



Dykema Gossett PLLC
Capitol View
201 Townsend Street, Suite 900
Lansing, MI 48933

WWW.DYKEMA.COM

Tel: (517) 374-9100

Fax: (517) 374-9191

Richard J. Aaron

Direct Dial: (517) 374-9198

Direct Fax: (855) 230-2517

Email: RAaron@dykema.com

August 22, 2024

Ms. Lisa Felice
Executive Secretary
Michigan Public Service Commission
7109 West Saginaw Hwy, 3rd Floor
Lansing, MI 48909-7721

Re: MPSC Case No. U-21481

Dear Ms. Felice:

Enclosed please find the MECA Coops' Joint Interconnection Procedures and Forms in the above-referenced matter. Please contact me with any questions. Thank you.

Sincerely,

Dykema Gossett PLLC

Richard J. Aaron

STATE OF MICHIGAN
BEFORE THE MICHIGAN PUBLIC SERVICE COMMISSION

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In the matter of the request of Alger Delta Cooperative Electric Association, Cherryland Electric Cooperative, Cloverland Electric Cooperative, Great Lakes Energy Cooperative, HomeWorks Tri-County Electric Cooperative, Midwest Energy & Communications, Ontonagon County REA, Presque Isle Electric & Gas Co-op, and Thumb Electric Cooperative, individually and collectively, for approval of interconnection procedures, forms, fees and related relief.

Case No. U-21481

JOINT INTERCONNECTION PROCEDURES AND FORMS

Alger Delta Cooperative Electric Association, Cherryland Electric Cooperative, Cloverland Electric Cooperative, Great Lakes Energy Cooperative, HomeWorks Tri-County Electric Cooperative, Midwest Energy & Communications, Ontonagon County REA, Presque Isle Electric & Gas Co-op, and Thumb Electric Cooperative, individually and jointly (the “MECA Coops”) provide their interconnection procedures and forms consistent with the Michigan Public Service Commission’s order in this case on July 23, 2024.

MECA
INTERCONNECTION PROCEDURES MANUAL

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MANUAL OF PROCEDURES FOR INTERCONNECTION REQUESTS

INITIAL FEES

- (1) After the effective date of these rules, fees for the pre-application report the non-export track, the fast track, and the study track may not exceed the initial fee caps listed in subrule (2), and the caps must remain in effect until interconnection procedures are approved by the commission under R 460.920.
- (2) The initial fee amounts for all levels of DERs are as follows:
 - (a) The pre-application report fee may not exceed \$300.
 - (b) Any applicable legacy net metering program application fee pursuant to R 460.1004(7) or distributed generation program application fee pursuant to R 460.1006(6), together, may not exceed a total of \$50.
 - (c) The non-export track fee may not exceed \$100 + \$1/kWac for certified DERs and \$100 + \$2/kWac for non-certified DERs.
 - (d) The fast-track initial review fee is \$100 + \$1/kWac for certified DERs and \$100 + \$2/kWac for non-certified DERs.
 - (e) The fee for a fast-track supplemental review including all review screens may not exceed \$5,000.
 - (f) The study track fee for interconnection application review and the scoping meeting may not exceed \$300.
 - (g) The system impact study fee may not exceed \$30,000. For a level 5 system, the Cooperative fee shall not exceed \$50,000. [This is because Cooperatives will likely need to engage up to two separate external engineering firms and the process will involve an affected system.]
 - (h) The facilities study fee may not exceed \$30,000. For a level 5 system, the Cooperative fee shall not exceed \$50,000. [This is because Cooperatives will likely need to engage up to two separate external engineering firms and the process will involve an affected system.]
 - (i) Should additional studies be required by affected systems such as regional transmission organizations (“RTO”) and independent system operators (“ISO”), costs of those studies will be in addition to the initial fees under this subrule and shall be paid by the applicant.
- (3) The initial fees caps listed in subrule (2) of this rule are displayed prominently on the Cooperative’s interconnection website.

(4) As noted in subrule 2(f) and Subrule 2(g), the Cooperative expects to incur costs greater than the fee listed in subrule (2) or initial fee caps listed in subrule (3) of this rule and has requested waiver pursuant to R 460.910 in the approval of the Cooperative's procedures. In addition, the Cooperative requests waiver of the initial fees and fee caps where affected system studies are required by an RTO or ISO and costs are incurred for the studies. Finally, the Cooperatives reserve the right to set fees and charges as provided in the Electric Cooperative Member-Regulation Act.

PROCEDURES

1. GENERAL

A. Purpose

This manual sets forth the procedures the Cooperative will follow to process requests for interconnection from qualified third parties or from member/customers (Applicant). The procedures require coordination with the Cooperative's supplier of generation and affected system(s).

B. Relief From Procedures

The Cooperative may suspend the deadlines for fairly processing applications in instances in which the number of applications exceed the capacity of the Cooperative and its generation and transmission service provider to timely meet the deadlines in these rules. In such an event, the Cooperative will process applications in the order they are received as reasonably soon as possible and notify applicants of their position in the queue.

The Cooperative shall notify the commission and all applicants that have in process applications when timelines are being extended due to catastrophic conditions as defined in R 460.702(f). The Cooperative shall also notify the commission and all applicants that have in-process applications when application processing resumes.

C. Definitions

Definitions used in this manual are set forth in appendix A.

D. Interconnection Types

There are three processes of interconnection requests subject to the Cooperative's interconnection procedures. DERs that are not capable of operating in parallel, (e.g., DERs with isolating transfer switches) with the Cooperative's system are not required to submit an interconnection application; however, the Cooperative encourages such types of DERs to provide awareness of such installations. Interconnection requests subject to the Cooperative's interconnection procedures will be processed through the following methods:

Non-Export Track – (R460.042) See [procedure 5] for specific steps to process. Fast Track – (R460.946) See [procedure 6] for specific steps to process.
Study Track – Individual Study (R460.952) See [procedure 7] for specific steps to process.

After an application for interconnection and fees are received, the Cooperative will identify the interconnection type and follow the procedures specific to that type of interconnection.

E. Communications

(1) The Cooperative shall designate one or more interconnection coordinators. The telephone number and e-mail address of the interconnection coordinator or coordinators must be made available on the Cooperative's website. The interconnection coordinator or coordinators must be available to provide reasonable assistance to the applicant or interconnection customer but is not responsible to directly answer or resolve all the issues that may arise in the interconnection process.

(2) An applicant may designate an application agent. An application agent may serve as the single point of contact for the applicant and may coordinate with the Cooperative on the applicant's behalf. Designation of an application agent does not absolve the applicant from signing interconnection documents or from complying with the requirements in these rules and the interconnection agreement.

(3) The Cooperative must be indemnified by the applicant and its application agent with respect to assistance provided by an interconnection coordinator or coordinators.

F. Interconnection List

(1) The Cooperative shall maintain a publicly available interconnection list, which is available in a sortable spreadsheet format. The sortable spreadsheet must be provided to the public upon request. If the Cooperative has received not less than 100 complete interconnection applications in a year, the Cooperative shall publish this list on its website. The public interconnection list must be updated monthly. If no changes to the spreadsheet have occurred in that month, a note to that effect must be clearly indicated on the spreadsheet. The date of the most recent update must be clearly indicated.

- (2) The public interconnection list includes all the following:
- (a) An application identifier.
 - (b) The date that the Cooperative received the application. The date that the Cooperative considered the application to be complete and conforming.
 - (c) Whether the application is on the non-export track, fast track, or study track.
 - (d) The proposed DER nameplate rating.
 - (e) The proposed DER interconnection size level.
 - (f) The DER technology type.
 - (g) The county and township in which the proposed point of common coupling will be located.

- (h) The status of the application's progress in the interconnection process.
- (i) The labels, names, or identifiers of the distribution circuit and substation.

2. PRE-APPLICATION REPORT REQUEST

A. Pre-Application Request Forms

(1) An applicant shall submit a completed pre-application report request form and the required \$300 fee for a pre-application report on a proposed level 4 or level 5 DER.

