RMTTF Meeting

Friday, February 9th

9:30 AM

WebEx and In person

Oncor Electric Delivery

1616 Woodall Rodgers Fwy.

Conference room 106

Jordan Troublefield with ERCOT opened the meeting, and proceeded with reading the anti-trust statement.

**Nominations**

Jordan asked for nominations for 2024 RMTTF leadership.

Sheri Wiegand with TXU nominated (via chat) the 3 listed below which are also the current RMTTF Leadership Co-Chairs:

* Tomas Fernandez NRG
* Melinda Earnest AEP
* Debbie McKeever Oncor

Each accepted the nomination.

Jordan asked if there were other nominations.

There were no other nominations.

All were elected by affirmation and will serve as RMTTF leadership for 2024.

Tomas proceeded with the meeting and welcomed everyone.

**Agenda Review**

Tomas reviewed the meeting agenda for today.

No questions were asked

No changes were made.

**Today’s meeting Attendees Company Designation of attending either in person or webex**

* Melinda Earnest AEP Texas In person
* Debbie McKeever Oncor In person
* Jordan Troublefield ERCOT WebEx
* Art Deller ERCOT WebEx
* Eric Lotter Grid Monitor WebEx
* Amy Sue Stirland LP&L WebEx
* Kathy Scott Centerpoint In person
* Sheri Wiegand TXU WebEx
* Tomas Fernandez NRG In person
* Monica Jones Centerpoint WebEx
* Amy Sue Stirland LP&L WebEx
* Jesse Macias AEP Texas WebEx
* Bill Snyder AEP Texas WebEx

**January Meeting Notes**

Tomas mentioned that Meeting notes from January RMTTF are posted to today’s meeting page.

Meeting notes were reviewed today.

None of the co-Chairs received requests for changes.

No changes were made.

Meeting notes are considered final.

Reminder that leadership should submit meeting materials for posting 7 days in advance.

If you need:

• To post WG/TF items to the WG/TF landing page - send to Market Support Services

• To schedule WG/TF meeting – send request to Stakeholder Services

• To post WG/TF items to the RMS meeting page – send request to Stakeholder Services

Email addresses for those are listed below.

marketsupportservices@ercot.com

stakeholderservices@ercot.com

If sending an email to the RMTTF ERCOT email list, the format is as example below.

rmttf@lists.ercot.com

**ERCOT Learning Management System Stats**

The latest numbers below were reviewed which were provided by Art, this morning.

|  |  |  |  |
| --- | --- | --- | --- |
| As of 2/9/2024 |   |   |   |
| **LMS WBT Stats** | In Progress | Complete | Total |
| MT 2024 | 2 | 10 | 12 |
| MT All Time | 612 | 1229 | 1841 |
| Retail 101 2024 | 27 | 25 | 52 |
| Retail 101 All Time | 1623 | 904 | 2527 |
| Mass Tran 2024 | 2 | 4 | 6 |
| Mass Tran All Time | 57 | 101 | 158 |
| Texas SET 2024 | 2 | 3 | 5 |
| Texas SET All Time | 85 | 70 | 155 |
|   |   |   |   |

Art provided the list of upcoming instructor-led courses, date and number registered as of today.

 All listed are WebEx only.

* Retail 101 Wednesday, February 21     51
* MarkeTrak Pt 1 Wednesday, March 6    3
* MarkeTrak Pt 2  Thursday, March 7     1

Art mentioned that the count for MarkeTrak is low compared to previously classes. RMTTF discussed how to boost the numbers. Maybe they are not aware of the training. The notice was just sent out recently.

It was decided that RMTTF will send out a notice for the training and encourage people to register. Will be done soon.

Team noted once again, that the Retail 101 module is still in high demand. Numbers continue to grow.

**TX SET 4.0a Instructor Led Class held February 8**

* All attending RMTTF today voiced that they thought the training went really well.
* The trainees did get excited about the interactive group activities and seemed to enjoy.
* Some struggled in the group activity but they were able to finish.
* There were some good questions.
* There were good comments from the trainees throughout the training.
* Few technical issues but they didn’t stop us or slow down our progress.
* The facility is a great place for the interactive training.
* Oncor did a great job. Many thanks to Debbie and Oncor

**Survey results for the TX SET 4.0a Training held at Oncor on 2-8**

 There were 17 that responded to the survey. Not all answered every question.

