

System Access Service Request (SASR) Guide

Independent & Cluster

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1. Purpose & Applicability

This document provides Applicants with information on how to complete the system access service request (SASR) application form for both the Independent Assessment Process and the Cluster Assessment Process.

Market participants are required to follow the Cluster Assessment Process if their facility:

- will inject 5 MW or more of new or incremental energy flow into the Alberta interconnected electric system (AIES) at the facility connection to the AIES; and
- the injection is caused by the addition of a facility having 5 MW or more of maximum authorized real power (MARP) or increasing the MARP at an existing facility by 5 MW or more.

Load and reliability projects follow the Independent Assessment Process. Generation and energy storage projects that propose to inject less than 5 MW of new or additional flow into the AIES will also follow this process.

Additional guidance and information will be added to this document as required. Please contact customer.connections@aeso.ca for any questions.

2. General Information

To request new or amended system access service (SAS) on the transmission system, including the alteration of existing SAS by the addition of downstream distributed energy resources (DER), a completed SASR must be submitted to the AESO. The AESO relies on the information provided in the SASR to assess impacts to the AIES and to select an appropriate preferred connection alternative.

Applicants must submit completed SASRs and all required attachments to the AESO through Adobe Workfront. All required sections in the SASR should be completed per this guide, and all required attachments must be submitted with the SASR. If an Applicant fails to complete and submit the SASR and required attachments as per this guide, the AESO may reject the SASR.

If after accepting a SASR the AESO determines that information provided in the SASR was incomplete, inaccurate, or misrepresented, the AESO may cancel the SASR and associated project in the AESO Connection Process.

3. How to Use Adobe Workfront

3.1 SASR Submission and Monitoring

To submit a SASR through Workfront, email customer.connections@aeso.ca to request for an account to be created.

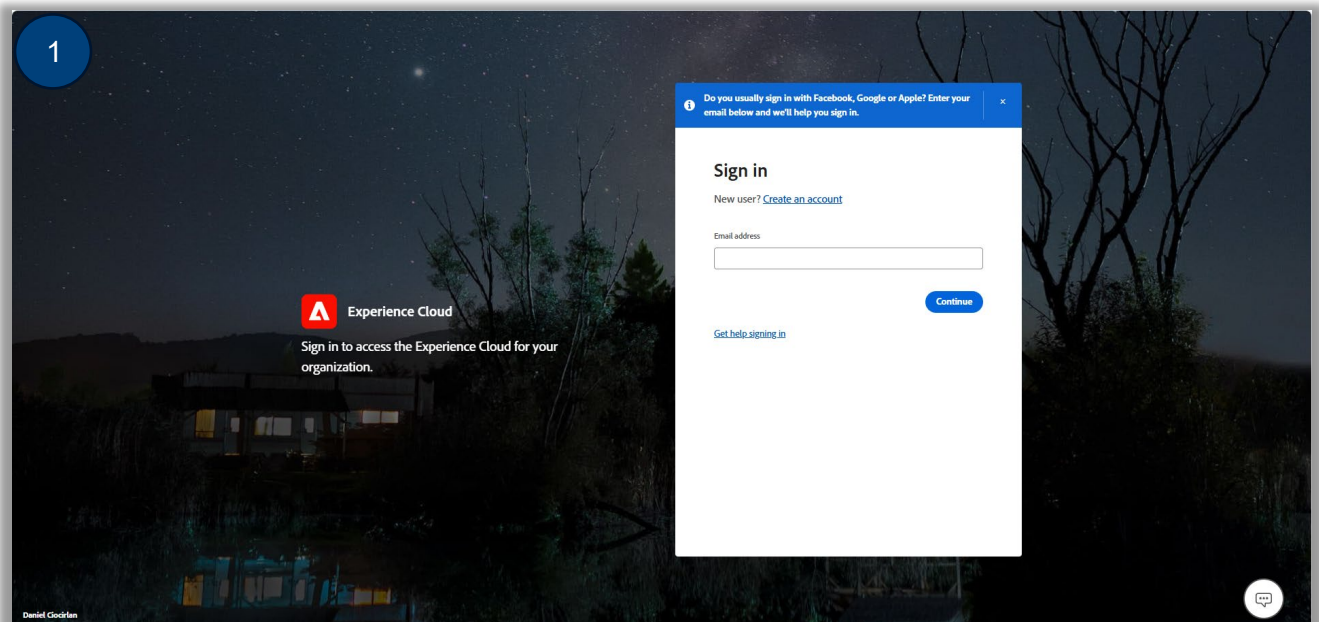
3.1.1 Log-in

Once the account has been created, access the following link:

<https://experience.adobe.com>

You will be directed to the Adobe Experience Cloud Home Page. Please follow the steps below to log in:

1. Enter your corporate email address in the designated field.



2. Click on “Reset your password”.
3. Enter the verification code that was sent to your email.

2

Password

☒ Stay signed in [Continue](#)

[Reset your password](#)

[Sign in to a different account](#)

3

[Back](#) [Resend Code](#)

4. Register your new password by following the instructions.
5. Log in to your account using your email and the new password.

