TO Planner (Non-Competitive baseline) User Guide

Date 12/1/2022

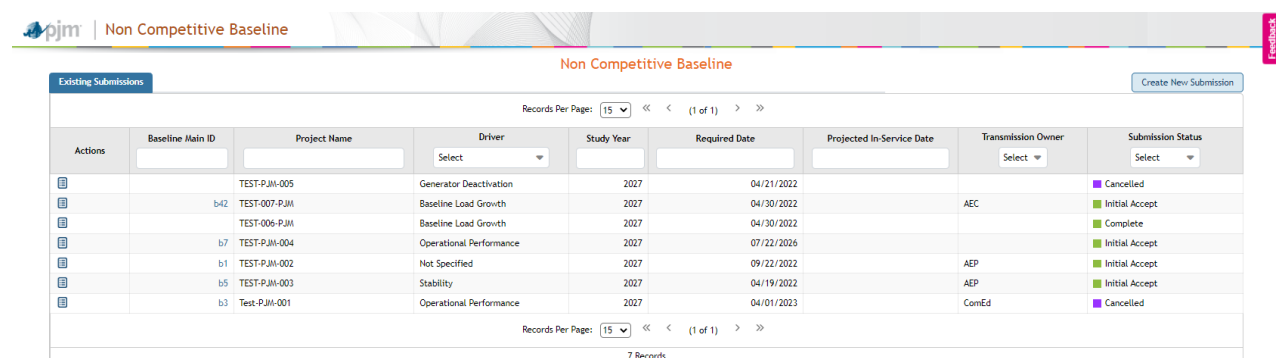This page is intentionally left blank.

Contents

Overview

The TO Planner (Non-Competitive baseline) was created to allow Transmissions Owners to submit non-competitive baseline projects to PJM through a web portal. Transmission Owners are able to track their submitted project status and interact with PJM transmission planning through the web portal.

Account Administration

Users must request access for the PJM.com TO Planner tool via the [Access Manager](#) page.

Homepage

The TO Planner homepage displays all of the projects that a Transmission Owner has entered. For the projects listed, it will display a Baseline Main ID if available, the Project Name, Driver, the Study Year, Required In-Service Date, the Projected In-Service Date, and the Submission Status. Under the Actions column, users are able to view /edit/remove/request to cancel the Submission. Depending on the status of the submission, different actions are allowed.


Creating a New Submission

Clicking on the "Create New Submission" button on the homepage brings the user to the Project Submission Form. The fields marked with a red (*) are required fields. Users can save the progress anytime during the process by click "Save as Draft". TOP will show saved information when the user log in next time. The General Information tab has to be saved (either "Save as Draft" or "Save & Validate") before the remaining tabs are open for completion. Note: The save status of each tab is shown on the upper right corner of the tab.

General Information

Going down the list in the General Information page, there are the following items.

1. Baseline ID: This is provided by the tool once the project has been initially accepted.

2. Project Name: This is the name of the project submitted by the Transmission Owner.

3. Problem Statement: A description of the problem/violation(s) that the baseline upgrade proposal is intended to resolve

4. Study Year: The year of the RTEP Case in which the project is identified.

5. Driver: The Type of study showing the need for baseline project.

6. Immediate Need: This will be validated by PJM.

7. TO Planner email: The email of the TO Planner who is responsible for the project planning study.

8. TO Modeler email: The email of the TO Modeler who is responsible for project MOD Submission.

9. Region: The region in which the Project is located (PJM South, PJM West, PJM MA).

10. Criteria Violation: Criteria Violation which resulted in creation of the baseline project. For example: Overload of A-B 138KV line; low voltage violation at 46kV buses A and B

11. Overlaps with existing supplemental projects: existing supplemental projects including needs/solutions. If Yes is selected, please enter the supplemental ID or Need(s) #

12. Alternatives: The alternative(s) including description and cost estimate (as applicable) that were examined when developing the baseline project. If there is none, please enter in N/A

13. Required In-Service Date: The required in-service date of the baseline project

14. Geographic Map: A geographic map showing the location of the baseline upgrade proposal including map legend and small locator map (see the sample below). If there is none, please check the "Not Applicable" box.

