

Regional Practices and Implementation Documents Amendment Process

PJM recognizes the following steps regarding the amendment process of the Regional Transmission and Energy Scheduling Practices (i.e. Business Practices) and the NERC required Implementation Documents (e.g. ATCID, TRMID, CBMID, and Postback Methodology):

- *Step One* – PJM identifies the need to create a revision to the Business Practices or Implementation Documents. The need may be initiated by PJM Staff, the Members or may originate by FERC order, Tariff change, NERC standard, NAESB standard or by a PJM Procedure Manual change. In the event of a minor or ministerial change, the Stakeholder Review steps may be skipped, but a notice will be posted on the OASIS page to reflect a minor update.
- *Step Two* – Manager of Transmission Service approves the need to create or revise the document and assigns an Author.
- *Step Three* – Author must sign out document from the PJM document management system (DOCS#369353) and inform the Transmission Service department to begin the process.
- *Step Four* – Document Analyst checks that the document has not already been checked out. If the proposal is already signed out, then analyst must: resolve the issue with the Author and Manager.
- *Step Five* – Document Analyst uses PJM’s document management system to:
 - Prepare a new draft version of the document including turning on “track changes.”
 - Provides author and “Organizational Compliance” group full access to the document.
 - E-mails draft document to author so that they can make their revisions.
- *Step Six* – Upon receiving the draft document, the Author must do the following:
 - Revises the document’s content with track changes turned on.
 - Lists the effective date, and any references if required.
 - Confirms that the approving manager’s name on Approval page is correct.
 - Gives other subject matter experts Normal Access to document if they will be making changes.
 - Sends redline version to all reviewers.
- *Step Seven* – Subject matter experts review the document and send any comments or edits back to the Author.
- *Step Eight* – Author incorporates any edits or comments into the document and sends redline revision back to the Transmission Service department.
- *Step Nine* – Document Analyst:
 - Reviews document to fix any errors relating to issues such as style and grammar.

- Once all pending issues have been resolved, the Transmission Service department prepares a clean PDF version of the document and a redlined PDF. The Transmission Service department sends a clean PDF of the document to the author.

Verification for Posting

Step One – After receiving the clean PDF copy of document, Author:

- Checks clean PDF for all updates, exhibits, hyperlinks, and etc.
- If mistakes are discovered, returns PDF to Document Analyst for corrections.

Once all mistakes have been resolved, Author sends an email to the Document Analyst stating that the document has been approved and with the PDF attached.

Step Two – The Transmission Service department archives the approval e-mail and submits the document for stakeholder review.

Stakeholder Review

In an effort to ensure maximum participation of stakeholders in the validation of these procedural changes, PJM's Transmission Service department will present the changes to the MIC for endorsement. Such changes shall be posted on the PJM website at least one week prior to the applicable committee meeting with the respective effective date for the proposed changes. The intent of asking for endorsement is to ensure a full and open vetting of the changes and opportunity for comments, but because of the independence required in the administration of the Tariff, PJM can decide to implement the rule changes even if the MIC fails to provide such endorsement. Additionally, if FERC/NAESB/NERC imposes a requirement for an immediate rule/process change PJM can make this change to ensure compliance with such a directive and subsequently follow up with the stakeholders regarding the required change. Also, for clarifying changes where there is no impact to the Transmission Customer, MIC review and endorsement is not required. A redlined copy of the document along with the final document will be posted on the PJM website.

- PJM will present the changes to the MIC for endorsement. If the MIC fails to endorse the document, PJM staff will take the stakeholders' feedback and make modifications as necessary.

Stakeholder Approval

Author posts and verifies that the document has been correctly posted to OASIS and sends out an e-mail confirmation of the posting.