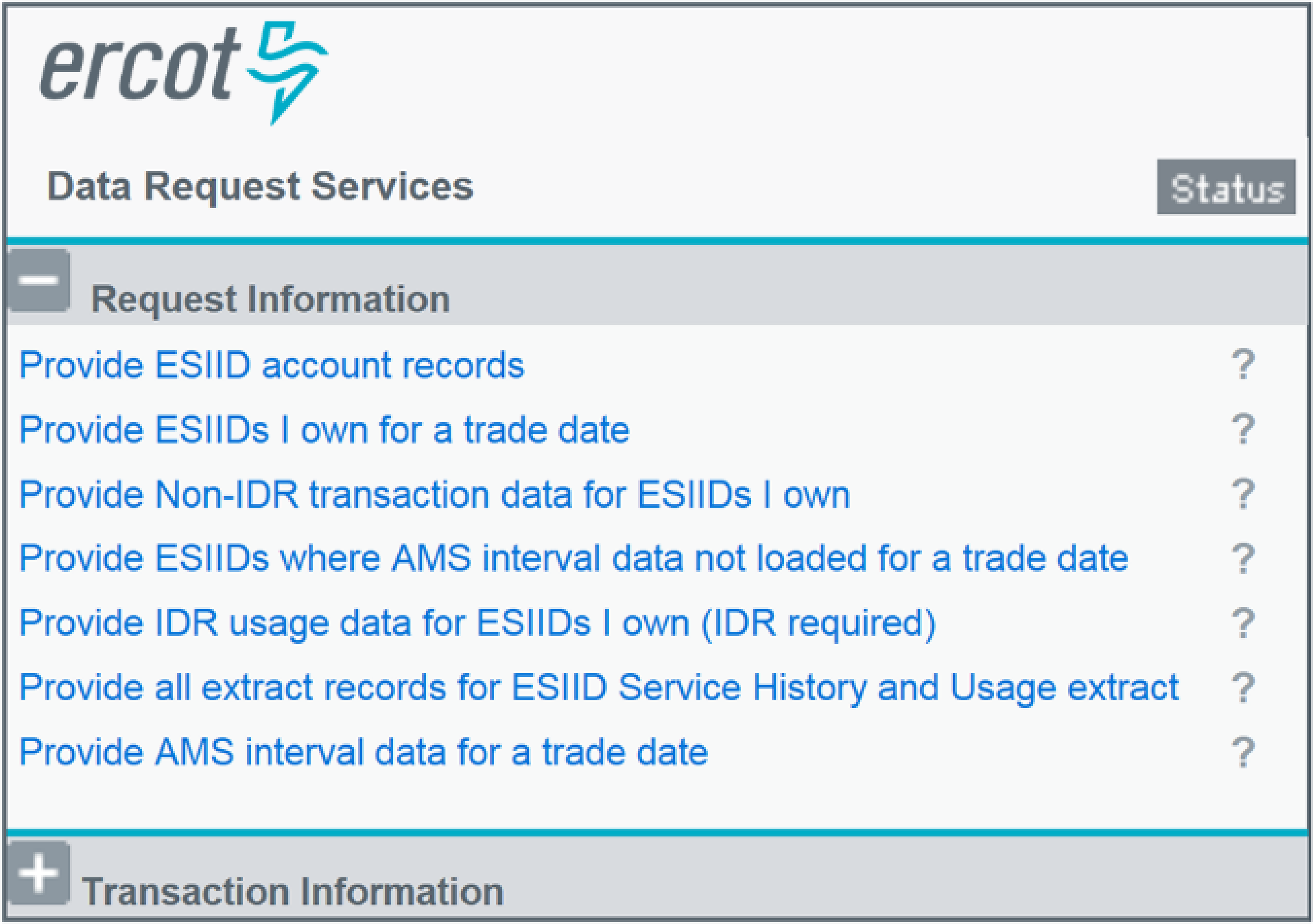
Create or find Settlement Disputes.

Provides Similar Information on Ad Hoc Basis



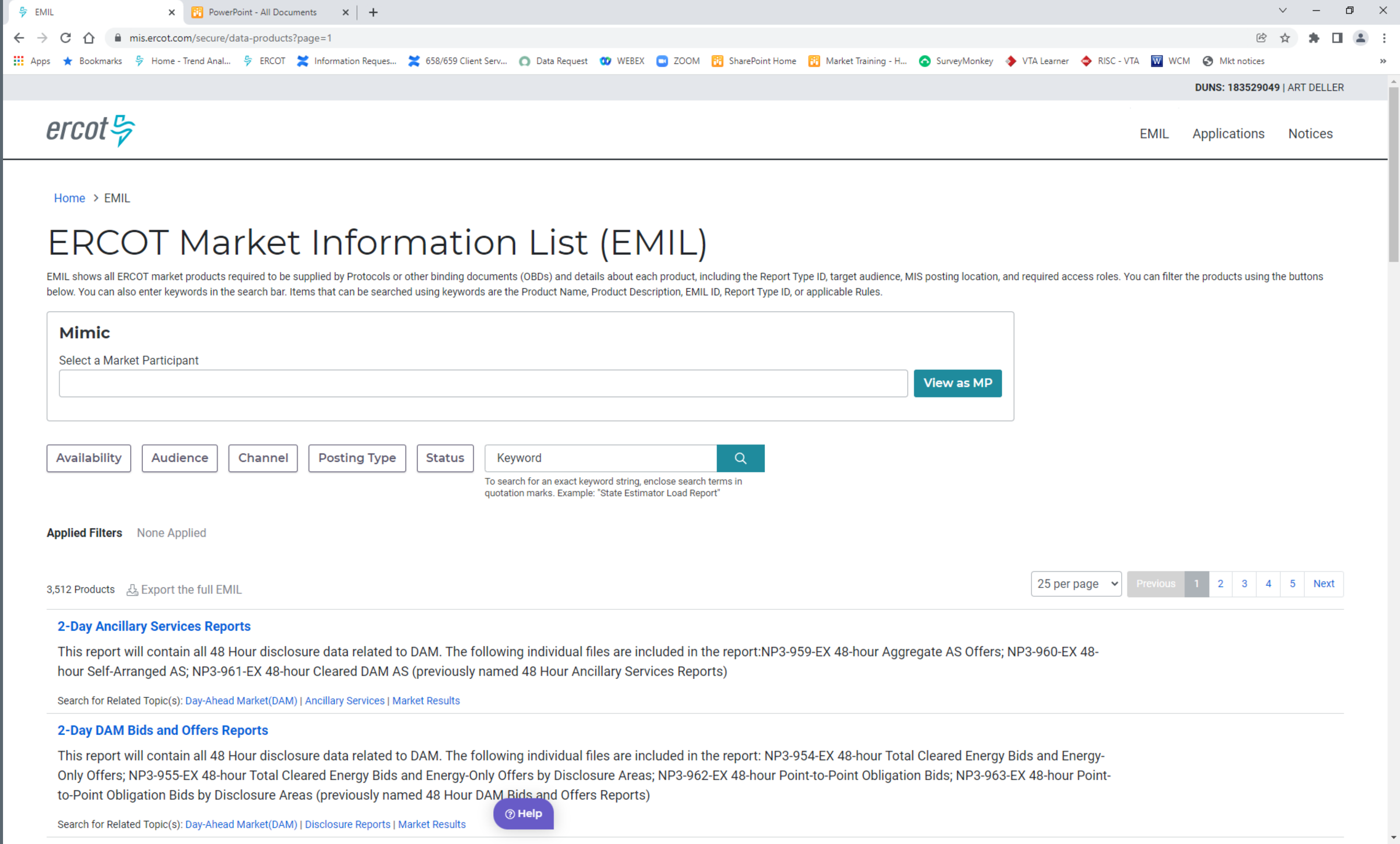
Data Request Services

Request Information

- Provide ESIID account records ?
- Provide ESIIDs I own for a trade date ?
- Provide Non-IDR transaction data for ESIIDs I own ?
- Provide ESIIDs where AMS interval data not loaded for a trade date ?
- Provide IDR usage data for ESIIDs I own (IDR required) ?
- Provide all extract records for ESIID Service History and Usage extract ?
- Provide AMS interval data for a trade date ?

