ISO Rules
Part 500 Facilities
Division 503 Technical & Operating Requirements
Section 503.1 Functional Specification & Legacy Treatment

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Applicability

1   Section 503.1 applies to:

(a) a **legal owner** of a **generating unit**, **aggregated facility**, or **energy storage resource** that is directly connected to the **transmission system**, or to **transmission facilities** within the City of Medicine Hat; and

(b) a **legal owner** of a **bulk transmission line**;

(c) the **ISO**.

Requirements

Functional Specification

2(1)   The **ISO** must, approve a functional specification containing details, work requirements, and specifications for the design, construction, and operation of a project and any associated **transmission system** connection facilities.

(2)   The functional specification referred to in subsection 2(1) must be generally consistent with the provisions of Division 503 of the **ISO rules**, as applicable, but may contain material variance the **ISO** approves based upon its analysis of any one or more of the technical, economic, safety, operational and reliability requirements of the interconnected electric system related to the specific facility.

Legacy Treatment

3   A **legal owner** must, unless otherwise specifically stated in an **ISO rule** within Division 503 of the **ISO rules**, remain compliant with the applicable predecessor document to an **ISO rule** within Division 503 if the **legal owner**'s facility received either of the following prior to the effective date of an **ISO rule** within Division 503:

(a) a first version of the final functional specification issued by the **ISO**; or

(b) approval for the construction and operation of the facility from the relevant regulatory authority with jurisdiction.

Modifications to Generating Units, Aggregated Facilities and Energy Storage Resources

4(1)   A **legal owner** of a **generating unit**, **aggregated facility**, or **energy storage resource** must, notwithstanding subsection 3, comply with the applicable requirements of Division 503 of the **ISO rules** if the **legal owner**'s facility or resource, or any supporting systems, undergoes an addition or upgrade.

(2)   The **legal owner** of an **aggregated facility** that was energized and commissioned prior to April 7, 2017 must, notwithstanding subsection 4(1), comply with the applicable requirements of Division 503 of the **ISO rules** only if the **legal owner** replaces existing equipment where the equipment replaced has **a gross real power** capability equal to or greater than 5 MW, irrespective of whether the cumulative **gross real power** capability of the **aggregated facility** is increased.

(3)   This subsection 4 does not apply to identical or similar replacements, or maintenance-related activities.

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Modifications to Transmission Facilities

5 A **legal owner** of an existing **bulk transmission line** that is extending, tapping, or adding to the **bulk transmission line**:

    (a) must, if the project circuit length will be greater than or equal to 1,500 meters, comply with the applicable requirements of Division 503 of the **ISO rules**; or

    (b) must, if the project circuit length will be less than 1,500 meters, comply with the:

        (i) applicable technical specification and design requirements for the **bulk transmission line** in effect as of the original date of the commencement of the design of the **bulk transmission line**; and

        (ii) specifications set out in the most recently published edition of the *Alberta Electrical Utility Code.*

Authority to Require Compliance

6 The **ISO** may, notwithstanding subsection 3, require a **legal owner** to comply with any provision of Division 503 if the **ISO** determines that such compliance is necessary for the safe and reliable operation of the **interconnected electric system**.

Revision History

Date	Description
2024-04-01	Initial release.