***RMTTF Meeting Notes***

***October 5th, 2017***

***ERCOT MET Center, Room 102***

RMTTF Attending

* Tomas Fernandez NRG
* Carolyn Reed Centerpoint
* Kathy Scott Centerpoint
* Debbie McKeever Oncor
* Sheri Wiegand TXU
* Monica Jones NRG
* Art Deller ERCOT
* Diana Rehfeldt TNMP

Meeting Highlights

Minutes from the October 21st meeting were approved as submitted.

Instructor led classes:

Registered attendees for the Retail 101 were 27 and for the IAG class were 26 for the September 26th & 27th Houston classes that were cancelled (due to Hurricane Harvey).

In the LMS when the date change for the classes was done, the LMS created some automated messages and these folks were automatically enrolled. Art will take care of notifying them bc there is very limited space.

Usage/Billing module

***Usage/Billing – Missing:***

Slide 1 of 5 – pop up should be created for AMS/LSE subtypes…”5 business days should be allowed for transaction processing to complete prior to submitting the Usage Billing Missing issue”. Note: we should not have to wait 5 days in “dispute”. We need it moved to the usage billing missing issue. We think this was an error when we were drafting the two sections. Move to 4.2.3 in the user guide.

Slide 2 of 5 – no changes

Slide 3 of 5 – pop up should be created “a separate MarkeTrak issue is required for each billing period.”

Pop up should be created to emphasize that the MP should wait 5 business days until they should initiate a Marketrak issue for missing transaction. This is giving the transaction time to work.

Slide 4 of 5 – no changes

Slide 5 of 5 – no changes

TDTMS future discussion topic:

Update user guide. Also discuss…should the number of days be changed from “wait 7 days prior to the CR initiating a Marketrak for missing transactions.

***Usage/Billing Disputes***

Slide 1 – add same pop up as on Usage/Billing Missing (see above).

Slide 2 – no changes

Slide 3 – no changes

Slide 4 – no changes

Action item: Review the modules to determine if Kim sometimes reads the question or stops at “Can you answer the following question?”.

***Usage/Billing AMS LSE – Missing***

Slide 1 – no changes

Slide 2 – no changes

Slide 3 – no changes

Slide 4 – no changes

***Usage/Billing AMS LSE – Dispute***

Slide 1 – Pop up that states something that indicates “the Extract role for your Digital Certificate must be provided prior to accessing the extracts on the ERCOT MIS”.

Slide 2 – no changes

Slide 3 – no changes

Slide 4 – no changes

Certificates of completion.

Tomas asked where are we on the certificates of completion for each module. Art to check on the status…we need a certificate of completion added to the LMS for each module completed. Should be the last slide. They can print if they want.

***Agenda topics for next meeting.***

Art to provide status of the certificates.

**TX SET Module discussion:**

**Initial thoughts on TxSET Training**

Some of the suggested topics to cover in the TxSET Training are as follows…

* Swimlanes/ Scenarios
* EDI
* Transaction Timing Matrix
* Solution to Stacking
* Tips & Tricks Document

Conclusion:

* Change Controls
* Texas Market Test Plan

**Introduction: (Use Retail 101 TxSET slides as a starting point) (ONCOR)**

* What is TxSET?
* Why do we have TxSET?
* How is TxSET executed?
  + NAESB protocal (to briefly explain)
* When are TxSET used?
* TxSET Working Group (Match Scope on ERCOT.com)

**Tools/References:**

* ERCOT Protocols (Ch. 15, 19, 24)
  + Overview
* Retail Market Guide
  + Overview
  + Section 7 Market Processes
  + Transaction Timing Matrix (Section 9 Appendix D1)
  + Stacking Logic (Section 11 of the RMG)
* TxSET Webpage
  + Overview
  + Swimlanes
  + EDI Guidelines
  + Testing
* Any other relevant information

**Transactions: (Transaction Names Inventory V4 .0 Card handout)**

* Groupings *(May be able to utilize some of what was in Retail 101)*
  + 814’s
  + 810’s
  + 820’s
  + 867’s
  + 650’s
  + 824’s
  + 997’s
  + T Series
* Interaction Assignment SWIM LANES (TXU)
* Stacking Logic
* MIS/Portal (Monica/Carolyn)
  + Review
  + Demo
* EDI Transaction (
  + Example (Happy Path/UnHpappy Path of MVI)
  + Walkthrough of Examples of EDI transactions from implementation guides.
* TxSET Working Group
  + What is it
  + How it works
  + Change Controls
  + Texas Market Test Plan
  + Any other Information

Conclusion:

At the next meeting we will finish final assignments for TX SET .

**Proposed Planning for TxSET ILT:**

*December* – rough outline from presenters & status update

*January* – show your slides or what you have done

*February* – Slides by all parties should be complete.

*March 1st* – complete initial draft of the TX SET Overview ppt. we will go through the entire ppt.

*April 5th* – final review of the version- ERCOT branded.

*April 13th* - ppt –clean up finished.

*April 18th* – ppt goes to print.

*April 30th* – dry run in Dallas with presenters…start around 10:00 AM or 11:00 AM

*May 1 and 2* – instructor led training in Dallas

**Next Meeting: November 2nd 9:30 ERCOT Met Center**