Generation Transfer Request User Guide

Revision: 03

Effective Date: 04/10/2025

For Public Use

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Approval

Mary Hall, Manager

Client Management Department

Current Revision

Revision 03 (04/10/2025)

Updated user guide to include:

- Requesting Generator Transfers through the Resource Tracker tool

Overview/Summary

This user guide is intended to help the Member and/or market entity desiring to transfer a generation resource within the PJM footprint. The transfer process is described in further detail in Manual 14D, sections 2.2 and 5.7. Each generation transfer is unique and requires the PJM Client Management Department to ensure all proper and correct information is obtained from both the Transferor (Member selling the resource or the "**From**" entity) and Transferee (entity buying the resource or the "**To**" entity) prior to the requested effective date of the transfer.

The following provides explanation for each item required to request a generation transfer. Generation transfers can be initiated by individuals with Resource Tracker access to the PJM account that the unit(s) is (are) currently located in. More information on the Resource Tracker tool and how to request access, if needed, can be found here: Resource Tracker.

Resource Tracker Request

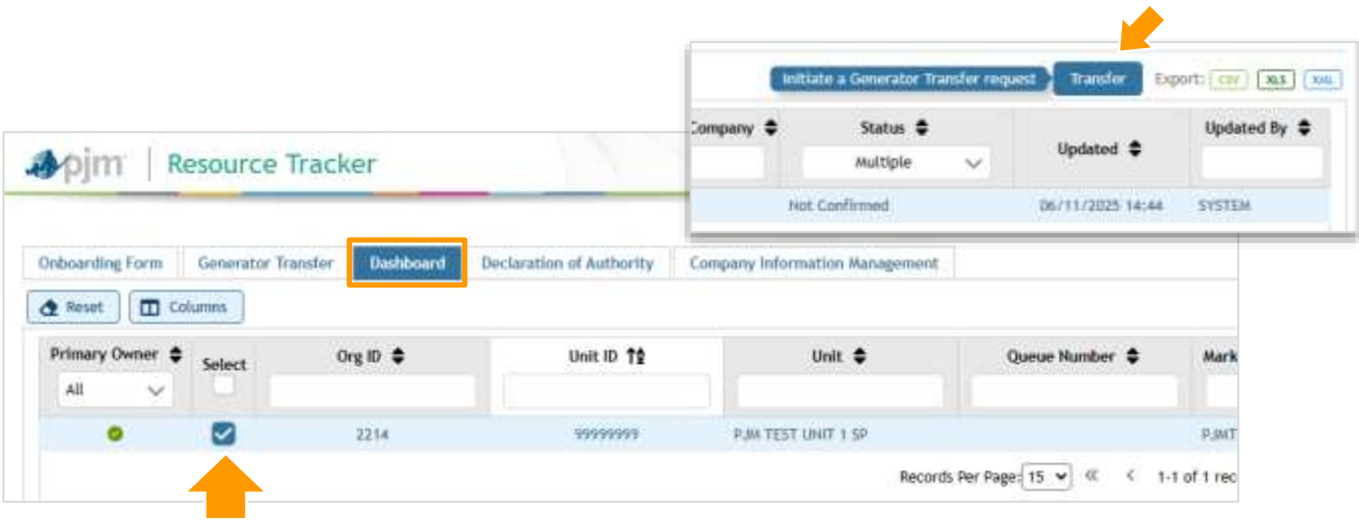
A completed request to PJM with a requested time frame of at least 45 days notification prior to the requested effective date of the transfer within the PJM systems is required. The Transferor, or the "**From**" party, may submit the request. All information must be provided in the tool in accordance with this user guide. If multiple resources are requested to be transferred, so long as the information on the form is the same for all resources being transferred, multiple units should be added to a single transfer request. If one answer or information data point is different on the form, then a separate request is required that pertains to that resource(s). For example, *Resource 1, Resource 2* and *Resource 3* – all are being transferred to the same Member/company or "**To**" party and will all transfer on the same date, but each unit will go into a different subaccount – New Main Account (res1), New Main Account (res2), New Main Account (res3). This requires a separate transfer for each resource. However, if all three units are going to be transferred into New Main Account and all other desired transfer details are the same, this transfer can be accomplished with a single transfer. Please reach out to PJM Client Management with any transfer-related account/subaccount questions or if you are unclear on whether your desired transfer can be accomplished in a single transfer or requires multiple transfer requests.

