**Retail Market Training Task Force (RMTTF)**

Inaugural Meeting

April 15, 2015

ERCOT Met Center, Room 206

1:00 pm

**Attendee Company**

Debbie McKeever Oncor

Tomas Fernandez NRG

Sheri Wiegand TXUE

Taylor Woodruff Oncor

Kathy Scott CenterPoint Energy

Monica Jones NRG

Dave Michelson ERCOT

Bill Kettlewell ERCOT

Ted Hailu ERCOT

John Schatz TXUE

Kaci Jacobs TXUE

Carolyn Reed CenterPoint Energy

Jim Lee AEP

Kyle Patrick NRG

Eric Blakey Just Energy

Diana Rehfeldt TNMP via WebEx

Aida Valdez Calpine via WebEx

Paul Yockey ERCOT via WebEx

Rob Bevill NRG via WebEx

Tammy Stewart ERCOT via WebEx

Katherine Meiners ERCOT via WebEx

Isabelle Durham CenterPoint Energy via WebEx

Alex Esquivel Direct Energy via WebEx

Kara Haney Champion Energy via WebEx

Diana Coleman ? via WebEx

Edna Martinez ? via WebEx

**Scope of the RMTTF**

The team drafted the following scope statement to define the intent of the newly formed Retail Market Training Task Force (RMTTF) which will be presented to RMS for approval:

*The Retail Market Training Task Force, reporting to RMS, is responsible for coordinating the development and maintenance of retail market training materials for ERCOT market participants.*

Currrent state and future state were also drafted:

*Current state:*

*Existing Retail Market Training is insufficient to the needs of the retail market participants.*

*Future state:*

*Retail Market Training sufficiently meets the needs of the retail market participants.*

**Training Materials within scope for RMTTF**

The team reviewed a list of past and future training initiatives prepared by Kathy Scott of RMS as a starting point to discuss the needs of the retail market segment that fell within the scope of the new task force. The following initial topics were discussed:

* Retail Market 101 Training (New and Improved Edition) – the team briefly reviewed the training materials dated April 25, 2013 for ERCOT’s Retail Market 101 to determine what is valuable? What topics are desired to be covered? Create a generalized list of subject matter. Much reference was given to the training decks prepared for PUC Staff and OPUC office.
* Texas SET Transactions Training 101
* Texas SET Future Release(s)
	+ Standard Documentation/Template
	+ Objectives – what processes will change? What will be impacted?
* MarkeTrak 101 Training
* Inadvertent Gain Training
* MarkeTrak Future System Enhancements
	+ Standard Documentation/Template
	+ Objectives
* Smart Meter Texas 101 Training
* Smart Meter Texas 3rd Party Access and System Enhancements
	+ Standard Documentation/Template
	+ Objectives
* Current Market Processes
	+ Switch Holds- Payment and Tampering, Disconnect/Reconnect for non-payment, Tariff changes, etc.
	+ Retail Market Flight Testing
* New Market Processes
	+ Standard Documentation/Template
	+ Objectives

ACTION ITEM: Market participants are asked to review the above list and make any suggested revisions or additions. Market participants will also be asked next meeting to discuss if the above training would be most effective as instructor led or web based training. One suggestion was made to record any instructor level training and make available via the web training on a sectionalized basis. For example, if the MarkeTrak training were recorded, a market participant may need to review only the Administrative section of the training.

**Initial Prioritization**

It was discussed the task force’s initial efforts should be devoted to the redevelopment of the Retail Market 101 Training class by leveraging existing material. The goal is to have this training class prepared by Q3- 2015. It was suggested it be offered prior to flight testing, ideally, prior to the first flight in 2016. It was also duly noted by ERCOT, some newly certified REPs do not enroll a customer for a month or even a year after receiving certification.

**ERCOT’s Training Plans**

Bill Kettlewell of ERCOT’s Training Department shared ERCOT’s current plans for training in the retail space:

* Web-based version of Retail 101
	+ Bill would like to “trade notes” on material he has prepared and compare with the PUC Staff/OPUC training decks and let the task force decide what items are of significance. ACTION ITEM: Dave Michelson has offered to forward the PUC/OPUC deck to Bill for his review.
	+ ERCOT stated they could support an instructor –led version of the material and would build from the web-presentations
	+ Periodicity would still be under debate – how often the class would be offered
* MarkeTrak web-based training
	+ Participant would utilize the tool itself
	+ User’s Guide is serving as the framework for the training
		- Dave Michelson stated ERCOT has “started at the beginning” and plan to roll out installments by late summer 2015

Bill provided a quick demonstration of their Learning Management System and creating an account, registering for a class, setting up a custodian, course catalog, etc. It was later discovered a user may only register for one of the IGL Training Sessions offered. So, for example, a presenter, who plans to attend all three, will only be able to enroll for one class using this system.

ACTION ITEM: Next meeting, the task force, will need to be prepared to discuss the details in setting up training via the Learning Management System – does the custodian need to be an account holder? Who will be the custodian - ERCOT personnel?

**RMTTF ERCOT web-page**

Questions arose as to where all of the training materials would be stored and used a reference for market participants. It was discussed the RMTTF web page might serve as the repository for any training materials.

ACTION ITEM: Ted Hailu will assist with establishing an RMTTF web-page and listserve. Debbie McKeever will coordinate with Ted. Web-page and listserve will not be activated until RMS approves the scope of the task force.

**Next meeting**

The next meeting will be held the morning of **Wednesday, May 20th from 9:30 to 12:30** at the ERCOT Met Center. (As a note, this will be the morning prior to Day 1 of TxSET).