



STANDARDS FOR INTERCONNECTION OF COMMUNITY SOLAR PROGRAM PROJECTS

1. Scope and Applicability

Pursuant to ORS 757.386, the Community Solar Program (CSP) Rules, the Program Implementation Manual, Commission Order No. 19-392, this document (“CSP Interconnection Standards” or “Standards”) describes the process and requirements for CSP interconnection service as set forth in the Schedule.

(1) These Standards govern the interconnection of a CSP Project with a nameplate capacity of 3 megawatts AC or less to PGE’s transmission or distribution system. The Standards do not apply if the interconnection between the CSP Project and PGE is subject to the jurisdiction of the Federal Energy Regulatory Commission (FERC).

(2) These Standards do not apply to the interconnection of a net metering facility, which is governed by OAR chapter 860, division 039 or a small generator facility, which is governed by OAR chapter 860, division 082.

(3) In the event there is a conflict between the terms of the Schedule and these Standards, the terms of the Schedule shall apply and prevail.

2. Waiver

(1) Upon request or its own motion, the Commission may waive any portion of these Standards for good cause shown. A request for waiver must be made in writing, unless otherwise allowed by the Commission.

(2) PGE and an applicant or interconnection customer may agree to reasonable extensions to the required timelines in the Schedule or these Standards without requesting a waiver from the Commission.

(a) If PGE and an applicant or CSP Interconnection Service customer are unable to agree to waive a timeline, then PGE, applicant, or CSP Interconnection Service customer may request that the Commission grant a waiver.

(b) In deciding whether to grant a waiver of a timeline, the Commission will consider the number of pending applications for interconnection review and the type of applications, including review level, facility type, and facility size.



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(c) Waiver of a timeline, whether by agreement or Commission order, does not affect an application's queue position.

3. Definitions

(1) "Adverse system impact" means a negative effect caused by the interconnection of a CSP Project that may compromise the safety or reliability of a transmission or distribution system.

(2) "Affected system" means a transmission or distribution system, not owned or operated by the interconnecting public utility, which may experience an adverse system impact from the interconnection of a CSP Project.

(3) "Aggregated nameplate capacity" means the total combined nameplate capacity of:

(a) A proposed CSP Project;

(b) Existing CSP Projects, small generator facilities, net metering facilities, FERC jurisdictional generators, and state jurisdictional generators with a nameplate capacity greater than 10 megawatts; and

(c) CSP Projects, small generator facilities, net metering facilities, FERC jurisdictional generators, and state jurisdictional generators with a nameplate capacity greater than 10 megawatts that have pending completed applications with higher queue positions than the proposed CSP Project.

(4) "Applicant" means a person or business who has submitted an application to interconnect a CSP Project to a public utility's transmission or distribution system.

(5) "Application" means a written request to interconnect a CSP Project with a public utility's transmission or distribution system.

(6) "Area network" means a type of distribution system served by multiple transformers interconnected in an electrical network circuit in order to provide high reliability of



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service. This term has the same meaning as the term “secondary grid network” as defined in IEEE 1547, section 4.1.4.

(7) “Certificate of completion” means a certificate signed by an applicant and an interconnecting public utility attesting that a CSP Project is complete, meets the applicable requirements of the Schedule, and has been inspected, tested, and certified as physically ready for operation. A certificate of completion includes the “as built” specifications and initial settings for the CSP Project and its associated interconnection equipment.

(8) “CSP Project” has the meaning as set forth in the Schedule. A CSP Project does not include interconnection equipment, interconnection facilities, or system upgrades.

(9) “CSP queue” means the separate queue from the standard small generator queue set forth in 4.1.c below, which a CSP Project may qualify for if it meets certain criteria.

(10) “Distribution system” means the portion of an electric system that delivers electricity from transformation points on the transmission system to points of connection on a customer’s premises.

(11) “Fault current” means an electrical current that flows through a circuit during a fault condition. A fault condition occurs when one or more electrical conductors contact ground or each other. Types of faults include phase to ground, double-phase to ground, three-phase to ground, phase to phase, and three-phase.

(12) “Field-tested equipment” means interconnection equipment that is identical to equipment that was approved by the interconnecting public utility for a different CSP Project or small generator facility interconnection under Tier 4 review and successfully completed a witness test within three years before the date of the submission of the current application.

(13) “IEEE 1547” means the standards published by the Institute of Electrical and Electronics Engineers (IEEE) Standard 1547, titled “Interconnecting Distributed Resources with Electric Power Systems” and approved by the IEEE SA Standards Board.



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(14) "IEEE 1547.1" means the standards published by the IEEE Standard 1547.1, titled "Conformance Test Procedures for Equipment Interconnecting Distributed Resources with Electric Power Systems" and approved by the IEEE SA Standards Board.

(15) "Interconnection agreement" means a contract between an applicant or interconnection customer and an interconnecting public utility that governs the interconnection of a CSP Project to the public utility's transmission or distribution system and the ongoing operation of the CSP Project after it is interconnected.

(16) "Interconnection customer" means a person with one or more CSP Projects interconnected to a public utility's transmission or distribution system.

(17) "Interconnection equipment" means a group of components or an integrated system provided by an interconnection customer or applicant to connect a CSP Project to a public utility's transmission or distribution system.

(18) "Interconnection facilities" means the facilities and equipment required by a public utility to accommodate the interconnection of a CSP Project to the public utility's transmission or distribution system and used exclusively for that interconnection. Interconnection facilities do not include system upgrades.

(19) "CSP interconnection service" means the interconnection service provided by an interconnecting public utility to an interconnection customer hereunder.

(20) "Lab-tested equipment" means interconnection equipment that has been designed to comply with IEEE 1547, tested in accordance with IEEE 1547.1, and certified and labeled as compliant with these IEEE standards at the point of manufacture by a nationally recognized testing lab. For interconnection equipment to be considered lab-tested equipment under these rules, the equipment must be used in a manner consistent with the certification.

(21) "Line section" means that portion of a public utility's transmission or distribution system that is connected to an interconnection customer and bounded by automatic sectionalizing devices or the end of a distribution line.



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(22) "Losses" are the loss of electric energy occurring as a result of the transformation and transmission of electric energy from the CSP Project to the Point of Interconnection.

(23) "Low-side Metering" means loss-compensated revenue metering located on the low voltage side of the CSP Project's step-up transformer.

(24) "Minor equipment modification" means a change to a CSP Project or its associated interconnection equipment that:

(a) Does not affect the application of the approval requirements in Tiers 2;

(b) Does not, in PGE's reasonable opinion, have a material impact on the safety or reliability of PGE's transmission or distribution system or an affected system; and

(c) Does not affect the nameplate capacity of a CSP Project.

(25) "Nameplate capacity" means the full-load electrical quantities assigned by a CSP Project's designer to the generator and its prime mover or other piece of electrical equipment, such as transformers and circuit breakers, under standardized conditions, as expressed in amperes, kilovoltamperes, kilowatts, volts, megawatts, or other appropriate units. Nameplate capacity is usually indicated on a nameplate attached to the individual device.