Transfer Request Initiation

1 To initiate the transfer of a generating unit, a user with access to the account that the unit is located in should log in to Resource Tracker.

2 Once on the **Dashboard** tab, a user can select one or more units using the selection box in the left column.

3 Once desired unit(s) is (are) selected, click the **Transfer** button.

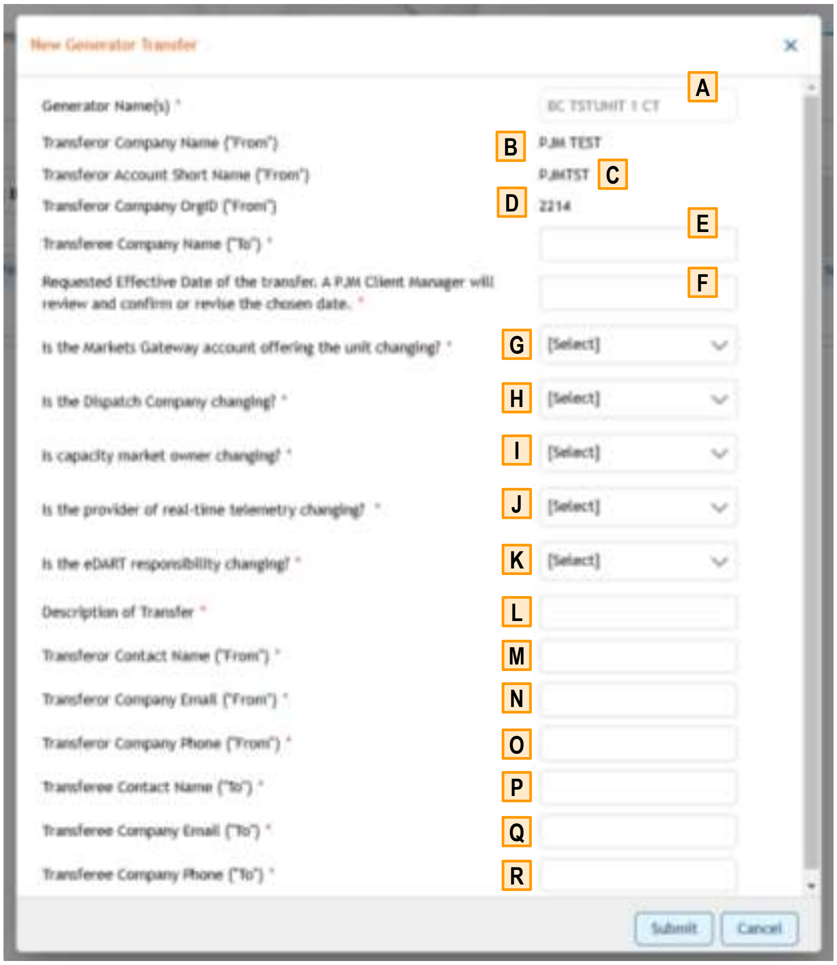


High-Level Transfer Details

Transferor or "From" Party Tasks

New Generator Transfer Form

1 After the **Transfer** button is clicked, the current, or "**From**," party will be presented with the following fields (required fields are noted with a red asterisk):



- **A. Generator Name(s)** will be autofilled if the transfer is for a single unit. If the transfer is for multiple units, the customer should enter a transfer name that describes the units at a high level; for example, "Resource Name 1–3."
- **B. Transferor Company Name ("From") –** Member that currently owns the resource(s) – will be filled
- **C. Transferor Account Short Name ("From") –** Member account that currently owns the resource(s) – will be filled
- **D. Transferor Company OrgID ("From") –** OrgID of member that currently owns the resource(s) – will be filled
- **E. Transferee Member/Company Name ("To") –** Member/company that will own the resource(s) after the transfer
- **F. Requested Effective Date of the transfer –** Target operating day for which the resource(s) will transfer for settlements purposes. *Note – If changing, Markets Gateway access for units is typically set for the day prior to the transfer date to allow for day-ahead bidding. If either party desires to set the Markets Gateway access date differently, please discuss with the PJM client manager handling the transfer **prior to submitting this initial information**.
- **G. Is the Markets Gateway account offering the unit changing? –** Will the energy market account in which the resource is currently modeled change?
- **H. Is the Dispatch Company changing? –** Will the company/party dispatching the resource change?

