



# Manual 14D

## Transferring Generation Responsibilities and Process

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- PJM is looking to enhance the current communication and process for Generation Transfers
  - Ensure all proper documentation and protocols are in place prior to the effective date of the transfer
  - Ensure all parties are committed to transfer
  - Ensure all parties understand requirements
- At the September 2017 OC, PJM provided educational material and discussion
- A new sub-section 2.2 was created and Section 5.7 was elaborated in Manual 14D

- Provides clear guidance and expectations of the generation owner when considering a transfer of a facility
- Describes the required information needed in the notice of transfer to PJM and when this information is due to PJM
  - Unit information, ISA, organization chart, DOA, etc.
  - The earlier of (i) Section 203 is filed with the Commission; or (ii) 10 days after binding transaction documents are executed
- Ensures that all required legal documents are in place and the required parties of the transfer are included

- Section 2.2.2
  - Describes the process that Members must take to disclose that a generator or Interconnection Customer changed its name
- Section 2.2.3
  - Connects Section 2.2 with Section 5.7 and the actual generation transfer process

- A resource cannot be transferred between two entities unless it goes through the process as described in Section 2.2. This process does not transfer the resource within the PJM systems.
- Section 5.7 describes the process on how to transfer the resource within PJM systems. The legal transfer is only one part of the entire transfer process (5.7.2.1).
- The Effective Date determined in Section 2.2 does not have to be the same as in Section 5.7, but it must occur prior to the date in Section 5.7.
- After submitting a request via Section 5.7, that Effective Date may be pushed back to accommodate other uncertainties determined in Section 2.2.

- Enhanced current section with details
  - How the generation transfer process is initiated
  - What type of information is required
  - Timeline guidance
- Collaborative process that needs all parties working towards same goal

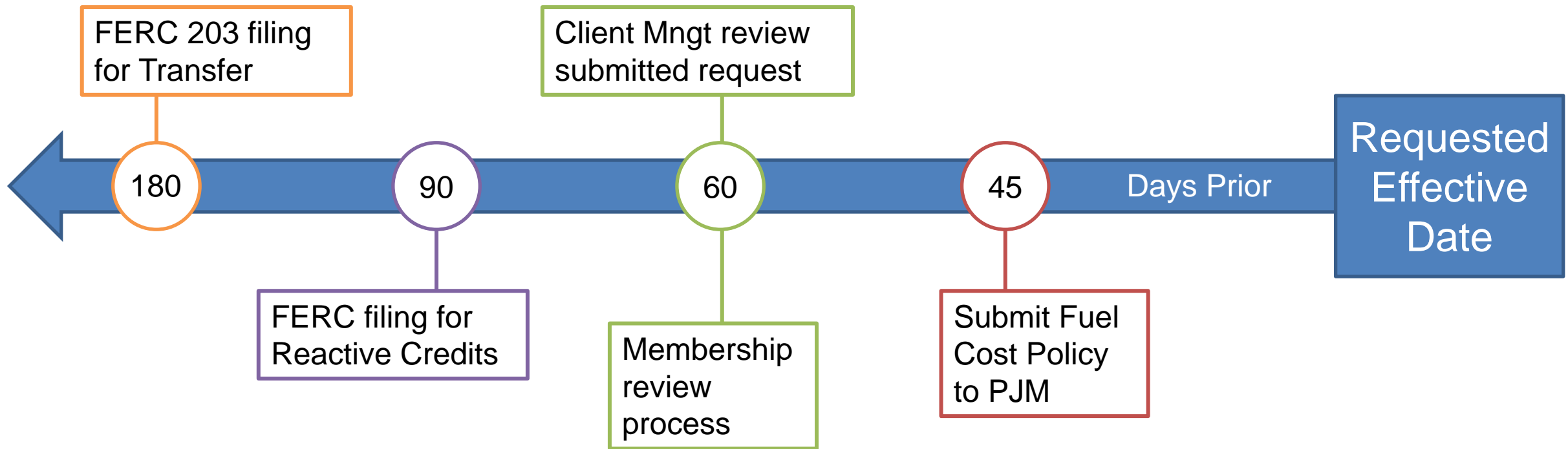
- How the generation transfer process is initiated?
  - Only submission through the Member Community
  - Requires a one-page form and excel spreadsheet
- PJM requires at least 45 days to review the information and ensure all required documentation and information is obtained, correct and approved
  - The submission starts the process, this is not all the required information need for the transfer
- A user guide is being created to provide step-by-step instructions on how to fill in the spreadsheet

- Market Gateway Unit ID and Name
- eRPM Resource ID and Name
- Pnode ID
- Transmission Zone
- IA / ISA / PPA
- DOA / Consent to Assignment
- Fuel Cost Policy
- Dispatch Company
- Training and Certification
- Telemetry protocols
- Telemetry contact information
- Ancillary Service Market participation
- Black Start Service
- Account Manager
- PowerMeter
- Inschedule
- eDART
- eGADS
- Resource Tracker
- Reactive Credits
- Settlements
- PJM Membership



- Dec. 12, 2017 – OC - 1<sup>st</sup> Read
- Jan. 4, 2018 – SOS – Review
- Jan. 9 – OC – Endorsement
  - User Guide posted with material for viewing
- Jan. 25 – MRC – 1<sup>st</sup> Read
- Feb. 22 – MRC – Endorsement
- Feb. 22 – Effective

# APPENDIX



### Example 1

- With Reactive Service FERC filing.
- 45 days is AFTER all requirements in M14D, Section 2.2 are met and request is submitted through Member Community

February / March						
S	M	T	W	TH	F	S
18	19	20	21	22	23	24
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Reactive filing submitted to FERC before Effective Date

April						
S	M	T	W	TH	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

45 days before Effective Date

May						
S	M	T	W	TH	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	

45 days before Effective Date

5 BD before Effective Date

Holiday

Effective Date

### Example 2

- 45 days is AFTER all requirements in M14D, Section 2.2 are met and request is submitted through Member Community

February / March						
S	M	T	W	TH	F	S
18	19	20	21	22	23	24
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

45 days before Effective Date

April						
S	M	T	W	TH	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

45 days before Effective Date

5 BD before Effective Date

Effective Date

Holiday

May						
S	M	T	W	TH	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	