(26) "Nationally recognized testing laboratory" or "NRTL" means a qualified private organization that performs independent safety testing and product certification. Each NRTL must meet the requirements set forth by the United States Occupational Safety and Health Administration.

(27) "Net metering facility" has the meaning set forth in ORS 757.300(1)(d).

(28) "Pending completed application" means an application for interconnection of a CSP Project, a small generator facility, a net metering facility, or a FERC jurisdictional generator that PGE has deemed complete.

(29) "Person" has the meaning set forth in OAR 860-011-0035(8).



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(30) "Point of interconnection" means the point on the high side of the CSP Project's step-up transformer(s) where a CSP Project is electrically connected to PGE's transmission or distribution system. This term has the same meaning as "point of common coupling" as defined in IEEE 1547, section 3.1.13. This term does not have the same meaning as "point of common coupling" as defined in OAR 860-039-0005(3)(p).

(31) "Pre-certified Project" is a CSP Project that is pre-certified by the Oregon Public Utility Commission under the Community Solar Program and in accordance with OAR 860-088-0040 and the Program Implementation Manual.

(32) "Primary line" means a distribution line with an operating voltage greater than 600 volts.

(33) "Public utility" has the meaning set forth in ORS 757.005 and is limited to a public utility that provides electric service.

(34) "Queue position" means the rank of a pending completed application, relative to all other pending completed applications, that is established based on the date and time that PGE receives the completed applications, including application fees. The CSP queue and standard small generator queue will have separate queue positions.

(35) "Schedule" means PGE's Community Solar Program Interconnection and Power Purchase Schedule, including these Standards, and including all exhibits attached thereto or incorporated by reference.

(36) "Scoping meeting" means an initial meeting between representatives of an applicant and PGE that is conducted to discuss alternative interconnection options; to exchange information, including any relevant transmission or distribution system data and earlier studies that would reasonably be expected to affect the interconnection options; to analyze such information; and to determine the potentially feasible points of interconnection.

(37) "Secondary line" means a service line with an operating voltage of 600 volts or less.



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(38) "Spot network" means a type of transmission or distribution system that uses two or more intertied transformers protected by network protectors to supply an electrical network circuit. A spot network may be used to supply power to a single customer or a small group of customers.

(39) "System upgrade" means an addition or modification to a public utility's transmission or distribution system or to an affected system that is required to accommodate the interconnection of a CSP Project.

(40) "Transmission line" means any electric line operating at or above 50,000 volts.

(41) "Transmission system" means a public utility's high voltage facilities and equipment used to transport bulk power or to provide transmission service under the public utility's open access transmission tariff.

(42) "Witness test" means the on-site visual verification of the interconnection installation and commissioning as required in IEEE 1547, sections 5.3 and 5.4. For interconnection equipment that does not meet the definition of lab-tested equipment, the witness test may, at the discretion of the public utility, also include a system design and production evaluation according to IEEE 1547, sections 5.1 and 5.2, as applicable to the specific interconnection equipment used.

(43) "Written notice" means a notice required by these Standards sent via First Class United States mail. The duty to provide written notice is deemed fulfilled on the day that the notice is deposited in the mail. A public utility and an applicant or interconnection customer may agree in writing to accept written notice via electronic mail. If using electronic mail by agreement, then the duty to provide written notice is deemed fulfilled on the day the notice is sent. A public utility and an applicant or interconnection customer are responsible for informing one another of changes to the physical or electronic address used to receive notifications.

3. Pre-Application Process



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(1) PGE must designate an employee or office from which relevant information about the community solar interconnection process, PGE's transmission or distribution system, and affected systems may be obtained through informal requests for a potential applicant proposing a CSP at a specific site. PGE must post contact information for the employee or office on PGE's website.

(a) The information provided by PGE in response to a potential applicant's request may include relevant existing studies and other materials that may be used to understand the feasibility of interconnecting a CSP Project at a particular point on the public utility's transmission or distribution system. CSP Projects that have been certified by the Third-Party Program Administrator (PA) as non-profit or governmental-based projects may make up to five pre-application information requests at no cost. Program Managers must provide written evidence from the PA of their non-profit or governmental based status prior to making such information requests. PGE will comply with reasonable requests for access to or copies of such information, except to the extent that providing such materials would violate security requirements, confidentiality obligations to third parties, or be contrary to federal or state regulations. PGE may require a person to sign a confidentiality agreement if required to protect confidential or proprietary information. For potential CSP Projects requiring Tier 4 interconnection review, and at the potential applicant's request, PGE will meet with the potential applicant to exchange information. A PGE employee with relevant technical expertise will attend any such meeting.

(2) Each pre-application information request requires payment of a \$300 fee.

4. Applications to Interconnect a CSP Project

(1) A person may not interconnect a CSP Project to PGE's transmission or distribution system without authorization from PGE.

(a) A person proposing to interconnect a new CSP Project to PGE's transmission or distribution system must submit an application to PGE.



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(b) A person proposing more than one community solar facility to be interconnected to the same distribution feeder may request that PGE jointly study the requests if the interconnection applications are submitted in back to back queue order.

(c) An applicant with a pending completed application to interconnect a CSP Project must submit a new application if the applicant proposes to make any change to the CSP Project other than a minor equipment modification. This includes changes affecting the nameplate capacity of the proposed CSP Project.

(d) In order to qualify for the CSP queue an applicant with a pending completed application to interconnect a CSP Project together with all other interconnected generators and higher queued generators requesting interconnection on the same feeder and substation transformer must be less than 100 percent of the daytime minimum load (DML). If a measure of DML is not available for the feeder and substation transformer associated with the point of interconnection, PGE will use 30 percent of the summer peak load on the feeder and or substation transformer. The following also apply:

(A) The applicant relinquishes the standard small generator queue position assigned to the pending completed application, and PGE assigns a new CSP queue position based on the date and time PGE receives the new application.

(B) If the new interconnection application is submitted within 30 business days of the date of submission of the original application, then PGE must apply the original application fee to the application fee required for the new CSP queue application.

(e) A person with a pending completed application to interconnect a net metering facility or a FERC jurisdictional generator who proposes to change the facility to a CSP Project must submit a new application under the Schedule and these Standards, and the following apply:

(A) The applicant relinquishes the queue position assigned to the pending completed application, and PGE assigns a new queue position based on the date and time that PGE receives the community solar interconnection application.

(B) If the interconnection application is received within 30 business days of the date of submission of the original net metering or FERC jurisdictional generator



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interconnection application, then PGE must apply the original application fee to the application fee required for the new application.

(e) An interconnection customer must submit an application before the expiration of the interconnection agreement between the interconnection customer and the interconnected public utility. The application must be submitted no later than 60 business days before the interconnection agreement's expiration date.

(A) PGE may not unreasonably refuse to grant expedited review of an application to renew an existing CSP interconnection if there have been no changes to the CSP other than minor equipment modifications.

(B) PGE may not require an existing CSP to undergo Tier 4 review if there have been no changes to the CSP other than minor equipment modifications and there have been no material changes to the portion of PGE's transmission or distribution system affected by the interconnection of the CSP.

