RMTTF Meeting

Wednesday, April 06, 2016

9:30 AM to 4:00 PM

ERCOT Met Center, Room 168

**Attending In Person**

Tammy Stewart ERCOT

Patrick Coon ERCOT

Eileen Weaver ERCOT

David Hanks ERCOT

Tomas Fernandez NRG

Monica Jones NRG

Carolyn Reed Centerpoint

Sarah Hesselmeyer ERCOT

Sheri Wiegand TXU

Brett Hunsucker ERCOT

Kathy Scott Centerpoint

Debbie McKeever Oncor

Jim Lee AEP

Lindsay Butterfield ERCOT

Matt Tschetter ERCOT

**Attending via Web-ex**

Cheryl Franklyn AEP

Diana Rehfeldt TNMP

Laura Arriaga AP Gas and Electrical

Ted Hailu ERCOT

Tomas Fernandez, co-Chair led the meeting.

**Meeting Notes**

Meeting notes from last month – No changes or comments were received. Meeting notes are considered final.

**Retail 101 Training**

Training is to be held on May 5th at TXU 200 W. Carpenter Frwy. Irving, TX

9:00 AM to 4:30 PM

Current count - 14 in person, 8 for web-ex

**ERCOT Action Item:**

An additional Market notice will go out for Retail 101 and include May and September.

Also send the first notice for Marketrak TF.

May need to send another notice later in April too.

Notice should be sent to: RMS, RMTTF, TX SET and TDTMS

**Presenters for Retail 101**

Bill has been reassigned and Brett will take his place in presenting his sections for Retail 101.

Program/Agenda

Brett will open

Brett will introduce Kathy Scott, Chair of RMS

Kathy will say a few words

Module 1 – History – Eileen

Module 2 – Roles and Responsibilities – Tomas and Brett

Module 3 – Market Rules – Lindsey and Jim

Module 4 – Transaction Processing – Sarah and James

Module 5 – AMS – Jim and Sheri

Module 6 – Data Transparency – Brett and Debbie

Jeopardy game and closing – Brett

None of the answers will be printed in the presentation.

**Instructor Notes**

It was decided that Instructor notes are not needed at this time.

We will get with Matt when the modules are developed for Retail 101.

Instructor notes may be documented and included in the development of the module(s).

**Retail 101 ppt.**

Went through the changes and there were no additions.

The ppt is posted on the meeting page for todays meeting.

It is not posted on the training page at this time.

**Action Item for ERCOT:**

ERCOT to print the books for Retail 101 and Marketrak training.

Note: Please have 10 more printed than the number that RSVPS.

**Quiz Questions in Retail 101**

The Quiz questions were reviewed and modified as needed.

For slides that have 2 questions, Matt will change and put one on each slide.

Matt will change the slides that have “quiz” and use “checkpoint question”.

Retail 101 CHANGES WERE REVIEWED.

All changes were agreed.

At this time except for Matt’s changes, the Retail 101 ppt is considered final and will not be changed again.

In addition to the Marketrak presenters, the new Presenters that did not present at the Feb 9th training (Eileen and Brett) will be asked to attend the Dry Run on April 19th and present their sections of Retail 101.

All Marketrak presenters will be asked to attend April 19th in person and be prepared to present as if they were actually giving the training to a class.

The dry run could take all day.

**Marketrak Presentation for May 6th at TXU:**

Sheri noted that the training is taking place at the Customer Operations Facility and NOT at their headquarters.

Since TXU is hosting Sheri said she will give the welcome and provide logistics, note sign in sheet and lunch.

ERCOT to provide list of attendees in advance so TXU security will be aware.

Need sign in sheet for each day.

See below for exact presentations section in order with presenter.

**Agenda/MARKETRAK PPT SECTION PRESENTER COMMENTS**

What is MarkeTrak? DEBBIE COMPLETE

General MarkeTrak Navigation DAVE with ERCOT COMPLETE

Bulk Inserts MONICA Monica to finish by 4-11

 \*MONICA TO HAND OUT TIPS DOC MONICA Monica to finish by 4-11

Quick Reference Subtypes document CAROLYN COMPLETE

 \*DEBBIE TO ACTUALLY HAND OUT SHEET DEBBIE COMPLETE

Day to Day Subtypes SHERI COMPLETE

Usage & Billing SHERI COMPLETE

All subtypes – Usage & Billing, AMS LSE SHERI COMPLETE

Switch Hold Removal JIM COMPLETE

Inadvertent Gains TOMAS Tomas to finish by 4-8

Customer Rescission TOMAS Tomas to finish by 4-8

Cancel w/Approval MARTY ALLEN COMPLETE

Other MONICA COMPLETE

Missing Transactions MONICA COMPLETE

Reject Transactions MONICA COMPLETE

Service Address MONICA COMPLETE

Premise Type MONICA COMPLETE

Projects MONICA COMPLETE

Market Rule SHERI COMPLETE

REP of Record SHERI COMPLETE

Siebel Change SHERI COMPLETE

997 issues SHERI COMPLETE

Service Order 650 SHERI COMPLETE

Safety Net Order JIM COMPLETE

Move Out with Meter Removal JIM COMPLETE

Data Extract Variances (DEVs) CAROLYN COMPLETE

Administration Workflows DAVE COMPLETE

Reporting DAVE COMPLETE

Email Notifications DAVE COMPLETE

Listserves DAVE COMPLETE

Background Reports DAVE COMPLETE

Marketrak Demo will be given – probably by Dave

Closing Comments SHERI

All presenters should plan to attend the dry run for Marketrak on 4-19 at the Met center.

Brett and Eileen will be invited to attend and go through their sections of Retail 101. They will go first prior to starting the Marketrak dry run.

Action Item – Tomas to email Brett and Eileen.

**Review of the Day to Day Script for the next online Marketrak Module**

**Matt Tschetter leading…**

Script was reviewed and modifications made. Matt will have the module to review at the end of April…no later than 7 days before the next RMTTF meeting.

Next RMTTF meeting – tentatively scheduled for May 17th at ERCOT.

Action item for Debbie

Deb to secure room and webex for next RMTTF meeting on the 17th.

Send out notice.

**Action item for TDSPs for Retail 101 and Marketrak Training:**

Provide index cards for those attending training at both Retail 101 and Marketrak training at TXU in May.

Look for the Day to Day subtype to be posted at the latest on 5-10th

Reminder…

4-11 – all remaining slides due to Matt

4-19 – dry run for Marketrak 101

4-19 – dry run for two new retail 101 presenters

5-5 – retail 101 in Irving

5-6 – MarkeTrak

5-17 – next RMTTF and will review online module and provide final comments with goal to send out the module on May 24th, 25th.

RMTTF May meeting

Agenda items

* Review Day to Day module
* Next Marketrak script – possibly Bulk insert maybe Dave can start reviewing the script.
* Dave to bring list of modules that can be accomplished – he has reordered the list.
* Schedule the Austin Marketrak instructor led class

**June meeting**

Survey info from 5-5 and 5-6 classes will be reviewed.

Suggested date for Marketrak class in Austin – possibly November 8th

Kathy to email Patrick and co-chairs.

Meeting adjourned at 3:53.