Transaction Information

ERCOT Market Information List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25 per page
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2
3
4
5
Next
Help

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ERCOT Market Information List (EMIL)

EMIL shows all ERCOT market products required to be supplied by Protocols or other binding documents (OBDs) and details about each product, including the Report Type ID, target audience, MIS posting location, and required access roles. You can filter the products using the buttons below. You can also enter keywords in the search bar. Items that can be searched using keywords are the Product Name, Product Description, EMIL ID, Report Type ID, or applicable Rules.

Mimic

Select a Market Participant

To search for an exact keyword string, enclose search terms in quotation marks. Example: "State Estimator Load Report"

Applied Filters None Applied

3,512 Products Export the full EMIL

2-Day Ancillary Services Reports

This report will contain all 48 Hour disclosure data related to DAM. The following individual files are included in the report:NP3-959-EX 48-hour Aggregate AS Offers; NP3-960-EX 48-hour Self-Arranged AS; NP3-961-EX 48-hour Cleared DAM AS (previously named 48 Hour Ancillary Services Reports)

Search for Related Topic(s): Day-Ahead Market(DAM) | Ancillary Services | Market Results

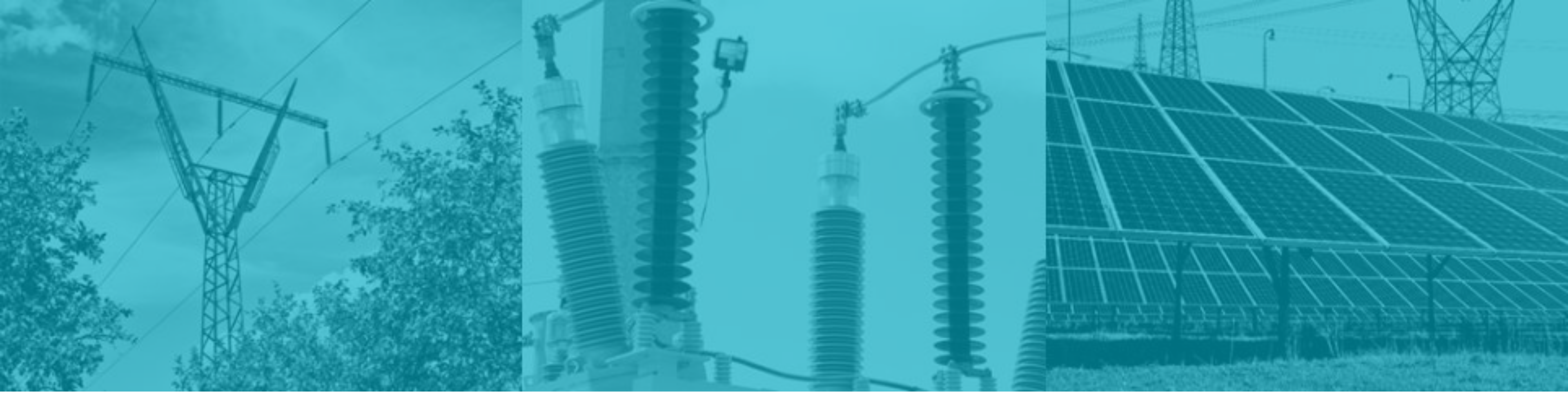
2-Day DAM Bids and Offers Reports

This report will contain all 48 Hour disclosure data related to DAM. The following individual files are included in the report: NP3-954-EX 48-hour Total Cleared Energy Bids and Energy-Only Offers; NP3-955-EX 48-hour Total Cleared Energy Bids and Energy-Only Offers by Disclosure Areas; NP3-962-EX 48-hour Point-to-Point Obligation Bids; NP3-963-EX 48-hour Point-to-Point Obligation Bids by Disclosure Areas (previously named 48 Hour DAM Bids and Offers Reports)

Search for Related Topic(s): Day-Ahead Market(DAM) | Disclosure Reports | Market Results

Discussion

What does a CR do with all this data?



Module 7

Issue Resolution

Retail responsibilities

- Investigate customer issues
- Maintain customer records
- Verify billing accuracy

Common Issues

Missing Transactions

Usage & Billing Issues

Inadvertent Gains & Losses

Switch Hold

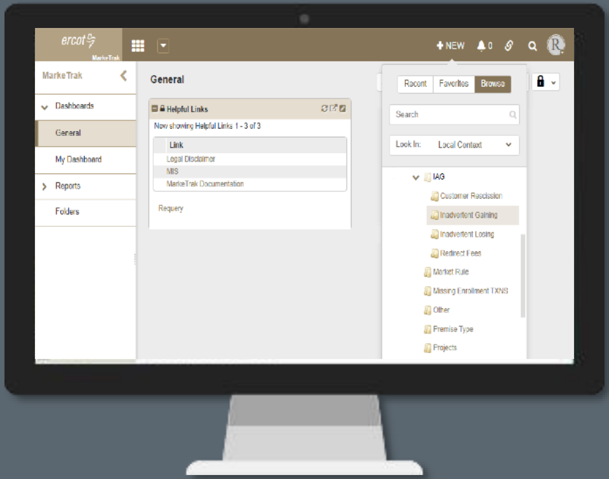
Discussion

What tools are available to identify & resolve issues?

Market Participants turn to …

MarkeTrak

The Market issue resolution tool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Dashboards
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My Dashboard
Reports
Folders
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MIS
MarkeTrak Documentation
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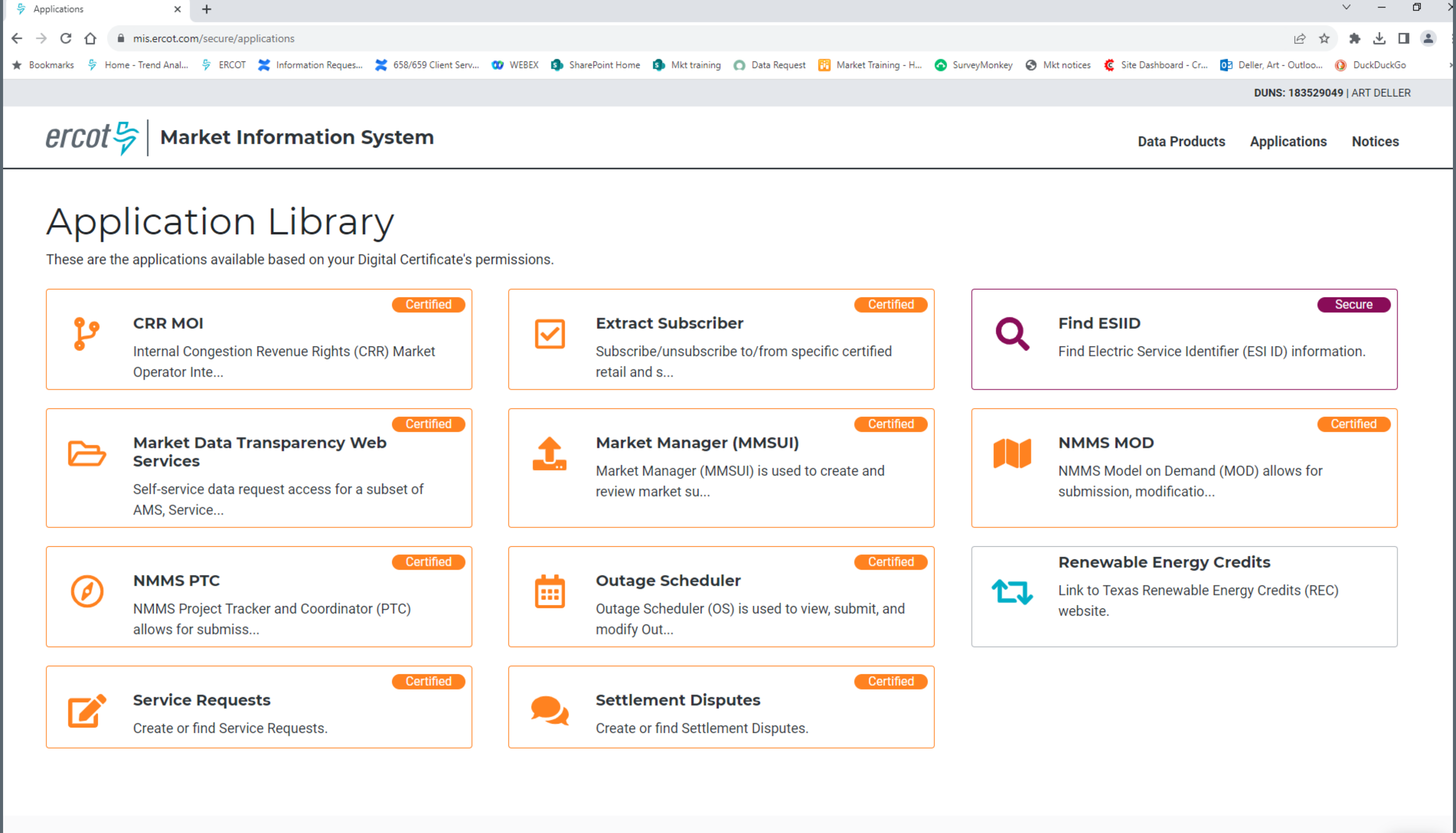
Recent
Favorites
Browse
Search
Look In:
Local Context
IAG
Customer Rescission
Inadvertent Gaining
Inadvertent Losing
Redirect Fees
Market Rule
Missing Enrollment TXNS
Other
Premise Type
Projects