I. **Is capacity market owner changing? –** Will the capacity market account in which the resource is currently modeled change? *Note – capacity changes are noted for informational purposes only in the generation transfer process; please contact the RPM group to coordinate necessary changes.

J. **Is the provider of real-time telemetry changing? –** Will the company/party that provides real-time telemetry change?

K. **Is the eDART responsibility changing? –** Will the eDART account be changing?

L. **Description of Transfer –** Summary of change or any additional information

M. **Transferor Contact Name ("From") –** Contact name from Member/party that currently owns the resource(s) that will coordinate with PJM on the transfer

N. **Transferor Company Email ("From") –** Contact email from Member/party that currently owns the resource(s) that will coordinate with PJM on the transfer

O. **Transferor Company Phone ("From") –** Contact phone number from Member/party that currently owns the resource(s) that will coordinate with PJM on the transfer

P. **Transferee Contact Name ("To") –** Contact name from Member/party that will own the resource(s) that will coordinate with PJM on the transfer

Q. **Transferee Company Email ("To") –** Contact email from Member/party that will own the resource(s) that will coordinate with PJM on the transfer

R. **Transferee Company Phone ("To") –** Contact phone number from Member/party that will own the resource(s) that will coordinate with PJM on the transfer

2 After all required fields are filled, click **Submit**:

3 After submission, a confirmation notice will appear indicating that the form has been submitted to PJM for review:

A PJM client manager will review the submission, assign the transfer request to the new account and pass the transfer to the "**To**" party for additional information.

Transferee or "To" Party Tasks

The "**To**" party will receive an email to notify them that a transfer has been initiated, and they are to complete the necessary items required for the requested transfer:

> Dear [Company and Account Name],
>
> You have been identified as the PJM Markets Contact for the following unit(s). Please access the Generator Transfer form in Resource Tracker, where you can enter PJM, market-related, tool and other required data related to this unit. Further detail and instructions related to the fields are available on the form.
>
> - [Transferring Unit(s) Name(s)]
>
> If you have any questions, please reach out to Client Manager Project Team.

1. A user with access to the account that the unit is being transferred to should log in to Resource Tracker and click on the **Generator Transfer** tab – the transferring unit(s) will be visible:

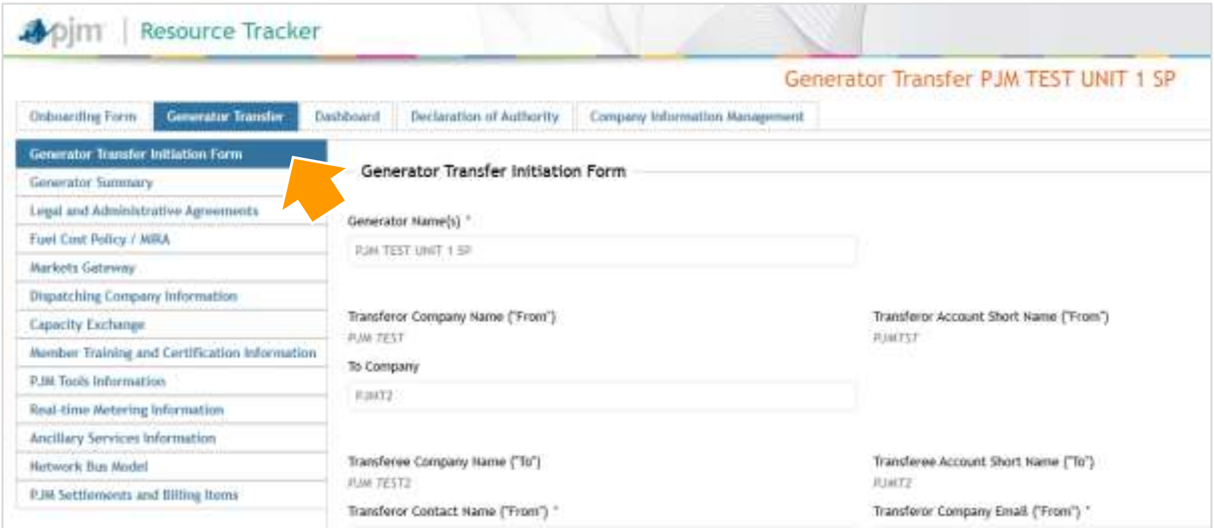
2. The user can then click on the name of the unit(s) being transferred to begin to fill out the necessary details of the transfer.

