Manual 40, Training and Certification Requirements

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System Operator Training
System Operation Subcommittee
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• 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 & 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
Summary of Changes

• 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
Summary of Changes

- 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
Next Steps

- 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