**MarkeTrak Task Force Meeting Notes**

March 24, 2015

CenterPoint Energy, Houston

**Attendees**:

Diana Rehfeldt TNMP Diana.rehfeldt@tnmp.com

Jim Lee AEP jim.lee@aep.com

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Kathy Scott CenterPoint Energy via WebEx

Lindsay Butterfield ERCOT via WebEx

Tammy Stewart ERCOT via WebEx

Tequila Rheams Constellation Energy via WebEx

Teresa Rodriguez Stream Energy via WebEx

Dave Pagliai ERCOT via WebEx

Raquel Bates Infinite Energy via WebEx

Susan Young Direct Energy via WebEx

Zahra Thurman Payless Power via WebEx

Tracy Johnson TXUE via WebEx

Veronica Bahcivanji ?? via WebEx

Cheryl Franklin AEP via WebEx

Dave Michelson ERCOT via WebEx

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

* Dave Pagliai of ERCOT indicated CenterPoint has provided ‘response time’ data to ERCOT for their review. Dave expressed ERCOT needed additional time review the results.
* **ACTION ITEM:** A follow up conference call with ERCOT and API Users is to occur prior to the next MTTF meeting to compare data of response times and expected results. Oncor indicated they will not have data to review, however, indicated they are not seeing any issues with current response times. CenterPoint, on the other hand, is looking to improve response times. The call will be to determine if the current metrics warrant adjustment.

**User’s Guide Updates**

Revisions were reviewed to the addition of the comments in the sections referencing allowing adequate time for transaction processing prior to submitting a MT for resolution. (Usage & billing, AMS/LSE , Other). Adequate time was defined as not less than 5 business days. ACTION ITEM: Tammy will post approved revisions under Key Documents.

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

Dave Pagliai of ERCOT reported they continue to work with their vendor to identify the root cause of the issue experienced repeatedly in February .

**RMS Inadvertent Training**

Dates have been confirmed for the IAG Training

* + - Austin- May 12, 2015 – Room 206
		- Houston- May 15, 2015 – CenterPoint Energy to host
		- Dallas- June 12, 2015 – Oncor to host

The team reviewed the ‘critical release’ deck that was presented back in 2012 as a guide to use in preparation of the deck for the upcoming training. The following suggestions were made by the team for the training:

* Tammy Stewart of ERCOT will be available on site for a MT “show and tell” if the system needed to be accessed
* Discussion of the issuance of MVOs by front line agents and IAG agents
* Current Occupant process when original tenant inadvertently gained by another CR is no longer at the premise in question
* MVO does not mean “cancel service”
* Navigation on how to find key documents: protocols, Retail Market Guide, User’s Guides
* Data Flow/ Workflow diagrams ACTION ITEM: Tomas and Sheri will create diagram
* Corde’s reconciliation checklist to identify potential pain points/ gaps in the process
* Show IAG statistics provided by Dave Michelson from 2012 and latest quarterly results as comparison and indication of progress
* Jim Lee will cover the rescission process along with RMGRR 129
* Broken IGLs whereby Gaining CR is left with time slice of consumption and “write offs”
* Reinforce “checkpoints” at the market challenge
* Encourage market participants to subscribe to listserves noting MTTF will remain even after sunsetting
* Encourage administrators to update rolodex for escalation issues – including a group mailbox in addition to individual agents
* What are the consequences for lack of compliance?
* Adding to the agenda a segment by Tammy Stewart on setting up customized reports from the MT tool
* Current issues and “what NOT to do” and offer alternatives
* Notification on a customer’s esi id an “IAG” situation is currently being worked to prevent unwanted transactions from occurring

Jim Lee has offered to compile the templates from the various segments and prepare the training deck for review on May 7th at the next MTTF meeting. ACTION ITEM: Jim has requested all templates be completed by presenters and forward to him by May 1st.

The team reviewed and edited the survey to be sent out via ERCOT Client Services soliciting information from market participants on expectations for the upcoming IA Training. The final survey questions will be as follows:

1. What would you most like to learn about at the RMS IA Training?
2. What specific scenarios or questions would you like included at the RMS Training?
3. Which RMS IA Training will you attend?
	1. Austin – May 12th
	2. Houston – May 15th
	3. Dallas – June 12th
4. Do you have any other comments, questions, or concerns regarding IA Training or other MarkeTrak issues?

ACTION ITEM: Carolyn will forward survey to Ted Hailu for distribution at the beginning of April with a due date of April 15th . This item will also be mentioned at the next RMS meeting on April 7th as a reminder to complete.

ACTION ITEM: Carolyn will also confer with Suzy Clifton to ensure the training dates are posted on the meetings page calendar at ERCOT and if necessary, copy Kathy Scott on her correspondence.

**TDTWG SCR Retail Test Environment Draft**

The task force reviewed the qualitative and quantitative benefits as well as any impact to market segments for the proposed creation of a retail test environment outside of the current certification testing environment. An additional benefit was presented as a utilizing as a training environment for MT and Retail 101 Training. It was noted, a testing certificate may be needed to access the testing environment. ACTION ITEM: Carolyn will send suggested revisions to TDTWG leadership for their review.

**Creation of one-page reference sheet of MarkeTrak SubTypes**

ACTION ITEM: Carolyn has offered to create this one page reference sheet by using the bulk insert template to list the SubType, what it is used for, and who would submit the issue. The task force will review at the next MTTF meeting.

**RMGRR Draft 7.8.2 – Overlapping of 810 Billing Dispute Process**

As a follow up from earlier MTTF discussions, the TDSPs had convened to propose revisions to the Retail Market Guide in section 7.8.2 Guidelines for Notification of Invoice Dispute to accurately depict how some disputes should be processed utilizing the MarkeTrak tool as currently practiced. Slight revisions were made to the proposed document. ACTION ITEM: Carolyn Reed will resend revisions to Lindsay Butterfield of ERCOT for “clean up” and distribution.



**Next Meeting** – May 7th , 10 – 3 , MET Center, Austin, TX

**Proposed Agenda –**

1. SLO Results review with ERCOT and API Users (Oncor & CNP)
2. IAG Training-
	1. Review of Training Deck
	2. Survey Results
3. Review of one-page reference sheet of MT SubTypes
4. Review of User’s Guide updates
5. RMGRR Draft – Overlapping of 810 Billing Dispute Process
6. Other Business