

Markets Gateway - New Process to Submit Exception Request for Offer Verification

As of October 16, 2023

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Impact Details

Action Required	Deadline	Who May Be Affected
Functionality Enabled in Production	12/01/2023	Participants that submit Offers to Markets Gateway
Functionality Enabled in Train	10/04/2023	Participants that submit Offers to Markets Gateway
Education on Energy Offer Verification Process	12/06/2023	Notify relevant employees, All Stakeholders
Register for education session	12/06/2023	Participants that submit Offers to Markets Gateway
Review training materials	N/A	Participants that submit Offers to Markets Gateway, All Stakeholders



- Offers > \$1,000 are capped at \$1,000 in Markets Gateway
 - Stakeholders have the opportunity to submit an Exception Request
 - Supporting documentation required for PJM to review request
- New feature requires participants to submit supporting documentation for Exception Requests directly in Markets Gateway > Schedules > Fuel Price Exceptions page
 - Approved Fuel Cost Policy
 - Documentation of actual or estimated fuel price (i.e. receipt/screenshot of quote)
 - Cost Development Calculation example
- Sharepoint submission will no longer be supported



Offer Verification Process Overview - Updated

- Submit Offers to the Offer Updates screen in Markets Gateway
- Offers submitted over \$1,000 are subject to Markets Gateway automated screen validation
 - Offers that fail validation will be capped at \$1,000 or highest approved segment
- Stakeholders have the opportunity to submit an Exception Request for offers that fail validation via the Fuel Price Exceptions screen
 - Supporting documentation now submitted directly on this screen
- Exception Requests that are submitted via the updated Fuel Price
 Exceptions screen are only valid for offers > \$1,000 & fail validation

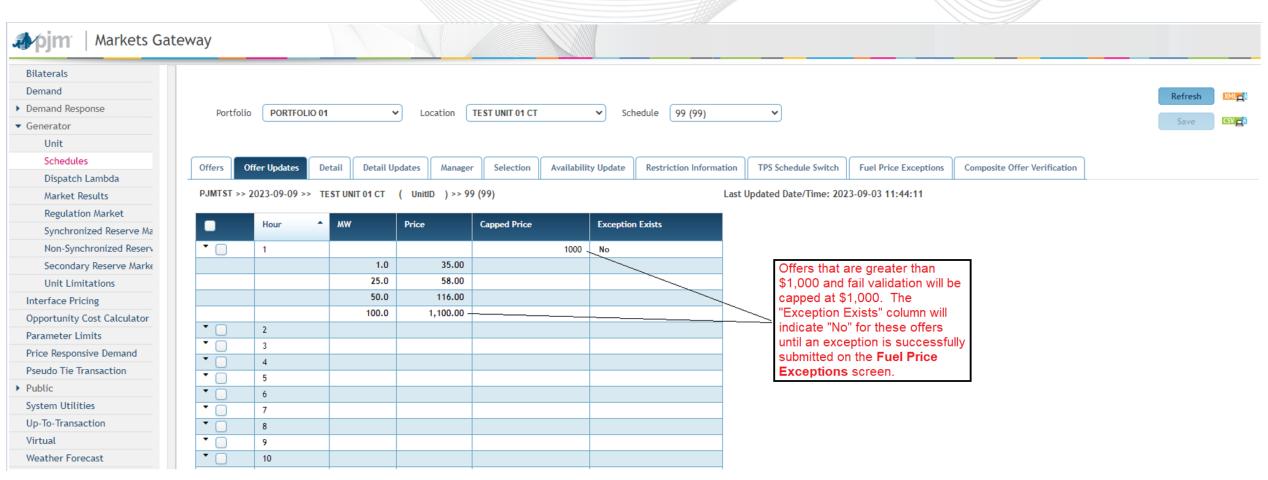
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- Go-live date: December 1, 2023
 - Available in Markets Gateway TRN: October 4, 2023
- New screen in Markets Gateway enhances the current process by:
 - Simplifying Exception Request submission for Stakeholders
 - Simplifying Exception Request processing for PJM
 - Removing the need for SharePoint and additional user accounts
 - XML submissions supported
- Markets Gateway User Guide & External Interface Specification Guide will be updated to reflect this new enhancement
- Manual 11 Language changes/endorsement in progress