(C) PGE may require the interconnection customer to pay for interconnection facilities, system upgrades, or changes to the CSP or its associated interconnection equipment that are necessary to bring the CSP interconnection into compliance with the community solar interconnection tariff or IEEE 1547 or 1547.1.

(D) If PGE has not completed its review of an application to renew and a new interconnection agreement is not signed before the expiration of the current interconnection agreement governing the interconnection of an existing CSP to PGE's transmission or distribution system, then the current interconnection agreement remains in effect until the renewal process is completed and a new interconnection agreement is signed.

(2) All applications must be made using the appropriate application form and must follow the standard form applications developed by PGE and approved by the Commission. PGE will provide separate application forms for review under Tier 2 and Tier 4. PGE will provide a copy of an application form to any person upon request and must post copies of the application forms on PGE's website.



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(b) Applicants must use the form for review under Tiers 2, or 4 for interconnection of all CSP Projects.

(3) PGE may require payment of a nonrefundable application processing fee. The amount of the fee depends upon the review tier requested in the application and is intended to cover the reasonable costs of processing and evaluating the application.

(a) The application fee may not exceed \$500 for Tier 2 review, and \$1000 for review under Tier 4.

(b) An applicant must pay the reasonable costs incurred by PGE to perform any studies and engineering evaluations permitted by the Schedule and these Standards, and necessary to evaluate the proposed application to interconnect. Before PGE may assess any costs in excess of the application fee, PGE must receive written authorization from the applicant. If the applicant does not authorize the additional costs, then the application is deemed withdrawn and the original application fee is forfeited.

(c) If an application is denied at Tier 2, and the applicant resubmits the application at a Tier 4 within 15 business days after the date the applicant received notification of the denial, then the applicant maintains the queue position assigned to the original application and PGE must apply the original application fee and any other fees paid in conjunction with the original application to the fees applicable to the resubmitted application.

(4) If an applicant proposes to interconnect multiple CSP Projects to PGE's transmission or distribution system at a single point of interconnection, then PGE must evaluate the applications based on the combined total nameplate capacity for all of the CSP Projects. If the combined total nameplate capacity exceeds 3 megawatts, then the Schedule and these Standards do not apply.

(5) An applicant must provide documentation of site control with an interconnection application. Site control may be demonstrated through ownership of the site, a leasehold interest in the site, or an option or other right to develop the site for the



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purpose of constructing the CSP Project. Site control may be documented by a property tax bill, deed, lease agreement, or other legally binding contract.

(6) PGE may propose to interconnect multiple CSP Projects at a single point of interconnection to minimize costs, and an affected applicant or interconnection customer may not unreasonably refuse such a proposal. An applicant or interconnection customer may, however, elect to maintain a separate point of interconnection if the applicant or interconnection customer agrees to pay the entire cost of the separate interconnection facilities.

(7) Application review process.

(a) Within 10 business days of receipt of an application to interconnect a CSP Project, PGE must provide written notice to the applicant stating whether the application is complete.

(A) If the application is incomplete, then PGE must provide the applicant with a detailed list of the information needed to complete the application. An application is deemed complete when PGE receives the listed information. The applicant must provide the listed information within 10 business days of receipt of the list or the application is deemed withdrawn.

(B) If PGE does not have a record of receipt of an application or cannot locate an application, then the applicant must provide an additional copy of the application to PGE. If the applicant can demonstrate that a complete application was originally delivered to PGE at a particular time on a particular date, then PGE must assign a queue position to the application based on the original time and date of delivery.

(b) Once PGE deems an application to be complete, PGE must assign the application a queue position. If the application meets the eligibility requirements for the CSP queue, it will be assigned to the CSP queue, otherwise, it will be assigned to the standard small generator queue. An applicant must meet all applicable deadlines in the Schedule and these Standards to maintain its queue position unless the deadlines have been waived by agreement with PGE or by Commission order.



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(c) If PGE determines during the evaluation process that supplemental or clarifying information is required, then PGE must request the information from the applicant. The time necessary to complete the evaluation of the application may be extended by the time required for the receipt of the additional information. Requests for information do not affect the applicant's queue position.

(d) PGE must use IEEE 1547 and IEEE 1547.1 to evaluate interconnection applications unless otherwise specified in these Standards or unless the Commission grants a waiver to use different or additional standards.

(e) PGE must provide an executable interconnection agreement no later than five business days after the date of approval of an interconnection application. The interconnection agreement must follow the standard form agreement developed by PGE and approved by the Commission. The applicant must return an executed interconnection agreement to PGE within 15 business days of receipt or the application is deemed withdrawn.

(A) An applicant and PGE is entitled to the terms in the standard form agreement, but may choose to mutually negotiate and agree to different terms.

(B) If negotiated changes to a standard interconnection agreement are materially inconsistent with the Schedule and these Standards, then the applicant and PGE must seek Commission approval of the negotiated interconnection agreement.

(f) The applicant must provide PGE written notice at least 20 business days before the planned commissioning for the CSP Project.

(A) PGE has the option of conducting a witness test at a mutually agreeable time within 10 business days of the scheduled commissioning.

(B) PGE must provide written notice to the applicant indicating whether the public utility plans to conduct a witness test or will waive the witness test.

(C) If PGE notifies the applicant that it plans to conduct a witness test, but fails to conduct the witness test within 10 business days of the scheduled commissioning date



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or within a time otherwise agreed upon by the applicant and PGE, then the witness test is deemed waived.

(D) If the witness test is conducted and is not acceptable to PGE, then PGE must provide written notice to the applicant describing the deficiencies within five business days of conducting the witness test. PGE must give the applicant 20 business days from the date of the applicant's receipt of the notice to resolve the deficiencies. If the applicant fails to resolve the deficiencies to the reasonable satisfaction of PGE within 20 business days, then the application is deemed withdrawn.

(g) PGE must meet all applicable deadlines in the Schedule and these Standards unless the deadlines have been waived by agreement with an applicant or interconnection customer or by Commission order. If PGE cannot meet an applicable deadline, then PGE must provide written notice to the applicant or interconnection customer explaining the reasons for the failure to meet the deadline and an estimated alternative deadline. PGE's failure to meet an applicable deadline does not affect an applicant's queue position.

5. Construction, Operation, Maintenance, and Testing of CSP Projects

(1) An interconnection customer or applicant must construct, operate, and maintain a CSP Project and its associated interconnection equipment in compliance with IEEE 1547 and 1547.1.

(2) The applicant must provide written notice to PGE 10 business days before beginning operation of an approved CSP Project.

(3) Before beginning operation of a CSP Project, an interconnection customer or applicant must receive approval of the facility under the Schedule and these Standards, must have received certification under the Community Solar Program and must execute an interconnection agreement with PGE. Applicants or interconnection customers are entitled to a maximum 20-year term for an interconnection agreement.



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(4) A CSP Project must be capable of being isolated from PGE's transmission or distribution system. An interconnection customer may not disable an isolation device without the prior written consent PGE.

(a) For CSP Projects interconnecting to a primary line, the interconnection customer or applicant must use a lockable, visible-break isolation device readily accessible to PGE.