Survey included:

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| --- |
| **INITIAL SURVEY STATEMENTS FOR RATINGS**  All responded with “5 – strongly agree” The course provided knowledge and /or skills that apply to my job. 100% STRONGLY AGREE The course material was presented in a clear and engaging manner. 100% STRONGLY AGREE I would recommend this course to others. 100% STRONGLY AGREE |
| **WHAT DID WE DO WELL?**1 Good visual understanding of Market Transactions. 2 Lot of resources and materials. I enjoyed it. 3 EVERYTHING! 4 All of the facilitators provided clear explanations and provided great material. 5 Formatted/structured well and the speakers were engaging. 6 All 7 Interactive parts were great. Breaking it up with standing and breaks. 8 I love the interactive with the class. 9 Good visual understanding of Market Transactions. 10 Great job at keeping everyone engaged. 11 Good visuals. Good workbook! 12 Great engagement! 13 Good flow and pace of knowledge. Great job. Thank you!  |
| **HOW CAN WE IMPROVE?**1 The slides felt a little long but the again there was a lot to cover. I honestly don’t know if its possible to reduce time and maintain understanding.2 DON'T KNOW IF IT'S POSSIBLE TO IMPROVE! The course was presented in an engaging manner, in an environment that was conducive for learning, and by instructors that were very knowledgeable and also very different from one another (the contrast in personalities and styles helped keep the content fresh).  DEFINITELY SHOULD KEEP THIS COURSE IN PERSON AND NOT WEB-X! THANK YOU VERY MUCH!3 Nothing keep doing what you are. I enjoyed it a lot! 4 Update slide 27 as there isn't an 868\_03. Great interactive segments. 5 Na 6 I can’t think of anything. I enjoyed it overall. 7 Slightly more clarity in the exercises. For instance, when drawing the swim lanes perhaps have a number of lines to be drawn in the title8 Lose the swim lanes and provide the deck slides for the scenarios 2/8/2024 4:03 PM |
|  |
|   |

**Confirm Marketrak Training Materials are correct and posted**

There is a current presentation posted on the registration page, however it doesn’t include the latest slide of numbers for the historical number of MarkeTrak issues.

Sheri will try to update those so they can be added to the current ppt.

The training notice from RMTTF will not be sent until after the new ppt is posted on the registration page. When the training notice is sent from RMTTF, it will include the link to the page to register so it’s important the latest ppt be posted. We don’t want an incorrect/outdated ppt to be accessed when it won’t be used in the training.

**Status of MarkeTrak Orientation as discussed at TX SET and TDTMS**

There will not be a MarkeTrak training/overview provided by Tammy in the Spring as previously noted.

Reason is that the testing for the MarkeTrak system changes as included in SCR817 won’t be to the point they are fully ready by the Spring.

There are 3 activities and/or training for moving to implementation. Sheri provided a high-level description of each. RMTTF comments are below each. Kathy mentioned that at MCT, they will be working on a transition plan.

1. TX SET 5.0 Orientation – held by Kathryn Thurman in January

RMTTF COMMENT: May need a second training later in the year.

1. Transition plan – currently in development at TDTMS/MCT

SHERI’S COMMENT: Will define how MarkeTrak issues, transactions in progress, and maybe other items will be handled during the transition/cut over.

* 1. RMTTF COMMENT: Possibly include contingency plans (if issues are experienced following implementation)
1. MarkeTrak detailed training – maybe late September or early October.
	1. KATHY AND DEBBIE’S COMMENT: Needs to be sooner bc if there are issues, our IT groups need time to make changes.
	2. KATHY, MELINDA AND DEBBIE’S COMMENT: Need the WSDL for those with APIs “sooner rather than later”

Sheri provided an update that Tammy is attending TDTMS. The user guide revisions are being done per issue/section. IAG will be worked on next week.

The user guide updates will be complete before the training session.

Screen changes will be complete as well. Tammy will include the updated screens in the training.

