RMTTF Meeting

Thursday, October 04, 2018

ERCOT Met Center

Room 168

Attending in person

* Carolyn Reed Centerpoint
* Kathy Scott Centerpoint
* Sheri Wiegand TXU
* Debbie McKeever Oncor
* Tomas Fernandez NRG
* Art Deller ERCOT
* Eric Blakey Just Energy

Via phone

* Diana Rehfeldt TNMP
* Jim Lee AEP
* Ted Hailu ERCOT

Meeting notes from last meeting – posted to no changes - considered final.

Update from the Training held in Centerpoint

Surveys

Art to move to only scanning a code or email survey. No more paper surveys.

Online training stats for Marketrak modules – get complete list

Completed 54 of 105

Complete 642 of 866

Retail 101 – Discussion for Improvements

Needed presentation in ppt. only had it in pdf. PDF does not allow the animation.

We didn’t have presentation in ppt. –Had to use an older version of the presentation.

Did not match the books exactly.

Action items for Art

* Art to develop a list of questions for whom ever is hosting.
  + Should avoid technical issues
  + Will help Art to understand security
* Need ERCOT rep to have an “Iron Key”.
* Before they leave Austin they should download the presentation in ppt on their computer.

Jeopardy game – didn’t have the answers – needs to be with the presentation

ERCOT to bring the TX SET cards – double check they are with the training books when training is delivered to ERCOT. Make sure they are packed before leaving Austin.

Suggested changes for Retail 101 training

Module 1 – minimize the slides to only a couple and list the “building blocks” and refer to the “ERCOT Foundation” web-based training.

This will be done during Art’s schedule of annual refreshing/re-visioning, scheduled for June.

May be going to softcopy only.

Take pens – NRG or TXU Action Item for Sheri and Tomas

Microphone Action item for Host

Suggested changes for TX SET Overview training

Continue mix of teaching styles – add in “think-pair-share” Action Item for Art, RMTTF

Revise schedule per section per presenters Action Item for Sheri

Slide for option 1,2,3 – Delivery Service Agreement Action Item for Sheri

Slide explaining Mass Transition – include definition Action Item for Sheri

Slide 50, 814\_28, details and codes, 28CU, permit required Action Item for Sheri

Include after 50 – slide with the codes for the 814\_28

Slide 50, Title change: MI with Date chg prior to 2 bus. days Action Item for Art

Add slide for “intro to solution to stacking” Action Item for Sheri

Slide 867 – different types Action item for Sheri

Additional comments

* Don’t pass the microphone to read the transaction card in the TX SET class
* Goal to finish up training – 3:30 goal, max 3:45
* Explain what the 814\_20 transaction does “it does a lot of things”
* Figure out what to do about the very small text on the slide for MIS – find transaction
* Less info on MIS portal -during voice over -- same slides just focus on hyperlink availability and codes
* Jim will do “find ESI id and find transactions”
* Sheri to take over with the MIS flows

Agreed Changes to existing TX SET slides

Slide 36 – add 814 pc/pd – Maintain customer information

Slide 43 – What transaction confirms the actual start date for a customer?

Slide 47 – Add tombstone stating “Historical Usage cannot be sent if it is not available – will be included in the 814\_04 transaction with code HUU

Slide 50 – See ACTION ITEMS above! Action item for Sheri

Slide 51 – within 20 “RETAIL PROCESSING” days

Slide 54 – instructor notes – explain Switch Hold, tampering, Deferred Payment Plan

Slides 82 thru 88 – present differently and include what each field is

Slide 92 – move to be slide 44

Slide 93 – change title to “Final Exam” – work in groups (think, pair, share)

Slide 93 - Change REP A and REP B to Cowboys Energy and Texans Energy

Note! Customer calls Texans Energy to cancel the move in before the scheduled date

If cancel is rejected who is the REP of Record (ROR)

Slide 6 of the Answer Key – printed blank

Art to review both presentations for “too much info on governing documents” Stress protocols and guides rule.

16 companies attended retail 101

16 companies attended TX SET Overview

Training – avoid Flight Sign up deadline

2019 training schedule –

* February is posted to the LMS
* Retail 101 – day 1
* TX SET – day 2

May training at Dallas

May 1, 2 –

RMTTF Meeting - May 3

September training in Houston – Wednesday and Thursday

September 25, 26