4

New password

Repeat password

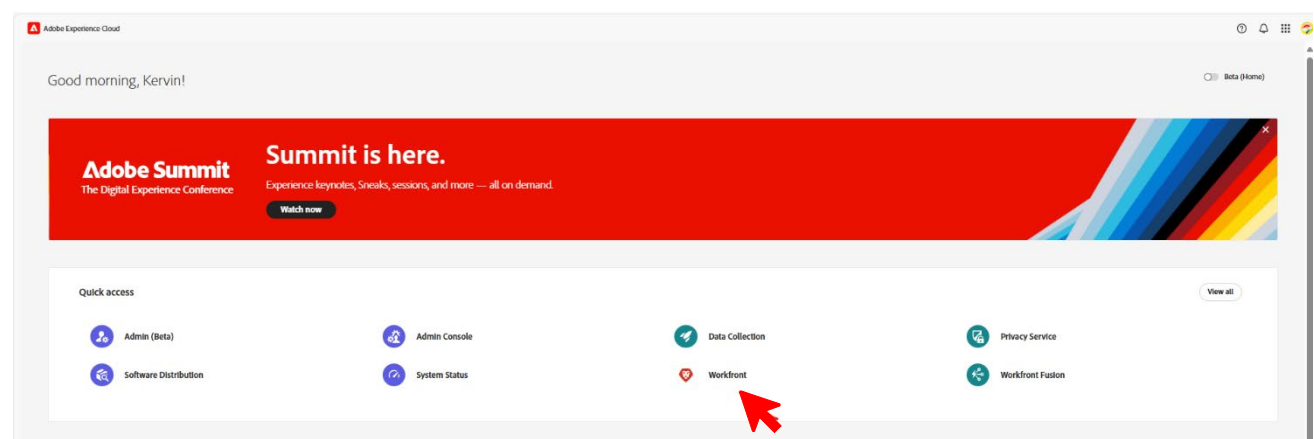
☒ Sign out of all active logins [Update Password](#)

5

Password

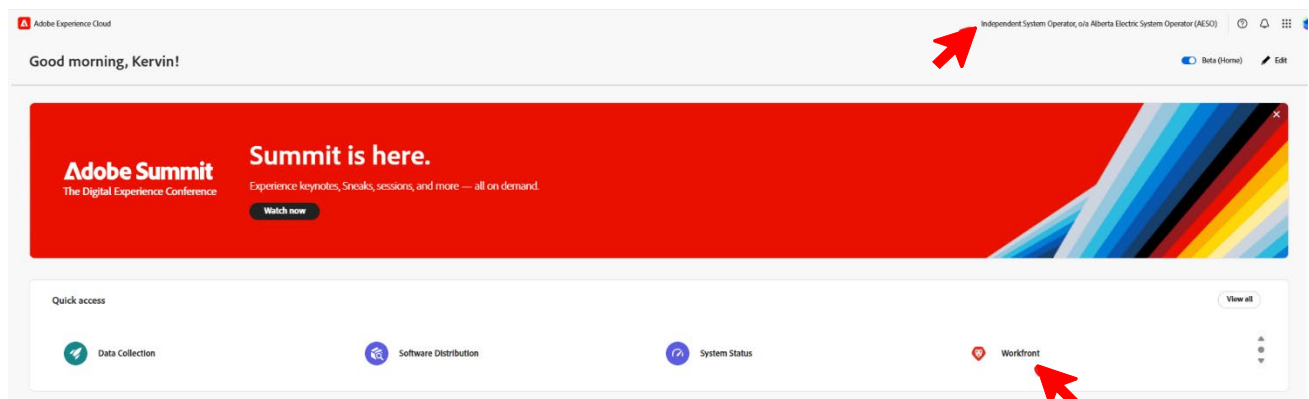
☒ Stay signed in [Continue](#)

6. Once logged in, click on Workfront. This should appear on the list of Adobe products.



Important: If you have Adobe SSO in your organization, you will be redirected to another page (e.g. Microsoft Credentials) after entering your corporate email in **Step 1**. In this case, log in with your corporate password through SSO to skip **Steps 2 to 5**.

In **Step 6**, select **Independent System Operator** in the drop-down menu in the upper-right hand corner of the screen. Click on Workfront which should appear on the list of Adobe products.



3.1.2 Market Participant Dashboard

After logging into your account with your new password, you will automatically be directed to the Market Participant Dashboard, which was designed to meet the needs of external users by providing a centralized and user-friendly interface to submit and manage your requests efficiently.

The screenshot displays the Market Participant Dashboard interface. It features a top navigation bar with a 'Market Participant' menu item (callout 1) and a user profile icon (callout 2). The main content area is divided into four sections:

1. **Links** (callout 2): A list of quick actions including 'Submit new System Access Request (SASR)', 'SASR Saved Drafts', 'AESO - Connection Process', and 'AESO - Connection Project List Dashboard'.

