Subject: Transition Cluster Study Process

Statement: This Technical Bulletin provides information regarding the Transition Cluster Study Process as set forth in Attachment HH to the Open Access Transmission Tariff (OATT).

Details:

DRAFT

Background

This Technical Bulletin addresses the NYISO's Transition Cluster Study Process – the first Cluster Study under the new Standard Interconnection Procedures in Attachment HH to the NYISO OATT. The details of the Transition Cluster Study are set forth Attachment HH to the NYISO OATT and will be incorporated into the NYISO Transmission Expansion and Interconnection Manual.

Transition Cluster Study Process

The NYISO will conduct the Transition Cluster Study Process pursuant to the same requirements as the Cluster Study Process, including using the same *pro forma* forms and agreements, with limited exceptions established in Attachment HH and described below to assist the NYISO and Interconnection Customers with adapting to the new rules.[1]

An Interconnection Customer may submit an Interconnection Request for any project that satisfies the application requirements for the NYISO's Cluster Study Process in the Application Window for the Transition Cluster Study Process. There are no prerequisite studies for a project to enter the Transition Cluster Study. Projects in the NYISO's Queue with ongoing feasibility or system impact studies pursuant to the transition rules in Section 40.3.1 of Attachment HH need not complete their individual ongoing studies before participating in the Transition Cluster Study; however, the Interconnection Customer must submit a new Interconnection Request for such projects in the Application Window and, if its ongoing study is not complete at that time, the Interconnection Customer must terminate such study for its new Interconnection Request to proceed. Projects in the NYISO's Queue that are participating in the Class Year Study for Class Year 2023 or have an ongoing Small Generator facilities study may submit an Interconnection Request for the same project to participate as a Contingent Project in the Transition Cluster Study Process.

The NYISO will open the Application Window for its Transition Cluster Study Process on August 1, 2024, which will commence a 75-day Application Window (in place of the normal 45-day duration).[2] The NYISO will then commence a 90-day Customer Engagement Window for the Transition Cluster Study Process (in place of the normal 70-day duration).[3] The extended timeframes for the transition process will provide the NYISO and Interconnection Customers with additional time to address any issues with the implementation of substantial new process requirements, including the potential for a significant number of project proposals for the transition process. For these reasons, both the NYISO and Interconnection Customers will have 15 business days (in place of the normal 10 business day duration) for the NYISO to

[1] *See* proposed OATT Attach. HH § 40.5.2.
[2] *See* proposed OATT Attach. HH §§ 40.5.1.1, 40.5.3.2.
[3] *See id.* § 40.7.1.2. The Customer Engagement Window time period can be extended to align with the completion of the Class Year Study for Class Year 2023.

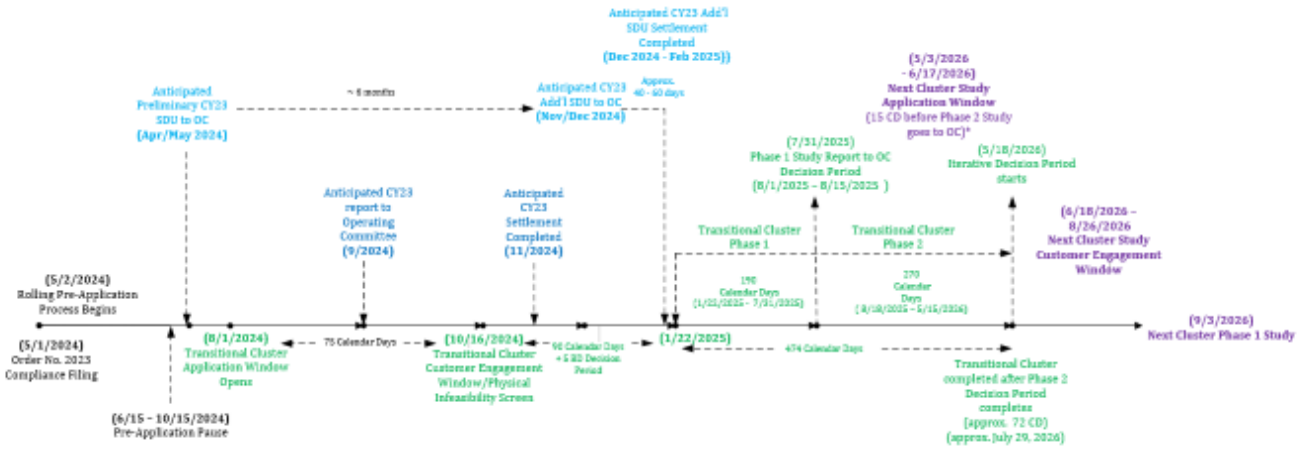
identify deficiencies in the transition Application Window when validating Interconnection Requests and CRIS-Only Requests and for Interconnection Customers to cure such deficiencies.[4]

