



Interconnection Process Reform Manual Language Update

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Markets & Reliability Committee
July 26, 2023

- Manual updates to incorporate the FERC approved Interconnection Process Reform Tariff changes filed in Docket ER22-2110-000 and conditionally approved on November 29, 2022.
- Seeking endorsement from the Markets and Reliability Committee:
 - Regional Transmission and Energy Scheduling Practices
 - New Manual:14H
 - Existing Manuals: 2, 6, 14A, 14B, 14C, 14E,14G, 18, 20, 21, 21A, 27 and 28

Manual	Section	Title
All	All	Minor administrative edits to accurately reflect new process terminology.
14H	Section 2	Added new sub-section “Withdrawal prior to Phase I” that explains how New Service Requests may be withdrawn prior to the start of Phase I.
14H	Sections 4 & 6	Clarified that Readiness Deposit No.1 is not at risk until the close of Decision Point I for New Service Requests in Transition Cycle #1.
14H	Attachment B	Clarified that if multiple projects are connecting to the same interconnection substation and there is no room for expansion at the substation, the Transmission Owner will provide cost estimate for an electrically equivalent viable alternative, in accordance with Transmission Owner’s Applicable Technical Requirements and Standards.
14H	Attachment I	Added new sub-section “Expedited Process Final Agreement Negotiation” to explain the Final Agreement Negotiation process for projects in the expedited process (“fast lane”).

Review Timeline

2023: April → May → June → July

APRIL 24
 IPS
Post Draft Manuals and Solicit Feedback

MAY 10
 IPS ☆
Deadline for Feedback to be considered at May 18 Session

JUNE 6.
 PC
First Read

JULY 11
 PC
Endorsement

LEGEND
 IPS – Interconnection Process Sub-Committee
 PC – Planning Committee
 MIC – Market Implementation Committee
 MRC – Markets & Reliability Committee
 OC – Operating Committee

Indicates
 ☆ milestone/deadline

MAY 18
 IPS
IPS Special Session for Manual Feedback

JUNE 7.
 MIC
First Read

JULY 12
 MIC
Endorsement

MAY 25
 IPS
IPS Meeting

JUNE 8.
 OC
First Read

JULY 13
 OC
Endorsement

JUNE 22.
 MRC
First Read

JULY 26
 MRC
Endorsement
Target Effective Date ☆

- Please email questions or feedback to IPRTF_ManualReviewTeam@pjm.com.

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Appendix

New - Manual 14H New Service Requests Cycle Process

- Captures transition period rules, new process rules, and interconnection related agreements.
- Consolidates applicable content from existing:
 - M14A - New Services Request Process
 - M14E - Upgrade and Transmission Interconnection Requests
 - M14G - Generation Interconnection Requests

Existing - M14A, E, G

- Updates to clarify applicability.
- Manuals will apply to projects that are tendered final agreements prior to the transition to the new rules.

Existing - Other Manuals / Documents

- Updates to incorporate new process rules and terminology (Details in Appendix)
 - M2 – Transmission Service Requests
 - M6 – Financial Transmission Rights
 - M14B – PJM Regional Transmission Planning Process
 - M14C – Generation & Transmission Interconnection Facility Construction
 - M18 – PJM Capacity Market
 - M20 – Resource Adequacy Analysis
 - M21A – Determination of Accredited UCAP Using Effective Load Carrying Capability Analysis
 - M27 – Open Access Transmission Tariff Accounting
 - M28 – Operating Agreement Accounting
 - Regional Transmission and Energy Scheduling Practices



Planned Review Timeline

Manual	SC	IPS	PC/OC/MIC 1st Read	MRC First Read	PC/OC/MIC Endorsement	MRC Endorsement
M14A - New Services Request Process	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023
M14B – PJM Regional Transmission Planning Process	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023
M14C – Generation & Transmission Interconnection Facility Construction	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023
M14E - Upgrade and Transmission Interconnection Requests	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023
M14G - Generation Interconnection Requests	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023
M14H - New Service Request Process	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023



Planned Review Timeline

Manual Name	SC	IPS	PC/OC/MIC 1st Read	MRC First Read	PC/OC/MIC Endorsement	MRC Endorsement
M2 – Transmission Service Requests	OC	4/24/2023	6/8/2023	6/22/2023	7/13/2023	7/26/2023
M6 – Financial Transmission Rights	MIC	4/24/2023	6/7/2023	6/22/2023	7/12/2023	7/26/2023
M18 – PJM Capacity Market	MIC	4/24/2023	6/7/2023	6/22/2023	7/12/2023	7/26/2023
M20 – Resource Adequacy Analysis	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023
M21 – Load Forecasting & Analysis	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023
M21A – Determination of Accredited UCAP Using Effective Load Carrying Capability Analysis	PC	4/24/2023	6/6/2023	6/22/2023	7/11/2023	7/26/2023
M27 – Open Access Transmission Tariff Accounting	MIC	4/24/2023	6/7/2023	6/22/2023	7/12/2023	7/26/2023
M28 – Operating Agreement Accounting	MIC	4/24/2023	6/7/2023	6/22/2023	7/12/2023	7/26/2023
Regional Transmission & Energy Scheduling Practices	OC	4/24/2023	6/8/2023	6/22/2023	7/13/2023	7/26/2023

