RMTTF MEETING

Thursday, October 03, 2019

9:30 AM

ERCOT MET CENTER, ROOM 168

ATTENDING IN PERSON

* DEBBIE MCKEEVER ONCOR
* JIM LEE AEP
* ART DELLER ERCOT
* SHERI WIEGAND TXU
* TOMAS FERNANDEZ NRG
* KATHY SCOTT CNP

ATTENDING VIA PHONE

* DIANA REHFELDT TNMP

TOMAS LED THE MEETING STARTING WITH THE ANTITRUST STATEMENT.

INTRODUCTIONS FOLLOWED

NO COMMENTS RECEIVED FROM LAST MONTHS NOTES SO NOTES ARE CONSIDERED FINAL.

LMS STATISTICS TO DATE:

MARKETRAK YEAR TO DATE

COMPLETE IN PROGRESS TOTAL

36 75 111

MARKETRAK ALL TIME

292 714 1006

RETAIL 101 YEAR TO DATE

167 55 222

RETAIL 101 ALL TIME

541 205 746

REGISTRATION SIGN UPS FOR IAG/IAS – MARKETRAK

* 50 REGISTERED
* 1 ON THE WAIT LIST
* ROOM CAPACITY INCREASED TO 55

RETAIL 101 SCHEDULED IN AUSTIN JANUARY 15

RETAIL 101 IS CURRENTLY SCHEDULED FOR JANUARY 14 AND WAS SCHEDULED IN ROOM 206 HOWEVER IT HAS BEEN MOVED TO ROOM 168 DUE TO A FERC MEETING NEEDING ROOM 206. ART FOUND OUT LAST WEEK.

168 IS TOO SMALL SO ANOTHER ROOM IS NEEDED. ART TO POSSIBLY FIND ANOTHER DATE. BY LOOKING AT THE ERCOT MEETING CALENDAR FOR MEETINGS POSTED FOR 2020, WE COULD POSSIBLY HOLD THE TRAINING ON ONE OF THE FOLLOWING DATES:

* JANUARY 23 – THIS IS ALSO THE SAME DATE AS TDTMS BUT MAYBE THAT COULD BE MOVED
* JANUARY 28
* JANUARY 30

ART WILL GET WITH SUZY WHO HAS THE COMPLETE SCHEDULE OF MEETING ROOMS AND SEE IF ANY OF THE 3 OPTIONS ABOVE WILL WORK.

SURVEY RESPONSES FROM RETAIL 101 TRAINING HELD AT CNP ON SEPTEMBER 25

6 ONLINE RESPONSES RECEIVED

28 PAPER

34 TOTAL

RESPONSES WERE OVERALL POSITIVE

SEE ERCOT STATISTICS DOCUMENT FOR COMPLETE DETAIL – ART DELLER HAS THE INFO.

COMMENTS-DISCUSSION - RETAIL 101 TRAINING HELD AT CNP ON SEPTEMBER 25

PER DEBBIE - METERING MODULE NEEDS MORE DETAIL

PER ART - TOO MUCH TIME ON ERCOT SLIDES

PER GROUP - MORE ACTIVITY NEEDED FOR THE GROUP INTERACTIONS

PER TOMAS - ESI ID A BIT CONFUSING. MAYBE SHOW AN ESI id WITH NUMBRERS – NOT Xs

ART TO BRING BACK SOME OF THE SLIDES INCLUDING THE RELATIONSHIP ROOM

PER ART - SLIDE 20 – WAY TOO MUCH TIME – 3RD BULLET – TOO LONG

PER ART – HAS ALREADY BROUGHT BACK PROTOCOL SLIDES

PER SHERI - KEEP 67 THROUGH 69 AND 72 TO 75 GUIDE HIGHLIGHTS

PER ART - ALREADY BROUGHT BACK THE GUIDE HIGHLIGHTS

PER DEBBIE – SESCO DOE CODE IS NOT INCLUDED – WAS NOTED BY HEATHER WITH ONCOR

TOMAS SAID WE NEED TO MOVE ON. ART SAID ANY OTHER COMMENTS – SEND TO HIM

SURVEY RESPONSES FROM TX SET

TOMAS WENT THROUGHT THE SURVEY RESPONSES RECEIVED

21 RESPONSES RECEIVED – ALL VIA PAPER

NO ONLINE RESPONSES WERE RECEIVED

OVERALL RESPONSES RECEIVED WERE POSITIVE.

CLASS SIGNS WERE UP TO 44.

21 RESPONSES IS SEEN AS TOO LOW FOR THAT HIGH ATTENDANCE

DISUSSION - TX SET TRAINING HELD AT CNP

BETTER SCREEN SHOT OF MIS IS NEEDED

SWITCH HOLD – ADD EXPLANATION

ADD TO SLIDE 91 – MUST BE EXECUTED IN TWO BUSINESS DAYS…

SLIDE 92 – CHANGE ARROWS – ART CHANGED DURING THE MEETING BUT ARROWS ARE GOOD THROUGH 6. 7A AND 7B ARE NOT CONNECTED – ANIMATION NEEDS TO BE CHANGED TO SHOW MOST OF THE TIME THE 867\_04 IS SENT FIRST.

