Distributed Energy Resources Connection Process

Burlington Hydro Inc. Distribution System
June 10, 2025, Revision 1.0

The following document defines the process for connecting distributed energy resources to Burlington Hydro Inc (BHI) distribution system as defined by Ontario Energy Board Documents Distribution System Code and Distributed Energy Resource Connection Procedures.

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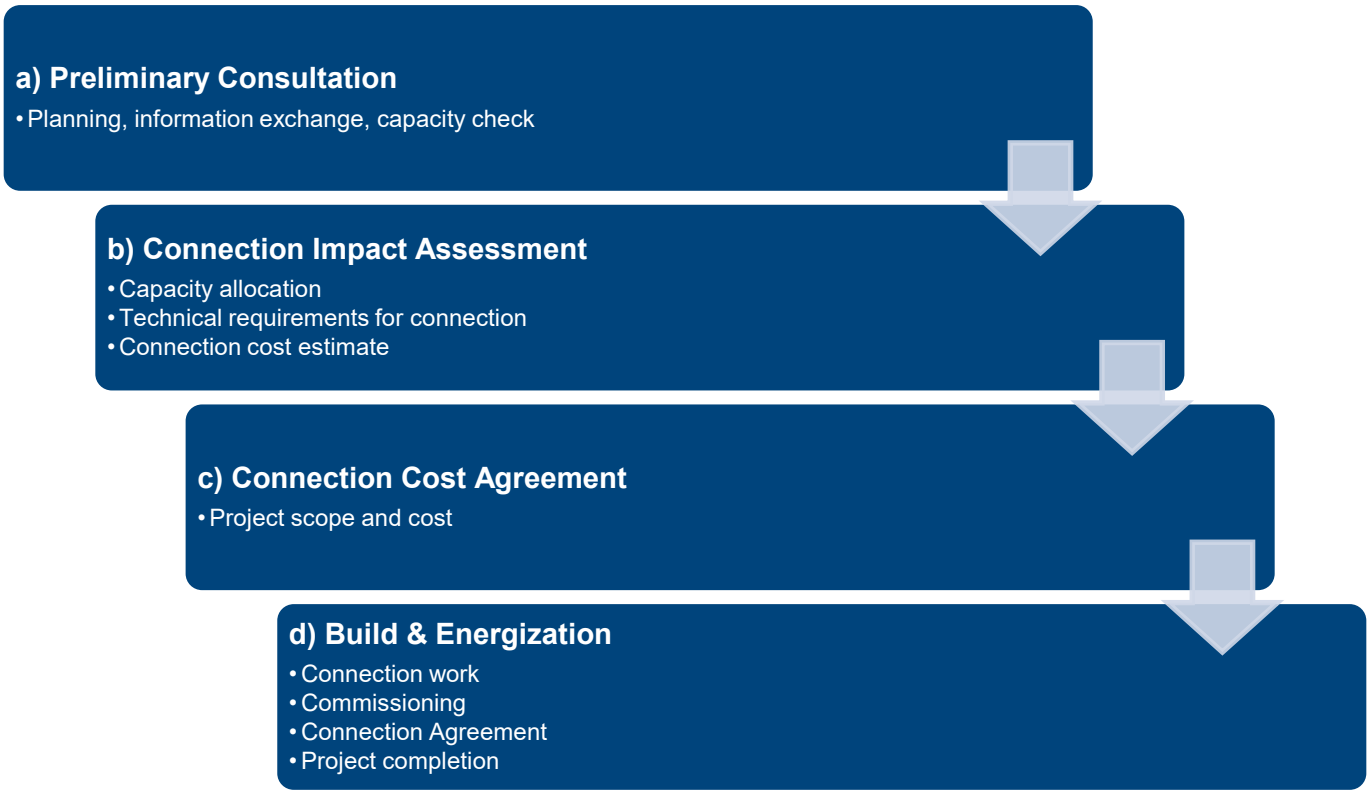
1. Procedures Overview



(Reference: Distributed Energy Resources Connection Procedures Version 2.0, Figure 1)

Special Note:

Proponents applying for the connection of distributed energy resources to Burlington Hydro's distribution system are the sole responsibility of Burlington Hydro Inc (BHI). Small, mid-sized and large generation projects may involve a host distributor, transmitter or the Independent Electricity System Operator throughout the application and connection process. BHI will remain the sole primary contact between the applicant and all distribution or transmission companies. All applicants requiring contracts with the Independent Electricity System Operator for exporting energy to the distribution system are required to complete the process with the IESO directly.

2. Connection Process Documents

The following documents are available on the BHI website for applicant use:

- Preliminary Consultation Information Request
- DER Restricted Feeder List
- Connection Impact Assessment Application
- Micro-Embedded Generation Facility Connection Application
- Micro-Embedded Generation Facility Connection Agreement

The following documents are provided to applicants during the connection process:

- Preliminary Consultation Report
- Site Assessment Report
- Offer to Connect, Connection Cost Estimate, Connection Cost Agreement (small, mid-sized, large)
- Micro-Embedded Generation Facility Offer to Connect

3. Regulatory Documents

- Distribution System Code – Ontario Energy Board website
- Distributed Energy Resources Connection Procedure – Ontario Energy Board website
- BHI Conditions of Service – BHI website

4. Definitions

Applicant

An applicant means a person who approaches a distributor and requests to connect or information to connect a DER to a distributor's system.

Connection Impact Assessment (CIA)

A connection impact assessment means a study performed by or on behalf of the distribution company to assess the impact of a proposed DER connection on its system. The CIA will specify technical requirements for the connection.

Distributed Energy Resource (DER)

Distributed Energy Resource (DER) means, for the purposes of the DERCP, an electricity source or load that is connected to a distribution system, typically through a connection on the customer-side of an ownership demarcation point. Sources generate electricity (e.g. generation facilities, including energy storage facilities when discharging), while loads do not generate electricity (e.g. energy storage facilities when charging).

Generation Classification

DER Classification	Rating	Sample List of Studies
Micro	<= 10 kW	None
Small	(a) <= 500 kW connected on distribution system voltage < 15kV (b) <= 1 MW connected on distribution system voltage >= 15kV	1. Distributor (or Embedded Distributor) 2. Host Distributor (if applicable)
Mid-Sized	(a) <= 10 MW but > 500 kW connected on distribution system voltage < 15kV (b) > 1 MW but <= 10MW connected on distribution system voltage >= 15kV	1. Distributor (or Embedded Distributor) 2. Host Distributor (if applicable) 3. Transmitter (if applicable)
Large	> 10 MW	1. Distributor (or Embedded Distributor) 2. Host Distributor (if applicable) 3. Transmitter 4. IESO System Impact Assessment