15. Bubble Diagram: A bubble diagram including diagram legend showing the baseline project. If there is none, please check the "Not Applicable" box.
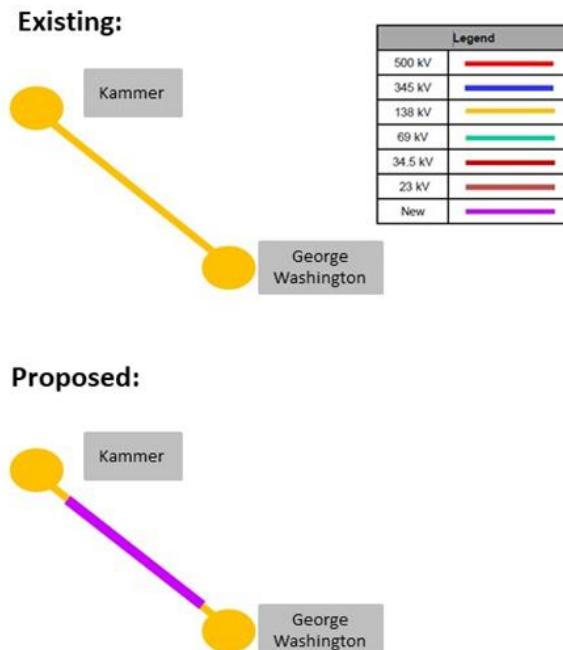
Users are then prompted on the bottom of the page to "Save as Draft" and "Save and Validate". "Save as Draft" will allow users to continue on with the submission form and fill out the rest of the data required. "Save and Validate" will confirm that the information provided is correct and is a required step in which will be discussed further in the "Review" tab.

Reliability Violations

Click the Existing Flowgates tab to select flowgate(s) that the proposed project solves or mitigates.

If the proposed project also address additional flowgate(s) which are caused by part of the project, PJM requires TOs to list the flowgate(s) too. Click the New Flowgates tab to add the flowgate(s). This information is to be manually entered by the user using the flowgate template that is in the tool.

Please note, both the Existing Flowgates and the New Flowgates tabs (even no new flowgate is addressed) need to be "Saved and Validated" before the project can be submitted.
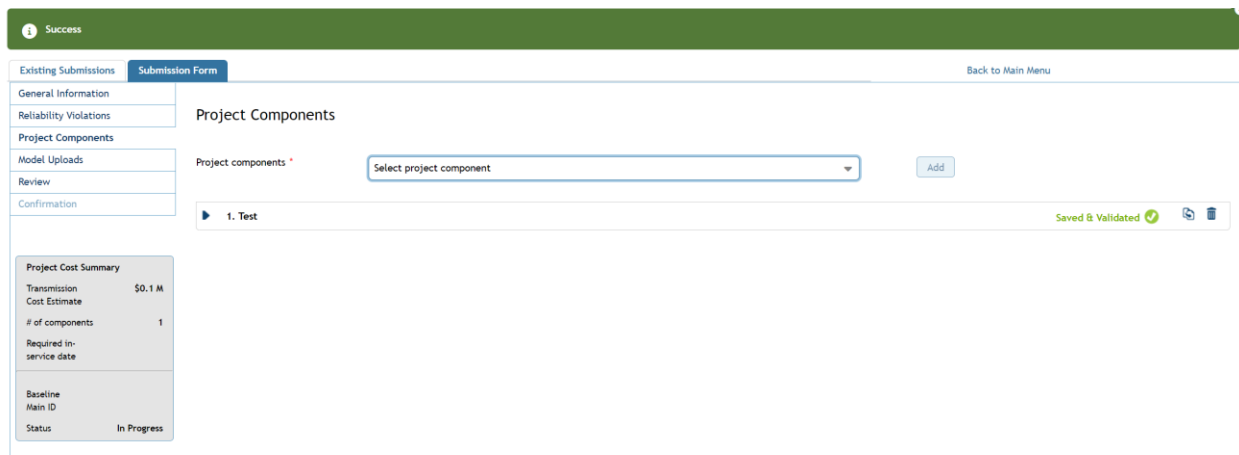
Project Components

