



BY EMAIL AND WEB POSTING

June 16, 2023

To: All Licensed Electricity Distributors
All Licensed Electricity Generators
All Licensed Electricity Storage Companies
All Participants in Consultation Process EB-2019-0207
All Other Interested Parties

**Re: Revisions to Distributed Energy Resources Connection Procedures
(DERCP) Appendix C
Distributed Energy Resources (DER) Connections Review (EB-2019-0207)**

The Ontario Energy Board (OEB) is making changes to Appendix C of the *Distributed Energy Resources Connection Procedures* ([DERCP](#)) as part of its ongoing [DER Connections Review](#) initiative. These changes will come into effect on September 18, 2023. The new information in the Appendix C will offer customers, who consider applying to connect a DER to a distribution system (i.e., applicants), valuable insights into potential connection complexities and risks related to available capacity, project costs and timelines. This additional information will enable customers to make more informed decisions before proceeding with formal connection requests.

I. Background

In March 2022, the OEB issued a [Notice of Amendments](#) to the Distribution System Code (DSC) to facilitate the connection of DERs. In that notice, the OEB also announced the establishment of the DERCP and associated new DSC provisions. These new provisions mandate the use of standardized template forms for the Preliminary Consultation Information Request (PCIR) submitted by customers and the responding Preliminary Consultation Report (PCR) prepared by distributors. Both template forms were included in Appendix C of the DERCP and came into effect on October 1, 2022.

The original PCIR form collected basic information about the proposed DER project such as contact information, project intent, size, type and location. The original PCR

form identified the feasibility of a connection based on distributor knowledge of available capacity at the proposed connection point.

During discussions with the DER Connections Review Working Group (Working Group), members recognized that additional information regarding the potential complexity of connecting the proposed DER would provide significant value to customers. This information would offer customers an early indication of project risks and the complexity of connection requirements, thereby aiding them in determining whether to proceed with their projects.

Recognizing the importance of providing customers with comprehensive connection information, OEB staff, in collaboration with the Working Group developed new PCIR and PCR template forms. The OEB anticipates that the new forms will improve the exchange of information between distributors and customers and enhance the overall value of the preliminary consultation process.

II. Revisions to the PCIR and PCR template forms

The intention of these revisions is to improve efficiency and effectiveness of the preliminary consultation process and provide applicants with an early indication of project risks and complexity. A high-level summary of the revisions is listed below, and detailed changes can be found in Attachment A (List of changes in the PCIR and PCR templates) and Attachment B (Version 2 of the PCIR and PCR templates). Examples of how to complete the revised PCIR and PCR forms are provided in Attachment C.

- To enhance the efficiency of information exchanges, the PCIR and PCR forms will be consolidated into a single document in MS Excel file format. This integration will streamline the process and facilitate seamless communication between applicants and distributors.
- The PCR template will be enhanced to incorporate a preliminary assessment of connection complexity. This assessment will offer an initial evaluation of the anticipated connection requirements and their level of complexity. For example, the revised template will provide information regarding station constraints, potential upgrades/modifications to the distribution system infrastructure, and potential protection and monitoring requirements.

The OEB acknowledges distributors may need to make certain changes to websites and processes to implement the new templates, therefore the updates to the DERCP Appendix C will come into effect on September 18, 2023.

Questions regarding this letter should be addressed to Industry Relations at IndustryRelations@oeb.ca.

DATED at Toronto, **June 16, 2023**

ONTARIO ENERGY BOARD

Brian Hewson
Vice President, Consumer Protection, and Industry Performance

Attachments:

Attachment A: List of changes in the PCIR and PCR template forms

Attachment B: DERCP–Appendix C PCIR and PCR–Version 2

Attachment C: DER PCIR and PCR-Version 2–Sample 1-100 kW

Attachment D: DER PCIR and PCR-Version 2–Sample 2-2500kW

Attachment A: List of changes to PCIR and PCR template forms

Below is a high-level list of the changes made to these forms:

1. Format

There is no requirement regarding the template format. Distributors may select a format that suits their operation such as PDF, Excel, or Web-based interface. The posted version 2, under the DERCP Appendix C, is in Excel format with two main tabs - PCIR and PCR - to allow distributors to use linkages between the two forms when auto-populating the applicant and distributor information. This format also allows distributors to further develop the templates by incorporating technical assessments and macros directly to generate the PCR quickly.