2. **SASR Monitoring** (callout 3): A table listing submitted SASRs with columns for Name, Contact Name, Status, Entry #, and Last Update. Below the table are two bar charts showing the count of SASRs by status: 'SASR Under Review' (1) and 'SASR Submitted' (1).

3. **Project Monitoring** (callout 4): A table listing projects with columns for Name, Project Name, Project Type, Status, and a timeline of stages (Stage 0 to Stage 6) with completion dates. Below the table is a 'View Map' link and a URL.

The dashboard is organized into four key areas:

1. **Menu** – Important Icons
2. **Links** – Submit a new SASR, resume saved drafts, and access external resources.
3. **SASR Monitoring** – Track the status of your submitted SASRs.
4. **Project Monitoring** – Monitor your active project engagements with AESO

Menu

When you access the landing page, you may notice that there are several icons displayed. However, the two most important ones are:

- **Market Participant** – Located in the upper-right corner of the screen, this button acts as a shortcut to return to the main dashboard at any time.
- **Notifications** – Located in the upper-left corner, this icon allows you to view all notifications you’ve received regarding your requests, updates, or system messages.

Links

The section below contains key links within your dashboard, offering quick shortcuts to internal and external pages to streamline navigation and save time.

The screenshot shows the 'Market Participant - Dashboard' interface. At the top, there is a header with a 'DASHBOARD' label and a 'Market Participant - Dashboard' title. Below the header, there are five numbered links, each highlighted with a red box and a corresponding number:

- 1 [1] Click to submit a new SASR request //// [2] Click to access and resume your auto-saved requests //// [3] Click to access the AESO Connection Process - Website //// [4] Click to ... More
- 2 [1] Submit new System Access Service Request (SASR)
- 3 [2] SASR Saved Drafts
- 4 [3] AESO - Connection Process
- 5 [4] AESO - Connection Project List Dashboard

1. Instructions on using dashboard features.

This provides a brief overview of dashboard features. Click “More” to view the full details.

2. Submit new System Access Service Request (SASR)

Click on the link to start a new SASR request.

You will be directed to the request form page.

Please follow the on-screen instructions carefully and complete all required fields before submitting your SASR.

New request Share path

Request Type
SASR - System Access Service Request

Details

Subject *
Type request subject
ⓘ This field is required.

SASR - System Access Service Request

Instructions

- 1 - Please follow this naming convention for the "Subject" field: [Company Name] - [Project Name]
- 2 - Select the Assessment Type: Fields will appear automatically based on your selection.
- 3 - Complete All Required Fields: It is essential to complete all fields relevant to your request to ensure proper processing. Fields marked with an asterisk (*) are mandatory, and the request cannot be submitted without completing them.
- 4 - Attach Supporting Information: Include all relevant technical documents that support or complement your request.
- 5 - Review Before Submitting: Double-check all information to avoid delays in processing.

SASR - Assessment Type*

Documents

Drag and drop files
OR
[Add or link files](#)
Try to keep file size under 10mb or attach file after creation.

Submit Close

3. SASR Saved Drafts

Click on the link to resume working on a previously saved SASR.

Select the draft you wish to continue by identifying it based on the name or last modified date and proceed to complete the remaining information before submitting.

Adobe Workfront Currently logged in as Market Participant Test User Logout

Requests New request

Drafts (1)

Subject	Path	Entry Date	Last Update Date
<input type="checkbox"/> Test 5 - New Form	SASR - System Access Service Request	7/8/2025, 2:57 PM	7/8/2025, 2:57 PM

4. AESO – Connection Process

Click on the link to access the AESO website for detailed information about the AESO connection process.

