

SCE Updates

- Interim Methodology for Rule 21 Screen Q & WDAT Section 5.5.1
- Distribution Group Study
- Queue Cluster Study

February 15, 2024

Agenda

1. Interim Methodology for Rule 21 Screen Q & WDAT Section 5.5.1
2. Distribution Group Study & Queue Cluster Study
Timeline Changes
3. Application Requirements
4. Q&A

Reminders:

Place yourself on mute

Hold questions until the end of presentation

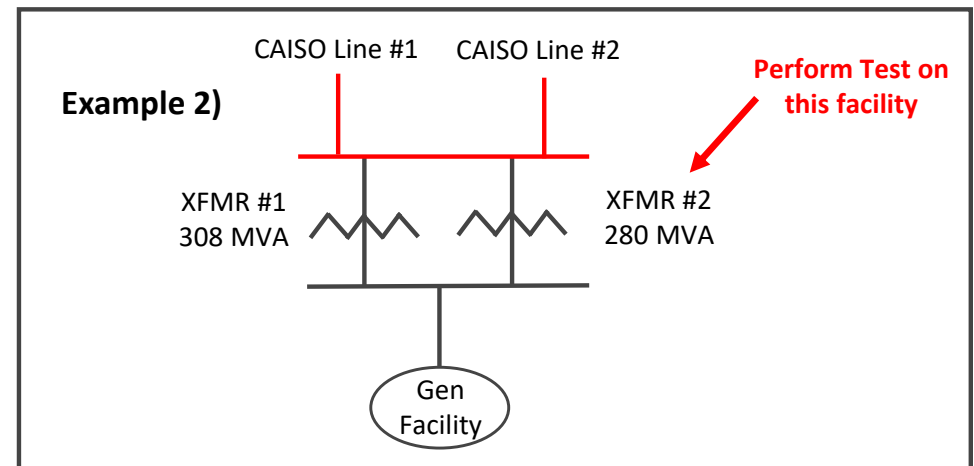
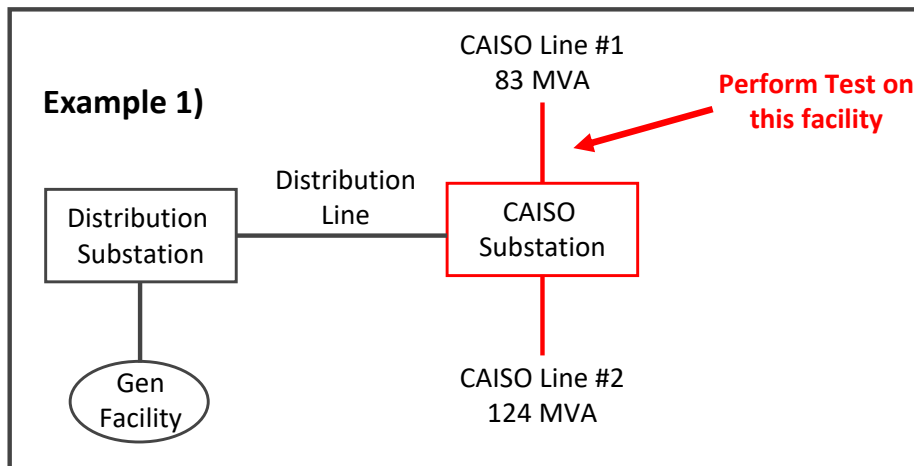
Policy Background

- 2023 - CAISO announced it would not initiate Queue Cluster (QC) 15 Phase I transmission studies, which includes short circuit duty at the sub-transmission level, until QC 14 Phase II is completed.
 - Current estimated delivery for QC 15 Phase I: 2024 Q4 / 2025 Q1
- 2023 - Most Distribution Group Study (DGS) 19 and Independent Study (both WDAT and Rule 21) **projects failed due to previously queued generation at the transmission level that has not completed a Detailed Study.**
 - Failed Electrical Independence Test for the CAISO-Controlled Grid

SCE's Interim Methodology for Assessing Contribution to RNUs ("Interim Methodology")

SCE's Interim Methodology for Assessing Contribution to RNUs

- SCE's methodology will be implemented on an interim basis to assess whether a proposed Generating Facility is not reasonably anticipated to require or contribute to the need for Reliability Network Upgrades (RNU).
- The assessment will consist of Flow Impact, Short Circuit Duty, Transient Stability, and Reactive Support tests.
- If the current Cluster Study base case is unavailable, the latest completed Cluster Study base case will be used.
- The Generating Facility shall pass the Flow Impact Test if the following three criteria are met:
 - (i) The Generating Facility's size, in aggregate with earlier queued Generating Facilities currently being studied through the Independent Study Process (ISP), is 5% or less of the capacity of:
 - 1) the nearest transmission line; or
 - 2) transformer which has a high-side transmission voltage.If multiple transmission lines or transformers are the same electrical distance away from the Generating Facility, the 5% will be based on the facility with the lowest normal rating.
 - (ii) The incremental power flow should not increase the percent loading on the highest loaded transmission facility up to one substation away past 99% loading.
 - (iii) The incremental power flow should not increase the percent loading of any transmission facility in the Cluster Study Subarea past 99.9%.
 - If an earlier queued study hasn't yet determined if RNUs are needed, the new assessment will wait for those results.



