Non-Retail BTMG Reporting in Capacity Exchange

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Tech Change Forum Special Session
June 16, 2020

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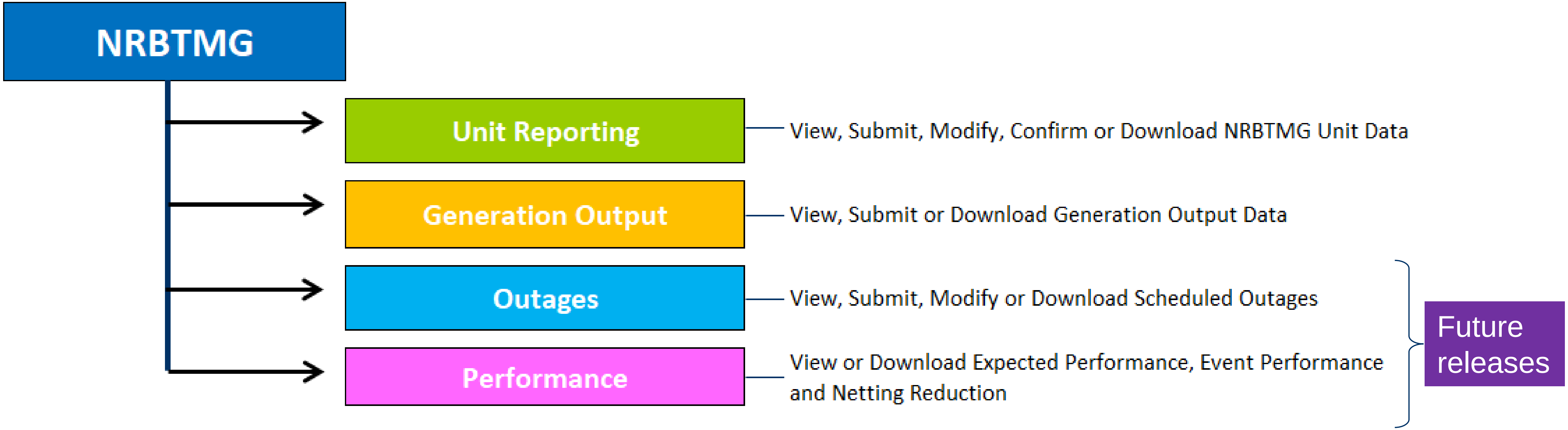
Impact Details

Action Required	Deadline	Who May Be Affected
PJM to educate responsible LSEs/EDCs on new NRBTMG screens recently released in Capacity Exchange.	**June 16, 2020 10:00 -11:30 AM TCF Special Session**	LSEs/EDCs that are responsible to report on NRBTMG located in modeled wholesale area in zone
Report and confirm NRBTMG unit data in the DY Reporting & Confirmation screen during the reporting window. Window opens June 15.	**July 31, 2020**	LSEs/EDCs that are responsible to report on NRBTMG located in modeled wholesale area in zone
Report NRBTMG generation output data in Coincident Peak Hour screen during the reporting window. Window opens November 1.	**November 30, 2020**	LSEs/EDCs that are responsible to report on NRBTMG located in modeled wholesale area in zone

Objective

- The objective of this session is to educate responsible LSEs/EDCs on the new Non-Retail Behind the Meter Generation (NRBTMG) screens that were recently released to Capacity Exchange.
- NRBTMG screens are to be used by responsible LSEs/EDCs to satisfy their Non-Retail BTMG requirements in Manual 14D, Appendix A: Behind the Meter Generation Business Rules.
- NRBTMG screens are intended to replace the manual submittal of NRBTMG templates to BTMG@pjm.com.

NRBTMG Menu in Capacity Exchange



NRBTMG

- **Unit Reporting** — View, Submit, Modify, Confirm or Download NRBTMG Unit Data
- **Generation Output** — View, Submit or Download Generation Output Data
- **Outages** — View, Submit, Modify or Download Scheduled Outages
- **Performance** — View or Download Expected Performance, Event Performance and Netting Reduction

Future releases

NRBTMG menu is used to administer the reporting, netting, and operational performance requirements of Non-Retail BTMG that are in Manual 14D, Appendix A.

Schedule for NRBTMG Screens

Menu Area	Screen	Release Date
Unit Reporting	NRBTMG Characteristics	June 11
	Reporting & Confirmation	June 11
	Change Request	Nov 30
Generation Output	Coincident Peak Hours	June 11
	Event Hours	Nov 30
Outages	Outages	2021
Performance	Expected Performance	Nov 30
	Event Performance	2021
	Netting Reduction	2021

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Who is the responsible LSE/EDC in Capacity Exchange?

- LSE account that is assigned the obligation peak load (OPL) value on June 1 of the Delivery Year for the entire modeled wholesale area is responsible to report on Non-Retail BTMG units located in the wholesale area for such Delivery Year.
- EDC account will have the responsibility to report if there are multiple LSEs that serve load in the modeled wholesale area or if there are multiple LSEs that serve load in Rest of Zone area.
    - Rest of Zone area = Transmission zone – modeled wholesale areas in Capacity Exchange

What is Non-retail BTMG?

Behind the Meter Generation that is used by municipal electric systems, electric cooperatives, and electric distribution companies to serve load.

Unit delivers energy to load without using the transmission system or any distribution facilities, unless permission to use such distribution facilities is granted from owner, lessee, or operator.

Does not include any portion of the output of such unit that is participating in PJM Markets for the current Delivery Year and is expected to be participating in PJM Markets during coincident peak hours

Does not include a generation facility that is dedicated to a retail end-use program that directly offsets retail charges (e.g., Net Energy Metering, Community Solar, or Aggregate Net Energy Metering)

Unit Reporting Area

NRBTMG Characteristics

- View modeled NRBTMG unit characteristic data
  - Static data that is not expected to change each delivery year

Reporting & Confirmation

- View, modify or confirm specific NRBTMG unit data for a Delivery Year
  - Summer rated ICAP value
  - ICAP MWs in PJM Markets
  - DR Hub registration ID

