**MarkeTrak Task Force Meeting Notes**

May 7th , 2015

ERCOT Met Center, Austin

**Attendees**:

Tammy Stewart ERCOT tstewart@ercot.com

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Taylor Perry Tri-Eagle Energy via WebEx

Veronica Bahcivanji Just Energy via WebEx

Dave Michelson ERCOT via WebEx

Diana Rehfeldt TNMP via WebEx

Mary Sithihao Stream Energy via WebEx

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

* Dave Michelson of ERCOT reviewed the SLO metrics deck presented earlier at RMS and TDTWG. Dave indicated they saw more variability with the metric particularly API Queries and saw issues with the monitoring tool which produced “out of SLO” results. Despite the less than favorable results, ERCOT has not received any complaints from users.
* Dave reported on the follow up conference call with ERCOT and API Users to discuss the proposed new metrics and the response times API users are seeing. They have agreed to continue to monitor results through the end of July with another conference call to be scheduled at that time.

**User’s Guide Updates**

Tammy Stewart has posted all User Guide updates through 3/24/2015.

**RMGRR 131 – Overlapping of 810 Billing Dispute Process**

MTTF reviewed comments submitted by ERCOT and TXUE and revised comments for submittal by MTTF. The comments further clarified timelines and the escalation process for consistency between the two market- approved processes – MarkeTrak process and the formal email dispute process for TDSP invoice disputes.

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ACTION ITEM: User’s Guide may need to be revised to reflect RMGRR131 once approved. Action for TDTWG.

**RMGRR Draft – Clarification of Inadvertent Gain Process**

NRG presented a draft RMGRR proposing to strike the language in 7.3.2.4 (1)(c) Valid Reject/Unexecutable Reasons: “Losing CR has confirmed Customer’s intent to change REPs.” Market participants are encouraged to review the proposal . NRG may officially submit the RMGRR for market comments by May 18th to be reviewed at the June RMS meeting. Follow up on the proposed RMGRR will be handled via TDTWG.

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

Carolyn Reed presented the valuable reference sheet she created listing each MarkeTrak subtype, what it is used for, who would submit the issue, and the corresponding User Guide reference section. MTTF suggested a few “adds” such as a page break between D2D and DEV issues, revised formatting for transactions listed (e.g. 867\_02), inclusion of bulk inserts, administrative, and background reporting functions.

ACTION ITEM: The handy reference will be sent to the MTTF list serves and posted to the MarkeTrak Information page. Hard copies will also be provided for IAG Training participants.

**ERCOT MarkeTrak Web-based Training Modules**

Tammy Stewart reported ERCOT has developed the first three modules of the web-based MarkeTrak training. Once fully developed, the training will cover the following material: General overview of MarkeTrak, IAG workflows, switch holds, cancel w/ approval, other subtypes, reporting & administration functionalities, and DEVs. Tammy will continue to work with the Retail Market Training Task Force (RMTTF) for the rollout of the modules.

**RMS Inadvertent Training**

MTTF began reviewing the draft version of the training deck compiling each presenter’s material. Robust discussion continued for initial revisions. Additional review sessions were scheduled for Friday morning and Monday morning as a final review prior to posting the training materials.

Of note, due to the length of the material, several slides were moved to create an Appendix - available if necessary and will serve as a resource for participants. Such sections included detailed review of the rules and market guides, IAG workflows and customer rescission exceptions.

In the Market Challenge section, under ‘Reporting to measure success’, the task force decided to further review the details of the reporting proposed. Dave Michelson had proposed to utilize the same information he presents to RMS on the total volume and days to resolution metrics. Initially, to calculate the ratio of inadvertent gains to completed enrollments for the Gaining REP, it was proposed as follows:

IAGs + Rescissions

814\_01s + 814\_16s

Only the inadvertent gains that were valid and accepted would be included in the overall count. This will be reviewed at TDTWG as a follow up from the training.

ACTION ITEM: During the final dry run call on Monday, May 11th, it was decided to reconvene the group after the first training session to review any proposed revisions, improvements, or suggestions to the training.

**Next Meeting** – NONE – any future issues will be handled via TDTWG whose next meeting is scheduled for June 10th via WebEx 2:00 pm – 4:00 pm .