**MarkeTrak Task Force Meeting Notes**

September 15th , 2015

ERCOT Met Center 2:30 – 4:00

**Attendees**:

Carolyn Reed CenterPoint Energy Carolyn.reed@centerpointenergy.com

Sheri Wiegand TXUE sheri.wiegand@txu.com

Kathy Scott CNP Kathy.scott@centerpointenergy.com

Tomas Fernandez NRG tomas.fernandez@nrg.com

Monica Jones NRG monica.jones@nrg.com

Jim Lee AEP jclee@aep.com

Debbie McKeever Oncor Deborah.mckeever@oncor.com

Taylor Woodruff Oncor taylor.woodruff@oncor.com

Lindsay Butterfield ERCOT lindsay.butterfield@ercot.com

**Via WebEx**

Diana Rehfeldt TNMP

Raquel Bates Infinite Energy

Tammy Stewart ERCOT

Cheryl Franklin AEP

Dave Michelson ERCOT

Jerretta Kirby TXUE

Tracy Johnson TXUE

Kenneth Tolbert TXUE

Teresa Rodriguez Stream Energy

**IAG Reporting**

Dave Michelson presented the latest version of the IAG reports designed to create awareness and visibility for all CRs’ performance in the IAG space. Dave and team worked with TXUE in developing this latest revision. Each CR will be represented on a single graph for their percentage of IAGs to the total number of applicable transactions sent for the reported month. A top bar graph will depict those CRs whose percentage is above 1%. The matrix below will tally the number of CRs who fell within the respective percentage buckets. The goal is to drive CRs to fall below 1%. 1% represents slightly below the market average percentage to serve as a goal. The TF agreed with the approach and it was decided ERCOT monthly reporting to RMS will continue until the end of 2015. At that time, it will be evaluated (under the purview of TDTMS) if the reporting will be effective on a quarterly basis. Tomas indicated if the values are presented on a quarterly basis, any anomalies would be normalized and if a CR’s percentage is high, then it is representative of consistent poor performance.

**New MarkeTrak API SLO metrics**

The API metrics were reviewed and again a sizeable increase was experienced on the API Query response time. ERCOT is still investigating the root cause. When asked if this has impacted API users, both CNP and Oncor indicated it had not. ERCOT will continue their investigation and provide an update to TDTMS.

**RMGRR 129 – Customer Rescission Timeline**

It was reminded RMGRR129 will become effective on 10/1/2015. Lindsay Butterfield indicated a market notice has gone out and the Retail Market Guide will be updated with the removal of the ‘grey-boxing’.

**NRG’s DRAFT RMGRR XXX – Clarification of Inadvertent Gain Valid Reject Reasons**

Monica and Tomas presented NRG’s proposal with TXUE comments. The TF discussed the proposed revisions regarding the 7.3.2.4 Valid Reject/Unexecutable Reasons (1) (c) and (d) :

7.3.2.4          Valid Reject/Unexecutable Reasons

(1)        The losing CR may reject the return of an inadvertently gained ESI ID from the gaining CR for one of the following reasons only:

(a)        A new transaction has completed in the market, including, but not limited to the following transactions:

(i)         The 814\_16, Move In Request; or

(ii)        The 814\_01, Switch Request.

(b)        Duplicate *Inadvertent Gaining* issue in MarkeTrak for the same Customer on the same ESI ID.

(c)           ~~Losing CR has confirmed Customer’s intent to change REPs.~~ The customer has entered into multiple, valid contracts for the same ESI ID(s) and the Losing CR has confirmed with the customer that the customer’s  REP of choice is not the Losing CR.

                (d)          The Losing CR has confirmed with the premise’s property management company that the Gaining CR’s customer is the tenant at the premise.

(2)        The gaining CR may reject returning an inadvertently gained ESI ID to the Losing CR for one of the following reasons only:

(a)        A new transaction has completed in the market, including, but not limited to the following transactions:

(i)         The 814\_16 transaction; or

(ii)        The 814\_01 transaction.

(b)        Duplicate *Inadvertent Losing* issue in MarkeTrak for the same Customer on the same ESI ID;

(c)        ~~Gaining CR has confirmed Customer’s intent to change REPs:~~  The Gaining CR has confirmed with the customer that the customer’s REP of choice is the Gaining CR

(i)         Gaining CR has a valid enrollment with the same Customer and provides the Customer name, service address and meter number (if available) in the comments section of the MarkeTrak issue.

(d)       Customer has successfully completed an enrollment regarding the same ESI ID and the Gaining CR has the most recent effective date; or

(e)        In cases of Customer rescission, *Inadvertent Losing* MarkeTrak issue is rejected/unexecuted and a *Rescission* MarkeTrak issue is created.

It was decided to remove (1) (c) and (d) from the losing CR’s options after extensive discussion that the losing CR has the authority to hold the occupant of the premise responsible. It was suggested a ‘current occupant’ process be followed when the situation arises where the losing CR’s customer indicate their REP of choice is not the losing CR. The losing CR would then inform the customer they have the right to select another provider.

The TF also agreed to make the changes in (2) (c) allowing the gaining CR to unexecute an IAL if they have contacted the customer and the customer indicates their REP of choice is the gaining CR.

The RMGRR will be up for a vote at the next RMS meeting in October.

**NEXT MEETING**

None scheduled at this time. Moving forward, these will be scheduled on an as needed basis.