RMTTF Meeting

Wednesday, October 5, 2022

1:00 PM

ERCOT, Building E, Conference room 119

RMTTF MEETING NOTES

Tomas opened the meeting, welcomed everyone and proceeded with reading the Antitrust Admonition.

**Introductions:**

* Sheri Wiegand TXU/Vistra
* Bill Snyder AEP
* Jordan Troublefield ERCOT
* Eric lotter Grid Monitor
* Kathy Scott Centerpoint
* Monica Jones Centerpoint
* Tomas Fernandez NRG
* Melenda Earnest AEP
* Art Deller ERCOT
* Debbie McKeever Oncor

**Agenda Review**

Tomas reviewed the agenda. No questions were asked. No changes were made.

**Finalize Meeting notes from last meeting**

Meeting notes were not posted so those will be reviewed at the next RMTTF meeting.

**ERCOT Learning Management System (LMS) Statistics**

Tomas went through the numbers for each listed below. The numbers were provide today by Art Deller, Manager of Training for ERCOT.

|  |  |  |  |
| --- | --- | --- | --- |
| **LMS Training** | In Progress | Complete | Total |
| MT YTD | 54 | 152 | 206 |
| MT All Time | 502 | 1064 | 1566 |
| Retail 101 YTD | 179 | 95 | 274 |
| Retail 101  All Time | 1197 | 597 | 1794 |
| Mass Tran YTD | 9 | 19 | 28 |
| Mass Tran All Time | 39 | 63 | 102 |
| Texas SET YTD | 31 | 25 | 56 |
| Texas SET All Time | 31 | 25 | 56 |

Art spoke to some of the numbers explaining why the numbers are higher or lower. It was noted that the numbers are low for the Mass Transition module but Art mentioned that the module is fairly new. Art stated that the modules are well used. Tomas mentioned that we should all continue to communicate that the modules are available.

Art noted that the Retail 101 is something that is taken regularly. The count for the Retail 101 class which was held on September 28 was 60. Art said that ERCOT tries to keep the classes around 30 but he will go higher for Retail 101. Usually he keeps the classes that have “breakout sessions” to 30 or less.

Art and others stated the web-based training is still very popular. High numbers still being experienced. The instructor led training is not as popular as the module training for the same subject.

For Wholesale training, ERCOT has instructor led classes and also web based modules supporting the same training. Art is modifying some of the modules and class materials to contain less overview type info and info more critical to the process. Will do that for Retail 101 too.

**Survey Results for Retail 101 instructor led class held September**

60 attendees

9 or 10 completed the survey

Attendees were across all of the Market Participant types. Highest were LSE and TDSPs.

Survey comments (except for one) were positive.

The one comment was not positive; Survey question: “How can we improve? Response: “It was a little dry”.

Art and Lloyd Pritchard were the instructors for the Retail 101 training.

The class adjourned at Noon which was one of the shortest Retail 101 classes.

Art said he is revising the Retail 101 and aiming for about half the existing deck. The goal is for Retail 101 to end at lunch. This would be for each of the Retail 101 training classes next year.

The plan is to pull some of the preliminary info out and include in the ERCOT Foundations online module. The ERCOT Foundations module is being rewritten so Art explained that this is a good time to do that.

Tomas mentioned that for the Course recommendations, eventually we are “creating a journey”. Market History, what comes next and eventually TX SET. Sheri mentioned there is a matrix that supports that.

**Marketrak training to support SCR815, Marketrak Administrative Changes**

Two training classes have been planned.

* November 16 – during TDTMS, 9:30 AM
  + See the ERCOT Meeting page for webex info.
* November 30 – no time determined

SCR815 includes significant changes for the Rolodex. Currently it’s not usable in its current state. Contains old information and in some cases no information. Changes for the Rolodex are seen as positive and it’s expected that people will begin using the Rolodex.

To get the info out about the Rolodex, was mentioned that Tammy could send an email to each Marketrak administrator noting the change bc ERCOT has all the Marketrak Administrator contact information. Each MP has to designate a Marketrak Admin and this is done using the NCI form (Notice of Change of Information) which is in ERCOT Protocols.

Action item:

Sheri to address this at TDTMS and can see what ERCOT thinks can be done. Next TDTMS meeting which is October 20th. Sheri stated that Kyle will be moving the TX SET meeting to the afternoon on the 20th.

**2023 Plans for Retail Training**

Suggestion was to bring back instructor led training for TX SET and offer multiple times per year. Offer via webex.

