RMTTF Meeting

Thursday, November 21

9:30 AM

This meeting is being held via WebEx.

Melinda Earnest Chaired the meeting.

Melenda welcomed everyone and proceeded with reading the antitrust statement.

Introductions followed.

**Introductions included those listed on the WebEx:**

* Kathy Scott Centerpoint
* Debbie McKeever Oncor
* Melinda Earnest AEP
* Sheri Wiegand TXU
* Monica Jones Centerpoint
* Art Deller ERCOT
* Jordan Troublefield ERCOT
* Eric lotter GridMonitor
* Lysette Balance Centerpoint
* Tomas Fernandez NRG

**Meeting Agenda**

Melinda read the agenda. No questions were asked. No changes were made.

**Meeting Notes**

Meeting notes from the last meeting were reviewed.

It was stated that the notes included a different assignment for Sheri. The assignment was actually “Day to Day; Usage and Billing”. Debbie noted that she would just include that in today’s meeting notes and not modify the notes from last meeting if that’s agreeable. Sheri said she is good with that. No other changes were requested and no other comments were made.

None of the leadership received requests for other changes. Meeting notes for our last meeting are considered final.

**LMS Stats**

Art provided an update from the Retail 101 class held November 12th.

Art said it went very well and the comments were very good.

It was WebEx only.

There were 62 registered and 32 that attended.

That number is considered good given the efforts going on with the clean up of TX SET 5.0 and MarkeTrak SCR817.

The LMS counts were obtained this morning and provided by Art.

See below.

|  |  |  |  |
| --- | --- | --- | --- |
| As of 11/21/2024 |  |  |  |
| **LMS WBT Stats** | In Progress | Complete | Total |
| MT 2024 | 60 | 157 | 217 |
| MT All Time | 670 | 1376 | 2046 |
| Retail 101 2024 | 204 | 183 | 387 |
| Retail 101 All Time | 1800 | 1062 | 2862 |
| Mass Tran 2024 | 8 | 20 | 28 |
| Mass Tran All Time | 63 | 117 | 180 |
| Texas SET 2024 | 34 | 34 | 68 |
| Texas SET All Time | 117 | 101 | 218 |

Melinda went through the stats and it was noted there was increase in several different training modules.

**Update from Review of Online MarkeTrak Modules**

Those who had an assignment for reviewing provided an update of their findings.

To verify the modules, Melinda suggested that each of us take one of the 5 modules to review.

Assignments include:

• Tomas IAG

• Melinda and Monica Switch Hold

• Melinda and Amy Sue Cancel with Approval Melinda and Amy Sue

• Monica Bulk Insert

• Sheri Day to Day

General Comments provided:

Usage and Billing – clarify results - the slide 2 of 5.

AMS LSE Dispute – slide 2 of 4.

Think this was missed. There’s No indication of the LSE subtype change. No redesign.

2 new Subtypes – meter cycle change request in day to day and the LSE. For LSE, it is not done.

Usage and Billing has not been updated.

Art said that Tammy needs to know what needs to be done.

Tomas asked art if there was a way, they could scan the updated training. That was done in the past. Is that something Art can help us with. We have the presentation and identified where we need new screen shots. RMTTF will update the presentation and send to Art and note exactly where we still need screen shots. We had slide 58 where we needed a screen shot.

**Open discussion – migration of TX SET 5.0 and MarkeTrak SCR817, other changes**

Went well with the transition and is working pretty well.

Tomas’s team likes the changes and the speed of how things are happening.

What they don’t like is the MIS change that wasn’t expected or communicated is the biggest frustration for what has happened. There was no time to prepare or train.

This is a significant impact on productivity.

What was one or two clicks is now 5 or 6 clicks and data is all over the place.

Sheri said that TDTMS on December the 4th they will be taking this up and can talk about making a request on what needs to be done.

Before it was all in a nice format and now it’s not and the user needing the data has to hunt all over and it’s hard to find info because of the location of the data. Also, the back button is at the bottom and it used to be at the top.

At the next meeting we will do a final review of all in progress and pass that to Art.

Kathy asked if we needed to go back and look at everything because the detail, we modified may be incorrect because we were not expecting

Kathy provided an update that MCT will be conducting a “lessons learned” session soon. It should include all the items noted that didn’t go well or issues experienced or that we are experiencing.

**Instructor Led Training – slide changes**

Changes were noted or made during the meeting.

Switch Hold;

Action item;

Slide 58 - “AMS LSE Disputes” – we just need a screen shot.

Sheri has the action item to add screen shot and dispute reasons.

Kathy asked if Meter Cycle change is in day 1 or day 1. It’s in day 1 presentation.

Inadvertent Gain;

Comments include;

Tomas is adding a new slide explaining “TDSP ready to receive” is no longer included in the process.

IAGs are now a total of 52% of all MarkeTraks.

**Dates for 2025 Retail Training**

As discussed at the last meeting.

All noted below will be held 3 times in 2025 –

Retail 101

Provided and presented by ERCOT for Instructor Led

February 11, 2025 – per Art, this has been scheduled.

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

MarkeTrak Part 1 and 2

Trainers will be in person to avoid technical issues. One will be in Dallas and one in Houston.

**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.

**MarkeTrak Overview, Part 1 MarkeTrak Switch Hold and IAG, Part 2**

February 25th February 26th Date – date is final, confirmed by Art

April 29th April 30TH TENTATIVE – CNP to host instructors

September 24th September 25th TENTATIVE – Oncor to host instructors

MarkeTrak Part 1 and 2 will both be held WebEx only – all will start at 8:30 AM

Each session is about 4 hours.

**2025 Meetings**

We need to finalize instructor training presentations ASAP, which is more critical so Debbie suggested to move this agenda topic to next month’s agenda. It was agreed this will be taken up at our next meeting.

**2025 Leadership**

2025 Elections were discussed. Question was asked to Jordan if the elections can be held in 2024 or if it needs to be in 2025. Jordan said there’s nothing that prohibits us from having elections today.

Last year RMTTF was the last to hold elections so we should try to get that in just in case we cancel our next meeting or first in January.

Kathy Scott nominated the 3 existing co-Chairs for the 2025 period.

Jordan asked for other nominations. There was no response. Jordan asked each if they accepted the nomination. All 3 said yes. Those attending today voted yes, so all 3 are elected for 2025.

Melinda Earnest AEP

Tomas Fernandez NRG

Debbie McKeever Oncor

**Other Business**

Our next meeting will be December 12th. 9:30 AM.

No other business.

**Adjourn**

Melinda thanked everyone for attending and adjourned the meeting.