

ISO Rules

Part 500 Facilities

Division 505 Legal Owners of Generating Facilities

Section 505.4 Coordinating Operational Testing



Applicability

- 1 Section 505.4 applies to:
 - (a) the **legal owner** of a **generating unit** or **energy storage resource**:
 - (i) with a rating of 5 MW or greater;
 - (ii) connected to **transmission facilities** or to an **electric distribution system**, in the **balancing authority area** of the **ISO**;
 - (iii) that is already in **commercial operation**; and
 - (iv) for which the **legal owner** intends to conduct operational testing activities;
 - (b) the **legal owner** of an **aggregated facility**:
 - (i) with a rating of 5 MW or greater;
 - (ii) connected to **transmission facilities** or to an **electric distribution system**, in the **balancing authority area** of the **ISO**;
 - (iii) that is already in **commercial operation**; and
 - (iv) for which the **legal owner** intends to conduct operational testing activities;
 - (c) the **ISO**.

Requirements

Plans for Operational Testing

- 2 The **legal owner** of a **generating unit**, **energy storage resource**, or **aggregated facility** must provide final, written operational testing plans to the **ISO**:
 - (a) which the **ISO** approves as being able to be implemented without impacting the **reliability** of the **interconnected electric system**;
 - (b) detailing the proposed date and time of operational testing and expected duration;
 - (c) specifying the types of operational testing activities;
 - (d) detailing the expected output of **real power** and **reactive power** from the **generating unit** or **energy storage resource** to the **interconnected electric system** and over what periods of time; and
 - (e) in sufficient time to allow the **ISO** to approve the operational testing plans a minimum of **15 days** prior to the desired testing date.

Conducting Operational Testing Activities

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

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(4) The **legal owner** of a **generating unit**, **energy storage resource**, or **aggregated facility** that desires to perform operational testing that is required in order to recover from an unexpected operational problem must:

- (a) contact the **ISO** by phone to request approval for the operational testing;
- (b) provide a description of the operational 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 operational testing until obtaining verbal approval from the **ISO**; and
- (d) phone the **ISO** to advise when the operational testing is complete.

Changes to Approved Testing Activities

4(1) The **ISO** may amend or suspend any operational 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 **generating unit**, **energy storage resource**, or **aggregated facility** may suspend its operational testing activities by giving verbal notice to the **ISO**.

(3) The **legal owner** of a **generating unit**, **energy storage resource**, or **aggregated facility** may amend its operational testing activities by making a verbal request to the **ISO** and obtaining verbal approval from the **ISO**.

(4) A **legal owner** of a **generating unit**, **energy storage resource**, or **aggregated facility** that has amended or suspended any previously approved operational 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 operational 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