

Summary of M-03A Rev 12 Changes

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Overview of Changes:

- Section 2.2: Reference added for new Appendix E: Checklist For New Equipment Energization Process.
- Appendix E: New appendix added for Checklist For New Equipment Energization Process.
- New Exhibit E1: Checklist For New Equipment Energization Process
- Appendix F: Previously Appendix E, Acronyms & Descriptions, now Appendix F.
- Section 4.4: Reference added to Manual 01 for tie line reference and requirements; text updated for accuracy.

- Guide ensuring all PJM related requirements related to model update process (from planning to energization) met
- Includes manual references

Appendix E: Checklist For New Equipment Energization Process

The following checklist has been created for use by Transmission Owners as a guideline for what is required by PJM throughout the baseline/supplemental transmission upgrade process from inception to energization.

Project Phase ¹	Task	Delivery	Timeframe	PJM Manual Reference	PJM Contact Department	Comments	Online Training link
P	Submit minimum required rating (lines and xfms) – not required for supplemental projects	Email to contact	Before Project Approval	M-14B	Transmission Planning		
P	Submit planning model parameters	IDEV/Project File	Before Project Approval	M-14B	Transmission Planning		
P	Submit planning contingency changes	CON File	Before Project Approval	M-14B	Transmission Planning		
P	Submit breaker diagrams	Email to contact	Before Project Approval	M-14B	Transmission Planning		
P	Project Description/Cost/Time Estimate	Email to contact	Before Project Approval	M-14B	Transmission Planning		
EP	Construction Schedule/Project Sequence	Email to contact	6-8 months prior to UC phase	M-14C	Infrastructure Coordination		
EP	Submit projected outage timeframes	Email to contact	6-8 months prior to UC phase	M-14C	Infrastructure Coordination		
UC	Quarterly updates	Email to contact	Throughout UC phase	M-14C	Infrastructure Coordination		

- Checklist being added to manuals 3A, 14B & 14C
- Reviews to be conducted at DMS, SOS, OC, PC & MRC

Project Phase ¹	Task	Delivery	Timeframe	PJM Manual Reference	PJM Contact Department	Comments	Online Training link
EP/UC	Submit as built impedance and all other applicable equipment parameters (i.e. Tap Settings, Capacitor Size etc.)	eDART – Network Model Ticket	6-12 months prior to IS	M-03A; 3.2	Model Management		
EP/UC	Submit final In-Service Date	eDART – Network Model Ticket	6-12 months prior to IS	M-03A; 3.2	Model Management		
EP/UC	Submit target build date	eDART – Network Model Ticket	6-12 months prior to IS	M-03A; 3.2	Model Management		
EP/UC	Submit equipment names	eDART – Network Model Ticket	6-12 months prior to IS	M-03A; 3.2	Model Management		
EP/UC	Submit final one-line diagrams	eDART – Network Model Ticket	6-12 months prior to IS	M-03A; 3.2	Model Management		
EP/UC	Submit Transmission Outage Tickets	eDART	2-12 months prior to IS	M-03; 4.2	Transmission Operations		
EP/UC	Submit Ratings (Lines and Transformers)	eDART – TERM	No later than 2 weeks prior to IS	M-03A; 3.2	Real-Time Data Management TERMTickets@pjm.com		
EP/UC	Submit Telemetry	Email	No later than 2 weeks prior to IS	M-03A; 3.2	Real-Time Data Management PJMTelemetrySupport@pjm.com		
UC/IS	Notification of In-Service status	Email	Once facility is energized	M-14C	Infrastructure Coordination		

¹Key: **P** = Pending (or before Pending), **EP** = Engineering and Procurement, **UC** = Under Construction, **IS** = In-Service

Exhibit E1: Checklist For New Equipment Energization Process

The following required changes were made to Manual 3A Section 4.4: Tie Line Processing:

- Reference to PJM Manual 1 Control Center Requirements for all Tie Line references and metering requirements
- Change in timeline for reporting tie line changes (from 30-45 days to **60-90** days)
- Removal of internal PJM process steps

Appendix

- Information on PJM requirements for Transmission Owners throughout the process of getting new facilities modeled and energized is located in several different manuals.
- The entire process passes through several divisions/departments at PJM
- PJM is currently reviewing internal processes related to baseline/RTEP and supplemental transmission upgrades in an effort to close gaps and promote clarity
- As a result of the review, a cross-divisional, high level 'checklist' has been created for use by the Transmission owners as a guideline for what is required by PJM throughout the baseline/supplemental transmission upgrade process from inception to energization

Column Heading	Description
Project Phase	Each row of the checklist will be linked to one of the following Project Phases P = Pending (or before pending status) EP = Engineering and Procurement UC = Under Construction IS = In-Service
Task	What is needed from the Transmission Owner
Delivery	How the task information should be sent to PJM (i.e. – email, eDART etc.)

Column Heading	Description
Timeframe	the range of time during which the task must be completed
PJM Manual Reference	the associated manual where a detailed explanation of the task requirement can be found
PJM Contact Department	the department at PJM to contact/work with for the task
Online Training Link**	a link to the associated online training module explaining how to complete the task **training will be complete by end of Q3 2016 after which links will be added and updated version will be posted