RMTTF MEETING NOTES

THURSDAY, April 4th, 2019

ERCOT MET CENTER, ROOM 103

9:30 AM

Sheri opened the meeting and read the antitrust.

Attending in person:

Sheri Wiegand TXU

Jim Lee AEP

Kathy Scott Centerpoint Energy

Art Deller ERCOT

Tomas Fernandez NRG

Diana Rehfeldt TNMP

Call in:

Debbie McKeever Oncor

Carolyn Reed Centerpoint Energy

Crystal Luna Stream

Theresa Rodriguez Stream

Meeting notes from March meeting were reviewed and approved.

**LMS Stats for Marketrak**

* 268 in progress
* 653 complete
* 921 total

This year to date

* 12 in progress
* 14 complete
* 26 total

RETAIL 101 – stats were unavailable but will be added on a regular basis at our monthly meetings.

**Registration Numbers**:

*Dallas Training May (Oncor)*

Max able to attend: 50

Retail 101 48 registered and approx. 10 presenters including ERCOT

TX SET 50 registered and approx. 10 presenters including ERCOT

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

Max able to attend: 60

Retail 101 15 registered and approx. 10 presenters including ERCOT

TX SET 13 registered and approx. 10 presenters including ERCOT

ACTION: Sheri to send out a follow up market notice to same listserves:

* Reminding to cancel if unable to attend – provide # on waitlist
* Parking garage behind the building or nearby surface lots
* Continental breakfast and lunch will be provided

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

Art:

1 laptop

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:

Second laptop & will check for syncing both screens in room

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

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

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

**TX SET Presentation Revisions**

Confirmed earlier changes from notes

ACTION: Sheri & Jim to create an intro slide defining Mass Transition – new slide 84

**TRAINING PLAN**

Art explained Retail 101 is scheduled for ‘revamping’ in June. He is deciding if it will be a full revision where Relationships and History sections will be moved to new ERCOT classes: ERCOT Foundations and Market Participant Relationships.

If this is the case, the TF suggested ramping up coverage of MTs in Retail 101 and describing more specifically some of the uses for MT such as:

* IAGs
* Usage & Billing issues
* Switch Holds – tampering and DPPs

ACTION: At June’s meeting, Art requested TF provide him a list of topics for consideration in Retail 101.

The TF agreed MT/IAG Training still needed to be offered. Date is TBD.

**Mass Transition Module**

WG continued development of the outline (see attached). The scope was revised to not focus on the details of 25.43, but more on the operation side of what occurs during a transition. The TF revised the outline up through roles and responsibilities. Will continue development at the next meeting.



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

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

Tuesday, April 30th – setting up room and review logistics

Friday, May 3rd –

1. LMS Stats including Retail 101
2. Review feedback from training – what is available & make any necessary revisions
3. Update on registration #s for Houston training
4. Discuss overall training plan
5. Continue development of Mass Transition outline

Meeting adjourned at 2:00 pm