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

November 5, 2015

ERCOT Met Center, Room 206

9:30 am – 3:00 pm

**Attendee Company**

Debbie McKeever Oncor

Tomas Fernandez NRG

Kathy Scott CenterPoint Energy

Monica Jones NRG

Carolyn Reed CenterPoint Energy

Matt Tschetter ERCOT

Bill Kettlewell ERCOT

Sheri Wiegand TXUE via WebEx

Jim Lee AEP via WebEx

Ted Hailu ERCOT via WebEx

Zahra Thurman Payless Power via WebEx

Rebecca ? via WebEx

Minutes from 10/1/15 meeting were approved as submitted.

Review of IAG MarkeTrak on-line training module

* Discussion of IAG definition on slide 1 – decided to add ‘esi id (premise)’
* Valid reject reasons slide – questions were raised regarding the drop down selections which prompted discussion regarding RMGRR 133. RMGRR 133 indicated a ‘no impact’ Impact Analysis, however, it was suggested the menu be revised to reflect the current/proposed language. This issue will be handled off-line with ERCOT and MTTF. For the purpose of the training, the pop-up will reference and link the appropriate section of the RMG.
* Rescission slides with initial bullet definition and clarification
  + #1 – good
  + #2 – changed
  + #3 – correction on punctuation and added 814\_01
  + #4 – cancel switch - script is good
  + #5 – reference 25 days
* DUNS should be all caps
* Add rescission section 7.3.5 with the pop up
* Voice over PC means ‘pending complete’
* Drop down on unexecutable reasons – same issue as earlier with IAG unexecutable reasons
* Adding a pop-up on unexecutable reasons section in RMGRR
* Redirect fee slide – include ‘possibly’ before ‘including another agreement’

Matt stated the IAG modifications should be ready by Wednesday, November 11th. These will be submitted to Co-Chairs for review. It will then be decided if this will be released to LMS and market participants.

Review of Retail Market 101 Training Deliverables

With the end goal to provide instructor led training in association with the first flight test of 2016, key dates were discussed.

* 1/13/16 deadline to enroll for flight testing
* 2/9/16 First flight test of 2016

In consideration of the progress made to date, RMTTF concluded, an early February instructor led training class was the most feasible. The TF in conjunction with Bill’s schedule, proposed the following agenda to meet the deadline:

* December meeting – 2 day meeting –
  + Day 1 - review updates to sections *Intro* and *Transactions*
  + Day 2 – review sections *Smart Meter* and *History*
* January meeting – 2 day meeting (if necessary) – review *Market Rules* and *Transparency*
* January WebEx calls (if necessary) – review entire Retail 101 Training deck

The TF opined Retail Market Training 101 will be revised as needed, similar to the IAG Training Roadshow, where slides were modified based on participant feedback.

Learning Management System (LMS) tool

Matt reported the new interface for the LMS tool will be implemented in the summer of 2016. At that time the “RTL” dropdown will be extended to display the Retail Market on line modules available. Matt also indicated direct links to the LMS are functioning and may be displayed on the RMTTF web page to improve the process.

Retail Market Training 101 review

The deck was reviewed with the following suggested revisions:

Slide 17- new color on the Oversight arrows

Slide 25 – adding a meter picture and bullet “maintain reliable transmission and distribution system”

Slide 26 - correct the crooked arrow

Slide 28 – relocate Oncor/SESCO lines to display below Oncor line

The decks for *Retail Transactions* and *Intro/Roles/Responsibilities* will be distributed to the RMTTF list serve by the end of next week (11/13/15) soliciting comments to the Co-Chairs by November 25th. These comments will be reviewed at the December meeting.

Next Meeting

Two day meeting:

**December 2nd** 1:00 – 4:30 pm @ ERCOT Met Center

**December 3rd** 9:30 am – 3:00 pm @ ERCOT Met Center

Goal is to post the two sections of Retail Market 101 by EOD Monday, November 30th