Change Request

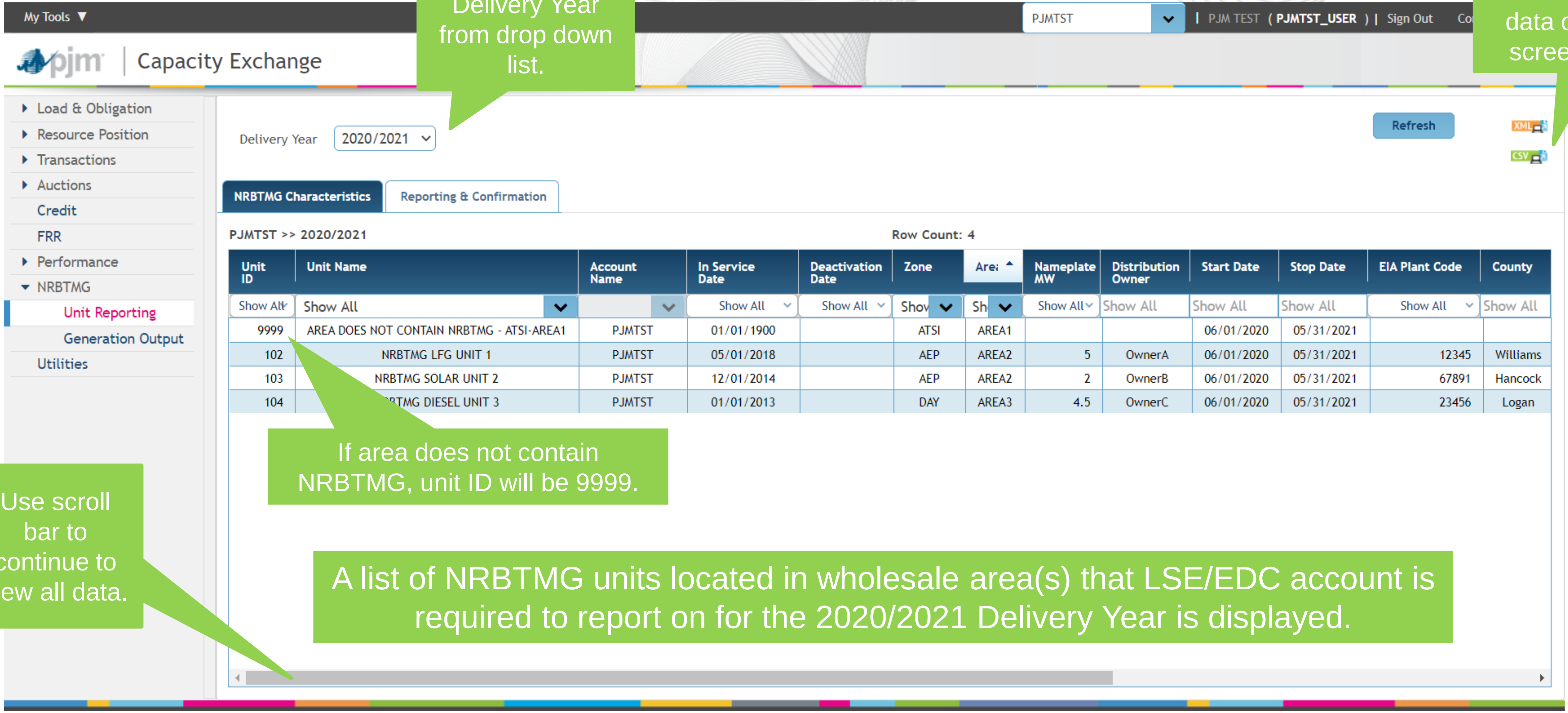
Future Release in Nov.

- Submit “New unit” change request to initiate the modeling of a new unit
- Submit “Existing unit” change request to request modification to previously submitted unit data or submit deactivation date
- View previously submitted change requests

Pre-population of Unit Data

- PJM pre-populated the Capacity Exchange database with NRBTMG unit data submitted to PJM for 2019/2020 Delivery Year via NRBTMG reporting templates.
- Responsible LSE/EDC for a modeled wholesale area in the 2019/2020 Delivery Year can view PJM’s record of NRBTMG unit data for units located in such area for 2019/2020 Delivery Year.
- PJM carried over the NRBTMG unit data reported for a modeled wholesale area in the 2019/2020 Delivery Year into the 2020/2021 Delivery Year with the exception of DR Hub Registration ID data and ICAP MW in PJM Markets data.
- Responsible LSE/EDC for a modeled wholesale area in the 2020/2021 Delivery Year must review and confirm NRBTMG unit data for 2020/2021 Delivery Year during the June 15 - July 31, 2020 reporting window.
- For each annual reporting window that opens in June of a Delivery Year, PJM will continue to carry over a wholesale area’s NRBTMG unit data reported from the prior delivery year.

NRBTMG Characteristics Screen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Unit Reporting
Generation Output
Utilities
Refresh
XML
CSV
NRBTMG Characteristics
Reporting & Confirmation
Show All

Delivery Year 2020/2021

PJMTST >> 2020/2021

Row Count: 4

Unit ID	Unit Name	Account Name	In Service Date	Deactivation Date	Zone	Are	Nameplate MW	Distribution Owner	Start Date	Stop Date	EIA Plant Code	County
9999	AREA DOES NOT CONTAIN NRBTMG - ATSI-AREA1	PJMTST	01/01/1900		ATSI	AREA1			06/01/2020	05/31/2021		
102	NRBTMG LFG UNIT 1	PJMTST	05/01/2018		AEP	AREA2	5	OwnerA	06/01/2020	05/31/2021	12345	Williams
103	NRBTMG SOLAR UNIT 2	PJMTST	12/01/2014		AEP	AREA2	2	OwnerB	06/01/2020	05/31/2021	67891	Hancock
104	RTMG DIESEL UNIT 3	PJMTST	01/01/2013		DAY	AREA3	4.5	OwnerC	06/01/2020	05/31/2021	23456	Logan

Select desired Delivery Year from drop down list.