(2) The pre-application report request form must include all the following information:

- (a) Project contact information, including name, address, phone number, and email address.
- (b) Project location, as accurately as can be identified, which may be given by any of the following:
 - (i) Street address with nearby cross streets and town.
 - (ii) An aerial map with location clearly marked.
 - (iii) GPS coordinates.
- (c) Account number, meter number, structure number, or other equivalent information identifying the proposed point of common coupling, if available.
- (d) Whether the DER is any of the following:
 - (i) Solar.
 - (ii) Wind.
 - (iii) Cogeneration.
 - (iv) Storage.
 - (v) Solar with storage.
 - (vi) Other type of DER.
- (e) Capacity of the DER types in alternating current kW, direct current kW, and kVA, and kWh for storage.
- (f) Whether the DER configuration is single or 3-phase.
- (g) Whether the DER will be a stand-alone generator, meaning no onsite load other than station service.
- (h) Whether the DER will be certified.
- (i) Whether new service is requested. If there is existing service, the customer account number and site minimum and maximum current or proposed electric loads in kW, if available, must be included, and how the load is expected to change must be specified.
- (j) Whether the location is new construction.

- (k) If applicable, whether the coupling between the generation and storage is alternating current or direct current and whether separate inverters will be used.

B. Pre-Application Report

(1) Using the information provided in the pre-application report request form described above the Cooperative, in coordination with its generation and transmission service provider, shall identify the substation bus, bank, or circuit most likely to serve the point of common coupling. This identification by the Cooperative and its generation/transmission supplier does not necessarily indicate that this would be the circuit to which the project ultimately connects.

(2) An applicant may request additional pre-application reports if information about multiple points of common coupling is requested. No more than 2 pre-application report requests may be submitted by an applicant and its affiliates during a 1-week period. The Cooperative may reject additional pre-application report requests.

(3) The pre-application report shall include all the following information:

- (a) Total capacity, in MW, of substation bus, bank, or circuit based on normal or operating ratings likely to serve the proposed point of common coupling.
- (b) Existing aggregate generation capacity, in MW, interconnected to a substation bus, bank, or circuit likely to serve the proposed point of common coupling.
- (c) Aggregate capacity, in MW, of generation not yet built but found in previously accepted interconnection applications, for a substation bus, bank, or circuit likely to serve the proposed point of common coupling.
- (d) Available capacity, in MW, of substation bus, bank, or circuit likely to serve the proposed point of common coupling.
- (e) Substation nominal distribution voltage.
- (f) Nominal distribution circuit voltage at the proposed point of common coupling.
- (g) Label, name, or identifier of the distribution circuit on which the proposed point of common coupling is located.

- (h) Approximate circuit distance between the proposed point of common coupling and the substation.
- (i) The actual or estimated peak load and minimum load data at any relevant line section or sections, including daytime minimum load and absolute minimum load, when available. If not readily available, the report must indicate whether the generator is expected to exceed minimum load on the circuit.
- (j) Whether the point of common coupling is located behind a line voltage regulator and whether the substation has a load tap changer.
- (k) Limiting conductor ratings from the proposed point of common coupling to the distribution substation.
- (l) Number of phases available at the primary voltage level at the proposed point of common coupling, and, if a single phase, distance from the 3-phase circuit.
- (m) Whether the point of common coupling is located on a spot network, area network, grid network, radial supply, or secondary network.
- (n) Based on the proposed point of common coupling, the report must indicate whether power quality issues may be present on the circuit.
- (o) Whether or not the area has been identified as having a prior affected system.
- (p) Whether or not the site will require a system impact study for high voltage distribution based on size, location, and existing system configuration.

(4) The pre-application report may include only existing and readily available data.

A request for a pre-application report does not obligate the Cooperative to conduct a study or other analysis of the proposed DER if data is not readily available. The pre-application report must also indicate any information listed in this procedure above that is not readily available. The Cooperative may, at its discretion, return any portion of the pre-application report fee because some or all information does not exist.

(5) Pre-application report requests must be processed in the order in which the Cooperative received the requests.

(6) The Cooperative shall provide the data required in the pre-application report to the applicant **within 45 business days of receipt** of the completed request form and payment of the fee. The pre-application report produced by the Cooperative is non-binding and does not confer any rights on the applicant.

3. INTERCONNECTION APPLICATIONS

(1) The Cooperative shall provide an interconnection application for an applicant to complete, including for those applicants whose DERs will be configured to be non-exporting. A separate application is required for each project, or project site. If a single project contains multiple types of DER, include all DER in a single application form.

(2) All documents required for a complete interconnection application must be listed on the interconnection application. For level 4 and 5 interconnection applications, the list of required documents must include a completed pre-application report.

(3) For interconnection applications with proposed DERs that fall into level 1, an applicant shall provide a 1-line diagram and a site diagram.

(4) For interconnection applications with proposed DERs that fall into levels 2 and 3, an applicant shall provide a 1-line diagram that is either sealed by a professional engineer licensed in this state or signed by an electrical contractor who is licensed in this state with the electrical contractor's license number noted on the diagram. An applicant shall also provide a site diagram.

(5) For interconnection applications with proposed DERs that fall into levels 4 and 5, an applicant shall provide a one-line diagram that is sealed by a professional engineer who is licensed in this state. An applicant shall also provide a site diagram.

A. Site Control

(1) Documentation of site control must be submitted with the application by the applicant.

(2) For level 3, 4, or 5 DERs, site control may be demonstrated by providing documentation that shows any of the following:

- (a) Ownership of, a leasehold interest in, or a right to develop a site for the purpose of constructing and operating the DER.
- (b) An enforceable option to purchase or acquire a leasehold site for this purpose.
- (c) A legally binding agreement transferring a present real property right to specified real property along with the right to construct and operate a DER on the specified real property for a period not less than 5 years.

(3) For level 1 or 2 DERs, proof of site control may be demonstrated by the site owner's signature and contact information on the application.

(4) An applicant may redact commercially sensitive information from site control documents.

B. Order of Processing Applications

(1) Applications shall be reviewed to assess whether they are complete and conforming in the order in which they were received. An application is considered received when the Cooperative receives the application, the application's attachments, and the application fee. The application must be date-stamped for the first business day when the Cooperative has received the interconnection application, the application attachments, and payment of the application fee.

Upon receipt of a completed application and fee, the Cooperative shall:

- (a) On the first business day of receipt, date-stamp the application.
- (b) Within 28 business days of the date-stamp, notify the applicant of receipt.
- (c) Within 35 business days of the date-stamp, notify the applicant that the application is complete and accepted or incomplete. If the application is complete and accepted, the notice shall specify the track by which the application will be processed.

C. Notification Regarding Applications

The Cooperative shall notify the applicant that the interconnection application is either complete and conforming, or incomplete, or non-conforming, **within 35 business days of the date stamp.**

(1) Complete applications.

If an interconnection application is determined to be complete and conforming by the Cooperative, the applicant must be notified that the interconnection application is accepted. The Cooperative shall also indicate whether the interconnection application will be processed using the non-export track, fast track, or study track.

(2) Incomplete applications.

If the application is incomplete or non-conforming, the Cooperative shall provide to the applicant a written list of all deficiencies with the notification. The applicant shall have **60 business days from the date of Cooperative notification** to submit the necessary information and may provide up to 2 submissions during this time. After each submission of information, the **Cooperative shall have 35 business days to notify the applicant** that the interconnection application is either accepted or rejected due to continuing deficiencies. If the applicant does not meet the timelines required by this rule, the utility may withdraw the application.

D. Modification of the Interconnection Application

(1) At any point after an interconnection application is considered accepted but before the signing of an interconnection agreement, the applicant, the Cooperative, or the affected system owner may propose modifications to the interconnection application that may improve the costs and benefits of the interconnection, or that improve the ability of

the Cooperative to accommodate the interconnection. The applicant shall submit to the Cooperative, in writing, all proposed modifications to any information provided in the interconnection application and the Cooperative shall perform a cursory evaluation to determine whether the proposed modification is a material modification and provide the results to the applicant **within 35 business days**.

(2) The Cooperative shall not be required to accept or implement a modification to the Cooperative's distribution system or generation assets that is proposed by an applicant or affected system operator.

(3) The applicant may request a 1-hour consultation to discuss the results of the material modification review.

(4) Neither the Cooperative nor the affected system operator may unilaterally modify an accepted interconnection application. If the Cooperative evaluates DERs using individual studies, the timelines specific to that interconnection application must be suspended while the Cooperative is evaluating the proposed modification.

