

ISO Rules

Part 500 Facilities

Division 504 Legal Owners of Transmission Facilities and Load Facilities

Section 504.4 Coordinating Operational Testing



Applicability

- 1 Section 504.4 applies to:
 - (a) the **legal owner** of a **transmission facility**:
 - (i) that is already in normal operation; and
 - (ii) for which the **legal owner** intends to conduct operational testing activities;
 - (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
 - (i) that is already in normal operation; and
 - (ii) for which the **legal owner** intends to conduct operational testing activities; and
 - (c) the **ISO**.

Requirements

Conducting Operational Testing Activities

- 2(1)** The **legal owner** of a **transmission facility** or transmission-connected load facility must not conduct operational testing activities on the facility until obtaining written confirmation from the **ISO** that the **legal owner's** final operational testing plan, required under subsection 3(2), is approved.
- (2)** The **legal owner** of a **transmission facility** or transmission-connected load facility must, no less than one hour prior to conducting operational testing activities on any facilities, phone the **ISO** and obtain verbal authorization from the **ISO** to conduct the activities.
- (3)** The **legal owner** of a **transmission facility** or a transmission-connected load facility may, after receiving the authorization in subsection 2(2), conduct the testing activities.

Major Operational Testing Plan Details

- 3(1)** 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 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**.

must provide its final, written operational testing plans to the **ISO** detailing the proposed date and time of testing, the proposed testing activities, including the expected output, consumption or transfer of **real power** and **reactive power** from the facility to the **interconnected electric system** and over what

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periods of time.

- (2) The **legal owner** of a **transmission facility** or transmission-connected load facility that provides final, operational testing plans to the **ISO** under subsection 3(1) must ensure that:
- (a) the **ISO** approves such plans as being able to be implemented without impacting the reliable operation of the **interconnected electric system**; and
 - (a) the **legal owner** provides such plans in sufficient time to allow the **ISO** to approve the plans a minimum of 15 **days** prior to the desired testing date.

Unexpected Operational Testing Plan Details

- 4 The **legal owner** of a **transmission facility** or transmission-connected load facility who desires to perform operational testing in order to recover from an unexpected operational problem must:
- (a) contact the **ISO** by phone to request approval for the testing;
 - (b) provide a description of the testing, including the expected output, consumption or transfer of **real power** and **reactive power** from the facility to the **interconnected electric system** and over what periods of time;
 - (c) not initiate the testing until obtaining verbal approval from the **ISO**; and
 - (d) phone the **ISO** to advise when the testing is complete.

Changes to Approved Testing Activities

- 5(1) The **ISO** may amend or suspend any testing activities it has already approved, 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 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 testing activities by making a verbal request to the **ISO** and obtaining verbal approval from the **ISO**.
- (4) A **legal owner** of a **transmission facility** or transmission-connected load facility that has amended or suspended any previously approved testing activities must, if the **ISO** requests, submit a revised written operational testing plan and must do so within the timeframe the **ISO** specifies in order to proceed with the testing activities.

Revision History

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