Settlements and Billing Survey Results

Market Settlements Subcommittee
November 18, 2014
Have you taken Market Settlements 301 training?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>Count</td>
<td>47</td>
<td>67</td>
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When did you take Market Settlements 301?

- 3 in 2014
- 8 in 2013
- 30 more than 2 years ago
Would you find it beneficial for PJM to publish a video presentation highlighting the main topics and features of the Market Settlements 301 training?

- Yes: 83
- No: 19
Do you use the Market Settlements Reporting System (MSRS?)

Yes: 91
No: 11
Are you satisfied with the supporting documentation to settlements and billing posted on the Market Settlements Web pages?

- Yes: 62
- No: 18
Do you understand the concept of weekly billing and its relationship with the monthly billing process?

80 Yes
8 No
Do you know where to look on pjm.com to find the supporting details to the billing line items?

Yes: 63
No: 25
Would you find it beneficial for PJM to publish a Settlements and Billing FAQ based on common questions received by PJM from market participants?

Yes: 81
No: 3
If additional information is provided on Market Settlements, what format would you prefer?

- Videos: 34
- FAQs: 57
- Examples: 64
Does PJM provide an adequate level of information for you to understand the operational and market drivers and their impacts related to significant settlement charges when they occur?

![Bar Chart]

- Yes: 44
- No: 40
Do you understand the settlement rules for how PJM calculates and processes Balancing Operating Reserves and Lost Opportunity Costs?

Yes: 31
No: 53
Do you understand the relationship between Cash Management and Billing?

- Yes: 55
- No: 29
Do you understand how PJM processes adjustments to your bill?

- Yes: 55
- No: 29
Are you involved with the settlement and billing processes in other ISOs and RTOs?

- Yes: 45
- No: 39
Common Themes from Comments

• Additional Training Topics
  – Short online course with summary of annual updates in conjunction with MS301
  – More detailed training on specific topics such as settlement of Ancillary Service, Emergency Energy, Operating Reserves

• Improvements to Market Settlements web page
  – Include supporting calculations in report documentation
  – Provide more details for line items in the Customer Guide to Billing
Common Themes from Comments

• Enhancements to MSRS
  – More advance notice of billing adjustments
  – Single sign on to access all associated accounts
  – Additional details for each report on the calculations
  – Expanded date ranges for report querying
  – Create a “Favorites List” of commonly requested reports
  – Improve system performance especially during peak report download periods
Common Themes from Comments

- Additional comments and suggestions