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NOTICE OF PROPOSED RULEMAKING

INCLUDING STATEMENT OF NEED & FISCAL IMPACT

CHAPTER 860
PUBLIC UTILITY COMMISSION

FILED: 10/21/2026 8:48 AM
ARCHIVES DIVISION SECRETARY OF STATE

FILING CAPTION: Rulemaking to Amend Division 82 Small Generator Interconnection Rules (AR 688).

LAST DAY AND TIME TO OFFER COMMENT TO AGENCY: 01/18/2027 3:00 PM
The Agency requests public comment on whether other options should be considered for achieving the rule's substantive goals while reducing negative economic impact of the rule on business.

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HEARING(S)
Auxiliary aids for persons with disabilities are available upon advance request. Notify the contact listed above.

DATE: 12/03/2026
TIME: 2:00 PM
OFFICER: Christopher Allwein

REMOTE HEARING DETAILS
MEETING URL: Click here to join the meeting
PHONE NUMBER: 669-254-5252
CONFERENCE ID: 1651970202
SPECIAL INSTRUCTIONS:
Passcode: 411742311

NEED FOR THE RULE(S):

Executive Order 25-29 (EO 25-29) "On Reducing Greenhouse Gas Emissions and Advancing Oregon's Clean Energy Future" issued on November 18, 2025, directs Agencies to "take appropriate actions within their existing authorities to accelerate investment in and deployment of least cost and least risk renewable energy resources, energy storage, demand response, and grid infrastructure[,]" and "develop and implement a coordinated, proactive approach to

streamline land use and environmental reviews, siting and permitting, and interconnection processes for clean energy projects[.]" Successful acceleration of investment in clean energy resources is dependent on timely interconnection.

In Oregon in 2024, the average time between execution of an interconnection agreement and commercial operation date was approximately 54 months for Portland General Electric Company and approximately 41 months for PacifiCorp dba Pacific Power. In comparison the average time nationally for generators < 80 MW was 28 months in 2024, or an average of 39 months when looking only at generators outside of an organized market (ISO/RTO).

The proposed rules related to specific deadlines, timely site visits, specific communications protocols, and options to use third-party consultants for studies and construction should facilitate more timely studies, which ultimately accelerates and streamlines the interconnection process. Staff's proposed rule amendments create a financial incentive to finish construction within a specific time, which should also accelerate the interconnection process, which is a necessary component of accelerating investment in clean energy resources and storage.

DOCUMENTS RELIED UPON, AND WHERE THEY ARE AVAILABLE:

Executive Order 25-29 found online at https://www.oregon.gov/gov/eo/eo-25-29.pdf.

2025 House Bill 2065 found online at https://olis.oregonlegislature.gov/liz/2025R1/Downloads/MeasureDocument/HB2065/Enrolled.

OPUC Docket No. UM 2111, comments and filings: https://apps.puc.state.or.us/edockets/DocketNoLayout.asp?DocketID=22475.

OPUC Docket No. AR 681, comments and filings: https://apps.puc.state.or.us/edockets/DocketNoLayout.asp?DocketID=24813.

OPUC Docket No. AR 683, comments and filings: https://apps.puc.state.or.us/edockets/DocketNoLayout.asp?DocketID=24912.

LBNL's Queued Up: 2025 Edition Characteristics of Power Plants Seeking Transmission Interconnection as of the End of 2024, found online at https://eta-publications.lbl.gov/publications/queued-2025-edition-characteristics.

STATEMENT IDENTIFYING HOW ADOPTION OF RULE(S) WILL AFFECT RACIAL EQUITY IN THIS STATE:

The proposed rules are unlikely to impact racial equity.

FISCAL AND ECONOMIC IMPACT:

The rules are intended to accelerate the process for small generators to interconnect to public utilities. The rules impose more stringent requirements on public utilities on the timing of interconnection studies and construction that may increase the costs incurred by public utilities to interconnect small generators. At least some of the incremental costs are allocable to the interconnecting generators and their costs to interconnect may increase. To the extent interconnections are accelerated, generators will benefit financially as they will be able to commence commercial operation more promptly.

COST OF COMPLIANCE:

(1) Identify any state agencies, units of local government, and members of the public likely to be economically affected by the rule(s). (2) Effect on Small Businesses: (a) Estimate the number and type of small businesses subject to the rule(s); (b) Describe the

expected reporting, recordkeeping and administrative activities and cost required to comply with the rule(s); (c) Estimate the cost of professional services, equipment supplies, labor and increased administration required to comply with the rule(s).

(1) The rules will impose new requirements regarding timing, cost responsibility, and communication protocols for generation interconnection studies and construction of interconnection facilities and upgrades to utility systems that will likely result in additional costs for investor-owned electric utilities operating in Oregon. These costs may be passed along to customers of electric investor-owned utilities in Oregon through increases in rates paid for electricity. State agencies, units of local government and members of the public will be affected to the extent they are customers of investor-owned electric utilities.

Owners and operators of generating resources interconnecting under the new rules may be required to pay higher costs for interconnection if the new timing requirements, or requirements related to site visits, communication protocols, or options for third-party studies, increase the cost to interconnect. However, there are provisions in the rules that may decrease the costs of studies and interconnection for generators if the investor-owned utility does not meet certain deadlines imposed by the rules.

2(a) Small businesses that are owners or operators of generating resources that seek to interconnect with an Oregon investor-owned utility will be directly impacted by the new requirements in the rules. It is not possible to estimate how many such entities may seek to interconnect in the future. As noted above, small businesses that are customers of Oregon investor-owned utilities may be impacted to the extent the investor-owned utilities include costs to comply with the new regulations in rates charged for retail electric service.

2(b) The rules do not impose additional reporting or recordkeeping requirements on small businesses. The rules provide additional opportunity for generators to engage their own contractors for interconnection studies (i.e., third-party studies), which may increase administrative activity on the part of generators/small businesses that utilize options to contract for third-party studies. The rules also impose specific requirements on site visits, which may have some impact on generators' administrative activities.

2(c) The rules specify that the public utility's costs to conduct site visits in accordance with the rules may be passed on to the interconnecting generators, which may be small businesses. Otherwise, the cost "required" to comply with the rules is likely nominal as the rules do not materially increase the administrative obligations of interconnection customers. The rules provide additional opportunity for generators to engage their own contractors for interconnection studies (i.e., third-party studies), which may increase administrative activity and costs for professional services on the part of generators/small businesses that utilize options to contract for third-party studies. However, these activities and any associated costs are voluntary.

DESCRIBE HOW SMALL BUSINESSES WERE INVOLVED IN THE DEVELOPMENT OF THESE RULE(S):

The proposed rules stem from the second phase (Phase II) of a general OPUC investigation into interconnection. Phase II focused on accelerating the process for interconnection of small generators to systems of investor-owned utilities. Associations of generators such as the Renewable Energy Coalition (REC) and Community Renewable Energy Association (CREA), which are made up of generators that include small businesses, and Oregon Solar + Storage Industries Association, which is made up of solar developers, including those that are small businesses, were active participants in the investigation.

WAS AN ADMINISTRATIVE RULE ADVISORY COMMITTEE CONSULTED? NO IF NOT, WHY NOT?

