

RMTTF Meeting

December 4th 2025
9:30 AM

This meeting is being held via WebEx.

Melinda Earnest was Chair; Debbie took notes for today's meeting.

Several have conflicts so this meeting will just cover most of the items that are time sensitive. Other agenda items will be taken up in February.

Melinda welcomed everyone and proceeded with reading the antitrust statement.

Introductions

Names were read off the WebEx

- Kathy Scott CenterPoint
- Debbie McKeever Oncor
- Elizabeth Morales ERCOT
- Ayca Argetsinger AEP
- Melinda Earnest AEP
- Sheri Wiegand Vistra
- Monica Jones CenterPoint
- Tomas Fernandez NRG
- Heverton Andrade Grid monitor
- Grace Graham Cim View
- Elizabeth Morales ERCOT
- Nick Reddy Cim View
- Art Deller ERCOT

Meeting Agenda

Agenda was reviewed.

No questions were asked. No changes were made.

Meeting Notes

Meeting notes from the last meeting were reviewed.

No changes requested.

Meeting notes are considered final.

LMS Counts for Online Training Modules

Art provided the latest LMS Counts.

There was an increase across all modules. Retail 101 is usually the highest and that's good since it's a baseline of education for retail. ERCOT receives good feedback.

ALL-TIME as of 1/1/25			
LMS WBT Stats	In Progress	Complete	Total
MT All Time	847	1385	2232
Retail 101 All Time	1816	1071	2887
Mass Tran All Time	63	118	181
Texas SET All Time	118	103	221
As of 12/4/2025			
LMS WBT Stats	In Progress	Complete	Total
MT 2025	55	203	258
MT All Time	902	1588	2490
Retail 101 2025	185	218	403
Retail 101 All Time	2001	1289	3290
Mass Tran 2025	6	28	34
Mass Tran All Time	69	146	215
Texas SET 2025	24	53	77
Texas SET All Time	142	156	298

Mass Transition, there was a small increase. Art mentioned the count will jump if we have another Mass Transition.

Note! The date listed below in the table is June 26. Art said that's an error. The count is as of this morning. Should reflect 12-04/2025.

TX SET 5.0 Survey Results

Art provided the survey results for the TX SET 5.0 training.

All survey results were positive with the exception of the technical issues. The Microsoft outage was thought to be at least part of the reason for audio issues and Power Point presentation animation delays.



Survey question: "What did we do well?"

Some positive comments included:

- Kept everyone involved and engaged.
- Switching up the speakers was great.

- The balance of the course material, open conversation and breaks sprinkled in was perfect.
- Each subject was thoroughly explained.
- Keeping everyone engaged despite the technical difficulties, it went well.
- Expert knowledge sharing.
- Cadence and shares knowledge.

2026 Retail Training

At the last TAC meeting it was requested that Instructor Led Retail training be held via WebEx.

RMTTF will support WebEx training for all Retail Training and avoid scheduling training on PUCT Open meeting dates as well as the day before.

2026 PUCT Scheduled meetings through August 20th. Meeting start time is 9:30 AM for each.

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|---------------|-------------------|
| • February 05 | PUCT Open meeting |
| • February 20 | PUCT Open meeting |
| • March 12 | PUCT Open meeting |
| • March 26 | PUCT Open meeting |
| • April 2 | PUCT Open meeting |
| • April 17 | PUCT Open meeting |
| • May 7 | PUCT Open meeting |
| • May 29 | PUCT Open meeting |
| • June 18 | PUCT Open meeting |
| • July 9 | PUCT Open meeting |
| • July 30 | PUCT Open meeting |
| • August 20 | PUCT Open meeting |

Kathy said that the CenterPoint REP Workshop will be held in May.

They are steering clear of the first week in May since Retail Training is scheduled.

Oncor has not determined the date of the REP Workshop, but it will be in the Spring.

2026 RMTTF Leadership elections

Nominations were held.

Kathy nominated...

Debbie McKeever with Oncor, Tomas Fernandez with NRG and Melinda Earnest with AEP

Sheri seconded the motion.

There were no other nominations.

Each accepted the nomination.

Debbie, Tomas and Melinda will serve as the 3 co-Chairs for 2026.

As requested by ERCOT, they need the contact information for each co-Chair.
Debbie will provide.

2026 Scheduled Training dates

The dates listed below have been provided to Art. Art verified all dates are currently clear without conflict of other training.