(5) For a proposed modification which the Cooperative has determined is a material modification, and that further study is required, the applicant shall select one of the following:

- (a) Withdraw the modification.
- (b) Withdraw the application.
- (c) Propose a different modification to the interconnection application for Cooperative review pursuant to subrule (1) of this rule to determine whether the modification is material.
- (d) Initiate informal mediation pursuant to R 460.904.
- (e) Initiate formal mediation pursuant to R 460.906.
- (g) File a complaint pursuant to R 792.10439 to R 792.10446.

(6) The applicant shall notify the Cooperative of its selection pursuant to the above procedure (5) **within 10 business days** of receiving the Cooperative's notification of the results or the modification may be considered withdrawn.

(7) If the proposed modification is determined not to be a material modification or is determined to be an acceptable material modification, but does not require further study, the Cooperative shall continue processing the interconnection application according to these rules.

(8) Any modification to the interconnection application or to the DER that could affect the operation of the distribution system, including but not limited to, changes to machine data, equipment configuration, or the interconnection site of the DER, not agreed to in writing by the Cooperative and the applicant may be treated by the Cooperative as a withdrawal of the interconnection application requiring submission of a new interconnection application.

(9) At any point prior to the execution of an interconnection agreement, changes to ownership will cause the interconnection application to be put on hold until the new owner signs all necessary agreements and documents. The Cooperative may not be found in violation of the Commission's interconnection rules related to the processing of the interconnection application during such a transfer of ownership.

(10) After the execution of the interconnection agreement, the applicant shall notify the Cooperative of any plans to modify the DER. The Cooperative shall review the proposed modification to determine if the modification is considered a material modification. If the Cooperative determines the modification is a material modification, the Cooperative shall notify the applicant in writing of its determination and the applicant shall

submit a new application and application fee along with all supporting materials that are reasonable requested by the Cooperative. The applicant may not begin any material modification to the DER until the interconnection agreement incorporating the material modification is fully executed.

(11) Material modifications, acceptable material modifications, and unacceptable material modifications examples are provided below.

- A. Examples of modifications that are not material modification include but are not limited to:
- i. A change in ownership of a DER; the new owner, however, will be required to execute a new Interconnection Application Form and study agreements for any study that has not been completed and the report issued by the cooperatives;
 - ii. Replacing a component with another component that is considered like-kind with near-identical characteristics;
 - iii. An increase in the DC/AC ratio that does not increase the maximum AC output capability of the generating facility;
 - iv. A decrease in the DC/AC ratio that does not reduce the AC output capability of the generating facility by more than 25% before the System Impact Study Agreement or Facilities Study Agreement has been executed or by more than 10% after the System Impact Study Agreement or Facilities Study Agreement has been executed;
 - v. A change in the DC system configuration to include additional equipment that does not impact the maximum generating capacity, daily production profile, or the proposed AC configuration of the DER or energy storage device, including DC optimizers, DC-DC converters, DC charge controllers, powerplant controllers, and energy storage devices such that the output is delivered during the same periods and with the same profile considered during the system impact study.
- B. Examples of modifications that are acceptable material modifications include but are not limited to:
- i. The addition of an energy storage device that does not change the AC nameplate rating of the DER;
 - ii. A change in point of interconnection to a new location that is on the same circuit less than two poles away from the original location, and the new point of interconnection is within the same protection zone as the original location;
 - iii. A change of transformer connections or grounding from that originally proposed.

C. Examples of modifications that are unacceptable material modifications include but are not limited to:

- i. A change in point of interconnection to a new location, which is not on the same circuit less than two poles away from the original location, or the new point of interconnection is not within the same protection zone as the original location;
- ii. A change or replacement of generating equipment, such as generators, inverters, transformers, relaying, or controls, which is not a like-kind substitution in size, ratings, impedances, efficiencies, or capabilities of the equipment specified in the original or preceding interconnection request;
- iii. A change from certified to noncertified devices;
- iv. A change to certified inverters with different specifications or different inverter control specifications or set-up than originally proposed;
- v. An increase of the maximum generating capacity of a DER; or a change reducing the maximum generating capacity of the DER by more than 25% before the System Impact Study Agreement or Facilities Study Agreement has been executed or by more than 10% after the System Impact Study Agreement or Facilities Study Agreement has been executed.

D. Capacity of the Existing DER

(1) If the interconnection application requests a decrease in capacity for an existing DER, the Cooperative shall evaluate the application based on the new nameplate capacity of the DER. The maximum capacity of a DER is the aggregate nameplate capacity or may be limited as described in the Cooperative's interconnection procedures. Any increase in capacity for an existing DER or material modification, shall be processed as a new application.

(2) An interconnection application for a DER that includes single or multiple types of DERs at a site for which the applicant seeks a single point of common coupling must be evaluated as described in the Cooperative's interconnection procedures.

(3) An interconnection application for a power limited export DER shall include, at a minimum, the details of the control system to limit the amount of power the system is capable of exporting. For example, the reverse power protection utilizing inverters or control systems used to limit the DER export capacity. At a minimum, Level 3, 4, & 5 power limited export DER must provide relay intercommunications with the Cooperative and other protections which may be required based on the specific location of the DER relative to the Cooperative's distribution system.

(4) The Cooperative shall allow interconnection of limited-export or non-exporting DERs according to this subrule. If a DER uses any configuration or operating mode in this subrule to limit the export of electrical power across the point of common coupling, then the capacity shall be only the amount capable of being exported not including any inadvertent export. To prevent impacts on system safety and reliability, any inadvertent export from a DER must comply with the limits in subdivisions (e) or (f) of this subrule. The export capacity specified by the applicant in the application will subsequently be included as a limitation in the interconnection agreement. Other means not listed in this subrule may be utilized to limit export if mutually agreed upon by the Cooperative and applicant.

(a) To ensure power is never exported across the point of common coupling, a reverse power protective function may be provided. The default setting for this protective function shall be 0.1% export of the service transformer's rating, with a maximum 2.0 second time delay.

(b) To ensure at least a minimum amount of power is imported across the point of common coupling at all times and, therefore, that power is not exported, an under-power protective function may be provided. The default setting for this protective function shall be 5% import of the DER's total nameplate rating, with a maximum 2.0 second time delay.

(c) This option requires the nameplate rating of the DER, minus any auxiliary load, to be so small in comparison to its host facility's minimum load that the use of additional protective functions is not required to ensure

that power will not be exported to the distribution system. This option requires the DER capacity to be no greater than 50% of the applicant's verifiable minimum host load over the past 12 months.

(d) A reduced output rating utilizing the power rating configuration setting may be used to ensure the DER does not generate power beyond a certain value lower than the nameplate rating.

(e) DERs may utilize, a Nationally Recognized Testing Laboratory Certified Power Control System and inverter system that results in the DER disconnecting from the distribution system, ceasing to energize the distribution system or halting energy production within 2 seconds if the period of continuous inadvertent export exceeds 30 seconds. Failure of the control or inverter system for more than 30 seconds, resulting from loss of control or measurement signal, or loss of control power, must result in the DER entering an operational mode where no energy is exported across the point of common coupling to the distribution system.

(f) DERs may be designed with other control systems and/or protective functions to limit export and inadvertent export to levels mutually agreed upon by the applicant and the Cooperative. The limits may be based on technical limitations of the applicant's equipment or the distribution system's equipment. To ensure inadvertent export remains within mutually agreed-upon limits, the applicant shall use an internal transfer relay, energy management system, or other customer facility hardware or software.

E. Cost Allocation Methodology

Shared interconnection facilities shall be split equally amongst applicants whose projects necessitate the shared interconnection facilities. Once an applicant's interconnection facilities are in service, the upfront original cost to install those interconnection facilities can no longer be shared by future applicants. Costs of ongoing ownership, maintenance, and future repair/replacement can still be shared by future applicants that share the interconnection facilities in accordance with interconnection agreements.

Shared upgrade costs shall be allocated according to the impact of each DER on the limits exceeded for the shared facilities. A simple example is shown below for a thermal constraint and the same methodology would be used for voltage, interrupting capability, or other constraints.

Distribution Upgrade Cost	Impact of Applicant A	Impact of Applicant B
Upgrade Cost (\$1M)	3 MVA	2 MVA
Cost Allocation	$=(3/5*\$1M)=\$0.6M$	$=(2/5*\$1M)=\$0.4M$

Upgrade costs for higher queued applicants that have agreed to proceed to interconnection agreements will not be considered for cost allocation to lower queued applicants, unless requested and agreed to by all applicants affected.

