

# ISO Rules

## Part 300 System Reliability and Operations

### Division 306 Outages and Disturbances

#### Section 306.4 Transmission Planned Outage Reporting and Coordination



Draft Version  
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#### Applicability

- 1 Section 306.4 applies to:
- (a) the **legal owner** of a **transmission facility**;
  - (b) the **legal owner** of **generating unit** connected to a **transmission facility**;
  - (c) the **legal owner** of an **aggregated generating facility**;
  - (d) the **legal owner** of an **electric distribution facility**;
  - (e) the **legal owner** of an **intertie**;
  - (f) the **legal owner** of load directly connected to the **transmission system**; and
  - (g) the **ISO**;

when managing the reporting and coordination of **planned outages**, including live line work and recloser block situations, for **transmission facilities**.

#### Requirements

##### General

- 2 The **legal owner** of a **transmission facility** must, prior to the occurrence of a **planned outage**, submit to the **ISO** a **planned outage** request for approval by submitting the information specified in this section 306.4 and according to the timelines set out below.

##### Planned Outage Schedule and Requests

3(1) The **legal owner** of a **transmission facility** must submit to the **ISO**, by the first **day** of every **month**, a schedule of significant **planned outages** that are planned to occur within the next 48 **months**.

(2) The **legal owner** of a **transmission facility** must submit to the **ISO** a significant **planned outage** request as soon as possible, and not less than thirty (30) **days** before the start of the **operating week** in which the significant **planned outage** is intended to occur.

(3) The **legal owner** of a **transmission facility** must, in its schedule of significant **planned outages** and in its significant **planned outage** requests, include a **planned outage** that meets any one (1) or more of the following criteria:

- (a) it affects a **transmission facility** operating at two hundred and forty (240) kV or greater;
- (b) it affects an **intertie**;
- (c) it affects a **system element** connecting facilities owned by two (2) or more different **legal owners** of **transmission facilities**;
- (d) it affects a **system element** that connects a **generating unit** or an **aggregated generating facility** to the **interconnected electric system**;
- (e) it requires the **ISO** to issue a **dispatch** or **directive** for generation in order to facilitate the **planned outage**;

# ISO Rules

## Part 300 System Reliability and Operations

### Division 306 Outages and Disturbances

#### Section 306.4 Transmission Planned Outage Reporting and Coordination



- (f) it affects a cutplane limit;
- (g) it limits or reduces the operability of a synchronous condenser, static VAR compensator, static compensator or other similar dynamic device; or
- (h) it affects high voltage direct current facilities.

**(4)** The **legal owner** of a **transmission facility** must submit to the **ISO** a non-significant **planned outage** request no later than 12:00 noon on Tuesday in the week before the **operating week** in which the non-significant **planned outage** is intended to occur.

**(5)** The **legal owner** of a **transmission facility** must, on the Tuesday before each **operating week** and prior to 12:00 noon, resubmit to the **ISO** all **planned outage** requests that the **legal owner** intends to conduct in the following **operating week**.

#### Changes to Requests and Cancellations

**4(1)** The **legal owner** of a **transmission facility** must submit to the **ISO** any changes to a previously submitted **planned outage** request, including cancellations, as soon as possible, and no later than 10:00 am on the **business day** before the first **day** impacted by the intended change to the previously submitted **planned outage** request.

**(2)** The **legal owner** of a **transmission facility** must, if it is unable to comply with subsection 4(1), submit to the **ISO** a cancellation of a **planned outage** request as soon as possible after the deadline set out in subsection 4(1), and provide a reason as to why it was unable to submit the cancellation by that deadline.

#### Outage Pre-Work and Information

**5(1)** The **legal owner** of a **transmission facility** must, prior to submitting to the **ISO** any **planned outage** request or a change to a previously submitted **planned outage** request:

- (a) coordinate the **planned outage** with other affected **legal owners**;
- (b) perform a **contingency** assessment of the **planned outage**, considering conditions throughout the duration of the **planned outage**, and develop plans to mitigate any concerns identified; and
- (c) determine the **planned outage** does not conflict with any other **planned outage**.

**(2)** The **legal owner** of a **transmission facility** must, as part of any **planned outage** request, provide **planned outage** information to the **ISO** in the form the **ISO** specifies, including the following:

- (a) the **transmission facility** being taken out of service;
- (b) dates and times, indicating the start of switching to isolate a facility and the end of switching to return the facility to service;
- (c) nature of work and any related **system elements** that will be affected;
- (d) details of the **contingency** assessment and any mitigation plans;
- (e) confirmation of coordination with all affected **legal owners**;
- (f) isolation points energized at greater than 25 kV; and
- (g) time to restore the **transmission facility** in an **emergency**.

