



NEMSTF CHARTER RESPONSIBILITIES

DRAFT Table of Completion/Compliance

May 25, 2012

RESPONSIBILITIES

No.	Grouping	Task(s), Original Responsibility number	Action or Finding	Responsive NEMSTF Deliverables
1	Jurisdiction	1- Spell out the current and pending FERC and state legislation and regulation for a net energy metering (NEM) project injecting excess generation to a PJM administered wholesale market, documenting possible conflicts within PJM tariffs, manuals and business rules.	Completed Documented NEM Provisions by State Reviewed and documented jurisdiction for physical interconnection and energy sales	<ol style="list-style-type: none"> 1. NEMSTF Flowchart/Decision Tree http://www.pjm.com/~media/committees-groups/task-forces/nemstf/20120430/20120430-jurisdictional-decision-tree.ashx 2. NEMSTF Glossary http://www.pjm.com/committees-and-groups/task-forces/~media/committees-groups/task-forces/nemstf/postings/nem-glossary.ashx 3. Table of NEM Provisions by State http://www.pjm.com/committees-and-groups/task-forces/nemstf/postings/nem-provisions-by-state.ashx
2	Jurisdiction	10 - NEMSTF may consider current laws, as well as current or pending NEM regulations and commission orders occurring throughout the PJM region in development of NEMSTF recommendations.	Completed	<ol style="list-style-type: none"> 1. NEMSTF Flowchart/Decision Tree http://www.pjm.com/~media/committees-groups/task-forces/nemstf/20120430/20120430-jurisdictional-decision-tree.ashx 2. NEMSTF Glossary http://www.pjm.com/committees-and-groups/task-forces/~media/committees-groups/task-forces/nemstf/postings/nem-glossary.ashx 3. Table of NEM Provisions by State http://www.pjm.com/committees-and-groups/task-forces/nemstf/postings/nem-provisions-by-state.ashx



3	Jurisdiction	3- Clarify the distinction, if any, between injecting excess into the grid that results in sales to a PJM administered wholesale market versus injecting excess to the EDC distribution grid that results in “sales” to the host utility. If different, determine the applicable rules for handling each scenario.	Distinction documented	<ol style="list-style-type: none"> 1. NEMSTF Flowchart/Decision Tree http://www.pjm.com/~media/committees-groups/task-forces/nemstf/20120430/20120430-jurisdictional-decision-tree.ashx 2. NEMSTF Glossary http://www.pjm.com/committees-and-groups/task-forces/~media/committees-groups/task-forces/nemstf/postings/nem-glossary.ashx
4	Jurisdiction	2A - Identify the Qualifying Facility (QF) status of certain NEMs	Completed. QF status is determined by the FERC.	<ol style="list-style-type: none"> 1. NEMSTF Flowchart/Decision Tree http://www.pjm.com/~media/committees-groups/task-forces/nemstf/20120430/20120430-jurisdictional-decision-tree.ashx 2. NEMSTF Glossary http://www.pjm.com/committees-and-groups/task-forces/~media/committees-groups/task-forces/nemstf/postings/nem-glossary.ashx 3. Table of NEM Provisions by State http://www.pjm.com/committees-and-groups/task-forces/nemstf.aspx
5	Jurisdiction	2B - document how that status impacts or affects their ability to sell into PJM administered wholesale markets.	Completed. The ability to sell into the PJM-administered wholesale markets is predicated	<ol style="list-style-type: none"> 1. NEMSTF Flowchart/Decision Tree http://www.pjm.com/~media/committees-groups/task-forces/nemstf/20120430/20120430-jurisdictional-decision-tree.ashx 2. NEMSTF Glossary http://www.pjm.com/committees-and-groups/task-forces/~media/committees-groups/task-forces/nemstf/postings/nem-glossary.ashx



