

Overview of changes to the AESO Connection Process

Stakeholder Session

September 10, 2020

- WEBINAR INFO



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- Purpose of today's event
- Connection, Behind the Fence (BTF), and Contract Process changes in the Proposed Tariff
- Updates to the BTF Process
- Other process improvements

The background of the slide is a blue-tinted photograph of two hands shaking in a firm grip. The hands are positioned in the center-left of the frame. The background also features a faint, white, geometric network pattern of lines and dots, and a blurred cityscape at the bottom.

OUR ENGAGEMENT PRINCIPLES

Inclusive and Accessible

Strategic and Coordinated

Transparent and Timely

Customized and Meaningful

- Provide an overview of changes to the Connection, BTF, and Contract Processes in the Proposed Tariff
- Provide an overview of feedback received at November 2019 BTF stakeholder session and the resulting final process changes to the BTF Process
- Provide an overview of other improvements



IN SCOPE: Connection, BTF, and Contract Processes

Out of scope:

- Discussion regarding the Amended 2018 ISO Tariff Application and Compliance Filing
- Discussion/questions regarding future Tariff applications and topics (e.g. DFO participant-related costs and cost flow-through, bulk/regional rate design)
- Discussion regarding the Adjusted Metering Practice
- Project-specific information or questions

- 2014 Tariff Application (July 2013)
 - AESO did not differentiate between load and gen for advancement costs
- 3473-D02-2015 (August 2015)
 - Commission concluded there was a need to address advancement costs to ensure that system upgrades are achieved in a timely and economic manner
- Commission-initiated proceeding (October 2015)
 - Advancement cost application

- The Closure Letter (March 2017)
 - Additional evidence from various Commission proceedings showing “overlap” to be addressed in 2018 Tariff Application
 - Legislative framework
 - Advanced system-related classification of radial transmission projects
 - Load forecasting
- Amended 2018 Tariff Application (August 2018)
 - AESO proposed substantive changes influenced by the Commission findings
 - System Access Service Requests
 - Classification and Allocation of Connection Project Costs

- The Amended 2018 ISO Tariff Application was filed in August 2018
- The AUC issued the Decision on September 22, 2019
- The AESO filed a Compliance Filing on January 31, 2020
- The AESO filed an Amended Refiled ISO Tariff on April 15, 2020
- The AESO expects the AUC will provide a Decision on the Compliance Filing within 90 days of close of record
- The AESO has requested the effective date of the Proposed Tariff to be no earlier than November 1, 2020

Changes to the Connection, BTF and Contract Processes in the Proposed Tariff

- Process changes discussed today will take effect on the effective date of the Proposed Tariff
 - The AESO requested in our Compliance Filing that the effective date be the 1st of the month and at least 30 days after the AUC's decision on the Compliance Filing
 - The AESO requested the effective date of the Proposed Tariff to be no earlier than November 1, 2020



At the time the Proposed Tariff becomes effective:

- Some in-flight projects will be grandfathered under certain provisions of the current ISO Tariff
- All other projects must comply with the provisions in the Proposed Tariff



The following are available on the AESO website:

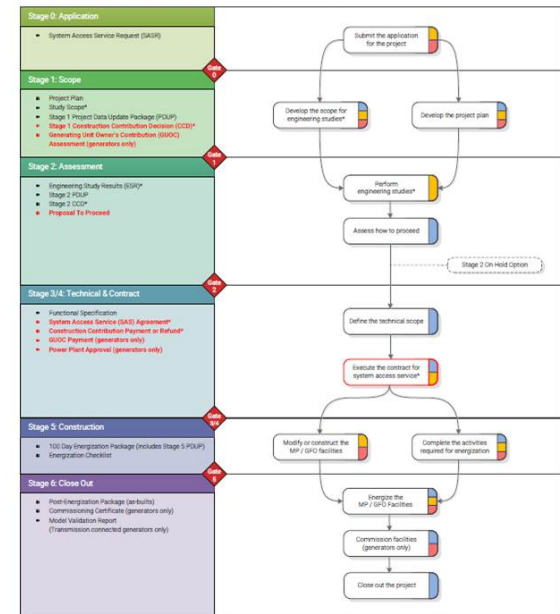
- Draft versions of the Quick Reference Guides (QRGs) summarizing the processes that will be in effect when the Proposed Tariff becomes effective
- Webpages summarizing the changes discussed during the session

Information available on our Initiative page [here](#) or go to aeso.ca -> Stakeholder Engagement -> AESO Initiatives -> Changes to the Connection Process

The Behind The Fence Process

Process Overview

- The Behind The Fence (BTF) Process is followed when a customer is making changes to their existing facilities that the AESO determines will not require the addition or alteration of facilities on Alberta's transmission system, but will require a data submission under Section 502.15 of the ISO Rules, Reporting Facility Modeling Data.
- A Distribution Facility Owner (DFO) generally follows the BTF Process when connecting an energy resource to the distribution system, as this is considered an alteration to the system access stage that the DFO is receiving from the AESO.
- This process follows a gated approach and is designed to move projects through six consecutive stages. Projects must complete all required deliverables for a stage in order to advance to the next stage.
- Below is a list of some of the key deliverables of the BTF Process, and a high-level flowchart of important activities and the parties generally involved. Because of the wide variety of scope and complexity of projects following the BTF Process, some deliverables and activities may not be required. These optional activities are identified with an asterisk (*).
- See Connecting to the grid on the AESO website for more detailed information on the BTF Process.



* May not be required depending on the scope and complexity of the request

Key changes introduced by the Proposed Tariff

1. Critical information
2. System Access Service (SAS) Agreement
3. Generating Unit Owner's Contribution (GUOC)
4. Project Inclusion Criteria
5. ISO preferred alternative
6. Adjusted Metering Practice for DFOs

1. Critical information – System Access Service Request (SASR)

Current Tariff	Proposed Tariff
Not included in current Tariff	<ul style="list-style-type: none">• Critical information consists of information such as in-service date (ISD), location, and capacity• Will be indicated on the SASR• Changes require a SASR amendment



Why make this change?

By clearly defining critical information in the Proposed Tariff, there is improved accuracy for the AESO and clarity for market participants of the impacts of changing this information.

1. Critical information (SASR)

- Critical information is required to respond to the SASR and consists of information such as ISD, location of facility, and capacity (MW)
 - SASR and Change Proposal templates will be updated to clearly indicate all critical information
- Changes to critical information will require the market participant to request an amendment to the SASR via a Change Proposal
 - The Change Proposal process remains unchanged.
 - The AESO evaluates the Change Proposal and determines if the change requires revised connection studies and a revised connection alternative.
 - Possible SASR cancellation, or NID application or NID approval cancellation depending on the impact of the change.

1. Critical information (SASR) - Grandfathering

- No Grandfathering for critical information
- For in-flight projects, the information provided in the SASR or the most recently approved Change Proposal will be considered “critical information”
- In-flight projects continue to follow the Change Proposal process for any changes to their project information

- In addition to the Tariff-related changes discussed above (i.e. critical information), we are making other improvements to the SASR for clarity
- The updated SASR will be published when the Proposed Tariff becomes effective

Highlights of the improvement:

- Better flow and organization of the content
- Clarity for generation and energy storage projects

2. System Access Service (SAS) Agreement – Timing

Current Tariff	Proposed Tariff
<ul style="list-style-type: none">• SAS is signed prior to energization and effective the 1st of the month of energization (ISD)• With the SAS signed late in the process there is little impact if the project is inactive or the ISD is delayed	<p><u>Connection Projects:</u></p> <ul style="list-style-type: none">• SAS is signed (executed) prior to NID filing• SAS is effective upon P&L (unless the SAS contains conditions precedent) <p><u>BTF and Contract Projects:</u></p> <ul style="list-style-type: none">• SAS is executed prior to completing BTF Stage 3/4 or Contract Stage 3/4/5• SAS is effective upon execution <p>In all cases:</p> <ul style="list-style-type: none">• The contract capacity start date remains the 1st of the month of energization (ISD)



Why make this change?

Provides project certainty for the AESO and stakeholders by requiring earlier execution of SAS agreement.

2. SAS Agreement – Conditions Precedent for Connection Projects

- Prior to executing the SAS agreement, the market participant can request that the AESO include “conditions precedent” in the SAS agreement
 - “Conditions precedent” include regulatory approvals and non-financial matters that could cause a delay to the project
 - This does not include approvals by the AUC
- If “conditions precedent” are included in the SAS agreement, then the effective date of the SAS agreement will be upon the resolution of those conditions, up to 1 year after P&L has been granted.

2. SAS Agreement – Executed vs. Effective

- For an executed SAS Agreement, changes to the contract capacity start date or MW may be amended without financial repercussions
- For an effective SAS Agreement, changes to the contract capacity start date or MW may result in the following:
 - Loss of a portion of the GUOC refund for STS contracts
 - Assessment of a Payment In Lieu Of Notice or paying the DTS rate on the original contract capacity start date for DTS contracts
- Changes to critical information which appears on the SAS Agreement (such as contract capacity start date and MW) will require the market participant to request an amendment to the SASR via a Change Proposal
 - Any change to critical information may result in termination of the SAS agreement and cancellation of the SASR

2. SAS Agreement – Obligations

- The AESO will provide system access service up to the requested contract capacity for the scheduled contract capacity start date

Subsection 2.2(2) of the Proposed Tariff

“The ISO must provide system access service up to the contract capacity of the market participant.”

