



Manual 40, Training and Certification Requirements

Kim Sauerwine
System Operator Training
System Operation Subcommittee
December, 2016

- Annual Review per PER-005
- Section 1.6 “Implementation of Program Activities”
 - Added Grid Security Drills as another component of the continuing education offerings
- Section 3.2 “Entity Training and Certification Requirements”
 - Added language to reflect how initial training requirements may be completed.
 - Added language to include open/required JIT training to Initial Training Requirements.

- Section 3.2 “Entity Training and Certification Requirements” (cont’d)
 - Changed the grace period for completing Initial Training and Certification Requirements from 12 months to 6 months for MOC Generation Dispatchers and Small Generation Plant Dispatchers (Section 3.2.2 and 3.2.4)
- Section 3.3: “Compliance Monitoring Process for Training and Certification Requirements”
 - Added clarification to items which are monitored during monthly and annual compliance checks

- Section 4: “PJM Operator Training”
 - Minor formatting and clarifying changes throughout
- Section 4.1 “Overview”
 - Removed statement for customizing each operator’s training program
- Section 4.2 “Systematic Approach to Training”
 - Removed Instructor observations and critiques as part of the Evaluation Phase of the Systematic Approach to Training

- Section 4.6 “Power Director Initial Training and Qualification Requirements”
 - Added Remedial Action Schemes (RAS)
- Section 4.7 “Reliability Engineer Initial Training and Qualification Requirements”
 - Removed Voltage Stability Analysis (VSA) tool references
 - Removed region specific written test reference
- Section 4.8 “Shift Supervisor Initial Training and Qualification Program”
 - Removed Voltage Stability Analysis (VSA) tool references
 - Removed HR leadership courses that are no longer offered (Emerge, Communication and Influencing Skills)

- Section 4.9 “PJM System Operator Continuing Training Program”
 - Removed the Daily Review Team Process which is no longer a control room function.
 - Added Cyber and Physical Security Drills to the Simulator use.
- Section 4.12 “PJM Human Performance Program”
 - Added CRM tools of Situational Awareness, Effective Shift Turnover, Planning and Decision Making, Workload Management, Monitor/Cross-Check, Communication, Leadership Effectiveness.
 - Added a new Figure 4

- DTS – First read – 11/15/16
Endorsement – 12/20/16
- SOS – First read – 11/30/16
Endorsement – 12/21/16
- OC - First read – 12/13/16
Endorsement – 1/10/17
- MRC – First read – 12/22/16
Second read – 1/26/17
- Manual effective date 2/1/17