**TDTMS**

**February 19th, 2024, 9:30 PM**

**WebEx only**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Attendee | Company | Attendee | Company | | Attendee | Company |
| Jordan Troublefield | ERCOT | Bill Snyder | | AEP | Monica Jones | CNP |
| Dave Michelson | ERCOT | Kyle Patrick | | NRG | Eric Lotter | GridMonitor |
| Sheri Wiegand | Vistra | Mick Hanna | | ERCOT | Kathy Scott | CNP |
| Catherine Meiners | ERCOT | Steven Pliler | | Vistra | Rob Bevill | TNMP |
| Amy Sue Stirland | LP&L | Sam Pak | | Oncor | Tammy Stewart | ERCOT |
| Kathryn Thurman | ERCOT | Edelmire Pena | | Revolution | William Butler | LP&L |
| Jesse Macias | AEP | Sydney Driver | | Revolution | Laura Gomez | LP&L |
| John Schatz | Vistra | Debbie McKeever | | Oncor |  |  |

Monica Jones opened the meeting, read the Antitrust Admonition, and introduced attendees.

Meeting minutes from the January 14th meeting were reviewed (including ACTION items) and approved.

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

* Market SLAs met for January. MarkeTrak performance is good for January 2025 and volumes remain relatively flat, excluding October 2024.
* MarkeTrak issue experienced 2/10 where failover configuration on temporary space prevented data from replicating and the validation when returned was not as “deep”. As a result, the MT features were not working as expected. The MT vendor will be developing a ‘fix’ which is expected by the next meeting. ERCOT will however be performing new validations going forward.
* 2/11 – 2/12 MT experienced an ‘excessive license capacity’ error. ERCOT is evaluating different options to mitigate:
  + Attempted to decrease the ‘time-out’ automatic log out, however, currently set at the minimum of one hour.
  + Encouraging users to ‘log out’ vs ‘x’ out to clear the occupied license. ERCOT currently has a threshold of ~200 concurrent licenses.
  + ERCOT investigating to determine if certification and production environments may perform license pooling to gain efficiency
  + If necessary, ERCOT may need to increase the number of concurrent licenses to meet the needs of the MT users
  + TDTMS suggested RMTTF communicate the log out issue during training. ACTION: Tammy Stewart to send a screenshot of the ‘log out’ feature vs ‘x’ out to clear the occupied license to include in training.
  + A couple of additional notes:
    - Each browser will be DUNS specific, therefore a user may be logged into MT on Chrome and also on Edge
    - API is a different license therefore not included in the concurrent licenses utilized
    - Typically, Mondays are heavy MT use days
    - ERCOT does not have visibility in the MT roles of a digital certificate

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AI-generated content may be incorrect.

* Weather Moratorium listserv had multiple ‘unsubscribes’ from Shell Energy
* It was reminded ‘unsubscribes’ occur either due to cyber security link, auto delete after 10 bounce-backs within 30 days, or user unsubscribes.

**SCR817**

* **Mapping of 867 vs Sum of LSE data –** ERCOT indicated this was an easy fix to move under the Usage & Billing family of MTs in the rolodex. ACTION: Tammy will perform and test the change.
* **Lessons Learned for SCR817 –** 
  + When creating new subtypes, need to define rolodex mapping to one of six categories
  + RMG 7.3.4.1 clarifying why rejects would occur to reduce confusion of REPs - ACTION: collaborate with RMTTF to clarify in training…

7.3.4.1 Transmission and/or Distribution Service Provider Transaction Processing Rejections

(1) If the backdated 814\_16, Move In Request, does not contain the Inadvertent Gain “IA” or Customer Rescission “CR” indicator, the TDSP shall reject the backdated 814\_16 transaction with a reject response of Date in the Past “DIP”.

(2) If the backdated 814\_16 transaction includes the Inadvertent Gain “IA” or Customer Rescission “CR” indicator, but the move in date is greater than 150 days in the past, the TDSP shall reject the backdated move in transaction with a reject response of “150”. The TDSP shall not cancel and rebill invoices greater than 150 days in the past from the date that the move in transaction was received. Upon the Competitive Retailer’s receipt of the reject response of “150”, the Competitive Retailer shall take the appropriate action(s) to correct the backdated move in date before resubmitting their transaction to the TDSP.