The Commission engaged stakeholders in an informal and formal collaboration process to craft these proposed rules.

RULES PROPOSED:
860-082-0010, 860-082-0015, 860-082-0025, 860-082-0043, 860-082-0060, 860-082-0065

AMEND: 860-082-0010

RULE SUMMARY: Proposed revision limit ability of public utility and interconnection applicant to agree to extension of time to conduct interconnection study unless extension is requested by applicant under OAR 860-082-0060.

CHANGES TO RULE:

860-082-0010
Waiver ¶

(1) Upon request or its own motion, the Commission may waive any of the Division 082 rules for good cause shown. A request for waiver must be made in writing, unless otherwise allowed by the Commission. ¶
(2) A public utility and an applicant or interconnection customer may agree to reasonable extensions to the required timelines in these rules without requesting a waiver from the Commission~~.~~, except for extensions to study timelines, unless the extensions are requested by the applicant as specified in OAR 860-082-0060. ¶
(a) If a public utility and an applicant or interconnection customer are unable to agree to waive a timeline, then the public utility, applicant, or interconnection customer may request that the Commission grant a waiver. ¶
(b) In deciding whether to grant a waiver of a timeline, the Commission will consider the number of pending applications for interconnection review and the type of applications, including review level, facility type, and facility size. ¶
(c) Waiver of a timeline, whether by agreement or Commission order, does not affect an application's queue position.
Statutory/Other Authority: ORS 183, 756, 757
Statutes/Other Implemented: ORS 756.040, 756.060

AMEND: 860-082-0015

RULE SUMMARY: The proposed rule revision adds definitions of “communication protocols,” “limited operations,” and “site visit.”

CHANGES TO RULE:

860-082-0015
Definitions ¶

As used in OAR 860-082-0005 through 860-082-0085:¶
(1) "Adverse system impact" means a negative effect caused by the interconnection of a small generator facility that may compromise the safety or reliability of a transmission or distribution system.¶
(2) "Affected system" means a transmission or distribution system, not owned or operated by the interconnecting public utility, which may experience an adverse system impact from the interconnection of a small generator facility.¶
(3) "Aggregated export capacity" means the total combined export capacity of:¶
(a) A proposed small generator facility;¶
(b) Existing small generator facilities, net metering facilities, FERC jurisdictional generators, and state jurisdictional generators with a nameplate rating greater than 10 megawatts; and¶
(c) Small generator facilities, net metering facilities, FERC jurisdictional generators, and state jurisdictional generators with a nameplate rating greater than 10 megawatts that have pending completed applications with higher queue positions than the proposed small generator facility.¶
(4) "Aggregated nameplate rating" means the total combined nameplate rating of:¶
(a) A proposed small generator facility;¶
(b) Existing small generator facilities, net metering facilities, FERC jurisdictional generators, and state jurisdictional generators with a nameplate rating greater than 10 megawatts; and¶
(c) Small generator facilities, net metering facilities, FERC jurisdictional generators, and state jurisdictional generators with a nameplate rating greater than 10 megawatts that have pending completed applications with higher queue positions than the proposed small generator facility.¶
(5) "Applicant" means a person who has submitted an application to interconnect a small generator facility to a public utility's transmission or distribution system.¶
(6) "Application" means a written request to interconnect a small generator facility with a public utility's transmission or distribution system, which must follow the standard form developed by the public utility and approved by the Commission.¶
(7) "Area network" means a type of distribution system served by multiple transformers interconnected in an electrical network circuit in order to provide high reliability of service. ¶
(8) "Certificate of completion" means a certificate signed by an applicant and an interconnecting public utility attesting that a small generator facility is complete, meets the applicable requirements of the small generator interconnection rules, has passed all applicable federal, state, and local inspection requirements, and is certified as physically ready for operation. A certificate of completion includes the "as built" specifications and initial settings for the small generator facility and its associated interconnection equipment.¶
(9) "Communication Protocols" means a plan established and maintained by utilities that set expectations for utility and applicant communications, including general and electronic mail, phone, and virtual and in-person meetings.¶
(10) "Distribution system" means the portion of an electric system that delivers electricity from transformation points on the transmission system to points of connection on a customer's premises.¶
(~~10~~1) "Energy storage system" means a mechanical, electrical, or electrochemical means to store and release electrical energy, and its associated interconnection and control equipment. For the purposes of these rules, an energy storage system can be considered part of a small generator facility or a small generator facility in whole that operates in parallel with the distribution system.¶
(1~~1~~2) "Export capacity" means the amount of power that can be transferred from the small generator facility to the distribution system. Export capacity is either the nameplate rating, or a lower amount if limited using an acceptable means identified in OAR 860-082-0033.¶
(1~~2~~3) "Fault current" means an electrical current that flows through a circuit during a fault condition. A fault condition occurs when one or more electrical conductors contact ground or each other. Types of faults include phase to ground, double-phase to ground, three-phase to ground, phase to phase, and three-phase.¶
(1~~3~~4) "Field-tested equipment" means interconnection equipment that is identical to equipment that was approved by the interconnecting public utility for a different small generator facility interconnection and successfully completed a witness test under the requirements included in the current version of the public utility's