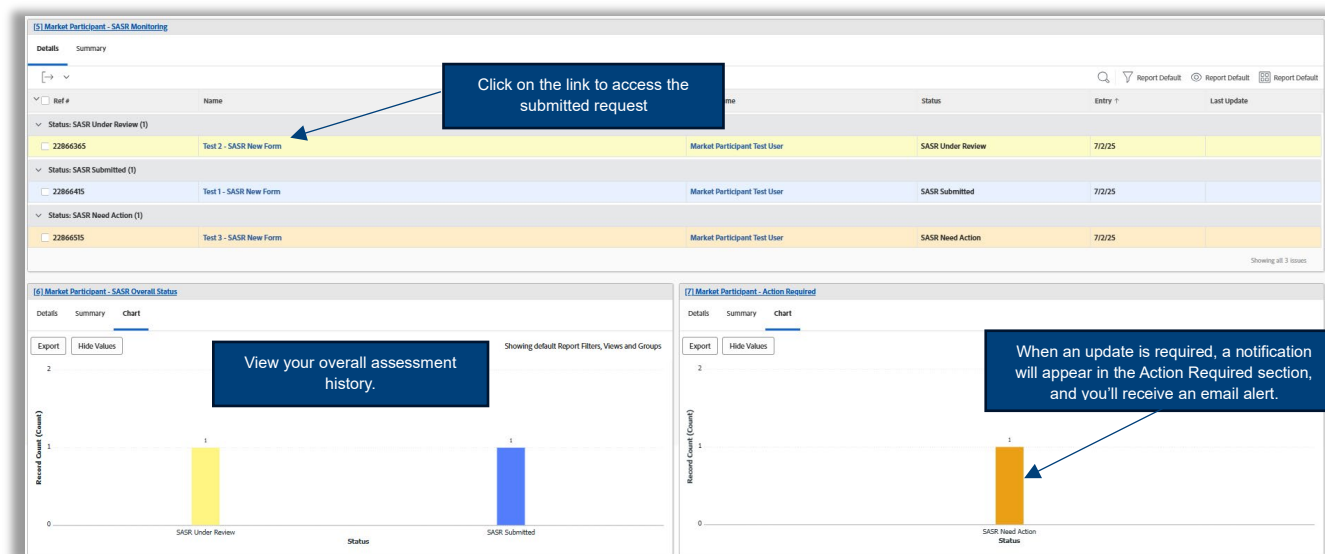
5. AESO – Connection Project List Dashboard

Click on the link to access the Connection Project List Dashboard published on the AESO website.

SASR Monitoring

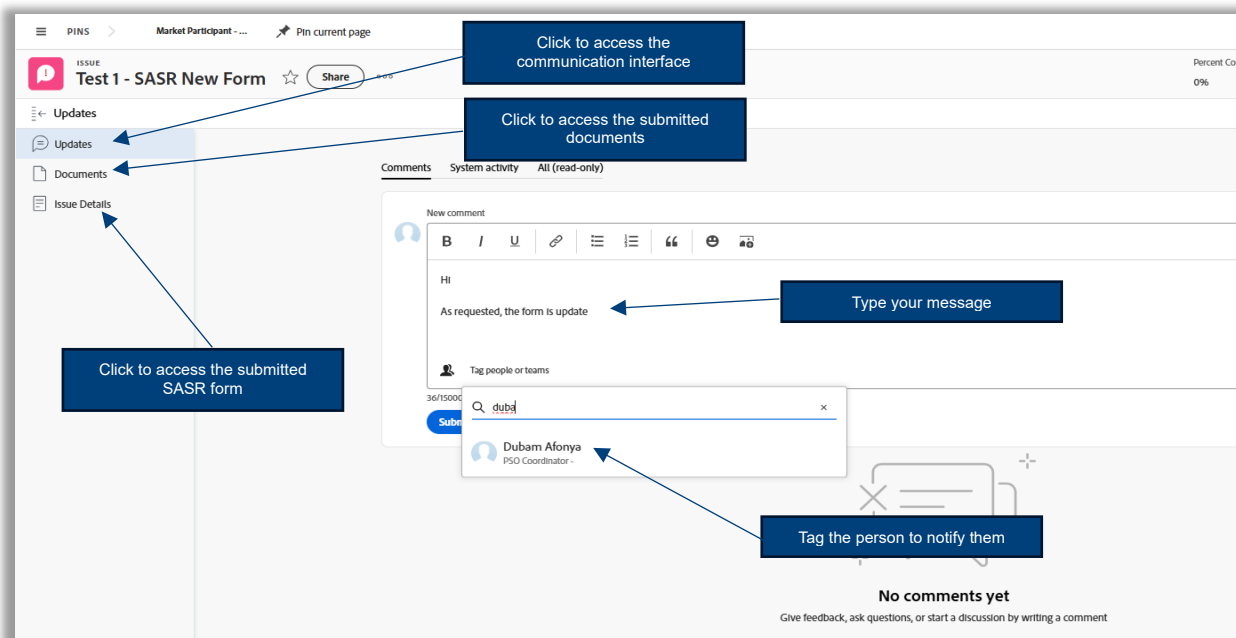
This section allows you to view and monitor your submitted SASRs.

You will be able to access the assessment by clicking on the corresponding link and track the status of the evaluation in real time.



After clicking the link, you will be directed to the Assessment Page, where you can:

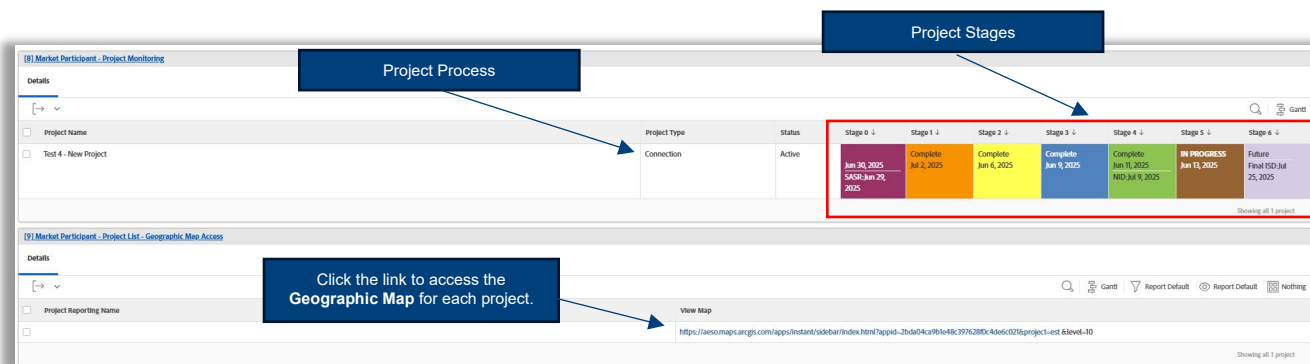
- Send messages directly to the AESO internal team.
- Receive communications or notifications from the AESO.
- Upload new documents or replace existing ones.
- Update the form if a revision is requested.



Project Monitoring

A project becomes active when it completes Stage 0 of the AESO Connection Process.

This section allows you to view and monitor your active projects.



Active Project Monitoring

Projects are categorized into three process types. To determine which applies to your project, refer to the **"Project Type"** column. Once identified, you will be able review the corresponding process description below to better understand each **Stage** in detail:

- [Connection Process](#)
- [Behind the Fence Process](#)
- [Contract Process](#)

As the Project Manager executes each task in the timeline, you will be able to see the milestones and their respective planned completion dates.

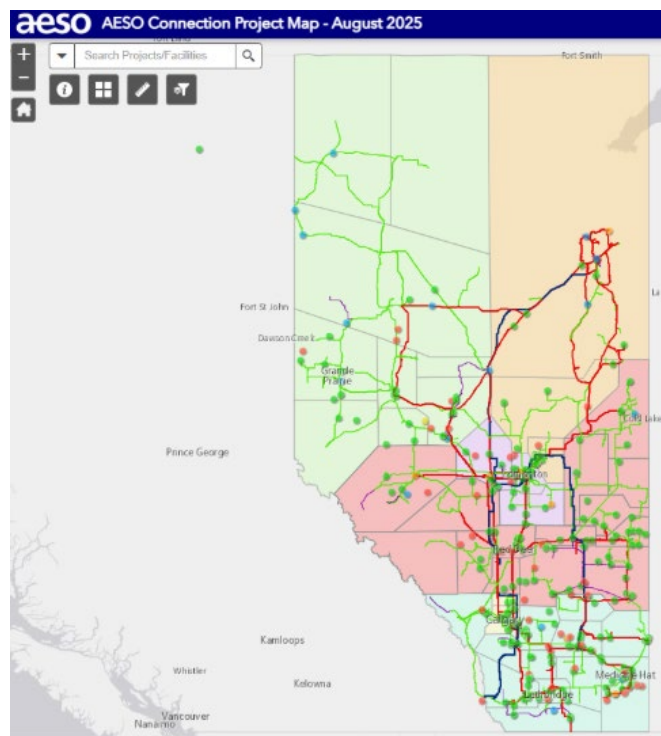
When a stage is completed, its status will be updated to “Complete”, and the next stage will change to “In Progress”, respectively.

- **Geographic Maps**

There is also a link to access the Geographic Map for each project.

The AESO Connection Project Map is an online interactive tool that provides a visual, geographic representation of connection projects, overlaid with the AESO’s provincial Planning Areas and Regions.

For any questions regarding the use of this map, please contact customer.connections@aeso.ca



4. Guidance for Completing the SASR

Refer to the following tables for information on how to complete each section of the SASR.

* Indicates a **Cluster-only** field.

Section 1 – Contact Information

Title	Details
1-1 Applicant	
Applicant Contact Information	<p>The Applicant will be the holder of any SAS agreements requested in the SASR and must be the same legal owner as the holder of any SAS agreements being modified by the SASR. For DERs, this will be the legal owner of the electric distribution system, the Distribution Facility Owner (“DFO”).</p> <p>The Applicant is the party that is accountable for compliance with the Rate Demand Transmission Service (DTS) and/or Rate Supply Transmission Service (STS) terms and conditions per the ISO tariff.</p> <p>The Applicant must be duly registered and authorized to carry on business in Alberta, and the Corporate Legal Name must match exactly the Legal Entity Name in the Government of Alberta Corporate Registration System.</p> <p>If the SASR will involve a change in ownership to an existing SAS agreement, please contact customer.connections@aeso.ca before submitting.</p>
Study Consultant	<p>The Study Consultant is the party that will work with the AESO on behalf of the Applicant to perform connection studies for the project. A Study Consultant must be identified for all projects that require an independent assessment to be performed.</p> <p>Contact customer.connections@aeso.ca if you are unsure if a Study Consultant is required for this SASR. The Study Consultant must be licensed to practice engineering in Alberta.</p>
*Contact for Fee Invoicing	<p>Provide information for the contact to whom cluster fee invoices should be addressed. This contact must be with the Applicant company. For SASRs involving DERs, this contact must be with the DFO.</p>

