

# Distributed Energy Resources (DER) Connections Review

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EB-2019-0207

Working Group Meeting

August 22, 2022

# Land Acknowledgement

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The Ontario Energy Board acknowledges that our headquarters in Toronto is located on the traditional territory of many nations including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee and the Wendat peoples. This area is now home to many diverse First Nations, Inuit and Métis peoples. We also acknowledge that Toronto is covered by Treaty 13 with the Mississaugas of the Credit.

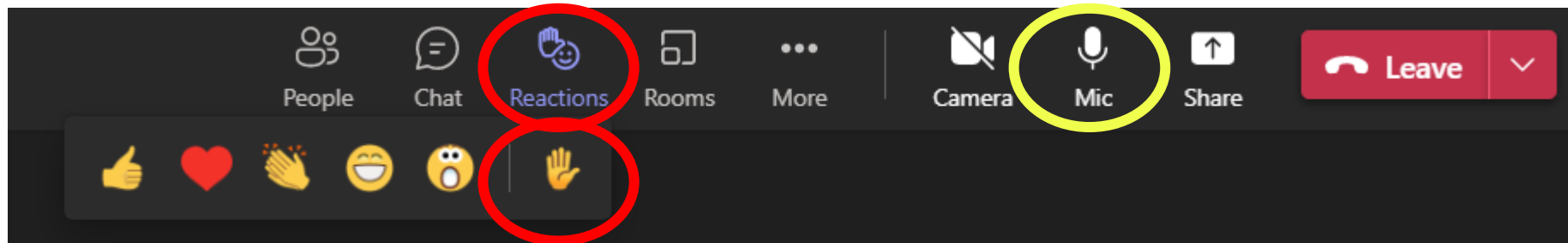
We are grateful for the opportunity to gather and work on this land and recognize our shared responsibility to support and be good stewards of it.

# MS Teams – Mute and Raise Hand Feature

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Please kindly mute microphone when not speaking.

Please use the Raise Hand feature (under the “Reactions” control) if you would like to speak during the meeting, and the presenter or OEB staff will call upon you.



When speaking, please start with your name and organization.

# Agenda

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<b>No.</b>	<b>Discussion Item</b>	<b>Start</b>	<b>Duration</b>
1.	Land Acknowledgement	1:00pm	5 mins
2.	Staff Update	1:05pm	5 mins
3.	FEI Update (in-meeting note: postponed to October)	1:10pm	15 mins
4.	Hydro One Transfer Trip Update	1:25pm	15 mins
5.	Process Subgroup Recommendations	1:40pm	45 mins
6.	Break	2:25pm	15 mins
7.	Technical Subgroup Recommendation (Uni-Directional EV)	2:40pm	30 mins
8.	Risk Framework Update	3:10pm	10 mins
9.	Open Discussion	3:20pm	25 mins
10.	Next Steps	3:45pm	15 mins

# Staff Update

Meeting on 22 August 2022

# Status of Tranche 4 Areas of Review

Topic Area	Status
<b>Process: RRR Requirements</b>	<b>Subgroup Proposal Finalized</b>
Process: Connection Cost Estimating	Subgroup Proposal in Development
Process: Connection Deposit Refund Timelines	Subgroup Proposal in Development
<b>Process: Capacity Allocation Exemption</b>	<b>Subgroup Proposal Finalized</b>
<b>Process: Capacity Deposits</b>	<b>Subgroup Proposal Finalized</b>
<b>Technical: Expanded EV Issues List for Connections</b>	<b>Subgroup Proposal Finalized</b>
Technical: Risk Framework Development	Subgroup Proposal in Development

# Plan for Today

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## Items for Working Group Review & Finalization

The following are ready for review and finalization by the working Group:

- Process:
  - RRR;
  - CAE;
  - Capacity Deposits.
- Technical:
  - EV Issues List Augmented for Uni-Directional Connections.

## Items Under Development by Subgroup

The following are under development and not on today's agenda:

- Process:
  - Connection Cost Estimating;
  - Connection Deposit Refund Timelines.
- Technical:
  - Risk Framework.

