<table>
<thead>
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<th>Executive Summary</th>
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<td>Manual Changes</td>
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**Effective Date**: February 1, 2018

**Impacted Manual #(#s)/Manual Title(#s):**
- Manual 40
  - Training and Certification Requirements

**Conforming Order(#s):**

**Associated Issue Tracking Title:**

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

<table>
<thead>
<tr>
<th>Committee</th>
<th>First Read(s)</th>
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<tr>
<td>DTS</td>
<td>11/21/17</td>
<td>12/19/17</td>
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<tr>
<td>SOS</td>
<td>12/7/17 (first read); 1/4/18 (endorsement)</td>
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<td>DRS</td>
<td>12/8/17 (first read); 1/12/18 (endorsement)</td>
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<td>OC</td>
<td>12/12/17 (first read); 1/9/18 (endorsement)</td>
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<tr>
<td>MRC</td>
<td>12/21/17 (first read); 1/25/18 (endorsement)</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: Analysis
  - 1.5: Development of Training Programs
  - 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: Entity Training and Certification Requirements
  - 3.3: Compliance Monitoring Process for Training and Certification Requirements
- **Section 4: PJM Operator Training**
  - 4.3: Instructor Qualifications
  - 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
Executive Summary
Manual Changes

Reason for change:
Annual Review per NERC Standard PER-005.

Summary of the changes:

- Section 1: Clarified the role of the Dispatcher Training Subcommittee (DTS) in the Task List Review and Program Evaluation
- Section 2: Reorganized section to accommodate the Markets certification exam
- 2.2.5: Added section on disciplinary actions for certification exam
- 2.3: Removed reference to timeframes associated with certification requirement. Added reference to Section 3 where these are covered in detail.
- 3.2.1: Added clarifying language to EOP requirement
- 3.2: Added clarifying language to the role of the DTS in determining the scope of the continuing training program
- 3.2: Changed MOC and Small Plant Generation Dispatcher continuing training requirement from rolling 3-year requirement to annual requirement
- 3.2.5: Added language to include Load Management resources
- 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 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”.