

# ***Midwest ISO and PJM***



## ***Joint Operating Agreement (JOA) Update***

**Joint Stakeholder Meeting  
November 14, 2008**

# JOA Update – Introduction

- Joint Operating Agreement
  - Main Document
    - Initially filed in December 2003
  - Congestion Management Process
    - Initially filed in April 2004
    - Updated in 2007
    - Revision filed in October 2007
  - Interregional Coordination Process
    - Initially filed in December 2004
    - Updated in 2008
    - Revisions filed in June 2008

# JOA Update – Driving Factors

- Midwest ISO/PJM both operating markets
  - Removed references to Phases
  - Data exchanges
- Lessons Learned
- Added the Congestion Management Process
- Added the Interregional Coordination Process
- NERC as the Energy Reliability Organization (ERO)
  - Policies vs. Standards
  - Functional Model/Terminology
- NAESB Standards Approved by FERC
- FERC Order 890
- Consistency changes

# JOA Update – Summary of Changes

Article I – Recitals	<ul style="list-style-type: none"><li>➤ Minor consistency changes</li></ul>
Article II – Abbreviations, Acronyms and Definitions	<ul style="list-style-type: none"><li>➤ Added a number of abbreviations that were not previously included but used in the document</li><li>➤ Removed abbreviations not used</li><li>➤ Added a number of new definitions to be consistent with NERC terminology</li><li>➤ Removed terms no longer used</li></ul>
Article III – Overview of Coordination and Information Exchange	<ul style="list-style-type: none"><li>➤ Removed references to the JOA phases</li><li>➤ Removed references to Coordination and Analysis of Pathway from Commonwealth Edison to PJM</li></ul>
Article IV – Exchange of Information and Data	<ul style="list-style-type: none"><li>➤ Removed references to phases</li><li>➤ Changed terminology (e.g. Control Areas/Balancing Authority Areas)</li><li>➤ Changed TTC to TFC</li><li>➤ Removed data exchanges not needed</li><li>➤ Minor consistency changes</li></ul>

# JOA Update – Summary of Changes

Article V – AFC Calculations	<ul style="list-style-type: none"><li>➤ Changed references of TTC/ATC/AFC to AFC and/or TFC where appropriate</li><li>➤ Expanded the scope of facilities considered in the AFC process</li><li>➤ Added detail in Reservations section</li><li>➤ Changed Available Flowgate Rating to Available Flowgate Capability</li></ul>
Article VI – Reciprocal Coordination of Flowgates	<ul style="list-style-type: none"><li>➤ Moved definitions to Article II</li><li>➤ Removed references to phases</li><li>➤ Updated to align with the Congestion Management Process</li></ul>
Article VII –Coordination of Outages	<ul style="list-style-type: none"><li>➤ Documented that an interregional outage coordination process has been implemented</li><li>➤ Updated frequency for when Outage Coordination discussions shall occur</li></ul>
Article VII – Principles Concerning Joint Operations in Emergencies	<ul style="list-style-type: none"><li>➤ Changed terms to align with NERC terminology</li><li>➤ Removed references to operating guides that are no longer in use</li></ul>

# JOA Update – Summary of Changes

Article IX – Coordinated Regional Transmission Expansion Planning	<ul style="list-style-type: none"><li>➤ Updated the Joint RTO Planning Committee so that it can include entities beyond Midwest ISO and PJM (e.g. SPP and TVA)</li><li>➤ Updated planning data exchange</li><li>➤ Added clarification on studies for interconnection requests and long-term firm transmission service</li></ul>
Article X – Joint Checkout Procedures	<ul style="list-style-type: none"><li>➤ Changed terms to align with NERC terminology</li><li>➤ Added clarification for checkouts by telephone</li><li>➤ Updated after the fact checkouts</li></ul>
Article XI – Additional Coordination Provisions	<ul style="list-style-type: none"><li>➤ Removed reference to Commonwealth Edison and AEP integration</li><li>➤ Removed detail for market to market coordination, which has been more fully defined in Interregional Coordination Process</li><li>➤ Incorporated summary information for market-to-market coordination and referenced the Interregional Coordination Process for the detail</li><li>➤ Updated to include Auction Revenue Rights</li></ul>

# JOA Update – Summary of Changes

Article XII –Effective Date	➤ Removed the references that Phase 1 could not start until hold harmless issues were addressed
Article XIII – Joint Resolution of Market Monitor Issues	➤ No changes
Article XIV – Cooperation and Dispute Resolution Procedures	➤ Removed references to phases
Article XV – Relationship of the Parties	➤ No changes
Article XVI – Accounting and Allocation of Costs of Joint Operations	➤ No changes
Article XVII – Retained Rights of Parties	➤ No changes

# JOA Update – Summary of Changes

Article XVIII – Additional Provisions	<ul style="list-style-type: none"><li>➤ Added Confidential Data Exchange from Article IV</li><li>➤ Applied consistency changes</li><li>➤ Updated Midwest ISO address information</li></ul>
Article XIX – Voltage and Reactive Power	<ul style="list-style-type: none"><li>➤ Changed terms to align with NERC terminology</li><li>➤ Updated frequency of meetings to align with seasonal reviews</li><li>➤ Added clarification to specific voltage schedule coordination actions</li></ul>
Attachment 1 – PJM Analysis for Pathway Segments	<ul style="list-style-type: none"><li>➤ Deleted Attachment 1 PJM Analysis for Pathway Segments</li><li>➤ Marked Attachment as reserved for future use</li></ul>
Attachment 5 – Emergency Energy Transactions	<ul style="list-style-type: none"><li>➤ Consistency changes</li></ul>



# JOA Update – Redline JOA

- Draft redline JOA can be found under Additional Documentation for today's meeting at:

<http://www.jointandcommon.com/working-groups/joint-and-common/joint-and-common-wg.html>

- Questions/Comments