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Dear Interconnection Customers,

Per Section 40.10.8 of OATT Attachment HH, the Phase 2 Entry Decision Period for the Transitional Cluster Study process shall commence on November 4, 2025 and will be a ten (10) Business Day period ending on November 18, 2025 at 5:00 pm EST.

A Cluster Study Project will enter the Phase 2 Study if, during the Phase 2 Entry Decision Period, the Interconnection Customer for the Cluster Study Project:

- (i) notifies the NYISO of its election for its Cluster Study Project or CRIS-Only Cluster Study Project to proceed to the Phase 2 Study;
- (ii) satisfies the Readiness Deposit 2 requirements for its Cluster Study Project as determined in accordance with Section 40.10.8.4, except for a CRIS-Only Cluster Study Project which is not required to provide Readiness Deposit 2 to proceed to the Phase 2 Study; and
- (iii) if Interconnection Customer submitted a Site Control Deposit with its Interconnection Request in lieu of demonstrating Site Control in accordance with Section 40.5.5.1.5.1, then the Interconnection Customer must also satisfy the requirements in Section 40.5.5.4 of OATT Attachment HH.

Please note, the Phase 2 Entry Decision Period notification must be made via the NYISO Interconnection Projects Portal. Additionally, the incremental amount due for Readiness Deposit 2 is posted in the NYISO Interconnection Projects Portal under a field titled *Amount due for Phase 2 Entry*. This is the required additional amount an Interconnection Customer will need to provide to enter Phase 2.

Once the Phase 2 Entry Decision Period window closes, any Cluster Study Projects that have not elected to proceed to the Phase 2 Study, via the NYISO Interconnection Projects Portal, will be withdrawn pursuant to Section 40.10.9.1 of OATT Attachment HH. Projects that do

elect to proceed to the Phase 2 Study but fail to (1) submit Readiness Deposit 2 or (2) demonstrate that it is taking identifiable steps to satisfy the necessary regulatory requirements from the applicable federal, state, local and/or tribal entities prior to entering the Phase 2 Study, will also be withdrawn pursuant to Section 40.10.9.1 of OATT Attachment HH.

Any Cluster Study Project withdrawals before or during the Phase 2 Entry Decision Period, whether initiated by the Interconnection Customer or NYISO, will result in a Withdrawal Penalty in an amount equal to 50% of its Study Deposit and 10% of its Readiness Deposit 1. If an Interconnection Customer withdraws or is withdrawn after the Phase 2 Entry Decision Period, increased Withdrawal Penalties may apply as determined based on when in the Cluster Study process the Interconnection Request or CRIS-Only Request withdraws or is deemed withdrawn by the NYISO, as detailed in Sections 40.7.6, 40.10.9, and 40.15.5 of OATT Attachment HH. However, a Cluster Study Project will not be assessed a Withdrawal Penalty if the NYISO determined that the Cluster Study Project cannot move forward due to Physical Infeasibility pursuant to Section 40.7.3 of OATT Attachment HH.

Please refer to the [Phase 2 Entry Decision Period Training Document](#) for instructions on how to complete your Phase 2 Entry Decision prior to November 18, 2025 at 5:00 pm EST.

If you have any questions, please contact the NYISO Stakeholder Services Interconnection Support department at (518) 356-6060 Option 2 or stakeholder_services_ipsupport@nyiso.com.

Regards,
Stakeholder Services

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