interconnection requirements handbook before the date of the submission of the current application.¶
(145) "Host load" means electrical power, less the small generator facility auxiliary load, consumed by the customer at the location where the small generator facility is connected.¶
(156) "IEEE 1547" means the standards published in the 2018 edition of the Institute of Electrical and Electronics Engineers (IEEE) Standard 1547, titled "IEEE Standard for Interconnection and Interoperability of Distributed Energy Resources with Associated Electric Power Systems Interfaces" and approved by the IEEE SA Standards Board on February 15, 2018.¶
(167) "IEEE 1547.1" means the standards published in the 2020 edition of the IEEE Standard 1547.1, titled "IEEE Standard Conformance Test Procedures for Equipment Interconnecting Distributed Resources with Electric Power Systems and Associated Interfaces" and approved by the IEEE SA Standards Board on March 5, 2020.¶
(178) "Inadvertent export" means the unscheduled export of active power from a small generator facility, exceeding a specified magnitude and for a limited duration, generally due to fluctuations in load-following behavior.¶
(189) "Interconnection agreement" means a contract between an applicant or interconnection customer and an interconnecting public utility that governs the interconnection of a small generator facility to the public utility's transmission or distribution system and the ongoing operation of the small generator facility after it is interconnected. An interconnection agreement will follow the standard form agreement developed by the public utility and filed with the Commission.¶
(1920) "Interconnection customer" means a person with one or more small generator facilities interconnected to a public utility's transmission or distribution system.¶
(201) "Interconnection equipment" means a group of components or an integrated system provided by an interconnection customer or applicant to connect a small generator facility to a public utility's transmission or distribution system.¶
(212) "Interconnection facilities" means the facilities and equipment required by a public utility to accommodate the interconnection of a small generator facility to the public utility's transmission or distribution system and used exclusively for that interconnection. Interconnection facilities do not include system upgrades.¶
(223) "Interconnection facilities study" means a study conducted by a utility for the customer-generator that determines the additional or upgraded distribution system facilities, the cost of those facilities, and the time schedule required to interconnect the small generator facility to the public utility's distribution system.¶
(234) "Interconnection service" means service provided by an interconnecting public utility to an interconnection customer.¶
(245) "Lab-tested equipment" means interconnection equipment that has been designed to comply with IEEE 1547, tested in accordance with IEEE 1547.1, and certified and labeled as compliant with these IEEE standards at the point of manufacture by a nationally recognized testing lab. For interconnection equipment to be considered lab-tested equipment under these rules, the equipment must be used in a manner consistent with the certification.¶
(256) "Limited export" means the exporting capability of a small generator facility whose export capacity is limited by the use of any configuration or operating mode described in OAR 860-082-0033.¶
(267) "Limited Operations" means operation of a small generator facility at a reduced export capacity, utilizing one or more export control methods as required, permitted under OAR 860-082-0033. ¶
(28) "Line section" means that portion of a public utility's transmission or distribution system that is connected to an interconnection customer and bounded by automatic sectionalizing devices or the end of a distribution line.¶
(279) "Minor equipment modification" means a change to a small generator facility or its associated interconnection equipment that:¶
(a) Includes a change or replacement of equipment that is a like-kind substitution in size, ratings, impedances, efficiencies, or capabilities of the equipment specified in the original interconnection application. Minor variations that do not affect safety, performance, or interoperability are acceptable;¶
(b) Includes a replacement of existing inverters with new inverters that conform to standards in effect at the time of replacement;¶
(c) Includes a reduction in the nameplate rating and/or export capacity of the small generator facility of 10 percent or less; or¶
(d) For changes not specified in subsections (a) through (c) of this definition, the change must not, in the interconnecting public utility's reasonable opinion, have a material impact on the safety or reliability of the public utility's transmission or distribution system or an affected system.¶
(e) Applicants must inform the interconnecting public utility of minor equipment modifications, prior to making the change.¶
(2830) "Nameplate rating" means the sum total of maximum rated power output of all of a small generator facility's constituent generating units and/or energy storage systems as identified on the manufacturer nameplate in Alternating Current (AC), regardless of whether it is limited by any approved means. For a generating unit that uses

an inverter to change direct current energy supplied to an AC quantity, the nameplate rating will be the manufacturer's AC output rating for the inverter(s).¶
(~~29~~31) "Nationally recognized testing laboratory" or "NRTL" means a qualified private organization that performs independent safety testing and product certification. Each NRTL must meet the requirements set forth by the United States Occupational Safety and Health Administration.¶
(3~~0~~2) "Net metering facility" has the meaning set forth in ORS 757.300(1)(d).¶
(3~~1~~3) "Non-export or non-exporting" means when the small generator facility is sized and designed and operated using any of the methods in OAR 860-082-0033, such that the output is used for host load only and no electrical energy (except for any inadvertent export) is transferred from the small generator facility to the distribution system.¶
(3~~2~~4) "Pending completed application" means an application for interconnection of a small generator facility, a net metering facility, or a FERC jurisdictional generator that an interconnecting public utility has deemed complete.¶
(3~~3~~5) "Person" includes individuals, joint ventures, partnerships, corporations and associations or their officers, employees, agents, lessees, assignees, trustees or receivers, as supplemented to include governmental entities.¶
(3~~4~~6) "Point of interconnection" means the point where a small generator facility is electrically connected to a public utility's transmission or distribution system. This term has the same meaning as "point of common coupling" as defined in IEEE 1547.¶
(3~~5~~7) "Power control system" means systems or devices which electronically limit or control steady state currents to a programmable limit.¶
(3~~6~~8) "Primary line" means a distribution line with an operating voltage greater than 600 volts.¶
(3~~7~~9) "Public utility" has the meaning set forth in ORS 757.005 and is limited to a public utility that provides electric service.¶
(~~38~~40) "Queue position" means the rank of a pending completed application, relative to all other pending completed applications, that is established based on the date and time that the interconnecting public utility receives the completed applications, including application fees.¶
(~~39~~41) "Reference point of applicability" (RPA) means a location proximate to the generation where the interconnection and interoperability performance requirements, as specified by IEEE 1547, apply.¶
(4~~0~~2) "Relevant minimum load" means the lowest measured load coincident with the generating facility's production. For solar-only facilities, this is the daytime minimum load (i.e., 10 a.m. to 4 p.m. for fixed panel systems and 8 a.m. to 6 p.m. for PV systems utilizing tracking systems).¶
(4~~1~~3) "Scoping meeting" means an initial meeting between representatives of an applicant and an interconnecting public utility that is conducted to discuss the RPA, to discuss alternative interconnection options; to exchange information, including any relevant transmission or distribution system data and earlier studies that would reasonably be expected to affect the interconnection options; to analyze such information; and to determine the potentially feasible points of interconnection.¶
(4~~2~~4) "Secondary line" means a service line with an operating voltage of 600 volts or less.¶
(4~~3~~5) "Site visit" means a meeting at the proposed location of the small generator facility between representatives of an applicant and an interconnecting public utility that is conducted to address all relevant site issues including, but not limited to, site engineering, permitting, easements, and any other required issues. Site visits may be conducted via drone, if parties agree.¶
(46) "Small generator facility" means a facility that operates in parallel with the distribution system for the production of electrical energy that has a maximum installed instantaneous power production capacity of the completed Facility, expressed in MW (AC), and measured at the Point of Interconnection of 10 MW, when operated in compliance with the Generation Interconnection Agreement and consistent with the recommended power factor and operating parameters provided by the manufacturer of the generator, inverters, energy storage devices, or other equipment within the Facility affecting the Facility's capability to deliver useful electric energy to the grid at the Point of Interconnection,¶
(44~~7~~) "Spot network" means a type of transmission or distribution system that uses two or more intertied transformers protected by network protectors to supply an electrical network circuit. A spot network may be used to supply power to a single customer or a small group of customers.¶
(4~~5~~8) "System upgrade" means an addition or modification to a public utility's transmission or distribution system or to an affected system that is required to accommodate the interconnection of a small generator facility.¶
(4~~6~~9) "Transmission line" means any electric line operating at or above 50,000 volts.¶
(~~47~~50) "Transmission system" means a public utility's high voltage facilities and equipment used to transport bulk power or to provide transmission service under the public utility's open access transmission tariff.¶
(~~48~~51) "Witness test" means the on-site visual verification of the interconnection installation and commissioning as required in IEEE 1547. For interconnection equipment that does not meet the definition of lab-tested equipment, the witness test may, at the discretion of the public utility, also include a type test and small generator facility evaluation according to IEEE 1547 as applicable to the specific interconnection equipment used.¶

(~~49~~52) "Written notice" means a required notice sent by the public utility via electronic mail if the customer-generator has provided a functioning electronic mail address. If the customer-generator has not provided a functioning electronic mail address or has requested in writing to be notified by United States mail, then written notices from the public utility must be sent via First Class United States mail to the notification address provided by the customer-generator. The public utility is deemed to have fulfilled its duty to respond under these rules on the day it sends the customer-generator notice via electronic mail or deposits such notice in First Class mail. The customer-generator is responsible for informing the public utility of any changes to its notification address.
Statutory/Other Authority: ORS 183, ~~ORS 756, ORS~~756, 757
Statutes/Other Implemented: ORS 756.040, ~~ORS~~ 756.060

AMEND: 860-082-0025

RULE SUMMARY: Rule revision adds requirements related to site visits.