A user can save progress at any point by clicking **Save** button at the bottom of the page:

3. A banner will appear to indicate field data has been saved:

Generator Transfer Initiation Form

The **Generator Transfer Initiation Form** tab contains data related to the parties and accounts involved in the transfer – there are no required fields for the "**To**" party to fill out.



Generator Summary

The **Generator Summary** tab contains unit information and does not require any fields to be filled out.

Legal and Administrative Agreements

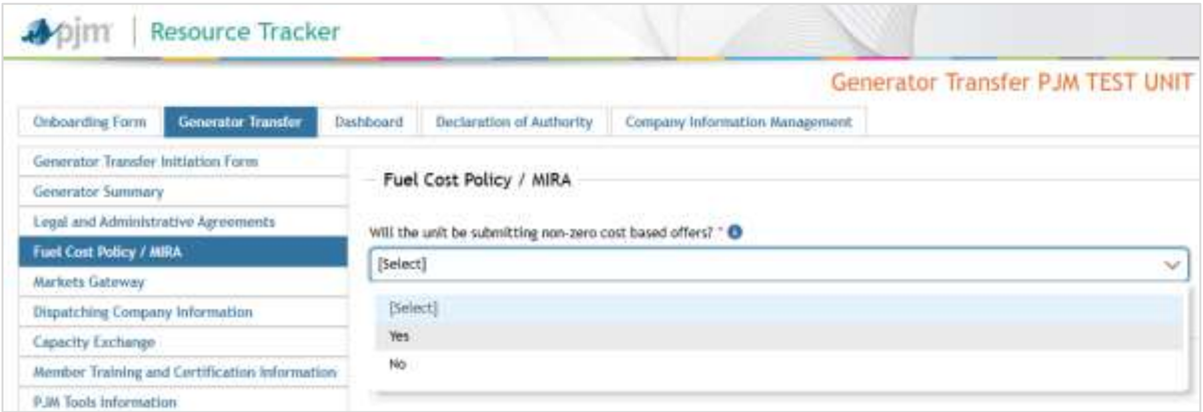
The **Legal and Administrative Agreements** tab contains information about necessary agreements, additional site and unit details, and other related information. This tab does not require input from the "**To**" party.