Transition Cluster Timeframes

The Transitional Cluster Study Process has the same overall structure as the Cluster Study Process, however the timeframes are slightly different. The timeframes for the Transitional Cluster Study are as follows:

- **Application Window:** 75 Calendar Days (versus 45 days in the Cluster Study Process)
- **Customer Engagement Window:** 90 Calendar Days (versus 70 Calendar Days in the Cluster Study Process)
- **Phase 1 Entry Decision Period:** 5 Business Days
- **Cluster Study Phase 1:** 190 Calendar Days
- **Phase 2 Entry Decision Period:** 10 Business Days
- **Cluster Study Phase 2**: 270 Days
- **Final Decision Period:** iterative

Transition Cluster Timeline



Transition Cluster Study Entry Requirements

To enter the Transition Cluster, an Interconnection Customer must submit an Interconnection Request during the Application Window that satisfies the requirements established in Section 40.5 of Attachment HH.

The Interconnection Request requirements include:

1. Non-refundable Application Fee of $10,000 (cash only) ($5,000 for CRIS-only projects)

2. Study Deposit (cash or Letter of Credit):

[4] *See id.* §§ 40.5.7.1.1, 40.5.7.2.2.

Size of Proposed Generating Facility Associated with Interconnection Request	Amount of Deposit
< 80 MW	$100,000
≥ 80 MW < 200 MW	$150,000
≥ 200 MW	$250,000

3. Conceptual one-line diagram that includes:

    a. The Project name, and the Interconnection Customer name on the diagram;

    b. The facility address (specific location – coordinates or closest street address);

    c. The number of inverters or generator units (type, nameplate rating MW and MVA), and configuration of the facility;

    d. The facility's electrical components (i.e., generation, transformers (GSU, PSU, current transformer, and potential transformers), breakers, switches, cables/lines/feeders, compensation, FACTs, auxiliary load, buses, etc.) as described in the modeling data form;

    e. The capability and voltage levels of the electrical components, their connection to each other and to the New York State Transmission System or Distribution System;

    f. The Point of Interconnection (name of the substation name (specify the bus) or transmission/distribution line name and number);

    g. References to other diagram sheets if there is more than one diagram sheet (i.e., use references to indicate how the diagrams are interconnected).

    h. Acronyms used in the conceptual breaker one-line diagram should follow ANSI Standard Device Numbers & Common Acronyms.

4. Completed Interconnection Request must also include a project layout that shows general project layout and location of project in relation to proposed POI, including specific POI

5. Workable individual project models (*e.g.*, short circuit, steady-state, and stability)

6. Attestations (for Generating Facilities greater than 20 MW) required by the final, approved NYSRC Reliability Rule B.5 (currently PRR 151) establishing minimum interconnection standards for Inverter Based Resource (IBR) Generating Facilities based on IEEE Standard 2800-2022

7. Demonstration of Site Control[5]

Once the Interconnection Request is determined to be valid, the Interconnection Customer may be required to provide additional Transmission Owner-specific data.[6]

[5] For more information regarding Site Control requirements, please see the Site Control Technical Bulletin posted on NYISO's website: https://www.nyiso.com/documents/20142/2931465/TB260-SiteControl-v20240611-Final.pdf/e8a7bf3c-adf9-e5db-3a08-07fe258f4be4

[6] *See* proposed OATT Attach. HH § 40.5.7.3.

This Technical Bulletin is expected to be incorporated into the next revision/version of the Transmission Expansion and Interconnection Manual.