RMTTF

October 8th, 2020

WebEx only

9:30 am

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Attendees:

Tomas Fernandez, NRG Eric Blakey, Just Energy

Kathy Scott, Centerpoint Debbie McKeever, Oncor

Diana Rehfeldt, TNMP Jordan Troublefield, ERCOT

Sheri Wiegand, TXUE Bill Kettlewell, ERCOT

Jim Lee, AEP

Debbie opened the meeting reading the Antitrust Admonition.

Minutes from 9/3/2020 were reviewed and approved.

**Follow up on ACTION items:**

* Debbie has reached out to Ted on the best way to handle training for new market participants prior or during flight testing. Debbie indicated the training classes are not mentioned in FlighTrak and unsure if they are discussed by Client Services at the time of registration. TF will keep this as an open item.

**LMS Stats**

|  |  |  |  |
| --- | --- | --- | --- |
| **LMS Stats** | In Progress | Complete | Total |
| MT YTD | 33 | 60 | 93 |
| MT All Time | 334 | 779 | 1113 |
| Retail 101 YTD | 152 | 95 | 247 |
| Retail 101 All Time | 773 | 340 | 1073 |

MT All Time is up 5 and Retail 101 All Time is up 30 participants.

**Mass Transition Module Review**

TF reviewed the on-line module. All suggested revisions from last month were implemented. A few minor tweaks were suggested.

Slide 1.6 leave the link on a little longer so participants can capture the info if needed

Slide 1.12 – add 814\_14 in () on first bullet

Slide 1.16 Transactional flow – make the MP boxes larger to align arrows

ACTION: ERCOT will make the changes, send to leadership to review and then post. They will also draft a market notice announcing the launch of the new Mass Transition module. It is expected this should be complete by the end of October. (Matt is currently on vacation)

**RMTTF Training Plan 2020**

Understanding we are not sure when F2F training may be an option, the following was proposed:

|  |  |  |
| --- | --- | --- |
| **Training Plan 2021** | | |
| Class | Date | Location |
| RETAIL 101 | Tues, Jan 19th | WebEx |
| MT & IAG | Tues, Jan 26th | WebEx |
| **Plan A** | | |
| MT & IAG | Tues, Mar 30th | Austin - F2F |
| TXSET | Wed, Mar 31st | Austin - F2F |
| **Plan B** | | |
| RETAIL 101 | Tues, Mar 30th | WebEx |
| MT & IAG | Wed, Mar 31st | WebEx |

Plans are still for May training in Dallas and September training in Houston. Plans will be discussed F2F activity resumes.

ACTION**:** Bill will confirm dates for Q1 with Art/ERCOT.

**NEXT MEETING – November 5th is cancelled.**

ACTION: Debbie will communicate with Suzy the meeting has been cancelled.

**Review of MT on-line modules for accuracy**

ACTION: TF members were assigned the following modules to review for accuracy and offer any updates at the December meeting.

Usage & Billing – Sheri

IAG – Tomas

Email and Notifications – Tomas

Switch Holds – Jim

DEVS – Kathy

Siebel Change – Kathy

Bulk Inserts – Kathy

Administration – Debbie

Reports – Debbie

Overview – Debbie

Other D2D – Debbie/Kathy

Cancel w/ Approval – RMTTF at the next meeting

**MT &IAG Training Deck**

Kathy noted there were a few corrections on the deck from what was observed at the last training class.

ACTION: Sheri will also update the Reporting piece on IAG with current information prior to next training in January.

**Proposed Meeting Dates for 2021**

Jan 15th , Friday , WebEx only

Feb 4th, Thursday

Mar 4th, Thursday

Apr 1st, Thursday

May 6th, Thursday

Jun 3rd, Thursday

July 16th, Friday

Aug 5th, Thursday

Sep 2nd, Thursday

Oct 7th, Thursday

Nov 4th, Thursday

Dec 2nd, Thursday

Meetings are proposed to be F2F if approved

**Proposed Agenda for 12/3/20**

1. Review LMS Stats
2. Review 2021 Training Plan
3. Review MT/IAG training deck for revisions/updates
4. Discuss MT on-line module review