For 2023, since TX SET 5.0 is going in first quarter of 2024, a class supporting the current version (TX SET version 4.0 A) doesn’t need to be scheduled for the Fall of 2023.

Also the presenters having to attend in person trainings, an additional class would add another day they are unable to be in the office to complete their usual work.

* **Retail 101 Instructor Led Training:**
  + Will be provided 3 times next year.
  + Will follow the flight schedule as usual.
  + Note! The 2nd flight for 2023 will be dedicated solely for LP&L testing,
    - Limited to Certified CRs
    - Will only include LP&L Muni – note! LP&L is the entity being tested
    - Will not include TDSPs
    - Will not include new CRs
* Suggest dates for Retail 101 Training:
  + End of January
  + Mid-May
  + September
* **Marketrak Instructor Led Training:**
  + Currently the training is 2 half days. That will continue in 2023.
  + Marketrak will continue to be held web-ex only
  + Presenters will continue to be in person at ERCOT. This minimizes technical issues.
* Suggested dates for Marketrak Instructor Led Training:
  + February
  + End of July – last session planned for 2023
  + March of 2024 will be the first session after implementation of 5.0
* **TX SET Instructor Led Training:**
* Maybe just two sessions in 2023
* Space 6 months apart, maybe the end of March and sometime in August.
* Note! Easter is April 9th. We will avoid that week and avoid mid-March bc of Spring break.
* Planned dates for instructor led TX SET classes:
* March 29th - Dallas –
* Action item: Debbie and Sheri to find a location for TX SET training in Dallas.
* September 20 in Houston - Centerpoint to host

**Discussion for creating training for parties interested in operating in Lubbock**

Debbie brought up that there are a lot of questions from current MPs and potential CRs about operating in the Lubbock territory and it would be beneficial to have some sort of training that includes items CRs and new CRs need to know or if there are differences between LP&L as a Muni, operating as a TDSP (and not Muni). So far one item was noted as being different (processes for how the apt management/change of tenant works in LP&L verses CSA).

Some of those interested in knowing more aren’t aware they need to test or that there are requirements for being certified as a CR. This could be training RMTTF develops.

Suggestion was made for those asking questions to be directed to attend LRITF bc that’s where the info is discussed and if they want to be engaged they should attend those meetings. Doesn’t need to be training bc it is work being done in LRITF. There’s value in providing some info to those trying to understand what is needed and when as well as the process and requirements of LP&L entering the Market. Not everyone can attend the LRITF meetings.

Question was asked about when the activities list would be complete and could it be complete by December 7. That date is important because it’s the deadline to register for the first flight of the year. Since only certified CRs will be allowed to participate in the Lubbock Test Flight… that those intending to operate in the LP&L territory, right after LP&L is certified, they will need to test in the first flight of 2023, and otherwise they will need to wait until the last flight of the year.

Debbie suggested that a group could draft a notice about how the 2nd test flight of 2023 is dedicated for Lubbock and will not include testing for new CRs. Notice could also include the requirements and restrictions for testing. SET is working on the scripts.

Tomas thought a ppt could be done similar to the ppt given during the Summer Preparedness workshop because the ppt brought it “all together” and said it could be a workshop for probably 2 to 3 hours. Debbie said she thought it could possibly be done in an hour.

Sheri said that the LRITF webpage should be where all of the associated documentation should reside, similar to Sharyland.

If it’s determined that a workshop/update is needed, that could be during an LRITF meeting and be given after the activities list is complete or as soon as we know the answers to how each item will be handled. Some of the items may not be known until later and maybe some even after LP&L is in the Market. Maybe provide the update (or workshop) as late as 2 weeks before Choice.

After much discussion it was thought some communication should be provided about testing restrictions and maybe later a workshop or update with the info could be done as part of an LRITF meeting or separately. Announcing it as “training” won’t draw the same as a “workshop”. Sheri would bring this up at LRITF and go from there.

**Upcoming meetings**

* November meeting will be cancelled.
* December RMTTF meeting will be held via Web-ex only on December 1.
* Note! December 6th is RMS

Agenda Items for the next RMTTF meeting:

* RMTTF Meetings for next year
* Review and finalize last 2 sets of Meeting Notes
* Review surveys from MarkeTrak training
* TX SET Training
* Review past presenters sections for each presenter
* Review slides and begin noting slides that will need to be changed to support TX SET 5.0
* Goals and Accomplishments

**Other Business**

ERCOT will be changing the LMS in November. All users will need to create a new login. There are a lot of benefits to the change, mostly on the backend for ERCOT.

May need a communication to the market about needing a new login for the LMS.

Meeting adjourned at 3:18 PM