Upgrades cost and allocations are subject to change due to the potential for an applicant to withdraw up until an applicant’s in service date and costs are reconciled per the interconnection agreements. The Cooperative shall endeavor to notify an applicant as soon as possible after it becomes aware that an applicant’s cost for upgrades changes due to any other applicant withdrawal.

F. Updating Applications Forms

The Cooperative shall review and update interconnection applications periodically to reflect new information required to properly review DERs, subject to commission review and approval.

4. ONLINE APPLICATIONS AND ELECTRONIC SUBMISSION

(1) The Cooperative shall allow pre-application report requests, interconnection applications, and interconnection agreements to be submitted electronically, such as, through the Cooperative’s website or via email.

(2) The Cooperative shall dedicate a page on its website or direct customers to a linked website with information on these rules. The relevant information available to an applicant or interconnection customer via a website must include all the following:

- (a) These rules and interconnection procedures in an electronically searchable format.
- (b) The Cooperative's applications and all associated forms in a format that allows for electronic entry of data.
- (c) Sample documents including, at a minimum, a 1-line diagram with required labels.
- (d) Contact information for the Cooperative's DER interconnection coordinator, including an email address and a phone number.
- (e) Directions for the submission of applications.

5. NON-EXPORT TRACK REVIEW

(1) Interconnection applications for DERs that will not inject electric energy into the Cooperative's distribution system are eligible for evaluation under the non-export track. Non-export eligibility requires an existing electrical service at the applicant's premise.

(2) Subject to review and approval by the commission, the Cooperative may limit the eligibility of the non-export track in its interconnection procedures based on the characteristics of its distribution system. Non-export track eligibility shall be limited to DERs which are either (1) no greater than the average daily load of the of the DER host location, (2) no greater than 50% of the applicant's verifiable minimum host load over the past 12 months, or (3) 50% of the line load on the Cooperative's distribution system at the point of interconnection.

(3) Before submitting an interconnection application, a non-export track applicant may contact the Cooperative for reasonable assistance in determining whether a non-export track review will be sufficient or the study track is necessary. The Cooperative shall provide the applicant assistance based on available information. If the applicant chooses to proceed, an interconnection application shall be submitted pursuant to the general application procedures.

(4) **Within 45 business days** after being notified that the application was accepted, the Cooperative shall perform an initial review by using some or all the initial review screens specified in the Cooperative's interconnection procedures pursuant to R 460.946 and notify the applicant of the results. If the Cooperative chooses to perform a review using a subset of the initial review screens, the exclusion of one or more screens may not be the only basis for the Cooperative to require further study.

(5) If the proposed interconnection passes the initial review screens, or if the proposed interconnection fails the screens but the Cooperative determines that the DER may be interconnected consistent with safety, reliability, and power quality standards, the Cooperative shall notify the applicant.

- (a) If the notification indicates that no interconnection facilities, distribution upgrades, further study, or application modifications are required, the Cooperative shall provide specifications for any equipment the applicant will be required to install within 35 business days of the applicant being notified. Within 10 business days of receiving the equipment specifications, the applicant shall notify the Cooperative whether it will proceed under the Fast Track review to an interconnection agreement or will withdraw the application. The applicant's failure to notify the Cooperative within the required time shall result in the interconnection application being withdrawn by the Cooperative.
- (b) If a facilities study is required, the interconnection application must proceed under R 460.962.

(6) If the proposed interconnection fails any of the initial review screens, and the Cooperative does not or cannot determine that the DER may be interconnected consistent with safety, reliability, and power quality standards, the Cooperative shall notify the applicant, provide the applicant with the results of the initial review screens, and offer all of the options

- (a) Attend a customer options meeting, as described in R 460.948.
- (b) Proceed to supplemental review under R 460.950.
- (c) Submit within 60 business days from the date of the Cooperative notification, with up to 2 submissions during this time, a complete and conforming revised interconnection application that includes application modifications offered or required by the Cooperative. The

application modifications must mitigate or eliminate the factors that caused the interconnection application to fail 1 or more of the initial review screens. After each submission of information, the Cooperative has 35 business days to notify the applicant that the interconnection application is either accepted or rejected due to continuing deficiencies. If the applicant does not meet the timelines required by this subrule, the Cooperative may withdraw the application. After the Cooperative determines the application is accepted, the revised interconnection application must proceed under subrule (4) of this rule.

(d) Withdraw the interconnection application.

(7) If the applicant does not select a course of action under subrule (6) of this rule within 35 business days of notice from the Cooperative, the Cooperative shall withdraw the interconnection application.

(8) When an applicant changes from a non-exporting system to an exporting system, the applicant shall submit a new interconnection application.

6. FAST TRACK

A. Applicability

(1) Level 1, level 2, level 3, level 4, and level 5 applications as large as 5MWac in which the DER is not proposing to interconnect with the Cooperative's high voltage distribution system are eligible for the fast track. Level 5 application proposing to interconnect to the Cooperative's distribution system at 4.8 kV or less, are not eligible for fast track. Projects using an acceptable method for limited export shall be eligible for fast track. The Cooperative's high voltage distribution system will be any voltage at or above 30kV.

(2) An applicant that is eligible for the fast track may forgo the fast track and proceed directly to the study track.

(3) An applicant with an application that is outside the limitations specified in above subparagraph (1) may petition the Cooperative to have its application evaluated under fast track. The Cooperative may approve or reject this request at its discretion.

(4) In determining fast track eligibility, the Cooperative may aggregate all proposed new generation on a site regardless of the existence of a shared point of common coupling or multiple points of common coupling.

B. Initial Review

(1) The initial review screens are specified in subrule (4) below.

(2) The Cooperative may waive application of one, some, or all the initial review screens.

(3) **Within 45 business days** after the Cooperative receives a complete and conforming level 1 or level 2 application and associated payment, or within 55 business days after the Cooperative receives a complete and conforming level 3, level 4, or level 5 application and associated payment, the Cooperative shall perform an initial review and notify the applicant of the results. The initial review must consist of applying the initial review screens selected by the Cooperative to the proposed DER. The Cooperative shall not require a supplemental review or a system impact study if the DER passes the applied initial review screens.

(4) The initial review screens are all the following:

- (a) The entire proposed DER, including all aggregated site generation and point or points of interconnection, must be located within the Cooperative's service territory.
- (b) For interconnection of a proposed DER to a radial distribution circuit, the aggregated generation, including the proposed DER, on the circuit may not exceed 15% of the line section annual peak load as most recently measured or calculated if measured data is not available. A line section is that portion of the Cooperative's distribution system

connected to a customer bounded by automatic sectionalizing devices or the end of the distribution line. The Cooperative may consider 50% of applicable loading, if available, instead of 15% of line section peak loading in the event daytime loading data is not available. For Level 1 and level 2 DERs, capacity known to be already reflected in the minimum load data shall not consider as part of the aggregate generation, for purposes of this screen. This screen does not apply to level 1 and level 2 non-export DER applications.

- (c) For interconnection of a proposed DER to the load side of network protectors, the proposed DER must utilize an inverter-based equipment package and, together with the aggregated other inverter-based DERs, may not exceed the smaller of 5% of a network's maximum load or 50 kWac.
- (d) The proposed DER, in aggregation with other DERs on the distribution circuit, may not contribute more than 10% to the distribution circuit's maximum fault current at the point on the primary voltage nearest the proposed point of common coupling. This screen does not apply to level 1 applications.
- (e) The proposed DER, in aggregate with other DERs on the distribution circuit, may not cause any distribution protective devices and equipment or interconnection customer equipment on the system to exceed 87.5% of the short circuit interrupting capability. An interconnection may not be proposed for a circuit that already exceeds 87.5% of the short circuit interrupting capability. Distribution protective devices and equipment include, but are not limited to, substation breakers, fuse cutouts, and line reclosers. This screen does not apply to level 1 applications.
- (f) The initial review screen determines the type of interconnection to a primary distribution line for the proposed DER, according to the requirements specified in the table in this subdivision. This screen includes a review of the type of electrical service provided to the applicant, including line configuration and the transformer connection to limit the potential for creating over-voltages on the Cooperative's distribution system due to a loss of ground during the operating time of any anti-islanding function.

