RMTTF

Thursday, January 11, 2018

9:30 AM

ERCOT Met Center

Room 102

Tomas Fernandez, co-Chair opened the meeting and led the meeting for today.

Antitrust admin was read, agenda was reviewed.

Attending:

In Person

* Tomas Fernandez NRG
* Rebecca Zerwas NRG
* Kathy Scott Centerpoint
* Art Deller ERCOT
* Jim Lee AEP
* Debbie McKeever Oncor
* Sheri Wiegand TXU
* Carolyn Reed Centerpoint

Calling in:

* Kyle Patrick NRG
* Monica Jones NRG
* Diana Rehfeldt TNMP

Marketrak stats

772 total attendees for taking training via the ERCOT Learning Management Center

Registered for the Training in January

5 for Retail 101

2 for IAG

Training for 2018

No changes to the January training

The TX SET overview was scheduled to be May 2nd, but that is being postponed. Instead we will combine the two ppts for Marketrak and IAG and make a single day training.

Presenters for January training:

No changes for Retail 101.

Anyone who did IAG and Marketrak – presenters will be reviewed at the next RMTTF meeting

Action item:

Sheri to check with Dave Michelson to see if he will do the MarkeTrak demo bc he can be both the CR and the TDSP.

Marketrak slides reviewed and comments

1, 2, 3, 4 - no changes

5 – highlight the top 4:

* IAG
* Switch Hold Removal
* Usage and Billing Missing

Note that these make up XX% of the total MarkeTrak issues.

7 and 8 – merge info, change statement to be relevant for training covered in the ppt and show all modules available.

Marketrak *Admin functionality* stays but all details will be moved to the appendix.

Slide 26, 27 – no changes

28 thru 51 will be moved to appendices

Keep all of *bulk insert*

*Usage and Billing* – keep slides but presenter minimizes info

*Missing enrollment transactions* – move slides up to after Usage and Billing and before Switch Hold

*Switch holds* – keep slides – all of them

*Cancel with approval* – look and revise as needed – action item: Sheri to review and align MTUG comments into slide

Drop “*cancel without approval*”

*Other* issues – remove most of the slides but keep 185 and 186 but reverse those. also keep “Siebel changes” – 198 and 199. Remaining slides to move to appendicies

*DEVs* – keep 209, 210 and move the other slides to the appendices.

Revise 209 and 210 to include some info about non-LSE DEVs- Carolyn

Maybe expand on valid and invalid submissions.

- *IAG* slides will be inserted

*Marketrak GUI reporting*

*Demo* which will include IAG and reporting

Wrap up

Note! Later in the year we will look at the stats bc the implementation of NPRR778.

 Below is the list of Marketrak training for presenters. Needs to be revised based on new ppt slides.

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| **MarkeTrak Training 101 – Agenda – February 1st, 2017**1. What is MarkeTrak? MONICA 15 min 9-9:30
	1. recap from Retail 101-
	2. suggest on line MarkeTrak modules
	3. Difference between DEV & D2D –high level
2. General MarkeTrak Navigation – DAVE/ERCOT 30 min 9:30-10
	1. personalizing dashboard- more quick tips
3. Email Notifications ERCOT/DAVE
4. Listserves ERCOT/DAVE
5. Administration Workflows ERCOT/DAVE
6. Bulk Inserts MONICA 30 min 10-10:30
7. Quick Reference Subtypes Carolyn 5 min 10:30-10:35
	1. Carolyn’s sheet - provide handout BREAK until 10:45
8. Day to Day Subtypes
	1. Usage & Billing –Sheri 30 min 10:45-11:15
		1. All subtypes – Usage & Billing , AMS LSE
	2. Switch holds – Oncor/Marty 30 min 11:15-11:45

LUNCH 11:45-12:30* 1. Inadvertent Gains- Tomas 30 min 12:30-1
		1. Rescission

**Lunch*** 1. Cancel w/Approval – Oncor/Marty 30 min 1-1:30
		1. current timelines
		2. proposed changes
	2. Other – Monica 30 min 1:30-2
	3. Missing Transactions – Monica
	4. Service Address- Monica/Tomas
	5. Premise Type- Monica/Tomas
	6. Projects –Monica/Tomas
	7. Market Rule Sheri
	8. Rep of Record - Sheri
	9. Siebel change - Sheri
	10. 997 issues - Sheri
	11. ­­Service Order 650 – Sheri
	12. Safety Net order – Oncor/Marty
	13. Move Out with Meter Removal – Oncor/Marty
1. Data Extract Variances (DEVs) TNMP/Diana 15 min 2-2:15
	1. higher level BREAK 2:15-2:30
	2. more common DEVs
2. Reporting ERCOT/DAVE 1 ½ hours 2:30-4
	1. Background Reports (ERCOT/DAVE)
	2. DEMO
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IAG slides (suggested modifications of IAG training)

Slides 2-3 – delete

Rescission slides – keep 13-19 , change title

 Slides 20-29 move to appendices

Slide 35 – change title – Market Reporting

Move slides 38-46 to appendices

Verification – keep this section

Slide 74 – Demo – moving to combine with other MT demo

Change title slide 75

Revise slides 76-79 data to reflect impacts of NPRR 778

Slide 80 – appendices – revise with implementation date

Keep slides 81-82

Move slides 83-85 to appendices

ACTION: Tomas to combine MT and IGL training decks as noted above for modified MarkeTrak training in May 2018 in Dallas

Items for next meeting, February 1st:

* Debriefing on January training
* MT on line stats
* Matt’s updates from two on line modules
	+ Day to Day
	+ Cancel w/ Approval
* Review combined MT/IAG deck
* TxSET assignments
* Goals/Accomplishments