



# Load Reconciliation Poll Results

Market Settlements Subcommittee  
January 16, 2020

- The purpose of the poll is to quantify support for the one package in the Load Reconciliation Matrix
- 56 responses received, 14 unique responders
- Poll format
  - Problem statement summary
  - Summary of Package A
  - “Do you support Package A?”
    - Yes/No/Abstain
  - “Do you prefer to make a change or retain the status quo?”
    - Make a Change/Retain Status Quo/Abstain
  - Comments

## Background:

PJM is currently working on a technology upgrade project for the Market Settlement Calculation System. Through this project, the opportunity is available to remove the stand alone load reconciliation charge calculations and instead factor the reconciled megawatts directly into the billing calculations as an adjustment to the applicable previously billed month.

This would result in a consistent set of settlement calculations, providing the following benefits:

- Standardize the treatment of load reconciliation across all applicable billing line items
- Standardize load reconciliation settlement data on Market Settlements Reports
- Reduce the number of line items on the monthly bill by eliminating the load reconciliation billing line items
- Eliminate any confusion between source month and billing month for reruns related to load reconciliation billing
- Improve settlements calculations efficiencies for PJM settlements staff
- Minimize the number of billing line item transfers that need to be managed by members for a specific charge type
- Unify balancing operating reserve deviation and reliability charges under the same settlement calculation method

## Summary of Package A

**Data Submission Deadline** – Increase the time for submittals to approximately 75 days, with the final day being a business day.

**Settlement Invoicing Timing** – Load Reconciliation would be settled on a 3 month lag.

**Impact to Billing Line Items** – There would be no standalone load reconciliation Billing Line Items. All Load Reconciliation would be settled as adjustments to prior months.

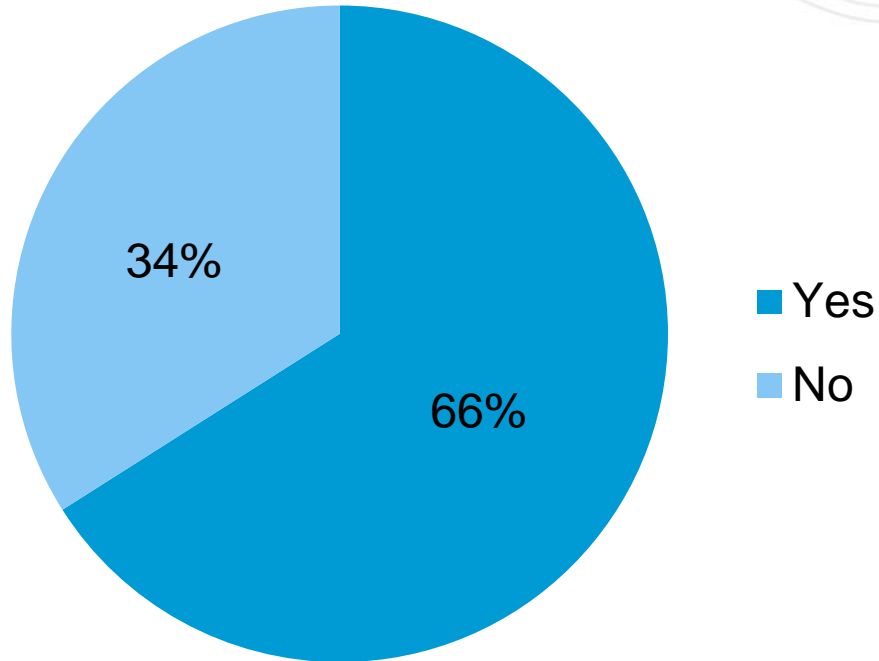
**InSchedule Impacts** – EDC Members would have the choice to submit their load reconciliation delta to InSchedule or their final load value to InSchedule, separate from the initial value submission. The format would be hourly megawatt values to 3 decimal places via text file format. Reporting in InSchedule would remain status quo.

**MSRS Reporting Impacts** – The existing Load Reconciliation specific reports would not be effective going forward. New non-settlement report(s) would be created for Load Reconciliation MWh. Charges and credits would be removed from existing reports, and reconciliation billing determinants and MWh values would be maintained.

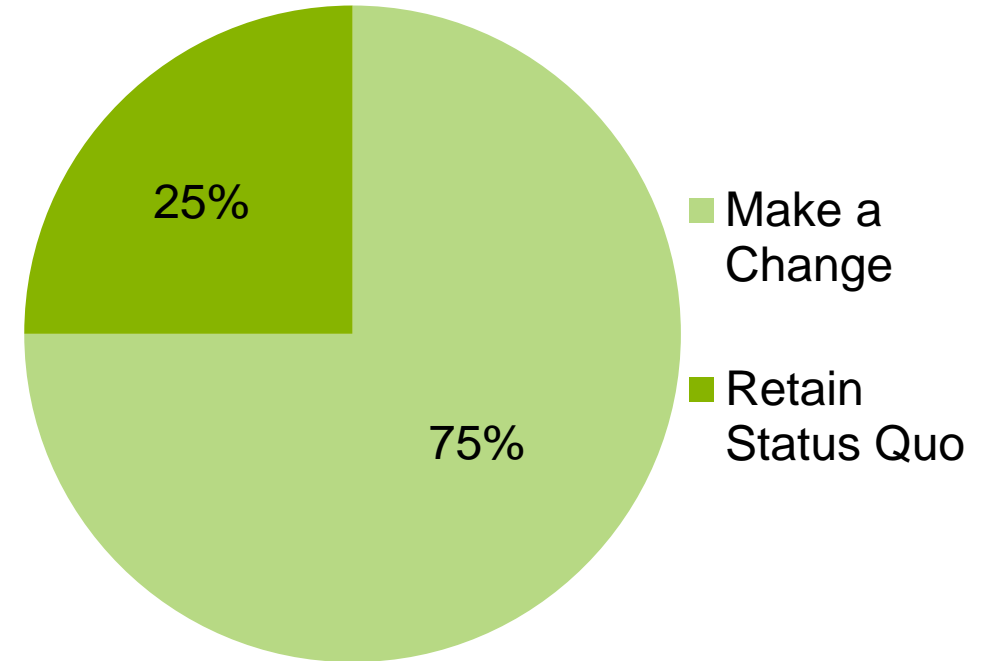
**Invoice Impacts** – There would be no standalone Load Reconciliation Billing Line Items. All Load Reconciliation would be settled as adjustments to prior months.

**Billing Line Item Transfer Impacts** – Separate Billing Line Item Transfers for load reconciliation would no longer be required if Load Reconciliation is settled as adjustments to prior months.

### Do you support Package A?



### Do you prefer to make a change or retain the status quo?



- Not in favor of pushing out settlement to a 3 month lag
- We have concerns with the changes to both the data submission deadline and the settlement invoicing timing. We are concerned that the delay will cause issues for other downstream processes. The proposal would also put costs onto our EDCs that we don't think are worth the benefits of the proposed change.

- Comments
- Suggestions
- Questions
- Next Steps