SLIDE 92 – ORDER OF MASS TRANSTION FLOW ISN’T CORRECT BUT IT MATCHES THE SWIMLANE. DIANA IS GOING TO GET KATHRYN THERMAN INVOLVED. JIM GIVING THE NEW NUMBERS TO ART TO MAKE THE CHANGES.

116 – MAKE SURE THAT THE ANSWER DOESN’T POPUP WITH THE QUESTION

SLIDE 113 - WE NEED TO PUT EVERYTHING ON THE LAMINATED COPY SO IT IS EASIER FOR THE ATTENDEES TO DETERMINE THE FLOW AND READ THE STATEMENTS AT THE SAME TIME. NRG WILL BE RESPONSIBLE FOR BRINGING THOSE IN SIZE 11 X 16.

“HUU” IS THE CODE IN THE 814\_04 IF HISTORICAL USAGE DOES NOT EXIST.

SLIDE 62 – 3 CHECKPOINT QUESTIONS – REMOVING THE 3RD

HUU – HISTORICAL USAGE UNAVAILABLE

SLIDE 6 ON THE TX SET PRESENTATION – ORDER OF THE AGENDA IS INCORRECT

MOVE BULLET 7 TO ON THE AGENDA SLIDE BELOW GOVERNING DOCUMENTS

SHERI IS GOING TO ADD THE HINTS TO THE BIG EXAM AT THE END

TDSPS TO BRING LOTS OF CANDY – HALLOWEEN!

BIG CANDY BARS WERE A BIG HIT. VERY POPULAR!

 TRAINING FOR NEXT YEAR – NEED TO FINALIZE ASAP

|  |  |  |  |
| --- | --- | --- | --- |
| 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 |

POSSIBLE DATES FOR TX SET AND MARKETRAK FOR AUSTIN. NONE OF THE DATES BELOW CONFLICT WITH ANY KNOWN ERCOT RETAIL MARKET MEETING OR SUBCOMMITTEE MEETING.

1st choice February 11, 12

3rd choice February 18, 19 (WOULD REQUIRE A WG MEETING CHANGE)

2nd choice March 4, 5

MAY 6 AND 7 IN DALLAS AT ONCOR – DEBBIE TO GET THE DATES FINALIZED AND ALSO SELECT A DATE FOR RETAIL 101 IN DALLAS IN APRIL. SHE WILL LET THE GROUP KNOW ASAP

IAG TRAINING – SLIDE DISCUSSION

Title slide – change to MarkeTrak and Inadvertent Gain Training

Slides 2, 3, 4 no changes

Slide 5 Agenda

Slide 6, 7 no changes

Slide 8 Sheri has inserted the table from TDTMS – Deb’s slide

Slide 9 insert “r” in ecot” and animation was added

Copy slide 64 as revamped and insert into TX SET presentation slide 65.

Note! For all presentations going forward make sure the slides are large enough and can be read.

Slide 214 and 215 – referencing

Jeopardy – revisions made

When a rep hasn’t receive an initial meter read.

Note! When “are you my type” – make sure to emphasize

My customer no longer occupies the premise – what is an invalid reject reason

Thou shalt not issue this subtype for a move in transaction.

When a customer changes it’s mind – cannot issue this subtype on new construction enrollment

Allowed to submit multiple subtypes on a single bulk insert. Fact or Fiction.

Backdated move-ins cannot be submitted without prior TDSP approval.

This feature can only be updated by a MarkeTrak administrator.

Best It is the responsibility of the MarkeTrak administrator to update this quarterly.

Escalation contacts are maintained in this feature and should be updated quarterly.

TICK TOCK - CATEGORY

$50 TOTAL TIME ALLOWED FOR ALL PARTIES TO COMPLETE A SWITCH HOLD REMOVAL MARKETRAK

$100 REGAIN DATE CAN’T BE LONGER THAN ? # OF DAYS FROM MARKETRAK ISSUE SUBMITTAL

$150 NUMBER OF DAYS ALLOWED TO RESCIND A SWITCH (814\_01)

ANSWERS

$50 WHAT IS 4 BUSINESS HOURS?

$100 WHAT IS 10 DAYS?

$150 WHAT ARE 3 FEDERAL BUSINESS DAYS

THOU SHALL NOT - CATEGORY

$50 NEVER SUBMIT THIS TRANSACTION ON AN INADVERTENT GAIN

$100 REPS ARE NOT ALLOWED TO PASS THESE ONTO A CUSTOMER WHO RESCINDS

$150 DO NOT SUBMIT THIS SUBTYPE WITHIN 3 DAYS FROM THE EXPECTED METER READ DATE

ANSWERS

$50 WHAT IS A MOVE OUT?