Title	Details
*Accounts Payable E-mail	Provide the email address where cluster fee invoices should be sent. This email must be with the Applicant company. For SASRs involving DERs, this email must be with the DFO.
1-2 Generating Unit / Energy Storage Resource / Aggregated Facility / Industrial Facility Owner	
Customer Facility Owner	The Customer Facility Owner is the party that owns the generation, energy storage, or industrial facilities that are being connected or modified with the request, and will provide the details of those facilities to the Applicant for inclusion in the SASR.
Integrated Project Manager (IPM)	<p>The Integrated Project Manager (IPM) is selected by the Applicant, and is responsible to coordinate activities through the life cycle of the project, and ensure the project moves at the pace required by the Applicant while following ID #2018-018T, <i>Provision of System Access Service and the AESO Connection Process</i> and the appropriate AESO project process.</p> <p>The AESO retains the role of governing gate requirements. The IPM is expected to schedule the project kick-off meeting and coordinate next steps required for Stage 1 completion.</p>

Section 2 – Request Information

Title	Details
2-1 Details	
Description	Provide a description of your request. Include any relevant details related to what is being connected or modified, timing, preferred connection locations, operational setup, ownership structure, desired reliability requirements, etc.
Market Participant Choice (MPC)	<p>Indicate if the Applicant is seeking to build any part of the project under the Market Participant Choice option.</p> <p>Eligibility for this option will depend on the preferred connection alternative selected for the project and will be confirmed at the end of Stage 2. See the Market Participant Choice page on the AESO website for more information.</p>

Title	Details
Related SASRs or Projects	List any related SASRs that have been submitted concurrently with the SASR, and/or any related ongoing or cancelled projects. Provide an explanation of how they are related. e.g. SASR is a resubmission of a previously cancelled project, SASR is an expansion of an ongoing project, SASR will share facilities with another submitted SASR, etc.
Future Development	List any future development planned or considered for the site that is not being requested in the SASR, such as expansions, changes in operational nature (including self-supply), changes in ownership structure (in whole or in part), addition of generation, energy storage, large loads, etc.

Section 3 – Customer Facility Information

Title	Details
3-1 Description	
New Facility or Modification to an Existing Facility	Indicate if this is a new facility connecting to the grid, or if it is a modification of an existing facility already connected to the grid. e.g., expansion, unit increase, on-site energy storage.
Facility Name	<p>Provide the name of the facility that is part of the request (e.g., the name of the wind farm, solar farm, industrial facility). This facility name should be used in communications with the AESO going forward. It can be the proposed facility name that is or will be included in the power plant application filed with the Alberta Utilities Commission.</p> <p>The root word(s) in the proposed facility name should be a maximum of two words, pronounceable, 20 characters or less, and cannot include corporate names. E.g. the root words in the facility name “Black Lake Solar Centre” are “Black Lake”.</p> <p>The AESO ensures that the root word(s) in each facility name is unique and distinguishable from others on the AIES. As a result, a change to the facility name proposed by the Applicant may be required.</p>

Title	Details
	In Stage 0, the AESO will confirm the Applicant's name selection or provide an alternative name, after which substation and asset names will be aligned with the selected facility name.
Distribution Deficiency Report (DDR)	<p>For <u>DFO Applicants</u>, a DDR must be included with the SASR for projects that will require new transmission facilities due to a distribution deficiency. This deficiency may be caused by load growth, reliability concerns, or the addition of distribution-connected generation.</p> <p>A DDR provides information about the DFO's decisions relating to the electric distribution system, including the DFO's reasons for submitting a SASR to the AESO. The DDR assists the AESO in determining how to respond to the DFO's SASR and supports the content in the AESO's need approval process.</p> <p>Guidelines for the preparation of the DDR can be found in the DDR Author's Guide posted on the Templates page on the AESO website.</p>
Assigned Substation Name / Number	For existing transmission connected facilities, provide the name and number that was assigned to the customer facility substation. Note that this is not the substation the Applicant wishes to connect to, or the upstream substation for a DER facility.
Facility Legal Land Description	Provide the legal land description for the customer facility (legal subdivision or quarter section, section, township, range, and meridian). For aggregated facilities, the location must be for the collector substation. For DERs, the location must be for the DER facility and not the upstream substation.
*90% Site Control	Projects following the Cluster Assessment Process that are not located on Crown land must confirm that ownership, a lease, or an option to lease is in place for at least 90% of the site required for the generation or energy storage facility at the time of application.
Shared Facilities	Explain any infrastructure or services the customer facility shares or will share with any other existing or planned facilities approved under a separate AUC decision (control buildings, station service, bus, fence, access, etc.).