Section 7 of Proforma for Rate STS

“...the ISO must provide system access service under Rate STS to the market participant at the point of supply at the contract capacity...”

2. SAS Agreements – Operational Limitations

- Provision of system access service is always subject to all real-time operating rules and procedures upon energization

Subsection 2.2(3) of the Proposed Tariff

*“The ISO **may limit, reduce or interrupt system access service** in accordance with any ISO rule, or due to abnormal operating conditions, which include conditions where transmission facilities are out of service, emergency conditions exist, construction or commissioning of transmission facilities occurs or transmission facility maintenance cannot be coordinated with planned outages of a generating unit or an aggregated generating facility.*”

3. Generating Unit Owner's Contribution (GUOC) – Timing and calculation



Current Tariff	Proposed Tariff
<p><u>Connection Projects:</u></p> <ul style="list-style-type: none">• Payment due the <i>later of</i> 90 days after P&L or 30 days prior to construction	<p><u>Connection Projects:</u></p> <ul style="list-style-type: none">• Evidence of ability to pay GUOC required prior to NID filing• Payment due 30 days after SAS effective date
<p><u>BTF and Contract Projects:</u></p> <ul style="list-style-type: none">• Payment due 30 days prior to the SAS effective date	<p><u>BTF and Contract Projects:</u></p> <ul style="list-style-type: none">• Payment due 30 days after SAS effective date
<p>In all cases:</p> <ul style="list-style-type: none">• Market participant pays GUOC• GUOC is based on STS• Current GUOC rates apply	<p>In all cases:</p> <ul style="list-style-type: none">• Generator owner pays GUOC• GUOC is based on Maximum Capability (MC)• New GUOC rates apply



Why make this change?

Provides project certainty for the AESO and stakeholders by requiring earlier payment of GUOC.

3. GUOC calculated using Maximum Capability (MC)

- Paid by the generation facility owner
- Calculated using MC (no longer calculated using STS)
- GUOC is assessed for any generator with a MC greater than 1 MW
- A generator with a MC greater than 1 MW which does not require a SASR is still required to pay GUOC
 - e.g. New 1.5 MW generator that works directly with the AESO's market support team is required to pay GUOC
- GUOC calculation will be separated from the CCD and a separate GUOC Assessment form will be sent to the generation facility owner

3. GUOC Rates

Current Rates from 2014-2015	
Planning Region	Rate
Northwest	\$10,000/MW
Northeast	\$50,000/MW
Edmonton	\$32,500/MW
Central	\$22,400/MW
Calgary	\$10,000/MW
South	\$25,000/MW

Proposed Rates	
Planning Region	Rate
Northwest	\$10,000/MW
Northeast	\$20,000/MW
Edmonton	\$30,000/MW
Central	\$50,000/MW
Calgary	\$40,000/MW
South	\$20,000/MW

- In the Proposed Tariff, the AESO proposed to list the GUOC rates in the Tariff itself, to be updated yearly along with rates and investment levels



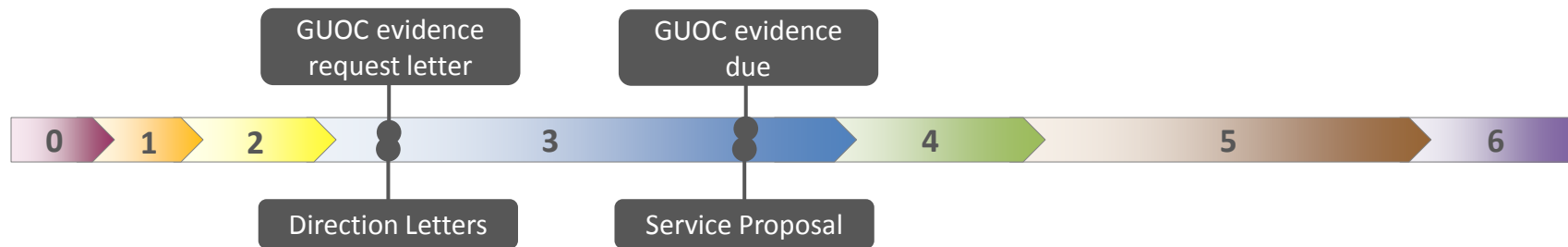
Why make this change?

To encourage generators to locate where there is existing transmission capability.

3. GUOC Evidence for Connection Projects



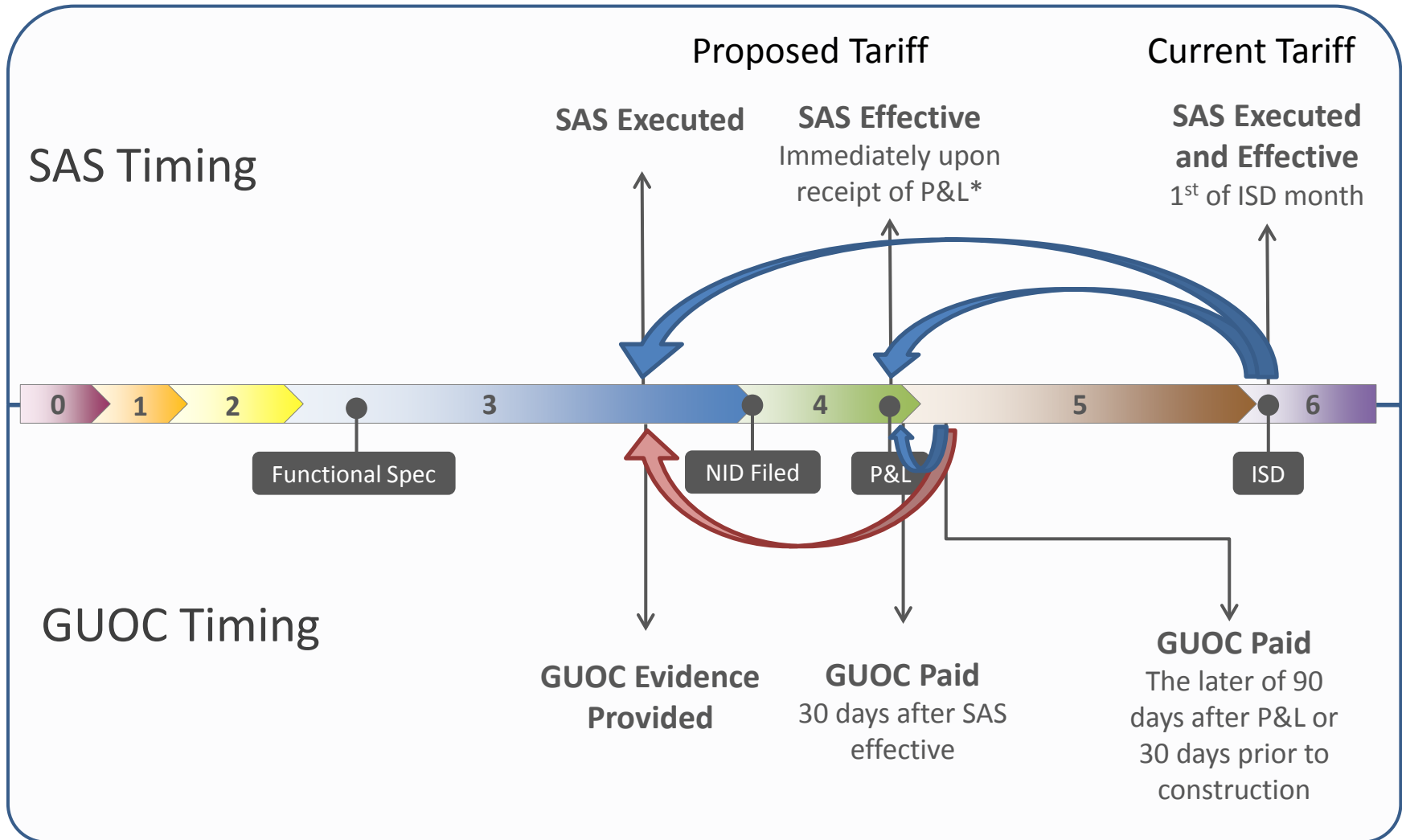
- The AESO will accept evidence from the generator owner that meets the requirements of subsection 8 of Section 103.3 of the ISO rules, *Financial Security Requirements*
 - a letter of credit, a cash collateral deposit or third party written guarantee
- The AESO will issue a letter requesting the GUOC evidence at the same time the Direction Letters are issued
- GUOC evidence will be due on the same due date as the TFO Service Proposal



