



Manual 02: Transmission Service Request Revision 16

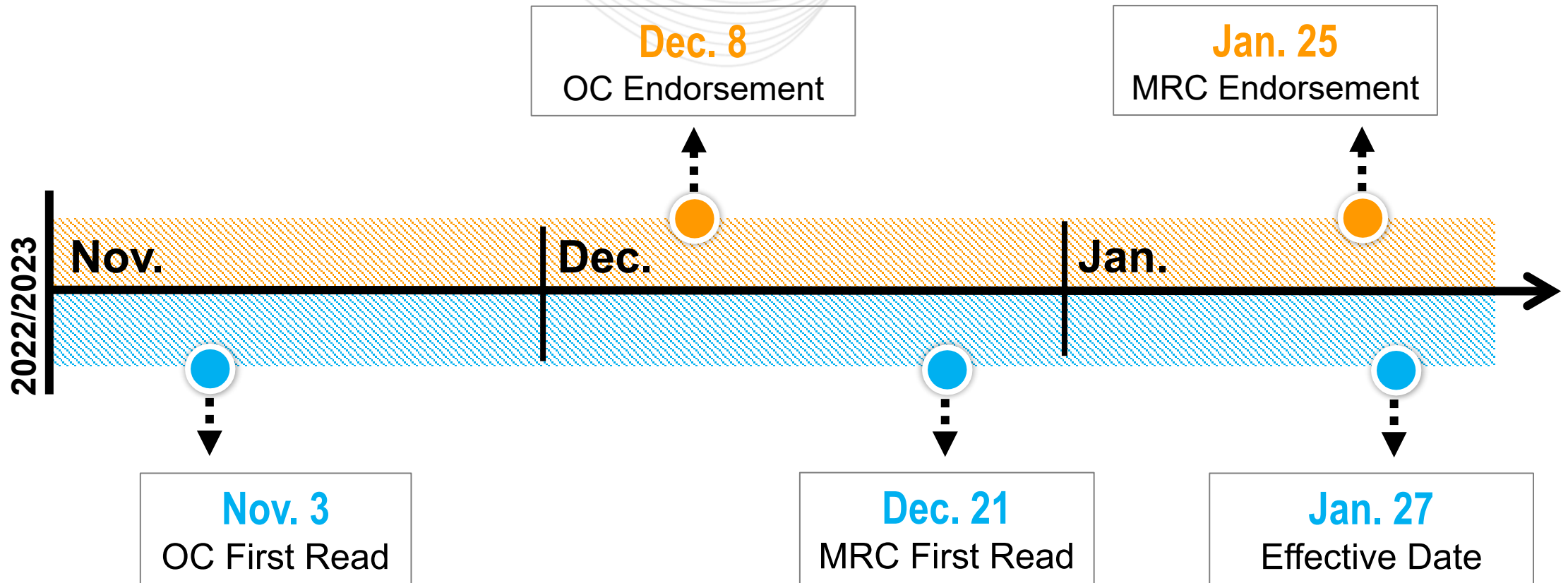
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Transmission Service Department
Markets & Reliability Committee
January 25, 2023

- Internal NITS Process
 - Clarifying changes to border-service processes
- General administrative cleanup

- Section 1: Transmission Service Request Process
 - Minor wording additions / changes to clarify processes are applicable to “cross-border” transmission service
- Section 1.1.2: Network Transmission Service
 - Corrected terminology
 - Struck phrase “located in the PJM RTO”
 - PJM Network Load can be located outside of RTO

- Section 1.2: Applying for Authorization
 - Rewrote section to avoid ambiguity and align with current cross-border processes
- Section 1.3: Point-to-Point Transmission Service Requests
 - Administrative updates
- Various administrative updates to Sections 1.4 (Network Service Requests) and 1.5 (Evaluation of Transmission Service Requests)

Manual 02, Rev 16 Review / Approval Timeline



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Manual 02 – Transmission Service Request



Member Hotline

(610) 666 – 8980

(866) 400 – 8980

custsvc@pjm.com

**PROTECT THE
POWER GRID
THINK BEFORE
YOU CLICK!**



Be alert to
malicious
phishing emails.