$100 WHAT IS FEES, CHARGES, CONSUMPTION (CHANGE TO USAGE)

$150 WHAT IS MISSING USAGE AND BILLING

FACT OR FICTION CATEGORY

$50 SWITH HOLDS REMOVALS ARE COMPLETED BY THE REP

$100 ALLOWED TO UBMIT MULTIPLE SYBTYPES ON A SINGLE BULK INSERT

$150 BACK DATED MOVINS CANNOT BE SUBMITTED WITHOUT PRIOR TDSP APPROVAL

ANSWERS

$50 WHAT IS FICTION

$100 WHAT IS FICTION

$150 WHAT IS FACT

ARE YOU MY TYPE? - CATEGORY

$50 USED BY REP TO DISPUTE LSE DATA

$100 USED WHEN A REP HASN’T RECEIVED THE INITIAL METER READ (867\_04)

$150 USED WHEN YOUR ISSUE CANNOT BE RESOLVED WITH A TRANSACTION

ANSWERS

$50 WHAT IS AN AMS LSE DISPUTE

$100 WHAT IS A MISSING TRANACTION?

$150 WHAT IS A DEV

BEST PRACTICES- CATEGORY

$50 THIS FIELD IS USED TO PROVIDE ADDITIONAL INFO IN ORDER TO EXPEDITE RESOLUTION

$100 ESCALATION CONTACTS ARE MAINTAINED IN THIS FEATURE THAT SHOULD BE UPDATED QUARTERLY

$150 PROCESS FOR REGAINING AN ESI ID WHEN A CUSTOMER NO LONGER OCCUPIES PREMISE

ANSWERS

$50 WHAT ARE COMMENTS

$100 WHAT IS THE ROLODEX

$150 WHAT IS THE CURRENT OCCUPANT PROCESS

THE GUIDING LIGHT

$50 MY CUSTOMER NO LONGER OCCUPIES THIS PRMEISE

$100 REQUIRED FOR TO INITIAT THE RELEASE OF A SWITCH HOLD

$150 THIS SECTION OF THE RMG CONTAINS THE PROCESS FOR RESOLVING INADVERTENT GAINS

ANSWERS

$50 WHAT IS AN INDVALID REJECT REASON

$100 WHAT IS THE NEW OCCUPANT STATEMENT

$150 WHAT IS RMG 7.3

IAG – MARKETRAK PRESENTATION – SECTION AND SLIDE NUMBERS PER PRESENTERS

INTRO TO MARKETRAK, WHAT IS MARKETRAK SLIDES 1 THRU 9 DEBBIE

MARKETRAK NAVIGATION SLIDES 10 THRU 20 TOMAS

ADMIN FUNCTIONALITY SLIDES 21, 22 TOMAS

EMAIL NOTIFICATION SLIDES 23 THRU 25 TOMAS

LISTSERVE SLIDES 26 THRU 28 TOMAS

MISSING ENROLLMENT SLIDES 29, 30 THRU SHERI

USAGE AND BILLING SLIDES 31 THRU 62 SHERI

SWITCH HOLDS SLIDES 63 THRU 87 JIM LEE

SIEBEL CHANGE SLIDES 88 THRU 90 KATHY SCOTT

DEVS SLIDES 91 THRU 94 KATHY

BULK INSERTS SLIDES 95 THRU 115 TOMAS AND KATHY

ADDITIONAL DAY TO DAY SUBTYPES SLIDES 116 THROUGH 119 SHERI

OTHER ISSUES SLIDES 120, 121 SHERI

LUNCH

INADVERTENT GAINS SLIDES 122 THRU 129 TOMAS

RECISSION WALK THRU SLIDES 130 THRU 151 JIM

IAS WALK THRU SLIDES 152 THRU 173 TOMAS

VERIFICATION SLIDES 174 THRU 184 KATHY

BEST PRACTICES SLIDES 185 THRU 194 TOMAS

REPORTING SLIDES 195 THRU 212 SHERI

BACKGROUND REPORTS SLIDES 213 THRU 216 TOMAS

ADD SLIDE FOR THE SURVEY 217

HAND OUT SLIDES FOR THE SURVEY

SLIDE 218 – SLIDE BROUGHT UP ANNOUCING JEOPARDY

MARKETRAK JEOPARDY – JIM WILL SERVE AS ALEX - THIS IS A SEPARATE PRESENTATION

LOGISTICS

TOMAS - BRINGING THE LAMINATED SHEETS FOR TIPS AND TRICKS FOR BULK INSERT

KATHY - COMPUTER, NAMETAGS, CANDY, MICROPHONES, QUICK REFERENCE GUIDE

ART PROVIDE FINAL ATTENDEE LIST TO KATHY FOR CENTERPOINT SECURITY BY OCT 25

APPENDIX TO BE PROVIDED ELECTRONICALLY WITH THE CLASS MATERIALS

MEETING AGENDA ITEMS FOR NEXT MEETING - DEBBIE LEADING NEXT MEETING

* ADJOURN PRIOR TO LUNCH
* ANTITRUST
* INTRODUCTIONS
* LMS STATS
* 2020 CALENDAR FOR TRAINING
* MARKETRAK TRAINING
* BEGIN LOGGING ACCOMPLISHMENTS AND GOALS FOR 2020

RMTTF MEETING TODAY ADJOURNED AT 3:25