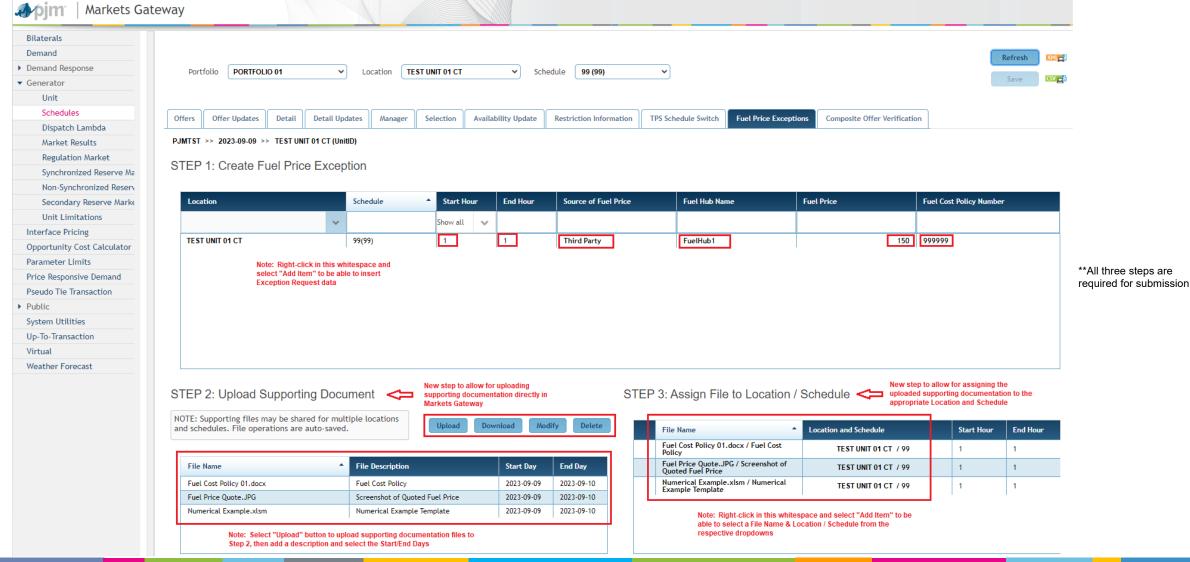
Submit Offers on Offer Updates Screen



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Sample Submission of Exception Request



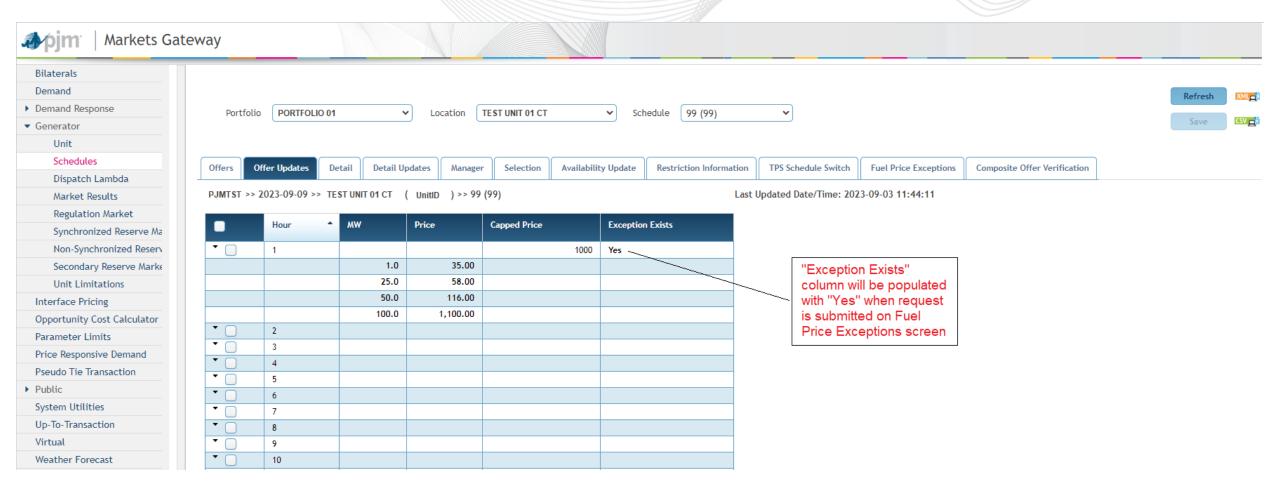
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- All fields are required including the file name, description, and start/end dates
 - Files can be applicable for and span multiple days
- A user cannot submit duplicate file names for a unit. Please add specifics to file name such as a date to make every file name unique
 - Example: quote.jpg cannot be submitted twice including for different days
- All files uploaded are subject to virus scanning by PJM
- Individual file uploads cannot exceed 500MB
- Avoid uploading zip files