## Open Discussion on Additional Priorities

- Limited time for open discussion on subjects outside of Tranche 4, which will be discussed in September WG meeting.

# Plan for Balance of Tranche 4

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- By September 2022, expect to close remaining recommendations.
- By October 2022, expect to confirm the desire to continue with Tranche 5 to address any additional issues.



# FEI Update

Postponed to next meeting

# Transfer Trip Update by Hydro One

Presentation by Adnan Akhtar (Hydro One)

*Please refer to accompanying file*

# Process: RRR Proposal

Process Subgroup Topic 1

Presentation by Larry Herod (Stem & Enel X) & Andrew Houston (Alectra)

*Please refer to accompanying file*

# Overview of RRR Proposal

Context	Recommendation	Anticipated Benefit
Non-NM DER Information Collected in Aggregate Only	Revise RRR for Non-NM DER to include <b>breakout by DER type</b>	Better visibility on type of DER installed in territory
Rate Class of NM Customers Not Reported in RRR	No action – other means seen as better-suited to obtaining information	N/A
Percent of Customers on Restricted Feeders Not Reported	Consider issue in context of RRR and non-RRR proposals	Additional time to develop optimal proposal
Question on Whether RRR Includes Total MW of DER	No action – existing RRR allows calculation	N/A

# RRR Proposal (1 of 2)

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The Subgroup proposes that RRR section 2.1.14 should be revised to require the following:

A distributor shall provide, annually by April 30, the following net metering and embedded generation information for the preceding calendar year (**material changes in red**):

- a) For net metered generators:
  - i. Number of generators by renewable energy source;
  - ii. Total installed capacity (kW) by renewable energy source; and
  - iii. Total installed capacity (kW) of storage devices used by net metered generators by renewable energy source;
- b) For embedded generation facilities excluding net metered generators:
  - i. Number of generators **by facility type (solar, wind, water, biomass, fossil fuel, exporting storage, non-exporting storage, other)**;
  - ii. Total installed capacity (kW) **by facility type (solar, wind, water, biomass, fossil fuel, exporting storage, non-exporting storage, other)**;

# RRR Proposal (2 of 2)

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The Subgroup proposes:

- That, in future meetings, it be permitted to review potential reporting requirements related to “percent of customers on restricted feeders”. Discussions to-date found challenges in collecting this information, and loss of context in reporting a single figure; however, there was a desire to revisit the issue more broadly and determine whether a recommendation would be warranted, for example related to RRR, a referral to filing requirements staff, or some other proposal.

The Subgroup further notes:

- That it does not recommend a RRR requirement related to reporting of the type of net metered customers, since this can be obtained through other avenues and may not be needed on a recurring basis.
- That it does not see a need to recommend an additional RRR requirement on “installed capacity of DER” since this is captured in RRR section 2.1.14.

# Process: Capacity Allocation Exemption Proposal

Process Subgroup Topic 4

Presentation by Jason Savulak (Hydro One)

*Please refer to accompanying file*

# Overview of CAE Proposal

## Context

- DSC established “Capacity Allocation Exempt” facilities, which do not follow a distributor’s normal capacity allocation process.
- CAE established in 2009 to expedite smaller connections, which at the time were assessed to be fewer in number.
- Subgroup believes context has changed due to an increased number of smaller facility applications and higher DER penetration levels.
- Subgroup believes that the existing CAE requirements are not practical nor appropriate.

## Recommendation

- Eliminate CAE designation and associated requirements from the DSC.

## Anticipated Benefit

- Improve simplicity and practicality, having all projects greater than 10 kW follow the same process for capacity allocation.
- Align process with anticipated growth in smaller connections.



