**MarkeTrak Task Force Meeting Notes**

February 17, 2015

Oncor Electric Delivery, Dallas

**Attendees**:

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Cheryl Franklin AEP via WebEx

Diana Rehfeldt TNMP via WebEx

Tammy Stewart ERCOT via WebEx

Dave Michelson ERCOT via WebEx

Lindsay Butterfield ERCOT via WebEx

Dave Pagliai ERCOT via WebEx

Kelly Tidwell Direct Energy via WebEx

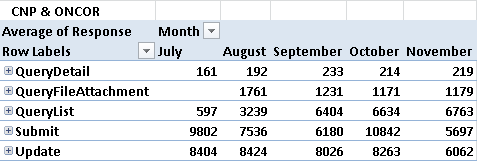
Rhiannon Morrison Gexa Energy via WebEx

NES

Raquel

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

* Dave Pagliai of ERCOT again clarified the methodology for the current SLO and the use of “test case” response time – from the time the user logs on, executes the query, response time, then logging off
* The data collected for the proposed metric is a simple average of the actual response times as recorded in ERCOT’s integration system for the query performed. The response time measures from API to API and back – eliminating the log on and log off time. This methodology should be more representative of the response times experienced by users today.
* The Submit query times can range significantly depending on the amount of ‘look-ups’ in Siebel. A current SLO does not exist for this query type
* Below is the data presented in milliseconds



* **ACTION ITEM:** Dave had asked API users to review their ‘pain points’ with current response times. ERCOT will provide response time data to API users around mid-March prior to the next MTTF meeting for their review and comparison with response times they are experiencing.
* Next steps on the proposed SLO will be discussed at the next meeting pending API Users review of the data

**Short Term & Long Term Goals**

* **Short Term:** 
  + Develop one page reference sheet to define MarkeTrak (MT) SubTypes – definitions will be used from the User’s Guide
  + Spring/Fall Face-To-Face (F2F) MT Detailed SME trainings
  + Tentative RMS IAG Training Dates:
    - Austin- May 12, 2015 – Carolyn to confirm with ERCOT on room availability
    - Houston- May 15, 2015 Carolyn will confirm
    - Dallas- June 12, 2015 Debbie will confirm
      * ACTION ITEM: SME RMS training decks need to be prepared for April 28, 2015 meeting
      * ACTION ITEM: Prepare Survey questions to send to Ted H. and Dave M. (first to mid-April) to address specific market needs Carolyn to send to Ted
    - Spring Training: Inadvertent/Billing and Usage SubTypes
      * Group the most utilized MT SubTypes for Spring training
      * ERCOT mock up data for visual MT tool interface
    - Fall Training: **Comprehensive** MT Detailed 101 Training
      * ERCOT mock up data for visual MT tool interface
      * Fall 2015 Training will be coordinated via TDTWG and will include SMEs as well similar to the 2014 MT Detailed training.
    - MT trainings for 2016 and going forward will be coordinated via the RMS Retail Training TaskForce
  + Q2 RMS IAG training - Kathy Scott work with Bill Kettlewell to coordinate on-going MT and IAG training(s). For longterm **MT Detailed 101 Online training**, MTTF will work with ERCOT (B.Kettlewell) to develop specifics and posting of documents.
  + 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
    - Dave P. to send CNP/ONCOR new API metrics from July 2014 to January 2015 ~ by February 27, 2015.
      * CNP/ONCOR work with ERCOT on comparisons from actual data transactions via API. The old SLO metrics were actually ‘test data scenarios’ which was not the best method to report market API metrics.
* **Long Term:** 
  + Work with TDTWG to ensure that the new Retail testing environment can accommodate MT training and testing functionality – TDTWG is currently discussing
  + Recommend further analysis of ‘Submission Timelines’ for Customer Rescission (Currently 25 days – RMG 7.3.5(2)) – ACTION ITEM: TXU Energy will carry forward with TDTWG once RMGRR 129 has been approved. An SCR will need to be requested for ERCOT to change the current validations in the system for the “25 day submittal” guideline.