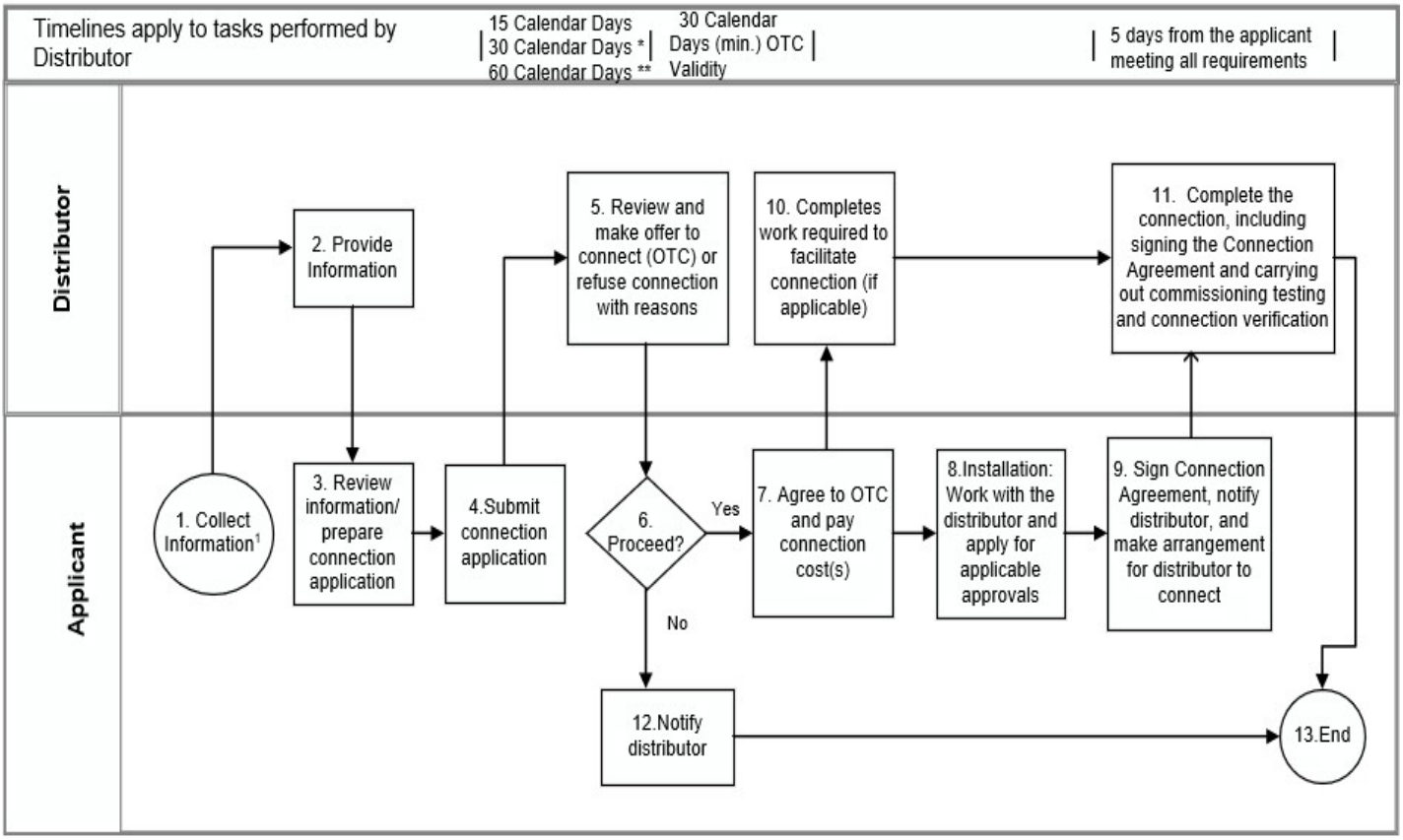
5. Processes

5.1 Micro Embedded Generation Facility

Micro-embedded generation facilities are equal to or less than 10 kW and are considered to pose a relatively low connection risk to the distribution system compared to larger generation facilities. The process flowchart is outlined below in Figure 2: Flowchart of Timelines and Responsibilities for Micro Embedded Generation Facility Connection. The distributor (in accordance with Section 6.2.6 of the DSC) and applicants are expected to follow the steps outlined below.

(Distributed Energy Resources Connection Procedures Version 2.0, Figure 2)

Connection Process: Micro Generation Facility



* If at existing connection and site assessment needed ** If not located at existing customer connection

[1] Check distributor webpage for information on process, forms and other helpful info, including how to apply.

Step 1	The applicant proposing to connect a micro generation facility checks the distributor's DER webpage for information on processes, forms and other helpful information, including how to apply. The applicant can also contact the distributor and the Electric Safety Authority (ESA) to obtain more information on connection process and requirements.
Step 2	The distributor makes the information on connection process available to the applicant in a timely manner. The information package includes the description of the connection process approvals needed by the distributor for connection, technical requirements including metering, contractual requirements (Micro-Embedded Generation Facility Connection Agreement), and application forms.
Step 3	The applicant reviews relevant information and prepares a connection application that includes: • an installation plan, including the size, type of generation (e.g. net metering and non-exporting) facility; and • a project plan.
Step 4	The applicant submits a connection application to the distributor for its review.
Step 5	Within the prescribed timeline, which varies based on the facility location, the distributor shall either provide the applicant with an offer to connect (OTC) or a refusal to connect, including reasons for the decision, as outlined in sections 5.3.2, 5.3.4, and 5.3.5 below. The distributor's review of an application submitted for the connection of a micro generation facility will include: • typical requirement for new meter. • check for service upgrade requirement. • check for significant amount of other generation on feeder. • response to the applicant with an offer to connect or refusal; and • response to applicant with requirements specific to the connection (typically requirements for metering) and costs, timing to implement, etc.
Step 6	The applicant decides whether to proceed with the connection. If so, proceed to step 7. If not, proceed to step 12.
Step 7	The applicant must indicate his intention to connect. Within validity period of the OTC, which shall be at least 30 days, the applicant

	accepts the OTC and pays the required connection cost(s).
Step 8	During the installation phase, the applicant should work closely with the distributor, the ESA, and any other organizations from which work, inspections, approvals, or licenses are required to prevent delays. The activities will be planned in coordination with project milestones, and it is up to the applicant to initiate actions at the required times.
Step 9	The applicant reviews and signs the connection agreement, notifies the distributor, and makes arrangement for the distributor to connect.
Step 10	The distributor completes any work required to facilitate the connection to the distribution system (if applicable).
Step 11	Subject to the provisions of section 6.2.7 of the DSC, the distributor works with the applicant to complete the connection, including signing the connection agreement and carrying out any commissioning testing and connection verification.
Step 12	If the applicant decides not to proceed with the connection (step 6), the applicant notifies the distributor of the applicant's decision not to proceed with the connection process and then proceeds to step 13.
Step 13	The connection process ends.

5.1.1 If the proposed facility is located at an existing customer connection and does not require a site assessment, the distributor shall make an offer to connect within 15 days of receiving a completed application or provide reasons for refusing to connect.

5.1.2 The distributor shall not charge the applicant to prepare the offer to connect outlined in section 5.1.1 above.

5.1.3 If the proposed facility is located at an existing customer connection and requires a site assessment, the distributor shall make an offer to connect within 30 days of receiving a completed application or provide reasons for refusing to connect.

5.1.4 If the proposed facility is not located at an existing customer connection, the distributor shall make the offer to connect within 60 days of receiving a completed application or provide reasons for its refusal.