CHANGES TO RULE:

860-082-0025
Applications to Interconnect a Small Generator Facility ¶

(1) A person may not interconnect a small generator facility to a public utility's transmission or distribution system without authorization from the public utility.¶
(a) A person proposing to interconnect a new small generator facility to a public utility's transmission or distribution system must submit an application to the public utility.¶
(b) A person with an existing interconnected small generator facility who proposes to make any change to the facility, other than a minor equipment modification, must submit an application to the public utility. This includes changes affecting the nameplate rating of the existing interconnected small generator facility or the output capacity authorized in the agreement governing the terms of the interconnection.¶
(c) An applicant with a pending completed application to interconnect a small generator facility must submit a new application if the applicant proposes to make any change to the small generator facility other than a minor equipment modification. This includes changes affecting the nameplate rating of the proposed small generator facility.¶
(A) The applicant relinquishes the queue position assigned to the pending completed application, and the public utility assigns a new queue position based on the date and time the public utility receives the new application.¶
(B) If the new application is submitted within 30 business days of the date of submission of the original application, then the public utility must apply the original application fee to the application fee required for the new application.¶
(d) A person with a pending completed application to interconnect a net metering facility or a FERC jurisdictional generator who proposes to change the facility to a small generator facility must submit a new application under the small generator interconnection rules.¶
(A) The applicant relinquishes the queue position assigned to the pending completed application, and the public utility assigns a new queue position based on the date and time that the interconnecting public utility receives the small generator interconnection application.¶
(B) If the small generator interconnection application is received within 30 business days of the date of submission of the original net metering or FERC jurisdictional generator interconnection application, then the public utility must apply the original application fee to the application fee required for the new application.¶
(e) An interconnection customer must submit an application to renew an existing small generator facility interconnection before the expiration of the interconnection agreement between the interconnection customer and the interconnected public utility. The application must be submitted no later than 60 business days before the interconnection agreement's expiration date.¶
(A) A public utility may not unreasonably refuse to grant expedited review of an application to renew an existing small generator facility interconnection if there have been no changes to the small generator facility other than minor equipment modifications.¶
(B) A public utility may not require an existing small generator facility to undergo Tier 4 review if there have been no changes to the small generator facility other than minor equipment modifications and there have been no material changes to the portion of the public utility's transmission or distribution system affected by the interconnection of the small generator facility.¶
(C) A public utility may require the interconnection customer to pay for interconnection facilities, system upgrades, or changes to the small generator facility or its associated interconnection equipment that are necessary to bring the small generator facility interconnection into compliance with the small generator interconnection rules or IEEE 1547 or 1547.1.¶
(D) If the public utility has not completed its review of an application to renew and a new interconnection agreement is not signed before the expiration of the current interconnection agreement governing the interconnection of an existing small generator facility to a public utility's transmission or distribution system, then the current interconnection agreement remains in effect until the renewal process is completed and a new interconnection agreement is signed.¶
(2) All applications must be made using the appropriate application form and must follow the standard form applications developed by the public utility and approved by the Commission. The public utility must provide separate application forms for review under Tier 1 and for review under Tiers 2, 3, and 4. The Tier 1 application form must include an unexecuted interconnection agreement. The public utility must provide a copy of an

application form to any person upon request and must post copies of the application forms on the public utility's website.¶
(a) Applicants must use the Tier 1 application form for a small generator facility that meets the requirements of OAR 860-082-0045(1).¶
(b) All applicants may use the application form for Tiers 2, 3, or 4.¶
(3) A public utility may require payment of a nonrefundable application processing fee. The amount of the fee depends upon the review tier requested in the application and is intended to cover the reasonable costs of processing and evaluating the application.¶
(a) The application fee may not exceed $100 for Tier 1 review, $500 for Tier 2 review, and $1,000 for review under Tiers 3 and 4.¶
(b) An applicant must pay the reasonable costs incurred by the public utility to perform any studies and engineering evaluations permitted by these rules and necessary to evaluate the proposed application to interconnect. Before the public utility may assess any costs in excess of the application fee, the public utility must receive written authorization from the applicant. If the applicant does not authorize the additional costs, then the application is deemed withdrawn, and the original application fee is forfeited.¶
(c) If an application is denied at one review tier, and the applicant resubmits the application at a higher review tier within 15 business days after the date the applicant received notification of the denial, then the applicant maintains the queue position assigned to the original application and the public utility must apply the original application fee and any other fees paid in conjunction with the original application to the fees applicable to the resubmitted application.¶
(4) If an applicant proposes to interconnect multiple small generator facilities to the public utility's transmission or distribution system at a single point of interconnection, then the public utility must evaluate the applications based on the combined total nameplate rating for all of the small generator facilities. If the combined total nameplate rating exceeds 10 megawatts, then the small generator interconnection rules do not apply.¶
(5) An applicant must provide documentation of site control with an interconnection application. Site control may be demonstrated through ownership of the site, a leasehold interest in the site, or an option or other right to develop the site for the purpose of constructing the small generator facility. Site control may be documented by a property tax bill, deed, lease agreement, or other legally binding contract.¶
(6) A public utility may propose to interconnect multiple small generator facilities at a single point of interconnection to minimize costs, and an affected applicant or interconnection customer may not unreasonably refuse such a proposal. An applicant or interconnection customer may, however, elect to maintain a separate point of interconnection if the applicant or interconnection customer agrees to pay the entire cost of the separate interconnection facilities.¶
(7) Application review process.¶
(a) Within 10 business days of receipt of an application to interconnect a small generator facility, the interconnecting public utility must provide written notice to the applicant stating whether the application is complete.¶
(A) If the application is incomplete, then the public utility must provide the applicant with a detailed list of the information needed to complete the application. An application is deemed complete when the public utility receives the listed information. The applicant must provide the listed information within 10 business days of receipt of the list, or the application is deemed withdrawn.¶
(B) If a public utility does not have a record of receipt of an application or cannot locate an application, then the applicant must provide an additional copy of the application to the public utility. If the applicant can demonstrate that a complete application was originally delivered to the public utility at a particular time on a particular date, then the public utility must assign a queue position to the application based on the original time and date of delivery.¶
(b) Once the public utility deems an application to be complete, the public utility must assign the application a queue position. An applicant must meet all applicable deadlines in the small generator interconnection rules to maintain its queue position unless the deadlines have been waived by agreement with the interconnecting public utility or by Commission order.¶
(c) If the public utility determines during the evaluation process that supplemental or clarifying information is required, then the public utility must request the information from the applicant, and the applicant must provide the requested information within 15 business days of the request, or the application will be deemed withdrawn. The time necessary to complete the evaluation of the application may be extended by the time required for the receipt of the additional information. Requests for information do not affect the applicant's queue position.¶
(d) A public utility must use IEEE 1547 and IEEE 1547.1 to evaluate small generator interconnection applications unless otherwise specified in these rules or unless the Commission grants a waiver to use different or additional standards.¶
(e) Reference Point of Applicability Review.¶