Primary Distribution Line Type	Type of Interconnection to Primary Distribution Line	Result
3-phase, 3 wire	3-phase or single phase, phase-to-phase	Pass screen
3-phase, 4 wire	Effectively-grounded 3-phase or single-phase, line-to-neutral	Pass screen

- (g) If the proposed DER is less than or equal to 20kW, to be interconnected on single-phase shared secondary, the aggregate generation capacity on the shared secondary, including the proposed DER export capacity, may not exceed 65% of the transformer nameplate rating and may not cause service voltages to exceed service requirements.
 - (h) If the proposed DER is single-phase and is to be interconnected on a center tap neutral of a 240 volt service, its addition may not create an imbalance between the 2 sides of the 240 volt service of more than 20% of the nameplate rating of the service transformer.
 - (i) If the proposed DER is single-phase and is to be interconnected to a 3-phase service, its nameplate rating may not exceed 10% of the service transformer nameplate rating.
 - (j) If the proposed DER's point of common coupling is behind a line voltage regulator, the DER's nameplate rating must be less than 250 kWac. This screen does not include substation voltage regulators.
- (5) Additional Initial Minimal Load Screen For All Tracks And Applications.
- (a) If the total or aggregate DER connected to the feeder is rated at more than 50% of the feeder's minimum loading, or more than the minimum substation loading, it becomes more likely the DER will continue to energize the feeder during system events or back feed the transmission system. Therefore, if the total or aggregate DER does not pass the minimum load screen below, proceed to the Study Track to ensure a System Impact Study can be completed by the Cooperative, and that Facility Studies can be completed by both the Cooperative and the G&T or Transmission provider due to affected substation and transmission facilities.
 - (b) Minimum load screen.
Where 12 months of line section and substation minimum load data, including onsite load but not station service load served by the proposed DER, are available, can be calculated, can be estimated from existing data, or can be determined from a power flow model, the aggregate DER capacity on the line section must be less than both 1) 50% of the minimum feeder load, and 2) 100% of the minimum substation load, for all line sections bounded by automatic sectionalizing devices upstream of the proposed DER. If minimum load data is not available, or cannot be calculated, estimated, or determined, the Cooperative shall include the reason or reasons that it is unable to calculate, estimate, or determine minimum load. The Cooperative must apply all the following:
 - i. The type of generation used by the proposed DER will be considered when calculating, estimating, or determining circuit or line section minimum load relevant for the application

of the minimum load screen specified in this subdivision. Solar photovoltaic generation systems with no battery storage must use daytime minimum load. All other generation must use absolute minimum load unless an operating schedule is provided.

- ii. When this screen is being applied to a DER that serves some station service load, only the net injection of electric energy into the Cooperative's distribution system may be considered as part of the aggregate generation.
- iii. The Cooperative shall not consider as part of the aggregate generation, for purposes of this supplemental screen, DER capacity known to be already reflected in the minimum load data.

(6) If the proposed interconnection passes the initial review screens, or if the proposed interconnection fails the screens but the Cooperative determines that the DER may be interconnected consistent with safety, reliability, and power quality standards, the Cooperative shall notify the applicant. If a facilities study is not required, the interconnection application must proceed under this track to an interconnection agreement. If a facilities study is required, the interconnection application must proceed under R 460.962 a facilities study.

(7) If the proposed interconnection fails any of the initial review screens, and the Cooperative does not or cannot determine that the DER may be interconnected consistent with safety, reliability, and power quality standards, the Cooperative shall notify the applicant, provide the applicant with the results of the application of the initial review screens, and offer all the following options:

- (a) Attend a customer options meeting, as described in R 460.948.
- (b) If the initial review screen is failed, reserved for future supplemental review under R 460.950.
- (c) **Submit within 60 business days** from the date of the Cooperative notification, with up to 2 submissions during this time, a complete and conforming revised interconnection application that includes application modifications offered or required by the Cooperative. The application modifications must mitigate or

eliminate the factors that caused the interconnection application to fail 1 or more of the initial review screens. After each submission of information, the **Cooperative has 35 business days to notify** the applicant that the interconnection application is either accepted or rejected due to continuing deficiencies. If the applicant does not meet the timelines required by this subrule, the Cooperative may withdraw the application. After the Cooperative determines the application is accepted, the revised interconnection application must proceed under subrule (4) of this rule.

(d) Withdraw the interconnection application.

(8) If the applicant does not select a course of action under subrule (7) of this rule **within 20 business days of notice** from the Cooperative, the Cooperative shall withdraw the interconnection application.

C. Customer Options Meeting

(1) Upon an applicant's request, the Cooperative and the applicant shall schedule a customer options meeting between the Cooperative and the applicant to review possible facility modifications, screen analysis, and related results to determine what further steps are needed to permit the DER to be connected safely and reliably to the distribution system. The customer options **meeting must take place within 55 business days of the date of notification** pursuant to R 460.946(7).

(2) At the customer options meeting, the Cooperative shall offer all the following options:

- (a) Proceed to a supplemental review.
- (b) Continue evaluating the interconnection application under the study track.
- (c) Submit **within 60 business days from the date of the customer options meeting**, with up to 2 submissions during this time, a complete and conforming revised interconnection application that includes application modifications offered or required by the Cooperative, which mitigates or eliminates the factors that caused the interconnection application to fail 1 or more of the initial review screens. After each submission of

information, **the Cooperative has 35 business days to notify** the applicant that the interconnection application is either accepted or rejected due to continuing deficiencies. If the applicant does not meet the timelines required by this subrule, the Cooperative may withdraw the application. After the Cooperative accepts the revised interconnection application, it must proceed under Fast Track procedures.

(d) Withdraw the interconnection application.

(3) Following the customer options meeting, the applicant has up to **20 business days** to decide on a course of action and notify the Cooperative. In the absence of this notification within the required time, the Cooperative shall withdraw the application.

(4) The customer options meeting may take place in person or via telecommunications.

D. Supplemental Review

(1) The supplemental review screens specified in below subrule (5).

(2) The Cooperative may waive application of one, some, or all the supplemental review screens.

(3) To receive a supplemental review, an applicant shall submit payment of the supplemental review fee **within 20 business days** of agreeing to a supplemental review. If payment of the fee has not been received by the Cooperative **within 25 business days**, the Cooperative shall withdraw the interconnection application.

(4) **Within 55 business days** after the applicant pays the applicable supplemental review fee or fees, and provides reasonable requested data, the Cooperative shall perform a supplemental review and notify the applicant of the results. The supplemental review must consist of applying the supplemental review screens selected by the Cooperative to the proposed DER. The Cooperative shall not require a system impact study if the DER passes the applied supplemental review screens.

- (5) The supplemental review screens must include all the following:
- (a) Voltage and power quality screen. In aggregate with existing generation on the line section, all the following conditions must be met:
 - (i) The voltage regulation on the line section can be maintained in compliance with relevant requirements under all system conditions.
 - (ii) The voltage fluctuation is within acceptable limits as defined by the IEEE Standard 1453-2015, IEEE Recommended Practice for the Analysis of Fluctuating Installations on Power Systems.
 - (b) Safety and reliability screen. The location of the proposed DER and the aggregate generation capacity on the line section may not create impacts to safety or reliability that require application of the study track to address. The Cooperative shall consider all the following when determining potential impacts to safety and reliability in applying this screen:
 - (i) Whether the line section has significant minimum loading levels dominated by a small number of customers, such as several large commercial customers.
 - (ii) Whether the loading along the line section is uniform.
 - (iii) Whether the proposed DER is located less than 0.5 electrical circuit miles for less than 5 kV or less than 2.5 electrical circuit miles for greater than 5 kV from the substation. In addition, whether the line section from the substation to the point of common coupling is a mainline rated for normal and emergency ampacity.
 - (iv) Whether the proposed DER incorporates a time delay function to prevent reconnection of the DER to the distribution system until distribution system voltage and frequency are within normal limits for a prescribed time.
 - (v) Whether operational flexibility is reduced by the proposed DER, such that transfer of the line section or sections of the DER to a neighboring distribution circuit or substation may trigger overloads, power quality issues, or voltage issues.
 - (vi) Whether the proposed DER employs equipment or systems certified by a recognized standards organization to address technical issues including, but not limited to, islanding, reverse power flow, or voltage quality.
- (6) If the proposed interconnection passes the supplemental review, or if the proposed interconnection fails the review but the Cooperative determines that the DER may be interconnected consistent with safety, reliability, and power quality standards, the

Cooperative shall notify the applicant and the interconnection application must proceed pursuant to both of the following:

- (a) If the proposed interconnection requires a facilities study, the interconnection application must proceed under Facilities Study process below. If the proposed interconnection does not require further study, the interconnection application must proceed to an interconnection agreement.

