RMTTF MEETING

Thursday, August 3, 2017

9:30 AM

ERCOT Met Center – room 102

Meeting Notes

Fernandez, Co-Chair of RMTTF opened the meeting.

Antitrust Admonition was read by Tomas. No questions were asked.

Attending:

In person:

* Tomas Fernandez NRG
* Sheri Wiegand TXU
* Debbie McKeever ONCOR
* Carolyn Reed Centerpoint
* Kathy Scott Centerpoint
* Ted Hailu ERCOT
* Jim Lee AEP
* Marty Allen ONCOR
* Art Deller ERCOT
* Monica Jones NRG

Via phone:

* Diana Rehfeldt TNMP
* Matt Tschetter ERCOT

Ted Hailu introduced Art and RMTTF gave him a warm welcome.

 Art Deller who is the new Market Training Manager at ERCOT and will be attending RMTTF.

Meeting notes from last meeting: No changes were needed.

Art had sent out the **statistics** for the ERCOT LMS. Progress was noted. 680 viewers total. No questions were asked.

Review of **action items from last month**’s meeting:

Reminder! All RMTTF instructor-led class presenters should please send an email to Matt Tschetter and indicate which classes you have taken so you can receive credit. Presenters are not required to register for instructor-led classes.

Matt led us through the changes of the **Reporting Module** for Marketrak. Changes noted from past meetings were reviewed and agreed.

All those in attendance were in agreement that the changes meet the expectations of what was discussed.

Receiving a **completion certificate** in the LMS: functionality activated to receive certificate on a go-forward basis for each module completed. Tomas brought up that those that have taken an online module should receive an certificate.

Presenters for the Instructor led training in **September.**

One change for ERCOT presenters; Lisa will take James place so the ERCOT presenters will be; Sarah, Eileen and Lisa Sumerole.

**Retail 101** Modules and Presenters

* Welcome Kathy Scott
* Course Intro Eileen
* Module 1 Eileen
* Module 2 Lisa
* Module 3 Eileen
* Module 4 Sarah
* Module 5 Jim and Sheri
* Module 6 Lisa and Debbie
* Jeopardy Game Lisa

Color slides – Art to take care of getting the “appendix slides” in color:

43, 115, 177, 178, 179, 180, 181

**Registered Participants** for the Instructor led training:

Retail 101: 15 live and 14 web-ex

IAG: 15 live and 4 web-ex

ERCOT will send out another **Market notice** mid-August.

RMS is September 12 – Sheri will send the reminder on September 11.

RMTTF will make a verbal reminder at RMS.

**IAG Presenters**

* Welcome Kathy Scott
* Introductions Kathy Scott
* Overview Tomas
* Rescission Jim
* IAG Walkthrough and Best Practices Tomas
* Reconciliation Synetrick
* Demo Dave, Carolyn and Monica
* Reporting and Challenge Sheri Wiegand
* Wrap Up Tomas

For the Instructor-led **classes in Houston** on September 26, 27, need two laptops:

Jim run the web-ex for IAG and monitor the “chat”

Centerpoint will be the “host” for IAG

ERCOT will be the “host” for Retail 101

Review of the **older MT modules** to make certain they are still current:

Comments for the Marketrak **Overview** Module:

* Script tab needs to be enabled
* Volume too low
* Logo needs to be updated to the new logo
* New screen shots needed
* In Navigation Pane section– highlight the text green as Kim reads through
* Pop up with different “states”
* Include a slide with the available MarkeTrak modules on the ERCOT LMS.

Matt will make a best attempt to complete the changes needed to the Marketrak Overview by the September RMTTF meeting.

As they are updated, the screens will be widened by Matt, like the new Reporting Module.

Possibly move the date of **RMTTF to September 21st**. AMWG may be cancelled. If so RMTTF will use the room currently reserved for AMWG.

Sheri to check with John and Kathy to check with Ester on the status of the meeting.

**Cancel with Approval Module – Comments:**

A new slide will be developed prior to the introduction slide.

Slide numbers will be added by Matt.

Script wording for Kim…Note! This will be for a new slide prior to the existing Introduction slide.

“The Cancel with Approval MarkeTrak subtype shall only be used as an alternative to cancel the following transactions in the event that an 814\_08 cancel request cannot be sent due to system failure.

Switch Request (814\_01)

Move In request (814\_16)

Move out request (814\_24

Under no other circumstances should the Cancel with Approval process be used to bypass approved rules, protocols, guides or other market approved processes. “

This statement should be made by Kim after the introduction slide Add this to the script at the beginning of Instruction Slide:” In the rare instance that a Cancel with Approval Marketrak Subtype is need”, - then proceed with the existing Introduction slide.

ACTION ITEM: Determine what needs to be removed or modified for all statements about ERCOT Validations and pop ups…(see cancel with approval on the left of the screen)

Keep the red text pop up which occurs after the yellow box for “ERCOT Validations” occurs on the Requesting Competitive Retailer View.

ACTION ITEM: TDTMS should verify if the logic in the Marketrak system is being changed to align with the new process for the validation window. Also the Marketrak user guide needs to be changed.

RMTTF will come back to the Cancel with Approval language after TDTMS/Tammy or other at ERCOT determines answer to question above.

Following the determination of “evaluation window” revisit 2nd Checkpoint question – “Marketrak will not allow submission of a Cancel with Approval issue that is being submitted outside of the Evaluation Window”.

Market Approved Cancellation Reasons – this piece that includes the 5 scenarios should be deleted.

Cancel without approval will continue in extreme instances and we need to remove the scenarios or revise them. Maybe Tammy created these.

**Next meeting** will be September 21st 9:30 am at the Met Center

Proposed Agenda:

* LMS Registration document review
* LMS statistics
* Finalize 9/26 -27 training details/logistics
* Finalize *MarkeTrak Overview* module
* Continue review of *Cancel w/Approval* module
* Review of *Switch Hold* module – earlier consideration of ‘tips and tricks’ insert