(b) For CSP Projects interconnecting to a secondary line, the interconnection customer or applicant must use a lockable, visible-break isolation device that is readily accessible to PGE.

(A) The interconnection customer or applicant may elect to provide PGE access to an isolation device that is contained in a building or area that may be unoccupied and locked or not otherwise readily accessible to PGE. The interconnection customer or applicant must provide a lockbox capable of accepting a lock provided by PGE that provides ready access to the isolation device. The interconnection customer or customer must install the lockbox in a location that is readily accessible by PGE and must affix a placard in a location acceptable to PGE that provides clear instructions to utility personnel on how to access the isolation device.

(c) All isolation devices must be installed, owned, and maintained by the interconnection customer or applicant; must be capable of interrupting the full load of the CSP Project; and must be located between the CSP Project and the point of interconnection.

(5) PGE must have access to an interconnection customer's or an applicant's premises for any reasonable purpose related to an interconnection application or an interconnected CSP Project. PGE must request access at reasonable hours and upon reasonable notice. In the event of an emergency or hazardous condition, PGE may access the interconnection customer's or applicant's premises at any time without prior notice, but PGE must provide written notice within five business days after entering the interconnection customer's or applicant's premises that describes the date of entry, the purpose of entry, and any actions performed on the premises.



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(6) When a CSP Project undergoes maintenance or testing in compliance with these Standards, IEEE 1547, or IEEE 1547.1, the interconnection customer must retain written records for at least seven years documenting the maintenance and the results of testing. The interconnection customer must provide copies of these records to PGE upon request.

6. Cost Responsibility

(1) Study costs. Whenever a study is required under these Standards, the applicant must pay PGE for the reasonable costs incurred in performing the study. PGE must base study costs on the scope of work determined and documented in the system impact study agreement, or the facilities study agreement, as applicable. The estimated engineering costs used in calculating study costs must not exceed \$100 per hour. PGE may adjust the \$100 hourly rate once in January of each year to account for inflation and deflation as measured by the Consumer Price Index. Before beginning a study, PGE may require an applicant to pay a deposit of up to 50 percent of the estimated costs to perform the study or \$1000, whichever is less.

(a) CSP Projects requesting to be studied jointly will have the study costs allocated equally amongst the participants.

(2) Interconnection facilities. For interconnection review under Tier 4, PGE must identify the interconnection facilities necessary to safely interconnect the CSP Project with PGE's transmission or distribution system. The applicant must pay the reasonable costs of the interconnection facilities. PGE constructs, owns, operates, and maintains the interconnection facilities.

(a) If joint studying of CSP Projects are undertaken, each CSP Project will have Interconnection Facilities directly assigned.

(3) Interconnection equipment. An applicant or interconnection customer must pay all expenses associated with constructing, owning, operating, maintaining, repairing, and replacing its interconnection equipment. Interconnection equipment is constructed, owned, operated, and maintained by the applicant or interconnection customer.



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(4) System upgrades. PGE must design, procure, construct, install, and own any system upgrades to PGE's transmission or distribution system necessitated by the interconnection of a CSP Project. PGE must identify any adverse system impacts on an affected system caused by the interconnection of a CSP Project to PGE's transmission or distribution system. PGE must determine what actions or upgrades are required to mitigate these impacts. Such mitigation measures are considered system upgrades as defined in these rules. The applicant must pay the reasonable costs of any system upgrades.

(a) If joint studying of CSP Projects are undertaken, the CSP Projects will be allocated the costs for System Upgrades based the proportional capacity of each project. The final cost sharing will be detailed in the Attachments to the Community Solar Project interconnection agreement.

(b) If a CSP Project that has been jointly studied and allocated a share of system upgrade costs withdraws, PGE will reassess the System Upgrades needed to complete the interconnection(s) and reallocate the System Upgrade costs to the remaining Community Solar Project(s) using the same methodology in Section 6(4)(a).

(5) PGE may not begin work on interconnection facilities or system upgrades before an applicant receives PGE's good-faith, non-binding cost estimate and provides written notice to PGE that the applicant accepts the estimate and agrees to pay the costs. PGE may require an applicant to pay a deposit before beginning work on the interconnection facilities or system upgrades.

(a) If an applicant agrees to make progress payments on a schedule established by the applicant and PGE, then PGE may require the applicant to pay a deposit of up to 25 percent of the estimated costs or \$10,000, whichever is less. PGE and the applicant must agree on progress billing, final billing, and payment schedules before PGE begins work.

(b) If an applicant does not agree to make progress payments, then PGE may require the applicant to pay a deposit of up to 100 percent of the estimated costs. If the actual costs are lower than the estimated costs, then PGE must refund the unused portion of



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the deposit to the applicant within 20 business days after the actual costs are determined.

7. Insurance

(1) PGE may require an applicant or an interconnection customer with a CSP Project to obtain prudent amounts of general liability insurance in order to interconnect to PGE's transmission or distribution system.

8. Tier 2 Interconnection Review

(1) PGE must use the Tier 2 interconnection review procedures for an application to interconnect a CSP Project that meets the following requirements:

(a) The CSP Project must have a nameplate capacity of two megawatts or less;

(b) The CSP Project must be interconnected to either a radial distribution circuit or a spot network distribution circuit limited to serving one customer;

(c) The CSP Project must not be interconnected to a transmission line; and

(d) The CSP Project must use interconnection equipment that is either lab-tested equipment or field-tested equipment. For equipment to gain status as field-tested equipment, the applicant must provide all the documentation from the prior Tier 4 study, review, and approval, including any interconnection studies and the certificate of completion.

(2) Tier 2 Approval Criteria. PGE must approve an application to interconnect a CSP Project under the Tier 2 interconnection review procedures if the facility meets the approval criteria in subsections (a) through (l). A public utility may not impose different or additional approval criteria.

(a) For interconnection of a CSP Project to a radial distribution circuit, the aggregated nameplate capacity on the circuit must not exceed 15 percent of the line section annual peak load as most recently measured at the substation or calculated for the line section.



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(b) For interconnection of a CSP Project to the load side of spot network protectors, the aggregated nameplate capacity on the load side of the spot network protectors must not exceed the lesser of five percent of a spot network's maximum load or 50 kilowatts.

(c) The aggregated nameplate capacity must not contribute more than 10 percent to the distribution circuit's maximum fault current at the point on the primary voltage distribution line nearest the point of interconnection.

(d) The aggregated nameplate capacity on the distribution circuit must not cause any distribution protective devices and equipment (including substation breakers, fuse cutouts, and line reclosers) or other PGE equipment on the transmission or distribution system to be exposed to fault currents exceeding 90 percent of the short circuit interrupting capability. The CSP Project's point of interconnection must not be located on a circuit that already exceeds 90 percent of the short circuit interrupting capability.

(e) The aggregated nameplate capacity on the distribution side of a substation transformer feeding the circuit where the CSP Project proposes to interconnect must not exceed 10 megawatts in an area where there are known or posted transient stability limitations to generating units located in the general electrical vicinity (for example, three or four distribution busses from the point of interconnection).