Now showing Helpful Links 1 - 3 of 3

Issue Resolution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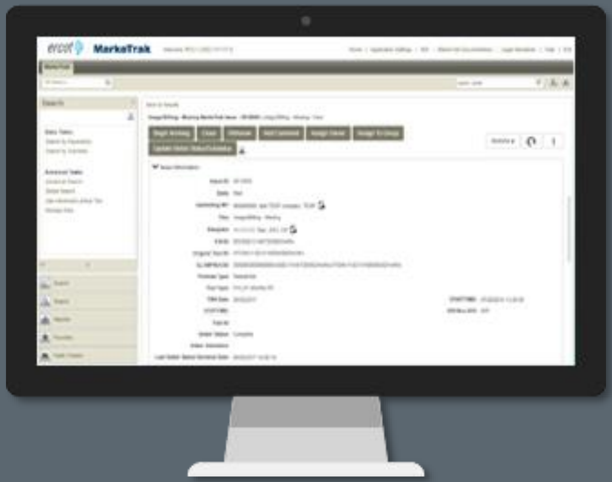
Create or find Settlement Disputes.

Goals of MarkeTrak

- Facilitate resolution of issues between Market Participants
  - Discovery and visibility
  - Tracking and status
- Enable historical reporting of issues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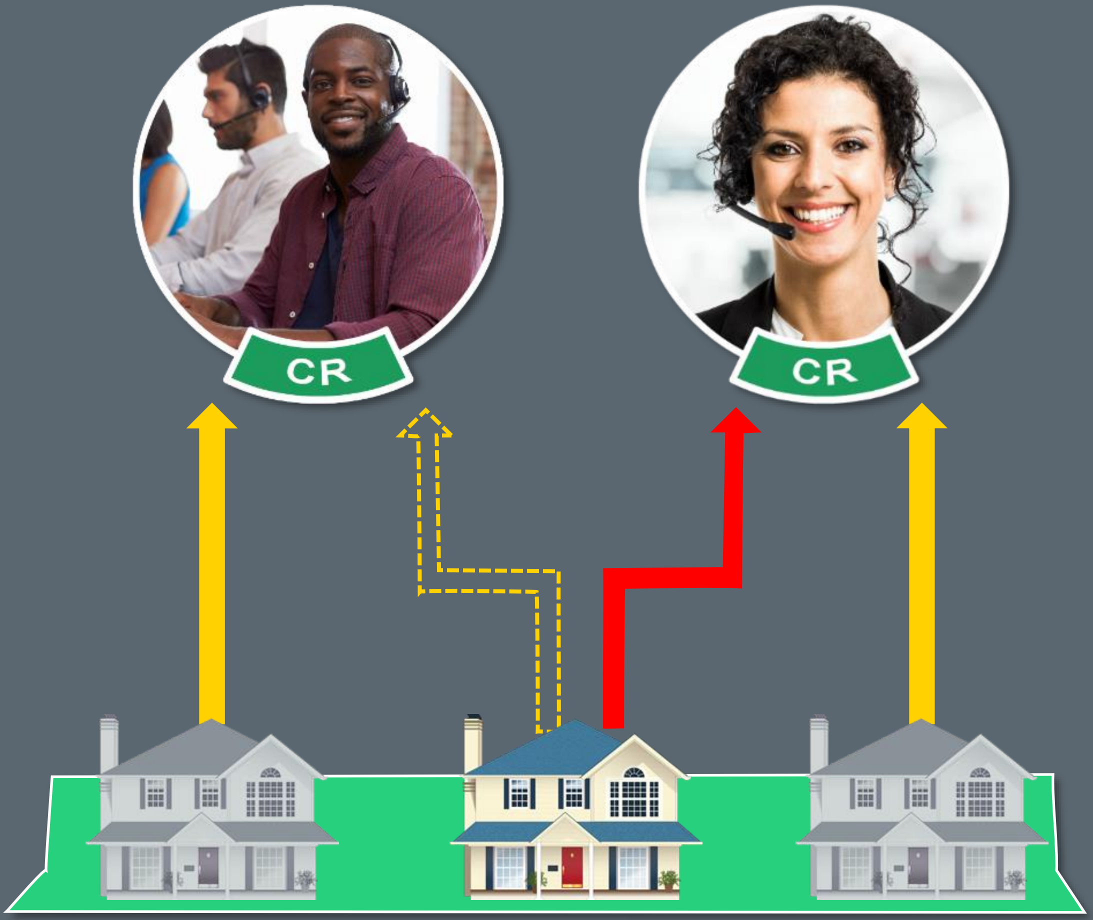
MarkeTrak