Report suspicious email activity to PJM.
(610) 666-2244 / it_ops_ctr_shift@pjm.com



Appendix

Section 1: Transmission Service Request Process

In this section you will find the following information:

- A description of the services offered (see “*Transmission Services Offered*”).
- A description of the process to become eligible for services (see “*Applying for Authorization*”).
- How to request transmission service across the PJM border (see “Point-to-Point Transmission Service Requests” and “Network Service Requests”).
- How transmission service requests are evaluated (see “*Evaluation of Transmission Service Requests*”).

1.1 Transmission Services Offered

(Reference NERC standard MOD-001-1a)

The transmission services available to eligible customers are listed in PJM Open Access Transmission Tariff (OATT). Customers make requests to PJM on the PJM OASIS for the desired cross-border transmission ~~services~~ service products. PJM evaluates each Transmission Service Request to determine the impact to the system, and accepts or refuses the request for the transmission service. Questions or requests for information regarding transmission service must be made to PJM Member Relations at 610-666-8980 or custsvc@pjm.com.

The exhibit below lists the transmission ~~services~~ service products available for PJM RTO.

1.1.1 Point-To-Point Transmission Service

Point-to-Point Transmission Service is the use of transmission facilities for the transmission of capacity and energy between a Point of Receipt (POR) and a Point of Delivery (POD). In the PJM Open Access Transmission Tariff, Firm and Non-Firm Point-to-Point transmission service are offered for terms of various durations. Point-to-Point transmission service can be used for the transmission of capacity and/or energy into, out of, **or** through ~~or within~~ the PJM RTO.

1.1.2 Network Transmission Service

PJM Network **Integration** Transmission Service (~~PJM Network Integration~~ Transmission Service) allows network customers to utilize their network resources to serve their network load ~~located in the PJM RTO~~. The customer purchasing Network Transmission Service must also obtain or provide Ancillary Services.

1.2 Applying for Authorization

PJM's process for authorizing Transmission Customer access to Transmission Service products consists of the steps outlined in this section. Questions concerning the application/authorization process should be directed to PJM Member Relations at 610-666-8980 or custsvc@pjm.com.

1. Applicants initiate the process by contacting PJM Member Relations at custsvc@pjm.com to request the desired Transmission Service products.
2. PJM verifies the applicant is in good standing with respect to PJM's Credit Policy, as outlined in Attachment Q of the PJM Tariff.
3. Prior to preparing a Transmission Service Agreement (TSA), PJM may direct the applicant to submit, via the PJM OASIS, a completed application for Transmission Service as described in sections 17.2 and 18.2 of the PJM Tariff. PJM will notify the applicant if the application is found to be deficient.
4. PJM prepares and provides a TSA to the applicant.
5. The applicant reviews and signs the TSA before returning it to PJM for execution.
6. Upon execution of a TSA, PJM enables customer access to the desired Transmission Service products via the PJM OASIS. PJM files executed TSAs with the FERC, as necessary.
7. Customers may then submit further applications for service via the PJM OASIS.

To become an eligible transmission service customer, a Transmission Service Agreement (TSA) must be prepared by PJM, signed by the applicant, and approved by the FERC. In addition, a credit worthiness check must be completed. The eligibility process consists of the following steps:

Step One—The Transmission Service Application Form, consisting of a cover letter, various Forms of Agreement for Transmission Service, a Transmission Service Agreement, and a credit worthiness form is available on the PJM home page. Questions concerning the application/

~~authorization process should be directed to PJM Member Relations at 610-666-8980 or eustsve@pjm.com.~~

~~Step Two—Complete the application form and return it to PJM Member Relations at eustsve@pjm.com.~~