(A) For Tier 4 applications, the public utility will raise any concerns about the RPA in the scoping meeting.¶
(B) For Tier 1 through Tier 3 applications, the public utility notifies an applicant if the proposed RPA is appropriate when it provides screen results. If the RPA is inappropriate the public utility will notify the applicant in writing, including an explanation as to why it requires correction. The applicant must resubmit the application with the corrected RPA within ten business days. If the applicant does not provide the appropriate RPA, a request for an extension of time, or request an applicant options meeting within the deadline, the application will be deemed withdrawn.¶
(f) Interconnection Agreement. If the proposed interconnection is approved and requires no construction of facilities by the public utility, the public utility must provide the applicant an executed interconnection agreement no later than five business days after approving the interconnection. If the proposed interconnection is approved and requires construction of facilities, the public utility must provide the applicant an executed interconnection agreement, along with a non-binding good faith cost estimate and construction schedule for any required upgrades, no later than 15 business days after approving the interconnection. If the applicant does not return a countersigned interconnection agreement and any required deposit not to exceed the amount in OAR 860-082-0035(5)(a) to the public utility, or request negotiation of a non-standard interconnection agreement, within 15 business days of receipt of an executed interconnection agreement, the application is deemed withdrawn.¶
(A) An applicant or a public utility is entitled to the terms in the standard form agreement but may choose to negotiate for different terms.¶
(B) If negotiated changes to a standard interconnection agreement are materially inconsistent with the small generator interconnection rules, then the applicant and the public utility must seek Commission approval of the negotiated interconnection agreement.¶
(g) The applicant must provide the public utility written notice at least 20 business days before the planned commissioning for the small generator facility.¶
(A) The public utility has the option of conducting a witness test at a mutually agreeable time within 10 business days of receipt of the certificate of completion.¶
(B) The public utility must provide written notice to the applicant indicating whether the public utility plans to conduct a witness test or will waive the witness test within three business days of receipt of the certificate of completion.¶
(C) If the public utility notifies the applicant that it plans to conduct a witness test but fails to conduct the witness test within 10 business days of receipt of the certificate of completion or within a time otherwise agreed upon by the applicant and the public utility, then the witness test is deemed waived.¶
(D) If the witness test is conducted and is successful, or if the public utility waives the witness test, the public utility must provide the countersigned certificate of completion within five business days of conducting the witness test or waiver of witness test.¶
(E) If the witness test is conducted and is not acceptable to the public utility, then the public utility must provide written notice to the applicant describing the deficiencies within five business days of conducting the witness test. The public utility must give the applicant 20 business days from the date of the applicant's receipt of the notice to resolve the deficiencies. If the applicant fails to resolve the deficiencies to the reasonable satisfaction of the public utility within 20 business days or at a mutually agreeable time, then the application is deemed withdrawn.¶
(h) A public utility must meet all applicable deadlines in the small generator interconnection rules unless the deadlines have been waived by agreement with an applicant or interconnection customer or by Commission order. If the public utility cannot meet an applicable deadline, then the public utility must provide written notice to the applicant or interconnection customer explaining the reasons for the failure to meet the deadline and an estimated alternative deadline. A public utility's failure to meet an applicable deadline does not affect an applicant's queue position.¶
(i) At least one site visit is required for Tier 4 or 5 applicants prior to interconnection for the purpose of identifying and addressing all relevant site issues including. but not limited to site engineering, permitting, easements, and any other pertinent matters.¶
(A) If requested by the applicant the required site visit shall occur during the Facilities Study. Otherwise the site visit will occur or no later than 60 calendar days following:¶
(i) the public utility's receipt of the Interconnection Customer's initial progress payment or deposit detailed in the Interconnection Agreement; and¶
(ii) the public utility's receipt of the Interconnection Customer's initial design package for the generation resource being interconnected. (B) The site visit may be scheduled later than the times identified above by agreement of the parties but must occur before the Interconnection Customer begins construction of the facilities on its side of the point of interconnection.¶
(B) The reasonable costs of site visits after execution of the Interconnection Agreement will be added to the total interconnection costs to be paid by the Interconnection Customer. The utility will provide the applicant with a separate accounting of site visit costs.¶

(C) If the Interconnection Customer requests the site visit to occur during the Facilities Study process:¶
(i) the Interconnection Customer will pay for the public utility's costs for conducting the site visit when it executes the Facilities Study agreement; and¶
(ii) the time to complete the Facilities Study may increase to 90 business days at request of public utility.¶
(iii) The public utility may request that the applicant provide the public utility additional design/engineering information and have personnel with certain types of expertise available. The applicant and public utility will discuss and seek to reach agreement on the information requirements and necessary personnel before a site visit is scheduled.¶
(iv) Applicants shall provide all relevant site and property information in advance of the site visit, including but not limited to property ownership information, site plans, proposed equipment locations, easement information, and the preferred point of interconnection, as applicable at least 10 business days prior to the site visit. Any delay resulting from incomplete, inaccurate, or untimely applicant-provided information shall result in a corresponding day-for-day extension of the study timeline until such information has been provided to and validated by the utility.
Statutory/Other Authority: ORS 183, ~~ORS 756, ORS~~756, 757
Statutes/Other Implemented: ORS 756.040, ~~ORS~~ 756.060

ADOPT: 860-082-0043

RULE SUMMARY: New rule requiring public utilities to establish and maintain communication protocols and specifying some requirements for protocols.

CHANGES TO RULE:

860-082-0043
Communication Protocols
(1) Each public utility will establish and maintain Communication Protocols and publish them in their handbooks.¶
(2) Following execution of an interconnection agreement, the public utility and representatives of the applicant will meet once per month unless both parties mutually agree in writing to waive the meeting.¶
(3) Representatives of the applicant are able to request meetings on a more frequent basis, such as weekly, as needed. The public utility will not decline requests without providing written justification.¶
(4) Upon change of ownership of a small generator facility, either operating, or in the interconnection process, representative of the new owner(s) will provide written notice to the interconnecting utility within 15 business days of assuming ownership.¶
(5) A public utility may charge an applicant reasonable costs associated with adhering to the public utility's communication protocols, and shall account for such cases separately from other costs.
Statutory/Other Authority: ORS 183, 758
Statutes/Other Implemented: ORS 756.040, 756.060

AMEND: 860-082-0060

RULE SUMMARY: The rule revisions include option to be studied for limited operations; expand options to use third-party interconnection studies and impose requirements related to same; impose new timing requirements for interconnection studies; specify that costs of interconnection studies may be allocated to public utilities rather than interconnection applicants when timing requirements are not met; impose new requirements for construction timeline for interconnection agreements; specify circumstances in which costs of construction may be allocated to public utility when timeline not met; and authorize interconnection applicant and public utility to extend construction timeline in interconnection agreement.

