**RMTTF Meeting**

November 3, 2016

9:30 AM

ERCOT Met Center

Room 102

Debbie McKeever, co-Chair of RMTTF chaired the meeting and read the antitrust statement.

Attending in Person

Carolyn Reed, Centerpoint

Debbie McKeever, Oncor

Marty Allen, Oncor

Matt Tschetter, ERCOT

Sheri Wiegand, TXU

Kathy Scott, Centerpoint

Monsherra Odanga, Oncor

Tomas Fernandez, NRG

Jim Lee, AEP

Attending via Call

Cheryl Franklin, AEP

Diana Rehfeldt, TNMP

Patrick Coon, ERCOT

Ted Hailu, ERCOT

Tammy Stewart, ERCOT

Teresa Rodriguez, Stream Energy

Meeting notes from October 6th meeting were approved as submitted.

**DEV LSE on line module review**

The following revisions were suggested:

* On the first workflow, provide a pop up showing definitions and add audio
* In closing the issue, replace “has the option” with “should”
* On a few of the workflows, audio needs to be added to include “ERCOT should not be entered as the Assignee”
* Screenshots will have more current dates photo shopped in
* Matt will remove his name as the Submitter on screen shots
* Adding a box around “failed analysis” and “Analysis Information”
* Suggested to embed URL for quick access to helpful links
* For all of the necessary workflows, required fields found from the 727 extract will be highlighted with audio adding “the highlighted fields may all be found in the 727 extract”
* Comments will be added in the blank “comments” field – Matt will get these from Tammy
* Use the same checkpoint questions found in MarkeTrak 101 training and a suggested question was “Where may ADDTIME, STARTIME, and STOPTIME fields be obtained?”

Module is ~35 minutes. Matt plans to add text at the beginning of the module and make necessary corrections by the end of November.

**DEV Non-LSE on line module review**

The following revisions were suggested:

* For any fields where the information is found on the 727 extract, Matt will highlight fields and add audio “the following highlighted fields may all be found in the 727 extract” for the appropriate workflows
* As subtypes are read from the submit tree screen shot, a box will be added around those subtypes
* Screen shots that indicate “no preferred projects” at the top of the screen will be photo-shopped out
* For the grouping Non-LSE DEV Existence, a statement will be added at the introduction “This subtype can only be submitted by a TDSP.”
* For an ‘un-retire ESI ID’, the parenthetical (814\_20) will be added after the statement “the TDSP must send the appropriate characteristic changes(814\_20)…”
* For ‘in MP System not ERCOT’,
  + at the end of 2.(c) activity report, the parenthetical will be added ‘(867\_03 IDR/NIDR reports)’
  + revising the statement “These validations are performed whether the data is submitted via 867\_03 transaction, ~~AMS LSE file~~, or file for manual loading.
* For ‘in ERCOT system not MP’, revise LSE of record to say REP of record
* In references for LSE file, revise to data file in next two sections
* Where NEW TOTAL is a required field, provide the explain “ which is the new kWh total”
* The working group felt the next series of DEV Non-IDR Usage workflows were very similar to the DEV IDR Usage workflows and would add significant length and not value to the module. It was decided at the beginning of this section, a statement would be added to reflect the decision and only present one of the workflows which would involve the two “new” required fields of METER TYPE and TIMESTAMP
* Tammy will be consulted for the check point questions on this section as well

Matt plans to add text at the beginning of the module and make necessary corrections by the end of November.

**ILT Training – September in Houston**

Kathy Scott asked about dates for the Retail 101 & IAG Training to be hosted by CNP in Houston in September. It was decided Tuesday & Wednesday, Sept 26th and 27th would work the best. Kathy will confirm CNP room availability.

**On line MT Training #s**

Matt pulled the LMS #s. As of this morning, there were 553 visits.

**Next meeting**

The meeting date was changed to Tuesday, December 6th from 9:30 – 3:30

**Meeting Dates & Tentative Plans for end of 2016 & into 2017**

*December 6, 2016*

* Finalize DEV modules if necessary
* Review any revisions to MT & Retail 101 decks
  + Data section
* Review Email on line MT script
* Outline Reporting on line modules
  + Background Reports
  + GUI Reporting
* Plans for 2017

*January 12, 2017*

* Review of Retail 101 – web based training
* Review Email on line module
* Review Reporting 1 script

*January 31st & February 1st* – RETAIL 101 & MarkeTrak 101 Training Austin

*February 2, 2017*

* Review IAG deck / plan outline for modifications
* Review Reporting 1 on line module
* Review Reporting 2 on line script

*March 2, 2017*

* Review IAG deck
* Review Reporting 2 on line module

*April 6, 2017* – meeting to be hosted by Oncor in Dallas

* Dry run for IAG presentation
* Finalize any revisions to IAG deck

*May 3rd & 4th –* RETAIL 101 & IAG Training

*June 8, 2017*

*July 13, 2017*

*August 3, 2017*

*September 7, 2017*

*September 26th & 27th* – RETAIL 101 & IAG Training

**October 5, 2017**

*November 2, 2017*

*December 7, 2017*

**2016 Accomplishments**

1. Collaborated effort with market participants and ERCOT to complete development of a new Retail 101 Training deck
2. Conducted three Instructor led training sessions for Retail 101 in Austin, Dallas, and Houston areas.
   1. Held “dry run” sessions for presenters
   2. Reviewed feedback from each session
   3. Revised presentation/materials based on feedback received
3. Modified an earlier MarkeTrak training deck and conducted two Instructor led training sessions for MarkeTrak 101 in Dallas and Houston areas.
4. Developed and released six Online MarkeTrak Training Modules:
   1. Usage & Billing
   2. Day to Day Subtypes
   3. Bulk Inserts
   4. Administrative Functionality
   5. DEV LSE
   6. DEV Non-LSE

**2017 Goals**

1. Continue collaborative effort to complete the MarkeTrak Online Training Module series with the development and release of the final three modules:
   1. Email Notifications
   2. Background Reporting
   3. GUI Reporting
2. Review the Retail 101 Online Training Module developed from earlier Instructor led training sessions
3. Conduct three additional Retail 101 Training sessions with one to be held in Austin (February), Dallas (May), Houston (September)
4. Collaborative effort to revise/update an earlier Inadvertent Gain Training deck and conduct two Instructor led training/workshops in Dallas (May) and Houston (September).
5. Continue to support the retail market’s training needs
   1. Earlier interest was expressed for a TxSET Transactions training/module
6. Support ERCOT’s enhancements of the ERCOT Learning Management System (LMS)
7. Provide input and support for ERCOT’s market notifications and communications on training efforts

Meeting was adjourned and 2017 goals will be reviewed again at the December meeting.