# Process: Capacity Deposits Proposal

Process Subgroup Topic 5

Presentation by Larry Herod (Stem & Enel X)

*Please refer to accompanying file*

# Overview of Capacity Deposit Proposal

## Context

- For exporting projects\* that do not hold an IESO contract that itself contains provisions for a security deposit, a capacity deposit of \$20k/MW is required at CCA signing, and after 15 months a further deposit is required if not already connected.
- Requirement was set in 2009 to ensure viable projects are not impeded by projects unlikely to proceed.
- Subgroup questioned practical effectiveness of provisions.

## Recommendation

- Remove capacity deposit requirement.

## Anticipated Benefit

- Simplification of DSC requirements and removal of potential barrier, including for net metered projects.

\* Exporting provision becomes effective October 1, 2022.

# Break

# Technical: EV Issues List for Uni-Directional Chargers

Technical Subgroup Topic 1

Presentation by Jordan Hoogendam (Zon Engineering), Kent Elson (Environmental Defence), & Adnan Akhtar (Hydro One)

*Please refer to accompanying files*

# Bi-Directional EV Charger Connection Issues

## Technical Challenge

- Bi-directional chargers can increase the total nameplate of installed DER at a connection point beyond the **micro limit** of 10 kW.
- LDC may not have **visibility** on all EV deployments (uni- or bi-directional).
- Certification **standards** for stationary and mobile inverters fall under different jurisdictions.

## Application Challenge

- Application **forms** do not explicitly list bi-directional EVs.
- CIA **application cost** can be prohibitive for 10-30 kW installations.
- **Requirement** for CIA may not be clearly understood for cases with incremental deployments (e.g. several <10kW facilities deployed over time).

## Connection Cost Challenge

- **Baseline connection costs\*** can be prohibitive for projects <30kW.
- **System upgrade** costs may impact viability, particularly when costly upgrades are triggered by incrementally small facilities.

\* For the present discussion, baseline connection costs refers to standard process and infrastructure costs that are incurred for all projects, even when system upgrades are not required.

# Uni-Directional EV Charger Connection Issues

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## Data

- Utilities do not have visibility on all EV deployments in a given area.

## Connection Costs

- Utility-side costs required to enable panel upgrades (e.g. to 200 amps) needed for EV chargers may raise fairness and cost allocation issues, result in unnecessary transaction costs, and may be applied differently between utilities
- There may be opportunities to have EV energy management (e.g. load control) to avoid service upgrades.

## Out-of-Scope Issues

- Several planning and operations issues were identified that are out of scope for the DER Connections Review, but the Technical Subgroup captured them for information.

# Potential Areas of Exploration

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- **Uni-Directional**

- **EV Connection Costs:** Should panel upgrades to, say, 200 amps be considered part of the basic residential service paid for in rates (including the cost of any transformer upgrades that might be triggered)?
- **EV Data:** What steps can be taken to provide additional data on electric vehicle penetration to utilities, such as:
  - OEB working with ESA to facilitate Distributor access to ESA data on EV deployments.
  - OEB working with ministries to consider whether information sharing related to vehicle registrations can inform assessments of EV charger loads.
  - Distributors continuing to use smart meter data and artificial intelligence to determine EV deployments.

- **Bi-Directional**

- **Micro Threshold:** The merits of adjusting the micro size threshold for DERs, above the existing 10 kW.
- **Export Control:** The merits of establishing a simplified CIA for projects up to 50 kW, to streamline their assessment for connection.
- **Simplified CIA for Systems up to ~50 kW:** The ways in which export controls may reduce the evaluated size for a connection application, to either eliminate or simplify CIA study requirements and costs.

# Risk Framework Update

Presentation by Nishant Gehani (BBA), Larry Herod (Stem & Enel X), and Bob Braletic (Alectra)



# Risk Framework Small Group – Key Takeaways

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- Focused on Stage 1 objective of providing early indication of connection complexity.
- General agreement that potential applicants would benefit from connection-specific information, including likely technical requirements that would have a cost impact, subject to completion of an actual CIA.
- General agreement to use PCR as vehicle to communicate information.
- Associated guide expected to be prepared with additional information.