There are three types of components:

1. Transmission Line Component

2. Substation Component

3. Generator Component (NOTE: TOs must obtain concurrence from the related generator owner on the scope of the component before submitting it to PJM)

A project can have multiple components (including multiple same type of components).
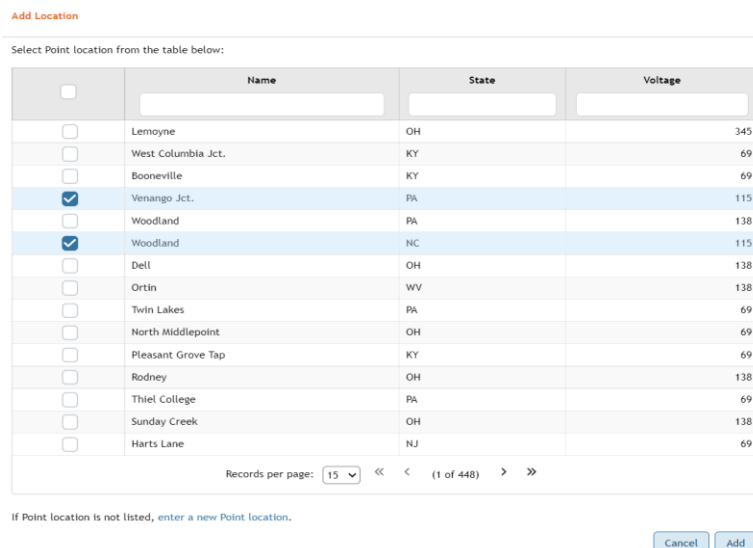

Please note, each of these have their own requirements to fill out and must be "Saved and Validated" at the end of the submission. If you have multiple components, you can add a separate entry by clicking the drop down menu and select "Add".

Locations

When adding a new component, users will be required to provide the location. For Transmission Line Components, a minimum of Point A and Point B are required. For multi section line, up to 10 locations can be selected. To select points, users can click the box on the left hand side to select the desired location. If more than two locations are selected, the sequence of selection should follows the line arrangement. For example, for line A-B-D-C, the selection sequence should be 1-A, 2-B, 3-D and 4-C.

If the location is a GREENFIELD (doesn't exist in the location list), then users can select the "enter a new Point Location" and provide the required information that is seen below.

Users can see the added point at the end of the list of available points. Points added in the tool can be used for all components that are added. Please note, once the point is added to the list, it can't be removed unless the component is deleted before the submission. However, it can be deselected. After the project is submitted, Users cannot remove the added point(s) anymore.

Model Uploads

In this section, Users shall upload the Load Flow Files, Contingency Files, Short Circuit Files, Stability Study Files, One Line Diagrams, or any additional materials. If certain files that are required but not applicable, please select the "Not Applicable" box. Make sure to "Save and Validate" when completed.

1. Load Flow : The IDV file in the corresponding PSS/E Version
2. Contingency File: New, Removed, and or Updated Contingency definitions
3. Short Circuit: Short Circuit CHF Files
4. Stability Study: Dyr file, or other files needed for stability study
5. One-Line Diagram: One – Line Diagram of the Model
6. Additional Materials: Please include any other files for analysis in this section