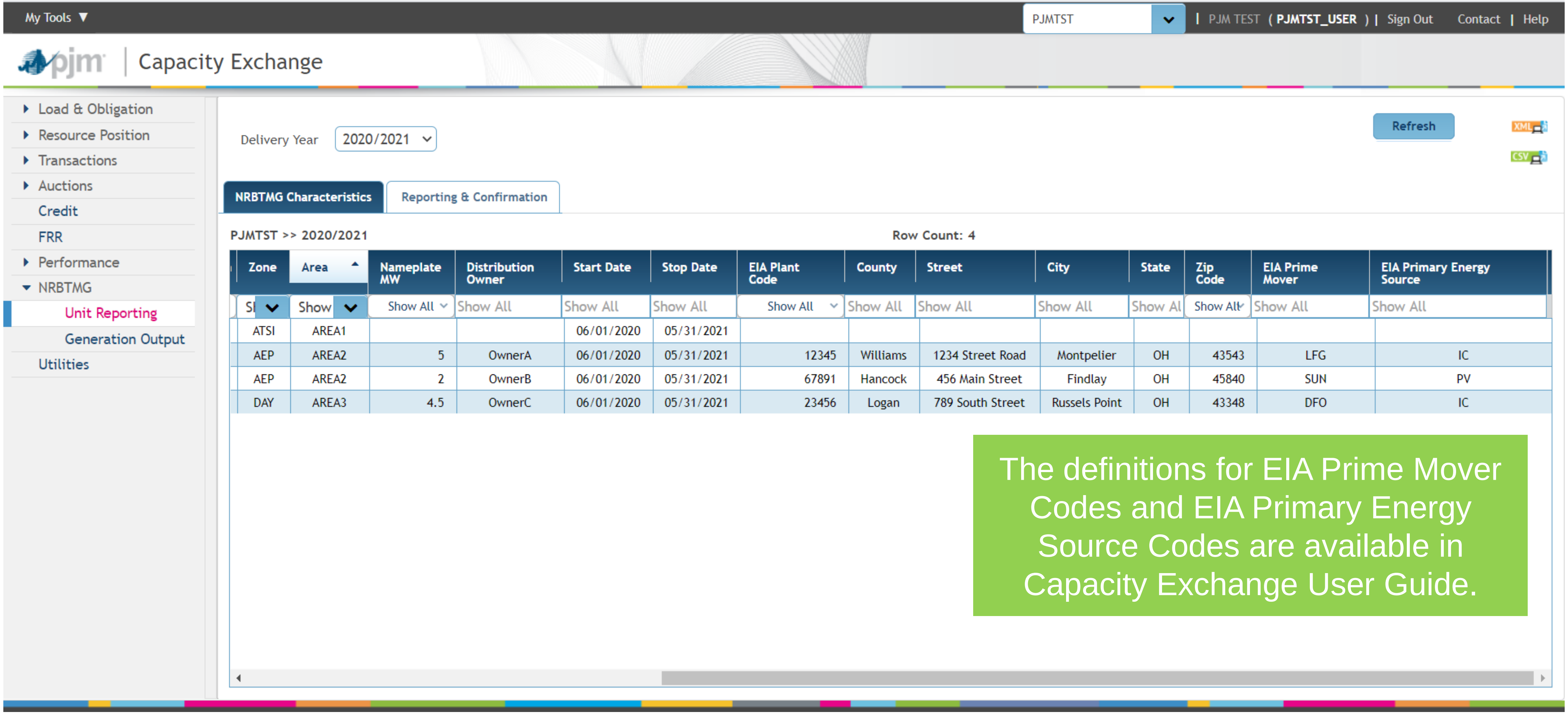
Download data on screen

If area does not contain NRBTMG, unit ID will be 9999.

Use scroll bar to continue to view all data.

A list of NRBTMG units located in wholesale area(s) that LSE/EDC account is required to report on for the 2020/2021 Delivery Year is displayed.

NRBTMG Characteristics Screen (Continued)



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NRBTMG
Unit Reporting
Generation Output
Utilities
Refresh
XML
CSV
NRBTMG Characteristics
Reporting & Confirmation

Delivery Year: 2020/2021

PJMTST >> 2020/2021

Row Count: 4

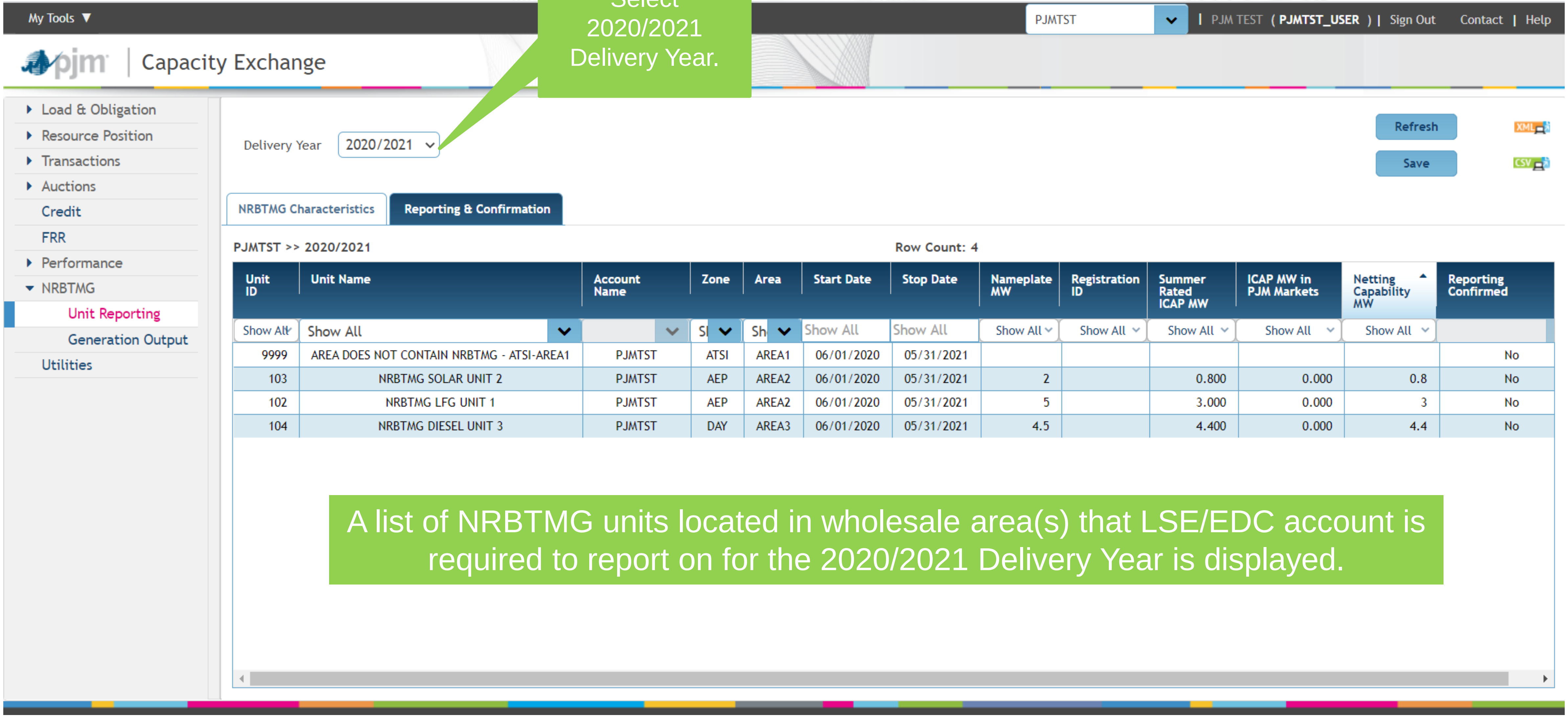
Zone	Area	Nameplate MW	Distribution Owner	Start Date	Stop Date	EIA Plant Code	County	Street	City	State	Zip Code	EIA Prime Mover	EIA Primary Energy Source
Sl	Show	Show All	Show All	Show All	Show All	Show All	Show All	Show All	Show All	Show Al	Show All	Show All	Show All
ATSI	AREA1			06/01/2020	05/31/2021								
AEP	AREA2	5	OwnerA	06/01/2020	05/31/2021	12345	Williams	1234 Street Road	Montpelier	OH	43543	LFG	IC
AEP	AREA2	2	OwnerB	06/01/2020	05/31/2021	67891	Hancock	456 Main Street	Findlay	OH	45840	SUN	PV
DAY	AREA3	4.5	OwnerC	06/01/2020	05/31/2021	23456	Logan	789 South Street	Russels Point	OH	43348	DFO	IC

The definitions for EIA Prime Mover Codes and EIA Primary Energy Source Codes are available in Capacity Exchange User Guide.

Can I update data on the Characteristics Screen?