# ISO Rules

## Part 300 System Reliability and Operations

### Division 306 Outages and Disturbances

#### Section 306.4 Transmission Planned Outage Reporting and Coordination



#### ISO Assessments

**6(1)** The **ISO** must, no later than the start of the **operating week** in which the **planned outage** is to occur, assess:

- (a) in the case of a significant **planned outage**:
  - (i) a **planned outage** request submitted prior to ninety (90) **days** before the start of the **operating week** in which the **planned outage** is to occur; and
  - (ii) a change to a **planned outage** request, previously submitted pursuant to subsection 6(1)(a)(i), that is submitted prior to thirty (30) days before the start of the **operating week** in which the change is to occur; and
- (b) in the case of a non-significant **planned outage**, a **planned outage** request, and any change to such request, that is submitted prior to 12:00 noon on Tuesday in the week before the **operating week** in which the **planned outage** or the change, as applicable, is to occur.

**(2)** The **ISO** may assess a change to a **planned outage** request that is submitted in accordance with subsection 4, but that is submitted later than the timelines specified in subsection 6(1).

**(3)** The **ISO** must, if it assesses a **planned outage** request or any change to such request, do so by taking into account:

- (a) the **reliability** of the **interconnected electric system**;
- (b) potential impacts to **market participants**;
- (c) coordination of the **planned outage** with other affected **legal owners**; and
- (d) coordination of the **planned outage** with other anticipated conditions on the **interconnected electric system**.

#### ISO Approvals

**7(1)** The **ISO** must approve a **planned outage** request or any changes to such request, excluding cancellations, if the **ISO**:

- (a) assesses the **planned outage** request, or any change to such request, as set out in subsection 6; and
- (b) determines that the **planned outage** can be conducted without adversely affecting the **reliability** of the system or the fair, efficient and openly competitive operation of the market.

**(2)** The **ISO** must, if it approves a **planned outage** request or any change to such request, communicate such approval via an approved outage report posted on the AESO website.

**(3)** The **ISO** must approve a **planned outage** request and any change to such request in order for the **planned outage** to proceed.

**(4)** The **ISO** may, based on real time **reliability** requirements of the **interconnected electric system** and necessary **ISO** operational flexibility, cancel any **planned outage** it has already approved under subsection 7(1) by providing written or verbal notice to the **legal owner** of the **transmission facility**.

# ISO Rules

## Part 300 System Reliability and Operations

### Division 306 Outages and Disturbances

#### Section 306.4 Transmission Planned Outage Reporting and Coordination



#### Real Time ISO Approval

- 8(1)** The **legal owner** of a **transmission facility** must, in relation to any **planned outage**, obtain real-time approval from the **ISO** prior to switching transmission equipment out of service.
- (2)** The **legal owner** of a **transmission facility** must, in relation to any **planned outage**, obtain real-time approval from the **ISO** prior to energization of equipment after completion of an outage.

#### Coordination

**9** The **legal owner** of a **generating unit**, the **legal owner** of an **aggregated generating facility**, the **legal owner** of an **electric distribution system** and the **legal owner** of load must, on a reasonable efforts basis, coordinate with the affected **legal owners** regarding any **planned outages**.

#### Provision of Outage Information by the ISO

- 10(1)** The **ISO** must publish on the AESO website a list of significant **planned outages** that are to occur in the period beginning in the **operating week** after the upcoming **operating week** and ending 48 **months** later.
- (2)** The **ISO** must publish on the AESO website a list of all **planned outages** it has approved to occur during the remaining **days** of the current **operating week** and all **days** of the following **operating week**, and must use reasonable efforts to do so by 18:00 (6:00 pm) each Wednesday.
- (3)** The **ISO** must document details of its assessments of the approved **planned outages** noted on the list referred to in subsection 10(2) in a report commonly known as the coordination plan.
- (4)** The **ISO** must not include details of generation **dispatches**, generation **directives** or generation outage schedules in the coordination plan.
- (5)** The **ISO** must email the coordination plan to each **legal owner** of a **transmission facility** and must use reasonable efforts to do so by 18:00 (6:00 pm) each Thursday.

#### Revision History

Date	Description
XXXX-XX-XX	Revised subsections 3(1) and 10(1) from 24 months to 48 months
2016-08-30	Inclusion of the defined term <b>system element</b> .
2014-07-02	Initial release