Review

The Review tab has all of the prior information that the user entered into the tool. Each section will have a header in the top right corner to note if it was "Saved & Validated". Users will not be able to check the box on the bottom of the page until they have made sure that each section has been "Saved & Validated".
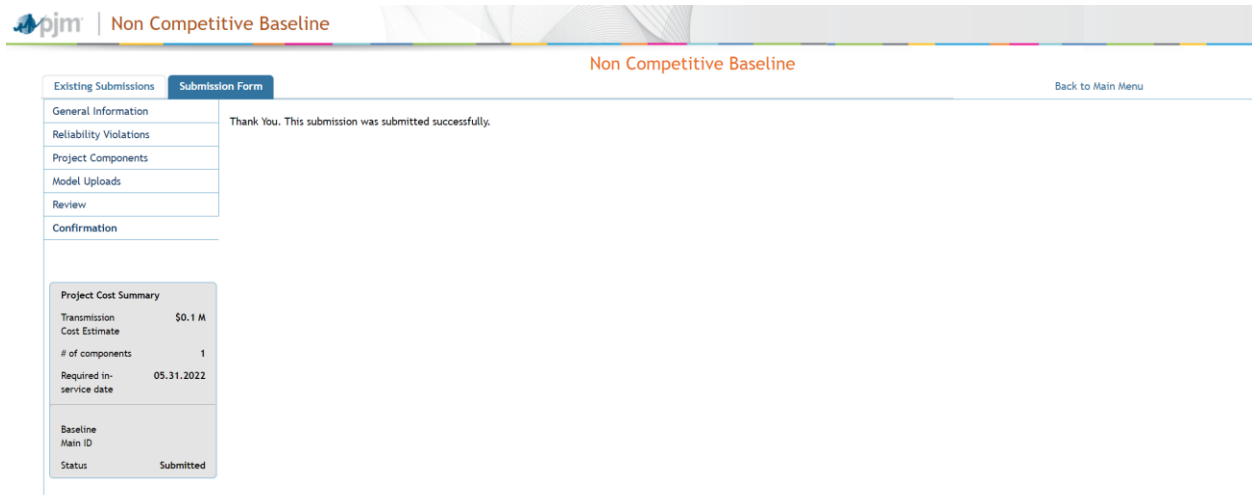
Once the user submits the project, they will see a confirmation banner appear. Please note, once a project is submitted, it can no longer be edited unless PJM marks the project deficient.

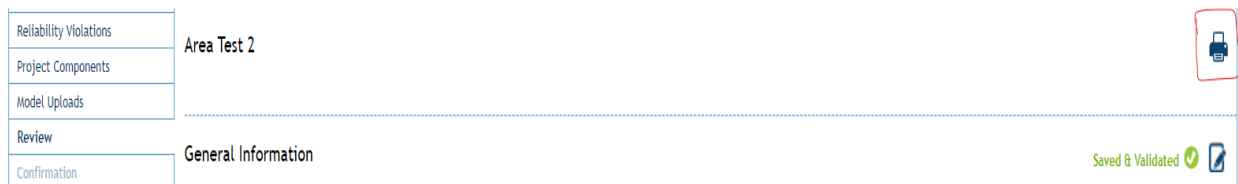Users are able to edit a project that have not yet been submitted by clicking on the tool listed in the Actions Column. Once the project is submitted, it will be locked for editing unless PJM marks it deficient.

Users can also generate a PDF of the Proposal once it has been submitted.

Cancel a Project Submission

TOs can initiate the cancellation of a submitted project by sending a cancellation request. By clicking either the icon on the "Actions" tab in the homepage. PJM will review the request and cancel the submittal.

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Existing Submissions

Actions	Baseline Main ID	Project Name
📋⊘		PJM-TST

Users will then be prompted with a request form for the Cancellation of the submission. Generally, TOs should state the reason(s) for the cancellation in the pop up TO comments field. Cancellation of a project submission requires PJM confirmation.

