

*Draft for Discussion Purposes
Interconnection Issues Task Force – October 20, 2023*

30.5 **Transition Procedures Regarding for Interconnection Requests Submitted Prior to Effective Date of Standard Large Facility Interconnection Procedures**

30.5.1 **Transition Procedures for Interconnection Requests Submitted Prior to Initial Effective Date of Standard Large Facility Interconnection Procedures**
Queue Position for Pending Requests

30.5.1.1 Any Developer assigned a Queue Position prior to the effective date of these Large Facility Interconnection Procedures shall retain that Queue Position.

30.5.1.1.1 If an Interconnection Study Agreement has not been executed as of the effective date of these Large Facility Interconnection Procedures, then such Interconnection Study, and any subsequent Interconnection Studies, shall be processed in accordance with these Large Facility Interconnection Procedures.

30.5.1.1.2 If an Interconnection Study Agreement has been executed prior to the effective date of these Large Facility Interconnection Procedures, such Interconnection Study shall be completed in accordance with the terms of such agreement. With respect to any remaining studies for which a Developer has not signed an Interconnection Study Agreement prior to the effective date of these Large Facility Interconnection Procedures, the ISO must offer the Developer the option of either continuing under the ISO's existing interconnection study process or going forward with the completion of the necessary Interconnection Studies (for which it does not have a signed Interconnection Studies Agreement) in accordance with these Large Facility Interconnection Procedures.

30.5.1.1.3 If a Standard Large Generator Interconnection Agreement has been submitted to the Commission for approval before the effective date of these Standard Large Facility Interconnection Procedures, then the Standard Large Generator Interconnection Agreement would be grandfathered.

30.5.1.2 Transition Period

To the extent necessary, the ISO and Developers with an outstanding request (i.e., an Interconnection Request for which an interconnection agreement has not been submitted to the Commission for approval as of the effective date of these Large Facility Interconnection Procedures) shall transition to these procedures within a reasonable period of time not to exceed sixty (60) Calendar Days. The use of the term “outstanding request” herein shall mean any Interconnection Request, on the effective date of these Large Facility Interconnection Procedures: (i) that has been submitted but not yet accepted by the ISO; (ii) where the related interconnection agreement has not yet been submitted to the Commission for approval in executed or unexecuted form, (iii) where the relevant Interconnection Study Agreements have not yet been executed, or (iv) where any of the relevant Interconnection Studies are in process but not yet completed. Any Developer with an outstanding request as of the effective date of these Large Facility Interconnection Procedures may request a reasonable extension of any deadline, otherwise applicable, if necessary to avoid undue hardship or prejudice to its Interconnection Request. A reasonable extension shall be granted by the ISO to the extent consistent with the intent and process provided for under these Large Facility Interconnection Procedures. This paragraph shall not apply to a Large Facility’s obligation to obtain CRIS in order to qualify as an Installed Capacity Supplier or obtain Unforced Capacity Delivery Rights under the ISO Services Tariff.

30.5.2 New Transmission Provider

If the ISO transfers its control of the New York State Transmission System to a successor transmission provider during the period when an Interconnection Request is pending, the ISO shall transfer to the successor transmission provider any amount of the deposit or payment with

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interest thereon that exceeds the cost that it incurred to evaluate the request for interconnection. Any difference between such net amount and the deposit or payment required by these Large Facility Interconnection Procedures shall be paid by or refunded to the Developer, as appropriate. The ISO shall coordinate with the successor transmission provider to complete any Interconnection Request (including Interconnection Studies), as appropriate, that the ISO has begun but has not completed. If the ISO has tendered a draft Standard Large Generator Interconnection Agreement to the Developer but the Developer has not either executed that interconnection agreement or requested the filing of an unexecuted Standard Large Generator Interconnection Agreement with FERC, unless otherwise provided, the Developer must complete negotiations with the successor transmission provider.

30.5.3 Interim Transition Procedures for Optional Interconnection Feasibility Studies and System Impact Reliability Studies Pending Adoption of the ISO's Revised Interconnection Procedures in Compliance with Order No. 2023

30.5.3.1 Interim Transition Procedures for Large Facilities Eligible for Optional Feasibility Interconnection Studies

30.5.3.1.1 If, prior to December 1, 2023, the ISO has provided Developer and Connecting Transmission Owner with the final scope of a detailed or a limited Optional Interconnection Feasibility Study for Developer's Large Facility and Connecting Transmission Owner has indicated its agreement with the scope by signing and returning it to the ISO pursuant to Section 30.6.2, then the Developer of the Large Facility shall elect: (i) for the ISO to complete the Optional Interconnection Feasibility Study at the detailed or limited analysis level, as applicable, for the Large Facility, (ii) to terminate the Optional Interconnection Feasibility Study for the Large Facility and for the Large Facility to remain in the ISO's interconnection queue pending the adoption of the ISO's revised interconnection procedures in compliance with Order No. 2023, or (iii) to terminate the Optional Interconnection Feasibility Study for the Large

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Facility and to withdraw the Interconnection Request for the Large Facility.