 Sheri gave a breakdown of Tammy’s approach.

* + Finish the MarkeTrak User guide Tammy and TDTMS
	+ Leverage Updated User guide for online module changes Tammy, Art
	+ Leverage User guide, Updated modules for training materials RMTTF

There may be other items for RMTTF. Kathy and Sheri to keep us updated.

**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

Only one more TX SET 4.0a training class will be held. Will be in person, no WebEx. It’s thought that another 4.0a training class isn’t needed because TX SET 5.0 will be implemented the weekend of November 10th. Market Participants would not attend given 5.0 is so close.

Following the implementation of TX SET 5.0 and SCR817, after all is working properly without technical issues, there should be an in-person TX SET 5.0 training and MarkeTrak Training the following day.

This is our previous schedule for training, which will work well for a 2 day back-to-back…one day SET and the next MarkeTrak both full days and in person. Also hold the same training via WebEx, also 2 days.

Possibly hold the “Instructor led in person” training 3 times next year. Once in Austin, once in Dallas and once in Houston.

The final TX SET 4.0a Instructor led – In person only – no WebEx – full day class – details are below.

Thursday, May 2

Centerpoint Energy Plaza, 13th floor

1111 Louisiana St. Houston, TX 77002

Room will accommodate 60. Kathy said to keep registration at a maximum of 50 attendees. That will allow some space for the instructors and a few extra that may drop in or that didn’t register.

List of TX SET Instructors.

* Kathy Scott Centerpoint
* Monica Jones Centerpoint
* Melinda Earnest AEP
* Tomas Fernandez NRG
* Sheri Wiegand TXU
* Debbie McKeever Oncor

Registration for the Houston TX SET Training will be posted on the ERCOT LMS site next week by Art.

Note! RMTTF meeting will be take place on May 3 at Centerpoint at 9:30 AM, in person and also WebEx. May be the same room as the TX SET training.

**2024 Upcoming RMTTF meetings**

* March 6 1:30 PM In person at ERCOT and WebEx
* April 4 9:30 AM
* May 3 9:30 AM In person and at Centerpoint – address above
* June 6 9:30 AM
* August 8 9:30 AM
* September 12 9:30 AM
* October 10 9:30 AM
* November 7 9:30 AM
* December 12 9:30 AM

The November 7th date may change. It’s close to the implementation date for TX SET 5.0 and SCR817 which are both scheduled for the weekend of November 9th and 10th.

**2024 Goals**

2024 Goals – draft document was reviewed. All agreed the goals are encompassing of all RMTTF work. Slide needs to be revised to bullet some of the points.

Tomas volunteered to do that. Will be included in the RMTTF update to RMS as well as the RMTTF Leadership election and upcoming training.

**Draft Assignment list for MarkeTrak Part 1 and Part 2 training**

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| --- | --- |
| **Assignment** | **Responsible Party** |
| Reserve room for instructors at ERCOT | Debbie |
| Sheri to finish slide for MarkeTrak issues per year | Sheri |
| Verify version of presentation is the most recent | RMTTF |
| Before training starts, verify there’s no glare or anything that would distract attendees (This was in the January notes).  | Instructors |
| Check audio and visual  | Instructors |

**Draft Assignment list for May 2nd TX SET Training 4.0a at Centerpoint**

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| --- | --- |
| **Assignment** | **Responsible party** |
| Name tags and markers | Kathy |
| List of registered attendees for CNP Security | Art to provide to Kathy by ? |
| Pens | Melinda |
| Books and swim lanes  | Kathy |
| Laminated sheets for group sessions | Kathy – reusing from Feb 8th session  |
| Answer key  | Melinda |
| Hard candy | Kathy – leftovers from Feb 8th session |
| Candy bars | Debbie |
| Prepare training room  | Available instructors – meet an hour early |
| Coordinate facilities and logistics | Kathy  |
| Candy bars/prizes  | Debbie |
| Breakfast snacks, afternoon snacks | Kathy to coordinate |
| Lunch | Kathy to coordinate |

**Other Business**

Tomas noted the next RMTTF meeting will be March 6th at 1:30 PM, in person and also offered via WebEx.

**Adjourn**

Meeting was adjourned.