CHANGES TO RULE:

860-082-0060
Tier 4 Interconnection Review ¶

(1) A public utility must use the Tier 4 interconnection review procedures when an applicant submits an application requesting Tier 4 review to interconnect a small generator facility meeting the following requirements:¶
(a) The small generator facility must have a nameplate rating of 10 megawatts or less.¶
(b) An applicant whose Tier 1, Tier 2, or Tier 3 application was denied may request that the public utility treat that existing application already in the public utility's possession as a new Tier 4 application. Within ten business days of receipt of the applicant's request to use the existing application, the public utility will transfer the existing application to the Tier 4 process and notify the applicant whether or not the application is complete. If the application is incomplete, the public utility must provide a written list detailing all information that the applicant must provide to complete the application. The applicant will have ten business days after receipt of the list to submit the listed information. Otherwise, the application will be deemed withdrawn. The public utility must notify the applicant within ten business days of receipt of the revised application whether the revised application is complete or incomplete. The public utility may deem the application withdrawn if it remains incomplete.¶
(2) A public utility must approve an application to interconnect a small generator facility under the Tier 4 interconnection review procedures if the public utility determines that the safety and reliability of the public utility's transmission or distribution system will not be compromised by interconnecting the small generator facility. The applicant must pay the reasonable costs of any interconnection facilities or system upgrades necessitated by the interconnection.¶
(3) In addition to the timelines and requirements in OAR 860-082-0025, the timelines and requirements in sections (5) through (12) of this rule apply to Tier 4 interconnection reviews.¶
(4) A public utility and an applicant may agree to waive the requirement for a scoping meeting, the system impact study, or the facilities study. The applicant may waive the requirement for a feasibility study.¶
(5) A public utility must schedule a scoping meeting within 10 business days after notifying an applicant that its application is complete.¶
(a) The public utility and the applicant must bring to the scoping meeting all personnel, including system engineers, as may be reasonably required to accomplish the purpose of the meeting.¶
(b) The public utility and applicant must discuss whether the public utility should perform a feasibility study or proceed directly to a system impact study, a facilities study, or an interconnection agreement.¶
(c) If the public utility determines that no studies are necessary, then the public utility must follow the requirements in OAR 860-082-0025(7) if:¶
(A) The application meets the criteria in section (2); and¶
(B) The interconnection of the small generator facility does not require system upgrades or interconnection facilities different from or in addition to the applicant's proposed interconnection equipment.¶
(d) If the public utility determines that no studies are necessary and that the small generator facility could be interconnected safely if minor modifications to the transmission or distribution system were made (for example, changing meters, fuses, or relay settings), then the public utility must offer the applicant a good-faith, non-binding estimate of the costs of such proposed minor modifications. Modifications are not considered minor under this subsection if the total cost of the modifications exceeds $10,000. If the applicant authorizes the public utility to proceed with the minor modifications and agrees to pay the entire cost of the modifications, then the public utility must send the applicant an executed interconnection agreement within 15 business days of receipt of the applicant's agreement to pay for the minor modifications.¶
(6) If the applicant requests a feasibility study, then the public utility must provide the applicant with an executable feasibility study agreement within five business days of the date of the scoping meeting.¶

(a) The feasibility study agreement must include a detailed scope for the feasibility study, a reasonable schedule for completion of the study, and a good-faith, non-binding estimate of the costs to perform the study.¶
(b) The feasibility study agreement must follow the standard form agreement developed by the public utility and approved by the Commission.¶
(c) The applicant must execute the feasibility study agreement within 15 business days of receipt of the agreement or the application is deemed withdrawn.¶
(d) The public utility must make reasonable, good-faith efforts to follow the schedule set forth in the feasibility study agreement for completion of the study.¶
(e) The feasibility study must identify any potential adverse system impacts on the public utility's transmission or distribution system or an affected system that may result from the interconnection of the small generator facility. In determining possible adverse system impacts, the public utility must consider the aggregated nameplate rating or export capacity when applicable of all generating facilities that, on the date the feasibility study begins, are directly interconnected to the public utility's transmission or distribution system, have a pending completed application to interconnect with a higher queue position, or have an executed interconnection agreement with the public utility.¶
(f) The public utility must evaluate multiple potential points of interconnection at the applicant's request. The applicant must pay the costs of this additional evaluation.¶
(g) The public utility must provide a copy of the feasibility study to the applicant within five business days of the study's completion.¶
(h) If the feasibility study identifies any potential adverse system impacts, then the public utility must perform a system impact study.¶
(i) If the feasibility study does not identify any adverse system impacts, then the public utility must perform a facilities study if the public utility reasonably concludes that a facilities study is necessary to adequately evaluate the application.¶
(A) If the public utility concludes that a facilities study is not required, then the public utility must approve the application if the application meets the criteria in section (2) and the interconnection of the small generator facility does not require system upgrades or interconnection facilities different from or in addition to the applicant's proposed interconnection equipment.¶
(B) If the public utility concludes that a facilities study is not required and that the small generator facility could be interconnected safely if minor modifications to the transmission or distribution system were made (for example, changing meters, fuses, or relay settings), then the public utility must offer the applicant a good-faith, non-binding estimate of the costs of such proposed minor modifications. Modifications are not considered minor under this paragraph if the total cost of the modifications exceeds $10,000. If the applicant authorizes the public utility to proceed with the minor modifications and agrees to pay the entire cost of the modifications, then the public utility must approve the application.¶
(7) If a public utility is required to perform a system impact study under subsection (6)(h), or if an applicant and a public utility agree in the scoping meeting to waive the feasibility study and proceed directly to the system impact study, then the public utility must provide the applicant with an executable system impact study agreement within five business days of completing the feasibility study or from the date of the scoping meeting, whichever is applicable.¶
(a) The system impact study agreement must include a detailed scope for the system impact study, an option to select to be studied for Limited Operations, a reasonable schedule for completion of the study, and a good-faith, non-binding estimate of the costs to perform the study.¶
(b) The system impact study agreement must follow the standard form agreement developed by the public utility and approved by the Commission.¶
(c) ~~T~~Within 15 business days of receipt of the system impact study agreement the applicant must execute and return the system impact study agreement ~~within 15 business days of receipt of the agreement~~or submit a notice of intent to use a third-party consultant to conduct the system impact study, or the application is deemed withdrawn.¶
(d) The public utility must make reasonable, good-faith efforts to follow the schedule set forth in the system impact study agreement for completion of the study.¶
(e) The system impact study must identify and detail the impacts on the public utility's transmission or distribution system or on an affected system that would result from the interconnection of the small generator facility if no modifications to the small generator facility or system upgrades were made. The system impact study must include evaluation of the adverse system impacts identified in the feasibility study and in the scoping meeting.¶
(f) In determining possible adverse system impacts, the public utility must consider the aggregated nameplate rating, or export capacity when applicable, of all generating facilities that, on the date the system impact study begins, are directly interconnected to the public utility's transmission or distribution system, have a pending completed application to interconnect with a higher queue position, or have an executed interconnection

