RMTTF Meeting Notes

Wednesday, July 08, 2015

ERCOT Met Center, Room 168

9:30 AM

Attendees:

In Person:

* Debbie McKeever Oncor
* Sheri Wiegand TXU
* Tomas Fernandez Reliant NRG
* Bill Kettlewell ERCOT
* Ted Hailu ERCOT
* Kyle Patrick Reliant NRG
* Monica Jones Reliant NRG
* Matt Tschetter ERCOT
* Eric Blakey Just Energy
* Carolyn Reed Centerpoint Energy
* Dave Michaelson ERCOT
* Jim Lee AEP

Phone or Web-Ex:

* Isabelle Durham Centerpoint
* Diana Reyfeldt TNMP
* John Schatz TXU

Tomas Fernandez, Co-Chair opened the meeting. Antitrust statement was read.

Tomas asked for introductions for each attendee (See above).

Meeting notes from the last RMTTF meeting were not posted in advance so those along with meeting notes from today will be taken up at the next meeting.

Tomas reminded everyone that the RMTTF webpage is now available and the listserve and requested everyone please sign up for the RMTTF listserve.

IAG Training Update

IAG Training completed for all 3 classes that ended on 6-12.

Numbers below are a combined total for all 3 classes

74 attendees from CRs

29 attendees from TDSPs

14 PUCT and ERCOT

36 CR companies

5 TDSPs

These numbers will be included in the RMS update from Marketrak TF. Will also be shared with Marketrak TF at their next meeting.

Survey was sent out for the IAG classes. Surveys will be provided at the MTTF meeting.

Retail 101

Bill Kettlewell provided an update from his outline for Retail 101. Bill noted it was created from the lengthy discussion at the last meeting.

Comments regarding Bill’s outline for Retail 101 are noted below.

Note! See document sent to RMTTF listtserve on 7-7-2015.

General Comments related to background:

Should Price to Beat be mentioned?

Should how Sharyland came into competition?

Road Map – what should the Road Map show related to Market history?

Non-Opt In Entities – should these be mentioned?

Market Rules

What should be mentioned?

 Where these should be mentioned?

How much info?

Demand Response

Should this be mentioned and where? Possibly include in info related to Smart Meters.

Market Structure/Market Design

Have a slide for current Market Design

Include the Governance structure that is on ercot.com

Basic definitions at a minimum should include:

* Premise
* ESI ID
* Meters and the types
* Smart Meter Technology

Acronyms

Make mention of section 2 of Protocols

Include as a handout as a training aid.

PUCT

Include a few statements regarding they are the top of the governance structure

PUCT mission

Power to Choose website.

Protocols

At a minimum include why protocols were created and the purpose they serve.

Include some specifics to section 10, 11, 15, 19, system ops, etc…

Market Guides

Point them to the guides as a source for additional information including:

RMG, COPS, Settlement Handbook, Marketrak User Guide, TX SET implementation guides, NAESB EDM Guide, Load Profiling Guide.

PUCT Substantive Rules

Should include all that are relevant

Note all that support the retail market

TX SET Transactions:

Include those through ERCOT and those point to point

See slides that were included in a past presentation to OPUC.

Could approach it from perspective of either those transactions sent to and through ERCOT and also those point to point.

Approach from process perspective.

Data Transparency and Availability

MIS, EMOL, Data extracts, etc…(see doc for full listing)

Possibly use data included in the ppt given to OPUC in the past.

Timing

Include a statement someplace for timing requirements.

Possibly include some with the PUCT slides (being developed by Eric)

Prerequisites:

 None currently

In the future after ERCOT 101 has been developed then that would be listed as a prerequisite.

Related Curriculum:

 Nodal 101

Load Serving entities 201

Additional items for curriculum:

ERCOT.com

Navigate through ercot.com

Comments for Rollout:

 August – history, rules, structure and players

 September – Operations and Processes

 October – Edit and complete initial draft

Goal is January 2016.

Volunteer Assignments for Retail 101:

Develop Slides for PUCT Rules – Eric Blakey

Bill to begin working on the framework for the ppt and identify areas where details are needed. At the next meeting he can come back with a list of what is needed. Volunteer assignments can be made as needed for each section.

Bill will notify the RMTTF Co-chairs when he becomes aware expertise is needed to fill in details and will do this as the need arises bc if he waited until the next meeting time would be wasted.

Online Training Modules

Matt Tschetter provided a quick update on the 3 modules available for input.

1. **Marketrak**

Comments:

Maybe include “what you need before you get started” and include that a Digital Certificate is needed in order to access Marketrak.

Make sure to include a Report Section as one of the Marketrak modules.

Include info about making your page and your favorites.

 Matt to add.

Make trainees aware that if they sign up for notifications they will get everything.

 Matt to add audio and pop up box to warn them.

On “Submit” take the user to what they would see showing the submit tree. Should see the Submit Tree with the Issue Types.

Matt to change the slide to reflect such.

 On “Favorites” add a favorite so they can see it. It will appear on the lefthand pane.

Comment made that the font is very small. Matt stated it is capable to expanding to the scale your browser allows.

Regarding Marketrak User Roles…”The USA may assign you one or more of the 5 Marketrak User roles”.

 Matt to add.

1. **IAG**

Add to the verbal statement where the RMG section is noted, please also add “customer name, service address, meter number or any other pertinent information”.

 Matt to add.

Make sure to include an overall comment about escalation emails being sent if the issue stays in the state of new for more than 3 days.

Matt to add.

“The Regain date can be date of loss plus one up to ten days……”

 Matt to add.

Colors should always stay the same for current and any future training…

 Green is gaining CR

 Red is losing CR

 Orange is TDSP

Add scenario where the losing CR needs more information.

Make sure to create two totally separate scenarios “disagree” verses “want more information”

 Matt to add.

On Losing CR slide “market approved reasons” for rejects…RMG exact section number needs to be included. Possible link to the valid/invalid reject reasons

 Matt to add.

Add info for invalid reject reasons. Note “cannot be marked unexecutable for just any reason”

 Matt to add.

Check point question should include something about the timing…”how long do you have?”

 Matt to add.

For the comment section “add the list of elements they need to put in the comment period”. 7.3.2

 Matt to add.

Populate the date as “date of loss plus one”.

 Matt to add.

Add “ready to receive” commentary

 Matt to add

Add a rescission example

 Matt to confer with Tammy and add

Maybe expand and not list just the acronyms such as “IAG”. Suggestion was to put all acronyms in the Glossary and also insert a slide higher in the training that includes for the trainees can find the definition for all acronyms on the “Glossary” tab.

1. Switch hold

Matt to note two types of switch holds may be applied

1. Tampering
2. Deferred Payment Plan

With either type of switch hold, essentially the same process and strict timelines apply

Suggested to reiterate “normal business hours” when highlighting time sensitivity

Matt will add note if issue is unresolved or additional documentation is requested, this is viewed as a new issue and time lines will reset

**Action Items for Next Meeting:**

Everyone to bring back to the next meeting what they would like to see for reports for the report section.

Matt will send out Cancel module scripting and has requested comments within a week so RMTTF may review final draft at the next RMTTF meeting 8/6/15

Matt will update the three modules covered as discussed above – General, IAG, and Switch hold. A market notice will be created indicating modules will now be available in ERCOT’s Learning Management System

**Next Meeting**

August 6th 9:30 to 4:00

ERCOT MET Center