**MarkeTrak Task Force Meeting Notes**

January 27, 2015

CenterPoint Energy Tower Offices, Houston

**Attendees**:

Diana Rehfeldt TNMP Diana.rehfeldt@tnmp.com

Carolyn Reed CenterPoint Energy Carolyn.reed@centerpointenergy.com

Jim Lee Direct Energy jim.lee@aep.com

Debbie McKeever Oncor Deborah.mckeever@oncor.com

Sheri Wiegand TXUE sheri.wiegand@txu.com

Monica Jones Reliant-NRG via WebEx

Cheryl Franklin AEP via WebEx

Tammy Stewart ERCOT via WebEx

Mary Sithihao Stream Energy via WebEx

Dave Michelson ERCOT via WebEx

Sandra Tindall ERCOT via WebEx

Jenny Evanson Sharyland Utilities via WebEx

**SLO Results with CNP/Oncor API queries**

Dave Michelson presented for Dave Pagliai of ERCOT. ERCOT had reviewed how the SLO is monitored for current API users (CNP/Oncor). It is understood the current method does not represent an accurate reflection of performance and how the API is used today. A new methodology was tested. Data results are available and have been shared with API users. The information will be shared at a later date to the market, yet is available to interested parties. It has not been determined if the current SLO will be replaced, transitioned to the new metric, or the new metric will be added. Next steps include presenting information to TDTWG for their review. ERCOT will lead presentation (ACTION ITEM). MTTF will then reach the final decision on the SLO.

**Final Recommendations to RMS**

The task force discussed at length “short term” and “long term” recommendations/goals for 2015 and beyond. The “short term” activities are anticipated for completion prior to sunsetting the task force. The “long term” recommendations will transfer to TDTWG at the direction of RMS.

* Short Term Goals:
  + Develop a one-page reference sheet to define MarkeTrak (MT) SubTypes
  + Spring/Fall Face-To-Face (F2F) MT Detailed SME trainings
    - Spring Training: Inadvertent/Usage and Billing/AMS - LSE SubTypes review
      * Group the most utilized MT SubTypes for Spring training to provide a more detailed instruction
      * ERCOT mock-up data for visual MT tool interface – utilize ERCOT’s ability to mimic all three roles (ERCOT, CR, TDSP)
    - Fall Training: **Comprehensive** MT Detailed 101 Training
      * ERCOT mock up data for visual MT tool interface – same as above
  + Q2 RMS IAG training – will determine if this is to be offered on a recurring basis. ACTION ITEM: Carolyn Reed will coordinate with Kathy Scott communication to Bill Kettlewell of ERCOT’s Training Team to discuss on-going MT and IAG training(s). For long term **MT Detailed 101 Online training**, MTTF will work with ERCOT (B.Kettlewell) to develop syllabus. For any ad hoc training efforts, working groups may coordinate with Dave Michelson of ERCOT.
  + Recommend to RMS that MT on-going training be required for new Market Participants in conjunction with Flight testing.
  + Recommend to RMS revisions are needed via the **ERCOT** **Retail 101** training to be consistent with the current Retail Market Guide (RMG)
  + Mid review of API/GUI SLO metrics
    - To determine if revisions are necessary to reflect actual API/GUI performance
* Long Term Goals:
  + Work with TDTWG to ensure that the new Retail testing environment can accommodate MT training and testing functionality
  + Recommend further analysis of ‘Submission Timelines’ for Customer Rescission (Currently 25 days – RMG 7.3.5(2))

**Overlapping of 810 Billing Dispute Process**

This issue was originally introduced last year after SCR756 was implemented. With the new validation in place, MPs were no longer able to submit Usage/Billing subtypes when MPs were not the ROR. Also referencing RMG 7.8.2 *Guidelines for Notification of Invoice Dispute* , clarification between a “formal” dispute vs a MT dispute was discussed. Carolyn Reed indicated her interpretation was any dispute or discrepancy within the billing month should be submitted via a MT. Outside of that window, the “formal” dispute email process should be followed. It was noted, the email box for CNP’s formal dispute process was directed to the incorrect team to handle such issues where an 810 is being disputed for a period where the MP was not the ROR. Tammy Stewart had confirmed the OTHER subtype does not have a ROR validation in place and this subtype should be selected to issue such disputes. ACTION ITEM: Market participants are encouraged to provide clarity on their interpretation of a “formal” dispute vs a MT dispute. Tammy Stewart will review the User’s Guide for clarity. Diana Rehfeldt had pointed out sections 4.9 and 4.4.8 of the tariffs also discussed disputes.

**User’s Guide Updates**

Tammy Stewart reported she has posted three documents regarding User’s Guide updates – v3.0, Tips and Tricks. ACTION ITEM: Tammy Stewart will add to the Usage & Billing section a recommendation to allow the appropriate transactions to process prior to submitting MTs.

**RMGRR – Revision to Customer Rescission Completion Timeline**

RMGRR has sent to the RMS listserve. MTTF will review any comments received by next meeting. It is anticipated RMS will vote on RMGRR at the March RMS meeting 3/3/15.

**NEXT MEETINGS**– priot to ‘sunsetting’ task force

**February 17, 2014** – **ONCOR** Dallas Texas (ONCOR office)

**March 24, 2014** - **CNP Tower** Houston Texas (CNP Tower Room 631) @9:30

* <https://centerpointenergy.webex.com/centerpointenergy/j.php?J=623943515>
* Main Number: 1-713-2073004/Toll Free Number: 1-888-7133004
* Cisco Unified MeetingPlace meeting ID: 623 943 515

**April 28, 2014** – **ERCOT** Office Austin Texas (Room 168) @**10**