30.5.3.1.2 The Developer of the Large Facility shall inform the ISO of its election on or before December 8, 2023. If the ISO does not receive an election by this date, Developer shall be designated as electing option (ii) of 30.5.3.1.1.

30.5.3.2 Interim Transition Procedures for Large Facilities Eligible for System Reliability Impact Studies or Optional Interconnection System Reliability Impact Studies

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30.5.3.2.1 If, prior to December 1, 2023, the ISO Operating Committee has approved the study scope for an SRIS for a Large Facility pursuant to Section 30.7.3.1 or an Optional Interconnection System Reliability Impact Study (“Optional SRIS”) pursuant to Section 30.10.1, the Developer of the Large Facility shall elect: (i) for the ISO to complete the SRIS or Optional SRIS, as applicable, for the Large Facility, (ii) to terminate the SRIS or Optional SRIS, as applicable, for the Large Facility and for the Large Facility to remain in the ISO’s interconnection queue pending the adoption of the ISO’s revised interconnection procedures in compliance with Order No. 2023, or (iii) to terminate the SRIS or Optional SRIS, as applicable, for the Large Facility and to withdraw the Interconnection Request for the Large Facility.

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30.5.3.2.2 The Developer of the Large Facility shall inform the ISO of its election on or before December 8, 2023. If the ISO does not receive an election by this date, Developer shall be designated as electing option (ii) of 30.5.3.2.1.

30.5.3.3 Interim Transition Procedures for Large Facilities that Have Elected to Proceed with Optional Interconnection Feasibility Study or SRIS But Have Not Satisfied Scope Requirements Prior to December 1, 2023

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30.5.3.3.1 If, by December 1, 2023, the Developer has made a timely election following its Scoping Meeting or the completion of an Optional Interconnection Feasibility Study to proceed to, as applicable, an Optional Interconnection Feasibility Study or SRIS pursuant to Sections 30.6.1 or 30.7.1, but has not met the requirements of Section 30.5.3.1 or

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30.5.3.2 above, then the Developer shall elect: (i) for the ISO to perform an Optional Interconnection Feasibility Study for the Large Facility at a limited analysis level pursuant to Section 30.6.2 if such study has not yet been performed, (ii) for the ISO not to perform an Optional Interconnection Feasibility Study for the Large Facility and for its Large Facility to remain in the ISO's interconnection queue pending the adoption of the revised interconnection procedures in compliance with Order No. 2023, or (iii) for the ISO not to perform an Optional Interconnection Feasibility Study for the Large Facility and to withdraw the Interconnection Request for the Large Facility.

30.5.3.3.2 The Developer of the Large Facility shall inform the ISO of its election on or before December 8, 2023. If the ISO does not receive an election by this date, Developer shall be designated as electing option (ii) of 30.5.3.3.1.

30.5.3.4 Interim Transition Procedures for Large Facilities that Are Not Subject to the Above Transition Requirements

30.5.3.4.1 A Developer with a validated Interconnection Request for its Large Facility that is not subject to the requirements in Sections 30.5.3.1, 30.5.3.2, or 30.5.3.3 shall elect within five Business Days of the completion of the Scoping Meeting or the completion of an Optional Interconnection Feasibility Study for the Large Facility: (i) for the ISO to perform an Optional Interconnection Feasibility Study for the Large Facility at a limited analysis level pursuant to Section 30.6.2 if such study has not yet been performed, (ii) for its Large Facility to remain in the ISO's interconnection queue pending the adoption of the revised interconnection procedures in compliance with Order No. 2023, or (iii) to withdraw the Interconnection Request for the Large Facility.

30.5.3.5 Payment and Refund Requirements for Terminated Studies

30.5.3.5.1 If Developer has provided the ISO with a study deposit for the Optional

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Interconnection Feasibility Study, SRIS, or Optional SRIS for its Large Facility and elects to terminate the study pursuant to Sections 30.5.3.1, 30.5.3.2, or 30.5.3.3, the ISO shall invoice Developer if the actual costs incurred for any study work performed prior to the termination of the study exceed the deposit amount. Developer shall pay the ISO any excess amount within 30 Calendar Days of receipt of an ISO invoice. The ISO shall refund to the Developer any portion of its deposit or study payments that exceed the costs incurred for any study work and any interest actually earned on the deposited amount.

30.5.3.6 Notwithstanding a Developer’s election pursuant to this Section 30.5.3 that the ISO complete an Optional Interconnection Feasibility Study, SRIS, or Optional SRIS for a Large Facility and/or that the Large Facility remain in the ISO’s interconnection queue, the Large Facility will be subject to the new requirements of the revised interconnection procedures, including any additional transition rules, accepted by the Commission in compliance with Order No. 2023 and will have to satisfy such requirements to proceed under the revised interconnection procedures.

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