~~Step Three—If an application is approved, PJM files the original blanket agreement with FERC, either Attachment A (Firm Point To Point), Attachment B (Non Firm Point To Point), Attachment F (Network Integration Transmission Service), or Attachment F1 (Network Integration Transmission Service under State Requirement Retail Access Programs), depending on the service desired. PJM enables access to PJM's OASIS and notifies the customer.~~

~~Step Four—If the application is not approved by PJM, the applicant is notified.~~

1.3 Point-to-Point Transmission Service Requests

All Point-to-Point Transmission Service requests must be made on the PJM OASIS. Information including path-name, Point of Delivery, Point of Receipt, source, sink, time interval, capacity **and/or energy profile and type**, ~~capacity type~~, start date/time and stop date/time must be identified with each request. More details on procedures for making a transmission service request via the PJM OASIS are contained in the PJM OASIS Users Guide at (<https://pjm.com/-/media/etools/oasis/oasis-user-guide.ashx>). In addition, a written application must be submitted to PJM for long-term firm requests.

1.3.1 OASIS Requests for Transmission Service

Eligible transmission customers use the PJM OASIS to request **cross-border** transmission service. Eligible customers must complete the appropriate Transmission Service Agreement (see “Applying for Authorization”) before transmission service ~~requests~~ can be ~~made~~**obtained**. The transmission customer must also register on OASIS in order to make requests for **cross-border** transmission service. The OASIS registration process and user instructions for the OASIS are included on the PJM OASIS Internet web page (<http://oasis.pjm.com>). The process flow for the OASIS transmission service request is depicted on Exhibit 2. This is a simplified process flow which does not include all possible request statuses. Based on analysis, PJM may counter offer an amount less than the requested transmission service pursuant to Section 19.7 of the OATT.

1.3.2 Requests for Long-Term Firm Service

In addition to the online OASIS submission, requests for service 1 year or longer must contain an ~~written~~ application. As per the PJM OATT, requests can be made so long as the Eligible Customer has met the applicable requirements by the commencement of service. Below are the steps to obtain long-term firm transmission service:

1.4 Network Service Requests

Refer to PJM Regional Practices, section 1.5 - ~~PJM NETWORK~~ Network Transmission Service Requests at <http://oasis.pjm.com> for information.

Refer to PJM Regional Practices, section 1.6 - Table Summary: Transmission Service Submittals at <http://oasis.pjm.com> for information on how PJM acknowledges the request for Network Transmission Service.

1.4.1 Non-Designated Resource Delivery to Designated Loads

Non-Designated Resource Delivery to Designated Loads is defined as ~~Network~~ network ~~Transmission~~ transmission use by PJM Load Serving Entities to serve customer load from Non-Designated Resources located outside the PJM RTO. Each ~~use of network~~ Transmission ~~transmission~~ Network use delivering Non-Designated Resources to serve PJM Designated Load must be requested on the PJM OASIS. Refer to PJM Regional Practices, section 1.5 - ~~PJM NETWORK~~ Network Transmission Service Requests at <http://oasis.pjm.com> for information.

1.5 Evaluation of Transmission Service Requests

Once a **cross-border** Transmission Service Request is received (as indicated by **"status = STUDY" status** on OASIS[®]) the evaluation process begins. Each request for transmission service is evaluated by PJM to determine if there is sufficient capability to accept the request and ensure reliable service to all transmission customers.

Available Transfer Capability (ATC) is the capability remaining in the network above that which is already committed. The ATC process is administered by the Transmission Service Department. The ATC calculations are described in Section 2 of this manual.

All **cross-border** Transmission Service Requests are evaluated by PJM based on posted ATC and other reliability analysis. If there is available transmission capability and there are no known reliability problems, the transmission service request is accepted. Once PJM has accepted the request, the ATC posting is adjusted to reflect the new transmission service reservation. All requests for **Long Term cross-border** Network or Point to Point Transmission Service which extend beyond the ATC calculation horizon are subject to the Firm Transmission Feasibility Study process detailed in Section 3 of this manual.