Note! *Designates instructors will be in person for presenting Instructor Led Training.

Green highlighted text indicates a change was made during this meeting.
The training was changed from “in person” to WebEx only and location for the instructors has been changed to Oncor. Was previously Vistra.

AV testing and logistics for the Instructor Led training- (training via WebEx – Instructors in person) will be coordinated by the following:

Kathy Scott	Centerpoint	Houston
Debbie McKeever	Oncor	Dallas
Melinda Earnest	AEP	Corpus Christi

February 18 th	8:30 AM	MarkeTrak Part1*	ONCOR - DALLAS
February 18 th	1:30 PM	RMTTF	ONCOR - DALLAS
February 19 th	8:30 AM	MarkeTrak Part 2*	ONCOR - DALLAS

March 3 rd	8:30 AM	TX SET 5.0*	CENTERPOINT – HOUSTON
March 4 th	9:30 AM	RMTTF	CENTERPOINT – HOUSTON

April 2 nd	9:30 AM	RMTTF – WebEx only
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May 6 th	8:30 AM	MarkeTrak part 1*	ONCOR - DALLAS
May 6 th	1:30 PM	RMTTF	ONCOR - DALLAS
May 7 th	8:30 AM	MarkeTrak part 2 *	ONCOR - DALLAS

June 4 th	9:30 AM	RMTTF - WebEx only
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July	RMTTF	No meeting
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August 6 th	9:30 AM	RMTTF - WebEx only
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September 23	8:30 AM	TX SET 5.0 - WebEx only	ONCOR - DALLAS
September 24	9:30 AM	RMTTF	ONCOR - DALLAS

MarkeTrak Training will be held in October, but no exact date known at this time.
RMTTF will coordinate to be held the same week as the AEP REP Workshop.

November No RMTTF meeting
December 1st 9:30 AM RMTTF WebEx only

TX SET 5.0 PPT – Slides per presenter

Debbie	slides 1 through 14
Kathy	slides 15 through 39
BREAK	Tomas will set up dual screens during the break
Sheri	Slide 40 through 43
For slide 44 – dual screen THROUGH 52 – dual screens	
Sheri	Checkpoint question
Monica	Slide 56 through 64
LUNCH	45 minutes – could go to an hour
Melinda	65 through 72
Amy Sue	73 through 76 – Sheri to check with Michael about a replacement for Amy.
Tomas	77 through 95
Kathy	96 through 100
BREAK	
Sheri	101 through 113
Kat and Deb	114 through 117
Tomas	Talk about the break and survey on page 126- Tomas will display QR code
BREAK	
Tomas	Kahoots may permanently replace Jeopardy the group exercise (118 – 123)
Tomas	123 through the end.

Other Business

Below includes Kathy's list of corrections that was emailed to the team for Sheri or Tomas corrections to MarkeTrak Day 1 and MarkeTrak Day 2 slides. Small changes are needed that will help Market Participants understand the process and provide additional clarity.

We went through these items for modifications.

- **MarkeTrak Day 1:**
 - **Slide 9:** Sheri Weigand will need to add the most recent ***MarkeTrak Subtype Volumes Analysis*** based upon either the end of Q3 2025 or, if available in time for pdf document final posting, end of Year 2025
- **MarkeTrak Day 2:**
 - **Slide 29**—needed to update with the SCR 817 process changes that currently allows the TDSPs to close the issue without REP of Record Approval. I see the language is included, but not sure if the screen needs to be corrected.
 - **Slide 73** – need to correct answers (B) (C) to (A) (B) looks like we removed response (A) and didn't renumber
 - **Slide 86** – Should we correct the answer or clarify the question- it seems that the responses were mixed with confusion?
 - **Slide 87** – Answer #D needs to be reflected in the answer response – presentation mode doesn't show the answer just goes straight to slide #88 instead.

Those corrections will be included in the latest version of MarkeTrak part 1 and part1.

Goal is to finish and provide the final presentations to Art in early January, so he has plenty of time to post those to the LMS. In the past it has been too close to the posting and the training for trainees to get a full review before the training. We will send those to Art.

The next meeting will be held after MarkeTrak part 1. The meeting will be held in person and also via WebEx. Will be held at Oncor in Dallas.

Debbie will make sure that the details are provided to ERCOT and correct on the meeting page.

RMTTF co-Chairs thanked everyone for attending.

Adjourn

Meeting was adjourned at 10:58 AM.