- NRBTMG Characteristics screen is a read-only screen.
- Characteristics screen displays NRBTMG unit data by the selected Delivery Year.
- Only the responsible LSE/EDC for the modeled wholesale area for the selected Delivery Year can view the characteristic data for NRBTMG units located in such modeled wholesale area.
- Until the Change Request screen is released into production, a request to update specific data on the Characteristics screen must be submitted by the responsible LSE/EDC to CapacityExchangeSupport@pjm.com.

Reporting & Confirmation screen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Performance
NRBTMG
Unit Reporting
Generation Output
Utilities
Refresh
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CSV
NRBTMG Characteristics
Reporting & Confirmation

Select 2020/2021 Delivery Year.

Delivery Year: 2020/2021

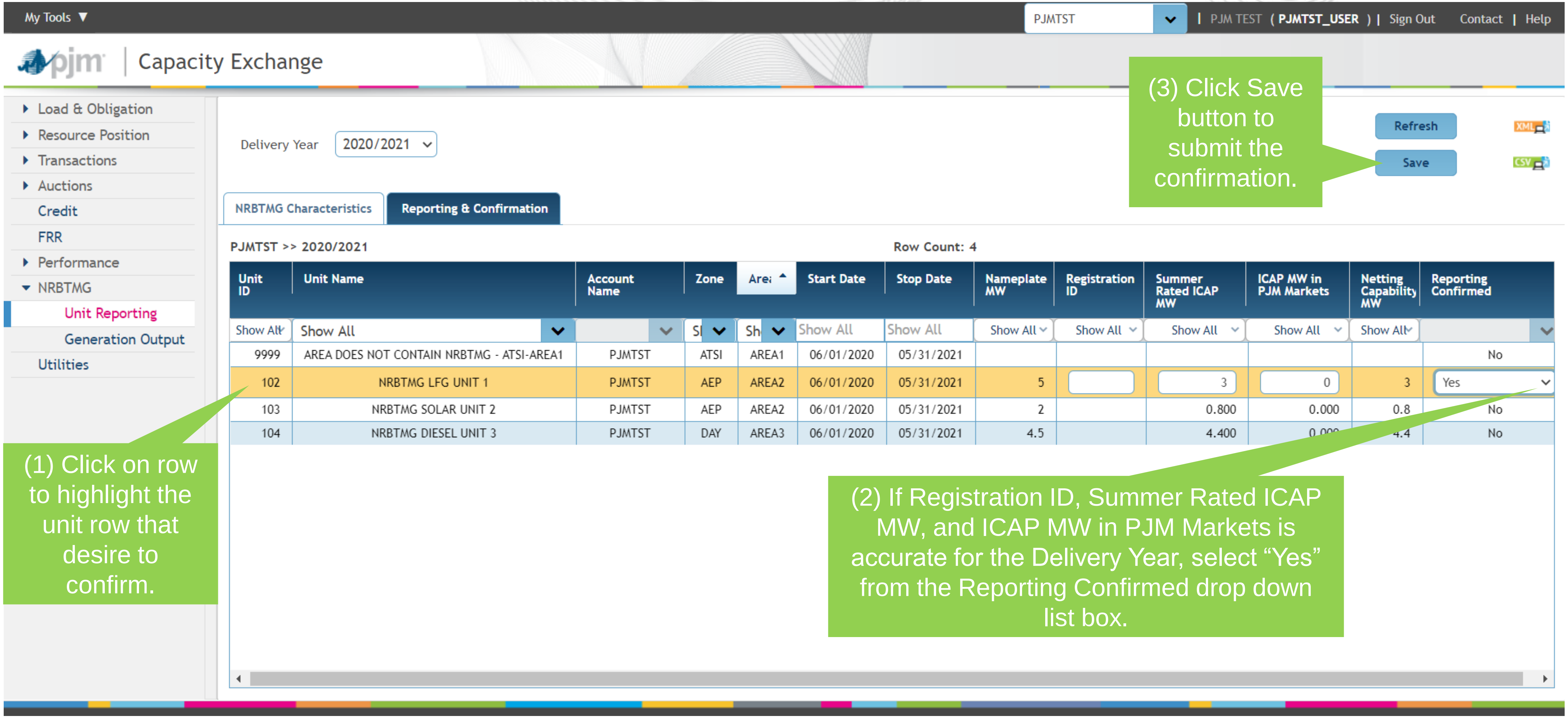
PJMTST >> 2020/2021

Row Count: 4

Unit ID	Unit Name	Account Name	Zone	Area	Start Date	Stop Date	Nameplate MW	Registration ID	Summer Rated ICAP MW	ICAP MW in PJM Markets	Netting Capability MW	Reporting Confirmed
Show All	Show All		Sh	Sh	Show All	Show All	Show All	Show All	Show All	Show All	Show All	
9999	AREA DOES NOT CONTAIN NRBTMG - ATSI-AREA1	PJMTST	ATSI	AREA1	06/01/2020	05/31/2021						No
103	NRBTMG SOLAR UNIT 2	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	2		0.800	0.000	0.8	No
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	5		3.000	0.000	3	No
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	06/01/2020	05/31/2021	4.5		4.400	0.000	4.4	No

A list of NRBTMG units located in wholesale area(s) that LSE/EDC account is required to report on for the 2020/2021 Delivery Year is displayed.

How to Confirm Data on the Reporting & Confirmation Screen



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Auctions
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Performance
NRBTMG
Unit Reporting
Generation Output
Utilities
Refresh
Save
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CSV
NRBTMG Characteristics
Reporting & Confirmation