agreement with the public utility. If the small generator facility limits export pursuant to OAR 860-082-0033, the system impact study must use export capacity instead of the nameplate rating, except when assessing fault current contribution. To assess fault current contribution, the system impact study must use the rated fault current if the customer provides the relevant information or provide a written explanation for cases where the utility does not want to rely on customer-provided data. An example of customer-provided data would include provision of manufacturer test data (pursuant to the fault current test described in IEEE 1547.1-2020 clause 5.18) showing that the fault current is independent of the nameplate rating. The public utility must provide an explanation for any cases where the utility does not want to rely on customer-provided data.¶
(g) The system impact study must include:¶
(A) A short circuit analysis;¶
(B) A stability analysis;¶
(C) A power flow analysis;¶
(D) Voltage drop and flicker studies;¶
(E) Protection and set point coordination studies;¶
(F) Grounding reviews;¶
(G) The underlying assumptions of the study;¶
(H) The results of the analyses; and¶
(I) Any potential impediments to providing the requested interconnection service.¶
(h) If an applicant provides an independent system impact study to the public utility, then the public utility must evaluate and address any alternative findings from that study.¶
(i) The public utility must provide a copy of the system impact study to the applicant within five business days of completing the study.¶
(j) If a public utility determines in a system impact study that interconnection facilities or system upgrades are necessary to safely interconnect a small generator facility, then the public utility must perform a facilities study.¶
(k) If the public utility determines that no interconnection facilities or system upgrades are required, and the public utility concludes that the application meets the criteria in section (2), then the public utility must approve the application with 15 business days of completion of the system impact study.¶
(l) If the public utility determines that no interconnection facilities or system upgrades are required and that the small generator facility could be interconnected safely if minor modifications to the transmission or distribution system were made (for example, changing meters, fuses, or relay settings), then the public utility must offer the applicant a good-faith, non-binding estimate of the costs of such proposed minor modifications. Modifications are not considered minor under this subsection if the total cost of the modifications exceeds $10,000. If the applicant authorizes the public utility to proceed with the minor modifications and agrees to pay the entire cost of the modifications, then the public utility must approve the application within 15 business days of the applicant's agreement to pay for the minor modifications.¶
(m) The public utility must allow opportunity for an applicant in any serially studied small generator interconnection queue to use a third-party consultant to conduct the system impact study.¶
(A) The public utility must publish criteria for applicants electing to use a third system impact study including minimum requirements for the study format and methods. the data sharing process. any non-disclosure and data handling agreements. and other needed policies. The criteria must also include:¶
(i) A description of necessary analysis. as well as required format for output. including any necessary workpapers.¶
(ii) A listing of national standards relied on by the public utility. and¶
(iii) A listing of any additional critical standards required. with underlying rationale.¶
(B) Each public utility must designate and make available a liaison for applicants electing to use a third-party consultant to clarify data. resolve ambiguities. and explain technical requirements to the best of the liaison's ability. Information provided by the liaison will not replace or limit the utility's review of the third-party consultant's study under subsection (7)(o).¶
(C) Each public utility must establish detailed instructions for eligible interconnection applicants to:¶
(i) Provide a qualifying notice of intent to use a third-party consultant to conduct the system impact study. including any forms required for non-disclosure and data handling agreements; and¶
(ii) Request the data necessary to perform to the third-party system impact study to the public utility's specifications.¶
(D) Within five (5) business days of receipt of an applicant's notice of intent to use a third-party consultant to perform the system interconnection study. the public utility will notify the applicant in writing whether or not the application is complete.¶
(E) The public utility must provide a third-party consultant access to public utility data within 21 calendar days of the public utility's receipt of a qualifying notice of intent to use a third-party consultant to conduct a system impact study. Data provided by the public utility must be provided in a standardized, machine-readable format, except as otherwise agreed.¶

(n) Applicant obligations for third-party studies.¶
(A) Before submitting a third-party study, the applicant must notify the public utility of their intent to use a third-party consultant for the system impact study in the manner set forth by the public utility under subsection (7)(m)(C).¶
(B) Any third-party system impact study must be completed within 45 business days of the later of the following, unless another date is mutually agreed to:¶
(i) The public utility's written acceptance of applicant's notice of intent to use of third-party consultant to perform system impact study,¶
(ii) or the applicant's receipt of data required under this rule.¶
(C) Any third-party study must include a professional engineer's stamp.¶
(o) The public utility must accept or reject in writing any third-party study within 30 business days of study receipt.¶
(A) If a third-party study is accepted, the public utility must follow the process set forth in subsection (7)(j), (k), or (l).¶
(B) If a study is rejected, the public utility must identify all study modifications required, with supporting rationale.¶
(C) If a study is rejected, the applicant has 45 business days to provide an updated study addressing all public utility-raised issues.¶
(D) A public utility's decision to approve or reject a third-party study must be based on safety, reliability and compliance with published standards.¶
(E) The public utility may charge the applicant for the reasonable costs incurred by the public utility in preparing and providing technical data under this subsection.¶
(F) The public utility may charge the applicant for the reasonable costs of reviewing any third-party study up to $1,000.¶
(8) If a public utility is required to perform a facilities study under subsection (6)(i) or 7(j), or if an applicant and a public utility agree in the scoping meeting to waive the system impact study and proceed directly to the facilities study, then the public utility must provide the applicant with an executable facilities study agreement within five business days of completing the system impact study or within five business days from the date of the scoping meeting, whichever is applicable.¶
(a) The facilities study agreement must include a detailed scope for the facilities study, an option to include a site visit to inform the study, a reasonable schedule for completion of the study, and a good-faith, non-binding estimate of the costs to perform the study.¶
(b) The facilities study agreement must follow the standard form agreement developed by the public utility and approved by the Commission.¶
(c) The applicant must execute the interconnection facilities study agreement within 15 business days after receipt of the agreement or the application is deemed withdrawn.¶
(d) The public utility must make reasonable, good-faith efforts to follow the schedule set forth in the facilities study agreement for completion of the study.¶
(e) The facilities study must identify the interconnection facilities and system upgrades required to safely interconnect the small generator facility and must determine the costs for the facilities and upgrades, including equipment, engineering, procurement, and construction costs. Design for any required interconnection facilities or system upgrades must be performed under the facilities study agreement. The public utility must also identify the electrical switching configuration of the equipment, including transformer, switchgear, meters, and other station equipment.¶
(f) The public utility may contract with a third-party consultant to complete the interconnection facilities and system upgrades identified in the facilities study. A public utility and an applicant may agree in writing to allow the applicant to hire a third-party consultant to complete the interconnection facilities and system upgrades, subject to public utility oversight and approval.¶
(g) The interconnection facilities study must include a detailed estimate of the time required to procure, construct, and install the required interconnection facilities and system upgrades.¶
(h) If the applicant agrees to pay for the interconnection facilities and system upgrades identified in the facilities study, then the public utility must approve the application.¶
(9) The public utility may contract with a third-party consultant to complete a feasibility study, system impact study, or facilities study. A public utility and an applicant may agree in writing to allow the applicant to hire a third-party consultant to complete a feasibility study, system impact study, or facilities study, subject to public utility oversight and approval.¶
(10) The interconnection process is not complete until:¶
(a) The public utility approves the application;¶
(b) Any interconnection facilities or system upgrades have been completed;¶
(c) Any minor modifications to the public utility's transmission or distribution system required under subsections

