|  |  |  |
| --- | --- | --- |
|  | Issue | Lesson Learned |
| 1 | Customers with Multiple ESI IDs and DREP Process | find a way to compare before defaulting – possibly providing customers with ESIs on their bundle bill prior to competition; create ESI IDs earlier in the process |
| 2 | TXSET Guides need updating | we need to take some time and make sure we've captured the areas that need to be changed – ‘combo’ 814\_05 kH vs kMON  Decimals  Generalized practices – perhaps a “utility orientation” |
| 3 | Need Regulatory/Legal decisions at beginning of project | Full awareness of any impacting legislation  Early conversations  LP&L has paved the way for additional MOU/ECs |
| 4 | Impact of Cycle Dates locked down and True Move In Situations | Impacts stacking logic at go live  Clear determination so REPs may design systems accordingly |
| 5 | Phone number formats Country Code issue | Update TXSET guide |
| 6 | Clean Data for ESI ID Creation | Avoid creation of “bad” ESIs only to have to retire  Eliminates downstream activity  Understanding with a Muni other utilities may be associated |
| 7 | Addresses without description | System should be able to use secondary address fields to help avoid inadvertent gain situations |
| 8 | Decimals in Meter Reads | With AMI being the normal meter type, this is an opportunity to allow decimals in meter reads.  We are already using them in IDR situations |
| 9 | Priority Codes for MVIs and Reconnects | should be included in RMG along with other priority codes (Service Orders) |
| 10 | TDSP Matrices in one location | one place  TDSP matrices: AMS, EOP, Solar Practices, Transaction Timelines  Including list in ERCOT opt-in checklist |
| 11 | online enrollments - what options for more than one ESI ID? | better customer experience if more than 1 ESI ID to enroll  Providing a postcard to each customer with information prior to sales window |
| 12 | Cancel/Rebill timing and LSE files | This information is not captured in any Protocols or Guides at ERCOT…it's more of an ERCOT business process that affects the Utilities process.  How can we capture that for the next new entrant?  Opportunity to include in operating guide for settlements |
| 13 | Full testing | Robust end to end testing with ‘real’ data and include billing |
| 14 | Awareness of all files and extracts on ERCOT MIS | Understanding of extracts available and purpose of data |
| 15 | Shopping Fairs | WIN! Having a media market in a condensed geographical area resulted in effective communications to the residents  Providing questions for consideration – shopping guide and partnership with PUCT  Knowing the audience and conducting business/enrollments how community wants to conduct business |
| 16 | Market Participants | Market participants were disengaged until the last minute  Requiring participation in task force meetings if want to become active in territory |
| 17 | EPS Meters | Understanding if territory has EPS meters, Muni will need to accept 867s from ERCOT |
| 18 | Understanding market processes | DNP/RCN processes and billing, ESI Maintenance and updating attributes |
| 19 | ERCOT Settlement Process | Understanding of the settlement differences of BUSIDRRQ, significance of LSE files and reversions, and impacts of cancel/rebills |