Verify Exception Request Submitted



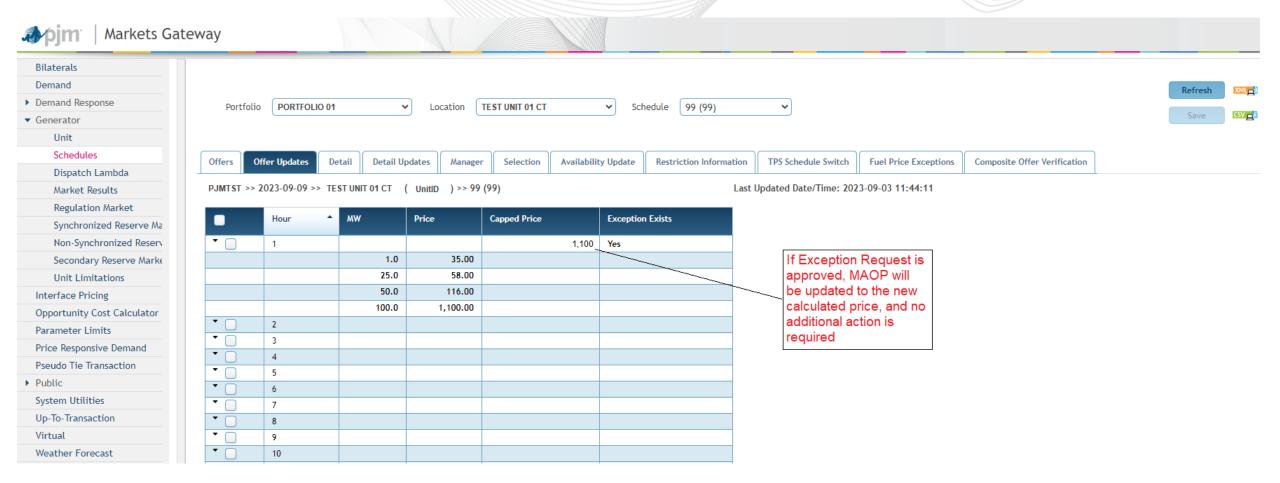
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- All 3 steps on Exceptions screen are required for a successful submission
- PJM will review Fuel Cost Policy in addition to supporting documentation submitted to Markets Gateway via STEP 2 of Fuel Price Exceptions screen to determine if exception should be granted
 - Verify Exception submitted successfully via "Exception Exists" column on Offer Updates page changing from "No" to "Yes"
- If Exception Request is approved, the Max Allowable Offer Price (MAOP) will be updated and any segments at or below MAOP will be considered passed
- No additional action will be required if Exception Request is approved
- Stakeholders will be notified via the "Capped Price" column in the Offer Updates screen of Markets Gateway



After Exception Request is Submitted



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Markets Gateway – Offer Verification



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