# Information Expected to be in PCR

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PCR proposed to qualitatively report on anticipated project cost/complexity, based on anticipated connection features:

- Generator size and type
- Thermal constraints
- Short circuit constraints
- Upgrades to feeder
- Upgrades to transformer
- Reconductoring of feeder
- Remote monitoring
- Metering upgrades
- Protection upgrades
- Transfer trip
- Requirement for SIA

PCR does not reflect definitive results, which would only be available after a CIA is performed.

# Information Expected in Accompanying Guide

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- Explanation of PCR-listed technical requirements.
- Brief background on purpose of technical requirement.
- Discussion of connection features that raise or mitigate risk that a technical requirement would be imposed.

# Preliminary Consultation Information Request (Draft)

X

**Distributed Energy Resource (DER) Connection**  
**Preliminary Consultation Information Request (PCIR)**  
OEB Template Version A.J  
 LDC Template Version (By LDC)

**1. Instructions**  
 Customers are to obtain this workbook from their LDC's website, complete the worksheet "PCIR", and submit the editable MS Excel file to the LDC in accordance with the instructions provided on the LDC website. All fields are required, unless otherwise noted.

**2. Local Distribution Company (LDC) Contact Information**

**2.01 Contact Information**

A. LDC Name	-	Completed by LDC
B. Department Name	-	Completed by LDC
C. Department Address	-	Completed by LDC
D. Department City & Postal Code	-	Completed by LDC
E. Department Fax	-	Completed by LDC Optional
F. Department Phone	-	Completed by LDC
G. Department Email	-	Completed by LDC

**3. General**

**3.01 Application Information**

A. Project Name	-	-
B. Application Submission Date	Date	YYYY-MM-DD

**3.02 Applicant Information**

A. Applicant (Company Name)	-	-
B. Applicant Type	-	-
C. Applicant Representative (Individual Name)	-	-
D. Applicant Address	-	Corporate Address
E. Applicant City	-	-
F. Applicant Postal Code	-	-
G. Applicant Fax	-	Optional
H. Applicant Phone	-	-
I. Applicant Email	-	-

**4. Project Information**

**4.01 Project Nameplate & Type**

A. Proposed Capacity	kW	-
B. Connection Type (Single/Three-Phase)	-	-
C. Inverter-Based/Non-Inverter Based	-	-
D. Exporting/Non-Exporting	-	-
E. Islanding Capability	-	Indicate if capable of islanding from grid.

**4.03 Proposed DER Fuel/Energy Type**

A. Solar	-	-
B. Wind	-	-
C. Water (Hydroelectric)	-	-
D. Biofuel/Biogas	-	-
E. Thermal	-	Other than biofuel
F. Energy Storage	-	-
G. Other	Specify	Enter specific technology type

Continues...

Filename: Draft - DER PCIR and PCR - Rev J - 2022-08-08  
 Worksheet: PCIR

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X

**Distributed Energy Resource (DER) Connection**  
**Preliminary Consultation Information Request (PCIR)**  
OEB Template Version A.J  
 LDC Template Version (By LDC)

**5. Site Information**

**5.01 Existing Account Holder**

A. Existing Account Number (if Applicable)	-	-
B. Existing Account Holder Name (if Applicable)	-	-

**5.02 Site Information**

A. Site Address	-	-
B. Site City/Town/Township	-	-
C. Site Postal Code	-	-
D. Site GPS Coordinates	-	-

**5.03 Existing DER at Site**

A. Existing DER Capacity (if Applicable)	kW	-
B. Existing DER Connection (Single/Three-Phase)	-	-
C. Existing DER Type (Inverter/Non-Inverter)	-	-
D. Existing DER Intent (Exporting/Non-Exporting)	-	-

Required if existing LDC installed.

**6. Other Information**

**6.01 Other Information**

A. Customers are free to provide any additional information that they believe may be beneficial for the purpose of obtaining a preliminary assessment.

B. If providing accompanying documents, please list them below. Accompanying documents may or may not inform the preliminary consultation.