(f) If the CSP Project interconnection is to a primary line on the distribution system, then the interconnection must meet the following criteria:

(A) If the CSP Project is three-phase or single-phase and will be connected to a three-phase, three-wire primary line, then the CSP Project must be connected phase-to-phase.

(B) If the CSP Project is three-phase or single-phase and will be connected to a three-phase, four-wire primary line, then the CSP Project must be connected line-to-neutral and effectively grounded.

(g) For interconnection of a CSP Project to a single-phase shared service line on the transmission or distribution system, the aggregated nameplate capacity on the shared secondary line must not exceed 20 kilowatts.



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(h) For interconnection of a single-phase CSP Project to the center tap neutral of a 240-volt service line, the addition of the CSP Project must not create a current imbalance between the two sides of the 240-volt service line of more than 20 percent of the nameplate rating of the service transformer.

(i) Except as provided in subsection (2)(l), the interconnection of the CSP Project must not require system upgrades or interconnection facilities different from or in addition to the applicant's proposed interconnection equipment.

(j) The aggregated nameplate capacity, in combination with existing transmission loads, must not cause the transmission system circuit directly connected to the distribution circuit where the CSP Project interconnection is proposed to exceed its design capacity.

(k) If the CSP Project fails to meet one or more of the criteria in subsections (2)(a) through (k), but PGE determines that the CSP Project could be interconnected safely if minor modifications to the transmission or distribution system were made (for example, changing meters, fuses, or relay settings), then PGE must offer the applicant a good-faith, non-binding estimate of the costs of such proposed minor modifications. Modifications are not considered minor under this subsection if the total cost of the modifications exceeds \$10,000. If the applicant authorizes PGE to proceed with the minor modifications and agrees to pay the entire cost of the modifications, then PGE must approve the application under Tier 2.

(3) In addition to the timelines and requirements in OAR 860-082-0025, the following timelines and requirements apply to Tier 2 interconnection reviews:

(a) PGE must schedule a scoping meeting within 10 business days after notifying an applicant that its application is complete. PGE and the applicant may agree to waive the scoping meeting requirement.

(b) Within 20 business days after PGE notifies an applicant that its application is complete or a scoping meeting is held, whichever is later, PGE must:

(A) Evaluate the application using the Tier 2 approval criteria in section (2);



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(B) Review any independent analysis of the proposed interconnection provided by the applicant that was performed using the Tier 2 approval criteria; and

(C) Provide written notice to the applicant stating whether PGE approved the application. If applicable, PGE must include a comparison of its evaluation to the applicant's independent analysis.

(4) The interconnection process is not complete until:

(a) PGE approves the application;

(b) Any minor modifications to the transmission or distribution system required under subsection (2)(l) are complete;

(c) The witness test, if conducted by PGE, is successful; and

(d) The applicant and PGE execute a certificate of completion. The certificate of completion must follow the standard form certificate developed by PGE.

(5) If a CSP Project is not approved under the Tier 2 interconnection review procedure, then the applicant may submit a new application under the Tier 4 review procedures. At the applicant's request, PGE must provide a written explanation of the reasons for denial within five business days of the request.

9. Tier 4 Interconnection Review

(1) PGE must use the Tier 4 interconnection review procedures for an application to interconnect a CSP Project that meets the following requirements:

(a) The CSP Project does not qualify for or failed to meet the Tier 2 interconnection review requirements; and

(b) The CSP Project must have a nameplate capacity of 3 megawatts or less.

(2) PGE must approve an application to interconnect a CSP Project under the Tier 4 interconnection review procedures if PGE determines that the safety and reliability of



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PGE's transmission or distribution system will not be compromised by interconnecting the CSP Project. The applicant must pay the reasonable costs of any interconnection facilities or system upgrades necessitated by the interconnection.

(3) In addition to the timelines and requirements in OAR 860-082-0025, the timelines and requirements in sections (5) through (12) of this rule apply to Tier 4 interconnection reviews.

(4) PGE and an applicant may agree to waive the requirement for a scoping meeting.

(5) PGE must schedule a scoping meeting within 10 business days after notifying an applicant that its application is complete.

(a) PGE and the applicant must bring to the scoping meeting all personnel, including system engineers, as may be reasonably required to accomplish the purpose of the meeting.

(b) PGE and applicant must discuss whether PGE should perform a system impact study, a facilities study, or an interconnection agreement.

(c) If PGE determines that no studies are necessary, then PGE must approve the application within 15 business days of the scoping meeting if:

(A) The application meets the criteria in section (2); and

(B) The interconnection of the CSP Project does not require system upgrades or interconnection facilities different from or in addition to the applicant's proposed interconnection equipment.

(d) If PGE determines that no studies are necessary and that the CSP Project could be interconnected safely if minor modifications to the transmission or distribution system were made (for example, changing meters, fuses, or relay settings), then PGE must offer the applicant a good-faith, non-binding estimate of the costs of such proposed minor modifications. Modifications are not considered minor under this subsection if the total cost of the modifications exceeds \$10,000. If the applicant authorizes PGE to proceed with the minor modifications and agrees to pay the entire cost of the



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modifications, then PGE must approve the application within 15 business days of receipt of the applicant's agreement to pay for the minor modifications.

(6) If PGE reasonably concludes that an adequate evaluation of an application requires a system impact study, then PGE must provide the applicant with an executable system impact study agreement within five business days of the date of the scoping meeting.

(a) The system impact study agreement must include a detailed scope for the system impact study, a reasonable schedule for completion of the study, and a good-faith, non-binding estimate of the costs to perform the study.

(b) The system impact study agreement must follow the standard form agreement developed by PGE and approved by the Commission.

(c) The applicant must execute the system impact study agreement within 15 business days of receipt of the agreement or the application is deemed withdrawn.

(d) PGE must make reasonable, good-faith efforts to follow the schedule set forth in the system impact study agreement for completion of the study.

(e) The system impact study must identify and detail the impacts on PGE's transmission or distribution system or on an affected system that would result from the interconnection of the CSP Project if no modifications to the CSP Project or system upgrades were made. The system impact study must include evaluation of the adverse system impacts identified in the scoping meeting.

(f) In determining possible adverse system impacts, PGE must consider the aggregated nameplate capacity of all generating facilities that, on the date the system impact study begins, are directly interconnected to PGE's transmission or distribution system, have a pending completed application to interconnect with a higher queue position, or have an executed interconnection agreement with PGE.