(7) If the proposed interconnection fails any of the supplemental review screens or the electrical utility is unable to perform a supplemental review screen, and the Cooperative does not or cannot determine that the DER may be interconnected consistent with safety, reliability, and power quality standards, the Cooperative shall notify the applicant, provide the applicant with the results of the application of the supplemental review screens, and offer both of the following options:

- (a) Stop the supplemental review and continue evaluating the proposed interconnection under the study track.
- (b) Withdraw the interconnection application.

(8) For above paragraphs (7) and (8), if an applicant does not select a course of action **within 10 business days of notice** from the Cooperative, the Cooperative shall withdraw the interconnection application.

7. **STUDY TRACK**

(1) The Cooperative shall use the study track to evaluate an interconnection application that has been accepted if one or more of the following conditions is met:

- (a) The DER is not eligible for the non-export track, or fast track.
- (b) The DER did not pass the initial review screens as part of the fast track and the applicant selected the study track option in the customer options meeting.
- (c) The DER did not pass 1 or more supplemental review screens.
- (d) The DER was evaluated under the non-export track and further study is required.

- (e) The DER is eligible for the fast track, but the applicant elected the study track.
- (f) The DER did not pass the initial minimum load screen.

(2) If the interconnection application must be evaluated under the study track because it meets the criteria of subrule (1)(a) of this rule, **within 35 business days** after the Cooperative notifies the applicant that the interconnection application has been accepted pursuant to R 460.936, the Cooperative shall provide to the applicant an individual study agreement or an alternative process pursuant to R460.956.

(3) If the interconnection application must be evaluated under the study track because it meets the criteria of above paragraphs (1)(b), (c), (d), (e) or (f), within **35 business days after the applicant** has notified the Cooperative to proceed to the study track, the Cooperative shall provide to the applicant an individual study agreement or an agreement for an alternative process.

(4) The Cooperative's interconnection procedures may include a provision for determining appropriate milestone payments to include with the system impact study fee and facilities impact study fee.

A. Individual Study

(1) The Cooperative that is evaluating DERs in the study track individually shall process the interconnection applications in the order in which the applications were placed into the study track, considering withdrawn interconnection applications and electrically remote DERs. An electrically remote DER in an individual study may be studied on an expedited schedule relative to electrically coincident DERs. Electrically remote DERs must be studied in the order the interconnection applications were considered complete.

(2) When an interconnection application is delayed due to an affected system issue, informal mediation pursuant to R 460.904, formal mediation pursuant to R 460.906, or a complaint pursuant to R 792.10439 to R 792.10446, other interconnection applications that were placed into the study track on a later date may progress in the order in which the interconnection applications were placed into the study track.

(3) An individual study process must consist of a system impact study pursuant to R 460.960 and facilities study pursuant to R 460.962. The Cooperative may waive 1 or both studies for a particular interconnection application. The Cooperative may specify additional studies it may perform on an interconnection application in its interconnection procedures, provided the Cooperative is able to meet all applicable timelines associated with an individual study process.

(4) Interconnection applications that meet all the following requirements must be admitted into an individual study:

- (a) The Cooperative determined the application to be complete and conforming.
- (b) The application qualifies for study track.
- (c) The interconnection application has a pre-application report.
- (d) An applicant has paid all required fees.
- (e) An applicant has signed and returned an individual study agreement.

B. Scoping Meeting For Interconnection Applications That Are To Be Studied Individually

(1) This procedure applies only to those interconnection applications proceeding pursuant to an individual study agreement.

(2) Upon request of the applicant, the Cooperative and the applicant shall schedule a scoping meeting between the Cooperative and the applicant to discuss the interconnection application and review existing fast track results, if any. The scoping meeting must take place **within 45 business days** after the interconnection application

is considered complete by the Cooperative or, if applicable, the fast track has been completed and the applicant has elected to continue with the system impact study or facilities study.

(3) Scoping meetings are limited to 1 hour per application. Multiple applications by the same applicant may be addressed in the same meeting.

(4) The scoping meeting may occur in-person or via telecommunications.

(5) During the scoping meeting, the Cooperative shall identify and communicate to the applicant whether the applicant must proceed to a system impact study, a facilities study, or an interconnection agreement and the basis for that decision, and one of the following must occur:

- (a) If a system impact study must be performed, the interconnection application proceeds to R 460.960.
- (b) If a facilities study must be performed, the interconnection application proceeds to R 460.962.
- (c) The interconnection application must proceed to R 460.964 for an interconnection agreement.

C. System Impact Study Agreement, Scope, Procedure, And Review Meeting

(1) For all DERs being studied individually, all the following apply:

- (a) The Cooperative shall provide the applicant a system impact study agreement **within 25 business days** of proceeding to this rule.
- (b) A system impact study agreement must include all the following:
 - (i) An outline of the scope of the study.
 - (ii) The applicable fee, including appropriate credit for any studies previously completed pursuant to the fast track or non-export track.
 - (iii) If necessary, a list of any additional and reasonable technical data needed from the applicant to perform the system impact study.
 - (iv) A timeline for completion of the system impact study.
 - (v) A list of the information that must be provided to the applicant in the system impact study report.

- (c) An applicant who has requested a system impact study shall return the completed system impact study agreement, provide any additional technical data requested by the Cooperative, and pay the required **fee within 20 business days**. The Cooperative may consider the application withdrawn if the system impact study agreement, payment, and required technical data are not returned **within 20 business days**.
- (d) A system impact study must identify and describe the electric system impacts that would result if the proposed DER were interconnected without electric system modifications. A system impact study must provide a non-binding good faith list of facilities that are required as a result of the application and non-binding estimates of costs and time to construct these facilities.
- (e) If the Cooperative determines during the system impact study process that an affected system issue arises due to the DER then the Cooperative shall notify the applicant and place a hold status regarding the interconnection study timelines while the affected system performs its study. An affected system may include, but is not limited, to neighboring utilities as well as upstream regional transmission operators and independent system operators. The Cooperative shall coordinate with the affected system to provide information on the DER to the affected system so that the affected system can provide the scope, costs, and lead times of any upgrades required on the affected system. The Cooperative will include the results of the affected system study into the Cooperative's study report and resume the timeline for completing the Cooperative's study.
- (f) The Cooperative shall complete the system impact study and the system impact study report. If necessary, the Cooperative shall transmit a facilities study agreement to the **applicant within 85 business days** of receipt of the signed system impact study agreement, payment of all applicable fees, and any necessary technical data.
- (g) The Cooperative may request reasonable additional data from the applicant **within 20 business days** of beginning the system impact study. The Cooperative and the applicant shall work together to resolve the additional data request so that the Cooperative will be able to complete the system impact study within 70 business days as specified in subdivision (a) of this subrule.
- (h) **Within 15 business days** of receiving the system impact study report, the applicant shall notify the Cooperative that it plans to pursue a system impact study review meeting, proceed to facilities study pursuant to R 460.962, or withdraw the application. If the applicant fails to notify the Cooperative **within 15 business days**, the Cooperative may consider the application to be withdrawn.

- (i) Upon request by the applicant pursuant to subdivision (c) of this subrule, the Cooperative and the applicant shall schedule a system impact study review meeting between the Cooperative and the applicant to review system impact study results and determine what further steps are needed to permit the DER to be connected safely and reliably to the distribution system. The system impact study review meeting must take place **within 50 business days** of the Cooperative receiving notification that the applicant plans to attend a system impact study review meeting.
- (j) At the system impact study review meeting, the Cooperative shall offer the applicant all the following options:
 - (i) Proceed to facilities study pursuant to R 460.962.
 - (ii) Proceed directly to R 460.964 for an interconnection agreement.
 - (iii) Withdraw the interconnection application.
- (k) Following the meeting, the applicant has **not more than 45 business days** to decide on a course of action. If an applicant fails to notify the Cooperative **within 45 business days**, the Cooperative may consider the application to be withdrawn.
- (l) The system impact study review meeting may occur in-person or via telecommunications.

