RMTTF Meeting

Thursday, March 2, 2023

9:30 AM

Melinda Earnest opened the meeting and welcomed everyone and proceeded with reading the Antitrust statement.

Jordan displayed the Agenda.

Agenda Review

Melinda read the agenda and no agenda changes were requested. Agenda stands as is.

Meeting Notes from the last meeting

Melinda asked if there were any changes.

Introductions

Melinda went through the names on the webex.

* Amy Sue Stirland Lubbock
* Diana Rehfeldt TNMP
* Debbie McKeever Oncor Electric Delivery
* Melinda Earnest AEP
* Jordan Troublefield ERCOT
* Kathy Scott Centerpoint
* Monica Jones Centerpoint
* Art Deller ERCOT
* Tomas Fernandez NRG

LMS Statistics from ERCOT

Art mentioned that there were 7 that completed the Mass Transition online training which was good. That has been one of the least used modules but only came out last year.

LMS numbers are as of 3-1.

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| --- | --- | --- | --- |
| **LMS WBT Stats** | In Progress | Complete | Total |
| MT YTD | 28 | 17 | 45 |
| MT All Time | 581 | 1101 | 1682 |
| Retail 101 YTD | 70 | 27 | 97 |
| Retail 101 All Time | 1337 | 673 | 2010 |
| Mass Tran YTD | 2 | 5 | 7 |
| Mass Tran All Time | 48 | 76 | 124 |
| Texas SET YTD | 9 | 8 | 17 |
| Texas SET All Time | 51 | 37 | 88 |

Survey results from Marketrak Classes

Marketrak 2 half day sessions were held:

* February 1 Marketrak Part 1 class
* February 2, Marketrak IAG/Switch Hold

Art noted attendees were a combination of TDSP, ERCOT and LSEs

Q3 How did you hear about this course?

* 56% - Market Notice
* 31.5% - Referral
* 6.25% - ERCOT LMS
* 6% - ERCOT.com

Responses were very positive.

Amy explained that there could be more steps included for the processes. She took the training and had to rely on her notes a great deal to create an issue.

Debbie said that was good to know since RMTTF creates the presentations so they can be used as reference material. When we redo the presentations for MarkeTrak to support TX SET 5.0, we will see what changes can be made.

Bulk Insert Online Module and Inadvertent Gain Module

RMTTF needs to be revise the two Bulk Insert and Inadvertent Gain Modules to add statements consistent with the RMGRR\_\_\_

Below language will be added to bottom of slide 1 on each of the modules.

Neither of the scripts for the modules need to be changed.

*Bulk Inserts may only be used for submission of multiple IAGs for the same customer or in cases when a system processing issue occurred only with proper notification*

TX SET Presentation Revisions

Several slides were changed during the meeting to align the presentation with the current data on ERCOT.com

Tomas said he will get some screen shots and send to Art.

Kathy and Diana updated the TX SET WG slides.

TX SET Presenters

The list of presenters for the slides were reviewed and revised.

Diana plans to be in attendance in person in May when the training is hosted.

If she is unable then Kathy will present for her.

Kathy needs the ppt ASAP so she can turn over to her team that will be doing the printing.

Each presenter should review their slides and send to RMTTF leadership. Tomas will make the changes to the slides and send to the presenters.

Assignments to support the TX SET Training hosted by Vistra in May

Sheri-Vistra hosting

Debbie – index cards, large candy bars for the winners to the checkpoint questions.

Kathy – Training books, props

Melinda – hard candy for the tables

Tomas-laminated sheets for the “fill in the dots” transaction exercise, sheets for team exercise, dry erase markets, laminated sheets-#43

Sheri- TX SET Inventory Card

AEP, ONCOR, CENTERPOINT to share the cost of food for the training.

Other Business

Debbie asked if Art had decided on dates for Retail 101 Summer class and Retail 101 in the Fall.

Art said yes and provided the dates. August ?and November ?

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| --- | --- | --- | --- |
| Class | Training Date  | Location | Notes |
| Retail 101  | January 26th, Thursday | WebEx only | ERCOT instructors, RMTTF support |
| MarkeTrak Part I | February 1st, Wednesday | WebEx only | Instructors will meet in Dallas @ Oncor |
| MarkeTrak Part II | February 2nd, Thursday | WebEx only | Instructors will meet in Dallas @ Oncor  |
| TXSET  | May 4th, Thursday | Dallas @ Vistra | RMTTF will be held 5/5 in am |
| MarkeTrak Part I | June 7th, Wednesday | WebEx only | Instructors will meet in Austin @ ERCOT |
| MarkeTrak Part II | June 8th, Thursday | WebEx only | Instructors will meet in Austin @ ERCOT |
| Retail 101 | August -  TBD | WebEx only  | ERCOT instructors, RMTTF support |
| TXSET | September 27th, Wednesday | Houston @ CNP | RMTTF will be held 9/28 in am |
| Retail 101 | October – November – TBD | WebEx only | ERCOT instructors, RMTTF support |

Art said that ERCOT has been able to obtain a method for adding upcoming trainings to the new Cornerstone/LMS System and those will be added soon.

Upcoming April meeting, Tomas will be Chairing and in May Debbie will be Chairing.

Debbie to send Amy a draft Agenda for the June RMTTF meeting. This will help those get approval for travel. This is a requirement for some companies.

Meeting adjourned at 12:11 PM