(g) The system impact study must include:

(A) A short circuit analysis;



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- (B) A stability analysis;
 - (C) A power flow analysis;
 - (D) Voltage drop and flicker studies;
 - (E) Protection and set point coordination studies;
 - (F) Grounding reviews;
 - (G) The underlying assumptions of the study;
 - (H) The results of the analyses; and
 - (I) Any potential impediments to providing the requested CSP interconnection service.
- (h) If an applicant provides an independent system impact study to PGE, then PGE must evaluate and address any alternative findings from that study.
- (i) PGE must provide a copy of the system impact study to the applicant within five business days of completing the study.
- (j) If PGE determines in a system impact study that interconnection facilities or system upgrades are necessary to safely interconnect a CSP Project, then PGE must perform a facilities study.
- (k) If PGE determines that no interconnection facilities or system upgrades are required, and PGE concludes that the application meets the criteria in section (2), then PGE must approve the application with 15 business days of completion of the system impact study.
- (l) If PGE determines that no interconnection facilities or system upgrades are required and that the CSP Project could be interconnected safely if minor modifications to the transmission or distribution system were made (for example, changing meters, fuses, or relay settings), then PGE must offer the applicant a good-faith, non-binding estimate of the costs of such proposed minor modifications. Modifications are not considered



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minor under this subsection if the total cost of the modifications exceeds \$10,000. If the applicant authorizes PGE to proceed with the minor modifications and agrees to pay the entire cost of the modifications, then PGE must approve the application within 15 business days of the applicant's agreement to pay for the minor modifications.

(7) If PGE is required to perform a facilities study under subsection 6(j), or if an applicant and PGE agree in the scoping meeting to waive the system impact study and proceed directly to the facilities study, then PGE must provide the applicant with an executable facilities study agreement within five business days of completing the system impact study or within five business days from the date of the scoping meeting, whichever is applicable.

(a) The facilities study agreement must include a detailed scope for the facilities study, a reasonable schedule for completion of the study, and a good-faith, non-binding estimate of the costs to perform the study.

(b) The facilities study agreement must follow the standard form agreement developed by PGE and approved by the Commission.

(c) The applicant must execute the interconnection facilities study agreement within 15 business days after receipt of the agreement or the application is deemed withdrawn.

(d) PGE must make reasonable, good-faith efforts to follow the schedule set forth in the facilities study agreement for completion of the study.

(e) The facilities study must identify the interconnection facilities and system upgrades required to safely interconnect the CSP Project and must determine the costs for the facilities and upgrades, including equipment, engineering, procurement, and construction costs. PGE must also identify the electrical switching configuration of the equipment, including transformer, switchgear, meters, and other station equipment.

(f) PGE may contract with a third-party consultant to complete the interconnection facilities and system upgrades identified in the facilities study. PGE and an applicant may agree in writing to allow the applicant to hire a third-party consultant to complete



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the interconnection facilities and system upgrades, subject to PGE oversight and approval.

(g) The interconnection facilities study must include a detailed estimate of the time required to procure, construct, and install the required interconnection facilities and system upgrades.

(h) If the applicant agrees to pay for the interconnection facilities and system upgrades identified in the facilities study, then PGE must approve the application within 15 business days of the applicant's agreement.

(i) If, during the course of the study process PGE identifies network uUpgrades associated with the CSP Project, the network upgrades and the estimated cost for the upgrades must be reviewed and approved for recovery by the Commission prior to PGE approving the application.

(8) PGE may contract with a third-party consultant to complete a system impact study, or facilities study. PGE and an applicant may agree in writing to allow the applicant to hire a third-party consultant to complete a system impact study, or facilities study, subject to PGE oversight and approval.

(9) The interconnection process is not complete until:

(a) PGE approves the application;

(b) Any interconnection facilities or system upgrades have been completed;

(c) Any minor modifications to PGE's transmission or distribution system required under subsections (5)(d), 6(i)(B), or (7)(l) have been completed;

(d) The witness test, if conducted by PGE, is successful; and

(e) The applicant and PGE execute a certificate of completion.



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(10) If a CSP Project is not approved under the Tier 4 interconnection review procedures, then PGE must provide a written explanation of the denial to the applicant.

10. Joint Study Interconnection Review

(1) CSP Projects that request a joint study must agree in writing to be studied together and must meet the following requirements:

(a) The nameplate rating of the joint CSP Projects must be less than 100 percent of the feeder/substation daytime minimum load.

(b) The joint CSP Projects must enter the CSP Queue in back to back queue order.

(c) The joint CSP Projects must have their point of interconnections on the same feeder.

(d) The joint CSP Projects must be within .5 miles of one another.

(e) The study requirements and process will follow the Tier 4 Interconnection Review criteria.

11. Recordkeeping and Reporting Requirements

(1) PGE must maintain a record of the following information for at least two years:

(a) The number of complete interconnection applications received;

(b) The time required to complete the review process for each application; and

(c) The reasons for the approval or denial of each application.

(2) For as long as an interconnection customer's CSP Project is interconnected to PGE's transmission or distribution system, PGE must maintain copies of the interconnection application, interconnection agreement, and certificate of completion for the CSP Project. PGE must provide a copy of the interconnection customer's records to the interconnection customer within 15 business days after receipt of a written request.



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(3) PGE must submit an annual report to the Commission summarizing PGE's interconnection activities for the previous calendar year. The annual report must be filed by May 30 and must include the following information:

(a) The number of complete community solar interconnection applications received;

(b) The number of CSP Project interconnections completed;

(c) The CSP Project's nameplate capacity;

(d) The location of completed and proposed community solar facilities by zip code;

(e) For each Tier 4 interconnection approval, the basic telemetry configuration, if applicable; and

(f) For each Tier 4 interconnection approval:

(A) The interconnection facilities required to accommodate the interconnection of a CSP Project and the estimated costs of those facilities; and

(B) The system upgrades required to accommodate the interconnection of a CSP Project and the estimated costs of those upgrades.

12. Metering and Monitoring

(l) PGE must install, maintain, test, repair, operate, and replace any metering and data acquisition equipment necessary under the terms of PGE's interconnection agreement, power purchase agreement, or power service agreement with an applicant or interconnection customer. The applicant or interconnection customer is responsible for all reasonable costs associated with the metering and data acquisition equipment. PGE and the applicant or interconnection customer must have unrestricted access to such equipment as necessary to conduct routine business or respond to an emergency.

(2) CSP Projects with a nameplate rating of 360 kW or less will need to connect directly to PGE's distribution system and must not be associated with a load. The project can request to be metered on the secondary side (low side) of the distribution transformer.



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Projects receiving service at secondary voltage will be billed based on meter registration less 1-1/2% to account for transformation losses.

(3) CSP Projects with a nameplate rating larger than 360 kW will be required to connect directly to PGE's distribution system at primary voltage.

(4) Except as provided in subsection 3(b), PGE may not require an applicant or interconnection customer with a CSP Project with a nameplate capacity of less than three megawatts to provide or pay for the data acquisition or telemetry equipment necessary to allow PGE to remotely monitor the CSP Project's electric output.

(5) At its discretion, PGE may require an applicant or interconnection customer to pay for the purchase, installation, operation, and maintenance of the data acquisition or telemetry equipment necessary to allow PGE to remotely monitor the CSP Project's electric output if:

(a) The CSP Project has a nameplate capacity equal to 2 megawatts or greater; or

(b) PGE and an applicant or interconnection customer may mutually agree to waive or modify the telemetry requirements in this rule.

(7) Telemetry Requirements.

(a) The communication must take place via a private network link using a frame relay, fractional T-1 line, or other suitable device. Dedicated remote terminal units from the interconnected CSP Project to PGE's substation and energy management system are not required.