**7. LDC Office Use Only**

**7.01 PCIR Status**

A. Date Received	Date	Completed by LDC
B. Date Returned Incomplete	Date	Completed by LDC
C. Date Received & Deemed Complete	Date	Completed by LDC
E. Date Preliminary Consultation Report Issued	Date	Completed by LDC
F. Application ID Assigned	ID	Completed by LDC

X

Subject to further development by Risk Framework Small Group and review by Technical Subgroup, prior to formal presentation to Working Group.

Filename: Draft - DER PCIR and PCR - Rev J - 2022-08-08  
 Worksheet: PCIR

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# Preliminary Consultation Report (Draft)

<p>X</p> <p><b>Distributed Energy Resource (DER) Connection Preliminary Consultation Report (PCR)</b>  <small>OEB Template Version A.J  LDC Template Version (By LDC)</small></p> <p><b>1. Disclaimer</b>  The Local Distribution Company (LDC) is providing this information to assist you in completing your Connection Impact Assessment based on information and records available at the time that process does not consider the full range of technical evaluation at this time. Capacity is only reserved upon completion of all requirements.</p> <p><b>2. Local Distribution Company (LDC) Contact Information</b></p> <p><b>2.01 Contact Information</b></p> <p>A. LDC Name  B. Department Name  C. Department Address  D. Department City &amp; Postal Code  E. Department Fax  F. Department Phone  G. Department Email</p> <p><b>3. General Application Information</b></p> <p><b>3.01 Administration</b></p> <p>A. Project ID  B. Project Name  C. Report Date</p> <p><b>3.02 Applicant Information</b></p> <p>A. Applicant (Company Name)  B. Applicant Representative Email</p> <p><b>3.02 Project Nameplate &amp; Type</b></p> <p>A. Proposed Capacity  B. Connection Type (Single/Three-Phase)  C. Inverter-Based/Non-Inverter Based  D. Exporting/Non-Exporting  E. Islanding Capability</p> <p><b>3.03 Proposed DER Fuel/Energy Type</b></p> <p>A. Solar  B. Wind  C. Water (Hydroelectric)  D. Biofuel/Biogas  E. Thermal  F. Energy Storage  G. Other</p> <p><b>3.04 Site Information</b></p> <p>A. Site Address  B. Site City/Town/Township  C. Site Postal Code  D. Site GPS Coordinates</p> <p><b>3.05 Existing DER at Site</b></p> <p>A. Existing DER Capacity (if Applicable)</p> <p>Filename: Draft - DER PCIR and PCR - Rev J - 2022-08-08  Worksheet: PCR</p>	<p>X</p> <p><b>Distributed Energy Resource (DER) Connection Preliminary Consultation Report (PCR)</b>  <small>OEB Template Version A.J  LDC Template Version (By LDC)</small></p> <p>B. Existing DER Connection (Single/Three-Phase)  C. Existing DER Type (Inverter/Non-Inverter)  D. Existing DER Intent (Exporting/Non-Exporting)</p> <p><b>4. Connection Overview</b></p> <p><b>4.01 Transmitter Assets</b></p> <p>A. Transmitter Name  B. Transformer Station  C. Feeder Designation  D. Feeder Voltage</p> <p><b>4.02 Host Distributor Assets (if Applicable)</b></p> <p>A. Host Distributor Name (if Applicable)  B. Host Distributor Station (if Applicable)  C. Host Distributor Feeder (if Applicable)  D. Host Distributor Feeder Voltage (if Applicable)</p> <p><b>4.03 LDC or Embedded Distributor Assets</b></p> <p>A. LDC Distribution Station (if Different from Host)  B. LDC Distribution Feeder (if Different from Host)  C. LDC Distribution Feeder Voltage</p> <p><b>4.04 Site Connection Information</b></p> <p>A. Site Dk Transformer Capacity  B. Connection Voltage  C. LDC Asset ID (if Applicable)</p> <p><b>5. Anticipated Studies and Fees</b></p> <p>If you proceed to apply for a CIA study, the following studies are required. Consult LDC website for instrumented studies.</p> <p><b>5.01 Anticipated Impact Assessments Required</b></p> <p>A. No CIA  B. LDC CIA  C. Host LDC CIA  D. Transmitter CIA  E. IESO System Impact Assessment</p> <p>Filename: Draft - DER PCIR and PCR - Rev J - 2022-08-08  Worksheet: PCR</p>	<p>X</p> <p><b>Distributed Energy Resource (DER) Connection Preliminary Consultation Report (PCR)</b>  <small>OEB Template Version A.J  LDC Template Version (By LDC)</small></p> <p><b>6. Preliminary Assessment of Connection Complexity (Based on Risk Framework)</b>  In order to provide an earlier indication of the anticipated complexity of a connection, these requirements are typically based on judgement or simplified criteria, and in consultation with upstream utilities, including host distributors and the transmitter. The full range of requirements set through the CIA process. In some cases, LDCs may have additional requirements.