**RMTTF Meeting**

January 12, 2017

9:30 AM

ERCOT Met Center

Room 102

Tomas Fernandez, co-Chair of RMTTF chaired the meeting and read the antitrust statement.

Attending in Person

Carolyn Reed, Centerpoint

Marty Allen, Oncor

Matt Tschetter, ERCOT

Sheri Wiegand, TXU

Kathy Scott, Centerpoint

Monsherra Odanga, Oncor

Tomas Fernandez, NRG

Jim Lee, AEP

Lisa Sumruld, ERCOT

Ted Hailu, ERCOT

Attending via Call

Debbie McKeever, Oncor

Cheryl Franklin, AEP

Diana Rehfeldt, TNMP

Patrick Coon, ERCOT

Tammy Stewart, ERCOT

Teresa Rodriguez, Stream Energy

Meeting notes from December 6th meeting were approved with minor revisions. Revised copy will be posted.

**January Austin Training**

To date, the following have enrolled:

 Classroom WebEx

Retail 101 11 11

MarkeTrak 6 1

There was some discussion regarding the possible cancelling of class due to the low enrollment. The task force looked to ERCOT on guidance of any thresholds in cancelling. Per Ted, ERCOT does not like to cancel any classes and enrollment is considered a “lessons learned” in the planning of next classes. It is anticipated enrollment will increase.

ACTION:

ERCOT will send another market notification regarding the training. Sheri will send a similar note to last training session to various listserves.

Presenters for January training:

**RETAIL 101**

Opening Kathy Scott/ Lisa ERCOT

Module 1 Eileen

Module 2 Lisa ERCOT/ Tomas

Module 3 Eileen

Module 4 Sarah ERCOT

Module 5 Sheri

Module 6 Lisa ERCOT

Both Debbie McKeever and Jim Lee will not be able to attend the training. Sheri and Eileen are covering Jim’s sections (AMS Data and Market Rules, respectively). Lisa will present Debbie’s MarkeTrak piece.

**MARKETRAK 101**

* Agenda will remain the same as Houston MT training with ERCOT presenting at the beginning.
* It was confirmed Dave Michelson will be ERCOT’s only presenter covering Email, ListServe, Administration, General Navigation, and concluding with the demo on Reporting.
* Marty Allen, Oncor will cover Jim Lee’s sections on Switch Holds and Jim’s Other Day to Day subtypes
* Monica will cover Debbie’s opening of the MarkeTrak class.

**MT On line Training Modules**

EMAIL Notifications

The team reviewed the module for Emails and Notifications. The following suggested revisions were discussed:

* Large red arrows pointing to the email icon box, exclamation icon box, etc for better visibility
* Further display “find name” functionality with additional screen shots
* For escalations, show names owner and Primary & Secondary contacts
* On slide 4 of 8, after the 4 bullets, show a pop up discussing “emails will continue to be received until the MT issue is transitioned or resolved”
* After the two types of notification requests “Pending Complete” and “Pending Complete-Unexecutable”, add a pop up indicating submitter should review and close the MT
* Remove the ‘testing ercot’ banner reference
* Slide 6- bring the pop up a bit earlier
* Tammy will walk Matt through a ‘Manage Data’ example for screen shots – not voice over, just text
* Add a multiple choice checkpoint question as discussed

Plan is for Matt to complete the revisions the week of the 23rd. Announce and launch the module at the January training.

REPORTING Module

Given the MT updgrade scheduled for March 2017, it was decided to wait for the development of the Reporting Module(s) until functionality was known and screen shots were available. The following is planned:

* February – discuss outline with Tammy’s input on possible new reporting features
* March – review Reporting Script
* June – review Reporting module

**Dry Runs of Retail 101**

Lisa Sumruld practiced presenting Section 2 – roles of market participants and Eileen Weaver practiced Section 3 – market rules.

Housekeeping for Training

* Booklets and corrected transaction cards will be provided by ERCOT
* MT Quick Reference Guide provided by Carolyn
* Bulk Insert cards provided by NRG
* Dave Michelson will be the only ERCOT presenter for MarkeTrak 101 for the Austin training
* Matt will be updating the graphics on a couple of the slides and will date for January training
* Run times will be added to Retail 101 on line training 24 x 7 – for each section
* The task force reviewed Module 2 – Roles of Market Participants and Module 4 – Transactions of the on line Retail 101 24x7 training
	+ Audio had cut out on common transactions section – Matt will correct
	+ Overall, the training was very impressive!!! Nice work Matt!
	+ It was encouraged for folks who delivered the training to review their appropriate section for suggested revisions (content and delivery)

**Proposed Agenda for 2/2/17**

1. MT #s reporting
2. Review of feedback from Jan – Feb training
3. Outline the Reporting MT on line module
4. Review IAS deck from earlier training