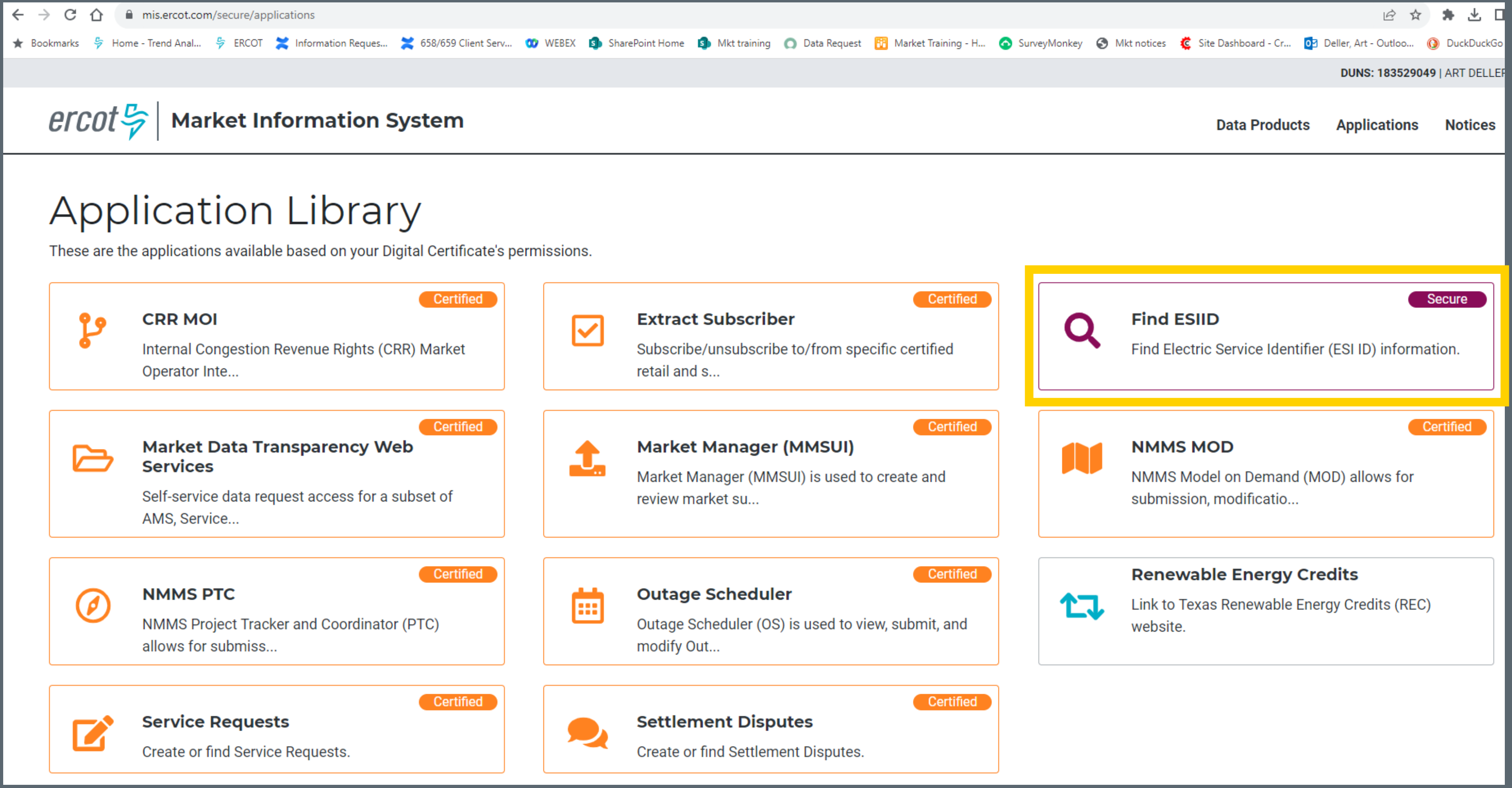
Scenario – Issues Resolution

What Happened?

- Customer should be with CR #1
- Customer is now receiving bills from CR #2



Scenario – Issues Resolution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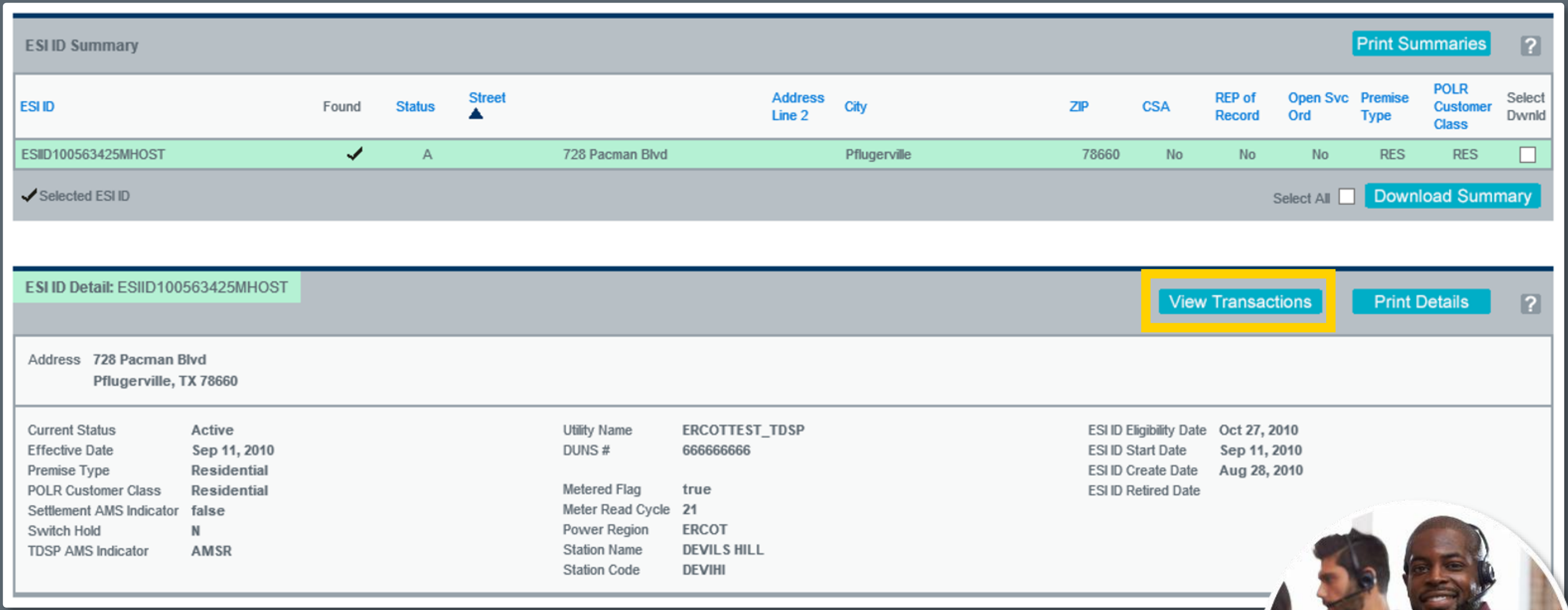
Create or find Settlement Disputes.

Find ESIID – CR1



ESI ID Summary

ESI ID	Found	Status	Street ▲	Address Line 2	City	ZIP	CSA	REP of Record	Open Svc Ord	Premise Type	POLR Customer Class	Select Dwnld
ESIID100563425MHOST	✓	A	728 Pacman Blvd		Pflugerville	78660	No	No	No	RES	RES	☐

