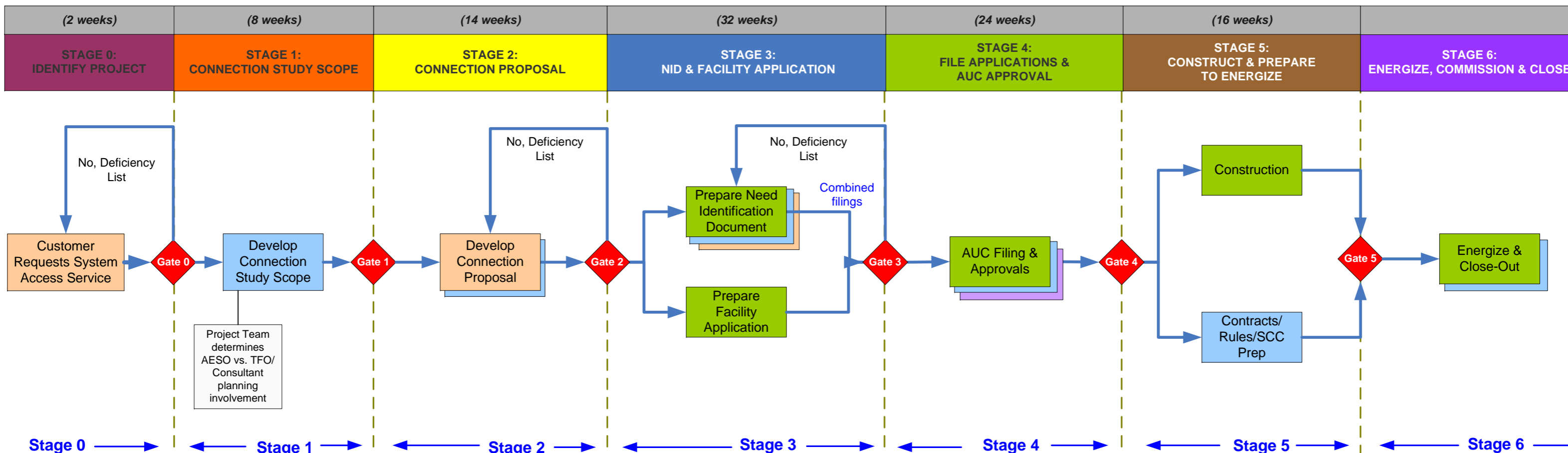


# CONNECTION PROCESS OVERVIEW

(Beta Test Target Timelines)



**Key Activities:**

- Customer submits SAS Request to AESO
- AESO reviews SAS Request for completeness
- Customer resolves any data deficiencies if required
- Project is created

**Gate 0 Completion Requirements:**

- SAS Request is complete

**Key Activities:**

- Project kick off
- Complete Connection Plan
- Complete Connection Study Scope
- Identify AESO/TFO/ Consultant involvement in connection studies and Connection Proposal

**Gate 1 Completion Requirements:**

- Customer submits Stage 1 Project Data Update Package

- Connection Plan signed by all parties
- Connection Study Scope signed by all parties.
- Stage 1 Project Data Update Package is complete
- Non-Disclosure Agreement in place if Consultant will perform studies
- Customer is responsible for costs associated with preparation of the Connection Proposal if not completed by the AESO

**Key Activities:**

- Connection studies completed
- Customer completes or accepts Connection Proposal
- AESO completes Stage 2 CCD
- Customer submits Stage 2 Project Data Update Package (includes specific machine data for dynamic studies)
- Customer enters into an agreement for Stage 3 costs with incumbent TFO

**Gate 2 Completion Requirements:**

- AESO accepts Connection Proposal (or Customer accepts if AESO completes)
- Stage 2 Project Data Update Package is complete
- Customer has met security requirements for Stage 3 costs related to preparation of the NID and/or FA.

**Key Activities:**

- Confirm Connection Proposal is still valid
- AESO completes Functional Specification
- AESO completes NID including Participant Involvement Program
- TFO completes PPS & FA
- Generators file Generator Application with AUC
- Customer submits Stage 3 Project Data Update Package
- Customer enters into an agreement for Stage 4 costs with incumbent TFO

**Gate 3 Completion Requirements:**

- Customer issues Letter of Support for AESO to file NID and TFO to file FA
- Generators have filed Generator Facility Application with AUC
- Stage 3 Project Data Update Package is complete
- Customer has met AESO security requirements for Stage 4 costs incurred from filing of NID/FA to when AUC issues Permit & Licence to TFO

**Key Activities:**

- NID and FA filed with AUC
- AUC decision
- Customer enters into an agreement for Stage 5 costs with incumbent TFO
- AESO issues invoice for Generator System Contribution (generators only)

**Gate 4 Completion Requirements:**

- Customer has met AESO security requirements for Stage 5 costs – load customers pay Customer Contribution and generators pay Customer Contribution and Generator System Contribution in cash within 90 days of AUC issuing TFO Permit & Licence

**Key Activities:**

- Construction of transmission facilities
- Customer and AESO sign the System Access Service (SAS) Agreement
- If required, AESO operating procedures are created or amended
- Customer submits Stage 5 Project Data Update Package (data required for energization)

**Gate 5 Completion Requirements:**

- Customer signs SAS Agreement 6 weeks prior to energization
- Stage 5 Project Data Update Package is complete

**Key Activities:**

- Energization Checklist issued
- Energize transmission facilities
- Commissioning period where applicable
- Commissioning Certificate issued by AESO for generators
- TFOs finalize project costs
- AESO updates final CCD
- Customer and TFO true up final costs
- AESO closes project

**Gate 6 Completion Requirements:**

- AESO Project Closure Checklist completed.

**Legend**  
 AESO = Alberta Electric System Operator  
 TFO = Transmission Facility Owner  
 CCA = Construction Commitment Agreement  
 CCD = Customer Contribution Decision  
 NID = Need Identification Document  
 FA = Facility Application  
 AUC = Alberta Utilities Commission  
 SAS = System Access Service  
 DTS = Demand Transmission Service  
 STS = Supply Transmission Service  
 PPS = Proposal to Provide Service

**Lead:**  
 AESO  
 TFO  
 Customer  
 AUC