5.1.5 In all cases, the distributor shall give the applicant at least 30 days to

accept the offer to connect and the distributor shall not revoke the offer to connect until this period has expired.

5.1.6 If a site assessment is needed, the distributor may charge a $500 connection deposit for preparing the offer to connect, which shall be payable in the form of cash, cheque, electronic funds transfer, letter of credit from a bank, or surety bond.

5.1.7 If the distributor refuses the connection after a site visit, it shall return the deposit within 30 days.

5.1.8 If the applicant does not accept the offer or withdraws its application, the distributor will keep the deposit.

5.1.9 If actual connection costs are less than the deposit, the distributor shall refund the difference when the connection is completed and in service.

5.1.10 Interest shall accrue monthly on connection deposits made by way of cash or cash equivalents commencing on receipt of the total deposit required by the distributor. The interest rate shall be at the Prime Business Rate as published on the Bank of Canada website less 2 percent, updated quarterly. Refunds, in whole or part, of deposits made in cash or cash equivalents shall include interest in the refunded amount from the date of receipt.

5.1.11 An applicant must notify the distributor that it has satisfied all applicable service conditions and received all necessary approvals including confirmation of issuance of the authorization to connect from the ESA.

5.1.12 The applicant must enter into a Connection Agreement and pay the required connection costs, including costs for any necessary new or modified metering.

5.1.13 Once these conditions have been satisfied, the distributor shall connect the applicant's micro generation facility to its distribution system within 5 business days, or at such a later date as agreed by the DER applicant and the distributor.

5.1.14 The distributor must meet the five-day requirement for connection 90 percent of the time on a yearly basis.

5.2 Connection Application Processes for Small, Mid-Sized, and Large Generation Facility Projects

The connection application processes for small, mid-sized, and large generation facilities are similar, with the differences primarily being the number and complexity of connection impact assessments required which will vary on a project-to-project basis and depend on the size of the project and the connection point to the system. Unlike the micro generation facility process, the connection process for small, mid-sized, and large generation facilities includes a common screening process on application intake.

5.3 CIA Screening Process

CIA applications are subject to a review for completeness, i.e. a screening process. The screening process is intended to provide feedback to the applicant early in the process on any deficiencies in their submission that would prevent a distributor from proceeding with a review. Upon submission of an application, the distributor confirms if the application is substantially complete. A substantially complete application is a submission in which there is sufficient information provided for the distributor to process the application and complete the CIA. To aid an applicant in determining the information requirements that a distributor would typically deem as being sufficient information, a sample application package has been provided in the Appendix C(vii).

The sample application package includes:

- ***5.3.1*** Completed application
- ***5.3.2*** Single line diagram sample
- ***5.3.3*** Protection philosophy sample
- ***5.3.4*** Submission checklist

In order to facilitate timely processing of applications, payment[2] for the applicable studies should be included with the submission when possible. The fees for required studies and assessments should be identified on the distributor's website and on the PCR.

If the application is incomplete, the distributor will return the incomplete part of the application package to the applicant with a deficiency notification identifying the errors and omissions in the application. Upon receipt of a deficiency notification, an applicant should review and correct the application and resubmit the revised application within 14 days. If the application is not returned in 14 days, the application may lose its position in the processing queue.

Upon receipt of a revised CIA application, the distributor must review the application within 7 days to determine if there is sufficient information for the distributor to process the application. If there is sufficient information, the submission is deemed substantially complete, and the distributor will reconfirm that the distribution and transmission capacity that was available at the preliminary consultation stage remains available. Please note that capacity is not reserved until the CIA is completed. If capacity is available, the distributor will notify the applicant and proceed to perform a CIA. The date the submission is deemed substantially complete starts the time-day window for the distributor to send the completed CIA to the applicant.

The process flowchart for determining the status of an application using the screening process is outlined in Figure 3. The corresponding procedure steps for the distributor and applicant to follow are outlined below the flowchart.

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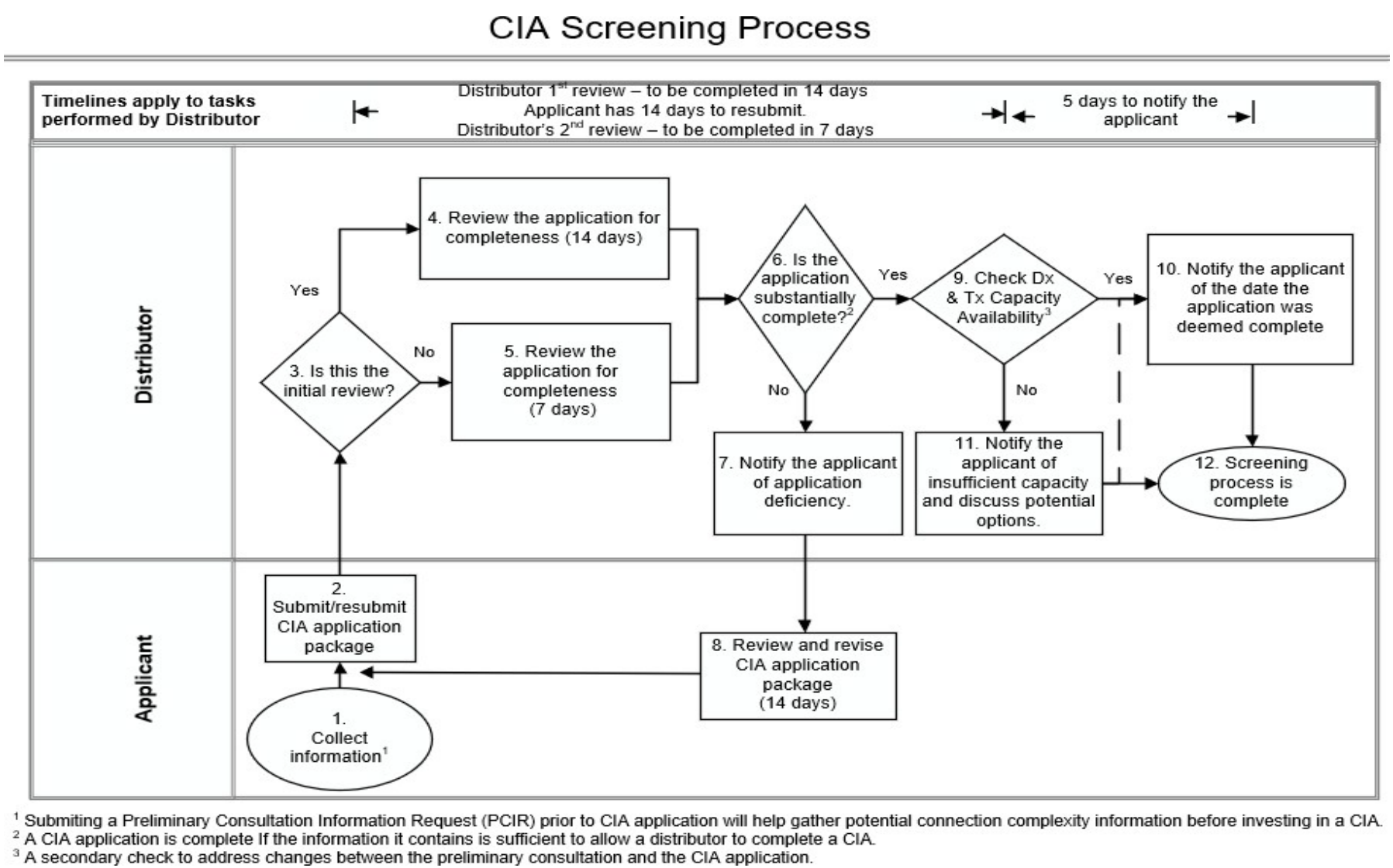
[2] Distributors are to identify required study cost in the Preliminary Consultation Report.