</p> <table border="1"> <thead> <tr> <th>No.</th> <th>Item</th> <th>Impact</th> <th>Preliminary Assessment</th> </tr> </thead> <tbody> <tr> <td colspan="4"><b>6.01 Proposed DER Characteristics</b></td> </tr> <tr> <td>A.</td> <td>DER Size</td> <td>-</td> <td></td> </tr> <tr> <td>B.</td> <td>DER Type (Inverter/Non-Inverter)</td> <td>-</td> <td></td> </tr> <tr> <td>C.</td> <td>DER Intent (Exporting/Non-Exporting)</td> <td>-</td> <td></td> </tr> <tr> <td colspan="4"><b>6.02 Station Constraints</b></td> </tr> <tr> <td>A.</td> <td>Thermal Constraints</td> <td>Ex. High</td> <td></td> </tr> <tr> <td>B.</td> <td>Short Circuit</td> <td>Ex. 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Site Distribution Transformer Upgrades	Medium		E.	Reconductoring of Branch/Tap	Medium		<b>6.04 Protection, Control, Metering, Telecom, Teleprotection</b>				A.	Protection Upgrades	High		B.	Remote Monitoring	Medium		C.	Metering Upgrades	Low		D.	Transfer Trip	High		<b>6.05 Additional Studies</b>				A.	Host Distributor CIA	Medium		B.	Transmitter CIA	Medium		C.	IESO System Impact Assessment	High		<b>6.06 LDC-Specific Criteria</b>				A.	Optional	TBD		B.	Optional	TBD		C.	Optional	TBD		<b>6.07 LDC Overall Assessment of Connection Complexity</b>				A. Anticipated Connection Complexity				<b>7. Overall Assessment</b>				<b>7.01 Overall Assessment of Anticipated Capacity</b>				A. LDCs articulate their initial assessment on available capacity to connect to the system.				<b>7.02 Other Comments by LDC</b>								<p>X</p> <p><b>Distributed Energy Resource (DER) Connection Preliminary Consultation Report (PCR)</b>  <small>OEB Template Version A.J  LDC Template Version (By LDC)</small></p> <p>A. LDCs are free to provide additional information not reported in the prescribed fields above (e.g. alternative switching, potential interconnection design suggestions, teleprotection and/or communication media, etc.)</p> <p>X</p> <p>Subject to further development by Risk Framework Small Group and review by Technical Subgroup, prior to formal presentation to Working Group.</p> <p>Filename: Draft - DER PCIR and PCR - Rev J - 2022-08-08  Worksheet: PCR</p>
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C.	Optional	TBD																																																																																																																																									
<b>6.07 LDC Overall Assessment of Connection Complexity</b>																																																																																																																																											
A. Anticipated Connection Complexity																																																																																																																																											
<b>7. Overall Assessment</b>																																																																																																																																											
<b>7.01 Overall Assessment of Anticipated Capacity</b>																																																																																																																																											
A. LDCs articulate their initial assessment on available capacity to connect to the system.																																																																																																																																											
<b>7.02 Other Comments by LDC</b>																																																																																																																																											

Subject to further development by Risk Framework Small Group and review by Technical Subgroup, prior to formal presentation to Working Group.