3. GUOC Evidence and Payment

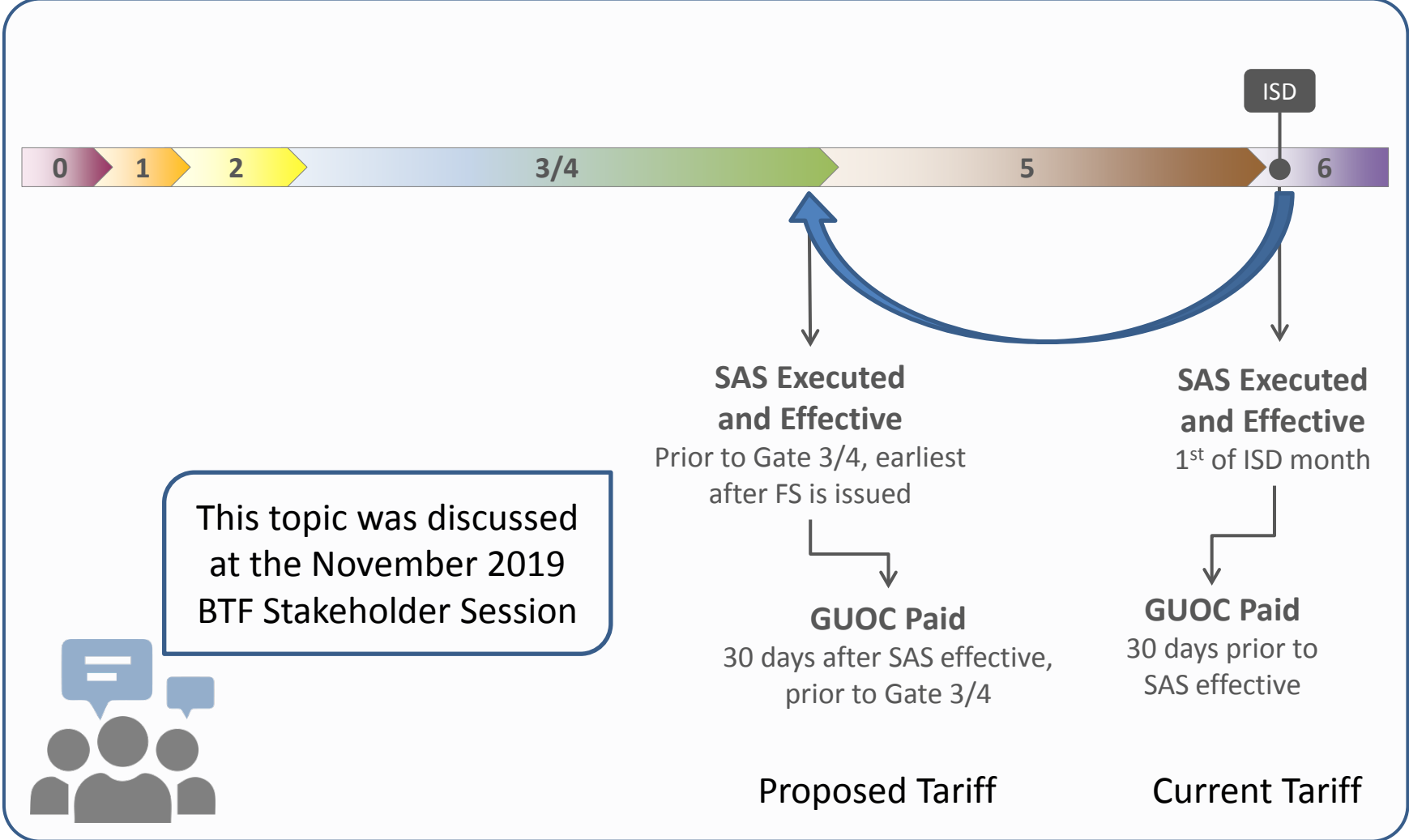
- If GUOC evidence is not provided, the AESO will not file the NID
 - Projects are expected to complete Stage 3 within the maximum timeline outlined in ID #2018-018T
- If GUOC is not paid within 30 days after the SAS agreement is effective:
 - The AESO will assess interest and a late payment charge will apply as indicated in Section 103.7 of the ISO rules.
 - The AESO may rely on (“call up”) the financial security and/or cancel the SASR