Delivery Year: 2020/2021

PJMTST >> 2020/2021

Row Count: 4

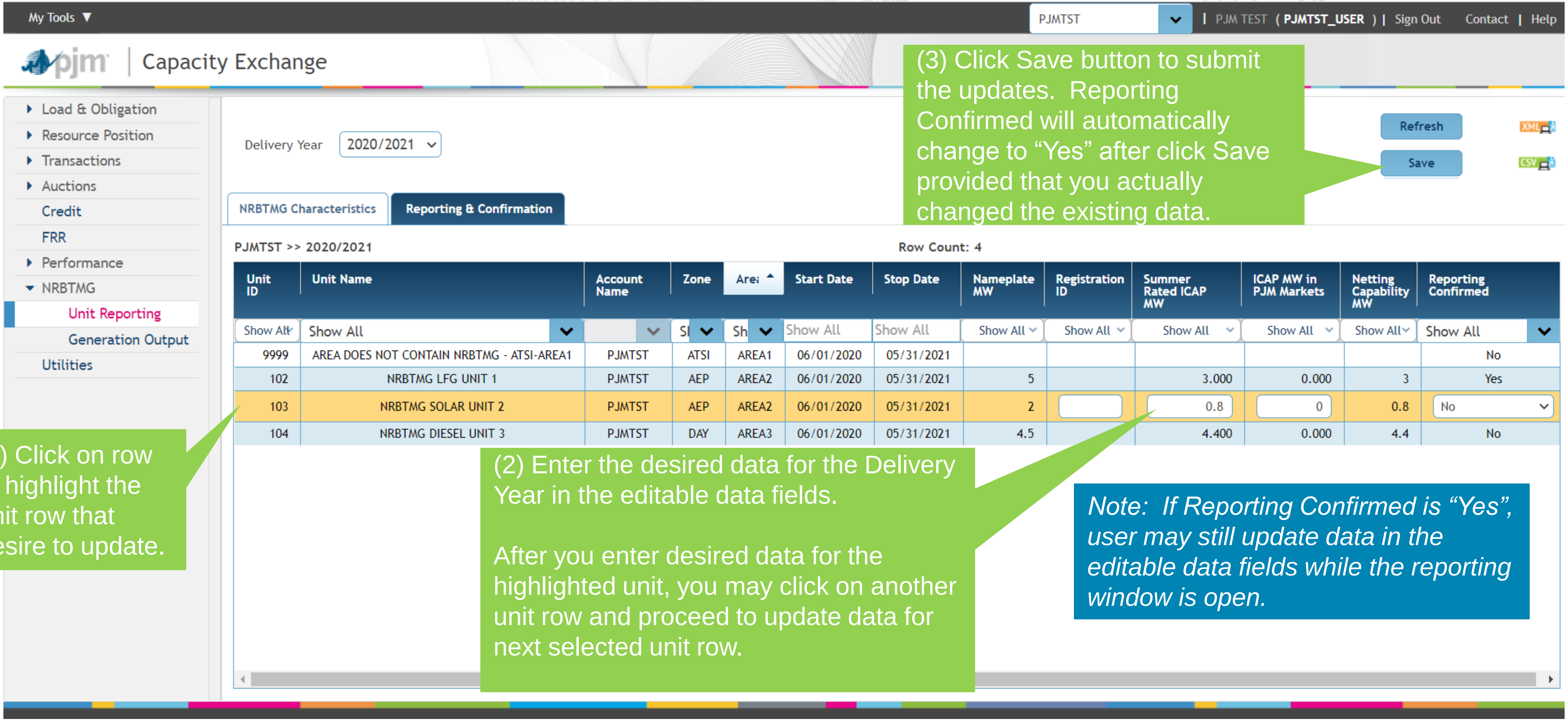
Unit ID	Unit Name	Account Name	Zone	Are	Start Date	Stop Date	Nameplate MW	Registration ID	Summer Rated ICAP MW	ICAP MW in PJM Markets	Netting Capability MW	Reporting Confirmed
Show All	Show All		Sl	Sh	Show All	Show All	Show All	Show All	Show All	Show All	Show All	
9999	AREA DOES NOT CONTAIN NRBTMG - ATSI-AREA1	PJMTST	ATSI	AREA1	06/01/2020	05/31/2021						No
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	5		3	0	3	Yes
103	NRBTMG SOLAR UNIT 2	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	2		0.800	0.000	0.8	No
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	06/01/2020	05/31/2021	4.5		4.400	0.000	4.4	No

(1) Click on row to highlight the unit row that desire to confirm.

(2) If Registration ID, Summer Rated ICAP MW, and ICAP MW in PJM Markets is accurate for the Delivery Year, select "Yes" from the Reporting Confirmed drop down list box.

(3) Click Save button to submit the confirmation.

How to Update Unit Data on Reporting & Confirmation Screen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FRR
Performance
NRBTMG
Unit Reporting
Generation Output
Utilities
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XML
CSV
NRBTMG Characteristics
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Delivery Year: 2020/2021

PJMTST >> 2020/2021

Row Count: 4

Unit ID	Unit Name	Account Name	Zone	Area	Start Date	Stop Date	Nameplate MW	Registration ID	Summer Rated ICAP MW	ICAP MW in PJM Markets	Netting Capability MW	Reporting Confirmed
9999	AREA DOES NOT CONTAIN NRBTMG - ATSI-AREA1	PJMTST	ATSI	AREA1	06/01/2020	05/31/2021						No
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	5		3.000	0.000	3	Yes
103	NRBTMG SOLAR UNIT 2	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	2		0.8	0	0.8	No
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	06/01/2020	05/31/2021	4.5		4.400	0.000	4.4	No

(1) Click on row to highlight the unit row that desire to update.

(2) Enter the desired data for the Delivery Year in the editable data fields.

After you enter desired data for the highlighted unit, you may click on another unit row and proceed to update data for next selected unit row.

(3) Click Save button to submit the updates. Reporting Confirmed will automatically change to “Yes” after click Save provided that you actually changed the existing data.

Note: If Reporting Confirmed is “Yes”, user may still update data in the editable data fields while the reporting window is open.

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Editable Data Fields on Reporting & Confirmation Screen

Registration ID

- Enter the registration ID for the current Delivery Year if the unit is included in Pre-Emergency, Emergency, or Economic Load Response registration for such Delivery Year.

Summer Rated ICAP MW

- Enter the Summer Rated ICAP Value of unit.
  - Represents capability of unit at the expected time of the PJM summer peak.
  - Determined by responsible LSE/EDC applying methodology similar to determining Summer Net Capability for resource type in Manual 21, section 2.

