RMTTF

September 11, 2019

ERCOT Met Center

9:30 am

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Attendees: On the phone:

Tomas Fernandez, NRG Aubrey Hale, ERCOT

Art Deller, ERCOT Mariah Benson, PUC

Jordan Troublefield, ERCOT Eric Blakey, Just Energy

Kathy Scott, Centerpoint Diana Rehfeldt, TNMP

Jim Lee, AEP Scott Smyth

Sheri Wiegand, TXUE

Sheri opened the meeting reading the Antitrust Admonition.

Minutes from 8/8/19 were reviewed and approved.

**SEPTEMBER 2019 Houston Training** as of 9/11

|  |  |  |
| --- | --- | --- |
| **Training Class** | Enrolled | Wait List |
| Retail 101 | 55 | 10 |
| TxSET | 55 | 3 |
| MT/IAG | 7 |  |

**LMS Stats**

|  |  |  |  |
| --- | --- | --- | --- |
| **LMS Stats** | In Progress | Complete | Total |
| MT YTD | 34 | 75 | 109 |
| MT All Time | 290 | 714 | 1004 |
| Retail 101 YTD | 151 | 46 | 197 |
| Retail 101 All Time | 525 | 196 | 721 |

**TxSET Training Deck**

Slide 28 will be Transaction Timing Matrix added/to be presented by Kathy Scott.

Once included, deck is ready for print.

**RETAIL 101 Training**

Edits were performed as Art went through the presentation.

In general, edits were more cosmetic and not substantive.

Deck will go to print on 9/18.

Paper surveys will be utilized.

Art may print the relationship room.

Art may also consider revising and utilizing the Jeopardy game.

**Houston Training Logistics Reminder**

* Art to bring the second laptop for Retail 101
* Kathy will provide the second laptop for TXSET 101
* TXSET
  + Art – answers for flows, swim lanes, transaction sheet
  + Sheri – large laminated TxSET transaction cards
  + Tomas – TX flows laminated card, 15 laminated “dot” cards, dry erase markers, index cards
  + Kathy – name tags, markers, candy for tables, and large candy bars for prizes, props, tent cards for presenters (to reserve tables in the back)
* TRAINING REMINDERS – ACTION ITEM for Sheri
  + Training for Retail 101 and TxSET 101 reminder and cancellation request if unable to attend - sent 9/13
  + Training for MKT/IAG notice – piggybacking off ERCOT market notice – limited to 50 and lunch will be provided – sent 9/13

**MarkeTrak / IAG Training Deck**

The training deck was reviewed with the following suggested revisions:

* Slide 5 – matrix show increases in red
* Slide 6 – modify graph to only show top 8-10 and revise y axis
* Slide 204 – add reference to RMG 7.2 in tombstone
* Reporting IAGs– modify graphs and post in Oct meeting
  + Color in year boxes
  + Alter the y axis
  + AVERAGE Days to Resolution – average year values and modify to trend line
* Slide 229 & 230 – Tomas will add new screen shot and break into two slides listing out reporting types
* Moved Background Reports to the front and add a screenshot on where to find
* Slides 232 – 235 move to the Appendix
* Slides 236 – 240 move to the Appendix

**Training Plan for 2020**

Has not changed from earlier discussion…

Art has secured a date in mid-January for Retail 101 – Tuesday, January 14th

|  |  |  |  |
| --- | --- | --- | --- |
| MONTH | LOCATION | TRAINING | COMMENTS |
| JANUARY | AUSTIN | RETAIL 101 | ART TO CHECK AVAILABILITY AT THE MET CENTER |
| FEBRUARY | AUSTIN | TX SET | DEB AND KATHY TO FIND LOCATION |
| FEBRUARY | AUSTIN | INADVERTENT/MARKETRAK | DEB AND KATHY TO FIND LOCATION |
| APRIL | DALLAS | RETAIL 101 | HOSTED BY ONCOR |
| MAY 6 | DALLAS | TX SET | HOSTED BY ONCOR |
| MAY 7 | DALLAS | MARKETRAK/INADVERTENT | HOSTED BY ONCOR |
| AUGUST | HOUSTON | RETAIL 101 | HOSTED BY CENTERPOINT |
| SEPTEMBER 23 | HOUSTON | TX SET | HOSTED BY CENTERPOINT |
| SEPTEMBER 24 | HOUSTON | MARKETRAK/INADVERTENT | HOSTED BY CENTERPOINT |

**JEOPARDY Brainstorm for MKT / IAG Training**

ACTION ITEM: working group is to consider other questions for the Jeopardy game. Goal is to have five categories with three questions each reviewing some key points from training.

Categories:

* **‘Tick Tock’** – time related questions
  + Q: The time allowed to process a Switch Hold once MT is submitted
  + A: What is 4 hours?
  + Q: From submittal of MT, the latest date for BDMVI to regain an ESI
  + A: What is 10 days?
  + Q: 3 federal business days from receipt of Terms of Service
  + A: What is a rescission?
* **‘Fact or Fiction’** – true or false questions
  + Q: I can reject regaining an ESI if my customer no longer lives in the premise
  + A: Fiction
* **‘Who lives here’ / ‘Who’s Home’**- simple situational examples
  + Q: Required form to initiate the release of a Switch Hold
  + A: What is a New Occupant Statement?
* **‘Whose Fault Is It?’** 
  + Q: This MT subtype is submitted when a customer is receiving his neighbor’s invoice for Apt A and lives in Apt B.
  + A: What is an IAG?
  + Q: This MT subtype is submitted when a REP hasn’t received the initial meter reading
  + A: What is a Missing Transaction?
  + Q: This MT subtype is submitted when the sum of the interval data does not mat the total on an 867
  + A: What is an AMS LSE Dispute?
* **‘Thou Shalt Not…’** – exceptions
  + Q: When an IAG has been been identified, never submit this transaction
  + A: What is an MVO?
  + Questions on invalid reject reasons

NEXT MEETING – Thursday, October 3rd

The November meeting will be moved to October 31st in Houston, the day following the MT/IAG Training. ACTION ITEM Tomas will send a note to ERCOT to modify.

Proposed Agenda for 10/3

1. Review LMS Stats
2. Review feedback from 9/24 – 9/25 training
3. Final Review of MT /IAG training deck
4. Discuss meeting calendar 2020
5. Begin discussion of RMTTF accomplishments for 2019 and goals for 2020