D. Facilities Study Agreement, Scope, Procedure; Review Meeting

- (1) For DERs being studied individually, all the following apply:
 - (a) If construction of facilities is required to provide interconnection and interoperability of the DER with the Cooperative’s distribution system, the Cooperative shall provide the applicant a facilities study agreement and the results of the applicant’s system impact study pursuant to R 460.960, if applicable. The Cooperative shall provide a facilities study agreement **within 35 business days of proceeding** to this rule.
 - (b) The facilities study agreement must include the following:
 - (i) An outline of the scope of the study.
 - (ii) The applicable fee, including appropriate credit for any studies previously completed pursuant to the fast track or non-export track.
 - (iii) A timeline for completion of the facilities study.
 - (iv) A list of the information that will be provided to the applicant in the facilities study report.
 - (c) The applicant shall return the signed facilities study agreement and pay the required facilities study fee **within 20 business days**. The Cooperative may withdraw the application if the facilities study agreement and payment are not returned **within 20 business days**.
 - (d) A facilities study must specify and estimate the cost of the required equipment, engineering, procurement, and construction work, including overheads, needed to interconnect the DER, and an

- estimated timeline for the completion of construction. The Cooperative shall provide cost estimates that are detailed and itemized.
- (e) If the Cooperative determines during the facility study process that an affected system issue arises due to the DER then the Cooperative shall notify the applicant and place a hold status regarding the interconnection study timelines while the affected system performs its study. An affected system may include, but is not limited, to neighboring utilities as well as upstream regional transmission operators and independent system operators. The Cooperative shall coordinate with the affected system to provide information on the DER to the affected system so that the affected system can provide the scope, costs, and lead times of any upgrades required on the affected system. The Cooperative will include the results of the affected system study into the Cooperative's study report and resume the timeline for completing the Cooperative's study.
 - (f) The Cooperative shall complete the facilities study and transmit a facilities study report to the applicant **within 105 business days** of the receipt of the signed facilities study agreement and payment of the facilities study fee. The 90 business daytime frame may be affected by the Cooperative needing to notify its Generation and Transmission service providers who in turn may require studies and payment of study fees. If the DER did not pass the minimum load screen, upgrades may be required for substation or transmission facilities. The Cooperative shall request a Facilities Study be completed by the G&T or transmission provider. G&T or transmission provider shall submit a report back to the Cooperative within 120 business days of receipt of study pre-payment its fees.
 - (g) **Within 10 business days** of receiving a facilities study report from the Cooperative, the applicant shall select 1 option from the following options:
 - (i) Request a facilities study review meeting with the Cooperative.
 - (ii) Proceed to an interconnection agreement pursuant to R 460.964.
 - (iii) Withdraw the interconnection application. If the applicant fails to inform the Cooperative **within 10 business days** of its chosen course of action, the Cooperative may consider the application withdrawn.
 - (h) Upon request by the applicant pursuant to subdivision (b)(i) of this subrule, the Cooperative and the applicant shall schedule a facilities study review to review the facilities study results and determine what further steps are needed to permit the DER to be connected safely and reliably to the distribution system. The facilities study review meeting must take place **within 50 business days** of the Cooperative receiving notification that the applicant will attend a facilities study review meeting.

- (i) At the facilities study review meeting, the Cooperative shall offer both of the following options:
 - (i) Proceed to an interconnection agreement pursuant to R 460.964.
 - (ii) Withdraw the interconnection application.
- (j) Following the meeting, the applicant has **no more than 20 business days** to decide on a course of action and notify the Cooperative of this course of action. If the applicant fails to notify the Cooperative **within 20 business days**, the Cooperative may withdraw the application.
- (k) The facilities study review meeting may be conducted in-person or via telecommunications.

8. INTERCONNECTION AGREEMENT

(1) For level 1, 2, or 3 interconnection applications, where no construction of interconnection facilities or distribution upgrades is required, the Cooperative shall transmit its standard level 1, 2, and 3 interconnection agreement, which may include modifications to address any special operating conditions, to an applicant **within 28 business days** of reaching this stage.

(2) For level 1, 2, or 3 interconnection applications, where construction of interconnection facilities or distribution upgrades is required, the Cooperative shall provide its standard level 1, 2, and 3 interconnection agreement with modifications to address any special operating conditions, required construction activities, estimated construction milestone timing, and estimated cost to an applicant **within 30 business days** of reaching this stage. The applicant and Cooperative shall mutually agree on the timing of construction milestones.

(3) For an applicant with level 1, 2, or 3 interconnection applications, the applicant shall sign and return the standard level 1, 2, and 3 interconnection agreement with payment, if applicable, within **20 business days** of receiving the agreement.

- (a) If the applicant did not sign and return the standard level 1, 2, and 3 interconnection agreement and payment, if applicable, within **20 business days**, the Cooperative shall notify the applicant of the missed deadline and grant **an extension of 15 business days**. If the Cooperative did not receive the signed standard level 1, 2, and 3 interconnection agreement and any applicable payment **during the 15-business-day extension**, the Cooperative may consider the interconnection application withdrawn subject to subdivision (b) of this subrule.
- (b) If the applicant begins either the informal mediation pursuant to R 460.904, the formal mediation pursuant to R 460.906, or the complaint process pursuant to R 792.10439 to R 792.10446 **within the 20 business days**, the outcome of that process must establish a time frame for the applicant to return the signed interconnection agreement and any applicable payment.

(4) For level 1, 2, or 3 projects, the Cooperative shall countersign and provide a completed copy of the standard level 1, 2, and 3 interconnection agreement **within 35 business days** of the applicant returning the signed standard level 1, 2, and 3 interconnection agreement and the interconnection application shall proceed to R 460.966.

(5) For level 4 or 5 projects, the Cooperative shall provide its level 4 and 5 interconnection agreement, which may include modifications to address any special operating conditions, **within 40 business days** of reaching this stage. When construction of interconnection facilities or distribution upgrades is necessary, the level 4 and 5 interconnection agreement must contain either estimated timelines for completion of activities and estimates of construction costs or a timetable when these requirements can be determined. The interconnection agreement must include a payment schedule that corresponds to the milestones established and must require the Cooperative to refund any unspent and unobligated funds if the agreement is terminated.

(6) For an applicant with level 4 or 5 DERs, the applicant shall sign and return with payment, if applicable, a level 4 and 5 interconnection agreement **within 30 business days**.

- (a) If the applicant does not sign and return the level 4 and 5 interconnection agreement with payment **within 30 business days**, the Cooperative shall notify the applicant of the missed deadline and grant an **extension of 15 business days**. If the Cooperative does not receive the signed level 4 and 5 interconnection agreement and payment, if applicable, **during the 15-business-day extension**, the Cooperative may consider the interconnection application withdrawn, subject to subdivision (b) of this subrule.
- (b) If the applicant begins either the informal mediation pursuant to R 460.904, formal mediation pursuant to R 460.906, or the complaint process pursuant to R 792.10439 to R 792.10446 **within 30 business days**, the outcome of that process must establish a time frame for the applicant to return the signed interconnection agreement and applicable payment. There is a rebuttable presumption in the complaint proceeding that the Cooperative's standard construction, procurement, installation, design, and cost practices are lawful, reasonable, and prudent.
- (i) For study track interconnection applications filed with the Cooperative conducting individual studies, electrically coincident applications filed after the interconnection application must be placed on hold for **not more than 85 business days**. If either informal mediation pursuant to R 460.904, formal mediation pursuant to R 460.906, or the complaint process pursuant to R 792.10439 to R 792.10446 does not result in the applicant returning a signed interconnection agreement with any applicable payment **within 60 business days** and there are electrically coincident interconnection applications in progress behind this application, the Cooperative may require the withdrawal of the interconnection application.

(7) For level 4 or 5 projects, the Cooperative shall countersign and provide a completed copy of the level 4 and 5 interconnection agreement **within 35 business days** of the applicant returning a mutually agreed-upon and signed level 4 and 5 interconnection agreement and the interconnection application shall proceed to R 460.966.

(8) An applicant shall pay the actual cost of the interconnection facilities and distribution upgrades. The cost to the applicant for interconnection facilities and distribution upgrades may not exceed 110% of the estimate without an itemized summary and explanation of cost increases being provided to the applicant prior to being incurred. If costs are expected to exceed 125% of the estimate, the Cooperative shall provide further explanation to the applicant prior to the costs being incurred. If the applicant does not consent in writing to pay the additional costs within 20 business days of receiving further explanation from the Cooperative, the Cooperative shall initiate informal mediation pursuant to R 460.904 no later than 35 business days after the conclusion of the 20-business day applicant consent period. The applicant may dispute the expected costs pursuant to either informal mediation pursuant to R 460.904, formal mediation pursuant to R 460.906, or the complaint process pursuant to R 792.10439 to R 792.10446. If there is a dispute, the applicant shall make payment within 30 business days of final resolution of the dispute.