Red = CAISO Facility

Black = Distribution Facility

SCE's Interim Methodology for Assessing Contribution to RNUs (Continued)

- **Short Circuit Duty Test**

The Generating Facility shall pass the short circuit test if (i) the combined short circuit contribution from all the active Interconnection Requests in the Independent Study Process in the same study area is less than five (5) percent of the available capacity of the latest circuit breaker upgrade and; (ii) total fault duty on each circuit breaker upgrade identified for the latest Queue Cluster and active Independent Study Process Interconnection Requests in the same study area is less than ninety-five (95) percent of the nameplate capacity of the respective circuit breaker upgrade.

- **Transient Stability Test**

The Generating Facility shall pass the transient stability test if the Generating Facility has requested interconnection in a study area where transient stability issues are not identified for active Interconnection Requests in the latest Queue Cluster or Independent Study Process.

- **Reactive Support Test**

The Generating Facility shall pass the reactive support test if the Generating Facility has requested interconnection in a study area where reactive support needs are not identified as requiring Reliability Network Upgrades for active Interconnection Requests in the latest Queue Cluster or Independent Study Process.

Implementation

- Interim Methodology **will not be applied retroactively and does not revise** any Rule 21 tariff or WDAT requirements
 - Interconnection Requests submitted prior to March 1, 2024 will not be evaluated based on the Interim Methodology
 - Projects that have failed EIT prior to March 1, 2024 must submit **new** Interconnection Request on or after March 1, 2024
 - Rule 21 projects that failed Screen R must go into DGS 20 or withdraw
 - WDAT projects that failed EIT and have been deemed withdrawn cannot apply again at the same POI for 12 months
- Projects will have Interim Methodology performed in order by Queue Position (*i.e.*, **stamp date and time**)
 - Earlier queued projects will impact available capacity on affected CAISO-controlled facilities for all subsequently queued projects, which will directly affect those projects' likelihood of Rule 21 Screen Q or WDAT Section 5.5.1 passage

Factors to Consider Before Submitting Application

- Very limited incremental capacities exist in certain areas
- Stamp date and time (*i.e.*, Queue Position) will not be assigned without an acceptable application package and appropriate fees
- Passing the Interim Methodology does not guarantee interconnection
 - Not triggering Reliability Network Upgrades does not remove the need for Distribution Upgrades and Interconnection Facilities
 - Rule 21 projects still need a qualifying program to receive Permission to Operate

Changes to Distribution Group Study and Queue Cluster Study Timelines

Distribution Group Study 20

- Original application window: March 1 to March 31, 2024
- New application window: **October 1 to October 31, 2024**

Queue Cluster 16

- Original application window: April 1 to April 30, 2024
- Current application window: **April 1 to April 30, 2025**
- **Note: CAISO has applied to FERC for permission not to hold a Queue Cluster in 2024**

Changes to DGS and QC Study timelines are consistent with the provisions in Rule 21 Section E.2.c and WDAT Attachment I Section 4.1

Application Requirements

Application Checklist

Initiating a Request for Interconnection Under WDAT

- Application form: [Appendix 1 - Interconnection Request for a Generating Facility](#).
- A single-line drawing
- Site/plot plan drawing.
- Proof of Site Exclusivity.
- Diagrams, manufacturer's data, and written descriptions of the generating facilities
- Interconnection Request Fees. The application fee (or deposit) required depends on the review/study track the customer chooses. Fees and deposits are calculated using the Wholesale Distribution Access Tariff, Attachment I (also known as the GIP). See Section 4 for the Cluster Study Process, Section 5 for the Independent Study Process.
- **Independent Study Process (ISP)** – Interconnection Study Deposit equal to \$50,000 plus \$1,000 per MW of **gross electrical output** of the Generating Facility, or the increase in electrical output of the existing Generating Facility, as applicable, rounded up to the nearest whole megawatt, up to a maximum of \$250,000.
- New Wholesale Distribution Access Tariff (WDAT) Interconnection Requests can be submitted for processing using [Grid Interconnection Processing Tool \(GIPT\)](#).
- For information about SCE's WDAT interconnection process, please visit [WDAT Interconnection Process](#)

Application Checklist

Initiating a Request for Interconnection Under Rule 21 for Exporting Projects

- Application form: *Rule 21 Exporting Generator Interconnection Request*, [Form 14-918](#)
- A single-line drawing
- Site/plot plan drawing
- Proof of Site Exclusivity
- Diagrams, manufacturer's data, and written descriptions of the generating facilities
- Interconnection request fees. The application review requires a non-refundable fee of \$800.
- *Applicable additional deposit for Detailed Study Process is due at time Interconnection Request is submitted to begin the Application Review. Detailed Study deposit is based on the **Gross Nameplate Rating**, as defined in the tariff, of the Generating Facility.*
- Email complete Interconnection application package to: Rule21@sce.com
- For information about the Rule 21 interconnection process, please visit [Rule 21 Interconnection Process](#)

Questions

*Please use “Raise Hand” feature in Teams.
When called upon, state your name and company.
Please do not ask project-specific questions.*

Should you have any questions after this presentation, please contact us at:
InterconnectionQA@sce.com