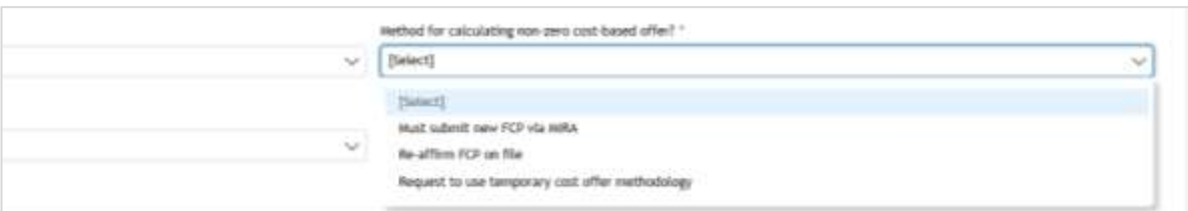
Fuel Cost Policy / MIRA

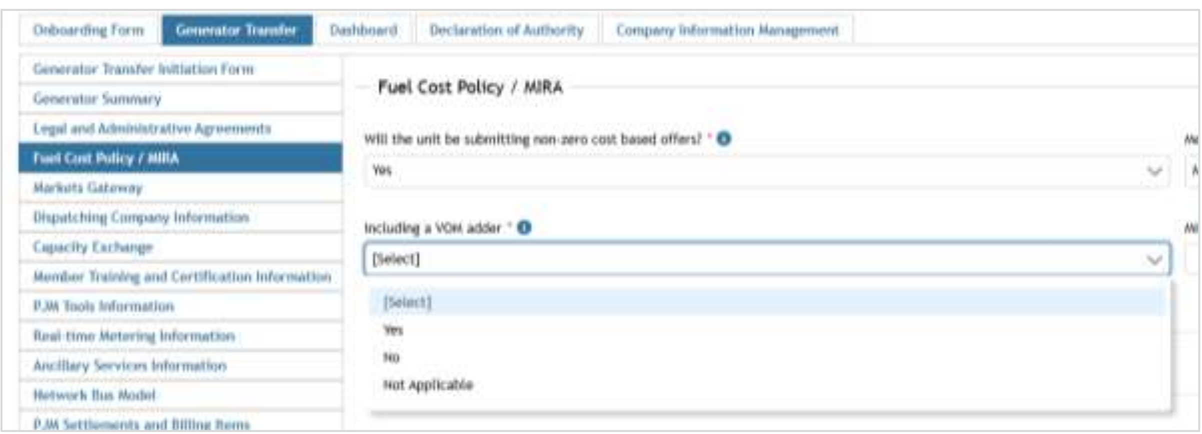
The **Fuel Cost Policy / MIRA** tab contains a single field that the "**To**" party must choose. Parties can reference the following for additional information regarding this field/option:

- Market Sellers that offer a generation resource, including external capacity and energy-only resources, that **submit a non-zero cost-based offer** (including negative offers) in the PJM Interchange Energy Market, must have a PJM-approved Fuel Cost Policy or indicate to PJM that they would like to utilize the temporary cost offer methodology consistent with fuel type in accordance with Manual 15 and the Operating Agreement, Schedule 2.
- To reaffirm existing FCP or request to use the temporary cost offer methodology, Market Seller must:
  - Email FuelCostPolicyAnalysis@pjm.com and Cc: MMU_Energy_Offers_Review@monitoringanalytics.com to indicate their intention.
  - Upload the policy into MIRA.
- Information on Fuel Cost Policy requirements as well as frequently asked questions can be found at (Home > Markets & Operations > Energy Market > Fuel Cost Policies).

- MIRA – Monitoring Analytics application to collect fuel data. Questions should be directed to Monitoring Analytics – mira@monitoringanalytics.com.
- If the generator is transferring between subaccounts of the same member, they are required to transfer their FCP to the new subaccount.