SAS Agreement and GUOC Timing – Changes in the Connection Process

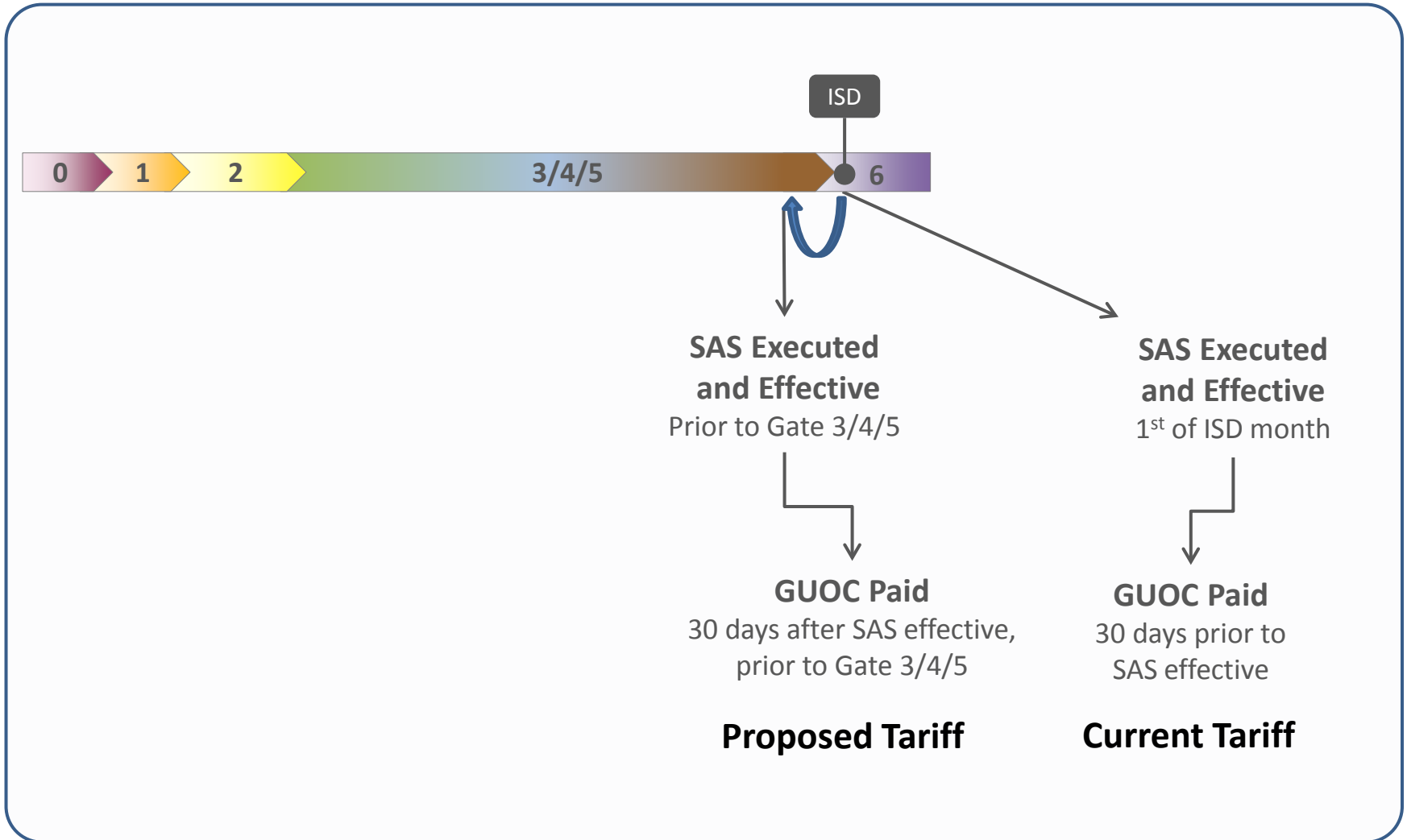


*Unless the SAS contains conditions precedent

SAS Agreement and GUOC Timing – Changes in the BTF Process



SAS Agreement and GUOC Timing – Changes in the Contract Process



Subsection 3.7(6) of the Proposed Tariff

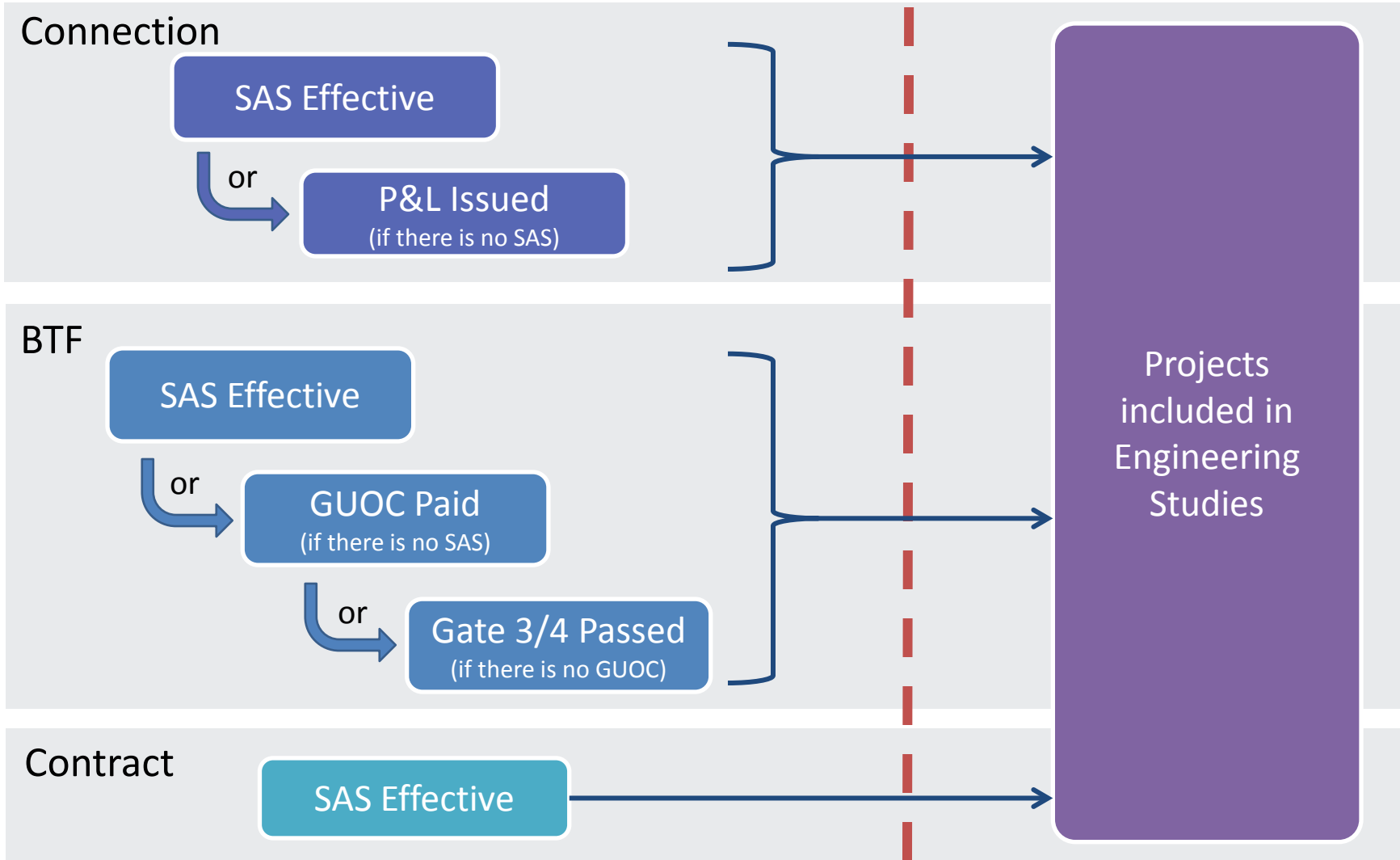
*“The ISO **must include** the critical information of a specific connection project in the ISO’s forecast, transmission system plans and engineering connection assessments when the related System Access Service Agreement for Rate DTS or Rate STS **becomes effective...**”*

- Project Inclusion is used to determine which projects in an area are included in a specific technical study assessment for a project
- Ensures that the AESO can provide system access service in accordance with the SAS Agreement

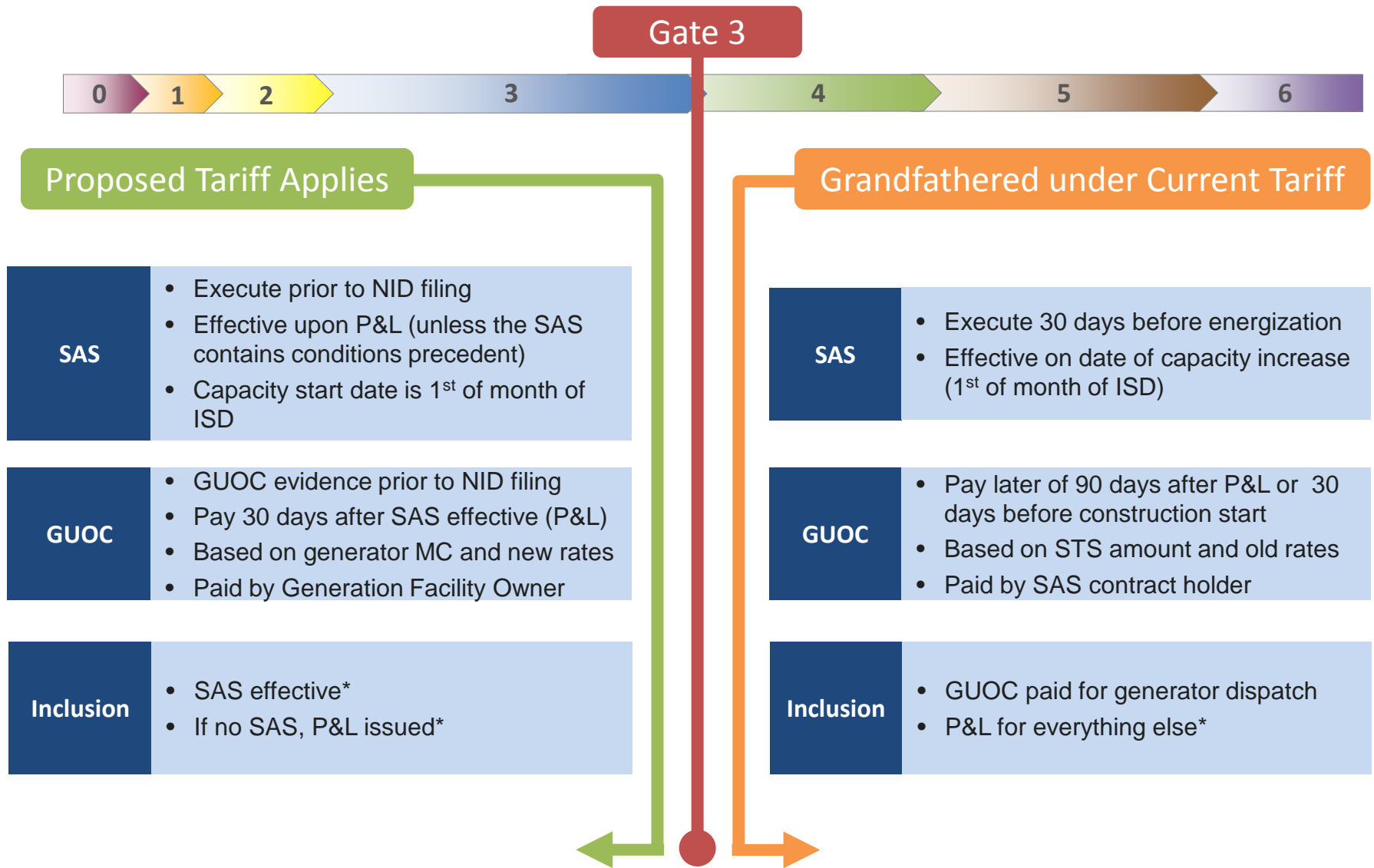
- Project inclusion means:
 - The project's capacity is accounted for in other projects' studies
 - The project's connection alternative is modelled in the AESO's study cases
 - The project is dispatched in other projects' studies based on the forecast
- The AESO utilizes additional criteria for project inclusion when there is no SAS Agreement