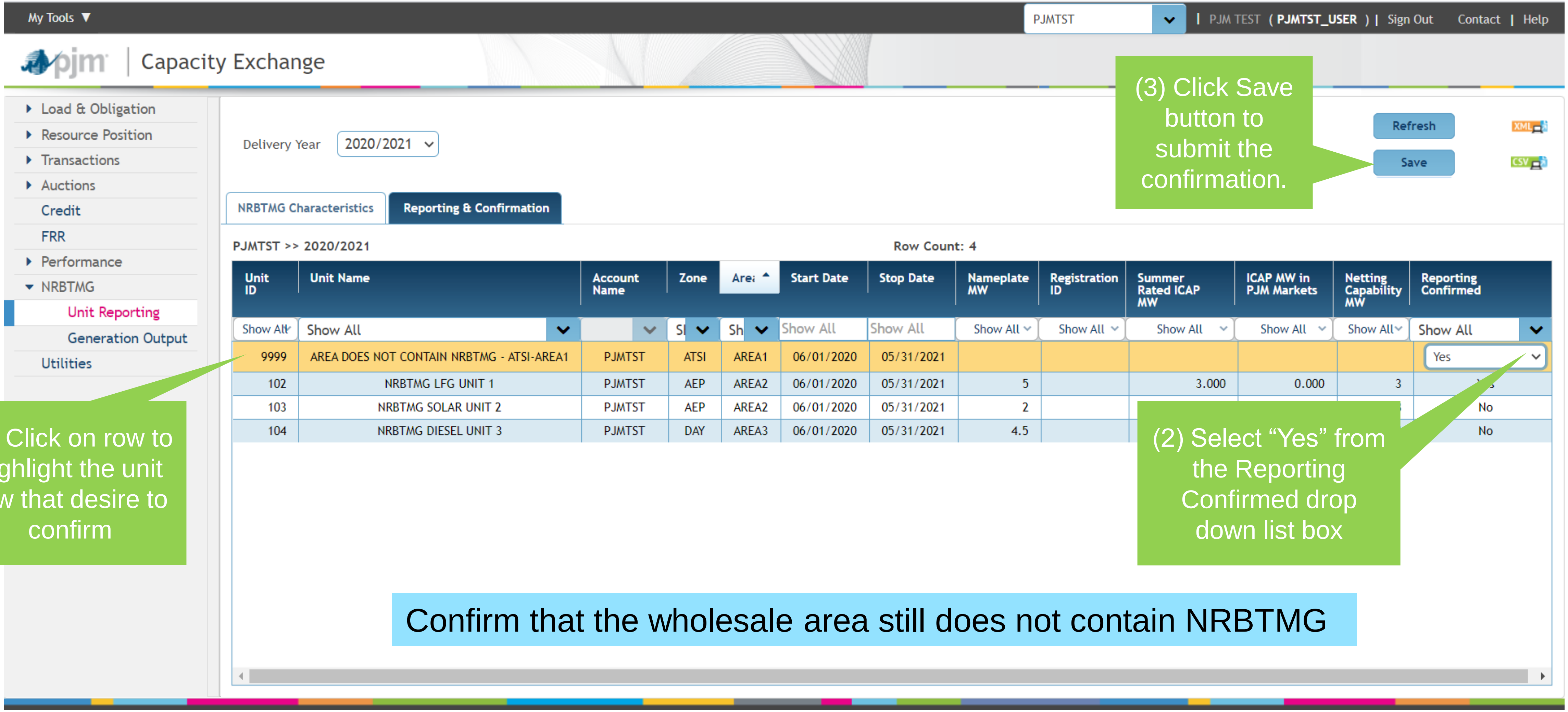
ICAP MW in PJM Markets

- Enter the amount of ICAP MWs that are participating in PJM Markets for the current Delivery Year (as a Capacity Resource, Energy Resource, or in the Pre-Emergency Emergency, Emergency, or Economic Load Response program) and are expected to participate in PJM markets during coincident peak hours.

Can I confirm multiple unit rows at once?

- At this time, a user may only confirm a single unit row at a time.
- If updates were entered for multiple units and saved, Reporting Confirmed will automatically be “Yes” for the multiple units.
- For LSE/EDCs that have a large number of NRBTMG units to confirm which require no updates, you may submit a request to set the Reporting Confirmed to “Yes” for such NRBTMG units to CapacityExchangeSupport@pjm.com.
- Future fix to allow the confirmation of multiple unit rows has been requested.

What if the Area still does not contain NRBTMG?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Auctions
Credit
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Performance
NRBTMG
Unit Reporting
Generation Output
Utilities
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NRBTMG Characteristics
Reporting & Confirmation

Delivery Year: 2020/2021

PJMTST >> 2020/2021 Row Count: 4

Unit ID	Unit Name	Account Name	Zone	Area	Start Date	Stop Date	Nameplate MW	Registration ID	Summer Rated ICAP MW	ICAP MW in PJM Markets	Netting Capability MW	Reporting Confirmed
Show All	Show All		Sh	Sh	Show All	Show All	Show All	Show All	Show All	Show All	Show All	Show All
9999	AREA DOES NOT CONTAIN NRBTMG - ATSI-AREA1	PJMTST	ATSI	AREA1	06/01/2020	05/31/2021						Yes
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	5		3.000	0.000	3	
103	NRBTMG SOLAR UNIT 2	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	2					No
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	06/01/2020	05/31/2021	4.5					No

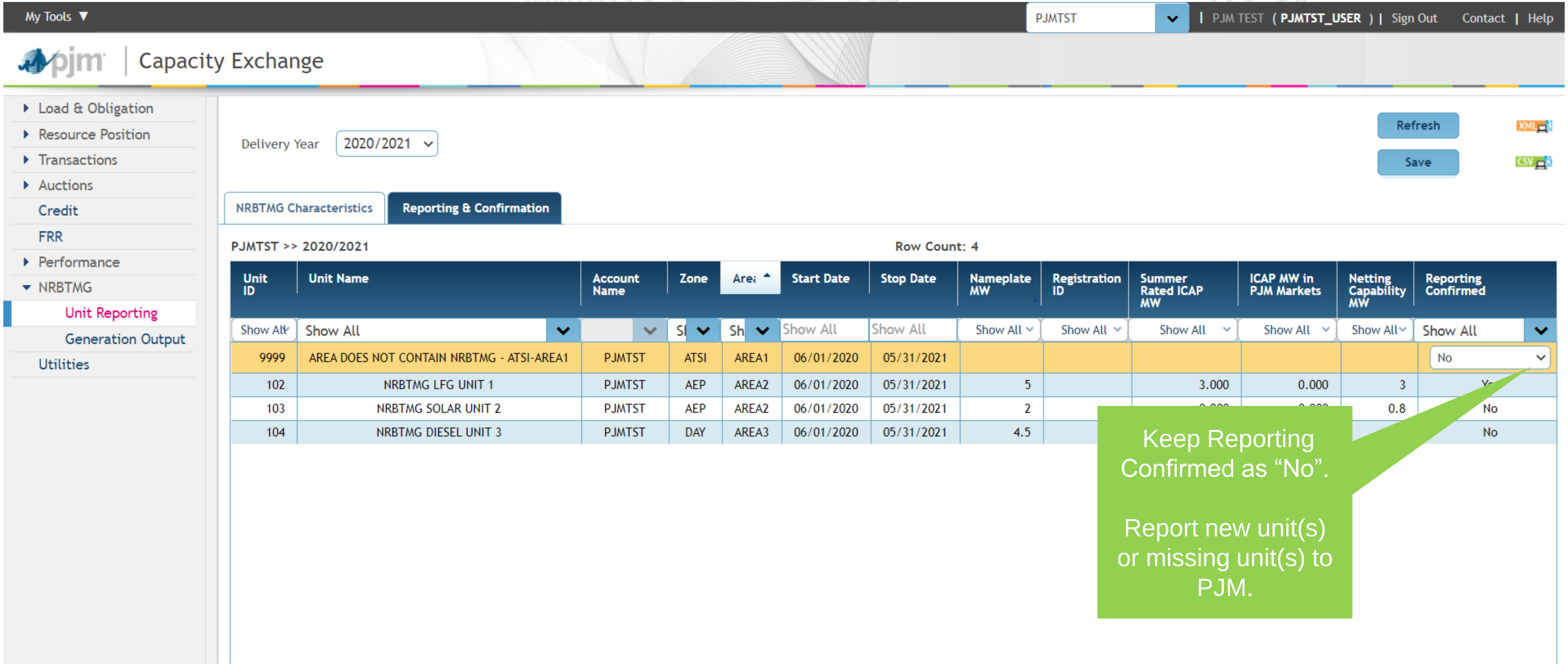
(3) Click Save button to submit the confirmation.