(Distributed Energy Resources Connection Procedures Version 2.0, Figure 3)

Figure 3: CIA Screening Process



[1] Submiting a Preliminary Consultation Information Request (PCIR) prior to CIA application will help gather potential connection complexity information before investing in a CIA.
[2] A CIA application is complete If the information it contains is sufficient to allow a distributor to complete a CIA.
[3] A secondary check to address changes between the preliminary consultation and the CIA application.

Step 1	The applicant begins the process by collecting any needed information. The applicant can submit a PCIR prior to a CIA application to gather potential connection complexity information specific to the generation facility.
Step 2	The applicant submits the completed CIA application package, including completed application form, payment for required studies, attachments, application checklist, and the PCR (if available).
Step 3	The distributor determines if this is the initial application submission or a revised application submission. If it is the initial submission, proceed to step 4. If it is a revised submission, proceed to step 5.
Step 4	For initial application submission, the distributor reviews the application to determine whether it is missing any required information. A review must be completed within 14 days.
Step 5	For revised application submission, the distributor reviews the revised application to determine whether it is missing any required information. A review must be completed within 7 days.
Step 6	For the completeness check outlined in steps 4 and 5, the distributor reviews the application to determine if the information the applicant provided is sufficient to allow the distributor to complete a CIA. If the distributor deems the application incomplete, proceed to step 7. If the distributor deems the application complete, proceed to step 9.
Step 7	For submissions that are not substantially complete, the distributor will notify the applicant of the application deficiencies via email or letter (if the applicant's email is not provided). The deficiency notification shall identify any errors and omissions in the application that would prevent the distributor from proceeding with the CIA. The notification shall outline the available remedies required to have the application deemed substantially complete.
Step 8	On receipt of a deficiency notification, an applicant should review and revise the application to address the deficiencies and resubmit the application. The process allows 14 days for the applicant to resubmit a revised application. If the applicant does not return the revised application within 14 days, it may be treated as a new application once it is resubmitted.
Step 9	For submissions that are deemed substantially complete, the distributor will reconfirm distribution and transmission capacity availability. This is a secondary check to address changes between

	the pre-consultation phase and the CIA application. The distributor may carry out a capacity check before the application completeness review. If capacity is available, proceed to step 10. If capacity is not available, proceed to step 11.
Step 10	The distributor notifies the applicant of within 5 calendar days of when the application is deemed substantially complete. The date the application is deemed substantially complete starts with the timed-day window for the distributor to send the completed CIA to the applicant.
Step 11	If capacity is not available, the distributor will notify the applicant that capacity is not available to support the connection and may offer a flexible hosting capacity arrangement if the distributor has this option available. If the distributor and the applicant agree to explore a flexible hosting capacity arrangement, proceed to step 10. If not, process to step 12.
Step 12	The screening process is complete.

5.4 CIA Process for Small, Medium, and Large Generation Facilities

The next step in the connection process is the completion of the CIA. The overall CIA timelines are as follows:

For small generation facilities the distributor shall provide an applicant proposing to connect with its assessment of the impact of the proposed generation facility, a detailed cost estimate of the proposed connection and an offer to connect within:

a) 60 days of receipt of the complete application where no distribution system reinforcement or expansion is required; and

b) 90 days of receipt of the complete application where a distribution system reinforcement or expansion is required.

For mid-sized and large generation facilities, after receiving a complete CIA application, a distributor shall respond with its CIA:

a) within 60 days for a mid-sized generation facility.

b) within 90 days for a large generation facility.

c) within 75 days for a mid-sized generation facility when a host distributor/transmitter CIA is also needed; and

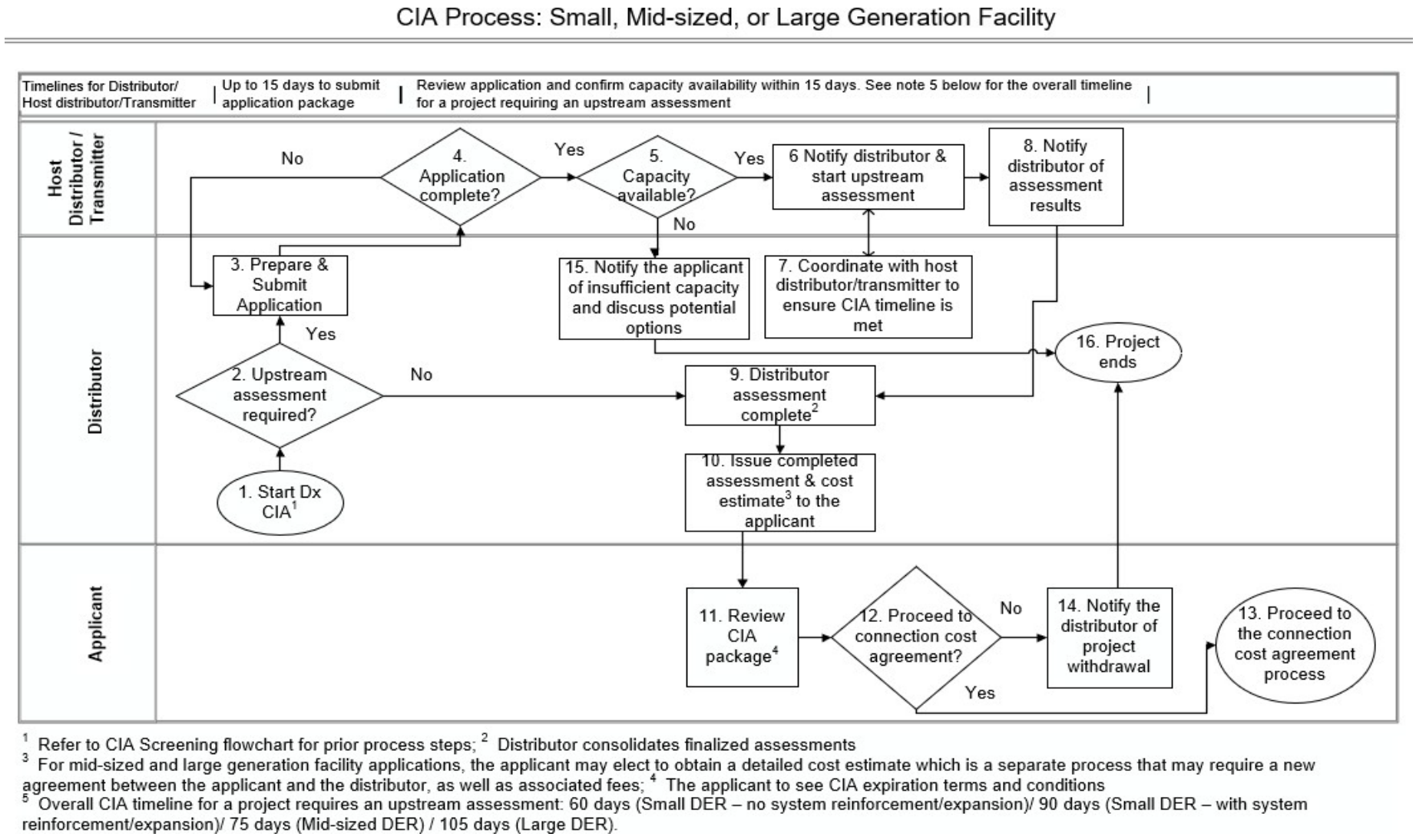
d) within 105 days for a large generation facility when a host distributor/transmitter CIA is also needed.

