

Data Migration from Queue Point to NextGen

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Queue Point will support:

- Expedited Projects
- Transition Cycle 1
- Parallel Process Requests
(Surplus Interconnection Study Agreements and Upgrade Application and Studies Agreements)

NextGen will support:

- Cycle 1 Application and Studies Agreements (ASA)
(Generation, Merchant, and Long-Term Firm Requests)
- **Transition Cycle 2**

*PJM will notify stakeholders as additional support is implemented in NextGen

- Primary contacts have received an email detailing:
 - The TC2 projects they are currently associated with
 - Required next steps to support the migration process
- **PJM cannot migrate TC2 project data until the Project Developer or Eligible Customer is added to a Company Profile in NextGen.**
- Once a company is added in NextGen, their associated TC2 projects will be transferred nightly from Queue Point to NextGen.
- Once the data is migrated, the projects must be managed in NextGen.
- All TC2 DPI requirements must be submitted to PJM via NextGen only. Queue Point submissions will not be accepted.
 - Any missing application information must be provided at DPI

Required Actions by all users ([NextGen user guide](#))

1. Ensure your company in Account Manager is up-to-date and not set to 'Other'
 - Email your Customer Account Manager (CAM) or custsvc@pjm.com to move your account to the correct company
2. Request NextGen access via Account Manager
3. Setup your company profile if not done by another user from your company
4. Add all Project Developers or Eligible Customers from the TC2 applications to the Affiliated Applicants section of the Company Profile.

Reach out to your PJM PM or nextgen-support@pjm.com if the list of projects included in the email from PJM is incorrect.

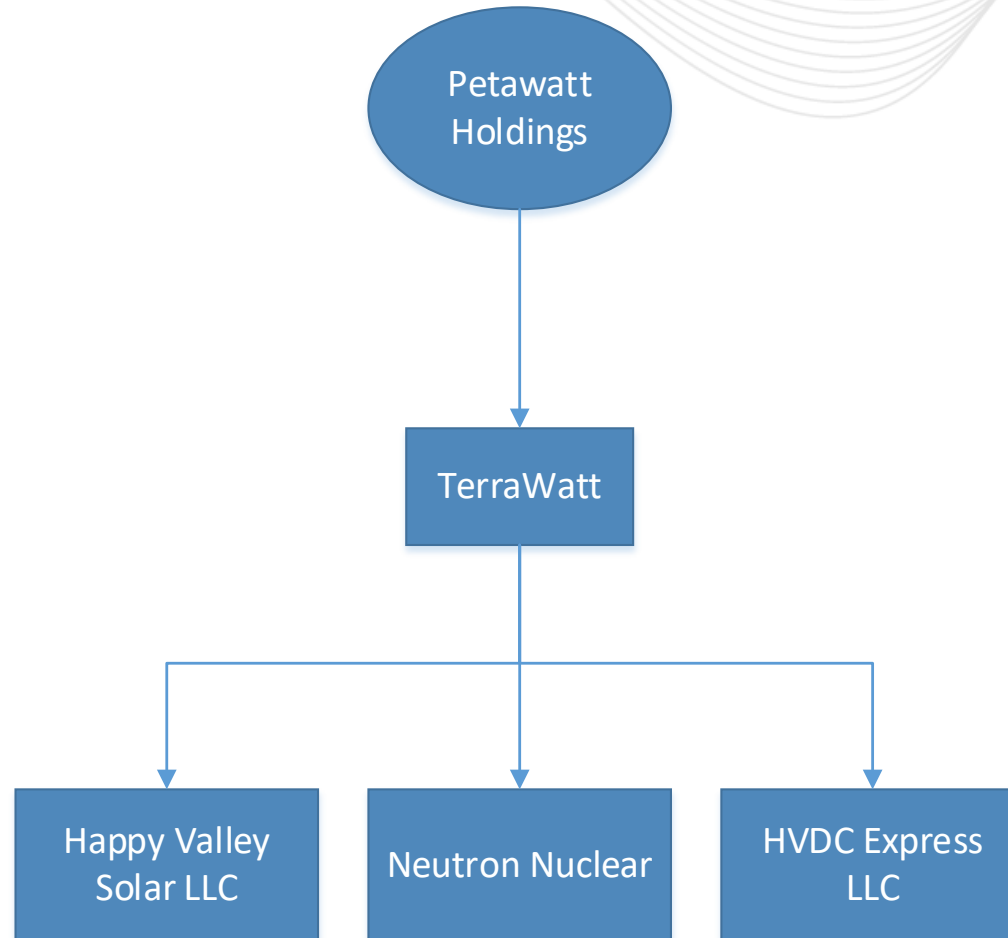
The Project Developer or Eligible Customer name from Queue Point must be an identical match to what is entered in NextGen.

If the name does not match, the data will not be transferred.

