



Schedule 9 & 10 Charge Details Report Update Options

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Market Settlements Subcommittee
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- PJM [presented](#) proposed Administrative Rate updates at September 22nd, MSS meeting.
- Updates effective January 1st, 2022
- Planned report changes:
 - Current – Schedule 9 & 10 Charge Details
 - Keep for the 2021 refunds only
 - Terminate in April 2022 after refunds are completed
 - Create new reports effective January 1st, 2022
 - Represent new methodology
 - Recognize 'new' 9-4 as 'old' 9-5
 - Change billing determinant for PJM Settlement
 - Report produced daily with usage but no charge dollars
 - Charge dollars will be monthly

- Initial feedback received for updated Schedule 9 & 10 report was to pivot report from horizontal EPT Hour Ending columns to vertical date fields.
- Because of updated monthly rate structure, daily report will only detail usage values while computed charges will be presented at a monthly level with total monthly usage and rate.
- Current ideas for daily usage report:
 - Vertical date columns with Trade Date granularity – no hourly values shown.
 - Details general usage value i.e. RT Load with Losses, FTR Bid Obligations, RT Generation and does not detail particular associated Schedule.
 - Does not detail PJM Settlement, Inc. Invoice count.

- New monthly report details total monthly usage, monthly rate, and calculated monthly charge.
- Monthly report will only be published at the end of billing cycle once total usage and monthly rate values are available; no preliminary postings throughout month.
- Current ideas for monthly charge report:
 - Vertical date columns with Month granularity.
 - Vertical Schedule column with vertical Usage, Rate, and Charge columns to detail each value with associated Schedule.
 - All schedules always populated even if usage and charge are zero for month.

- Please submit any additional feedback to mss@pjm.com or provided contact information on end slide.
- Follow PJM Stakeholder and FERC process for endorsement and Order.
- Continue discussions at November MSS with draft report documentation presented.

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