The distributor must ensure that only 15 days are added to the overall CIA timeline for mid-sized and large projects when an upstream assessment is required.

The flowchart in Figure 4 describes the process for performing the CIA. The corresponding procedure steps for the distributor and applicant are outlined below the flowchart.

(Distributed Energy Resources Connection Procedures Version 2.0, Figure 4)

Figure 4: CIA Process for Small, Mid-sized, or Large Generation Facility



[1] Refer to CIA Screening flowchart for prior process steps; [2] Distributor consolidates finalized assessments
[3] For mid-sized and large generation facility applications, the applicant may elect to obtain a detailed cost estimate which is a separate process that may require a new agreement between the applicant and the distributor, as well as associated fees; [4] The applicant to see CIA expiration terms and conditions
[5] Overall CIA timeline for a project requires an upstream assessment: 60 days (Small DER – no system reinforcement/expansion)/ 90 days (Small DER – with system reinforcement/expansion)/ 75 days (Mid-sized DER) / 105 days (Large DER).

Step 1	The distributor initiates the distribution CIA when the CIA application is deemed substantially complete and gathers required information.
Step 2	The distributor determines if an upstream assessment from a host distributor/transmitter is required. If so, proceed to step 3. If not, proceed to step 9.
Step 3	If an upstream assessment is required, the distributor submits the completed CIA application package to the host distributor/transmitter, including completed application form, payment for required studies, attachments, and application checklist. The distributor must submit a completed application as soon as possible and no later than 15 days after starting the downstream CIA to ensure there is adequate time for the host distributor/transmitter to carry out upstream assessments(s) and to consolidate upstream assessment results into the distributor's CIA. The distributor must include information on the expected timeline for the host distributor CIA in its application, in accordance with the project classification and the date the CIA application is deemed substantially complete in Step 1.
Step 4	The host distributor/transmitter reviews the application and determines if the application is complete. If additional information or changes to the application is/are needed, the host distributor/transmitter must inform the distributor as soon as possible, and no later than 15 days. This ensures there is sufficient time for the distributor to submit the revised application package and for the upstream assessment to be completed concurrently with the distributor's CIA.
Step 5	The host distributor/transmitter confirms there is capacity for the connection. This check can take place again during the CIA process. If there is capacity available, proceed to step 6. If not, notify the distributor there is insufficient capacity and discuss the feasibility of a flexible hosting capacity arrangement.
Step 6	If the application is complete and capacity is available, the host distributor/transmitter notifies distributor and begins the upstream assessment.
Step 7	Distributor coordinates with the host distributor/transmitter to ensure the host distributor/transmitter sends the upstream assessment in time for the distributor to complete the distribution CIA within the prescribed CIA timeline. The overall CIA timeline for a project requires an upstream assessment based on the size of the proposed DER:

	• Small DER:
	  ○ 60 days (without system reinforcement/expansion)
	  ○ 90 days (with system reinforcement/expansion)
	• Mid-sized DER: 75 days
	• Large DER: 105 days

Step 8	The host distributor/transmitter notifies distributor of assessment results.
Step 9	Upon receiving upstream assessment results, the distributor completes its CIA.
Step 10	The distributor issues a complete CIA and cost estimate to the applicant. For mid-sized and large generation facility applications, the applicant may elect to obtain a detailed cost estimate which is a separate process that may require a new agreement between the applicant and the distributor, as well as associated fees.
Step 11	The applicant will review the CIA package and sign the connection cost agreement within a prescribed timeline, in accordance with the terms and conditions regarding the expiration of the capacity allocation.
Step 12	The applicant decides whether to proceed to the connection cost agreement to move forward with the connection process. If so, proceed to step 13. If not, proceed to step 15.
Step 13	The applicant proceeds to the connection cost agreement process.
Step 14	If the applicant decides not to proceed, notify the distributor in writing of project withdrawal.
Step 15	Upon receiving the notification from the host distributor/transmitter that there is insufficient capacity in Step 5, the distributor notifies the applicant. The distributor identifies the potential for entering into a flexible hosting capacity arrangement.
Step 16	Project ends due to insufficient capacity, or the applicant’s decision not to proceed to the connection cost agreement process.

5.5 Simplified CIA Process

A distributor shall offer a simplified CIA process to small DERs that meet distributor-specific criteria, such as, but not limited to, a nameplate rated capacity threshold and receive confirmation from the distributor.

The simplified CIA process is expected to reduce assessment costs and timelines for a subset of small DERs.

5.6 CIA Process for Flexible Hosting Capacity Arrangements

A distributor may offer a flexible hosting capacity arrangement to a proposed DER when the entire requested capacity is not available in the normal capacity allocation process, and when it is cost effective and technically feasible to proceed. Under a flexible hosting arrangement, the proposed DER's output or operation can be varied according to system operating conditions as agreed to by the distributor and DER customer. This arrangement will enable a distributor to optimize the capacity available on its distribution system and support greater DER adoption, through use of technologies such as a DER management system (DERMs).

In the case of flexible hosting capacity arrangements, the distributor is not required to adhere to the prescribed timelines for CIA, as mentioned under section 5.6, and capacity allocation timeline or CIA validation timeline, as mentioned under process step 1 of Figure 5. However, the distributor is expected to follow, as closely as possible, the processes set out above in the flow charts. In setting out to offer flexible hosting arrangements, a distributor will establish reasonable timelines for CIA and capacity allocation to ensure timely connections and avoid creating new connection barriers to other prospective DER customers. The distributor will aim to provide the technical requirements and estimated cost for the proposed connections as soon as possible without affecting the timelines for other connections that are ahead of the applicant.

The distributor must inform prospective DER customers and include information in the DER connection section of its website about whether they offer flexible hosting capacity arrangements. The distributor will also confirm the feasibility through the preliminary consultation and CIA processes.

5.7 Connection Cost Estimates

When a distributor provides the applicant with the technical requirements for the proposed connection as a result of a CIA, the distributor shall also provide a cost estimate for the connection. At this stage, the cost is usually based on typical pricing, with the distributor indicating the anticipated level of uncertainty in the estimate.