4. Project inclusion criteria

Project Inclusion Criteria Met

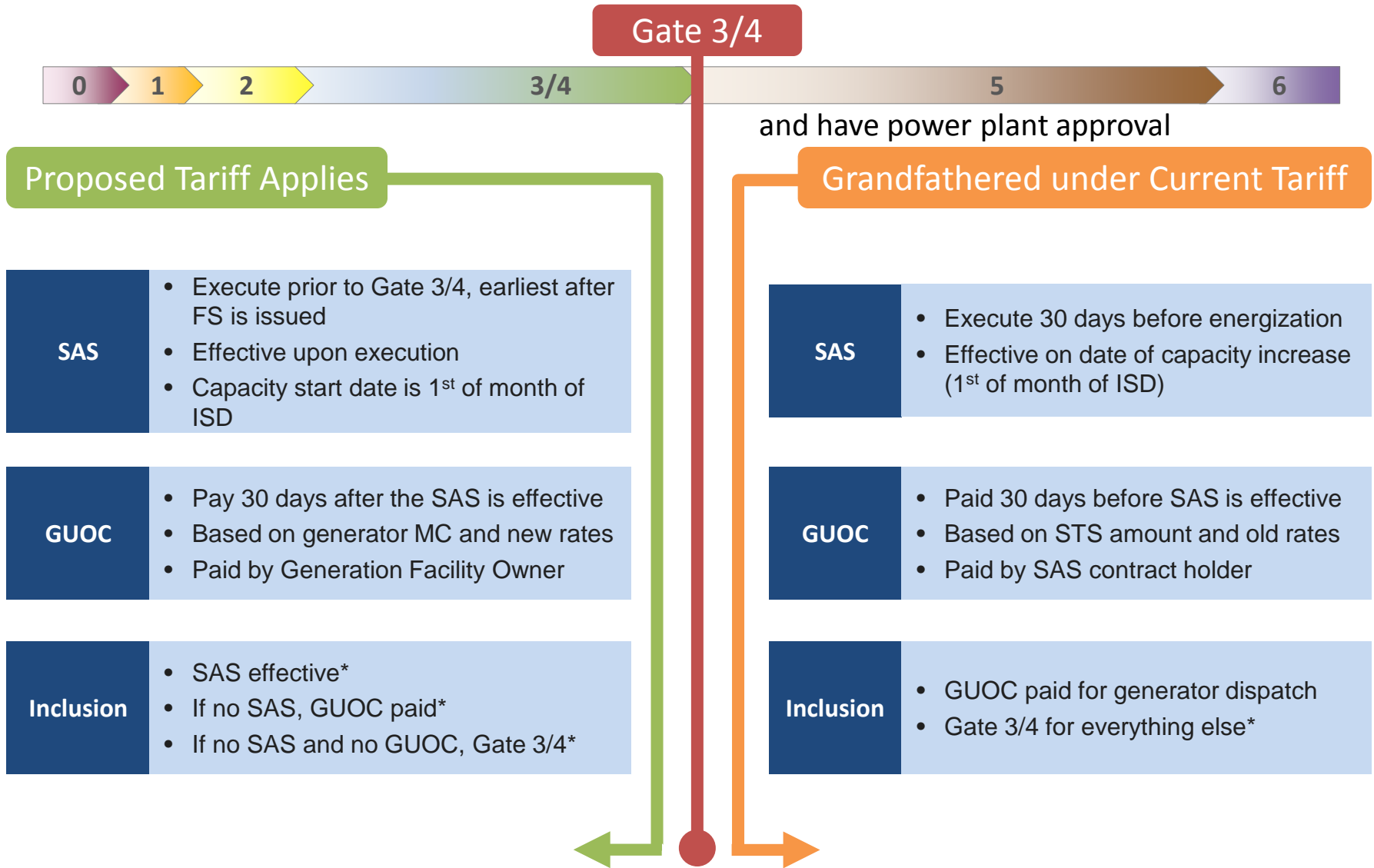


Grandfathering SAS/GUOC/Project Inclusion – Connection Projects



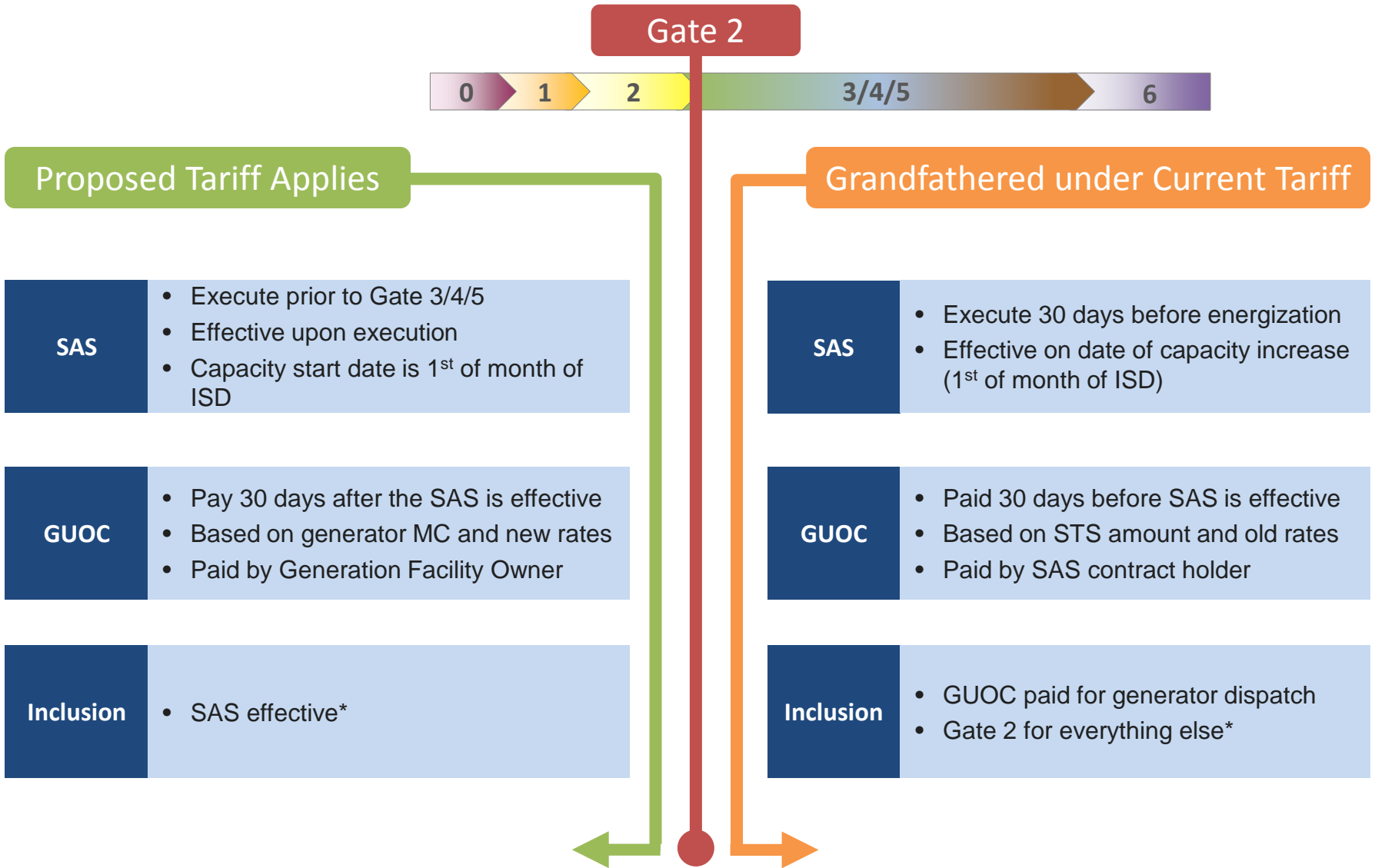
*includes all dispatch/forecast and topology, unless generation dispatch is specifically identified

Grandfathering SAS/GUOC/Project Inclusion – BTF Projects



*includes all dispatch/forecast and topology, unless generation dispatch is specifically identified

Grandfathering SAS/GUOC/Project Inclusion – Contract Projects



*includes all dispatch/forecast and topology, unless generation dispatch is specifically identified

Transitional Election Process for SAS and GUOC

- Eligible projects may elect to opt out of grandfathering and comply with the applicable provisions of the Proposed Tariff for execution of the SAS agreement and payment of GUOC
- Projects that do not elect to follow the Proposed Tariff will be automatically grandfathered under the applicable provisions of the Current Tariff and are not required to take any action
- This is a one-time choice and the election period is open for 14 days
- Allows eligible projects the opportunity to meet the project inclusion criteria earlier
- Projects that are eligible for this option are:
 - Connection generation projects in Stage 4 or 5
 - BTF generation projects in stage 5 with power plant approval
- A project is not eligible if GUOC has already been paid

Transitional Election Process for SAS and GUOC

Election

- 14 day election period starting on the effective date of the Proposed Tariff
- Send Election Form to customer.connections@aeso.ca
- Provide evidence of ability to pay GUOC (provided by the GFO, based on MC and the new rates)

Assessment

- The AESO conducts a technical assessment to determine the project or combination of projects which allow the most Maximum Authorized Real Power (MARP) to connect in an area without causing N-0 violations
- For projects that meet the AESO's criteria, the project inclusion criteria is met at the end of the assessment

SAS Agreement

- The market participant has until the 90th day after the Proposed Tariff effective date to sign the SAS agreement
- The SAS is effective upon signing (or upon P&L, for projects in Stage 4)

GUOC

- GUOC is due within 30 days after the SAS is effective
- Provided by the GFO, based on MC and the new rates

More details will be available on the AESO website by the session date.

5. ISO preferred alternative

Current Tariff	Proposed Tariff
<p>AESO accepts connection proposal after all deficiencies have been addressed</p>	<ul style="list-style-type: none">• Documents the AESO's responsibility to select the preferred alternative• Documents the factors taken into account when selecting the AESO's preferred alternative• Clarifies the options available to the market participant when studies show that a system transmission facility upgrade is required for their connection to address violations



Why make this change?

To provide clarity to market participants on how the AESO selects the preferred alternative.

