RMTTF Meeting Notes

Tuesday, May 17

9:30 AM to 2:30 PM

ERCOT Met Center

Room #102

**ATTENDEES**:

Sheri Wiegand TXUE

Kathy Scott CNP

Debbie McKeever Oncor

Patrick Coon ERCOT

Matt Tschetter ERCOT

Jim Lee AEP

Monica Jones NRG

Tomas Fernandez NRG via WebEx

Carolyn Reed CNP via WebEx

Tammy Stewart ERCOT via WebEx

Cheryl Franklin AEP via WebEx

Becky Taylor CNP via WebEx

Diana Rehfehldt TNMP via WebEx

**Antitrust Admonition & Review Meeting Agenda**

Read by Debbie McKeever

**Review and Approve Meeting notes from April 6th meeting**

 Approved as posted

**Current statistics for training provided on ERCOT LMS**

* Matt presented the current statistics showing a total of 403 viewers (last month ~ 250).
* As a note, when reviewing the stats, the number following the type of market participant (QSE, LSE, etc) in the banner is indicative of placement on the dropdown when learners are creating their profile in LMS
* It was suggested approximate “run times” for each of the modules be added to the catalogue. ACTION ITEM : Matt will research this if this may be added.

**Review “Day to Day” Module**

Suggested modifications

* + Title page – add D2D in parenthesis
	+ Matt will adjust the volumes on ‘definition’ screens to match the ‘scenario’ screens
	+ Reject Transactions – add the word transaction after TXN
	+ Changing *auto-close* statement throughout D2D module – “the submitter should close the issue upon resolution, or if left in the Pending Complete state, it will auto-close in 14 calendar days”. This will be added to the end of each section and will be a pop-up box.
	+ Projects-
		- add pop up about the Withdraw option – stating it can only be utilized as long as the Assignee has not selected Begin Working.
		- Aslo, perform an audio fix
	+ Siebel CHG/Info to Siebel Change/Info- reordering sub-bullets where the last two become the first two and on the ‘start time’, swap the bullets – actions before questions.
	+ 997 –
		- “because Begin Working has already been selected”, the issue can no longer be withdrawn
		- - adding “functional acknowledgement” between 997 and transactions
	+ Other –
		- change Texas Set to Texas SET-
		- the last bullet should be the very first bullet and add verbiage “due to system validations under that subtype”---
		- new slide for completion .
		- SET
		- checkpoint question “which of the following **two** should…”
	+ ERCOT Initiated – add graphics – possibly a yellow pop up between bullets when discussing examples
	+ Safety Net Order –
		- flip bullets 2 & 3 and change language,
		- on checkpoint question, put True first
	+ Service Order 650 –
		- changing ‘executing’ to ‘selecting’.
		- “Comments are required for this particular subtype and should contain as much detailed information as possible.”
	+ Move Out with Meter Removal – adding pop up with Tran ID field that it should be the Tran ID of the 650\_04
	+ Premise Type-
		- third bullet will say “used for out of sync premise type conditions only”,
		- fourth bullet should say “NOT to be used to request a rate change or a premise investigation”
		- next bullet “ premise investigations should be submitted as service orders”,
		- Comments entered should be corrected to read “please submit 814\_20 confirming residential premise type” and response comment will say “premise confirmed residential and 814\_20 is sent”
		- checkpoint question- should say “650\_01 service order transaction” in question and response and change the order of true/false
	+ Market Rule –
		- “may be used…”,
		- add fourth bullet on definition page “in absence…”,
		- change MP audio to market participants –
		- redo the scenario to reflect how it is currently operating today – ACTION ITEM: Sheri will draft language for script based on MT 101 deck

**GOAL**:

 May 18 – Sheri to provide suggested script for D2D

May 20 – all revisions completed by Matt for D2D module

* Matt to send to Co-chairs for final approval

May 24 – Co-chairs respond to Matt with revisions/approval

May 25 – module is released to the market via market notice by ERCOT

**Other MarkeTrak On line modules notes**

* On the IAS and Usage/Billing modules, tabs are present however the script is not showing
* On the other three modules, only one tab is showing – ‘Menu’– no glossary or script tab
* ACTION ITEM: Matt had committed to making the revisions

**Review script for Bulk Insert**

* The team revised the Bulk Insert script.
* The revisions will be forward to Sheri who will include in the meeting notes and distribute to RMTTF by Thursday, May 19th.
* ACTION ITEM: All final comments should be returned to co-chairs by May 26th.
* Matt will prepare module for review at the next RMTTF on Thursday, June 9th.
* We will finalize revisions at the 6/9 meeting with a goal of releasing by the end of June.



**MarkeTrak On line Modules planning**

In keeping with RMTTF’s current cadence, the goal is to start reviewing a script of the next module to develop. ACTION ITEM: Matt will check with Tammy on which script would be the quickest and easiest to have prepared by June 9th. The following are planned…

* + **MarkeTrak Module 06 - Other D2D Subtypes**
	+ **MarkeTrak Module 07 - Bulk Insert**
	+ **MarkeTrak Module 08 - GUI Reporting**
	+ **MarkeTrak Module 09 - DEV LSE Subtypes**
	+ **MarkeTrak Module 10 - DEV Non-LSE Subtypes**
	+ **MarkeTrak Module 11 - Emails and Notifications**
	+ **MarkeTrak Module 12 - Background Reporting**
	+ **MarkeTrak Module 13 - Admin Functionality**

FOLLOW UP – Matt informed the co-chairs Tammy will be able to have the Admin Functionality scripting available for the next meeting.

**Survey Results and brief discussion regarding Training held May 5, 6 at TXU**

* + Try not to have class on Friday or Monday
	+ Remind the presenters to repeat the questions for those in the room and on the WebEx

**Upcoming meetings at ERCOT Met Center**

June 9 – review Bulk Insert module

 Review next script from Tammy

July 12 – review Tammy’s module

 Start review of scripting - possibly DEVs

 Discuss training in Houston – logistics

1111 Louisiana Room 1360

 Day 1- 9am -4pm

 Day 2- 9am -4pm

 Room will be set up for 60

Meeting was adjourned ~2:30 pm