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First Read: Problem Statement & Issue Charge

Resource Tracker Ownership Confirmation Requirement

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Operating Committee
March 11, 2021

- Operating Agreement, Section 11.3.1(a), Members are responsible for maintaining complete and accurate records
- Created in 2013 to provide a single point mechanism for Generation Owner information
- In December 2018, stakeholders endorsed changes to move confirmation period to Annually with a four week duration
- In 2019 and 2020, further enhancements were made to field logic and formatting

- 2020 annual confirmation period opened on October 1 and closed on November 1
- There were 1,503 total resources requested to confirm
 - 60 resources did not confirm by November 1 (3.9% of total)
 - As of February 1, only 4 have not confirmed yet
 - 69 resources reported a discrepancy by November 1 (4.6% of total)
 - Physical Owner
 - Change of Dispatch
 - As of today, zero units have a discrepancy

- Tool
 - Refresh User Interface to reflect that of the other tools
 - Add additional fields to provide contacts associated with resource
 - Enhance access through Account Manager

Proposed redline for M14D, Section 5.3.7

Resource Tracker supports the maintenance of ownership information and provides the user the ability to review all sources of ownership information. ~~Market Participants are requested~~ **Generation Owner, or designated agent, is required** to confirm the resource ownership information by November 1 annually. The window to start the process will open October 1 annually.

During a Generation Transfer, Section 5.7 of the Manual, the ~~Transferee (“to”~~ **Member/Company) must** **Generation Owner, or designated agent, is required to** confirm the **resource ownership information** in Resource Tracker within two (2) business days after receiving an automated email from the Resource Tracker System alerting them of the transfer.

- M14D, Section 2.1
 - As defined in the PJM Operating Agreement, a “Generation Owner” shall mean a Member that owns or leases, with right equivalent to ownership, or otherwise controls and operates one or more operating generation resources located in the PJM Region.
 - Note that PJM requires a Generation Owner to have a single point of contact for real-time and near real-time operations. That single point of contact has to communicate and coordinate with the appropriate PJM member corporate entity to fulfill the assigned responsibilities.

Quick Fix: Proposed Schedule

- February OC: First Read
 - March OC: Vote
 - March MRC: First Read
 - April MRC: Vote
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- *Reference: M34: 8.6.1 - Quick Fix process*

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