(1) Click on row to highlight the unit row that desire to confirm

(2) Select "Yes" from the Reporting Confirmed drop down list box

Confirm that the wholesale area still does not contain NRBTMG

What if the Area does contains NRBTMG but is listed as does not contain NRBTMG?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Load & Obligation
Resource Position
Transactions
Auctions
Credit
FRR
Performance
NRBTMG
Unit Reporting
Generation Output
Utilities
Refresh
Save
XML
CSV
NRBTMG Characteristics
Reporting & Confirmation

Delivery Year: 2020/2021

PJMTST >> 2020/2021

Row Count: 4

Unit ID	Unit Name	Account Name	Zone	Area	Start Date	Stop Date	Nameplate MW	Registration ID	Summer Rated ICAP MW	ICAP MW in PJM Markets	Netting Capability MW	Reporting Confirmed
Show All	Show All		Sh	Sh	Show All	Show All	Show All	Show All	Show All	Show All	Show All	Show All
9999	AREA DOES NOT CONTAIN NRBTMG - ATSI-AREA1	PJMTST	ATSI	AREA1	06/01/2020	05/31/2021						No
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	5		3.000	0.000	3	Y
103	NRBTMG SOLAR UNIT 2	PJMTST	AEP	AREA2	06/01/2020	05/31/2021	2				0.8	No
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	06/01/2020	05/31/2021	4.5					No

Keep Reporting Confirmed as "No".

Report new unit(s) or missing unit(s) to PJM.

How do I report a new unit or a missing unit?

- Until the Change Request screen is released into production, a new unit or a missing unit must be reported to PJM to initiate the modeling of the unit in Capacity Exchange.
- Please complete and submit a NRBTMG reporting template for only the new and/or missing unit(s) to CapacityExchangeSupport@pjm.com
  - https://www.pjm.com/-/media/markets-ops/rpm/non-retail-behind-the-meter-reporting-template.ashx?la=en
- PJM will only model a NRBTMG unit that has a nameplate capacity that is equal to or greater than 0.1 MW.
- New unit is to be reported to PJM no later than 31 days after the in-service date.
- PJM's preference is to model a new unit in Capacity Exchange after the unit is actually in-service as opposed to modeling future units.

Generation Output Area

Coincident Peak Hours

- Submit and view hourly generation output data during coincident peak hours

Event Hours

Future Release in Nov.

- Submit and view hourly generation output data during an Emergency Event that is subject to performance compliance

Pre-Population of Generation Output Data for 11/01/2018-10/31/2019 Reporting Period

- PJM pre-populated the Capacity Exchange database with NRBTMG generation output data for the coincident peak hours that occurred during the 11/01/2018-10/31/2019 reporting period and was reported to PJM via NRBTMG generation output templates in November 2019.

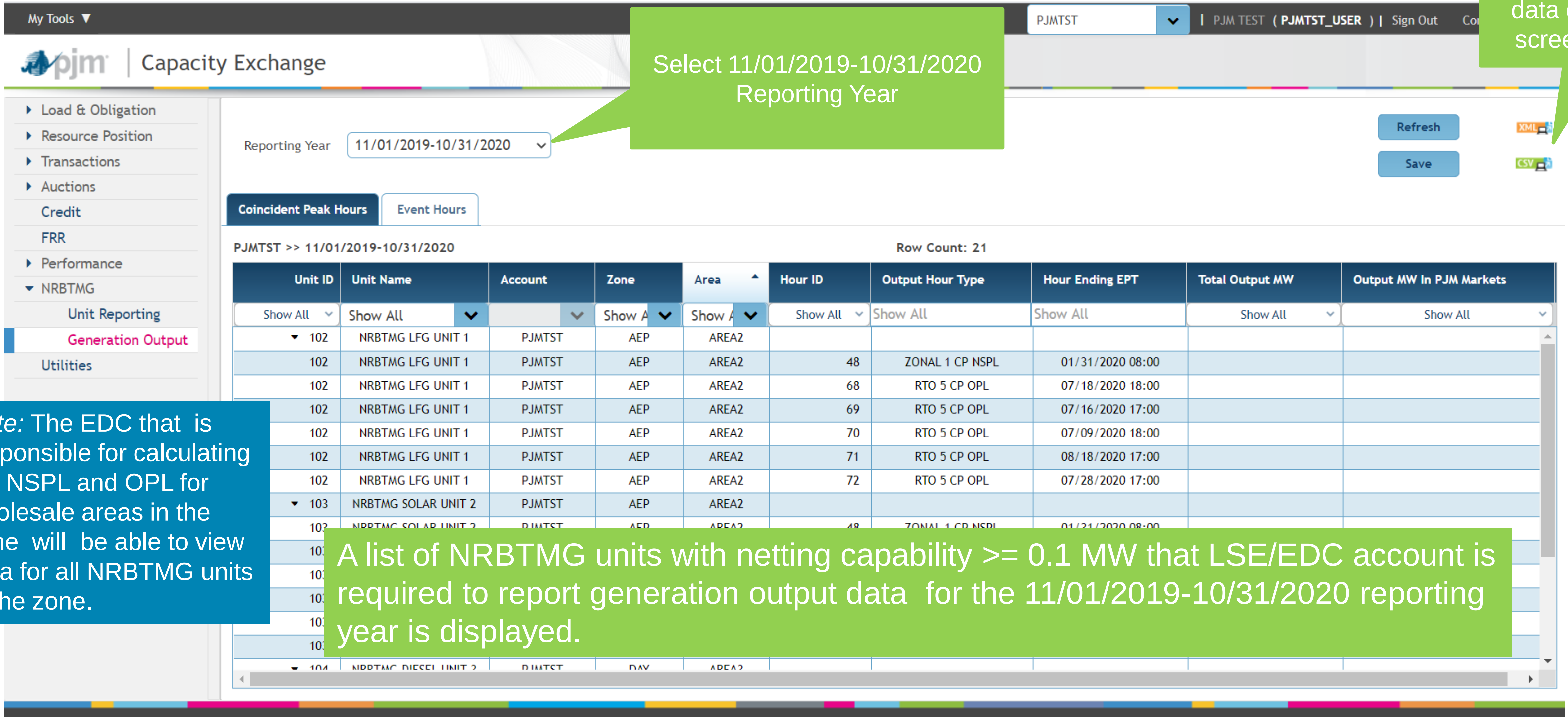
- Responsible LSE/EDC for a modeled wholesale area in the 2019/2020 Delivery Year will be able to view PJM's record of generation output data for the 11/01/2018-10/31/2019 reporting period.

Coincident Peak Hours Screen for 11/01/2019-10/31/2020 Reporting Period

- PJM will populate the coincident peak hours used in determining network service peak load (NSPL) values for 2021 calendar year and obligation peak load values (OPL) values for the 2021/2022 Delivery Year by October 31, 2020.

- Coincident Peak Hours Screen will be open to submit generation output data for the 11/01/2019-10/31/2020 reporting period on November 1, 2020 and will close on November 30, 2020.

