



Markets Gateway - New Process to Submit Exception Request for Offer Verification

As of October 16, 2023

Action Required	Deadline	Who May Be Affected
Functionality Enabled in Production	12/01/2023	Participants that submit Offers to Markets Gateway
Functionality Enabled in Train	10/04/2023	Participants that submit Offers to Markets Gateway
Education on Energy Offer Verification Process	12/06/2023	Notify relevant employees, All Stakeholders
Register for education session	12/06/2023	Participants that submit Offers to Markets Gateway
Review training materials	N/A	Participants that submit Offers to Markets Gateway, All Stakeholders

- Offers > \$1,000 are capped at \$1,000 in Markets Gateway
 - Stakeholders have the opportunity to submit an Exception Request
 - Supporting documentation required for PJM to review request
- New feature requires participants to submit supporting documentation for Exception Requests directly in **Markets Gateway > Schedules > Fuel Price Exceptions** page
 - Approved Fuel Cost Policy
 - Documentation of actual or estimated fuel price (i.e. receipt/screenshot of quote)
 - Cost Development Calculation example
- Sharepoint submission will no longer be supported

- Submit Offers to the **Offer Updates** screen in Markets Gateway
- Offers submitted over \$1,000 are subject to Markets Gateway automated screen validation
 - Offers that fail validation will be capped at \$1,000 or highest approved segment
- Stakeholders have the opportunity to submit an Exception Request for offers that fail validation via the **Fuel Price Exceptions** screen
 - Supporting documentation now submitted directly on this screen
- Exception Requests that are submitted via the updated **Fuel Price Exceptions** screen are only valid for offers > \$1,000 & fail validation

- Go-live date: December 1, 2023
 - Available in Markets Gateway TRN: October 4, 2023
- New screen in Markets Gateway enhances the current process by:
 - Simplifying Exception Request submission for Stakeholders
 - Simplifying Exception Request processing for PJM
 - Removing the need for SharePoint and additional user accounts
 - XML submissions supported
- Markets Gateway User Guide & External Interface Specification Guide will be updated to reflect this new enhancement
- Manual 11 Language changes/endorsement in progress

- Bilaterals
- Demand
 - ▶ Demand Response
 - ▼ Generator
 - Unit
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 - Dispatch Lambda
 - Market Results
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 - Synchronized Reserve Market
 - Non-Synchronized Reserve
 - Secondary Reserve Market
 - Unit Limitations
- Interface Pricing
- Opportunity Cost Calculator
- Parameter Limits
- Price Responsive Demand
- Pseudo Tie Transaction
- ▶ Public
 - System Utilities
 - Up-To-Transaction
 - Virtual
 - Weather Forecast

Portfolio: Location: Schedule:

Refresh Save

- Offers
- Offer Updates
- Detail
- Detail Updates
- Manager
- Selection
- Availability Update
- Restriction Information
- TPS Schedule Switch
- Fuel Price Exceptions
- Composite Offer Verification

PJMSTST >> 2023-09-09 >> TEST UNIT 01 CT (UnitID) >> 99 (99) Last Updated Date/Time: 2023-09-03 11:44:11

<input type="checkbox"/>	Hour	MW	Price	Capped Price	Exception Exists
▼ <input type="checkbox"/>	1			1000	No
		1.0	35.00		
		25.0	58.00		
		50.0	116.00		
		100.0	1,100.00		
▼ <input type="checkbox"/>	2				
▼ <input type="checkbox"/>	3				
▼ <input type="checkbox"/>	4				
▼ <input type="checkbox"/>	5				
▼ <input type="checkbox"/>	6				
▼ <input type="checkbox"/>	7				
▼ <input type="checkbox"/>	8				
▼ <input type="checkbox"/>	9				
▼ <input type="checkbox"/>	10				

Offers that are greater than \$1,000 and fail validation will be capped at \$1,000. The "Exception Exists" column will indicate "No" for these offers until an exception is successfully submitted on the **Fuel Price Exceptions** screen.

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Portfolio **PORTFOLIO 01** Location **TEST UNIT 01 CT** Schedule **99 (99)**

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PJMTST >> 2023-09-09 >> TEST UNIT 01 CT (UnitID)

STEP 1: Create Fuel Price Exception

Location	Schedule	Start Hour	End Hour	Source of Fuel Price	Fuel Hub Name	Fuel Price	Fuel Cost Policy Number
TEST UNIT 01 CT	99(99)	1	1	Third Party	FuelHub1	150	999999

Note: Right-click in this whitespace and select "Add Item" to be able to insert Exception Request data

**All three steps are required for submission

STEP 2: Upload Supporting Document

New step to allow for uploading supporting documentation directly in Markets Gateway

NOTE: Supporting files may be shared for multiple locations and schedules. File operations are auto-saved.

Upload Download Modify Delete

File Name	File Description	Start Day	End Day
Fuel Cost Policy 01.docx	Fuel Cost Policy	2023-09-09	2023-09-10
Fuel Price Quote.JPG	Screenshot of Quoted Fuel Price	2023-09-09	2023-09-10
Numerical Example.xlsxm	Numerical Example Template	2023-09-09	2023-09-10

Note: Select "Upload" button to upload supporting documentation files to Step 2, then add a description and select the Start/End Days

STEP 3: Assign File to Location / Schedule

New step to allow for assigning the uploaded supporting documentation to the appropriate Location and Schedule

File Name	Location and Schedule	Start Hour	End Hour
Fuel Cost Policy 01.docx / Fuel Cost Policy	TEST UNIT 01 CT / 99	1	1
Fuel Price Quote.JPG / Screenshot of Quoted Fuel Price	TEST UNIT 01 CT / 99	1	1
Numerical Example.xlsxm / Numerical Example Template	TEST UNIT 01 CT / 99	1	1

Note: Right-click in this whitespace and select "Add Item" to be able to select a File Name & Location / Schedule from the respective dropdowns

- All fields are required including the file name, description, and start/end dates
 - Files can be applicable for and span multiple days
- A user cannot submit duplicate file names for a unit. Please add specifics to file name such as a date to make every file name unique
 - Example: *quote.jpg* cannot be submitted twice including for different days
- All files uploaded are subject to virus scanning by PJM
- Individual file uploads cannot exceed 500MB
- Avoid uploading zip files

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Portfolio Location Schedule

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"Exception Exists" column will be populated with "Yes" when request is submitted on Fuel Price Exceptions screen

- **All 3 steps on Exceptions screen are required for a successful submission**
- PJM will review Fuel Cost Policy in addition to supporting documentation submitted to Markets Gateway via STEP 2 of Fuel Price Exceptions screen to determine if exception should be granted
 - Verify Exception submitted successfully via “Exception Exists” column on Offer Updates page changing from “No” to “Yes”
- If Exception Request is approved, the Max Allowable Offer Price (MAOP) will be updated and any segments at or below MAOP will be considered passed
- No additional action will be required if Exception Request is approved
- Stakeholders will be notified via the “Capped Price” column in the Offer Updates screen of Markets Gateway

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Portfolio PORTFOLIO 01 Location TEST UNIT 01 CT Schedule 99 (99)

Refresh XML
Save CSV

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If Exception Request is approved, MAOP will be updated to the new calculated price, and no additional action is required

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Markets Gateway – Offer Verification



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