**Overlapping of 810 Billing Dispute Process**

* Market participants, CRs and TDUs, reviewed their processes for when MTs versus when emails are submitted for 810 billing disputes considering the new validations in place in MT (in order to submit a Usage & Billing dispute subtype, CR must be ROR).
* One market participant utilizes the email process as outlined in the RMG to submit 810 disputes after an esi id has ‘finaled’ (receipt of an 867F).
* TDUs and other CRs discussed utilization of the MT system which allows for accurate logging and tracking of an issue as well as culpable SLAs.
* For such instances where a CR may dispute tampering, RC/DC charges, service orders, etc where they are no longer the ROR, it is encouraged to submit the OTHER subtype MT.  And then use the comments section to detail the dispute.  Validations are not in place on this subtype to be the ROR for the esi id of concern
* TDSPs noted they will not prohibit email disputes, yet encouraged use of MT system instead
* ACTION ITEM: TDSPs will present the revisions for the RMG 7.8.2
* ACTION ITEM: Tammy Stewart will update the User’s Guide to reflect the use of OTHER for disputing 810s where the CR is no longer the ROR.

**User’s Guide Updates**

Revisions were proposed to the addition of the comments in section 4.3.2.1 allowing adequate time for transaction processing prior to submitting a MT for resolution. Adequate time was defined as not less than 5 business days. ACTION ITEM: Carolyn will make modifications to the User’s Guide in above section and AMS LSE section and forward to Tammy Stewart for inclusion in the User’s Guide.

**RMS Inadvertent Training**

Reviewed high level agenda for proposed training

* + High level overall responsibilities              John Schatz, TXUE
    - General overview- bad customer experience
    - IGL drivers
    - Prevention of IGLs
  + IAS Process
    - CR perspective                               Tomas Fernandez, NRG
    - TDU perspective                              Corde Nuru, CNP
  + RMGRR Revision to Customer Rescission Completion Timeline                   Jim Lee, AEP
  + Market Challenge                                            John Schatz, TXU

A few suggestions for the training are as follows:

* Include a flow chart of the process
* Streamline use of existing training decks
* Detailed instructions how to process an issue

ACTION ITEM: Presenters should have respective decks prepared for a “run-through” on April 28th MTTF meeting

ACTION ITEM: Carolyn has offered to create a survey question to be sent to RMS and MTTF list serves polling training participants on specific topics/issues they would like to see covered during training. Carolyn will facilitate through Ted Hailu with Client Services.

**MarkeTrak Issues – Premature closing of IGL/Rescission subtypes**

* On both 2/3 and 2/11 a large number of MTs (IGL and customer rescission subtypes) prematurely auto closed due to a database parameter change.  The “clock” had changed for “auto closure” after 15 *days* to 15 *minutes*.  ERCOT was unable to root cause or correlate the revision.
* Since, 2/11, ERCOT has installed additional audit/logging functionality so if this occurs again, ERCOT should be able to trace the origin of the unwanted revision.
* When asked how comfortable ERCOT was that this parameter would not inadvertently change again, they were not certain that it would not be repeated, however, ERCOT did feel comfortable they would be able to root-cause the issue if it did
* Remediation plan includes the following:
  + Market notice as soon as possible
  + ERCOT will provide a list of MTs impacted to REPs
  + The report would be accessible in MIS- GUI with a link provided in the market notice
* Dave Michelson will consider these impacts when reporting monthly IAG statistics to RMS. These MTs will be excluded from reporting.

**Next Meeting** – March 24th , 9:30– 3 , Center Point Energy , Houston, TX

**Proposed Agenda –**

1. SLO Results review with ERCOT and API Users (Oncor & CNP)
2. IAG Training-
   1. Confirmation of dates
   2. Survey Results
   3. Review of Agenda
3. Creation of one-page reference sheet of MT SubTypes
4. Review of User’s Guide updates
5. Suggestions for realignment of Retail 101 Training consistent with current RMG
6. Other Business