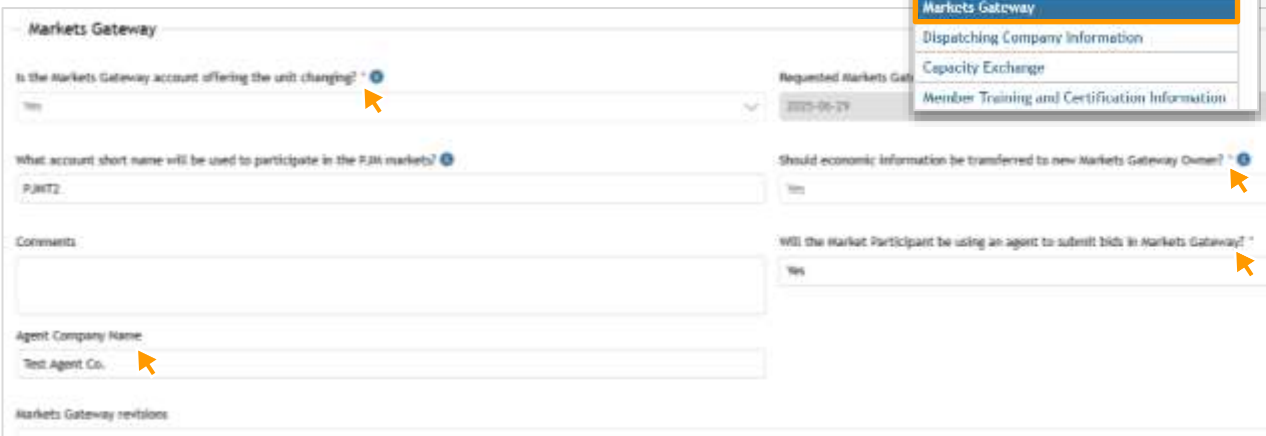






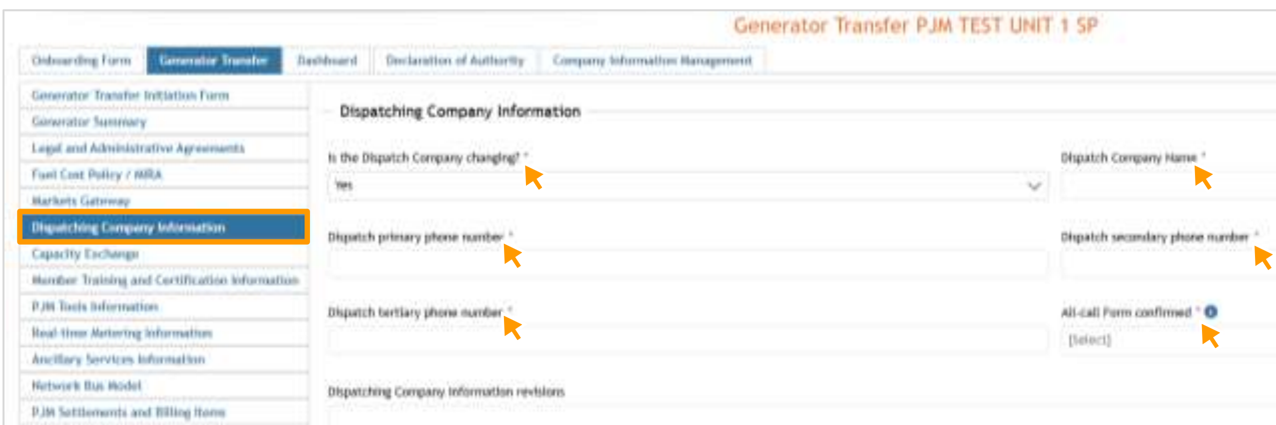
Markets Gateway

The **Markets Gateway** tab contains fields that will have to be filled out by the "**To**" party if there are changes taking place as a result of the transfer:



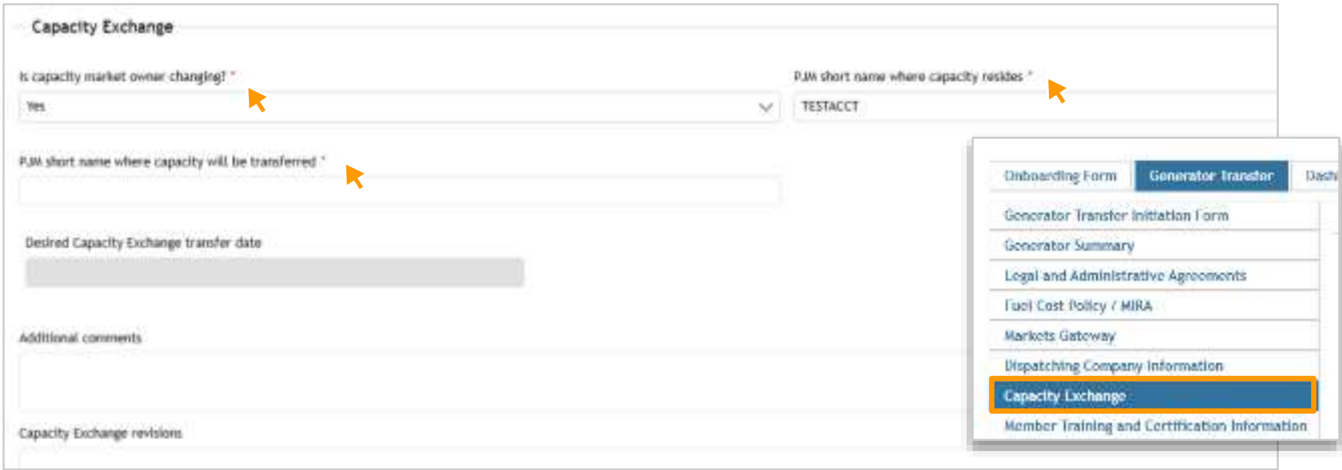
Dispatching Company Information

The **Dispatching Company Information** tab contains fields that will have to be filled out by the "**To**" party if there are changes taking place as a result of the transfer:



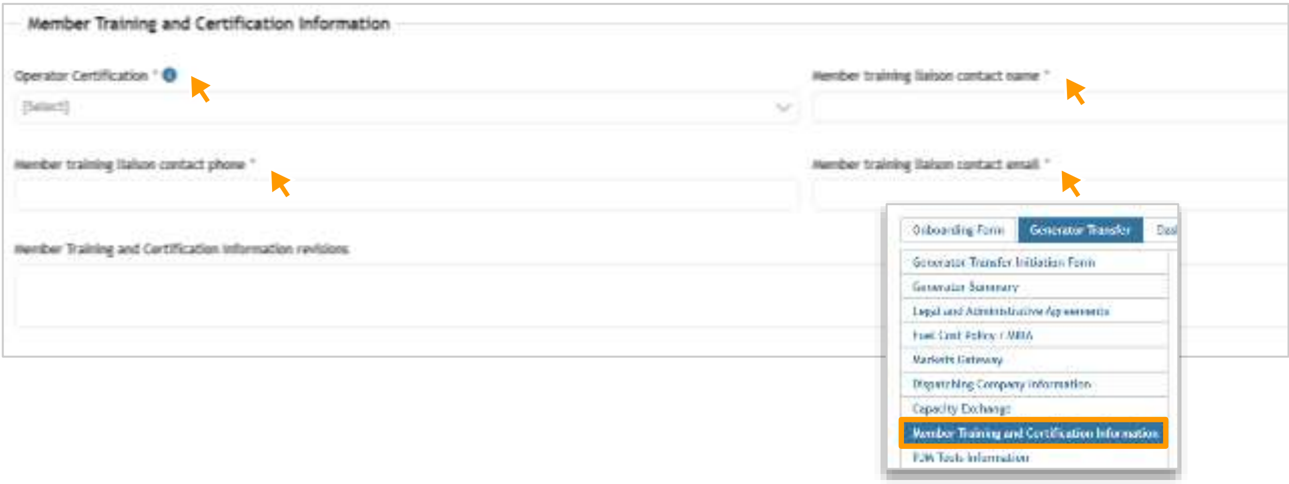
Capacity Exchange

The **Capacity Exchange** tab contains fields that will have to be filled out by the "**To**" party if there are changes taking place as a result of the transfer. *Note – capacity changes are noted for informational purposes only in the generation transfer process; please contact the [RPM group](#) to coordinate necessary changes.



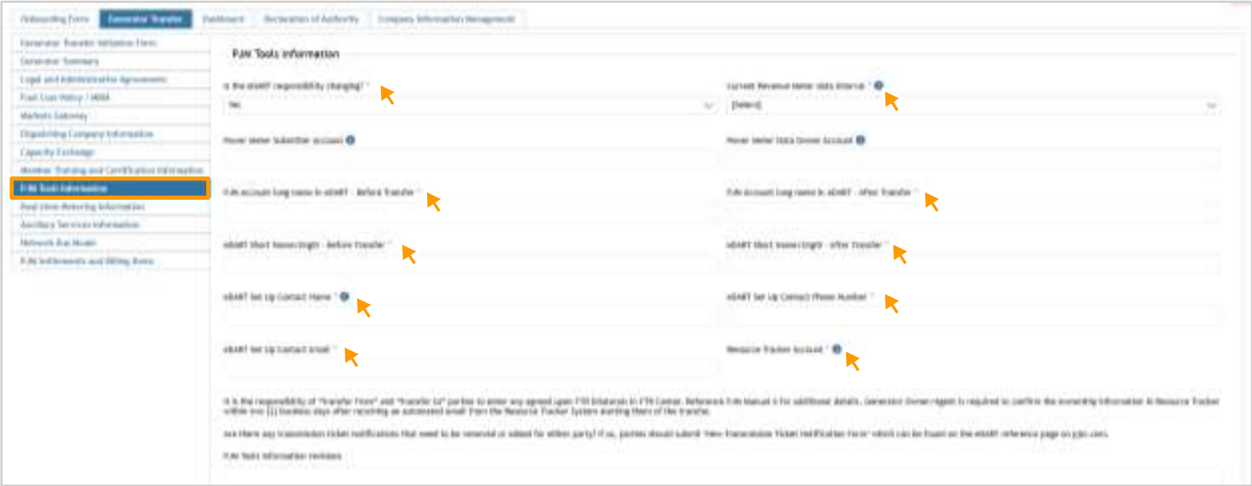
Member Training and Certification Information

