Competitive Planner

Tech Change Forum
June 16, 2020
Ilyana Dropkin
Engineer, Transmission Planning
• Added information about the beta test
• Added registration information
• Added details about how to access the application
<table>
<thead>
<tr>
<th>Product - Action Required</th>
<th>Deadline</th>
<th>Who May Be Affected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Register for Competitive Planner</td>
<td><strong>June 22, 2020</strong> *</td>
<td>Anyone who is pre-qualified for PJM competitive planning process</td>
</tr>
<tr>
<td>Utilize Competitive Planner in production environment</td>
<td><strong>July 1, 2020</strong> *</td>
<td>Anyone who is pre-qualified for PJM competitive planning process</td>
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* Tentative
• Current Process
  – PJM process for proposal submission relies on an Excel Proposal Template.
  – Upon filling out the template, stakeholders would log into Secure Share to securely transfer files to PJM
What is Competitive Planner?

The PJM competitive planning process implements FERC Order 1000. The process affords non-incumbent transmission developers an opportunity to participate in the regional planning and expansion of the PJM bulk electric system. By publishing a set of criteria violations and soliciting solutions from competing transmission developers, PJM and the FERC hope to encourage innovative, cost effective and timely solutions to the challenges of building and maintaining a highly reliable electric system. The Competitive Planner is developed for Transmission Owners and Developers who would like to participate in the PJM competitive planning process.

Who needs access?

- Anyone who would like to participate in PJM competitive planning process

How do you get access?

- Transmission owners and Developers need to be Pre-Qualified via the CEII process
• **Reason for Change**
  – A web based form or application for submitting this information would vastly improve the speed and accuracy of the process
  – Improved customer service to submitting entities
  – Near real-time tracking of submissions and immediate characterization of proposals

• **Tentative Key Dates**
  – Registration availability expected June 22, 2020
  – Production implementation expected July 1, 2020

• **Next Steps**
  – Continue to provide updates through the Tech Change Forum and Planning Committee
• The Beta Testing was implemented on May 6 - May 20.
• Volunteers provided feedback about the application by answering following feedback questions.
  – Does this application meet your expectations? If not, please explain why.
  – How do you compare this application to previous methods of submitting proposals such as an excel template and the Axway tool?
  – How would you rate your overall experience with this application?
  – What improvements would you like to see in the future?
Competitive Planner Registration Instructions

• The registration will be available on June 22
• Go to Competitive Planning Process page https://www.pjm.com/planning/competitive-planning-process.aspx
• Click on Request Access to Competitive Planner
• Access training user guide and completed proposal samples

**Production:** Sign In | Register  
**Train Environment:** Sign In | Register

**Available roles for Competitive Planner users**

<table>
<thead>
<tr>
<th>Roles</th>
<th>Description</th>
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<tbody>
<tr>
<td>Competitive Planner Read Only</td>
<td>Can only read existing proposals. Cannot start, edit or submit proposals.</td>
</tr>
<tr>
<td>Competitive Planner Read Write</td>
<td>Can start, edit or view proposals. Cannot submit proposals.</td>
</tr>
<tr>
<td>Competitive Planner Submitter</td>
<td>Everything Read Write role can do plus submit proposals.</td>
</tr>
<tr>
<td>SUMA accounts</td>
<td>Any combination of above three roles (one per company)</td>
</tr>
</tbody>
</table>
Product Details
Key Product Features

- Form based which in turn ensures more accurate data
- Improved customer service for submitting entities
- Eliminate manual, time consuming and error prone process
- Secure information flow from the end user to PJM
• V1 – 6/5/2020 – Original slides posted