



# OC Special Call-TO Data Feed Issue Final Proposal

Nancy Huang

OC

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3/14/14  
6/26/14

- Problem Statement / Issue Charge presented and approved
- Seeking to change governing documents and manuals to facilitate Transmission Owner access to generator real time data and outage information needed for TO real time analyses

5/27/14

- Group discussion initiated under OC
- CBIR “Lite” process

8/25/14

- Final Report reviewed
- Six total meetings
- Tier 1 consensus on a single proposal

## Objectives:

- Streamline the administration of the approval process
- Maintain the level of protection of data shared between GO and the TO
  - Replace current confidentiality agreement process with confidentiality provisions to be included in Operating Agreement
  - Simplify criteria for providing data to TO
    - Real-time generator data internal to TO zone
      - Justification not required
    - Real-time generator data external to TO zone must confirm that generator:
      - is in current TO EMS model, or,
      - will be in TO EMS model due to expansion of model by TO

## Operating Agreement revisions

The changes in section 18.17 (Confidentiality), which include:

1. New section 18.17.7: *Disclosure of Generator Data to Transmission Owners*  
Includes terms and conditions of a universal non-disclosure agreement
2. Minor changes in section 18.17.6 to prevent conflict with language in new section 18.17.7.

## M14D revisions

- Revised processes for TO data requests within TO zone and outside TO zone
- Deleted decision criteria sections for evaluation of data requests
- Deleted process for executing confidentiality agreements
- Added process flow chart
- Deleted confidentiality agreement attachment
- Updated Generator Data Release Matrix attachment
- Deleted sample letter attachment for TO requesting data within TO zone

- 1<sup>st</sup> read by OC on 9/4/2014
- 1<sup>st</sup> read by MRC on 9/18/2014
- Endorsement by OC on 10/7/2014
- Endorsement by MRC on 10/30/2014
- Endorsement of OA revisions by MC on 11/20/2014
- FERC filing in December 2014
- New process effective around Feb. / Mar. 2015

# Appendix 1



# Proposed Manual M14D Revisions

## M14D revisions

Current Manual M14D Section 11				Revised Manual M14D Section 11			
<b>11 Generator Data Confidentiality Procedures</b>				<b>11 Generator Data Confidentiality Procedures</b>			
11.1	Overview of Procedures		Summary	11.1	Overview of Procedures		Revised summary
11.1.1	Generator Data within a TO's Zone	TO sends letter (Att. K) to GO		11.1.1	Generator Data within a TO's Zone	Revised - TO sends request to PJM, PJM provides data, PJM notifies GO	
11.1.2	Generator Data outside a TO's Zone	TO signs Confidentiality Agreement (Att. I) and sends to each GO		11.1.2	Generator Data outside a TO's Zone	Revised - TO sends request with technical justification to PJM, PJM provides data, PJM notifies GO	
11.1.3	Process for release of Real-Time Gen Data	Decision criteria for release of real-time Gen data		<b>11.1.3 Deleted</b>	<b>Decision criteria no longer required</b>		
11.1.4	Process to release of Generation Outage Data	Decision criteria for release of Generation Outage Data		<b>11.1.4 Deleted</b>	<b>Decision criteria no longer required</b>		
11.1.5	Executing a Data Confidentiality Agreement	Step by step procedure to execute a CA		<b>11.1.5 Deleted</b>	<b>Confidentiality Agreement no longer required</b>		
11.1.6	PJM Evaluation of Data Request	Criteria for reviewing TO's request		<b>11.1.6 Deleted</b>	<b>Criteria for reviewing TO's request not required</b>		
11.1.7	Dispute Resolution	Formal PJM process for resolving disputes		11.1.3	Dispute Resolution	Formal PJM process for resolving disputes	
				11.1.4	Generator Data Process Flow	Flowchart	
Att. I	Generator Confidentiality Agreement	Legal document requiring signature by TO/GO officers		<b>Att. I Deleted</b>	<b>Confidentiality Agreement no longer required</b>		
Att. J	Generator - Data Release Matrix	List of Generating Units in TO's Data Request		Att. J	Generator - Data Release Matrix	List of Generating Units in TO's Data Request (updated)	
Att. K	Template letter for Transmission Owner for release of generator data within TO Zone	Sample of letter requiring signature by TO/GO officers		<b>Att. K Deleted</b>	<b>Letter no longer required</b>		