The **Member Training and Certification Information** tab contains fields that will have to be filled out by the "**To"** party if there are changes taking place as a result of the transfer.



PJM Tools Information

The **PJM Tools Information** tab contains fields that will have to be filled out by the "**To**" party if there are changes taking place as a result of the transfer.

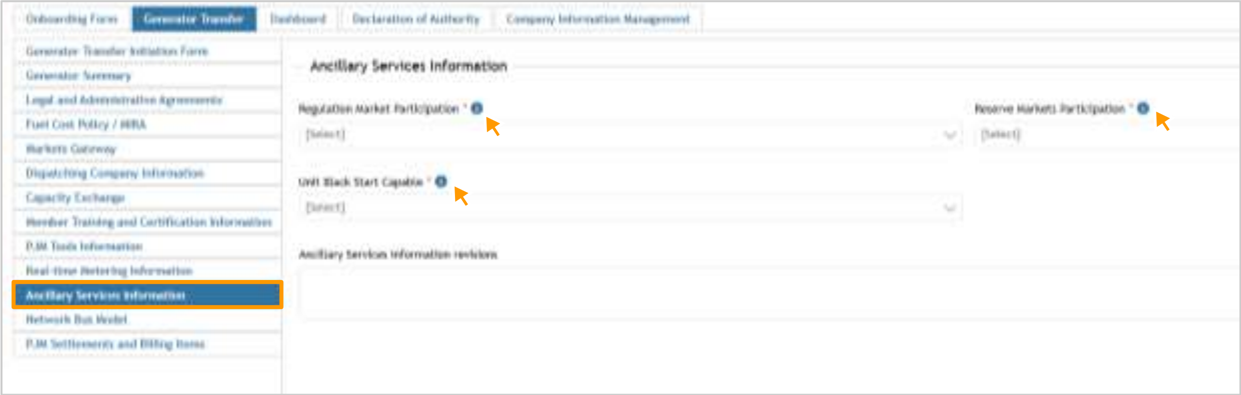


Real-time Metering Information

The **Real-time Metering Information** tab contains fields that will have to be filled out by the "**To**" party if there are changes taking place as a result of the transfer.

Ancillary Services Information

The **Ancillary Services Information** tab contains fields that will have to be filled out by the "**To**" party if there are changes taking place as a result of the transfer.



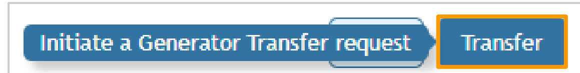
Network Bus Model

The **Network Bus Model** tab contains information about the unit(s) – this tab does not require any data be entered.

PJM Settlements and Billing Items

1 The **PJM Settlements and Billing Items** tab contains fields that will have to be filled out by the "**To**" party if there are changes taking place as a result of the transfer.

2 After all required fields have been filled out on all tabs, click **Transfer**.



3 A banner will appear to indicate the transfer request has been submitted to PJM Client Management for review.

4 The transfer request will now show a status of "submitted" on the **Generator Transfer** tab in Resource Tracker:

A PJM client manager will reach out within three to five business days to confirm receipt of the transfer request, review details and confirm dates. They may also ask for additional information if needed.

Revision History

Revision 00 (2/23/2018)

User guide created

Revision 03 (04/10/2025)

Resource Tracker transfer details added