General Information	
Point of Interconnection	
Project Capability	
Generator Information	
Transformer Information	
Collector System Equivalent	
Attachment Line Data	
Supporting Documents	
Deposits	
Review	
Confirmation	

General Information	
Queue number	Project name *
AG2-484	Nuclear Center
Name of a signature authority from company *	Title *
Jimmy Neutron	Chief Operating Officer
Project Developer (former Interconnection Customer) *	Federal Tax ID *
Neutron Nuclear	12-3456789 XX-XXXXXXX
Phone (day) *	Phone (evening)
215-123-4569	
Email of a signature authority from company *	Fax
Josh@TerraWatt.com	

Example Organizational Chart



Parent or Holding Company

The Parent is the top most company in the organization (as shown in the evidence of ownership)

Company Information

User login and company access is managed in Account Manager. All users within a company see the same Company Profile and all associated projects.

Affiliated Applicants

All subsidiary Project Developers and Eligible Customers can be selected on the New Service Request Application

The user's company is determined through Account Manager – 'TerraWatt' in this example.

Company information and Affiliated Applicant information will be shared with all employees of 'TerraWatt' with NextGen access.

Company Profile

My NextGen
Task Lists
Projects
Cycle Timelines
Letters of Credit
Reports
Messages
Company Profile

Company Information (TerraWatt)

Company name * i

📍
Terrawatt

Country *

Address *

City *

State/Province *

Zip/Postal code *

Primary phone number

Primary email address

Company tax ID *

IRS W-9 form or comparable state-issued document *

Choose

Do you have a parent company? *
☒ Yes
 ☐ No

Parent or Holding Company Information

Company name * i

📍
Petawatt Holdings

Country *

Address *

Address (continued)

City *

State/Province *

Zip/Postal code *

Primary phone number

Primary email address

Evidence of ownership of TerraWatt * i

Choose

Affiliated Applicants

Add any additional Project Developers or Eligible Customers.

Add New

Actions	Affiliated Applicant Name	Tax ID	W-9 Form	Evidence of Binding Relationship	Status
✎	Happy Valley Solar LLC		📄	📄	Active
✎	Neutron Nuclear		📄	📄	Active
✎	HVDC Express LLC		📄	📄	Inactive

1-10 of 50 records

◀
▶

1

2

3

4

5

▶

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- Follow the existing procedures
- To update the Project Developer or Eligible Customer name:
 - Submit a consent to assignment agreement and associated documentation
 - Notify your PJM PM so they can coordinate updating Queue Point
- Report mergers and acquisitions of parent companies:
 - Email IPAdmin@pjm.com to request and submit the appropriate form

Consent to Assignment Agreement Templates		
Project Assignment	PJM Contact	Consent Documents
Prior to Interconnection Service Agreement, Wholesale Market Participant Agreement or Upgrade Construction Service Agreement execution	Interconnection projects project manager	For Cycle Projects: Combined Buyer-Seller DOC Seller DOC Buyer DOC
After ISA and prior to commercial operation (i.e. during construction)	Infrastructure coordination project manager	Assignment to: Lenders DOC
After commercial operation ¹	PJM client manager	

<https://pjm.com/planning/service-requests/application-and-forms>

Presenter:

Josh Stephenson, Sr. Engineer,
Interconnection Projects

Joshua.Stephenson@pjm.com

Questions:
NextGen Support

nextgen-support@pjm.com



Member Hotline

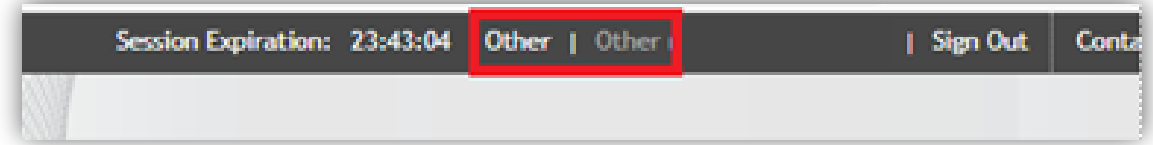
(610) 666 – 8980

(866) 400 – 8980

custsvc@pjm.com

Appendix

- Information displayed in NextGen is based on the user's company and role in Account Manager.
- NextGen roles are only available for users logged in under a member or non-member company. Users registered under "Other" companies cannot request access.
- If your company doesn't have a PJM account, [submit a request](#) to create either a member or non-member account.



Account Manager

Account Manager is a tool used to create accounts and request and grant access to PJM's tools and website.