Title	Details
	The proximity and nature of the shared facilities may impact the connection alternatives that are considered, and failure to disclose may result in cancellation.
3-2 Grid Connection	
Transmission or Distribution	Indicate if the customer facility is or will be connected to the AIES at the transmission or distribution level (i.e., the transmission system or distribution system).
Facility Connection Date	<p>For new facilities, provide the date the facility is expected to have an energized connection to the AIES (transmission or distribution) and is capable of exchanging energy (regardless of if any energy is planned to flow on that date or not).</p> <p>Note that this is not the date the facility is expected to be commercially operational, but the date of first connection.</p>
DER Connections	For a DER facility, provide the feeder(s) that the facility will connect to (new or existing), the upstream substation name and number, and the 25 kV PSS/E bus number(s) in the substation that the feeder(s) connect to.
3-3 Technical Files	
Conceptual Facility SLD	A conceptual single line diagram (SLD) for the customer facility must be submitted with the SASR. The SLD must include the details of all switching devices within the facility. The SLD should not include the proposed/preferred connections to the transmission system.
*Stage 0 PDUP	Projects following the Cluster Assessment Process must submit a Stage 0 PDUP. See the Stage 0 PDUP Supplement on the Project Data Update Package Submissions page for more information.
*Stage 0 PDUP Checklist	A Stage 0 PDUP Checklist must be completed and submitted with the SASR and Stage 0 PDUP.
*PDUP Preparation	Provide the name and company of the engineers who prepared the Stage 0 PDUP and completed the Stage 0 PDUP Checklist.

Title	Details
3-4 Facility Loads	
Load Details	Provide details for the loads that will be added with the SASR, including any pre-existing loads at the facility, for station service, carbon capture, data centers and any other on-site loads such as industrial or commercial loads. Do not include charging for any energy storage resources, as this will be captured in Section 4.
3-5 AUC Applications and Approvals	
AUC Power Plant Application Status	<p>Provide the current status of the power plant application or energy storage resource facility application for the facilities requested in the SASR, along with the related AUC proceeding or decision number as applicable.</p> <p>If the requested facilities required or require an amendment to an existing approval in an AUC decision, provide the AUC decision number being amended.</p>
Self-Supply	<p>If generation from the power plant will be used to self-supply load located within the same site, indicate the nature of the self-supply. e.g. generation will solely supply on-site load without export to the grid, generation will both supply on-site load and export to the grid, or generation and load will be part of an industrial system.</p> <p>Also indicate if energy for settlement and market offers will be metered on a gross or net-to-grid basis.</p>

Section 4 – Source Asset Information

Section 4 is repeated for each new or modified source asset being requested with the SASR, with details specific to the source asset, followed by information for the various source components that are behind the asset (the combination of generating units, energy storage resources, and / or aggregated facilities that contribute energy flow to the source asset).

Title	Details
4.1-1 Energy Market	
New or Existing Source Asset	Indicate if this will be a new source asset in the energy market, or a change to an existing source asset. If it is a change to an existing source asset, provide the Asset ID assigned by the AESO.

Title	Details
Maximum Capability (MC)	<p>See the Consolidated Authoritative Document Glossary for the full definition of MC.</p> <p>Provide the MC being requested for the source asset, including the pre-existing MC if applicable, and the additional MC being requested with the SASR.</p> <p>MC should generally be equal to the sum of the maximum authorized real power (MARF) of the source asset components, unless using net-to-grid metered energy to self-supply loads, as indicated in Section 2.</p> <p>If the MC is lower due to a controller limitation on the asset output, indicate whether the limitation is due to MSSC compliance, a capacity limitation on the DFO feeder or upstream TFO substation transformer for a DER, or an operating decision by the GFO (e.g., limiting the output of a wind / battery combination to the MARF of the wind component).</p>
4.1-2 Source Asset Components	
Source Type	<p>Select the applicable source type for the component.</p> <p>Note that energy storage resources DC-coupled with generating units are considered a single component and source type, while AC-coupled energy storage resources and generating units are considered as separate components and source types.</p>
First Sync to Grid	<p>Provide the expected date that the component will be energized and is capable of supplying energy to the grid (regardless of if any energy is planned to flow on that date or not). This date will occur prior to commissioning of the component, as energy will be produced during the commissioning process.</p>
COD	<p>Provide the expected date of commercial operation (COD) when the component is fully commissioned and operating on the system in a normal manner.</p> <p>See the Consolidated Authoritative Document Glossary for the full definition of commercial operation.</p>
Installed Capacity	<p>Provide the nameplate or expected nameplate rating of the component. Include any pre-existing installed capacity if applicable, and the additional installed capacity being requested with the</p>

