RMTTF MEETING NOTES

Wednesday, May 5th, 2021

9:30 AM

WEBEX ONLY

Debbie opened the meeting and read the Antitrust

INTRODUCTIONS OF THOSE ATTENDING:

* TOMAS FERNANDEZ NRG
* SHERI WIEGAND TXU
* Art Deller ERCOT
* JORDAN TROUBLEFIELD ERCOT
* JIM LEE AEP
* KATHY SCOTT CENTERPOINT
* DEBBIE MCKEEVER ONCOR
* Carolyn Reed Centerpoint
* Diana Rehfeldt TNMP
* Marina Grady Oncor
* Steven Pliler TXU
* Matt Tschetter ERCOT

Meeting Minutes from April 1st were approved.

LEARNING MANAGEMENT SYSTEM STATISTICS

LMS STATS WERE PROVIDED BY ART WHICH INCLUDED:

|  |  |  |  |
| --- | --- | --- | --- |
| **LMS WBT Stats** | In Progress | Complete | Total |
| MT YTD | 33 | 35 | 68 |
| MT All Time | 399 | 855 | 1254 |
| Retail 101 YTD | 88 | 41 | 129 |
| Retail 101 All Time | 850 | 404 | 1254 |
| Mass Tran YTD | 19 | 27 | 46 |
| Mass Tran All Time | 19 | 27 | 46 |

UPCOMING RETAIL MARKET TRAINING CLASSES REGISTERED ATTENDEES

ALL VIA WEB-EX

RETAIL 101 26 REGISTERED FOR June 8th

MARKETRAK-INADVERTENT GAIN 8 REGISTERED FOR June 15th

Art plans to send the ERCOT training notice in another week. ACTION: Sheri will piggyback the ERCOT notice with a catchy phrase as “Interested in learning more about Inadvertent Gains and reducing escalations?”

MARKETRAK MODULES REVIEW

Marina Grady with Oncor presented some suggested revisions for the following on-line MarkeTrak modules:

**Additional Day to Day Subtypes Module**

**Siebel Change:** when the TDSP submits the MT, REPs need to note approval in comments before ERCOT will complete the change to the Siebel system. Many REPs are simply closing MTs not noting approval. On the module, Matt will add another bullet to the ‘complete’ bubble stating “note approval in comments”. Matt will have Kim perform a voice over on the script. NOTE for TDTMS: suggestion for new workflow with “agree” button to transition MT back to submitter.

**Projects:**  the volume of Projects subtype has increased recently due to use for meter cycle change requests. The third bullet “Today, it is rarely used” will be omitted. It was also noted that one of the MT enhancements is for the creation of a new subtype “meter cycle change requests”.

**Other:** the checkpoint question presented a duplicate response “questions pertaining to 997 reports” is listed twice. This will be removed.

**MarkeTrak Overview Module** Marina suggested adding clarity that “each subtype has its own set of applicable states and transitions” after transitions is defined. Matt will make the change and Kim will perform voiceover for script.

MARKETRAK/IAG TRAINING

* Reminder that the agenda has been revised to move topics ‘Siebel Change to Reporting” to right after lunch/Switch Holds based on comments received from last training. Participants were very engaged on IAG training sections, then participation declined on the last few sections. By moving, this will also allow the flexibility to cover some material prior to lunch if finish Switch Holds early.
* After training on June 15th, the TF will decide if the training needs to be broken down into two half days -MarkeTrak and Inadvertent Gains
* All modifications listed on 4/1/21 notes were completed
* Tomas rearranged slides with new agenda and forwarded presentation deck to Art
* ACTION: Debbie will rearrange the agenda/presenters/slide numbers and forward to team

TXSET WBT Training

Art is working on development of TXSET WBT module: resorting slides and scripting.

TXSET ILT – WEBEX ONLY

* With the consideration that in person instructor led training is not likely to occur in 2021, the TF will begin consideration of modifying ILT presentation to WebEx only.
* Art suggested all posterboards and props will need to be considered as on-line materials.
* TF will review the latest TXSET presentation at the next meeting, June 3rd.

DRAFT AGENDA for 6/4/21

* LMS Stats
* Enrollment for ILT WebEx training – June 8th & 15th
* TXSET ILT – WebEx development
* TXSET WBT development
* Other Business – collaboration with RECTF on Mass Transition Module modifications