- The AESO's preferred connection alternative takes into account:
 - The overall long-term cost of the connection alternative including, as applicable:
 - i. if the SASR is submitted by the DFO, all distribution costs;
 - ii. costs classified as participant-related
 - iii. costs associated with system transmission facilities
 - iv. all other transmission costs (including the costs of any non-wires solutions, land use costs, etc.)
 - The effect of the connection alternative on the transmission system via a technical assessment

5. ISO preferred alternative – Generation Projects with N-0 or N-1 issues

- For Generation projects, the following factors are considered:
 - If N-1 issues are identified:
 - The AESO determines what the operational measures are to manage the constraint (e.g. RAS)
 - The market participant can choose to reduce their contract capacity
 - If N-0 issues are identified:
 - The AESO identifies the transmission solution to address the N-0 concerns; this could be an existing transmission plan in the area
 - The market participant can choose to reduce their contract capacity
 - If acceptable to the AESO (with T-Reg exceptions), connect the project with temporary congestion until transmission solutions are in place to address the N-0 issues

5. ISO preferred alternative – Load Projects with N-0 or N-1 issues

- For Load projects, the following factors are considered:
 - If N-0 and N-1 issues are identified that need to be addressed through system upgrades, the market participant has the following options:
 - Pay advancement costs for system components. Payment is due within 30 days after DTS agreement becomes effective (P&L)
 - OR**
 - Reduce their contract capacity allowing for a minimum of 5 year load area growth to happen.
 - OR**
 - Wait a minimum of 5 years to connect and avoid paying the advancement costs
- The AESO will issue a letter with the appropriate options and the market participant will select an option and acknowledge the letter

5. Grandfathering – ISO preferred alternative

- Projects that have passed Gate 3 of the Connection Process will be grandfathered because the NID has been filed
- Projects that have not passed Gate 3 (no NID filed) of the Connection Process will be given the options outlined in the previous slides in the event that studies identify N-0 or N-1 issues

- The AESO will issue a “Proposal to Proceed” Letter at the end of Stage 2 confirming the preferred alternative
 - The market participant acknowledges the letter in order to proceed into Stage 3
- Stage 2 deliverables will continue to be used to determine the AESO’s preferred alternative, but will no longer be packaged into a Connection Proposal
- Similarly, for BTF and Contract projects, a Proposal to Proceed letter will be issued at the end of Stage 2 confirming the project can proceed



Why make this change?

To provide better alignment of roles and responsibilities in Stage 2.

Connection Proposal

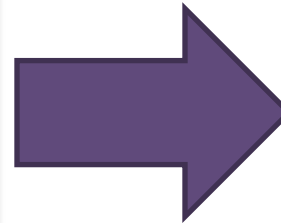
Engineering Study Report

**includes the AESO's preferred alternative*

Cost Estimates

Facility Design

Land Impact Assessment



Engineering Study Report

OOM or NID Cost Estimates

Facility Design

Environment & Land Use
(if required)

AESO Proposal to Proceed

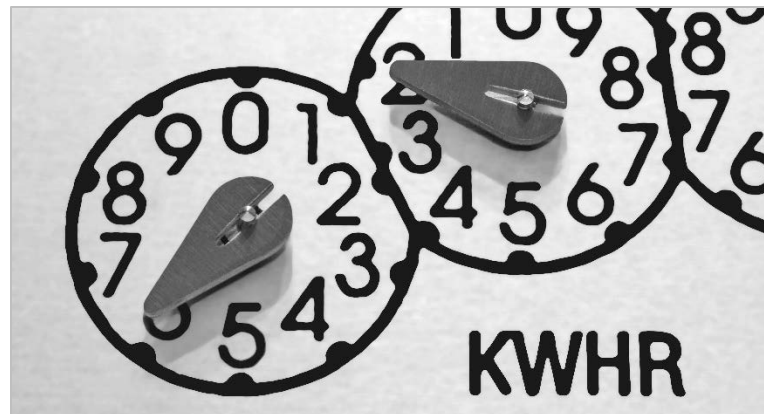
 MP  AESO

- Projects in Stage 1 and in early Stage 2 will follow the new process
 - The Proposal to Proceed Letter will be issued at the end of Stage 2
- Projects in late Stage 2 will follow the current process



6. Adjusted Metering Practice for DFOS

- The AESO proposed an adjusted metering practice (“AMP”) for DFOS in the Amended 2018 ISO Tariff Application and Compliance Filing
- The AUC has initiated a variance proceeding to address issues regarding the proposed AMP and substation fraction methodology



Questions?

**Improvements to the BTF Process
resulting from the Nov. 26, 2019
Stakeholder Session**

- Following the November 2018 stakeholder engagement session, we evaluated the feedback from industry and combined it with an internal review to develop recommendations
- In November 2019, we engaged with stakeholders on the following proposed BTF process recommendations:
 1. Increased GFO involvement
 2. Construction Contribution Decision (CCD) timing
 3. Determining target and maximum timelines
 4. Power plant approval timing
 5. System Access Service (SAS) Agreement execution timing
- In January 2020, we posted a summary of stakeholder feedback on the AESO website

- We evaluated the feedback from the November 2019 session and have made adjustments to our original recommendations
- The improvements discussed in the following slides will take effect when the Proposed Tariff becomes effective



1. Formalize Role of Generation Facility Owner

- Improves overall efficiency
- Feedback was positive, no adjustments to proposed change

Documents with GFO involvement	GFO Role
SASR	Provide input to DFO
Kick-off Meeting	Attendee
Project (BTF) Plan	Review and sign-off
Study Scope	Review
Engineering Study Report	Review (optional)
Functional Specification	Review and provide input
Single-line Diagrams (SLDs)	Provide SLDs to DFO
PDUP	Provide input to DFO
GUOC Assessment	Acknowledge
GUOC Invoice	Provide payment
Commissioning Certificate Request	Prepare and submit

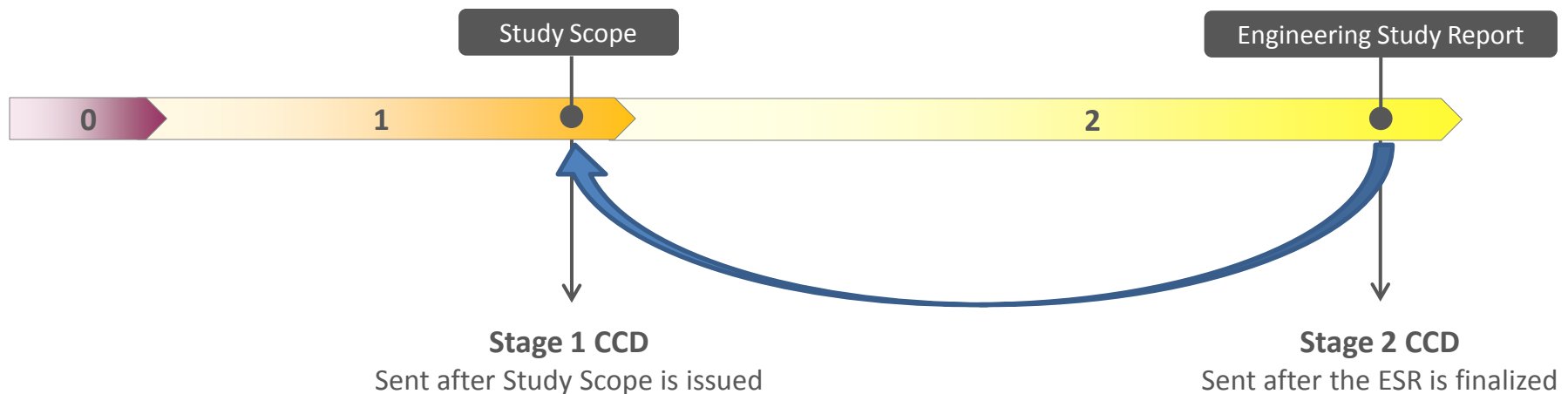
1. Grandfathering – Formalize Role of Generation Facility Owner

As of the effective date of the Proposed Tariff:

- Documents currently underway will not require GFO involvement
- New documents being drafted will require GFO involvement as outlined on the previous slide
- GFOs are required to acknowledge the GUOC Assessment and pay GUOC

2. Construction Contribution Decision (CCD) Timing

- Prepare CCD in Stage 1 to provide earlier visibility of cost
- Feedback was positive, no adjustments to proposed change



Grandfathering: Projects that have completed Stage 1 or are near the end of Stage 1 will be grandfathered

3. Power Plant Approval Timing

- Two options were presented for power plant approval: Gate 2 Requirement OR Gate 3/4 Requirement
- Feedback was positive for Option 2 – power plant approval will be a Gate 3/4 requirement



