**TDTMS**

**October 18th, 2023**

**WebEx only**

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| --- | --- | --- | --- | --- | --- |
| Attendee | Company | Attendee | Company | Attendee | Company |
| Diana Rehfeldt | TNMP | Dave Michelson | ERCOT | Kyle Patrick | NRG |
| Lori Lee Barfield | Just Energy | Dee Lowerre | NRG | Monica Jones | CNP |
| Angela Ghormley | Calpine | Sam Pak | Oncor | Eric Lotter | GridMonitor |
| Sheri Wiegand | Vistra | Bill Snyder | AEP | Edelmira | Revolution Energy |
| Mick Hanna | ERCOT | Steve Pliler | Vistra |  |  |
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Sheri opened the meeting with the Antitrust Admonition and announced attendees.

Minutes from the September 21st meeting were reviewed and approved.

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

* Mick presented **September performance reports** and noted all SLA targets for September were met along with MarkeTrak response times continuing to perform well, trending down.
* **2024 retail release calendar–** market participants should expect 12 releases for 2024 that are less in duration. The goal is faster with improvements in a shortened time frame to minimize impacts on outage times. ERCOT is finalizing the dates and will post when made available. Typically, TDTMS reviews release dates prior to RMS vote.
* **Listserv activity** –
  + - More posts in September than there ever were
    - ERCOT is seeking a high performance license for the listserv platform so not to impact the GUI
    - e.g. 20,000 subscribers to TXANS listserv was compromising speed of the GUI
* **MIS API project update –** No new updates. Testing is currently scheduled for week of 11/6 to 11/11. All market participants interested in digital certificate for test environment should email Dave Michelson. Go live is still planned for 12/10. ERCOT will no longer support the old ‘mime’ platform and plans to reach out to those current users to ensure they will be prepared for transition. WSDL files have been created for testing. <https://www.ercot.com/files/docs/2023/09/19/Retail-MIS-API-Technical-Files.zip>
* **TDTMS EDM Implementation Guide update –** posted here <https://www.ercot.com/mktrules/guides/data_transport>
* Reminder on **extended outage** for data warehouse maintenance. Processes that support extracts will be unavailable during outage scheduled for 10/19 @ 9 am until 10/20 @ 23:59. Notice: <https://www.ercot.com/services/comm/mkt_notices/M-B101623-01>

**SCR 817 MarkeTrak Validations –**

Dave reported testing is ahead of schedule and no concerns.

**MarkeTrak Switch Hold Removal DRAFT RMGRR –** Kyle Patrick presented proposed language for the RMG adding clarification to the “copy of current lease” option in addition to the New Occupancy Statement for the removal of a switch hold. A few revisions were agreed upon and the language will be presented as follows:

A close-up of a document

Description automatically generated

ACTION: Sheri will send cleaned up version of the draft RMGRR to the listserv soliciting comments, then will submit to Market Rules for RMS consideration. One suggestion for RMTTF training on Switch Hold Removals is for the “unexecuting REP” to provide a reason as to the unexecution or denial in removing the switch hold.

**MarkeTrak Inadvertent Gain / Inadvertent Loss Subtype Analysis**

Sam walked through the various steps of the IAG and IAL processes noting top “offenders” and any outliers in each phase. Below is a summary of the data reviewed. This information along with the earlier MT volume subtype analysis with talking points will be sent to Client Services to communicate with the REP population. The goals of reviewing the data were:

* 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

ACTION: Sam will clean up the tabs of the large spreadsheets and have posted to the main TDTMS page for REP reference. It was also discussed the cadence for MT review should be once every six months. At this point, TDMTS will make the request for “data dump” from Dave Michelson for the first half of 2023. The review process is not expected to take as long since the review structure has been established.







**NEXT MEETING** scheduled for November 16th has been tentatively cancelled. Our final meeting for the year is scheduled for **Wednesday, December 13th**.

* ERCOT Updates
  + System Instances & MT Performance
  + Listserv
  + MIS API review
* SCR817 Business Requirements discussion, if needed
  + Preparation for implementation – training docs
* RMGRR Switch Hold Removal Clarification
* Data/Talking Points for Client Services on MT Analysis