(b) A single communication circuit from the CSP Project to PGE is sufficient.

(c) Communications protocol must be DNP 3.0 or another reasonable standard used by PGE.

(d) The CSP Project must be capable of sending telemetric monitoring data to PGE at a minimum rate of every two seconds from the output of the CSP Project's telemetry equipment to PGE's energy management system.



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(e) A CSP Project must provide the following minimum data to PGE:

(A) Net real power flowing out or into the CSP Project (analog);

(B) Net reactive power flowing out or into the CSP Project (analog);

(C) Bus bar voltage at the point of common coupling (analog);

(D) Data processing gateway heartbeat (used to certify the telemetric signal quality);
and

(E) On-line or off-line status (digital).

(f) If an applicant or interconnection customer operates the equipment associated with the high voltage switchyard interconnecting the CSP Project to the transmission or distribution system and is required to provide monitoring and telemetry, then the interconnection customer must provide the following data to PGE in addition to the data in subsection (e):

(A) Switchyard line and transformer megawatt and mega volt ampere reactive values;

(B) Switchyard bus voltage; and

(C) Switching device status.

13. Temporary Disconnection

(1) Under emergency conditions, PGE or an interconnection customer may suspend CSP interconnection service and temporarily disconnect a CSP Project from PGE's transmission or distribution system at any time and for as long as reasonably necessary.

(a) PGE must notify an interconnection customer immediately after becoming aware of an emergency condition that may reasonably be expected to affect a CSP Project's operation. To the extent possible, the notice must describe the emergency condition, the extent of the damage or deficiency, the expected effect on the CSP Project, the anticipated duration of the condition, and the necessary corrective action.



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(b) An interconnection customer must notify PGE immediately after becoming aware of an emergency condition that may reasonably be expected to affect PGE's transmission or distribution system. To the extent possible, the notice must describe the emergency condition, the extent of the damage or deficiency, the expected effect on the public utility's transmission or distribution system, the anticipated duration of the condition, and the necessary corrective action.

(2) PGE or an interconnection customer may suspend CSP interconnection service and temporarily disconnect a CSP Project to perform routine maintenance, construction, or repairs. PGE or an interconnection customer must provide written notice five business days before suspending CSP interconnection service or temporarily disconnecting the CSP Project. PGE and an interconnection customer must use reasonable efforts to coordinate interruptions caused by routine maintenance, construction, or repairs.

(3) PGE must use reasonable efforts to provide written notice to an interconnection customer affected by a forced outage of PGE's transmission or distribution system at least five business days before the forced outage. If prior written notice is not given, then PGE must provide the interconnection customer written documentation explaining the circumstances of the disconnection within five business days after the forced outage.

(4) PGE may disconnect a CSP Project if PGE determines that operation of the CSP Project will likely cause disruption or deterioration of service to other customers served by PGE's transmission or distribution system, or if PGE determines that operation of the CSP Project could cause damage to PGE's transmission or distribution system.

(a) PGE must provide written notice to the interconnection customer of the disconnection at least five business days before the disconnection. If the condition requiring disconnection can be remedied, then PGE must describe the remedial action necessary.

(b) If requested by the interconnection customer, PGE must provide documentation supporting PGE's decision to disconnect.



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(c) PGE may disconnect the CSP Project if the interconnection customer fails to perform the remedial action identified in the notice of disconnection within a reasonable time, but no less than five business days after the interconnection customer received the notice of disconnection.

(5) PGE may temporarily disconnect a CSP Project if an interconnection customer makes any change to the facility, other than a minor equipment modification, without PGE's prior written authorization. PGE may disconnect the CSP Project for the time necessary for PGE to evaluate the affect of the change to the CSP Project on PGE's transmission or distribution system.

(6) PGE has the right to inspect an interconnection customer's CSP Project at reasonable hours and with reasonable prior written notice to the interconnection customer. If PGE discovers that the CSP Project is not in compliance with the requirements of the Schedule and these Standards, then PGE may require the interconnection customer to disconnect the CSP Project until compliance is achieved.

14. Arbitration of Disputes

(1) PGE or an interconnection applicant may petition the Commission for arbitration of disputes arising during review of an application to interconnect a CSP Project or during negotiation of an interconnection agreement. If PGE or the applicant petitions the Commission to arbitrate their dispute, then the Commission will use an administrative law judge (ALJ) as arbitrator unless workload constraints necessitate the use of an outside arbitrator.

(2) A petition for arbitration of an interconnection agreement must contain:

(a) A statement of all unresolved issues;

(b) A description of each party's position on the unresolved issues; and

(c) A proposed agreement addressing all issues, including those on which the parties have reached agreement and those that are in dispute.



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(3) A petition for arbitration of a dispute arising during review of an application to interconnect a CSP Project must contain:

(a) A statement of all unresolved issues;

(b) A description of each party's position on the unresolved issues; and

(c) A proposed resolution for each unresolved issue.

(4) Respondent may file a response within 25 calendar days of the petition for arbitration. In the response, the respondent must address each issue listed in the petition, describe the respondent's position on those issues, and present any additional issues for which the respondent seeks resolution.

(5) The filing of a petition for arbitration of a dispute arising during review of an application to interconnect a CSP Project does not affect the application's queue position.

(6) The arbitration is conducted in a manner similar to a contested case proceeding, and the arbitrator has the same authority to conduct the arbitration process as an ALJ has in conducting hearings under the Commission's rules, but the arbitration process is streamlined. The arbitrator holds an early conference to discuss processing of the case. The arbitrator establishes the schedule and decides whether an oral hearing is necessary. After the oral hearing or other procedures (for example, rounds of comments), each party submits its final proposed interconnection agreement or resolution of disputed issues. The arbitrator chooses between the two final offers. If neither offer is consistent with applicable statutes, Commission rules, and Commission policies, then the arbitrator will make a decision that meets those requirements.

(7) The arbitrator may allow formal discovery only to the extent deemed necessary. Parties are required to make good faith attempts to exchange information relevant to any disputed issue in an informal, voluntary, and prompt manner. Unresolved discovery disputes are resolved by the arbitrator upon request of a party. The arbitrator will order a party to provide information if the arbitrator determines the requesting party has a



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reasonable need for the requested information and that the request is not overly burdensome.

(8) Only the two negotiating parties have full party status. The arbitrator may confer with Commission staff for assistance throughout the arbitration process.

(9) To keep the process moving forward, appeals to the Commission are not allowed during the arbitration process. An arbitrator may certify a question to the Commission if the arbitrator believes it is necessary.

(10) To accommodate the need for flexibility, the arbitrator may use different procedures so long as the procedures are fair, treat the parties equitably, and substantially comply with the procedures listed here.

(11) The arbitrator must serve the arbitration decision on the interconnecting public utility and the interconnection applicant. The parties may file comments on the arbitration decision with the Commission within 10 calendar days after service.

(12) The Commission must accept, reject, or modify an arbitration decision within 30 calendar days after service of the decision.