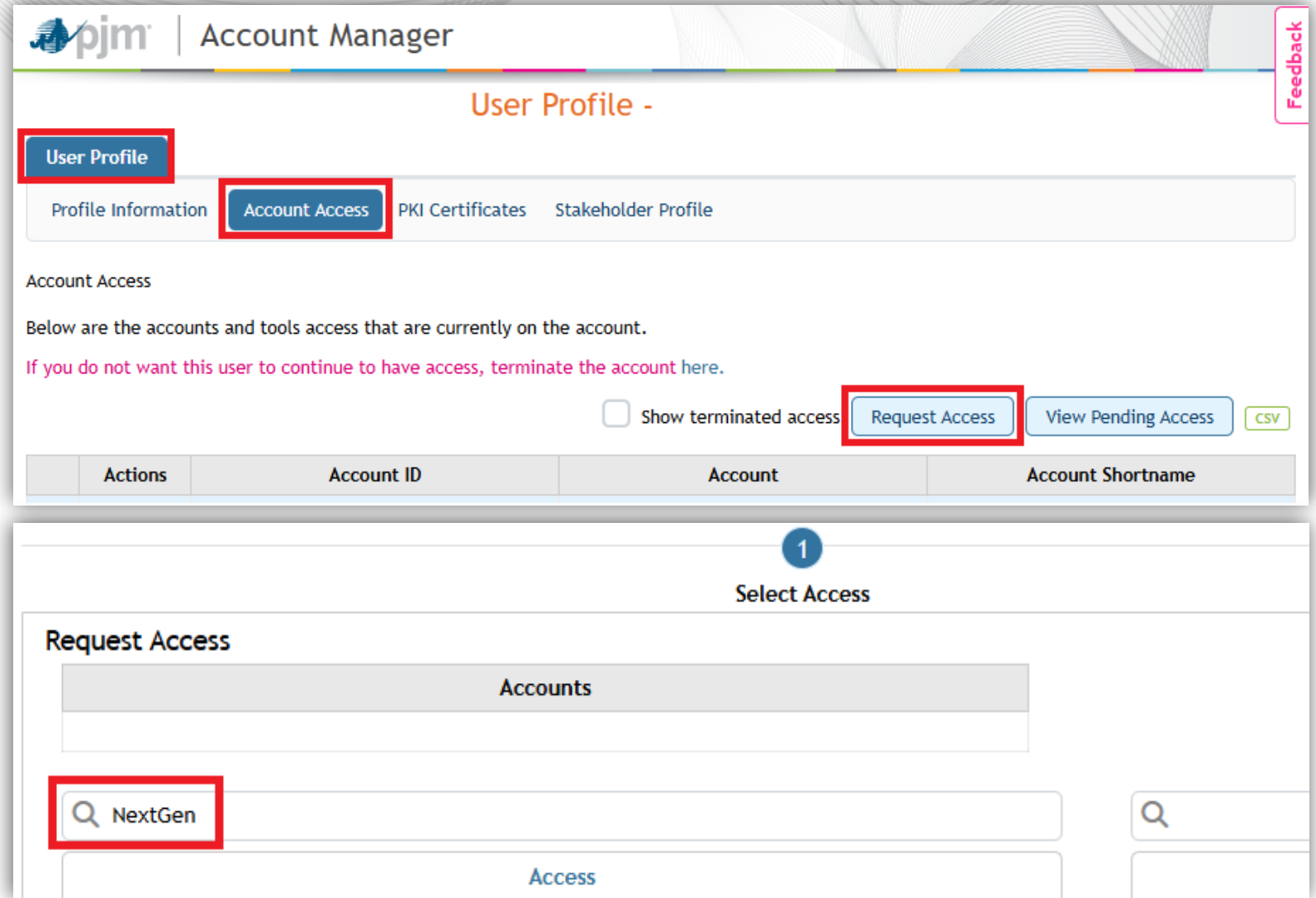
Production: [Sign In](#) | [Register](#)

Train Environment: [Sign In](#) | [Register](#)

If your company is not a member of PJM or your company is not listed when registering for an account, [request a company account be created.](#)

Steps to request access:

1. Select User Profile
2. Select Account Access
3. Select Request Access
4. Search NextGen
5. Select the appropriate role. Details on next slide.



The screenshot shows the PJM Account Manager interface. The top navigation bar includes the PJM logo and the text "Account Manager". Below this, the "User Profile" section is highlighted with a red box. Under "User Profile", the "Account Access" tab is also highlighted with a red box. The "Account Access" section contains a message: "Below are the accounts and tools access that are currently on the account." and a link: "If you do not want this user to continue to have access, terminate the account here." There is a checkbox for "Show terminated access" and a "Request Access" button, which is highlighted with a red box. To the right of the "Request Access" button is a "View Pending Access" button and a "CSV" button. Below this is a table with columns: "Actions", "Account ID", "Account", and "Account Shortname". The table is currently empty. Below the table, there is a "Select Access" section with a "Request Access" button, which is highlighted with a red box. Below the "Request Access" button is a search bar with the text "NextGen" and a magnifying glass icon, which is also highlighted with a red box. Below the search bar is a table with columns: "Accounts" and "Access". The table is currently empty.

Several roles are available for NextGen users in Account Manager:

- NextGen Read Only – Users can view information within NextGen but cannot edit nor submit applications
- NextGen Read/Write – Users may view and edit information within NextGen and submit applications
- NextGen Agent – Users may view and edit project data within NextGen but cannot submit new applications

For any additional questions and guidance, please contact your company Account Manager (CAM) or custsvc@pjm.com