



# Manual 40

## Training and Certification Requirements

### Revision 22

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Section Lead, State and Member Training

- Cover to cover periodic review
- Various sections: updated operator/dispatcher terminology to be consistent
- Section 2.3.4: updated language to match language in Section 3.3, Compliance Monitoring Process for Training and Certification Requirements
- Section 3.3: updated to reflect changes made to Section 3.2 in revision 21 for ESR
- Section 3.4: updated temporary waiver language to allow for more flexibility in addressing compliance with training and certification requirements
- Removed Section 4: PJM Operator Training
- Removed Richard Brown as co-owner with removal of Section 4

## 2.3.4 Recertification

There are two ways a PJM Generation or PJM Transmission credential can be renewed:

### 1. Retest

Before the certificate for a PJM certified operator/dispatcher expires, apply for, take and pass the same PJM certification exam for which he/she holds a valid certificate.

### 2. Continuing Education Hours (CE Hours):

On a rolling three year basis, complete at least 140 hours of NERC approved CE training related to the PJM credential which has been recorded in the PJM (LMS). Of the 140 CE hours required to renew, 30 CE hours must be approved for the category of Simulation. If an operator/dispatcher has more than the required 140 CE hours at the time of the request for renewal, PJM will allow up to 30 CE hours to be carried over to the next 3 year period. No hours will be carried over in any of the CE category classifications (e.g., Simulation, Standards, or EOP hours). Those who fail to get credit for 140 CE hours, of which 30 CE hours must be for Simulation, must apply for, take, and pass the appropriate PJM exam before their current certificate expires.

Specific requirements for maintaining a PJM certification are outlined in Section 3 of this manual. Failure to renew a certification prior to the certification date of the credential will be subject to the compliance monitoring process described in Section 3.3. Mitigation plans developed to address such lapses in certification will be reviewed on a case-by-case basis and may include remedial actions such as supplemental training activities or retesting. Please note that an individual with an expired PJM certification **must be removed from his/her shift responsibilities until such time that he/she comes into compliance with those requirements.** **may not independently take direction from PJM.**

## Small Generation **Plant Dispatchers** **Resource Dispatchers**

- **(Operating between 20 MW and 75 MW on an aggregate basis):**
  - o Initial Training Program (ITP) completed
  - o Operator Readiness Exam passed
  - o Continuing Training Program requirements met
    - 8 hours of continuing/refresher training per calendar year
    - Required Just-In-Time Training (by assigned due date)
- **(Operating less than 20 MW on an aggregate basis):**
  - o **Initial Training Program (ITP) completed**
  - o **Continuing Training Program requirements met**
    - **Annual refresher training module assigned via the PJM LMS**
    - **Required Just-In-Time Training (by assigned due date)**

## **Demand Response Resource and Energy Storage Device Operators**

- Initial Training completed
- Continuing Training Program requirements met
  - o Annual refresher training module assigning via the PJM LMS
  - o Required Just-In-Time Training (by assigned due date)

## **Energy Storage Resource Operator**

- **Greater than 75 MW on an aggregate basis:**
  - o Energy Storage Resource Operators are subject to the training requirements of the MOC Generation Dispatcher above
- **Less than 75 MW on an aggregate basis:**
  - o Energy Storage Resource Operators are subject to the training requirements of the Small Generation Resource Dispatcher above



### 3.4 ~~Temporary~~ Waiver of PJM Training and Certification Requirements

Situations ~~lasting three months or longer within a calendar year~~ may arise which can prevent a ~~system~~ operator/dispatcher from fulfilling assigned work duties and satisfying the applicable PJM training and certification requirements.

In such cases, the Training Liaison must, on behalf of the operator/dispatcher, submit a letter requesting a ~~temporary~~ waiver from the PJM training and certification requirements with a supporting statement by the entity's manager ~~of system operations~~, or equivalent. The letter must provide a thorough explanation of the circumstances preventing the operator/dispatcher from satisfying the requirements, and should be emailed to [TrainingSupport@pjm.com](mailto:TrainingSupport@pjm.com).

PJM will review the request and will provide the Training Liaison with a final determination. The terms of the waiver, if granted, will be suited to the specifics of the case.

The Training Liaison is required to advise [TrainingSupport@pjm.com](mailto:TrainingSupport@pjm.com) of the date when the operator/dispatcher resumes normal duties and can participate in training activities.

- Removed PJM Operator Training section from M-40 and relocated to an (internal) Ops Division Procedure
  - Does not impact member requirements
  - Enables increased flexibility