✓Selected ESI ID

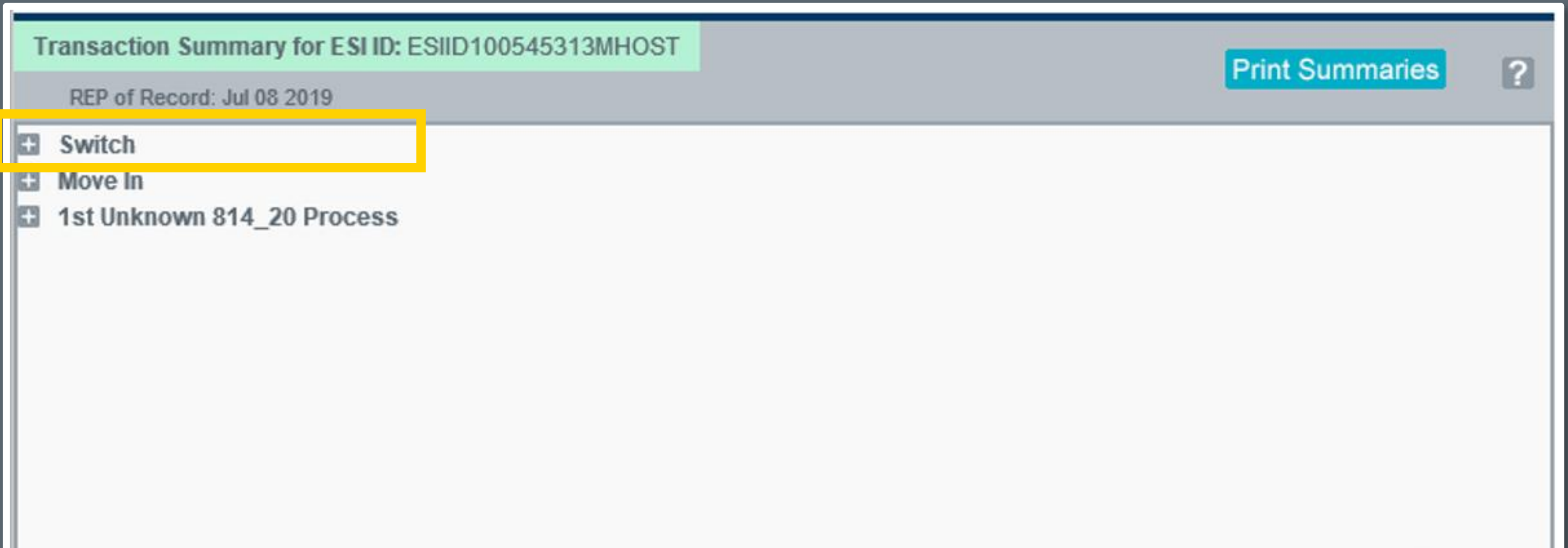
Select All ☐

ESI ID Detail: ESIID100563425MHOST

Address
728 Pacman Blvd
Pflugerville, TX 78660

Current Status	Active	Utility Name	ERCOTTEST_TDSP	ESI ID Eligibility Date	Oct 27, 2010
Effective Date	Sep 11, 2010	DUNS #	666666666	ESI ID Start Date	Sep 11, 2010
Premise Type	Residential			ESI ID Create Date	Aug 28, 2010
POLR Customer Class	Residential	Metered Flag	true	ESI ID Retired Date	
Settlement AMS Indicator	false	Meter Read Cycle	21		
Switch Hold	N	Power Region	ERCOT		
TDSP AMS Indicator	AMSR	Station Name	DEVILS HILL		
		Station Code	DEVIHI		

View Transactions – CR1

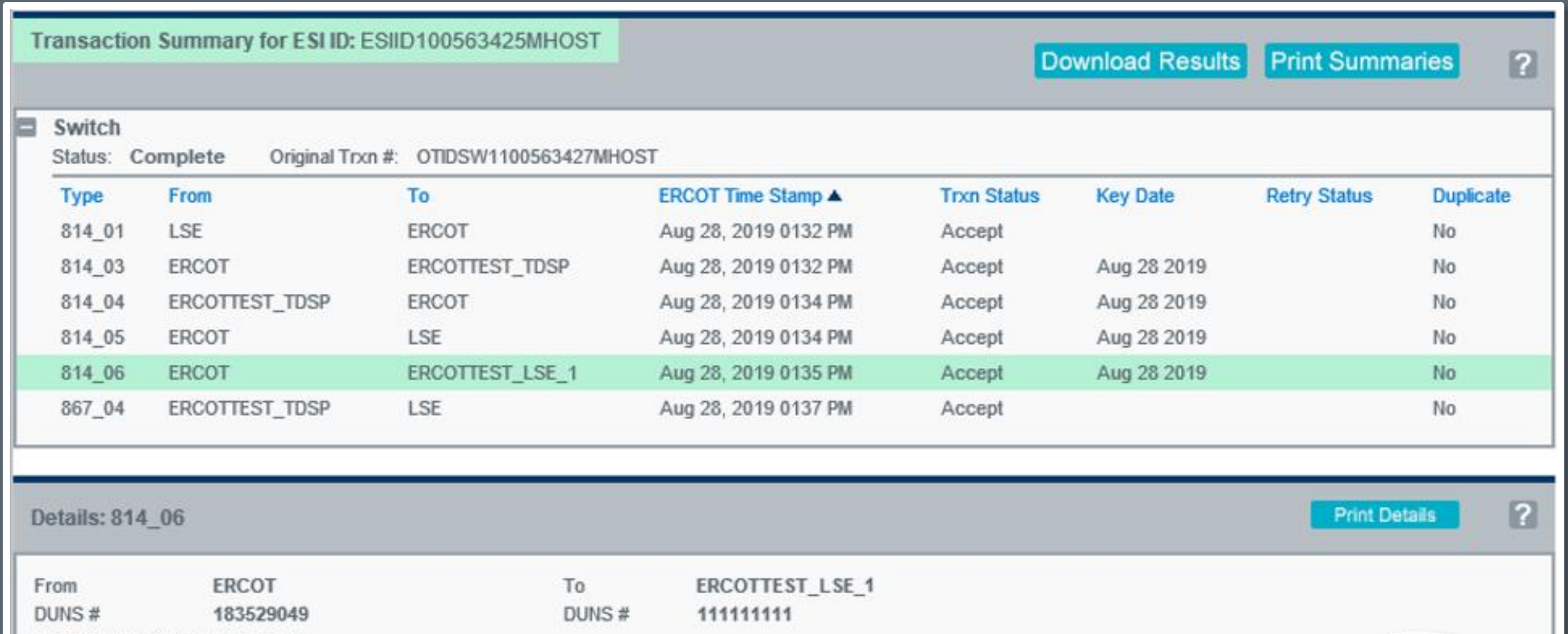


Transaction Summary for ESI ID: ESIID100545313MHOST

REP of Record: Jul 08 2019

Print Summaries
?
⊞ Switch
⊞ Move In
⊞ 1st Unknown 814_20 Process

View Transactions – CR1



Transaction Summary for ESI ID: ESIID100563425MHOST

Switch

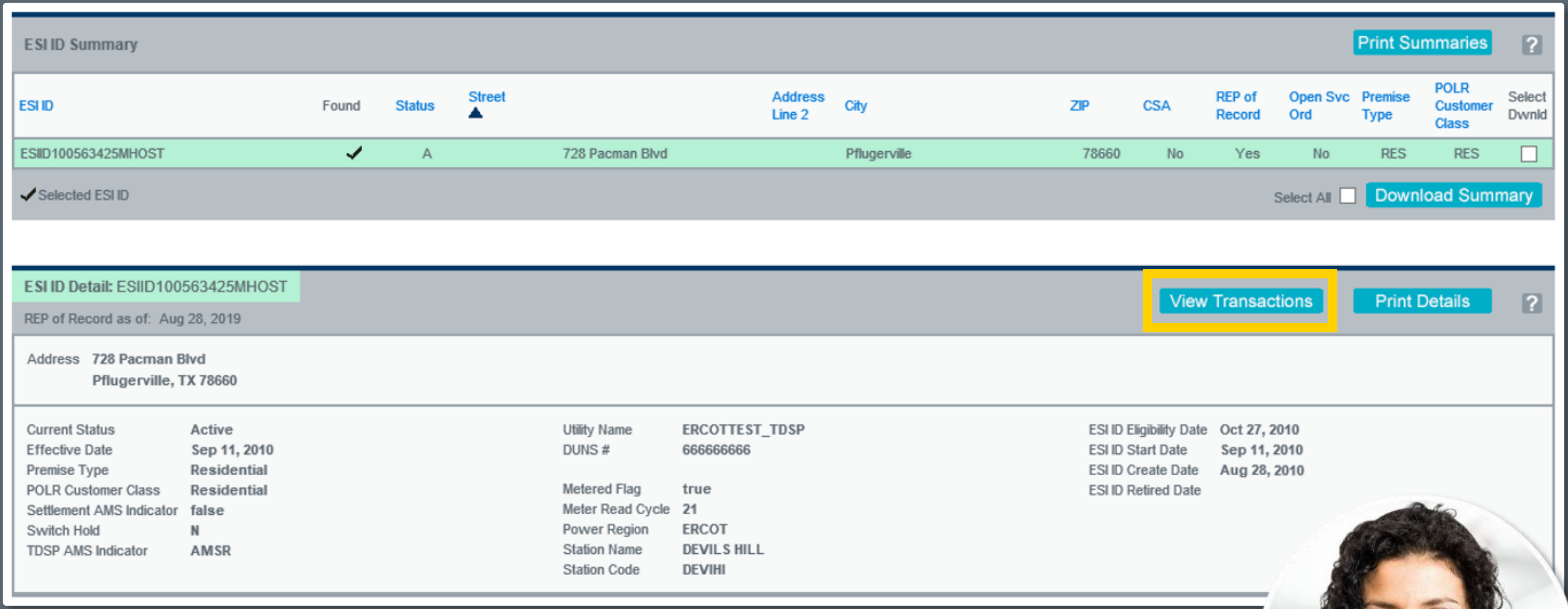
Status: **Complete** Original Trxn #: OTIDSW1100563427MHOST

