

ISO Rules

Part 500 Facilities

Division 501 General

Section 501.3 Abbreviated Needs Approval Process



Applicability

1 Section 501.3 applies to:

- (a) the **ISO**.

Requirements

Assessment

2 The **ISO** must use the following criteria to determine the eligibility of a **system access service** connection or a **transmission facility** project for the abbreviated needs approval process:

- (a) a connection that responds to a request for **system access service**, where:
 - (i) if the request for **system access service** is for a **generating unit** or **aggregated generating facility**, the **maximum capability** of the **generating unit** or **aggregated generating facility** is less than 45 MW;
 - (ii) if the request for **system access service** is for load, the load has contracted for less than 45 MW of Rate DTS in accordance with the **ISO tariff**;
 - (iii) the connection to the **transmission system** can be provided for through substation additions, rebuilds and reconfigurations, or through the salvage or decommissioning of **transmission facilities**, all within the existing substation fenced area;
 - (iv) the costs classified as system-related in accordance with the **ISO tariff** are estimated to have a total project cost of less than \$2,000,000 in the **service proposal**; and
 - (v) the studies used to assess the connection do not identify any **transmission constraints**, including constraints causing curtailments, under Category A or Category B conditions as described in the Alberta Reliability Standards; or
- (b) a **transmission facility** project that does not respond to a request for **system access service** and for which the costs classified as system-related in accordance with the **ISO tariff** are estimated to have a total project cost of less than \$2,000,000 in the **service proposal**.

Approval

3 The **ISO** must, where applicable, when considering whether to approve a **system access service** connection or **transmission facility** project referred to in subsection 2 under the abbreviated needs approval process:

- (a) for connections that respond to a request for **system access service**:

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- (i) review the last five-year recorded and 10-year forecast summer and winter peak substation loads for the points of delivery identified in the planning report submitted to the **ISO** by the **legal owner** of the distribution facility to support the connection; and
- (ii) assess **transmission system** performance prior to connection, and **transmission system** impact following connection, by way of connection or other studies including, as applicable, load flow studies (Category A or Category B conditions as described in the Alberta Reliability Standards), reactive studies, stability studies and other studies in accordance with the **ISO's** planning criteria.

(b) perform a comparison of the options considered to connect or serve the applied-for **system access service** connection or **transmission facility** project, including, as applicable:

- (i) connection configurations;
- (ii) capital costs;
- (iii) system impacts; and
- (iv) environmental and other considerations.

4 The **ISO** may, subject to subsection 3:

- (a) approve a **system access service** connection or **transmission facility** project described in subsection 2 under the abbreviated needs approval process; or
- (b) refuse to approve a **system access service** connection or **transmission facility** project described in subsection 2 under the abbreviated needs approval process.

5 The **ISO** must, where it approves a **system access service** connection that responds to a request for **system access service** under the abbreviated needs approval process:

- (a) provide an approval letter to the **market participant** that has requested **system access service**, certifying that the **ISO** has approved the **system access service** connection; and
- (b) provide the **legal owner** of a **transmission facility** who is eligible to apply for construction or operation of a **transmission facility** in the applicable geographic area (as determined under section 24(1) of the *Transmission Regulation*) with a copy of the approval letter described in subsection 5(a).

6 The **ISO** must, where it approves a **transmission facility** project that does not respond to a request for **system access service** under the abbreviated needs approval process, provide the **legal owner** of a **transmission facility** who is eligible to apply for the construction or operation of a **transmission facility** in the applicable geographic area (as determined under section 24(1) of

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the *Transmission Regulation*) with an approval letter, certifying that the **ISO** has approved the **transmission facility** project.

Revision History

Date	Description
2015-07-31	Initial release.