2. Structure

The figure below shows the updated list of sections in the PCIR and PCR. Various sections have been revised from version 1. Version 2 introduces multiple new sections including an important section in the PCR labeled “5. Preliminary Assessment of Connection Complexity.”

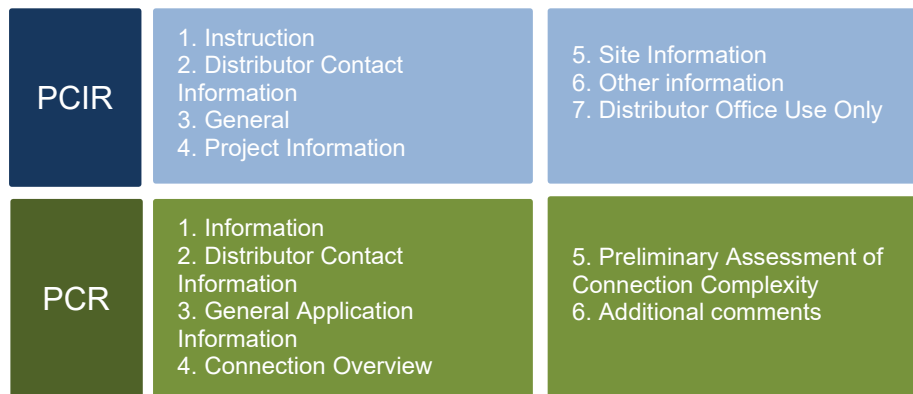


Figure 1: PCIR and PCR Structure

3. Preliminary assessment of connection complexity

Version 1 of the PCR only provides the applicant with information on whether the capacity is available and potential required connection impact assessment(s) (Distributor CIA, Host Distributor CIA, Transmitter CIA, and/or IESO System Impact Assessment (SIA)). Version 2 of the PCR provides this information and adds preliminary assessment information on the following items:

- Station constraints
 - o Thermal constraints at the upstream station
 - o Short circuit constraints at the upstream station
- Distribution system infrastructure
 - o New line expansion
 - o Reconductoring of existing feeder trunk
 - o Site distribution transformer upgrades
 - o Reconductoring of branch/tap
- Protection, monitoring, metering, and telecom
 - o Station protection upgrades
 - o Remote monitoring
 - o Metering upgrades
 - o Transfer Trip
- Distributor-specific criteria
- Distributor overall assessment of connection feasibility
 - o Anticipated connection complexity
 - There are four potential complexity tiers:
 - Extremely High: Projects that are of “extremely high” complexity are likely not viable, due to the nature of system constraints that preclude the connection of the contemplated DER facility.
 - High: Projects that are characterized as having “high” complexity can be made viable through a combination of transmission, distribution, or customer-side infrastructure upgrades.
 - Medium: Projects having “medium” complexity can be made viable through a combination of distribution system upgrades. Transmission system upgrades are most likely not required. Customer-side infrastructure upgrades may be required.
 - Low: Projects that are characterized as having “low” complexity are viable with minor distribution system modifications. Transmission system upgrades are most likely not required. Customer-side infrastructure upgrades may be required.

4. Other key changes

Although the goal of version 2 is to provide additional information on the potential complexity of the DER connection, Working Group members also considered the changed landscape of DER connections in Ontario in the development of version 2. Examples of these considerations are:

- a) The need for transparency and information sharing: To enable better communication, version 2 templates request distributors to provide contact

information for the department that oversees the DER connection assessments. They also have comment boxes to enable information sharing between parties.

- b) The increase in hybrid arrangements of DER connections: version 2 has a more user-friendly project information section, allowing the applicant to provide information for each DER type.
- c) The increase in number of project sites with existing DER(s): version 2 creates an independent site information section and expands it, allowing the applicant to provide information on existing DER(s) at the same project site.