Section #	Title
	Introduction
1	New Service Request Study Process Overview and Determining Customer Type
2	Application Phase
3	PJM Support for New Service Customers
4	Phases and Decision Points
5	Final Agreement and Negotiation Phase
6	Study and Readiness Deposits
7	Site Control Requirements

Section #	Title
8	Summary of Agreements
9	Generator Interconnection Requirements, Rights and Obligations
10	Transmission Interconnection Requests - Rights and Obligations
11	Upgrade Request
12	Surplus Interconnection Service
13	Affected System Studies
14	Converting a Two-party Agreement to GIA

Attachment	Title
A	Interconnection Process Flow Diagram
B	Cost Allocation Procedures
C	Facilities Study Procedure
D	HVDC Additional Study Requirements
E	Transmission Injection Rights and Transmission Withdrawal Rights
F	Incremental Auction Revenue Rights
G	Incremental Deliverability Rights
H	Incremental Capacity Transfer Rights and Qualified Upgrades
I	Transition Procedures
J	Site Plan Requirements

M2 – Transmission Service Requests

- References: Administrative change to correct outdated manual names and add Manual 14H.
- Using this Manual: Added 'note' explaining queue reform Transition Date.
- Section 1.3.2: Updated terminology, OATT & Manual references and process steps
- Section 1.5: Updated terminology and made changes for clarity.
- Section 3 (introduction): Updated terminology and details of the deliverability study process for Long Term Firm requests. Updated Exhibit 4.
- Section 3.1: Administrative change to correct grammar. Updated terminology.
- Section 3.3: Administrative updates to manual references. Clarifying changes to transmission service product applicability.
- Section 3.4: Administrative change to correct grammar.
- Section 3.5: Updated terminology and manual references.
- Section 3.6: Updated terminology, process steps and OATT & manual reference.

M6 – Financial Transmission Rights

- Section 4.9.1: Updated terminology section title, impacted terminology and clarified existing language.

M14A – New Service Request Process

Introduction: Added applicability language

M14B – PJM Regional Transmission Planning Process

- Introduction: Revised terminology to align with new tariff language, updated references
- Section 1A.3.1.1: Updated terminology
- Section 1.1: Updated terminology/references
- Section 1.4.1.6: Updated terminology/references
- Section 1.4.3: Updated terminology
- Section 2.1.1.1: Updated terminology/references
- Section 2.2: Updated terminology, revised note to clarify potential impact of generation retirements
- Section 2.3.1: Updated terminology
- Section 2.4: Updated terminology, streamlined language
- Section 2.5: Updated reference
- Attachment B, B.3 & B.4: Updated terminology/references
- Attachment B, B.4: Updated terminology
- Attachment C: Updated terminology throughout
- Attachment G: Updated terminology/references throughout, updated stability language to align with current process
- Attachment H.1.2: Updated terminology

M14C – Generation & Transmission Interconnection Facility Construction

- Section 1: Updated to expand agreement names
- Section 1.3: Revised terminology, added reference to WMPA location
- Sections 1.6 to 1.10: Added new sections to detail GIA, EPA, CSA, NSA, and NUCRA agreements
- Section 2: Revised terminology throughout
- Section 3: Revised terminology/references throughout
- Section 3.1: Added statement regarding transition from ISA/ICSA to GIA, removed note regarding "on hold" network upgrades
- Section 3.7: Added statement regarding new process suspension rules
- Section 4 & 5 Revised terminology/references throughout
- Attachment C: Added statement clarifying suspension rules following Transition Date

M14E – Upgrade and Transmission Interconnection Requests

Introduction: Added applicability language

M14G – Generation Interconnection Requests

Introduction: Added applicability language

M18 – PJM Capacity Market

- Sections 4.4.3, 4.4.4, 4.2.5, 4.8.2, 4.8.5, 4.10, 5.4.7, 6.1, 6.1.2, 8.8, 11.4.6, Glossary A – IPRTF nomenclature changes

M20 – Resource Adequacy Analysis

- Introduction – General note added to describe impact of Interconnection Process Reform on existing ISAs
- Section 4.3 #13 – Reference to ISA is updated to Generation Interconnection Agreement (GIA)

M21 – Rules and Procedures for Determination of Generating Capability

- Introduction – General note added to describe impact of Interconnection Process Reform on existing ISAs
- Section 1 – Updated ISA references to GIA
- Section 2 – References to Feasibility Study Agreement updated to Phase I System Impact Study .
- Attachment B – Updated ISA references to GIA

M21A – Determination of Accredited UCAP Using Effective Load Carrying Capability Analysis

- Section 4.1, 4.2 & 4.3 – Updated references ISA to GIA and references to interconnection queue

M27 – Open Access Transmission Tariff Accounting

- Section 1.1 – Clarified planning studies conducted by PJM

M28 – Operating Agreement Accounting

- Sections 5.2.6.1, 5.2.6.2, 5.2.6.4, 5.2.8 – Terminology updates

Regional Transmission and Energy Scheduling Practices

- Definitions – Added Application and Studies Agreement and Phase I System Impact Study
- Definitions – Removed definition for Firm Transmission Feasibility study
- Sections 1.2 and 1.2.3 – Updated to reflect IPRTF process changes