5.7.1 Cost estimate timeline extension for a mid-sized or large generation facility

During the CIA process, when a distributor anticipates needing additional time to carry out a cost estimate for a mid-sized or large generation facility, it may assess whether the project meets the criteria below for a timeline extension. Upon confirmation, the distributor must document the rationale for the extension, detailing how the criteria are met, and inform the applicant of the need for extra time, including the rationale for the extension and the revised timeline for the cost estimate. This extension does not change the prescribed timeline the distributor must adhere to when providing the applicant with the technical requirements for connecting to the distributor's system.

The following criteria must be used by the distributor to assess whether a timeline extension can be applied to a specific project:

5.7.1.1.1 In comparison to historical projects, the project must include one or more connection work items that are atypical or complex where the distributor:

5.7.1.1.2 needs to carry out additional technical and cost evaluation of various options to determine the most suitable and cost- effective solution for the applicant, or

5.7.1.1.3 cannot obtain the estimated cost from potential vendors or through information sharing with other distributors in time, or

5.7.1.1.4 must carry out additional studies to implement a complex operational arrangement requested by the applicant such as islanding mode to enable microgrid configuration

and

5.7.1.1.5 The additional days the distributor plans to take must lead to a meaningful improvement in the accuracy of the cost estimate. If the potential cost difference is not material, the distributor should provide the cost estimate simultaneously with the technical requirements for connection.

A distributor can take up to 30 days after issuing the CIA with the technical requirements for a connection, to complete the cost estimate for a mid-sized or large project that meets both criteria listed above. The distributor must indicate on its website that a project that meets the criteria may require additional time for the cost estimate.

5.7.2 Option to Request a More Detailed Cost Estimate

Upon receipt of the CIA, an applicant for a mid-sized or large generation facility has the option to request a more detailed cost estimate prior to entering into the Connection Cost Agreement.

To obtain a detailed estimate, the applicant must make a written request for the estimate. If necessary, the distributor and applicant may enter into an agreement for the preparation of the detailed cost estimate, and the applicant may be responsible for paying the distributor's costs for preparation of the detailed cost estimate. Within 10 days of receiving the payment from the applicant for a mid-sized or large DER, the distributor shall inform the host distributor/transmitter that it is preparing an estimate. For a small DER, the distributor shall only inform the host distributor/transmitter, within 10 days of receiving payment, if it

believes their system may be impacted by the proposed DER. The distributor shall provide the applicant with the detailed cost estimate and an offer to connect by the later of 90 days after the receipt of payment from the applicant and 30 days after the receipt of comments from a host distributor/transmitter.

When the proposed connection is under a flexible hosting capacity arrangement, the distributor will make the best effort to follow the timelines mentioned above

6. Connection Cost Agreement

Once the distributor and transmitter or host distributor have completed their respective CIAs and cost estimates, the process moves to the Connection Cost Agreement phase and then moves to the Build & Energization phase which requires a Connection Agreement.

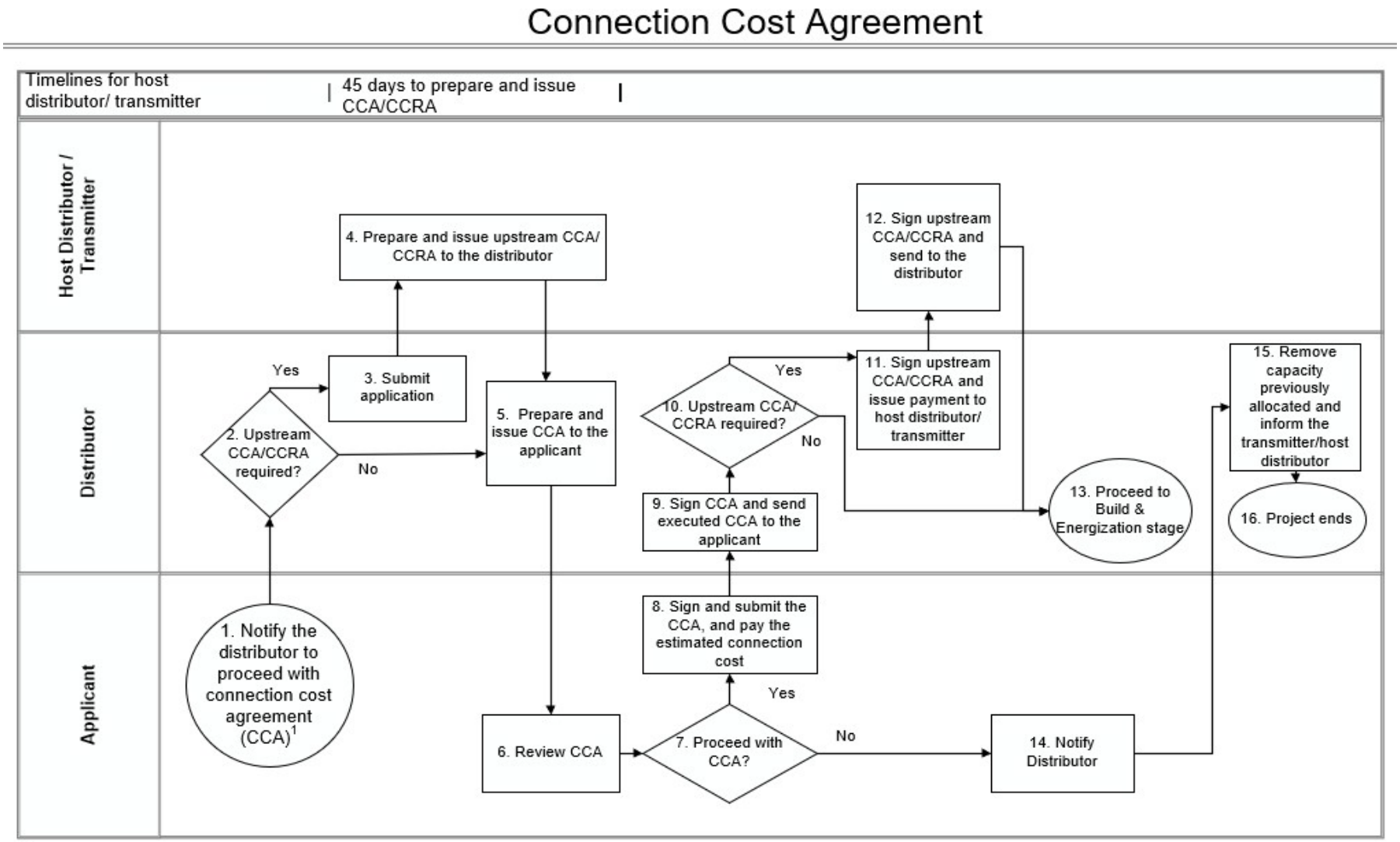
6.1. Connection Cost Agreement

The Connection Cost Agreement (CCA) sets out the scope of work and the associated cost the distributor will recover from the applicant to connect the project to the distribution system. If the connection affects a host distributor's distribution system or the transmission system, the host distributor will complete a CIA and require a CCA while the transmitter will complete a transmitter study and require a Connection and Cost Recovery Agreement (CCRA). In cases where a CCRA is required, the distributor will include the costs of any transmission work in its own CCA. It is the distributor's responsibility to contract with and pay the transmitter and then recover those costs from the applicant. The OEB does not prescribe specific forms for CCA and CCRA.