(5)(d), 6(i)(B), or (7)(l) have been completed;¶
(d) The witness test, if conducted by the public utility, is successful; and¶
(e) The applicant and public utility execute a certificate of completion.¶
(11) If a small generator facility is not approved under the Tier 4 interconnection review procedures, then the public utility must provide a written explanation of the denial to the applicant.¶
(12) Interconnection Study Timelines.¶
(a) Notwithstanding other subsections in this rule regarding timing of studies, the following timelines are applicable to serially studied small generators.¶
(A) The public utility must perform a system impact study within 45 business days of the latest of the following:¶
(i) The public utility's receipt of a signed system impact study agreement from the applicant;¶
(ii) The public utility's receipt of all necessary study fees and deposits from the applicant; and¶
(iii) The public utility's receipt of all necessary data from applicant.¶
(iv) The study timeline may be extended by 10 business days when an applicant requests the system impact study incorporate a limited operations analysis.¶
(B) The public utility must perform a facilities study within 45 business days of the latest of the following:¶
(i) The public utility's receipt of a signed facilities study agreement from the applicant;¶
(ii) The public utility's receipt of all necessary study fees and deposits from the applicant; and¶
(iii) The public utility's receipt of all necessary data from the applicant.¶
(C) At request of the public utility, the time to complete the facilities study under subsection 12(a)(B) can be extended for an additional 45 business day period when the applicant requests a site visit occur during the facilities study.¶
(D) Upon request of the applicant, the time to complete the system impact study or facilities study under subsections 12(a) (A) and (8) may be extended beyond the end of the 45 business day period. or any longer period established under subsection 12(a)(C). if the delay will not impact lower queued projects.¶
(b) For any study that is not provided in the timeline specified in section (12) the public utility:¶
(A) Must reduce the study costs owed to the public utility from the applicant by fifty percent for any delay up to 15 business days from the due date for the study, and by 100 percent for any delay longer than 15 business days, refund any study costs in excess of the reduced study fees if the applicant has already remitted payment to public utility, and file a report with the Commission indicating the reason for failure to meet the time requirement and the amount of time required to complete the study; or¶
(B) May seek a waiver from the Commission under OAR 860-082-0020 of the obligation to finish the study within 45 days, for good cause.¶
(13) Construction timelines.¶
(a) This subsection applies to all serially studied small generators proposing to interconnect to a public utility's system.¶
(b) The construction timeline included in the Interconnection Agreement, starting at the execution of the Interconnection Agreement through the witness test, must be no longer than 600 calendar days unless otherwise agreed to by applicant and the public utility.¶
(A) Prior to execution of the Interconnection Agreement, a public utility may seek waiver of the maximum 600-day construction timeline from the Commission for good cause if parties cannot reach agreement on the construction timeline.¶
(B) After execution of the Interconnection Agreement. the 600-day timeline may be extended by mutual agreement when an applicant misses a milestone specified in the interconnection agreement. Prior to terminating an interconnection agreement due to a missed milestone(s). the public utility must offer to update the interconnection agreement to incorporate day-for-day extension for missed milestones.¶
(c) A public utility that fails to construct the facilities specified in the Interconnection Agreement within the 600 day maximum timeline. or date specified in the Interconnection Agreement if later, will discount the costs charged to the applicant for interconnection, including costs of facilities by five (5) percent for every 30 calendar days construction extends beyond the maximum 600-day timeline or agreed upon end of construction timelines, if later than 600 days, unless:¶
(A) Following completion of the construction of the required facilities. the public utility obtains a waiver from the Commission under OAR 860-0082-0010 of the obligation to construct facilities within the maximum 600 day timeline, or by the date specified in the Interconnection Agreement if later, for good cause, which could include events outside of the public utility control.¶
(B) The public utility and applicant agree in writing to extend the construction timeline included in the Interconnection Agreement.¶
(d) An applicant may assume responsibility for design, procurement, and construction of mutually agreed-upon interconnection facilities and stand-alone system upgrades, to be consistent with Commission-approved terms and conditions for the option to build in the QF-LGIA (see Order No. 25-355). The applicant and public utility must

execute an agreement documenting the interconnection facilities and stand-alone system upgrades that will be made by the applicant.¶
(14) Other Interconnection Options; Limited Operation.¶
(a) After execution of an Interconnection Agreement and pending completion of required interconnection facilities or system upgrades necessary to accommodate operation at the facility's full authorized export capacity, the applicant may seek authority from the public utility for limited operations.¶
(b) The public utility shall, upon the request and at the expense of applicant that has executed a system impact study, perform operating studies on a timely basis to determine the extent to which the applicant's interconnection facilities may operate prior to the completion of system upgrades consistent with applicable laws and regulations and reliability standards.¶
(c) An applicant may only engage in limited operations with the public utility's express written authorization, which allows operation pursuant to fixed limited export parameters or other utility-approved operating limitations consistent with the interconnection agreement and applicable utility requirements.¶
(d) A public utility shall not unreasonably deny an applicant authority to engage in limited operations pending completion of required facilities.¶
(e) Any costs the public utility incurs under this subsection are not subject to discount as provided in subsection 13(c).
Statutory/Other Authority: ORS 183, ~~ORS 756, ORS~~756, 757
Statutes/Other Implemented: ORS 756.040,~~ ORS~~ 756.060

AMEND: 860-082-0065

RULE SUMMARY: Rule revision changing reporting requirement from annual to quarterly and imposing additional reporting requirements.

CHANGES TO RULE:

860-082-0065
Recordkeeping and Reporting Requirements ¶

(1) The public utility must maintain a record of the following information for at least two years:¶
(a) The number of complete small generator interconnection applications received;¶
(b) The time required to complete the review process for each application; and¶
(c) The reasons for the approval or denial of each application.¶
(2) For as long as an interconnection customer's small generator facility is interconnected to a public utility's transmission or distribution system, the interconnecting public utility must maintain copies of the interconnection application, interconnection agreement, and certificate of completion for the small generator facility. The public utility must provide a copy of the interconnection customer's records to the interconnection customer within 15 business days after receipt of a written request.¶
(3) The public utility must submit ~~an annual~~quarterly reports to the Commission summarizing the public utility's interconnection activities for the previous calendar ~~yea~~quarter. The ~~annual~~quarterly reports must be filed by ~~May 30 and must include the following information:¶~~
~~(a~~February 28, May 30, August 31, and November 30 and must include the following information for each interconnection application that was active during the quarter:¶
(a) Summary statistics including:¶
(A) The number of complete small generator interconnection applications received;¶
(~~b~~B) The number of small generator facility interconnections completed;¶
(~~c~~C) The ~~types of small generator facilities applying for interconnection and the nameplate rating of the facilities;¶~~
~~(d) The location of completed and proposed small generator facilities by zip code~~number of applications withdrawn;¶
(~~e~~D) For each Tier 3 and Tier 4 small generator interconnection approval, the basic telemetry configuration, if applicable; and¶
(~~f~~b) ~~For each Tier 4 small generator interconnection approval:¶~~
~~(A) The interconnection facilities required to accommodate the interconnection of a small generator facility and the estimated costs of those facilities; and~~Data as required in any report using the Excel template as approved by the Commission. ¶
(~~B~~c) ~~The system upgrades required to accommodate the interconnection of a small generator facility and the estimated costs of those upgrades~~Any Reports will be evaluated every three years for continued applicability.
Statutory/Other Authority: ORS 183, ~~ORS 756, ORS~~756, 757
Statutes/Other Implemented: ORS 756.040, ~~ORS~~ 756.060