RMTTF MEETING NOTES

THURSDAY, March 07, 2019

ERCOT MET CENTER, ROOM 210

9:30 AM

Debbie opened the meeting and read the antitrust.

Attending in person:

Sheri Wiegand TXU

Debbie McKeever Oncor

Teresa Turner Oncor

Jim Lee AEP

Kathy Scott Centerpoint Energy

Art Deller ERCOT

Tomas Fernandez NRG

Call in:

Diana Rehfeldt TNMP

Carolyn Reed Centerpoint Energy

Ted Hailu ERCOT

Meeting notes from February meeting were reviewed and approved. Sheri will post to today’s meeting.

**LMS Stats for Marketrak**

* 263 in progress
* 645 complete
* 908 total

This year to date

* 7 in progress
* 6 complete
* 13 total

RETAIL 101 – launched in Dec 2016

* 432 in progress
* 163 complete
* 595 total
* Stats for 2018 :
  + 194 in progress
  + 88 complete
  + 282 total

**Registration Numbers**:

*Dallas Training May (Oncor)*

Max able to attend: 50

Retail 101 23 registered and approx. 10 presenters including ERCOT

TX SET 34 registered and approx. 10 presenters including ERCOT

*Houston September training –* not opened up yet on LMS

**ACTION ITEM**: Art will “open up” the September training in Houston on LMS.

Sheri will piggyback the ERCOT market notice to send the training information to RMS, RMTTF, PWG, TXSET, and TDTMS listserves on March 26th with a registration deadline of April 26th.

**Review of Surveys for RETAIL 101 and TX SET Training Classes- Georgetown:**

Received 11 surveys for TX SET and 14 for Retail 101 using the electronic method.

Consistent theme for both classes is that participants like the engaging material, found presenters knowledgeable, and had their questions addressed.

Attached are the comments received.



**Suggested revisions to schedule**

45- minute lunch is suggested

Provide coffee in the afternoon

Allow time to complete survey prior to end of class

**RETAIL 101 Presentation** **Revision**

Slide 67 – 25.43 (second row) should be changed to 25.107 and add the associated hyperlink

**TX SET Presentation Revisions**

Slide 45- swap Discretionary and Non-Discretionary Charge references

Slide 13 should be slide #8

MVI:

* Slides 49/50/51/52 to be taught
* Slides 53/54 to be completed individually (date change/cancel)
* Slide 55 (Mass Transition) will be moved to slide 84 – later in the presentation and a summary of Mass Transition will be added in front of that

SWI:

* Slides 57/58 to be taught
* Slides 59/60/61/62 to be completed individually (SWI w/ SH, SH add tampering & DPP)

MVO:

* Slides 65/66 to be taught
* Slides 69-78 to be taught
* Slides 79/80/81/82/83 to be completed individually

Mass Transition:

* Slides 85/86 to be taught

Slide 103 Title to be changed to “Group Exercise”

* There are 9 transactions, so ideally, we would like to have 9 groups
* Teams will be challenge each other to see who had all answers correct
* Tie breaker will be final two questions of exercise
* Winning team will get larger candy bars

Copy slide 114 and move to slide 107 to encourage survey completion

**Mass Transition Module**

WG continued development of the outline and created course objectives as noted on the attached document. Next meeting the WG will review 25.43 to ensure all important points of the rule are covered.



**Logistics for May training (same as other Training – highlights are new)**

Art:

2 laptop – both days

Relationship slide – printed

AMS Data slide - printed

TX SET dot answer sheet – printed for presenters

Jeopardy Game – provide current version and printed answer sheet

Swim lanes - printed

2 sheets for the transactions – large printout

Debbie:

Tent cards for presenters

Candy bars for prizes for Group Exercise (TXSET 101)

Tomas:

Index cards and laminated cards for TX SET

Kathy:

Nametags, markers, candy and props

Sheri:

Large laminated transactions cards for TX SET

**Next Meeting… April 4th, ERCOT Met Center**

* Review of feedback from training & make any necessary revisions
* LMS Stats including May training registration numbers
* Review PUC Sub Rule 25.43 for the Mass Transition module outline
* Continue development of Mass Transition course module
* Review logistics for May training

**Following meetings… Tuesday, April 30th @ 2:30 pm Oncor offices for run through of training**

**… Friday, May 3rd @ 9:30 – 12:00 Oncor offices**

Meeting adjourned at 1:40 pm