RMTTF Meeting

Friday, September 20, 2024

9:30 AM

Oncor Electric Delivery

1616 Woodall Rodgers

Dallas, TX 75202

This meeting is being held in person also WebEx.

Debbie opened the meeting and welcomed everyone and proceeded with reading the antitrust statement.

**Introductions included:**

* Kathy Scott Centerpoint
* Debbie McKeever Oncor
* Melinda Earnest AEP
* Sheri Wiegand TXU
* Monica Jones Centerpoint
* Art Deller ERCOT
* Jordan Troublefield ERCOT
* Angela Ghormley Calpine
* Eric lotter GridMonitor
* Amy Sue Stirland LP&L

**Meeting Agenda**

Meeting agenda was reviewed. No questions were asked. No changes were made.

**Meeting Notes**

Meeting notes from the last meeting were reviewed. No changes were requested. None of the leadership received requests for changes. Meeting notes are considered final.

**LMS Stats**

Art provided the LMS stats.

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| --- | --- | --- | --- |
| As of 9/20/2024 |  |  |  |
| **LMS WBT Stats** | In Progress | Complete | Total |
| MT 2024 | 52 | 131 | 183 |
| MT All Time | 662 | 1350 | 2012 |
| Retail 101 2024 | 176 | 156 | 332 |
| Retail 101 All Time | 1772 | 1035 | 2807 |
| Mass Tran 2024 | 7 | 18 | 25 |
| Mass Tran All Time | 62 | 115 | 177 |
| Texas SET 2024 | 25 | 25 | 50 |
| Texas SET All Time | 108 | 92 | 200 |
|  |  |  |  |

A bit of discussion took place noting that there isn’t much of an increase from the last report since many are planning for TX SET 5.0 and are possibly not going to attend existing training modules. No other comments were made.

**Update from RMTTF Workshop held yesterday/September 19th**

Those in attendance at the workshop gave an update of the workshop. One thing that was clear is that we need to identify “what else is needed” before we finalize the training materials.

Consensus was that it was really good to have the Workshop session after Tammy’s training. She did an excellent job. The changes were explained very well. There will be another MarkeTrak training session to go over the new screens and changes. Probably the same material but may be a little more in depth.

We also need to update the slide in the MarkeTrak training materials with the MarkeTrak issue history. Sheri to double check that.

**Update from MCT and TX SET as well as the Implementation Timeline**

Kathy provided an update regarding the status including the RMS email vote. Jordan provided a status. He has received quorum for the responses and has already received enough votes from the members of the segments that the latest version of the timeline has been approved. He will send a note out to the market probably on Monday.

Sheri said that they have been presenting the updated transition calendar each month at RMS. They will also send out a market notice the last week in October 28th of a reminder. This will also be presented during the October 24th

Sheri will send out a market notice on November 4th as a reminder “no more ready to receive…critical to send your backdated move ins “.

October 24th – this will be the second training and the last training presented by Tammy, before go-live, weekend of November 8, 9, 10th.

MarkeTrak user guide – Tammy won’t be finished with the User Guide until November 11th. Right now the only thing available is the Retail Market Testing Environment (RMTE).

The test environment is available now. There are no requirements for MPs to test MarkeTrak.

**Dates for Retail Training**

Below are the discussion points for 2025 training, except there will be one more Retail 101 training session in 2024.

Retail 101 – next instructor led training date is November 12th. WebEx only.

All noted below will be held 3 times in 2025 –

Retail 101

Provided and presented by ERCOT for Instructor Led

Dates TBD

RMTTF volunteers please try to attend as TDSP and REP SMEs.

MarkeTrak Part 1 and 2

Will discuss those later. We were going to have a full day scheduled the day before or after TX SET training but now we are thinking that’s too much at once.

TX SET 5.0

We need to find a way to have the breakout sessions but not lose any of the synergy with the attendees. Art mentioned that he has had success with the breakout sessions with instructor led training offered WebEx only and he can help with the training.

Art provided the list of instructor led trainings that have breakout sessions. The breakout session attendees (who gets into each group) is done randomly by the program. Seems to have worked well.

He said to make sure and post the exercise on the training page and make it clear in the Training email notification that those registered to attend the training need to download it before the class.

Art said to put a limit on the attendees and then have 2 instructors. Instructors would be together. About 50 people with 6 breakout sessions.

Plan for TX SET 5.0 in person – Dallas and Houston

RMTTF Training Presenters make best attempt to attend one of the upcoming WebEx instructor led classes. See below!

Art said to check the calendar but both Revenue Rights, Wholesale Markets Day Ahead and Real time. All of those have breakout sessions during the training. It could work for TX SET 5.0.

**MarkeTrak Training part 1 and part 2**

Will be held WebEx only - Instructors will gather together to present. This has been found to be effective with eliminating issues previously experienced with transitioning from one presenter to another.

**TX SET 5.0**

Planning two INSTRUCTOR LED trainings IN PERSON

March 2025, in Houston –

Kathy to check. Attempt to the hold on the 27th of March. Back up date is the 13th.

June 2025 will be in Dallas -

June 12th – first choice

June 26th – alternate date.

RMTTF meetings will be held the day after each of those.

The first ever, TX SET Instructor Led training to be held via WebEx only…TX SET 5.0 – WebEx on Wednesday, October 29th and RMTTF the next day. This session for instructors will be in Austin so Art can be with the RMTTF presenters. He has been able to have breakout sessions during WebEx training, so his attendance is important.

MarkeTrak part 1 and part 2 - 2025

February 25th and 26th

April 29th and 30 WebEx only – Instructors will meet in Houston at Centerpoint

September 24th and 25th - Instructors will meet in Dallas at Oncor Electric Delivery

**Upcoming Meetings**

Additional meetings need to be held for RMTTF to complete our work by the deadlines. Suggestion is to have one in person. Much better progress is made when we are all in the same room.

2025 we may not need any in person meetings. If we do then we will coordinate with the training sessions.

Kathy and Debbie will work together to get those scheduled.

**Other Business**

At the next meeting, we need to finalize the list of RMTTF meetings for 2025. Suggestion is still to put 11 on the calendar…as usual. We don’t have meetings in July. Too many busy with Summer activities and July has a holiday.

Those attending thanked Oncor for hosting.

Debbie thanked everyone for attending and adjourned the meeting.