(9) A party's obligations under the interconnection agreement may be extended by agreement. If a party anticipates that it will be unable to meet a milestone for any reason other than an unforeseen event, the party shall do all the following:

- (a) Immediately notify the other party of the reason or reasons for not meeting the milestone.
- (b) Propose the earliest alternate date when it can attain this and future milestones.
- (c) Request amendments to the interconnection agreement, if needed to address the changed milestones.

(10) The party affected by the failure to meet a milestone shall not withhold agreement to any amendments proposed in subrule (9)(c) of this rule unless 1 of the following applies:

- (a) The party affected will suffer significant uncompensated economic or operational harm from the amendment or amendments.
- (b) The milestone under question has been previously delayed.
- (c) The affected party has reason to believe that the delay in meeting the milestone is intentional or unwarranted notwithstanding the circumstances explained by the party proposing the amendment.

(11) If the party affected by the failure to meet a milestone disputes the proposed extension, the affected party may pursue either informal mediation pursuant to R 460.904, formal mediation pursuant to R 460.906, or the complaint process pursuant to R 792.10439 to R 792.10446.

(12) The Cooperative shall provide the applicant with a final accounting report of any difference between costs charged to the applicant and previous payments to the Cooperative for interconnection facilities or distribution upgrades. Both of the following apply regarding the final accounting:

- (a) If the costs charged to the applicant exceed its previous aggregate payments, the Cooperative shall bill the applicant for the amount due and the applicant shall make a payment to the Cooperative **within 20 business days** of the final accounting report. The applicant may dispute the invoice pursuant to either informal mediation pursuant to R 460.904, formal mediation pursuant to R 460.906, or the complaint process pursuant to R 792.10439 to R 792.10446. If there is a dispute, the applicant shall make payment **within 30 business days** of final resolution of the dispute. Failure by the applicant to pay its costs is cause for disconnection of the applicant's DER.
- (b) If the applicant's previous aggregate payments exceed its costs under the interconnection agreement, the Cooperative shall refund to the applicant an amount equal to the difference **within 45 business days** of the final accounting report.

(13) The Cooperative is responsible for specifying requirements in interconnection agreements to support independent system operator regulations or regional transmission operator regulations.

(14) The Cooperative may propose to the commission that a signed interconnection agreement be modified to require compliance with changes to an independent system operator, a regional transmission operator, or the state's regulations. Unless the Cooperative has the consent of the applicant or interconnection customer in writing, the Cooperative shall not modify a signed interconnection agreement without commission approval.

9. INSPECTION, TESTING, AND COMMISSIONING

(1) The Cooperative will rely upon its own telecommunications, cybersecurity, data exchange or remote controls.

(2) An applicant shall notify the Cooperative when installation of a DER and any required local code inspection and approval is complete. The applicant shall provide any test reports or configuration documents as defined in the standard level 1, 2, and 3 interconnection agreement or level 4 and 5 interconnection agreement.

(3) The Cooperative shall review the applicant's inspection, test reports, or configuration documents, and communicate its intent to perform a witness or commissioning test or waive its right to perform a witness test and commissioning test **within 35 business days**. If the Cooperative finds the applicant's inspection, test reports, or configuration documents to be incomplete, insufficient, or unsatisfactory, the Cooperative shall provide its reasons for doing so in writing and the applicant shall have at least 20 business days or a mutually agreed upon timeframe with the utility to implement corrections to those documents. The applicant, after taking corrective action, shall request the Cooperative to reconsider its inspection, test reports, or configuration documents.

(4) Subsequent to completion of the items in subrule (3), if the Cooperative intends to witness or perform commissioning tests required to comply with the interconnection agreement or the interconnection procedures and inspect the DER, the Cooperative shall witness or perform the commissioning tests and inspect the DER within either of the following:

- (a) **Thirty-five business days of receiving** the notification from the applicant pursuant to completion of subrules (2) and (3) of this rule, for level 1, 2, and 3 applications.
- (b) A mutually agreed upon timeframe after receiving the notification from the applicant pursuant to subrules (2) and (3) of this rule for level 4 and 5 applications.

(5) The Cooperative may waive its right to visit the site and inspect the DER or perform the commissioning tests. If the Cooperative waives this right, both of the following apply:

- (a) It shall provide a written waiver to the applicant **within 35 business days** from receiving the notification from the applicant pursuant to subrule (2) of this rule.
- (b) The applicant shall provide the Cooperative with the completed commissioning test report **within 10 business days** of receipt of the Cooperative's written waiver.

(6) If the Cooperative attempts to conduct the inspection and testing pursuant to subrule (4) of this rule at the arranged time and is unable to access the DER or complete the testing, the DER must remain disconnected until the applicant and the Cooperative can complete the inspection and testing.

(7) If the Cooperative witnessed or performed commissioning tests and inspected the DER pursuant to subrule (4) of this rule, **within 30 business days** of the receipt of the completed commissioning test report, the Cooperative shall notify the applicant whether it has accepted or rejected the commissioning test report and found the site to be satisfactory or unsatisfactory.

- (a) If the commissioning test report is accepted and the site was found satisfactory, the Cooperative shall provide the notification of acceptance in writing, and the interconnection application proceeds to R 460.968.
- (b) If the Cooperative rejects the commissioning test report or did not find the site satisfactory, the Cooperative shall provide its reasons for doing so in writing and the applicant has not less than **45 business days** to implement corrections. The applicant, after taking corrective action, shall request the Cooperative to reconsider its findings. The applicant may be billed the actual cost of any re-inspections.

(8) If the Cooperative waived its right to witness or perform commissioning tests and inspect the DER pursuant to subrule (5) of this rule, **within 30 business days** of the receipt of the completed commissioning test report, the Cooperative shall notify the applicant whether it has accepted or rejected the commissioning test report as follows:

- (a) If the commissioning test report is accepted, the Cooperative shall provide notification of acceptance, and the interconnection application proceeds to R 460.968.
- (b) If the Cooperative rejects the commissioning test report, the Cooperative shall provide its reasons for doing so in writing and the applicant has not less than 20 business days to implement corrections. The applicant, after taking corrective action, may then request the Cooperative to reconsider its findings.

(9) If the applicant does not notify the Cooperative that the DER is installed and ready to test pursuant to above paragraph (2), the Cooperative may, in writing, query the status of the interconnection. If the applicant does not provide a written response **within 10 business days** or no progress is evident, the Cooperative may consider the interconnection application withdrawn.

10. PARALLEL OPERATION

(1) The Cooperative shall provide to the applicant written authorization to operate in parallel with the Cooperative within 30 days of the following conditions being met:

- (a) The Cooperative notified the interconnection application that the commissioning test and inspection, where applicable, are accepted.

- (b) The applicant has executed a standard level 1, 2, 3, 4, or 5 interconnection agreement and complied with all applicable parallel operation requirements set forth in the Cooperative's interconnection procedures and applicable interconnection agreement.
- (c) The applicant complied with all applicable local, state, and federal requirements.
- (d) The Cooperative received full payments for all outstanding bills.

(2) With the written authorization, interconnection of the DER is considered approved for parallel operation, the DER may begin operating, and the applicant is considered an interconnection customer.

(3) The applicant shall not operate its DER in parallel with the Cooperative's distribution system without prior written permission to operate from the Cooperative.

(4) Subject to reasonable timing and other conditions, including completion of conditions in the interconnection agreement or interconnection procedures, the Cooperative shall allow for reasonable but limited testing before written authorization has occurred.

11. COOPERATIVE-OWNED DERs

(1) The Cooperative shall comply with, R 460.911 to R 460.992, and its interconnection procedures when interconnecting DERs that it owns and operates onto its distribution system, except for temporary DERs and substation backup batteries.

(2) The Cooperative shall use the same process when processing and studying interconnection applications from all applicants, whether the DER is owned or operated by the Cooperative, its subsidiaries or affiliates, or others, except for temporary DERs and substation backup batteries.