Type	From	To	ERCOT Time Stamp ▲	Trxn Status	Key Date	Retry Status	Duplicate
814_01	LSE	ERCOT	Aug 28, 2019 0132 PM	Accept			No
814_03	ERCOT	ERCOTTEST_TDSP	Aug 28, 2019 0132 PM	Accept	Aug 28 2019		No
814_04	ERCOTTEST_TDSP	ERCOT	Aug 28, 2019 0134 PM	Accept	Aug 28 2019		No
814_05	ERCOT	LSE	Aug 28, 2019 0134 PM	Accept	Aug 28 2019		No
814_06	ERCOT	ERCOTTEST_LSE_1	Aug 28, 2019 0135 PM	Accept	Aug 28 2019		No
867_04	ERCOTTEST_TDSP	LSE	Aug 28, 2019 0137 PM	Accept			No

Details: 814_06

From	ERCOT	To	ERCOTTEST_LSE_1
DUNS #	183529049	DUNS #	111111111
Request Submitted	20190828		
Trxn Ref #	SBSW201908281335131WP4SF7	Status/Action	Request Delete
Orig Trxn Ref #	OTIDSW1100563427MHOST	Reason	CHA
Service Period End	20190828		

Find ESIID – CR2



ESI ID Summary

ESI ID	Found	Status	Street ▲	Address Line 2	City	ZIP	CSA	REP of Record	Open Svc Ord	Premise Type	POLR Customer Class	Select Dwnld
ESIID100563425MHOST	✓	A	728 Pacman Blvd		Pflugerville	78660	No	Yes	No	RES	RES	☐

✓ Selected ESI ID

Select All ☐

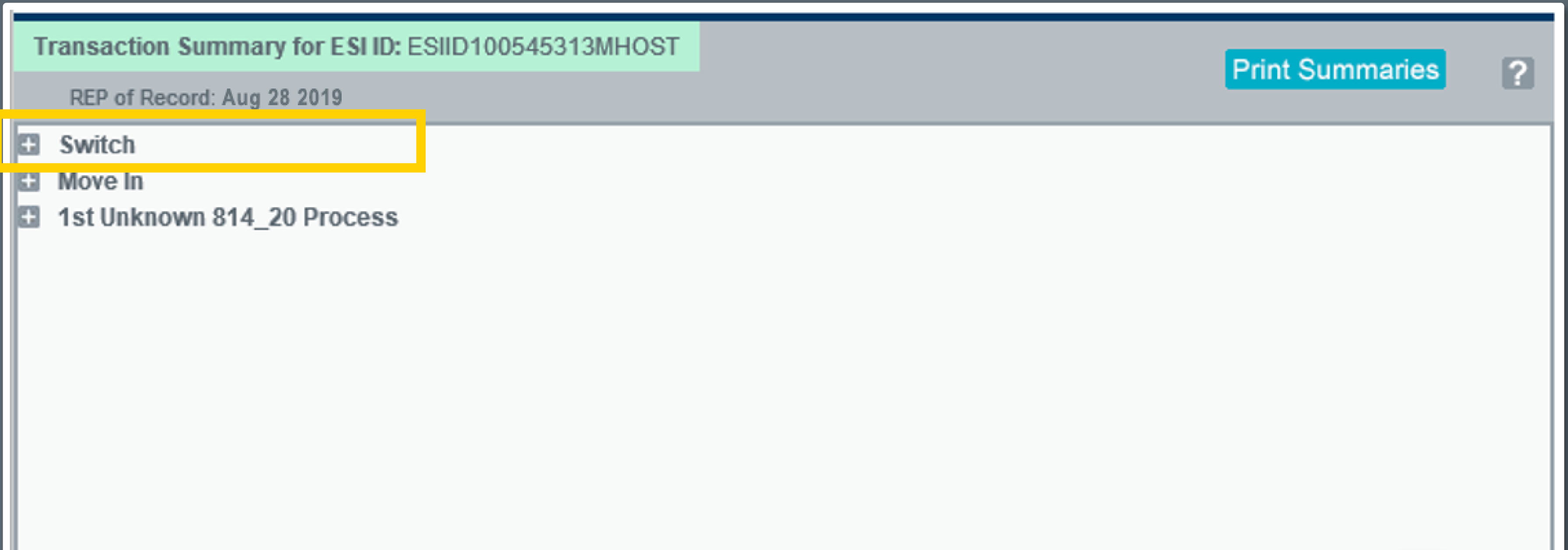
ESI ID Detail: ESIID100563425MHOST

REP of Record as of: Aug 28, 2019

Address **728 Pacman Blvd**
Pflugerville, TX 78660

Current Status	Active	Utility Name	ERCOTTEST_TDSP	ESI ID Eligibility Date	Oct 27, 2010
Effective Date	Sep 11, 2010	DUNS #	666666666	ESI ID Start Date	Sep 11, 2010
Premise Type	Residential			ESI ID Create Date	Aug 28, 2010
POLR Customer Class	Residential	Metered Flag	true	ESI ID Retired Date	
Settlement AMS Indicator	false	Meter Read Cycle	21		
Switch Hold	N	Power Region	ERCOT		
TDSP AMS Indicator	AMSR	Station Name	DEVILS HILL		
		Station Code	DEVIHI		

