RMTTF MEETING NOTES

THURSDAY, June 6th, 2019

ERCOT MET CENTER, ROOM 168

9:30 AM

Debbie opened the meeting and read the antitrust.

Attending in person:

Sheri Wiegand TXU

Jim Lee AEP

Kathy Scott Centerpoint Energy

Art Deller ERCOT

Tomas Fernandez NRG

Debbie McKeever Oncor

Jordan Troublefield ERCOT

Call in:

Diana Rehfeldt TNMP

Carolyn Reed Centerpoint Energy

Meeting notes from May meeting were approved.

**LMS Stats for Marketrak**

* 275 in progress
* 686 complete
* 961 total

This year to date

* 19 in progress
* 47 complete
* 66 total

RETAIL 101 –

* 472 in progress
* 180 complete
* 652 total

This year to date

* 98 in progress
* 30 complete
* 128 total

**Registration Numbers**:

*Houston September training –*

Max able to attend: 50 on LMS, room holds 60

Retail 101 33 registered and approx. 10 presenters including ERCOT

TX SET 24 registered and approx. 10 presenters including ERCOT

ERCOT Q2 Training notice will be sent out this week.

ACTION: Sheri to send out a follow up market notice to listserves (RMS, RMTTF, TXSET, TDTMS, PWG) on June 17th stating deadline to register is 9/20/19 and reminder to book hotel reservation early. Follow-up notice to be sent again mid-August and then early September. Messaging will depend on # of reservations.

**SURVEY RESULTS – Retail 101 & TX SET**

Art indicated we only received 6 surveys electronically. TF will move back to paper copies distributed and collected at the training sessions. Comments from surveys for Dallas training were all positive with no actionable items.

**TX SET Presentation Revisions**

Revisions noted from May 3rd meeting will be reviewed at August meeting.

ACTION: New addition (action item from TDTMS) is to include the Transaction Timing Matrix. Kathy Scott will create and send to Art to include in the deck.

**TRAINING PLAN**

**MT/IAG Training** is confirmed for Wednesday, October 30th in HOUSTON.

**MT/IAG Training** is tentatively scheduled for Thursday, January 30th 2020 in DALLAS.

**MT/IAG Training** & **TX SET Training** is tentatively scheduled for May 6th & 7th with **RMTTF meeting** for Friday, May 8th 2020 in DALLAS.

**MT/IAG Training** & **TX SET Training** is tentatively scheduled for September 23rd & 24th 2020 in HOUSTON.

RETAIL 101 scheduling will be discussed later and is proposed as a stand-alone training in 2020.

**MT/IAG Training Presentation**

The overall outlined with presenters was reviewed and modified as follows:

1. INTRODUCTION TO MARKETRAK – WHAT IS MARKETRAK DEBBIE MCKEEVER
2. MARKTRAK NAVIGATION TOMAS FERNANDEZ
3. ADMIN FUNCTIONALITY TOMAS FERNANDEZ
4. EMAIL NOTIFICATION TOMAS FERNANDEZ
5. LISTSERVE TOMAS FERNANDEZ
6. MISSING ENROLLMENT SHERI WIEGAND
7. USAGE AND BILLING SHERI WIEGAND
8. SWITCH HOLDS JIM LEE/MARTY ALLEN
9. SIEBEL CHANGE CAROLYN REED
10. DEVS CAROLYN REED
11. BULK INSERTS TOMAS AND CAROLYN
12. ADDITIONAL DAY TO DAY SUBTYPES - INFREQUENT SHERI WIEGAND
13. CANCEL WITH /WITHOUT APPROVAL
14. SAFETY NET
15. SERVICE ADDRESS
16. PROJECTS
17. MARKET RULE
18. REP OF RECORD
19. 997s
20. PREMISE TYPE
21. SERVICE ORDERS
22. MOVE OUT WITH METER REMOVAL
23. REDIRECT FEES
24. REJECT TRANSACTIONS
25. LUNCH
26. Inadvertent Gains
27. What is IAG? TOMAS FERNANDEZ
28. Rescission Walk Through JIM LEE
29. IAG Walkthrough TOMAS FERNANDEZ
30. Verification KATHY SCOTT
31. Best Practices TOMAS FERNANDEZ
32. Reporting SHERI WIEGAND
33. Background Reports, GUI Reporting TOMAS FERNANDEZ
34. WRAP UP HOST COMPANY

ACTION: Each presenter was assigned to review their slides with the suggested additions…

Slide 5 Sheri will revise and add graph from TDTMS on overall volumes

Slide 6 NOTE: Presenters should remind about on-line module if presenting a relevant section

Slide 7 Sheri will update agenda to align as above

Slides 8 – 24 Tomas to review

Slide 20 – update to ensure escalation time lines are current, understandable, and recommend users utilize the escalation emails via the MT tool

Slide 24 – update listserves to display TDTMS, RMS, and RMTTF

Slides 27 – 45 Carolyn to review

Slides 46 – 76 Sheri to review

Slide 48 – adding a tombstone recommend MTs not be sent too soon and allow the market to work

Slide 78 – adding a tombstone regarding timing of MT submission

Slides 81 – 118 Jim to review

Jim will work with Marty to create a “tips & tricks” on Swith Holds, Tomas and Sheri will provide REP input

Slide 132 – 134 Sheri to review and create additional slide(s) regarding quick explanation of additional D2D subtypes that are available

Slides 135- 141 Carolyn to review

IAG

Slides 142 – 148 Tomas to review - Intro

Slides 149 – 170 Jim to review – Rescission Walk Through

Slides 171 – 191 Tomas to review – IAG Walk Through

Slides 192 – 202 Kathy to review – Verification

Slides 203 – 209 Tomas to review – Best Practices

Slide 204 Sheri to collaborate with Tomas on adding tips to determine difference between MVO & IAG – screen shot of 814\_06

Tomas to also add a slide regarding self-service features

Slides 210 – 225 Sheri to review – Reporting

Suggestion is to remove dates to show generalize

Provide link on where to find report

How to find out one’s REP #

Slide 220 – change title to ‘Market Performance’

Create a slide to visually depict time line for processing an IAG MT

Slide 241 – Delete – removing demo

ACTION: Tomas will reorder slides to align with new agenda and post to June meeting page. Presenters are to post assignments to July 11th meeting page and send to [marketsupportservices@ercot.com](mailto:marketsupportservices@ercot.com) by July 8th.

Once presentation is complete, it will be submitted to ERCOT for ‘de-branding’ and removing ERCOT logos.

**RETAIL 101 Revisions**

Art presented the revised outline for Retail 101. As planned, sections of Retail 101 will be moved to other pre-requisite classes offered by ERCOT.

Art will have the draft slides prepared for the August meeting. Revisions will be reviewed and finalized at the September 11th meeting and ready for presentation at the September 23rd Houston training.

**Mass Transition Module**

ACTION: Jim and Sheri will create slides from the detailed outlined. TF will review and then the script will be created. Goal is for August or September RMTTF meeting review.

Meeting adjourned at 2:15 pm

**Agenda for July 11th meeting**:

* Review MT/IAG assignments
* Update on Houston training enrollment
* LMS Stats – MT and Retail 101
* Discuss Training Plan for 2020