Figure 5 outlines the interaction between the applicant, distributor, and host distributor/transmitter when multiple assessments and agreements are involved. The corresponding process steps are provided below the figure.

Distributed Energy Resources Connection Procedures Version 2.0, Figure 5

Figure 5: Connection Cost Agreement Process



[1] If the CCA is not signed within 6 months for small and mid-sized generation facilities and 9 months or 17 months for large generation facilities, the capacity allocation will be removed and the CIA will become invalid. The applicant may need to complete a CCA application form.

Step 1	The applicant notifies the distributor that it wishes to proceed with the CCA process. To ensure the capacity allocation is not lost and the CIA remains valid, the applicant should initiate the CCA process promptly. This allows sufficient time for all parties to prepare and sign the CCA before the prescribed deadlines. The CCA must be signed within: - 6 months for small and mid-sized generation facilities - 9 months for large generation facilities if a transmission system impact assessment is required; or - 17 months for large generation facilities if transmission upgrades are required. from the date the applicant receives the technical requirements for the connection under the CIA process.
Step 2	The distributor determines whether an upstream CCA from a host distributor or a CCRA from a transmitter is needed. If an upstream cost agreement is needed, proceed to step 3. If not, proceed to step 5.
Step 3	The distributor submits an upstream CCA/CCRA application to host distributor/transmitter and coordinates the effort and timeline to ensure the CIA does not expire before the applicant has adequate time to review and sign the CCA.
Step 4	The host distributor/transmitter prepares and issues an upstream CCA/CCRA. Host distributor and transmitter (if applicable) have up to 45 days in total to complete this step.
Step 5	The distributor reviews the upstream CCA/CCRA, finalizes and issues a complete CCA to the applicant.
Step 6	The applicant reviews the complete CCA and seeks clarification from the distributor if required.
Step 7	The applicant decides whether to sign the CCA. If yes, proceed to step 8. If no, proceed to step 14.
Step 8	The applicant signs and submits the CCA and pays the estimated connection cost to the distributor.
Step 9	The distributor acknowledges receipt of the CCA and sends the executed CCA to the applicant.
Step 10	If an upstream CCA/CCRA is required, the distributor proceeds to

	step 11. If not, proceed to step 13.
Step 11	The distributor signs upstream CCA/CCRA and issues required payment to the host distributor/transmitter.
Step 12	The host distributor/transmitter signs the upstream CCA/CCRA and sends the executed upstream CCA/CCRA to the distributor.
Step 13	Proceed to the build and energization stage.
Step 14	The applicant notifies the distributor of the decision not to proceed with the CCA.
Step 15	Upon receiving confirmation that the applicant is no longer proceeding with the CCA, the distributor will release the capacity previously allocated to the project and notify the host distributor/transmitter.
Step 16	The project ends.

6.2 Connection Cost Responsibility (CCR)

Connection cost responsibility is outlined in Chapter 3 and Appendix B of the DSC. The distributor shall clearly outline the connection cost responsibility in the CCA.

7. Build and Energization

Once the CCA is executed, the distributor assigns a project manager and arranges for a kick-off meeting with the applicant within 45 days. The applicant is responsible for providing any required information or documents to support the distributor's engineering design review. This review shall be completed within 1 month after the distributor receives all the required information / documents. The applicant may only begin construction as agreed upon by the distributor. The Build and Energization process flowchart begins with the assignment of the distributor project manager at the conclusion of the CCA phase. The process flowchart is outlined in Figure 6: Build and Energization Process. The corresponding process steps for the distributor, host distributor, transmitter and applicant are detailed thereafter.

7.1 Overall Build and Energization Process

(Distributed Energy Resources Connection Procedures Version 2.0, Figure 6)