(13) Within 14 calendar days after the Commission issues an order on a petition for arbitration of an interconnection agreement, the petitioner must prepare an interconnection agreement complying with the terms of the decision and serve it on respondent. Respondent must either sign and file the interconnection agreement or file objections to it within 10 calendar days of service of the agreement. If objections are filed, respondent must state how the interconnection agreement fails to comply with the Commission order and offer substitute language complying with the decision. The Commission must approve or reject a filed interconnection agreement within 20 calendar days of its filing or the agreement is deemed approved.

(14) If petitioner, without respondent's consent, fails to timely prepare and serve an interconnection agreement on respondent, respondent may file a motion requesting the Commission dismiss the petition for arbitration with prejudice. The Commission may grant such motion if the petitioner's failure to timely prepare and serve the



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interconnection agreement was the result of inexcusable neglect on the part of petitioner.

(15) The public utility and the applicant may agree to hire an outside arbitrator rather than file a petition with the Commission. The public utility and the applicant must share equally the costs of an outside arbitrator unless they mutually agree to a different payment arrangement.

15. Complaints for Enforcement

(1) This rule specifies the procedure PGE, an interconnection customer, or an applicant to file a complaint for the enforcement of an interconnection agreement. Filing dates for enforcement complaint proceedings are calculated and enforced per OAR 860-001-0150.

(2) At least 10 days prior to filing a complaint for enforcement, complainant must give written notice to defendant and the Commission that complainant intends to file a complaint for enforcement. The notice must identify the provisions in the agreement that complainant alleges were or are being violated and the specific acts or failure to act that caused or are causing the violation, and whether complainant anticipates requesting temporary or injunctive relief. On the same day the notice is filed with the Commission, complainant must serve a copy of the notice on defendant's authorized representative, attorney of record, or designated agent for service of process. Complainant must also serve the notice on all persons designated in the interconnection agreement to receive notices;

(3) A complaint for enforcement must:

(a) Contain a statement of specific facts demonstrating that the complainant conferred with defendant in good faith to resolve the dispute, and that despite those efforts the parties failed to resolve the dispute;

(b) Include a copy of the written notice, required by section (2), indicating that the complainant intends to file a complaint for enforcement;



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(c) Include a copy of the interconnection agreement or the portion of the agreement that the complainant contends that defendant violated or is violating. If a copy of the entire agreement is provided, complainant must specify the provisions at issue;

(d) Contain a statement of the facts or law demonstrating defendant's failure to comply with the interconnection agreement and complainant's entitlement to relief. The statement must indicate that the remedy sought is consistent with the dispute resolution provisions in the agreement, if any. Statements of facts must be supported by written testimony with affidavits made by persons competent to testify and having personal knowledge of the relevant facts. Statements of law must be supported by appropriate citations. If exhibits are attached to the affidavits, the affidavits must contain the foundation for the exhibits;

(e) Designate up to three persons to receive copies of pleadings and documents;

(f) Include an executive summary, filed as a separate document not to exceed 8 pages, outlining the issues and relief requested; and

(g) Include any motions for affirmative relief, filed as a separate document and clearly marked. Nothing in this subsection precludes complainant from filing a motion subsequent to the filing of the complaint if the motion is based upon facts or circumstances unknown or unavailable to complainant at the time the complaint was filed.

(4) On the same day the complaint is filed with the Commission, complainant must serve a copy of the complaint on defendant's authorized representative, attorney of record, or designated agent for service of process. Service may be by telephonic facsimile, electronic mail, or overnight mail, but the complaint must arrive at defendant's location on the same day the complaint is filed with the Commission. Service by facsimile or electronic mail must be followed by a physical copy of the complaint the next day by overnight delivery.

(5) Within 10 business days after service of the complaint, defendant may file an answer with the Commission. Any allegations raised in the complaint and not addressed in the answer are deemed admitted. The answer must:



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- (a) Contain a statement of specific facts demonstrating that the defendant conferred with complainant in good faith to resolve the dispute and that despite those efforts the parties failed to resolve the dispute;
- (b) Respond to each allegation in the complaint and set forth all affirmative defenses;
- (c) Contain a statement of the facts or law supporting defendant's position. Statements of facts must be supported by written testimony with affidavits made by persons competent to testify and having personal knowledge of the relevant facts. Statements of law must be supported by appropriate citations. If exhibits are attached to the affidavits, then the affidavits must contain the foundation for the exhibits; and
- (d) Designate up to three persons to receive copies of other pleadings and documents.
- (6) On the same day as the answer is filed, the defendant must also file its response to any motion filed by complainant and its motions for affirmative relief. Each response and each motion must be filed as a separate filing. Nothing in this section precludes defendant from filing a motion subsequent to the filing of the answer if the motion is based upon facts or circumstances unknown or unavailable to defendant at the time the answer was filed.
- (7) On the same day the answer is filed with the Commission, the defendant must serve a copy of the answer to the complainant's authorized representative, attorney of record, or designated agent for service of process.
- (8) Complainant must file a reply to an answer that contains affirmative defenses within 5 business days after the answer is filed. On the same day the reply is filed with the Commission, complainant must serve a copy of the reply to defendant's authorized representative, attorney of record, or designated agent for service of process.
- (9) A cross-complaint or counterclaim must be answered within the 10-business day time frame allowed for answers to complaints.
- (10) The Commission will conduct a conference regarding each complaint for enforcement of an interconnection agreement.



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(a) The administrative law judge (ALJ) schedules a conference within 5 business days after the answer is filed, to be held as soon as practicable. At the discretion of the ALJ, the conference may be conducted by telephone.

(b) Based on the complaint and the answer, all supporting documents filed by the parties, and the parties' oral statements at the conference, the ALJ determines whether the issues raised in the complaint can be determined on the pleadings and submissions without further proceedings or whether further proceedings are necessary. If further proceedings are necessary, the ALJ establishes a procedural schedule. Nothing in this subsection is intended to prohibit the bifurcation of issues where appropriate.

(c) In determining whether further proceedings are necessary, the ALJ must consider, at a minimum, the positions of the parties, the need to clarify evidence through the examination of witnesses, the complexity of the issues, the need for prompt resolution, and the completeness of the information presented.

(d) The ALJ may make oral rulings on the record during the conference on all matters relevant to the conduct of the proceeding.

(11) A party may file with the complaint or answer a request for discovery, stating the matters to be inquired into and their relationship to matters directly at issue.

(12) When warranted by the facts, the complainant or defendant may file a motion requesting that an expedited procedure be used. The moving party must file a proposed expedited procedural schedule along with its motion. The ALJ must schedule a conference to be held as soon as practicable to determine whether an expedited schedule is warranted.

(a) The ALJ will consider whether the issues raised in the complaint or answer involve a risk of imminent, irrevocable harm to a party or to the public interest.

(b) If a determination is made that an expedited procedure is warranted, the ALJ will establish a procedure that ensures a prompt resolution of the merits of the dispute, consistent with due process and other relevant considerations. The ALJ will consider, but is not bound by, the moving party's proposed expedited procedural schedule.



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(c) In general, the ALJ will not entertain a motion for expedited procedure where the dispute solely involves the payment of money.