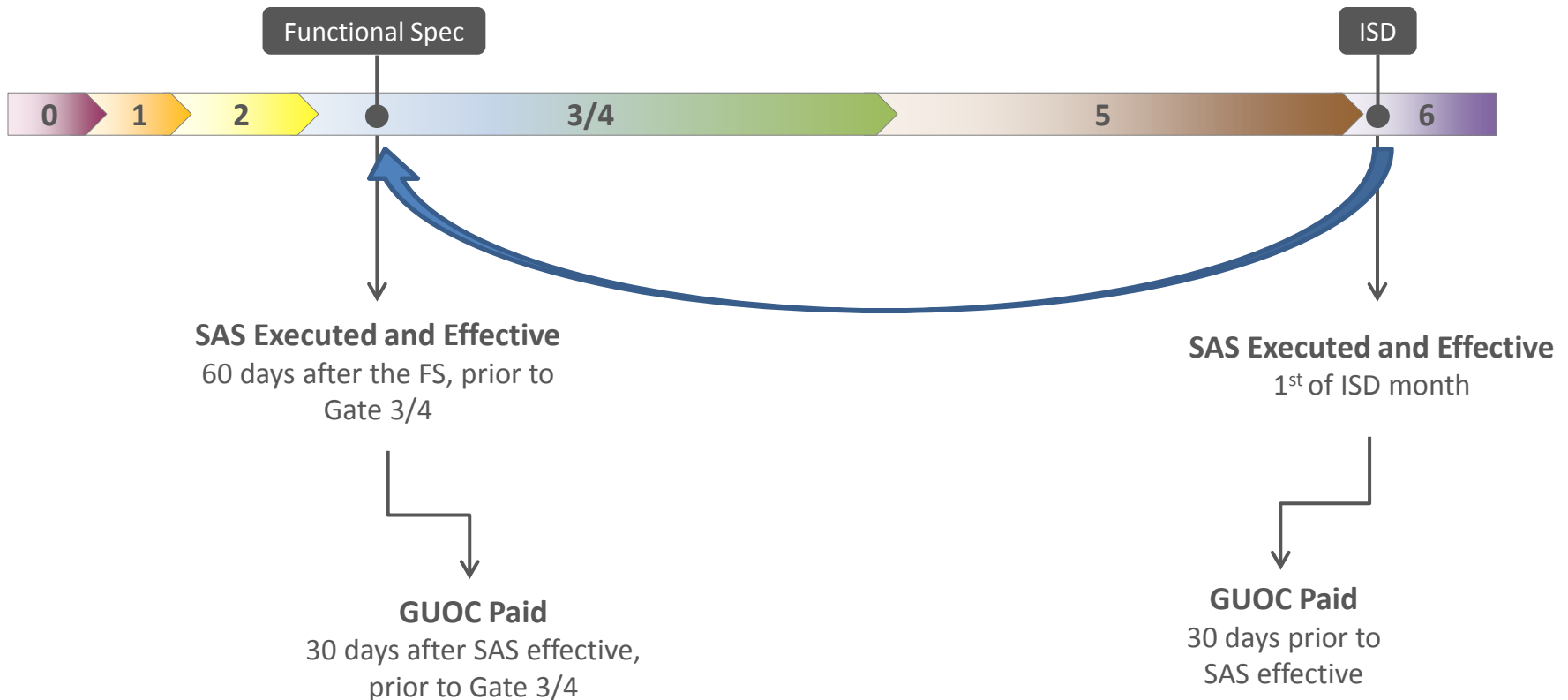
3. Power Plant Approval Timing - Grandfathering

As of the effective date of the Proposed Tariff:

- Projects that are in stage 5 and have received power plant approval, will remain as is
- Projects that are in stage 5 but do not have power plant approval will be reassigned into stage 3/4 of the BTF Process
 - Ensures projects align with the new gate 3/4 requirement of power plant approval
 - Allows projects to sign the SAS and pay GUOC on a timeline that works for them, rather than immediately after the Proposed Tariff is effective

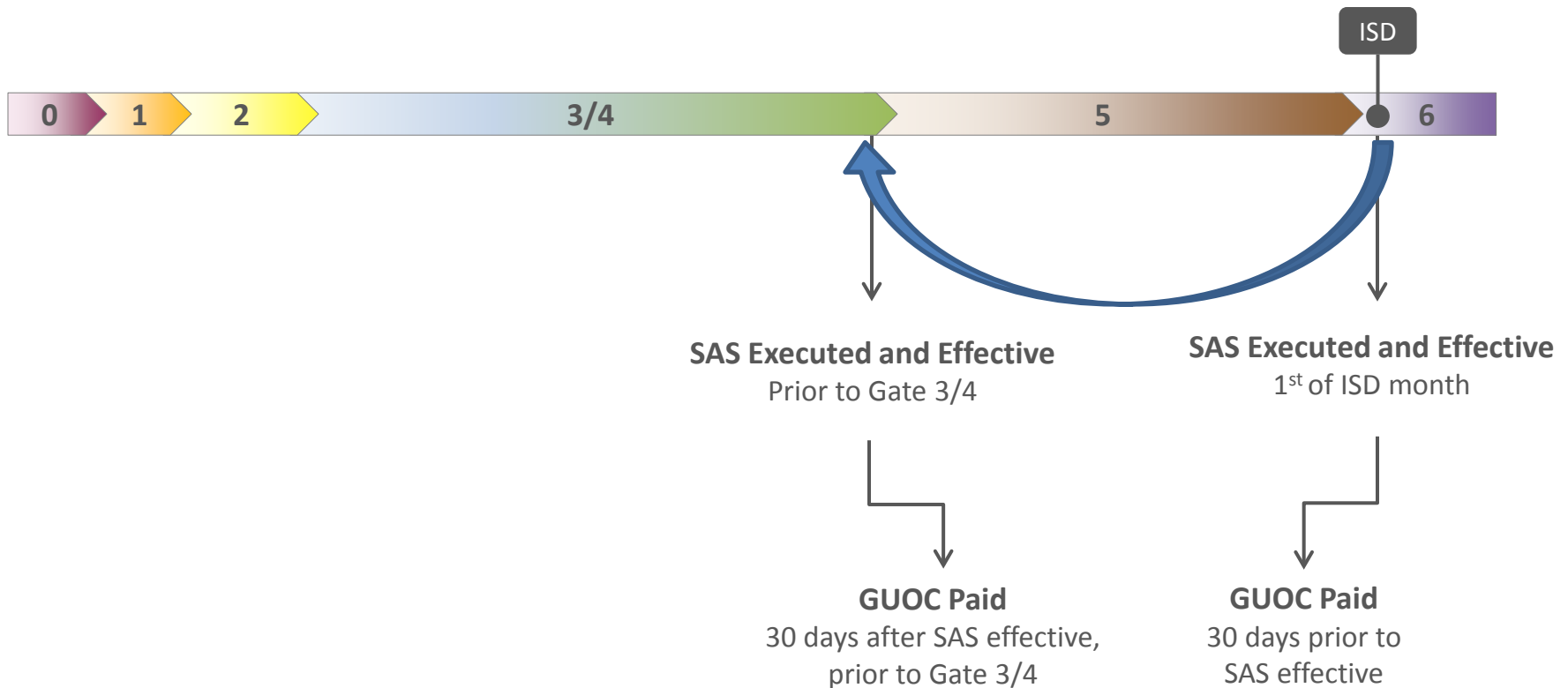
4. SAS Agreement Timing - Proposed

- The AESO's original recommendation was to sign (execute) the SAS Agreement 60 days after issuing the Functional Specification



4. SAS Agreement Timing - Result

- Feedback suggested we move the timing further out in the process. The SAS Agreement will now be executed as a Gate 3/4 requirement.



5. Target and Maximum Timelines - Proposed



- The AESO’s original recommendation was the following target and maximum timelines for Stages 1 and 2, with a Project Schedule Alignment for Stages 3/4, 5, and 6.

Stage	Target Timeline (Weeks)	Maximum Timeline (Weeks)
1	6	12
2	12	24
3/4, 5, 6	<ul style="list-style-type: none">• Project Schedule Alignment is prepared at beginning of Stage 3/4 and Stage 5.• Can be kept up to date throughout the project.• Change Proposal + Project Schedule Alignment is required for ISD changes.	

5. Target and Maximum Timelines - Result



- Feedback suggested we align timelines closer to connection project timelines. Target timelines are now aligned.
- Target and maximum timelines have been added for Stage 3/4 because the fixed due date for the SAS Agreement has been removed
- Stages 5 and 6 will still have timelines determined by project team

	Stage	Target Timeline (Weeks)	Maximum Timeline (Weeks)
Updated	1	8	16
	2	14	28
New	3/4	26	52
	5, 6	<ul style="list-style-type: none"> • Project Schedule Alignment is prepared at beginning of Stage 3/4 and Stage 5. • Can be kept up to date throughout the project. • Change Proposal + Project Schedule Alignment is required for ISD changes. 	

5. Grandfathering – Target and Maximum Timelines

As of the effective date of the Proposed Tariff:

- Target and maximum timelines will start for all new and active projects, regardless of how much time has elapsed in their current stage.

Example

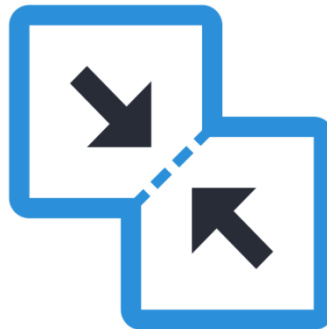
A project has already been in Stage 2 for 8 weeks. When the new Tariff becomes effective, the project now has an additional 14 weeks to complete Stage 2, up to a maximum of 28 additional weeks.

Questions?

