



OC Special Call-TO Data Feed Issue Final Proposal

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MRC

October 30, 2014

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

- 1st read by OC on 9/4/2014
- 1st read by MRC on 9/18/2014
- Endorsed 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			
11 Generator Data Confidentiality Procedures				11 Generator Data Confidentiality Procedures			
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		11.1.3 Deleted	Decision criteria no longer required		
11.1.4	Process to release of Generation Outage Data	Decision criteria for release of Generation Outage Data		11.1.4 Deleted	Decision criteria no longer required		
11.1.5	Executing a Data Confidentiality Agreement	Step by step procedure to execute a CA		11.1.5 Deleted	Confidentiality Agreement no longer required		
11.1.6	PJM Evaluation of Data Request	Criteria for reviewing TO's request		11.1.6 Deleted	Criteria for reviewing TO's request not required		
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		Att. I Deleted	Confidentiality Agreement no longer required		
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		Att. K Deleted	Letter no longer required		