Title	Details
	SASR. If the component is an inverter-based resource, this should reflect the nameplate rating of the inverter(s).
Maximum Authorized Real Power (MARP)	<p>See the Consolidated Authoritative Document Glossary for the full definition of MARP.</p> <p>Include any pre-existing MARP if applicable, and the MARP being requested with the SASR. For an aggregated facility, this must reflect the reflect the real power delivered to the collector bus.</p>
Annual Energy Production	Provide an estimate of the total energy produced by the component during a calendar-year period. Include the pre-existing production if applicable, and the additional production being requested with the SASR.
Rated Energy	<p><i>Complete for components that include energy storage.</i></p> <p>Provide the amount of energy the energy storage resource is rated to store. Include the pre-existing rated energy if applicable, and the additional rated energy being requested with the SASR.</p>
Maximum Authorized Charging Power (MACP)	<p><i>Complete for components that include energy storage.</i></p> <p>See the Consolidated Authoritative Document Glossary for the full definition of MACP.</p> <p>Include any pre-existing MACP if applicable, and the MACP being requested with the SASR. For an aggregated facility, this must reflect the reflect the real power received at the collector bus.</p>
Charging Method	<p><i>Complete for components that include energy storage.</i></p> <p>Indicate whether the energy storage resource will be charged from the grid, from on-site generation, or from a combination of both.</p>

Section 5 – SAS Agreement Information

Section 5 has been split into sections for transmission connected facilities and distribution connected facilities, as the STS and DTS needs are specific to each. Each section also allows for up to four steps of capacity staging, if required by the energization plan of the project.

SAS agreements must be in place for any flows to or from the transmission system, as applicable, including during construction and commissioning. When considering the capacity staging needs of the project, consider the peak flows expected as the facility progresses through initial connection,

construction, the connection of different source components, energy storage charging, and long-term facility operation.

Title	Details
General Table Fields	
Event	Select the event that best describes why the capacity is required for this stage of the SAS agreement.
Date	<p>Select the date the capacity is required for this stage of the SAS agreement. This date should align with the dates of the event being selected for the stage, as provided in the Grid Connection and Source Asset Components sections of the SASR.</p> <p>Note that the executed SAS agreement will use a date of the first of the month for each stage.</p>
Capacity	Enter the capacity required for this stage of the SAS agreement in incremental values. This should reflect the maximum flow expected.
MPID	MPID is the measurement point identification. The MPID can be found on an existing SAS Agreement, or on the measurement point definition record (MPDR) associated with the existing SAS Agreement.
5-1 SAS Agreements Related To Transmission Connected Facilities	
STS Table	Each source asset for a transmission-connected facility must have its own STS agreement. If additional STS agreements are required, please contact customer.connections@aeso.ca before submitting.
DTS Table	A transmission-connected facility may have a single DTS agreement for the facility, and this table assumes that will be the case. If additional DTS agreements are required, please contact customer.connections@aeso.ca before submitting.
EUA Section 101 Requirements	Non-DFO Applicants who are submitting a SASR <u>with a load component</u> must submit a Section 101 Waiver. According to Section 101 of the Electric Utilities Act , the Applicant must obtain prior approval from the DFO in their service area to enter into an arrangement directly with the AESO for the provision of system access service for electricity to use on their property.

Title	Details
	<p>For cluster projects adding or increasing a DTS agreement, the SASR must be accompanied by:</p> <p>A Section 101 Waiver from the DFO; or</p> <p>Written confirmation from the DFO that they have no objections with the SASR being submitted and will determine the holder of the DTS prior to execution of the agreement.</p>
5-2 SAS Agreements Related To Distribution Connected Facilities	
STS and DTS Table	<p>For a facility connecting to the distribution system (i.e., a DER), the SAS agreements are applied at the upstream substation and based on the DFO service needs at that substation. The table assumes the DFO will hold one STS and one DTS agreement per substation. If additional STS or DTS agreements are required, please contact customer.connections@aeso.ca before submitting.</p>
Payment in Lieu of Notice (PILON) Waiver	<p>If the request may require a payment in lieu of notice (PILON) and the Applicant would like to request that the PILON be waived, a PILON waiver request may be submitted. For more information, refer to Appendix 5 and Appendix 5A of ID #2020-007, <i>Waivers and Variances</i>.</p>
5-3 Demand Opportunity Service	
DOS Interest	<p>More information about Rate DOS can be found on the AESO website (for Rate DOS and related ISO Tariff Section 9), including information on the application process.</p> <p>Indicate on the SASR if there is interest in applying for DOS for load at this facility, and if known, indicate the amount of load being considered.</p> <p>Note that the SASR is not the application for DOS, and any information provided here will not impact any future DOS application.</p>

Section 6 – SASR Submission

Section 6 (and the SASR itself) may be completed by either the Applicant or a designate of the Applicant who is authorized to certify that the information in the SASR is true and complete. The contact for the SASR will remain the party listed in Section 1 of the SASR.

5. Changes to the SASR

At any time during the AESO Connection Process, if any information provided in the SASR has changed, the Applicant is expected to inform the AESO of the change in a timely manner and submit a Project Change Proposal Form. The Project Change Proposal Form and Project Change Proposal Guidelines can be found on the [Templates](#) page on the AESO website.