

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)** Each of the **legal owner** of a **transmission facility** and the **legal owner** of a 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)** Each of the **legal owner** of a **transmission facility** and the **legal owner** of a transmission-connected load facility must, on the **day** of but no less than one (1) 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)** After receiving authorization to conduct operational testing activities on a facility, the **legal owner** of a **transmission facility** and the **legal owner** of a transmission-connected load facility may conduct the testing activities.

Major Operational Testing Plan Details

- 3(1)** Each of the **legal owner** of a **transmission facility** and the **legal owner** of a 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** identified during the connection process;
 - (b) static VAr compensators;
 - (c) high voltage direct current facilities;
 - (d) flexible alternating current transmission system devices;

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- (e) phase shifting transformers;
- (f) alternating current transmission line series compensation;
- (g) synchronous condensers; or
- (h) energy storage facilities,

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 periods of time.

(2) The **legal owner** of a **transmission facility** and the **legal owner** of a 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
- (b) the **legal owner** provides such plans in sufficient time to allow the **ISO** to approve the plans a minimum of fifteen (15) **days** prior to the desired testing date.

Unexpected Operational Testing Plan Details

4 Each of the **legal owner** of a **transmission facility** and the **legal owner** of a 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) Each of the **legal owner** of a **transmission facility** and the **legal owner** of a transmission-connected load facility may suspend its testing activities by giving verbal notice to the **ISO**.

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

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approval from the **ISO**.

(4) A **legal owner** of a **transmission facility** and the **legal owner** of a 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

Effective	Description
2012-12-31	Initial Release