**Suggested changes for Retail 101**

Module 1: *From Bundled Utilities to Current Market Design*

Condense this. There are currently 20 slides in this module and several could be merged.

Could be condensed by listing each of the items on 9 of the slides with a short definition and where they can find more info. This could maybe eliminate 6 slides.

Example is “Price to Beat” – what we tell them is what “price to beat” was but maybe explain why price to beat was created, something like…“At Market Open all customers were transferred to the affiliate. Affiliates were not allowed to lower their price more than the “price to beat”. This gave other Retailers/competitive retailers an advantage bc they were able to lower their price more. This was an effort to stimulate switching.”

Slide 27 which is the checkpoint question; the answer should be “Investor Owned Utilities” and not any other entity. Another option would be to rewrite the question or totally change the question (once revisions are finished).

The end of Module 1…last 3 slides really don’t fit in for the title of Module 1. They could be moved or maybe change the title of the module 1.

Module 2: Introductions, Roles and Responsibilities

Slide 34, change “resource entities to “Resource/Generation entities”. Many new MPs aren’t clear on what a “resource” is and Generation might be clearer.

Module 3: Market Rules

Slides 63, 65 and 70 are exactly alike but the animation is different. These are used to transition from one of the rules to the next but less time can be spent by shortening the slides.

Could be shortened by listing them on 3 or 4 slides or put info in an appendix.

Module 4: Retail Transaction Processing

Change title to something else that includes the words “TX SET” bc in this module we really talk a lot about TX SET and the flows and systems. Maybe add a slide about the TX SET instructor led training for 2019.

Module 5: Advanced Meter Technology

Revise slide 110 bc 2nd bullet is confusing.

Slide 114 needs to be revised but we already have this map on another slide and AMS is nearly 99% across the market for metered accounts.

Slide 116 – Bottom right; NAESB is misspelled

Note: one of the questions asked was “What is the maximum number of ESI ids that can be extracted on SMT. Find out and maybe include it in the training??? Sheri thought it might be 100.

Slide 122 – in the graph, there are two shades of blue used in the presentation and really hard to tell them apart on the screen.

Also Sheri spends a lot of time talking about the profile so maybe include a slide like “deciphering profiling”…something like that.

Module 6: Data Transparency and Availability

After Slide 156, insert a slide that lists the Marketrak modules available on ERCOT LMS.

**Corrections or suggested changes for TX SET Overview**

* + Slide 35 – add 814 pc and 814 pd
  + Create slide explaining options 1,2,3, for outages and service orders
  + Create slide or add info informing them of the Delivery Service Agreement and that is where they choose option 1,2,3.
  + Slide 42 – Checkpoint Question – change to “what transactions actually determines the start date for a customer.
  + Slide 44 – Kathy was going to check and see if the slides needs revising.
  + Create slide info about POLR/Mass Transition – PUCT Sub rule 25.4.3 – there were many questions asked.
  + Slide on 814\_28 – permit required and completed un-executable – explain the 28CU closes out the process. Explain if the permit is received the REP then will receive an 867\_04.
  + Create slide or add info to explain permit
  + Add 814\_12 and 814\_13 to slide 49
  + Slide 88 – change to “one to many examples”

Comments:

* Maybe too much info on governing documents.
* Lots of questions about 867\_02s
* Lots of questions about new installations
* Checkpoint questions on slide 50 – make sure the 20 day clock is explained before the checkpoint question.
* Explain tampering
* Explain deferred payment plan (DPP)
* Explain about “solution to stacking”…that it is the automated process at TDSPs and ERCOT for trumping orders. Maybe a slide and why we having stacking.
* Less info on the MIS portal
* Slide 91 – the checkpoint questions isn’t about what was just taught in the prior slides.
* What if we changed REP A and REP B to something like…REP Texans and REP Cowboys? – Obviously this is my comment.