# Preliminary Consultation Report (Draft)

## ... 6. Preliminary Assessment of Connection Complexity (Based on Risk Framework Criteria)

In order to provide an earlier indication of the anticipated complexity of a connection, LDCs provide an initial assessment of likely connection requirements. These requirements are typically based on judgement or simplified criteria, and would be subject to change through the CIA process and through further consultation with upstream utilities, including host distributors and the transmitter. Further, this preliminary assessment does not evaluate the potential for the full range of requirements set through the CIA process. In some cases, LDCs may not have enough information to be able to provide an indication of a given requirement.

No.	Item	Impact	Preliminary Assessment	Comments
<b>6.01 Proposed DER Characteristics</b>				
A.	DER Size	-		<i>As provided by customer.</i>
B.	DER Type (Inverter/Non-Inverter)	-		<i>As provided by customer.</i>
C.	DER Intent (Exporting/Non-Exporting)	-		<i>As provided by customer.</i>
<b>6.02 Station Constraints</b>				
A.	Thermal Constraints	Ex. High		
B.	Short Circuit	Ex. High		
<b>6.03 Distribution System Infrastructure</b>				
A.	New Tap Line	High		
B.	Voltage Regulator Upgrade	Medium		
C.	Reconductoring of Existing Feeder Trunk	High		
D.	Site Distribution Transformer Upgrades	Medium		
E.	Reconductoring of Branch/Tap	Medium		
<b>6.04 Protection, Control, Metering, Telecom, Teleprotection</b>				
A.	Protection Upgrades	High		
B.	Remote Monitoring	Medium		
C.	Metering Upgrades	Low		
D.	Transfer Trip	High		
<b>6.05 Additional Studies</b>				
A.	Host Distributor CIA	Medium		<i>May impose additional requirements.</i>
B.	Transmitter CIA	Medium		<i>May impose additional requirements.</i>
C.	IESO System Impact Assessment	High		<i>May impose additional requirements.</i>
<b>6.06 LDC-Specific Criteria</b>				
A.	Optional	TBD		
B.	Optional	TBD		
C.	Optional	TBD		
<b>6.07 LDC Overall Assessment of Connection Complexity</b>				
A.	Anticipated Connection Complexity			<i>Preliminary assessment by LDC.</i>

Subject to further development by Risk Framework Small Group and review by Technical Subgroup, prior to formal presentation to Working Group.

# Open Discussion

# Open Discussion

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Seek industry feedback on:

- Areas of concern that have not been addressed.



# Next Steps

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- Subgroups continuing to advance additional recommendations.
- Next Working Group (October 4<sup>th</sup>) meeting will review balance of recommendations and allow for greater discussion on Working Group priorities.
- Subsequent Working Group meeting anticipated to close Tranche 4.

# Backup

# Key Principles of Engagement for DER Connections

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## Industry Need

- Need ongoing engagement with industry to ensure issues remain relevant and address current and future trends
- Need to ensure level of consultation is in-line with industry expectations

## Participation

- Working Group, with OEB staff facilitation, would have the following meetings:
  - Approx. bimonthly WG
  - Approx. monthly SG
  - Recurring or ad-hoc for others

## Deliverables

- Seek industry proposals for solutions
- Industry to strive for consensus recommendations, with dissents noted if needed
- Use Working Group meeting summaries to document recommendations, with dissents noted if needed

# Overview of Tranches

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## Tranche 1: Letters to Distributors

- Informational guidance to distributors, mainly related to preliminary consultations and sample technical documents

## Tranche 2: DSC Amendments & DERCP

- DSC Amendments to codify recommendations from Tranche 1, establish DERCP, and standardize templates and forms.

## Tranche 3: Metrics, Estimates, Risk, EVs

- RRR Requirements
- Cost Estimates
- Risk Framework
- Bi-Directional EVs