* SCR817 Training worked well - ~400 market participants
  + ~400 market participants logged onto training
  + Timing – one when new functionality was placed in RMTE and another right before ‘go live’
  + Tammy Stewart developed a resource presentation that was leveraged by market participants for internal training
* Weekly emails during transition – before, during, and after the transition offering instruction on in-flight IAGs
* Banner on MarkeTrak tool was helpful in informing users of changes were upcoming and provided a link for additional information
* Need to encourage testing in the RMTE prior to go live by launching awareness campaign via market notices, RMS meetings, working group meetings, etc
* Provide specific direction on how to obtain digital certificate for RMTE – create and distribute document on ‘how to’
* On-line module updates should be timely and coordinate with RMTTF, closing the loop to ensure updates are available at go live

**Critical Care Flags & Tampering Flags Post IAG**

Continued discussion on flags applied after IAG. CNP clarified for Critical Care/Chronic Care flags with the system changes and new functionality that was developed with TX SET v5.0, CNP built logic in their production systems for MVIs with “IA” or ”CR” codes to be treated as SWI (814\_01) thus allowing all attributes and Customer specific statues to remain in place. (For example: Critical/Chronic Care Customer, 4CP or Billing Demand, Standard Meter Opt-Out, SMT and/or Power Alert Registered Customer(s)). REPs would receive all of the same Critical/Chronic Care information instantaneously on an 814\_05 MVI response transaction in lieu of an 814\_20 ESI ID Maintenance update that would be forwarded to the REP of Records following the completion of the MVI transaction(s).

For CNP, tampering Switch Hold flags are removed with an “IA” or “CR” code since the MVI creates the “Final Billing” of current REP of Record, also in the case of a Tampering Switch Hold the current REP of Record must release the Switch Hold prior to CNP accepting the IAG MVI for processing. CNP will not reinstate the Tampering Switch Hold since per the PUCT Rule 25.126 an MVO/Final Bill shall remove the corresponding Switch Hold flag either Tampering or Deferred Payment. It was explained, it would be the REP of Record’s decision to remove the Tampering Switch Hold should an IAG occur where an SH is originally in place. The question became, if the SH was put in place *after* the IAG occurred and the Gaining REP attempted to send the ESI back to the Losing REP. CNP indicated cancel/rebilling of the tampering charges would not occur and the Gaining REP would be responsible for the tampering charges as CNP would apply the regain date to after the period in which the tampering occurred. CNP drew on their support of PUC Substantive Rule 25.126, while the REPs drew on their support of PUC Substantive Rule 25.495. Most importantly, it was noted that CNP has <100 Tampering Switch Holds in place, to date none have been involved with a IAG situation.

**MarkeTrak Subtype Volume Analysis 2024 update & IAL analysis**

TDTMS leadership requested the latter half of 2024 MT subtype “raw” volumes to determine overall trends. Data attributes were also requested for the second half of 2024. Dave Michelson indicated with the changes in SCR817 a few tweaks needed to be made to their query. TDTMS leadership will meet with ERCOT to review data, if necessary, when available. Kathy had suggested the data from January to October be reviewed (July – Oct) to avoid the SCR817 changes.

**2025 GOALS –** reviewed no revisions

**NEXT MEETING: April 22nd @ 1:30 PM** - March 11th meeting will be cancelled

TXSET/TDTMS/PWG leadership will coordinate possible F2F meeting at ERCOT MET Center, thus dates and times are subject to change.

**Other Business –** Kathy Scott thanked Kelly Brink and Dave Michelson for their explanation of the ERCOT extracts at the last TDTMS meeting. She reported the insights were helpful to develop their internal functionality in “joining the extracts” to provide the data needed.

Meeting adjourned at 11:23 PM.

**NEXT MEETING:**

**DRAFT AGENDA**

* Follow up on Action Items
  + Posting of MT analysis data on main TDTMS page – IAG, IAL, Other
* ERCOT Reports
  + System Instances & MT Performance
    - MT update from 2/10 – 2/12 issues
    - MT users #
  + Listserv
* Quarterly Review of ERCOT Inadvertent Gain Reporting
* MT Subtypes Volume Analysis – IAL – results
* MarkeTrak Information Page