RMTTF Meeting

December 7, 2023

9:30 AM

WebEx Only

Melinda Earnest opened the meeting, welcomed everyone and proceeded with reading the anti-trust statement.

**Agenda Review**

Melinda reviewed the meeting agenda for today.

No questions were asked

No changes were made.

**Attendees**

* Melinda Earnest AEP
* Debbie McKeever Oncor
* Jordan Troublefield ERCOT
* Art Deller ERCOT
* Eric Lotter Grid Monitor
* Lysette Balance Centerpoint
* Diana Rehfeldt TNMP
* Amy Sue Stirland LP&L
* Kathy Scott Centerpoint
* Monica Jones Centerpoint

**Meeting Notes**

Meeting notes from the last meeting were reviewed.

No changes were made.

No comments received.

Meeting notes are considered final.

**LMS Stats**

Art provided the LMS stats and explained the current numbers which included some small increases.

It was noted that Retail 101 is a module in high demand.

Retail 101 online module may need to be reviewed and possibly updated for TX SET 5.0. ERCOT is reviewing the modules. Tammy has asked for the scripts from Art. She will be providing needed updates to the MarkeTrak online modules.

We should keep up with the dates for the MarkeTrak training.

Kathy attends TX SET and can give an update at the RMTTF meetings.

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| LMS WBT Stats | In Progress | Complete | Total |
| MT YTD | 55 | 130 | 185 |
| MT All Time | 608 | 1214 | 1822 |
| Retail 101 YTD | 318 | 223 | 541 |
| Retail 101 All Time | 1585 | 869 | 2454 |
| Mass Tran YTD | 8 | 25 | 33 |
| Mass Tran All Time | 54 | 96 | 150 |
| Texas SET YTD | 40 | 37 | 77 |
| Texas SET All Time | 82 | 66 | 148 |

**Upcoming TX SET Training**

TX SET 4.0a training will be held in Dallas at the Oncor building at 1616 Woodall Rodgers Fwy, 1st floor.

Training has been posted on the ERCOT LMS site.

Art said that to date, only 1 has registered.

**Retail Training 2024**

ERCOT Retail Training dates for 2024 are planned as noted. Additional training can be scheduled if needed. All listed are Instructor Led and each is noted whether it is WebEx only or in person only.

MarkeTrak part 1 and 2

Instructor led – WebEx only – both days

March 6, 8:30 AM – part 1 - overview

March 7, 8:30 AM – part 2 – Switch Hold and Inadvertent Gain

Note! RMTTF meeting will take place on March 6, 1:30 PM after MarkeTrak training, in person and also WebEx.

TX SET 4.0a – two training classes are scheduled. Since TX SET 5.0 will be implemented in the Fall of 2024, a 3rd class for 4.0a will not be held. Should be included in the training notice.

TX SET 4.0a - February 8th at Oncor, 8:30 AM

Instructor led – In person only – no WebEx – full day class

Note! RMTTF meeting will take place on February 9 at Oncor at 9:30 AM, in person and also WebEx.

TX SET 4.0a – May 2, at Centerpoint

Instructor led – In person only – no WebEx

Note! RMTTF meeting will be take place on May 3 at Centerpoint at 9:30 AM, in person and also WebEx.

RMTTF meetings

Thursday, January 11

February 9

March 6

April 4

May 2 TX SET training

May 3rd RMTTF meeting

June 6

August 8

September 12

October 10

November 7

December 12

Training that needs updating to support TX SET 5.0 and Marketrak

Tammy is still working on testing for the MarkeTrak system changes as included in SCR817.

She will provide a market training session via WebEx in late march or early April.

She will also update the user guide which will be complete before the training session.

Goals will be addressed at the January RMTTF meeting.

Debbie and Melinda will pull together the accomplishments from 2023 and those will be reviewed at the January meeting.

Goals and Accomplishments

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| Facilitate Retail 101 training classes by providing SME support for ERCOT led instruction. Classes to be offered three times a year and aligned with TXSET Retail Market Flight schedule. |
| Conduct, coordinate and Present MarkeTrak and Inadvertent Gain/Switch Hold instructor-led training, at least three times per year. |
| Update, Conduct and Present TX SET Instructor-led training. |
| Expand ERCOT market notifications and increase communications for training courses targeting the Retail Market. |
| Develop and modify training materials to maintain consistency with Retail market changes as included in:   * NPRR1095, TX SET 5.0 Changes and associated TX SET Implementation Guides * SCR817, Related to NPRR1095, MarkeTrak Validation Revisions Aligning with TX SET V5.0 |
| Collaborate with RMS, RMS Working Groups to develop new and modify existing market documentation (i.e. user guides, process flows) |

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| **Review feedback (survey results and comments during Instructor Led training) from all training sessions and modify training materials as warranted.** |
| Support enhancements for ERCOT’s new Learning Management System “Cornerstone” as applicable |

**Assignments for February TX SET Training at Oncor**

Name tags and markers - Kathy

List for security – Art to provide to Debbie on Friday, February 2nd

Pens – Melinda

Books – Kathy and will provide the swim lanes

Only put 2 slides per page in the books

Laminated sheets – Tomas has those and will be reused from last time. Kathy has some too.

Answer key – Melinda

Hard candy – Melinda

Room set up – Debbie for 40 attendees and instructors are additional.

Instructors: Tomas, Melinda, Kathy, Monica, Sheri, Debbie

Candy bars for prizes – Debbie

Index cards – Kathy

Lunch by TDSPs – AEP, Centerpoint, Oncor Electric Delivery

No other business