Coincident Peak Hours screen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Unit Reporting
Generation Output
Utilities
Refresh
Save
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Coincident Peak Hours
Event Hours

Reporting Year: 11/01/2019-10/31/2020

PJMTST >> 11/01/2019-10/31/2020

Row Count: 21

Unit ID	Unit Name	Account	Zone	Area	Hour ID	Output Hour Type	Hour Ending EPT	Total Output MW	Output MW In PJM Markets
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2					
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	48	ZONAL 1 CP NSPL	01/31/2020 08:00		
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	68	RTO 5 CP OPL	07/18/2020 18:00		
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	69	RTO 5 CP OPL	07/16/2020 17:00		
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	70	RTO 5 CP OPL	07/09/2020 18:00		
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	71	RTO 5 CP OPL	08/18/2020 17:00		
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	72	RTO 5 CP OPL	07/28/2020 17:00		
103	NRBTMG SOLAR UNIT 2	PJMTST	AEP	AREA2					

Select 11/01/2019-10/31/2020 Reporting Year

Download data on screen

Note: The EDC that is responsible for calculating the NSPL and OPL for wholesale areas in the zone will be able to view data for all NRBTMG units in the zone.

A list of NRBTMG units with netting capability >= 0.1 MW that LSE/EDC account is required to report generation output data for the 11/01/2019-10/31/2020 reporting year is displayed.

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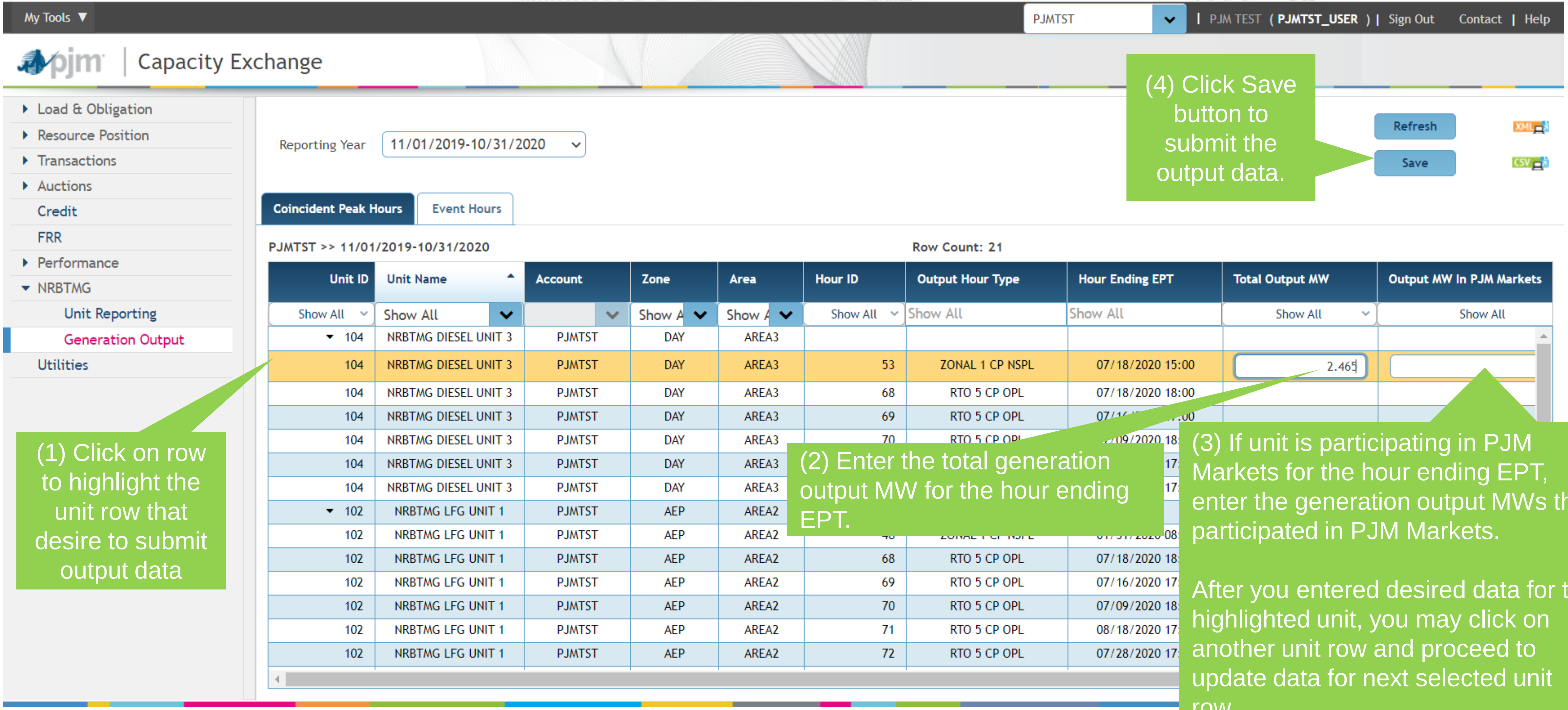
How to Submit Output data on Coincident Peak Hours Screen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Transactions
Auctions
Credit
FRR
Performance
NRBTMG
Unit Reporting
Generation Output
Utilities
Refresh
Save
XML
CSV
Coincident Peak Hours
Event Hours

Reporting Year 11/01/2019-10/31/2020

PJMTST >> 11/01/2019-10/31/2020

Row Count: 21

Unit ID	Unit Name	Account	Zone	Area	Hour ID	Output Hour Type	Hour Ending EPT	Total Output MW	Output MW In PJM Markets
Show All	Show All		Show All	Show All	Show All	Show All	Show All	Show All	Show All
▾ 104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3					
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	53	ZONAL 1 CP NSPL	07/18/2020 15:00	2.465	
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	68	RTO 5 CP OPL	07/18/2020 18:00		
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	69	RTO 5 CP OPL			
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3	70				
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3					
104	NRBTMG DIESEL UNIT 3	PJMTST	DAY	AREA3					
▾ 102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2					
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2					
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	68	RTO 5 CP OPL			
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	69	RTO 5 CP OPL			
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	70	RTO 5 CP OPL			
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	71	RTO 5 CP OPL			
102	NRBTMG LFG UNIT 1	PJMTST	AEP	AREA2	72	RTO 5 CP OPL			

(4) Click Save button to submit the output data.

(1) Click on row to highlight the unit row that desire to submit output data

(2) Enter the total generation output MW for the hour ending EPT.

(3) If unit is participating in PJM Markets for the hour ending EPT, enter the generation output MWs that participated in PJM Markets.

After you entered desired data for the highlighted unit, you may click on another unit row and proceed to update data for next selected unit row.

Need Help?

- Capacity Exchange User Guide
  - https://www.pjm.com/-/media/etools/capacity-exchange/capacity-exchange-user-guide.ashx?la=en

- Email questions to CapacityExchangeSupport@pjm.com

- Contact Terri Esterly or Connie Ding
  - theresa.esterly@pjm.com
  - congmei.ding@pjm.com