View Transactions – CR2

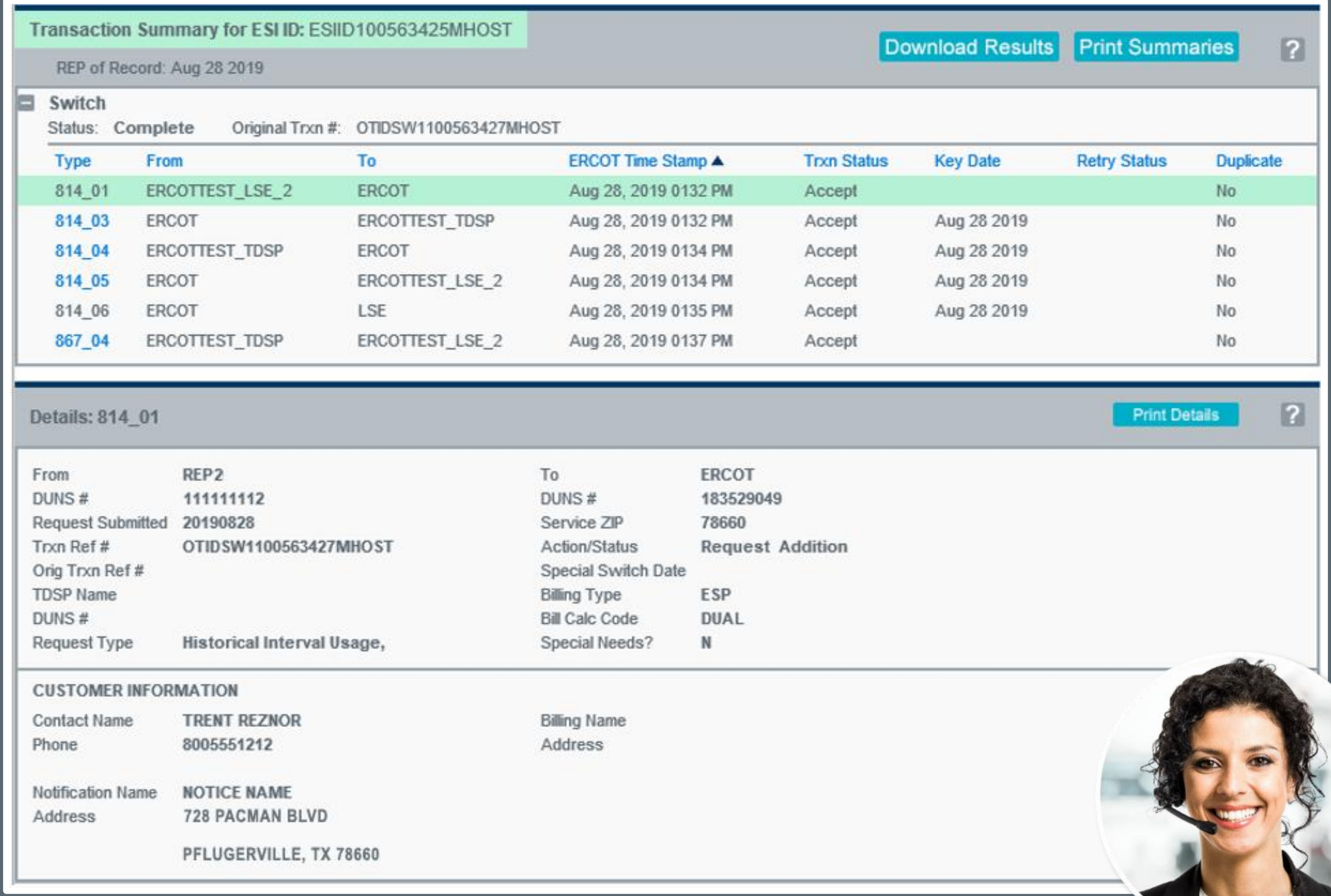


Transaction Summary for ESI ID: ESIID100545313MHOST

REP of Record: Aug 28 2019

Print Summaries
?
Switch
Move In
1st Unknown 814_20 Process

View Transactions – CR2



Transaction Summary for ESI ID: ESIID100563425MHOST

REP of Record: Aug 28 2019

Switch

Status: **Complete** Original Trxn #: OTIDSW1100563427MHOST

Type	From	To	ERCOT Time Stamp ▲	Trxn Status	Key Date	Retry Status	Duplicate
814_01	ERCOTTEST_LSE_2	ERCOT	Aug 28, 2019 0132 PM	Accept			No
814_03	ERCOT	ERCOTTEST_TDSP	Aug 28, 2019 0132 PM	Accept	Aug 28 2019		No
814_04	ERCOTTEST_TDSP	ERCOT	Aug 28, 2019 0134 PM	Accept	Aug 28 2019		No
814_05	ERCOT	ERCOTTEST_LSE_2	Aug 28, 2019 0134 PM	Accept	Aug 28 2019		No
814_06	ERCOT	LSE	Aug 28, 2019 0135 PM	Accept	Aug 28 2019		No
867_04	ERCOTTEST_TDSP	ERCOTTEST_LSE_2	Aug 28, 2019 0137 PM	Accept			No

Details: 814_01

From	REP2	To	ERCOT
DUNS #	111111112	DUNS #	183529049
Request Submitted	20190828	Service ZIP	78660
Trxn Ref #	OTIDSW1100563427MHOST	Action/Status	Request Addition
Orig Trxn Ref #		Special Switch Date	
TDSP Name		Billing Type	ESP
DUNS #		Bill Calc Code	DUAL
Request Type	Historical Interval Usage,	Special Needs?	N

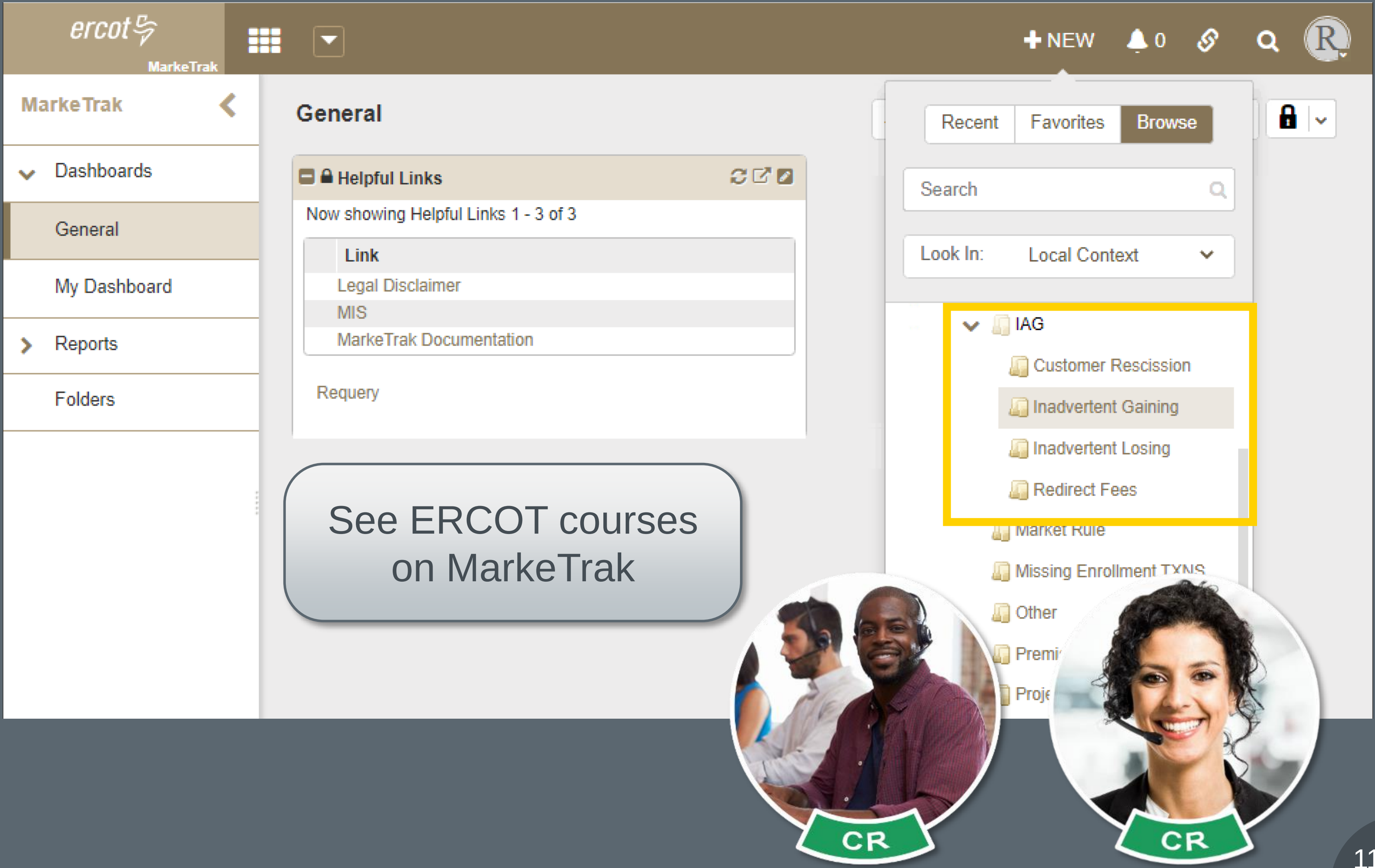
CUSTOMER INFORMATION

Contact Name	TRENT REZNOR	Billing Name	
Phone	8005551212	Address	
Notification Name	NOTICE NAME		
Address	728 PACMAN BLVD PFLUGERVILLE, TX 78660		

Clues

What Happened?
How Is It Fixed?

