

1. Purpose

The purpose of this **reliability standard** is to improve communications for the issuance of instructions and **directives** with predefined communications protocols to reduce the possibility of miscommunication that could lead to action or inaction harmful to the **reliability** of the **bulk electric system**.

2. Applicability

This **reliability standard** applies to:

- (a) the **operator** of a **generating unit** that is directly connected to the **transmission system** or to **transmission facilities** within the City of Medicine Hat;
- (b) the **operator** of an **aggregated generating facility** that is directly connected to the **transmission system** or to **transmission facilities** within the City of Medicine Hat;
- (c) the **operator** of a **transmission facility**; and
- (d) the **ISO**.

3. Requirements

R1 The **ISO** and the **operator** of a **transmission facility** must have documented communication protocols for its operating personnel that issue or receive instructions or **directives**, which protocols must, at a minimum:

- R1.1** require its operating personnel that issue or receive an oral or written instruction or **directive** to use the English language;
- R1.2** require its operating personnel that issue an oral two-party, person-to-person instruction or **directive** to take one of the following actions:
- (a) confirm the receiver's response if the repeated information is correct;
 - (b) reissue the instruction or **directive** if the repeated information is incorrect or if requested by the receiver; or
 - (c) take an alternative action if a response is not received or if the instruction or **directive** was not understood by the receiver;
- R1.3** require its operating personnel that receive an oral two-party, person-to-person instruction or **directive** to take one of the following actions:
- (a) repeat, not necessarily verbatim, the instruction or **directive** and receive confirmation from the issuer that the response was correct; or
 - (b) request that the issuer reissue the instruction or **directive**;
- R1.4** require its operating personnel that issue a written or oral single-party to multiple-party burst instruction or **directive** to confirm or verify that the instruction or **directive** was received by at least one receiver;
- R1.5** specify the instances that require time identification when issuing an oral or written instruction or **directive** and the format for that time identification; and
- R1.6** specify the nomenclature for **system elements** that interface between **operators** of **transmission facilities** when issuing an oral or written instruction or **directive**.

- R2** The **ISO** and the **operator** of a **transmission facility** must conduct initial training for each of its operating personnel responsible for the realtime operation of the **interconnected electric system** on the documented communications protocols developed in accordance with requirement R1 prior to that individual **operator** issuing or receiving an oral two-party, person-to-person instruction or **directive**.
- R3** Each **operator** of a **generating unit**, and **operator** of an **aggregated generating facility** must, for each of its operating personnel who can receive an oral two-party, person-to-person instruction or **directive** prior to that individual **operator** receiving an oral two-party, person-to-person instruction or **directive**, conduct initial training to train them to either:
- (a) repeat, not necessarily verbatim, the instruction or **directive** and receive confirmation from the issuer that the response was correct; or
 - (b) request that the issuer reissue the instruction or **directive**.
- R4** The **ISO** and the **operator** of a **transmission facility** must at least once every 12 months:
- R4.1** assess adherence to the documented communication protocols in requirement R1 by its operating personnel that issue or receive instructions or **directives**, provide feedback to those operating personnel, and take corrective action, as deemed appropriate by the entity, to address deviations from the documented protocols; and
- R4.2** assess the effectiveness of its documented communications protocols in requirement R1 for its operating personnel that issue or receive instructions or **directives**, and modify its documented communication protocols, as necessary.
- R5** The **ISO** and the **operator** of a **transmission facility** that issues an oral two-party, person-to-person **directive** or instruction during an energy emergency alert, excluding written or oral single-party to multiple-party burst instructions or **directives**, must:
- (a) confirm the receiver's response, if the repeated information is correct;
 - (b) reissue the instruction or **directive**, if the repeated information is incorrect or if requested by the receiver; or
 - (c) take an alternative action, if a response is not received or if the instruction or **directive** was not understood by the receiver.
- R6** Each **operator** of a **generating unit**, **operator** of an **aggregated generating facility** and **operator** of **transmission facility** that receives an oral two-party, person-to-person **directive** or instruction during an energy emergency alert, excluding written or oral single-party to multiple-party burst instructions or **directives**, must either:
- (a) repeat, not necessarily verbatim, the instruction or directive and receive confirmation from the issuer that the response was correct, or
 - (b) request that the issuer reissue the instruction or **directive**.
- R7** The **ISO** and the **operator** of a **transmission facility** that issues a written or oral single-party to multiple-party burst instruction or **directive** during an emergency must confirm or verify that the instruction or **directive** was received by at least one receiver.

4. Measures

The following measures correspond to the requirements identified in section 3 of this **reliability standard**. For example, MR1 is the measure for requirement R1.

- MR1** Evidence of having documented communication protocols for operating personnel that issue or receive instructions or **directives** as required in requirement R1 exists. Evidence may include documented communication protocols, or other equivalent evidence.
- MR2** Evidence of conducting initial training for each of its operating personnel for the real-time operation of the **interconnected electric system** as required in requirement R2 exists. Evidence may include initial training records, such as dated class rosters, training certificates, lesson plans, or course materials, or other equivalent evidence.
- MR3** Evidence of conducting initial training for operating personnel who can receive an oral two-party, person-to-person instruction or **directive** as required in requirement R3 exists. Evidence may include initial training records, such as dated class rosters, training certificates, lesson plans, or course materials, or other equivalent evidence.
- MR4** Evidence of assessing the adherence to the documented communication protocols in requirement R1 as required in requirement R4 exists. Evidence may include documented assessments, logs or other evidence of feedback, corrective actions taken, modified documented communication protocols, or other equivalent evidence.
- MR5** Evidence of confirming receiver's response, reissuing the instruction or **directive**, or taking an alternative action as required in requirement R5 exists. Evidence may include dated and time-stamped voice recordings, dated and time-stamped transcripts of voice recordings, dated operator logs, or other equivalent evidence.
- MR6** Evidence of repeating the instruction or **directive**, or requesting that the issuer reissue the instruction or **directive** as required in requirement R6 exists. Evidence may include dated and time-stamped voice recordings, dated and time-stamped transcripts of voice recordings, dated operator logs, or other equivalent evidence.
- MR7** Evidence of confirming or verifying that the instruction or **directive** was received by at least one receiver as required in requirement R7 exists. Evidence may include dated and time-stamped voice recordings, dated and time-stamped transcripts of voice recordings, dated operator logs, or other equivalent evidence.

Revision History

Date	Description
xxxx-xx-xx	Initial release.