			upon a party's agreement to uphold its obligations under PJM membership/ market participant documents (e.g. PJM OA, PJM OATT, etc.).	-and-groups/task-forces/~media/committees-groups/task-forces/nemstf/postings/nem-glossary.ashx
6	Interconnection	7-Review the interconnection processes for small generators and, if necessary, recommend potential improvements. Coordinate with the Interconnection Process Senior Task Force ("IPSTF") to ensure duplicate efforts are avoided.	Review Completed. No Actions necessary as PJM Interconnection Processes currently accommodate NEM and Renewable generation interconnection	<ol style="list-style-type: none"> 1. See PJM Interconnection Attachments - Specifically BB, and Y 2. See meeting artifact - summary process for interconnection and WMPA
7	Settlements	4 - Consider development of rules for net energy metering facilities to the extent they participate in PJM administered wholesale markets.	Completed. Actions taken. Tier 1 Consensus for minor manual amendments to accommodate use of PJM's existing eTools and existing meter and settlement reconciliation processes	See Matrix of Design Components and Solution Options. Specifically - #4,5,& 6
8	Settlements	6 - Consider the need for and propose methodologies, as necessary, through which such excess generation sales	Completed Actions taken. Tier 1 Consensus for minor manual amendments to accommodate use of PJM's	See Matrix of Design Components and Solution Options. Specifically - #4,5,& 6



		into the wholesale market can be accommodated within PJM eMTR and settlement systems, and the PJM system operations zonal bus models that support them.	existing eTools and existing meter and settlement reconciliation processes	
9		10 - Review and provide recommendations of how a PJM market participant's net metered wholesale energy injections integrate into the energy accounting and financial settlement, if any.	Completed. Actions taken. Tier 1 Consensus for minor manual amendments to accommodate use of PJM's existing eTools and existing meter and settlement reconciliation processes	See Matrix of Design Components and Solution Options. Specifically - #4,5,& 6
10	Aggregation, Virtual and Community Energy	8 - Better understand and consider the impacts of the concept of Virtual Net Metering (VNM) that has been raised in some state jurisdictions and how, if at all, VNMs might be accommodated within PJM tariffs, manuals, business rules, and settlement systems.	Review and discussions held. Review and clarification of varying definitions conducted. No specific FERC definitions or guidance regarding jurisdiction. Addressed locally by EDCs - No Change to PJM tariffs,	See - Table of NEM Provisions by State (XLS) http://www.pjm.com/committees-and-groups/task-forces/nemstf.aspx

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			manuals, business rules, and settlement systems.	
11	Aggregation, Virtual and Community Energy	9 - Better understand and consider the impacts of the concept of Community Energy Facility (CEF) that has been raised in some state jurisdictions, and whether and how, PJM tariffs, manuals, business rules, and/or settlement systems may be revised to accommodate CEFs.	<p>Review and discussions held. Review and clarification of varying definitions conducted.</p> <p>No specific FERC definitions or guidance regarding jurisdiction.</p> <p>Addressed locally by EDCs - No Change to PJM tariffs, manuals, business rules, and settlement systems.</p>	<p>See - Table of NEM Provisions by State (XLS)</p> <p>http://www.pjm.com/committees-and-groups/task-forces/nemstf.aspx</p>
12		11- Identify and review retail tariffed relationships between net metered customers, Load Serving Entities (LSEs), Curtailment Service Providers (CSPs), EDCs and PJM to ensure MWhs consumed or generated by the net meter customer are properly	<p>Review and discussions held. Review and clarification of varying definitions conducted.</p> <p>Actions taken. Tier 1 Consensus for minor manual amendments to accommodate use of PJM's existing eTools and existing meter and settlement</p>	<p>See Matrix of Design Components and Solution Options. Specifically - #4,5,& 6</p>

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		accounted for by each type of market participant serving the retail customers via PJM administered wholesale markets	reconciliation processes. NEMSTF design principle provides for permissive adoption by individual stakeholders (please see NEMSTF Final Report).	
13	Implementation	5 - Integrate MRC and Members Committee (MC) approved requirements into any proposed PJM settlement system or bus model changes, including business applications and data interfaces.	Actions to be taken <u>after</u> MRC direction	

DELIVERABLES

The NEMSTF shall produce deliverables consistent with Responsibilities Nos. 1-13, inclusive. Such deliverables shall be of “first read” quality and available to the sponsoring MRC Committee as of June 1, 2012. Additionally, the NEMSTF shall document and deliver any issues, considerations or associated impacts that are deemed out of scope or captured but unresolved via facilitated meeting “parking lots.”