

## Billing Line Item Transfer Tool Frequently Asked Questions

Below is a list of frequently asked questions related to the Billing Line Item (BLI) Transfer Tool. If you have a question that has not been covered below, please consult the [Billing Line Item Transfer Tool User Guide](#) or contact the Tools Refresh Team at [ToolsRefresh@pjm.com](mailto:ToolsRefresh@pjm.com).

- 1) What is a Billing Line Item Transfer? What does it do?
  - a. Billing Line Item Transfers move credits or charges associated with specific PJM Billing Line Items from one party to another. BLI Transfers have no impact on the calculation of member credit obligations.
- 2) How do I access the Billing Line Item Transfer Tool?
  - a. To access the Billing Line Item Transfer Tool, Market Participants must have a valid eSuite user account (assigned by their Customer Account Manager (CAM)) with one of the following roles assigned:
    - i. Billing Line Item Transfer Read Only - Users that only view Billing Line Item Transfer information
    - ii. Billing Line Item Transfer Read/Write – Users that can create, edit, terminate, approve, and decline Billing Line Item Transfers
- 3) I already see BLI Transfers in my account. Where did they come from?
  - a. All existing Billing Line Item Transfers that were created using the Declaration of Authority form (DOA) will be available to be viewed/edited in the Billing Line Item Transfer Tool. These legacy Billing Line Item Transfers will expire on May 31, 2015 or on their original termination date, if earlier, but may be extended or shortened using the Tool.
- 4) Who can initiate a Billing Line Item Transfer?
  - a. Either the “To” or the “From” party can initiate the transfer of BLIs. However, the counterparty must confirm the BLI Transfer prior to it being considered in PJM’s billing processes.
- 5) What is the minimum duration of a Billing Line Item Transfer?
  - a. A Billing Line Item Transfer must span one or more entire months. Partial months cannot be accommodated.
- 6) What is the maximum duration of a Billing Line Item Transfer?
  - a. A Billing Line Item Transfer can be effective for up to 18 months after the date it is created or edited. BLI Transfers may be extended or shortened after they are created, but any edits must be confirmed by both parties.
- 7) How far ahead of time can we update or change the expiration date?
  - a. You can update the expiration date at any time; however the max date at any time is 18 months in the future.
- 8) It is the middle of the month. Can I retroactively transfer Billing Line Items?
  - a. A Billing Line Item Transfer may be submitted and approved to be effective retroactively to the first day of the current month. For example, if today is October 29, transactions

may be submitted to become effective on October 1. Choosing a retroactive effective date may result in financial true ups of previous weekly bills applicable to the current month.

- 9) Why do I see a BLI Transfer with an “Expired” status?
  - a. If a new Billing Line Item Transfer is not approved by both parties by the last day of the month for which the BLI Transfer is set to begin, the BLI Transfer will become “Expired” and will not affect billing for either party.
- 10) How do you modify or cancel a Line Item that might have been erroneously billed?
  - a. You can edit an existing, approved Billing Line Item Transfer by clicking on the associated “pencil” icon located in the “Actions” column on the Dashboard. Approved BLI Transfers that begin in the current month or future months can have their effective and termination dates changed. Approved BLI Transfers with effective dates prior to the current month can only have their termination dates changed.
- 11) Do both parties have to agree to the Cancellation of the line item?
  - a. Yes. Both parties must agree to the cancellation of a BLI Transfer that is already approved. If the counterparty does not approve the edit by the last day of the planned effective month, the BLI Transfer will revert to the previous “Approved” status, and any edits to the original will be removed.
- 12) Will the system notify me when there is a BLI Transfer that requires my attention?
  - a. No. At this point participants are asked to notify their counter party in the event new BLI Transfers or updates to existing BLI Transfers are made in the system. In addition, participants should be aware of the termination date of the BLI Transfers in order to submit an extension, if necessary.
- 13) How can I tell which BLI Transfers will be expiring soon?
  - a. Expiration dates for all BLI Transfers are shown in the Tool. If the BLI Transfers are not already sorted by expiration date, you may sort them by clicking on the icon above that column in the listing.
- 14) I am trying to create a new transfer, but see an error in the bottom of my browser window after selecting my counterparty.
  - a. Please check the browser you are using to access the tool is compatible with PJM’s updated tool standards. The list of supported browsers is available [here](#).
- 15) Are there any billing line items that cannot be used in the Billing Line Item Transfer tool?
  - a. Billing line items 1980 and 2980 (Miscellaneous Bilateral Transfers) cannot be used the Billing Line Item Transfer tool.