RMTTF MEETING

Thursday, July 11, 2019

Room 168 – ERCOT

Attending in person:

* Kathy Scott Centerpoint
* Debbie McKeever Oncor
* Art Deller ERCOT
* Sheri Wiegand TXU
* Jim Lee AEP
* Jordan Troublefield ERCOT

Attending via phone

* Diana Rehfeldt TNMP
* Two other parties dialed in but didn’t share their names

Sheri Wiegand Chaired the meeting and read the antitrust admonition statement.

Agenda was read – no changes made.

No changes made to the notes from last meeting – notes approved.

Action items from last month were reviewed.

Kathy added the transaction timing maintenance and group exercises.

Discussion today – we might change the slides again.

Tomas was unable to attend today but Sheri did the slides and is working with Jim to make sure it flows.

Art Deller provided the Stats

Marketrak year to date:

27 in progress

67 complete

94 total

Last month we had a total of 66 so this is a big increase for one month.

Marketrak – all time

283 in progress

702 complete

989 total

Retail 101 – Year to date

115 in progress

34 complete

149 total

Retail WBT All time

489 in progress

184 complete

673 total

Attendees for Retail 101

September 25 – 50 - class is full

4 on the waiting list

Attendees for TX SET

September 26 – 50 – class is full

1 on the waiting list

Each class will be increased to 55.

The ERCOT LMS Registration ends on the 20th of September

August 12 – first reminder

Sheri to send a follow up reminder notice on September 10th for the reminder which will say they need to cancel if unable to attend.

Kathy will need a preliminary list of attendees from Art on 9/16 to for security with a final follow up list on 9/23.

IAG Training set for October 30th

Confirmed Wednesday, October 30 in Houston.

We will go thru the deck and see what is realistic.

AEP is scheduling their workshop – November 5, 6 in Corpus.

Jim noted that might be a lot of travel for some people to go to Houston the 30th and then RMS and the AEP workshop.

Training schedule in the notes from last meeting.

Carolyn is on a project and cannot present = putting Kathy down in Carolyn’s place for:

10. Siebel Change

11. DEV LSE/Non-LSE

12. Bulk insert

Also under “verification” under IAGs – lower part of the presentation.

IAG Power point presentation – changes below for presenter in order of presenter

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| DEBBIE’S SECTION  1 – Not changed  2 – Not changed  3 – Not changed  4 – Not changed  5 – MarkeTrak subtypes – changed with current info from TDTMS slides. – More current info will be available on July 1 so the current info 2018 will be replaced with that.  6 – Same as slide 5 – updated – Debbie to emphasize the RMGRR129 removing ERCOT’s one day evaluation window eliminating the need for the cancel with approval MarkeTrak subtype. Effective date was December 2017 – Debbie emphasize the info in the tombstone “(IAG, IAL and RESC) make up %…”  7 – Not changed  8 – Changed to the updated agenda topics in the presentation  \* Sheri is flipping 7 and 8 and the old 7 is going to the appendix – this ends Deb’s slides |

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| TOMAS’S SECTION  Tomas starts with General Marketrak navigation and runs through ERCOT Listserve.  No slide changes to Tomas’s slides until first slide of email notifications.  Updating “escalation timelines…”  Changing slide “Automated Email Notifications” – replace with language from the User Guide section 1.9.2 – changed during the meeting.   * NOTE! ADD MISC STATEMENT ABOUT “User Guide” to some slide – probably Debbie’s bc those slides are at the beginning of the training.   To the slide “individual email notification” adding a tombstone – “Recommend users utilize escalation emails via the Marketrak tool.”  Slide “Subscribing to ListServ “ – replacing “you” with “user”  Listserv slide- removing the slide bc the display on ercot.com for signing up and the actual list of the listserv has been changed. |

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| SHERI  Missing Enrollment transactions – Highlighted the 3rd bullet about not sending the Marketrak issue too soon…give the market process a chance to work.  This bullet also added to Billing Usage slide  D2D Issues – change to “comments highly recommended”  Also bolded info on slide 24 |

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| JIM  Jim starts with Switch Hold  defined what switch hold is… language about PUCT subst rule 25.126 and PUCT Subst. Rule 25.480 – adding slide with  “What is it”  “Purpose”  Types:  Next slide – Types of Switch Hold  Next slide – Switch hold removal for purposes of a Move in  Next slide – how it works! |

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| KATHY SCOTT – PREVIOUSLY CAROLYNS SECTION  Defined: “SIEBEL is the ERCOT registration system of record that maintains ESI id activity”.  Siebel is now just two slides.  DEVS  They are used to correct a “Service Row History” in the 727 Service Order History Extract. |

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| BULK INSERT – this section will be reviewed at the next meeting. It was suggested the slides be updated and simplified . |

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| INADVERTENT GAINS – the TF will review these slides at the next meeting. |

The proposed agenda for the next meeting is as follows:

1. Review MT/IAG assignments
2. Review Retail 101 deck – Art’s revisions
3. Review TXSET deck changes (Kathy’s revisions)
4. Discuss logistics for September training

The next meeting is scheduled for Thursday, August 8th.

Art also reviewed the possible training plan for 2020 for Retail 101..

Dallas

Houston

New Braunfels