MarkeTrak Issue Submission – CR2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Reports
Folders
Recent
Favorites
Browse
Search
Look In: Local Context
CR
CR

General

Helpful Links

Now showing Helpful Links 1 - 3 of 3

Link
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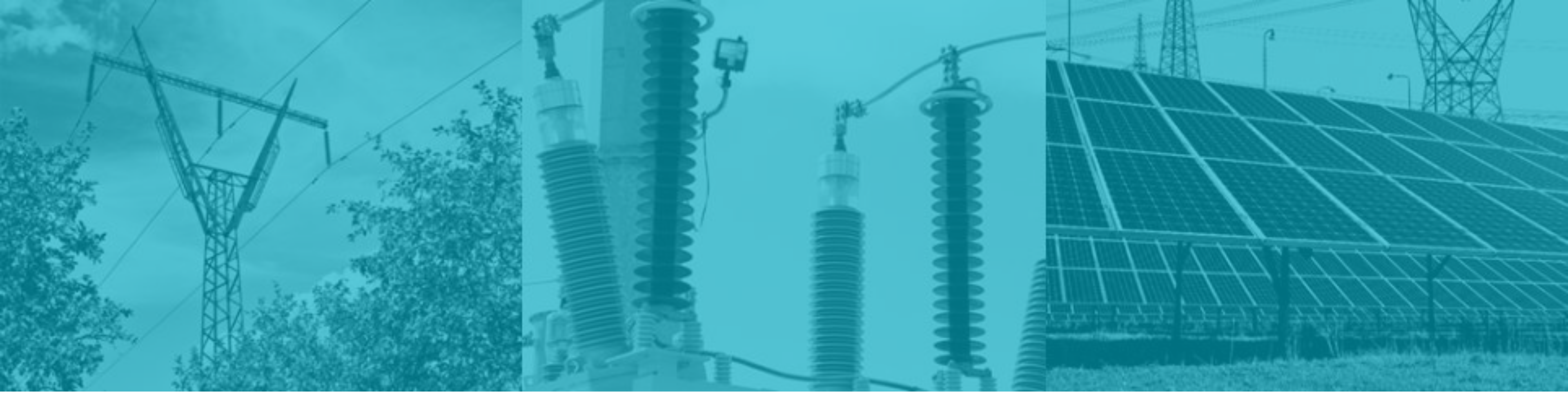
Requery

- IAG
  - Customer Rescission
  - Inadvertent Gaining
  - Inadvertent Losing
  - Redirect Fees
- Market Rule
- Missing Enrollment TXNS
- Other
- Premi
- Proje

See ERCOT courses on MarkeTrak



Course Conclusion

Recommended Courses

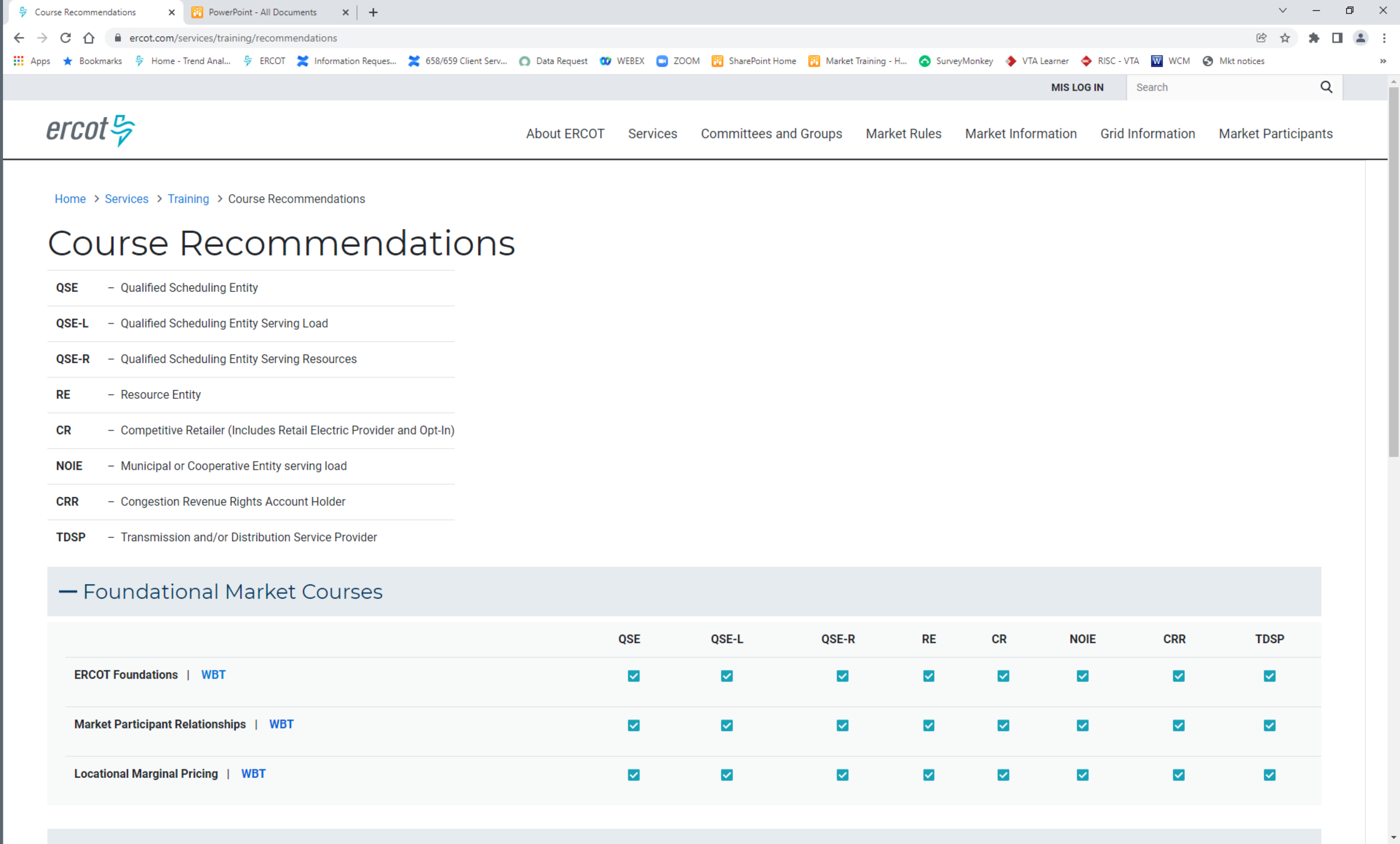
Pre-requisites

- ERCOT Foundations – WBT
- Market Participant Relationships – WBT

For more info, see …

- TxSET – ILT
- MarkeTrak – WBT
- LSE 201 – ILT and WBT

Next Steps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Market Participants

Home > Services > Training > Course Recommendations

Course Recommendations

QSE – Qualified Scheduling Entity

QSE-L – Qualified Scheduling Entity Serving Load

QSE-R – Qualified Scheduling Entity Serving Resources

RE – Resource Entity

CR – Competitive Retailer (Includes Retail Electric Provider and Opt-In)

NOIE – Municipal or Cooperative Entity serving load

CRR – Congestion Revenue Rights Account Holder

TDSP – Transmission and/or Distribution Service Provider

— Foundational Market Courses

	QSE	QSE-L	QSE-R	RE	CR	NOIE	CRR	TDSP
ERCOT Foundations | WBT	☑	☑	☑	☑	☑	☑	☑	☑
Market Participant Relationships | WBT	☑	☑	☑	☑	☑	☑	☑	☑
Locational Marginal Pricing | WBT	☑	☑	☑	☑	☑	☑	☑	☑

Additional Resources

- ERCOT Client Services
  Clientservices@ercot.com

- ERCOT Mailing Lists
  http://lists.ercot.com/

- ERCOT Nodal Market Protocols
  http://www.ercot.com/mktrules/nprotocols/

- ERCOT Training
  http://www.ercot.com/services/training/

- Market Education Contact
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