**TAC Approved March 31, 2016**

* 1. Align Retail Market Subcommittee Goals with TAC goals and the strategic vision of the ERCOT Board of Directors.
  2. Maintain rules that support Retail Market processes and promote market solutions that are consistent with PURA and PUC.
  3. Support the appropriate incorporation of demand response and load participation in the Wholesale market.
  4. Explore and Implement Retail Market Enhancements.
  5. Facilitate market enhancements necessary to leverage the capabilities of Advanced Metering Systems in the retail market and improve the integrity and availability of AMS data to Market Participants.
  6. Maintain market rules that support open access to the ERCOT retail market.
  7. Continue to work with ERCOT to develop Protocols and other market improvements that support increased data transparency and data availability to the market.
  8. Support all phases of ERCOT’s implementation of SCR786, Retail Market Test Environment, including but not limited to developing market requirements, project planning, system testing, project execution along with market education and communications.
  9. Assess and develop Retail Market training initiatives that may include ERCOT’s Learning Management System’s (LMS) online modules and Instructor Led Market Training courses and/or webinars.

**Advanced Metering Working Group (AMWG) 2016 Goals**:

1. Evaluate options for streamlining access to Advanced Metering Systems (AMS) data
2. Support RMS and other market forums as issues arise related to Advanced Metering Systems (AMS) data
3. Review and update “TDSP AMS Data Practices” matrix to reflect current business processes
4. Evaluate, support and contribute to the enhancement of SMT functionality, usability and reporting
5. Evaluate methods and/or strategies for expanding customer registration options to SMT (e.g., Federation – 3rd Party Registration on behalf of Customers)
6. Track regulatory changes related to AMS data or data access and provide subject matter expertise as needed

**Texas Standard Electronic Transaction (TX SET) Working Group 2016 Goals**:

1. Continue to Update Texas SET procedures, Retail Market Guide and Protocols as Directed by RMS
2. Analyze Issues as they are presented to Texas SET
3. Monitor Flight Testing and Recommend Changes to Scripts as Needed
4. Evaluate if there is a need for a Texas SET Release
5. Analyze and Provide Recommendations to ERCOT and TDTMS for the Implementation of SCR786, Retail Market Test Environment
6. Review the Texas SET Swimlanes and update as needed
7. Review and Provide Recommendations to the Safety Net Timelines
8. Create New Entrant Procedures and Documentation

**Texas Data Transport and MarkeTrak Systems (TDTMS) Working Group 2016 Goals:**

1. Support Texas data transport improvement initiatives and other Retail market projects as needed or directed by RMS.
2. Support Revision Request initiatives related to MarkeTrak systems and process enhancements and update documentation as needed.
3. Continue joint efforts with other Retail market working groups to provide ERCOT with subject matter expertise for implementation of SCR786, Retail Market Test Environment.
4. Perform annual review of the Retail Market Services SLA and work with ERCOT to evaluate and implement any potential changes, as needed.
5. Monitor the quarterly ERCOT Retail Market Performance Measures reported by ERCOT to the PUCT and serve as a forum for Market Participants to raise questions and/or issues related to the metrics reported.
6. Work with ERCOT and Market Participants to address and resolve technical connectivity issues and help mitigate market impacts related to NAESB outages.
7. Support ERCOT resolution efforts in addressing each outage and/or degradation of service experienced and provide findings to RMS.
8. Continue participation in NAESB meetings, as needed, in an effort to ensure business requirements for the Texas retail market are included in NAESB Model Business Practices (MBP) and future NAESB EDM version releases.

**Retail Market Training Taskforce (RMTTF) 2016 Goals**:

**Develop and Complete 5 Online MarkeTrak Training Modules**

RMTTF plans to complete at least 5 online training modules in 2016.

Below is the list of MarkeTrak modules we have slated to be developed. Additional modules may be added to the list if needed.

* MarkeTrak Module 06 - Other D2D Subtypes
* MarkeTrak Module 07 - Bulk Insert
* MarkeTrak Module 08 - GUI Reporting
* MarkeTrak Module 09 - DEV LSE Subtypes
* MarkeTrak Module 10 - DEV Non-LSE Subtypes
* MarkeTrak Module 11 - Emails and Notifications
* MarkeTrak Module 12 - Background Reporting
* MarkeTrak Module 13 - Admin Functionality

**Retail Instructor Led Classes**

* Retail 101: Austin, Dallas and Houston
* MarkeTrak: Austin, Dallas, Houston

Austin Hosted by ERCOT

* + - * Retail 101: February 9, 2016
      * MarkeTrak: Date and Time TBD

Dallas Hosted by TXU

* + - * Retail 101: May 5, 2016
      * MarkeTrak: May 6, 2016

Houston Hosted by CenterPoint Energy

* + - * Retail 101: September 27, 2016
      * MarkeTrak: September 28, 2016