Enhancements to Project List

- Introduced in 2010 with the new Connection Process
- The Project List included all active Connection projects
 - Implemented for transparency
- The Queue included any projects past gate 2
 - Gate 2 was the inclusion criteria for studies in 2010
 - Queue position was used for RAS activation/utilization
- The Project List and Queue have remained largely unchanged since 2010, while other practices have evolved
 - Gate 2 is no longer the criteria for inclusion
 - RAS is now a function of reliability mitigation and market impact (i.e. the generator which most effectively mitigates the constraint)

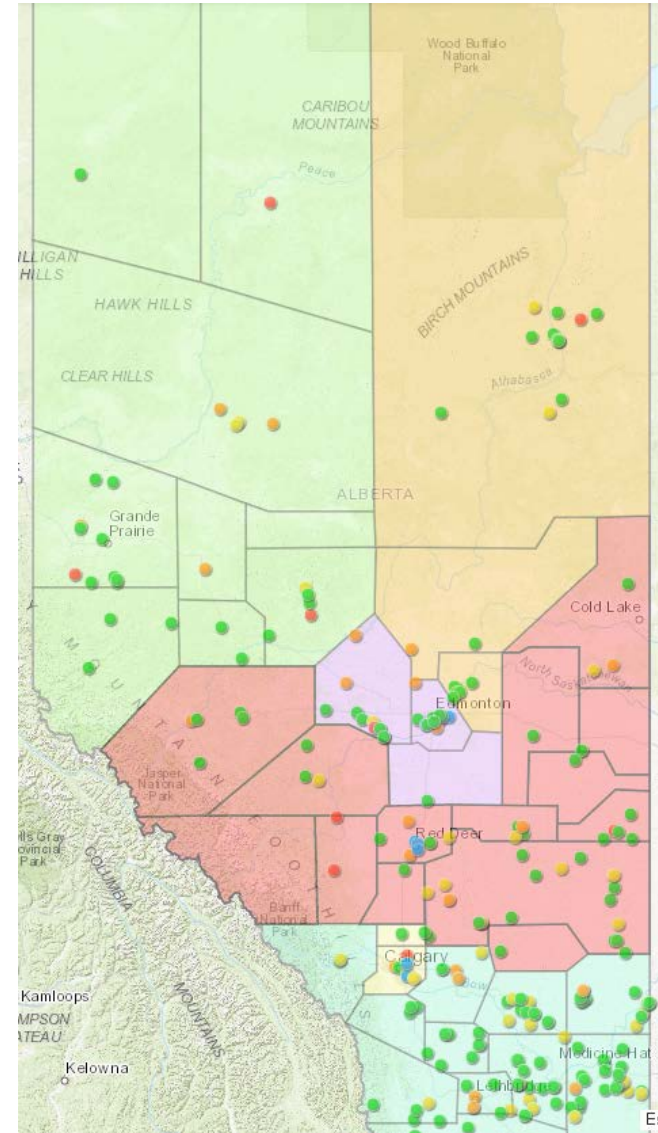
- The Project List and Queue are being merged into one enhanced Project List
 - The queue no longer serves the initial intended purpose, and creates confusion
- The new Project List will contain a number of improvements to ensure it provides all the required information and remains a valuable tool for stakeholders



- The AESO has been collecting feedback on how stakeholders are using the Project List and Queue
 - Feedback gathered at stakeholder sessions
 - Individual customer interactions
 - Project List & Queue survey (Feb 2020)
- We have evaluated the feedback and are proposing some enhancements to the Project List such as:
 - Column indicating when the project inclusion criteria is met
 - Project statuses (active, on hold, ISD under review)
 - Displayed on an interactive map

Interactive Project Map

- Displays project list in geographic format within AESO Planning Areas and Regions
 - Display projects by Status, Fuel Type, Stage, or Inclusion Status
 - Navigate/zoom to project locations in the map
 - See project list information as a pop-up for each project
- Interactive map tools
 - Search specific projects by name/number
 - Filter projects shown by Type, Fuel, Stage, Inclusion Status, STS/DTS MW values
 - Measure distance/area within the map
 - Change map background to see projects overlaid on satellite imagery



- We want your feedback to ensure the improvements are appropriately addressing the challenges we heard
- Prototype of Project List and Map are available for you to test along with more information and user guides
- Comment matrix now open to provide feedback until October 16, 2020
- Stakeholder comments will be shared on the AESO website
- We will review the feedback and determine next steps



Information available on our current project page [here](#)

Other Improvements

- Using an online portal to share Critical Energy Infrastructure Information (CEII) with market participants
 - Improvement was launched on Feb. 21, 2020
- ID #2020-016 *Guideline for T-tap Connections* (May 2020)
 - Outlines the key factors the AESO takes into consideration
- Updating Energization Package Requirements document to clarify roles and responsibilities (targeting Nov. 1, 2020)
 - Will issue Energization Authorization Letter prior to energization instead of the Energization Checklist
- Contract Management System (targeting Nov. 1, 2020)
 - SAS Agreements and CCDs will be generated, shared, and signed through this online tool

- Updated to include much of the content discussed today
- Draft will be available on the AESO website after the AUC issues a decision
- Will be effective when the Proposed Tariff is effective

Highlights of the improvement:

- Includes details about SAS and GUOC timing
- Includes project inclusion criteria
- Includes stage target and maximum timelines
- And much more

Important reference information



- Connecting to the Grid [webpage](#)
- Webpages summarizing the changes discussed today are now available
- Draft version of ID #2018-018T *Provision of System Access Service and the AESO Connection Process* will be available after the AUC issues a decision

Connecting to the grid

The Connection Process

The Connection Process is the AESO's process used to connect projects initiated by market participants to Alberta's transmission system. The following information is provided to assist market participants in connecting to the grid in a timely manner.



[Read about the AESO Connection Process >](#)

Information Document Provision of System Access Service and the Connection Process ID No. 2018-018T

Information Documents are not authoritative. Information Documents are for information purposes only and are intended to provide guidance. In the event of any discrepancy between an Information Document and any Authoritative Document(s) in effect, the Authoritative Document(s) governs.

1 Purpose

This Information Document relates to the following sections of the ISO tariff:

- Section 2 of the ISO tariff, *Provision of and Limitations to System Access Service*;
- Section 3 of the ISO tariff, *System Access Service Connection Requirements*;
- Section 4 of the ISO tariff, *System Access Service Requests*;
- Section 5 of the ISO tariff, *Financial Obligations for Connection Projects*;
- Section 7 of the ISO tariff, *Provision of Information by Market Participants*;
- Section 8 of the ISO tariff, *Construction Contributions for Connection Projects*;
- Section 9 of the ISO tariff, *Changes to System Access Service After Energization*;
- Section 10 of the ISO tariff, *Generating Unit Owner's Contribution*; and
- Section 13 of the ISO tariff, *Financial Security, Settlement and Payment Terms*.

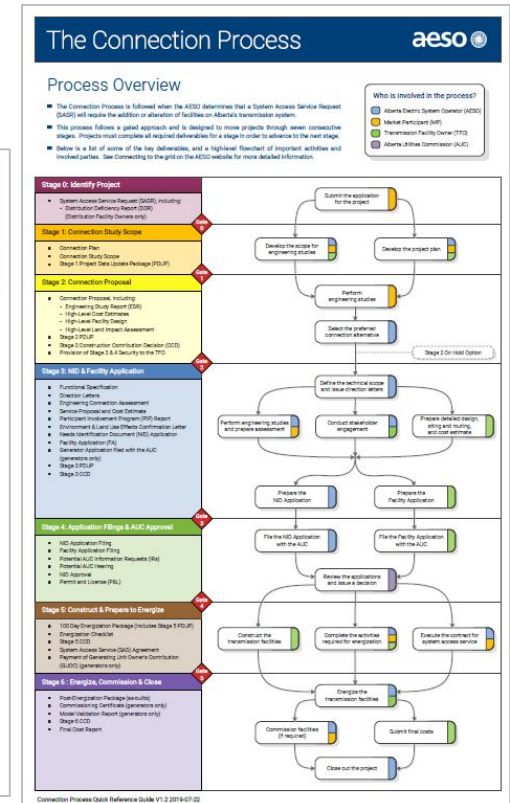
The purpose of this Information Document is to establish and make available to the public the AESO's practices for the efficient and effective processing and making decisions about system access service applications, and performance targets and timeframes with respect to processing and making decisions about system access service applications, as required by section 6(1) of the *Transmission Regulation*.

2 AESO Connection Process

2.1 Overview of the AESO Connection Process

The AESO's connection process facilitates the processing of system access service requests ("SASRs"). The connection process is divided into stages 0 through 6 and follows a gated approach. In order to advance to the next stage in the connection process, projects complete all required deliverables in the timelines shown in Table 1.

Table 1 below provides a summary of the target and maximum stage duration timelines for the connection process.



Questions?

Closing Remarks

- Thank you all for your participation!
- View the stakeholder engagement page to provide your feedback about the enhancements to the Project List and Map
- Process changes discussed today will take effect when the Proposed Tariff is effective
- Effective date to be determined by the AUC

Thank you