Effective Date | February 1, 2018
---|---
**Impacted Manual #(#s)/Manual Title(s):**
- Manual 40
  - Training and Certification Requirements

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**Associated Issue Tracking Title:**

**Committee Approval Path - What committee(s) have already seen these changes?**

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<th>Committee</th>
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<td>MRC</td>
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| MRC 1st read date: | 12/21/17 |
| MRC voting date: | 1/25/18 |

**Impacted Manual sections:**

- Section 1: Training Overview
  - 1.4.4: Task List Maintenance
  - 1.4.5: Task Modification
  - 1.5.4: Task Verification
  - 1.7: Evaluation of Program Activities
- Section 2: Certification Overview
  - 2.1: Purpose
  - 2.2: Administration of the Certification Program
  - 2.3: Certification Requirements
- Section 3: Member Training and Certification Requirements
  - 3.2.1: Transmission Owner Operators
  - 3.2.2: Market Operation Center Generation Dispatchers
  - 3.2.4: Small Generation Plant Dispatcher
  - 3.2.5: Demand Response Resources
  - 3.3: Compliance Monitoring Process for Training and Certification Requirements
- Section 4: PJM Operator Training
  - 4.3: Instructor Qualifications
### Executive Summary

#### Manual Changes

| 4.4: | Master Coordinator Initial Training and Qualification Requirements |
| 4.5: | Generation Dispatcher Initial Training and Qualification Requirements |
| 4.6: | Power Director Initial Training and Qualification Requirements |
| 4.9: | PJM System Operator Continuing Training Program |

#### Reason for change:

Annual Review per NERC Standard PER-005.

#### Summary of the changes:

- 1.4.4, 1.4.5 and 1.5.4: Applied clarifying language to indicate PJM will coordinate Task list review/approvals/Opt outs with the DTS and Operations as needed
- 1.7: Changed to indicate DTS plays a key role in the program evaluation but PJM is responsible for identifying action items and timelines
- Section 2: reorganized flow to accommodate new Markets exam
- 2.1 and 2.2: cover what is common to all exams
- 2.2.5: Added Disciplinary Actions section
- 2.3: Only deals with required credentials; removed time elements which are covered in section 3
- 3.2.1: EOP schedule prorated to accommodate individuals that leave position; added language to clarify PJM and DTS roles in annual task training
- 3.2.2: added language to indicate change to annual requirement for continuing training starting in 2019 MOC Generation Dispatchers
- 3.2.4: added language to indicate change to annual requirement for continuing training starting in 2019 for Small Generation Plant Dispatchers
- 3.2.5: added language to include additional audience in required initial and continuing training
- 3.3: updated timing requirements to annual for MOC Generation dispatchers and Small Generation Plant Dispatchers
- Section 4: Consistency in formatting throughout section
- 4.3.1: Removed “beginning in 2012”
- 4.4: Changed requirement for PJM Generation Certification timeline from 1 year
Executive Summary
Manual Changes

- to 6 months to match the PJM member requirement.
  - 4.4: Removed ExSchedules from list of Master Coordinator related tools
  - 4.5: Added clarifying language to Simulator Retest process
  - 4.6: Added clarifying language to Simulator Retest process. Replaced the word “Understand” in Skills and Knowledge section with “Ability to demonstrate knowledge of”.
  - 4.9: Replaced the word “quiz” with “assessment”.

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