Cancel Project Request ✕

⚠ If you cancel this project, all project information will be erased. This action requires PJM confirmation. Would you like to send cancelation request to PJM?
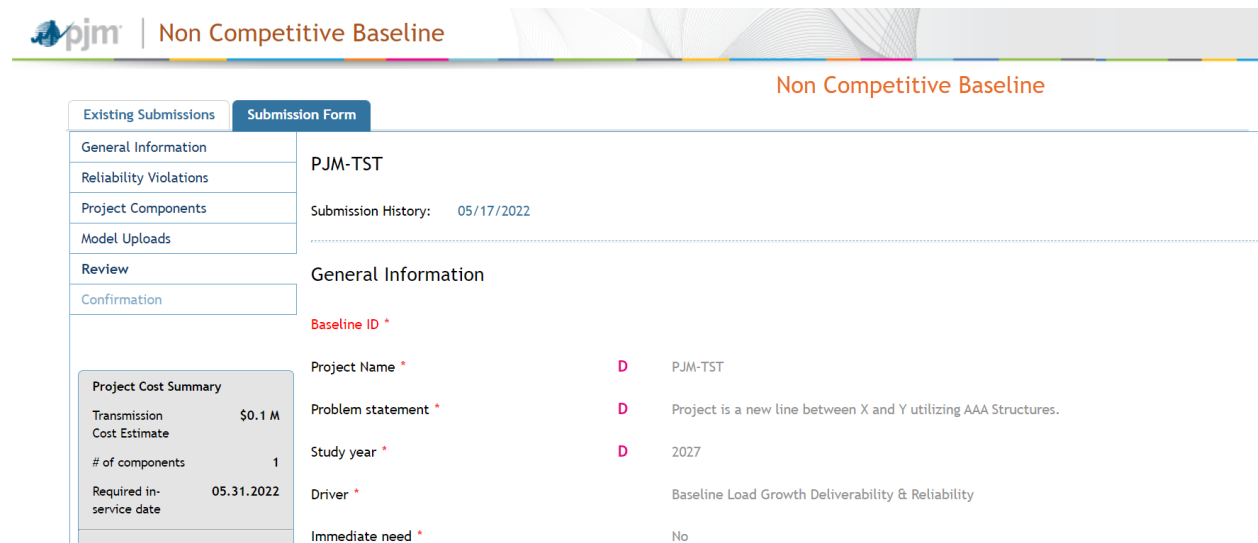
TO comments

[Submit] [Cancel]

Deficiencies

Once a project is submitted, PJM will review all the information submitted. If there is any deficiency in certain field(s), PJM will mark these field(s) of the project Deficient. In some situations, PJM could mark the whole project deficient. In the event of this, Users will receive an email stating that their project has been marked deficient and needs to be reviewed and re-submitted.

To view the deficient fields, open the project and navigate to the "Review" tab. There you will see blue "**D**" marks indicating which fields need to be updated.

Users are only able to edit the fields that are marked as deficient. Users can navigate to the tab that has the deficiency and make the necessary changes.

Users can also select the "View Deficient Fields Only" box to see only what PJM has marked as deficient in their proposal.

All updates made are tracked and will be reflected in yellow on the final review page after they are "Saved & Validated".
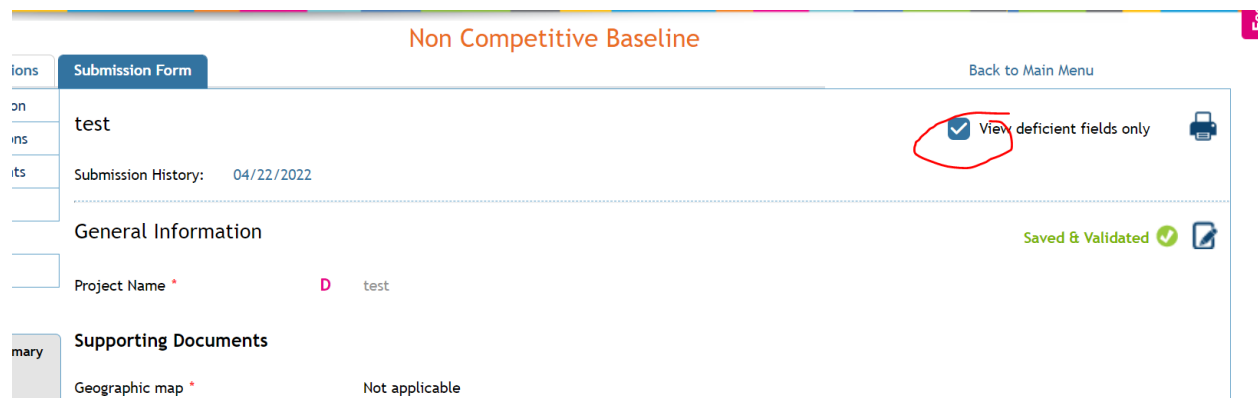
On the left hand of the screen, there is a window that summarizes components of the proposal including the "Transmission Cost Estimate", the "Number of Components", and the "Required In-Service Date". Once the project is accepted by PJM, a Baseline Main ID will be assigned. The "Status" is status of the proposal which is also reflected on the "Existing Submissions" in the "Submission Status" column.