

# ISO Rules

## Part 500 Facilities

### Division 504 Legal Owners of Transmission Facilities and Load Facilities

#### Section 504.3 Coordinating Energization, Commissioning, and Ancillary Services Testing



#### Applicability

- 1 Section 504.3 applies to:
  - (a) the **legal owner** of a **transmission facility** that requires:
    - (i) a new connection to other **transmission facilities** in the **balancing authority area** of the **ISO**;
    - (ii) a **transmission facility** modification to facilities with equipment listed in subsections 5 or 6;  
or
    - (iii) testing in accordance with any **ancillary services** technical requirements;
  - (b) the **legal owner** of a transmission-connected load facility, which the **ISO** determines may impact the reliable operation of the **interconnected electric system** and notifies the **legal owner** of such determination, and that requires:
    - (i) a new connection to other **transmission facilities** in the **balancing authority area** of the **ISO**;
    - (ii) a **transmission facility** modification to facilities with equipment listed in subsection 5 or 6;  
or
    - (iii) testing in accordance with any **ancillary services** technical requirements;
- and
- (c) the **ISO**.

#### Requirements

##### Connecting New Facilities

**2(1)** The **legal owner** of a **transmission facility** or transmission-connected load facility must not energize its facility until obtaining written confirmation from the **ISO** that:

- (a) the **legal owner** has met the energization requirements; and
- (b) the **legal owner's** final **commissioning** plan, required under subsection 4, is approved.

**(2)** The **legal owner** of a **transmission facility** or transmission-connected load facility must, not less than one hour prior to energizing any facility, phone the **ISO** and obtain verbal authorization from the **ISO** to energize the facility.

**(3)** The **legal owner** of a **transmission facility** or transmission-connected load facility may, after receiving the authorization in subsection 2(2), energize the facility and commence the **commissioning** activities.

##### Conducting Ancillary Services Testing

**3(1)** The **legal owner** of a **transmission facility** or transmission-connected load facility must not begin testing its facility in accordance with **ancillary services** technical requirements until obtaining written confirmation from the **ISO** that the **legal owner's** final testing plan,

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required under subsection 4, is approved.

(2) The **legal owner** of a **transmission facility** or transmission-connected load facility must, not less than one hour prior to testing any facility in accordance with **ancillary services** technical requirements, phone the **ISO** and obtain verbal authorization from the **ISO** to energize the facility.

(3) The **legal owner** of a **transmission facility** or transmission-connected load facility may, after receiving the authorization in subsection 3(2), commence testing activities in accordance with **ancillary services** technical requirements.

#### Plans for Commissioning New Facilities or Conducting Ancillary Services Testing

4 The **legal owner** of a **transmission facility** or transmission-connected load facility must provide final, written **commissioning** or testing plans to the **ISO**:

- (a) which the **ISO** approves as implementable without impacting the reliable operation of the **interconnected electric system**;
- (b) detailing the types of tests the **legal owner** proposes to conduct;
- (c) in sufficient time to allow the **ISO** to approve the plans a minimum of 30 **days** prior to **commissioning**; and
- (d) containing the minimum detail as noted in subsection 5 and 6, as appropriate.

#### Plan Details for Commissioning and Ancillary Services Testing of Major Facilities

5 The **legal owner** of a **transmission facility** or transmission-connected load facility that owns any of the following **transmission facilities**:

- (a) motors of a rating sufficient to cause operational concerns, as the **ISO** identifies during the connection project process;
- (b) static VAr compensators;
- (c) high voltage direct current facilities;
- (d) flexible alternating current transmission system devices;
- (e) phase shifting transformers;
- (f) alternating current transmission line series compensation;
- (g) synchronous condensers; or
- (h) energy storage included in a **needs identification document** that has been approved by the **Commission**,

intending to conduct **commissioning** or **ancillary services** testing activities on such facilities, must include in its **commissioning** or testing plan the details of the proposed testing activities, including the expected output, consumption or transfer of **real power** and **reactive power** from the facility to the

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**interconnected electric system** and over what periods of time.

#### Commissioning Minor Facilities Plan Details

**6** The **legal owner** of a **transmission facility** or transmission-connected load facility intending to conduct **commissioning** and testing activities on any of the following:

- (a) circuit breakers;
- (b) transformers and voltage regulators;
- (c) capacitor banks;
- (d) reactors; and
- (e) alternating current transmission lines,

must include in its **commissioning** plan the proposed date and time of energization.

#### Changes to Approved Commissioning or Testing Activities

**7(1)** The **ISO** may amend or suspend any **commissioning** or testing activities it has already approved under subsection 4, based on real time **reliability** requirements of the **interconnected electric system** and necessary **ISO** operational flexibility, and it may do so by providing written or verbal notice to the **legal owner** of the facility.

**(2)** The **legal owner** of a **transmission facility** or transmission-connected load facility may suspend its **commissioning** or testing activities by giving verbal notice to the **ISO**.

**(3)** The **legal owner** of a **transmission facility** or transmission-connected load facility may amend its **commissioning** or testing activities by making a verbal request to the **ISO** and obtaining verbal approval.

**(4)** A **legal owner** of a **transmission facility** or transmission-connected load facility that has amended or suspended any previously approved **commissioning** or testing activities must, if the **ISO** requests, submit a revised, written **commissioning** or testing plan and must do so within the timeframe the **ISO** specifies in order to proceed with **commissioning** or testing activities.

#### Revision History

| Date       | Description  |
|------------|--|
| 2024-04-01 | Amended, as approved in <b>Commission</b> Decision 28176-D01-2023 issued on June 13, 2023. |
| 2012-12-31 | Initial release  |