RMTTF Meeting

Friday, May 3, 2024

9:30 AM

Centerpoint Energy Plaza

1111 Louisiana

Houston, TX

Meeting offered via WebEx and In person

**RMTTF Meeting Notes**

Tomas Fernandez with NRG opened the meeting and welcomed everyone.

Tomas proceeded with reading the anti-trust statement.

**Agenda Review**

Tomas reviewed the meeting agenda for today.

No questions were asked.

No changes were made.

**Introductions**

Those in the room introduced themselves along with company.

Meeting Attendees Company

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

Attending via WebEx

* Jordan Troublefield ERCOT
* Amy Sue L LP&L
* Eric Broach NextEra Energy Retail
* Eric Lotter GridMonitor
* Angela Ghormley Calpine Corporation
* Bevill, Robert TNMP
* ERCOT Art Deller
* Sheri Wiegand TXU

**April 24th Meeting Notes**

Tomas asked Jordan to bring up the meeting notes from the April 24th meeting which are posted to today’s RMTTF meeting page.

April 24th meeting notes were reviewed.

None of the co-Chairs received requests for changes.

No one in the room requested changes.

Meeting notes are considered final.

**ERCOT Learning Management System Stats**

New counts were not provided today. Art will provide new counts at the next RMTTF meeting.

Art provided the count that 24 attended the Retail 101 WebEx training held on 5-1

**Feedback TX SET v4.0a training in Houston on May 2nd.**

40 registered attended the training, excluding instructors. Some drop ins filled in some of the spots. Some that signed up may not have attended due to the bad weather.

**Surveys – TX SET 4.0a – class held on May 2nd**

* Survey responses were reviewed during today’s RMTTF meeting.
* 36 took the survey.
* Majority of the training attendees were REPs, some TDSPs.
* Most heard about the class through market notice of ERCOT.com

Some very positive comments.

* + Liked the interactive group exercise.
  + Kept people engaged.
  + Liked the games.
  + Presentation was helpful.
  + Structured a variety of teaching skills.
  + Great class.

How can we improve?

* + “Some of the slides are hard to read” RMTTF comment - RMTTF is aware but that is why we provide the training books with 2 slides per page.
  + Maybe a bigger room for the group exercise.
  + Validate parking
  + Maybe the training could be free. Tomas explained that the training IS free but they were under the impression that their company would have to pay per person.

RMTTF discussion:

There were some questions regarding the reject scenario. RMTTF response is that it shouldn’t be changed. We want those attending to have to work through and discuss the transaction scenario to arrive at the correct answer.

Some provided feedback that there are those that attend the TX SET training as a “train the trainer” and some have a hard time understanding the scenarios.

Tomas and others thanked Centerpoint for hosting and AEP and Oncor for lunch.

**Status of the MarkeTrak User Guide**

Tammy is attending the TDTMS meetings and will be providing updates on the MarkeTrak User Guide. She is using those as a base to determine what changes are needed for the MarkeTrak modules. Once those are finished, RMTTF can modify the existing instructor led training presentation and materials.

The IAG changes have been proposed. Everyone should bring their comments to the next TDTMS meeting. Will most likely be held on May 21st.

The latest IAG section in draft/redline is posted on the March 12th TDTMS meeting page. Send our comments to Tammy directly. All other sections are being revised and some or all will be reviewed at the TDTMS May meeting.

The RMG Section 11 – Solution to Stacking - has been updated. See gray language. Will be effective 1st of December.

Current/ERCOT Operating rule 17: 814\_22 CSA – upon receipt of MVO, enrollment will be sent to CSA holder. – this is accurate and does not need a change.

Operating rule 13 – gray box language

At the next TDTMS meeting, Tammy will be giving an update regarding the training.

**Status of Transition Plan (MarkeTrak issues in process during cutover)**

Nothing has changed since the last RMTTF meeting.

The transition plan should be finalized at the next MCT, TX SET and TDTMS meeting(s).

Last update from ERCOT for changes to the MarkeTrak modules to be aligned with SCR817

6 modules need updating

5 almost complete

1 module will be finished after the 5. It’s IAG which is the largest one.

At the last RMTTF meeting, those in attendance agreed RMTTF should review the modules after they are updated. We will match the updated training materials to the modules.

**Discuss High level list of changes being made**

Some are in progress. We have been looking at these and understand there are some that will continue to change and overlap.

**Set Tentative Dates for Retail Training 2025**

* + 3 classes of Retail 101
  + 3 classes of MarkeTrak part 1 and part 2
  + 3 classes of TX SET 5.0

Some of the changes needed for the TX SET ppt can be done in a short of amount of time. We estimate not many slides will change. Maybe clarify some of the stacking rules and add the IAG Marketrak/TX SET process.

What should be in person and what should be via WebEx. Could some be both?

Suggestion is to have an in-person TX SET training in Dallas and one in Houston and a 3rd totally WebEx.

Plans for those listed above will be revisited at the next RMTTF meeting.

We may be able to do a “train the trainer”.



**2024 Upcoming RMTTF meetings**

The November 7th RMTTF date HAS been changed to November 21st and the ERCOT website has been updated.

* June 6 9:30 AM Web-Ex only
* August 8 9:30 AM Web-Ex only
* September 12 9:30 AM Web-Ex only
* October 10 9:30 AM Web-Ex only
* November 21 9:30 AM Web-Ex only
* December 12 9:30 AM Web-Ex only

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| Just a reminder of what to send to who from WG and TF Leadership  If you need:   * To post WG/TF items to the WG/TF page - send to Market Support Services * To schedule WG/TF meeting – send to Stakeholder Services * To post WG/TF items to the RMS meeting page – send to Stakeholder Services   Materials should be provided for posting 7 days in advance of the meeting date. |

**Status of development of changes for training materials and modules**

We will start modifying the RMTTF ppt for TX SET at our next meeting.

We will have our regular meeting and also a workshop style meeting to review and modify the ppts.

Meetings will be held in Dallas at Oncor.

Oncor Electric Delivery

1616 Woodall Rodgers Fwy, Conference Room 822

Dallas, TX 75202

June 20th - 9:30 AM to 4:30 PM

June 21st 9:30 AM to Noon

**Other Business**

The June 6th, 9:30 AM RMTTF meeting is being cancelled.

Rob noted an item that needs to be changed in the RMG 7.3.5 paragraph 2 – rescission time frame needs to be updated.

Monica will get with Tammy.

**Adjourn**

Tomas adjourned the meeting at 11:18 AM.