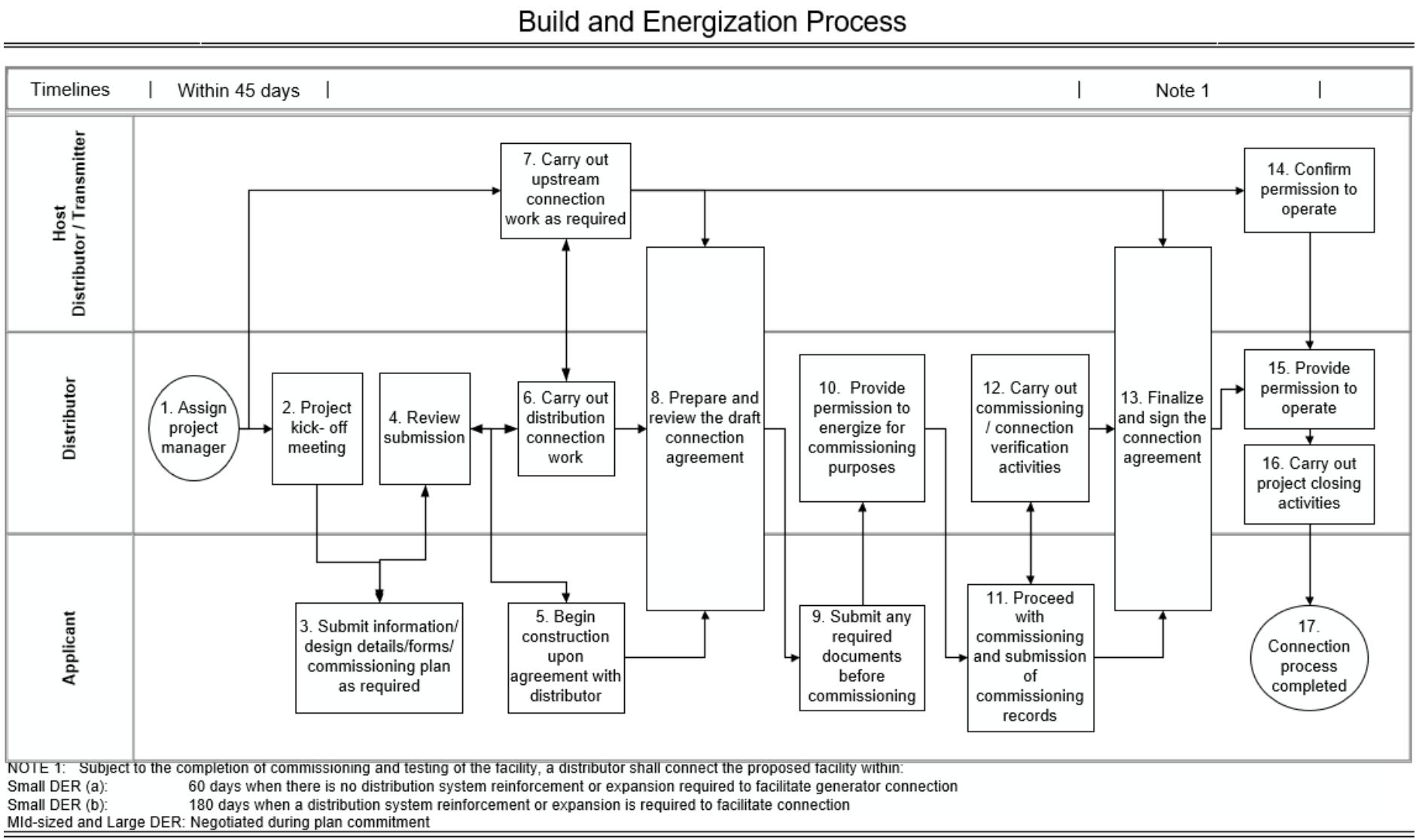


Figure 6: Build and Energization Process

Step 1	The distributor assigns a project manager who will coordinate connection work with the applicant. If upstream connection work is required, the distributor's project manager will coordinate connection work with the host distributor/transmitter.
Step 2	The distributor's project manager will complete a project kick-off meeting with all parties involved to discuss facility design, single line diagram, protections and controls, cost estimates, commissioning requirements and the project schedule including target in-service date.
Step 3	The applicant shall, at the distributor's request, submit construction documents, including but not limited to the following: (a) Project details including single line diagrams (SLDs), proposed project schedule, and targeted in-service date. The targeted in-service date must be no later than five (5) years for waterpower projects or three (3) years for all other types of projects from the initial date of connection application, or in accordance with the timelines in an executed IESO contract. (b) Commissioning plan (c) Summary of testing results, including any certificates of inspection or other applicable authorizations or approvals certifying that any of the applicant's new, modified or replacement facilities have passed the relevant tests and comply with all applicable instruments and standards.
Step 4	Once the applicant receives any applicable permits and upon agreement with the distributor, the applicant begins construction.
Step 5	Once the applicant receives any applicable permits and upon agreement with the distributor, the applicant begins construction.
Step 6	The distributor carries out any connection work required and coordinates with the host distributor/transmitter if upstream work is required. The distributor proceeds to step 18
Step 7	The host distributor/transmitter carries out any upstream connection work (if required).
Step 8	The distributor prepares and discusses the draft connection agreement with the applicant. The applicant reviews the terms and conditions in the draft connection agreement and discusses any

	necessary changes with the distributor. If required, the distributor will work with the host distributor/transmitter to prepare the upstream connection agreement between the distributor and the host distributor/transmitter.
Step 9	The applicant submits any required documents for facility energization/commissioning, including the commissioning plan, to the distributor.
Step 10	The distributor reviews the documents required for commissioning, and upon approval, provides the applicant permission to energize for commissioning purposes.
Step 11	The applicant proceeds with commissioning of the DER. Upon completion, the applicant submits the commissioning records to the distributor.
Step 12	The distributor carries out commissioning/connection verification activities.
Step 13	The distributor coordinates with the applicant and finalizes any operating parameters and the connection agreement. Both the distributor and the applicant will then sign the agreement. If required, the distributor will work with the host distributor/transmitter to finalize and sign the upstream connection agreement between the distributor and the host distributor/transmitter.
Step 14	If necessary, the distributor coordinates with the host distributor/transmitter to confirm the permission to operate required for step 15.
Step 15	Upon confirming that the applicant has received all applicable permits, the distributor provides the applicant with permission to operate when all connection work items have been completed, and all connection requirements have been satisfied. The distributor proceeds to step 16. If the applicant has not completed its portion of connection work items or executed all planned commissioning and verification activities, but the DER facility can operate without adversely affecting the reliability and safety of the distribution system, the distributor may grant permission to operate. When doing so, the distributor shall provide the applicant with a list of the incomplete tasks. The distributor and the applicant must agree

	on the terms and conditions for completing these tasks, including a timeline. During this agreed period, the applicant is responsible for finalizing the remaining tasks.
Step 16	The distributor carries out project closing activities as described under section 7.4.
Step 17	The connection process completed.

7.2 Commissioning

A distributor shall establish and maintain clear commissioning requirements and processes that are proportionate with the risks associated with projects of different sizes and characteristics. The distributor shall post general commissioning requirements and processes electronically on the distributor's website. Subject to safety and reliability requirements, the distributor shall make the best efforts to minimize commissioning costs for applicants, such as only carrying out field visits when needed.

When a distributor requires an applicant of a proposed DER facility to comply with a specific commissioning standard or technical document, the distributor shall periodically review the document to implement newer versions if available or to assess its continued applicability.

7.2.1 Simplified commissioning and verification

A distributor shall offer a simplified commissioning and verification process to small DERs that meet the distributor-specific criteria, such as, but not limited to, a nameplate rated capacity threshold. The simplified process is expected to reduce connection costs and timelines for a subset of small DERs.

When a distributor requires an applicant of a DER facility that meets the criteria for a simplified process to perform any commissioning and verification tasks, the distributor shall provide the applicant with a simplified commissioning and verification form. This form must be based on the simplified template in Appendix F and adhere to the requirements and expectations outlined therein.

7.3 Connection Agreement

A Connection Agreement between a distributor and an applicant outlines specific terms and conditions governing the connection to the distributor's distribution system. Appendix E of the DSC provides forms of connection agreements for micro, small, and mid-size generation facilities.

Table 2: Other Potential Agreements

Agreement Name	Parties	Purpose
Construction Agreement (e.g. Connection Cost Agreement)	Distributor, Generator	Describes obligations of the distributor and the generator to complete connection, including terms of cost recovery.
Construction Agreement (e.g. Connection Cost Recovery Agreement)	Distributor, Transmitter)	As specified in the Transmission System Code In the event a transmission system requires modifications to connect the generator, this document describes the obligations of the distributor and the transmitter to complete the connection, including terms of cost recovery.
Conditions of Service	Distributor, Generator	If the generator is also a load customer of the distributor, this document describes terms and applicable rates.
Additional Operations Agreement (if required)[3]	Distributor, Generator	Within limits of permission under of the DSC Modifications as necessary to existing Connection Agreement to include provisions for safe and effective operation in presence of the generator on the distribution system.

When a distributor and an applicant enter a flexible hosting capacity arrangement, the distributor shall clearly outline in Schedule D of the connection agreement set out in Appendix E of the DSC for that size of generation facility all system conditions, operating requirements and/or contractual terms that will require the output or operation of the generation facility to be varied.

7.4 Project Completion

The distributor provides a connection cost report or connection cost true-up and processes potential deposit refund as described under the DSC section 6.2.18F.

The distributor will also carry out a review to ensure all connection work items and requirements have been completed and close the project accordingly.

[3] Additional Operations Agreement(s) or Construction Agreement(s) may be required where other parties are affected by generation connection, e.g.: distributors.

If the distributor provides permission to operate when the applicant has not completed its portion of connection work items or executed all planned commissioning and verification activities and the applicant does not meet the terms and conditions agreed to under the process step 15 of Figure 6, the distributor may revoke the permission to operate until the applicant fulfils the agreement.

Once the connection process is complete, the applicant operates and maintains the proposed DER.

8. Glossary

Point of Common Coupling (PCC)

The point where the distributor's distribution system ends, and the new DER's connection assets or the existing load customer's connection assets begin. This is equivalent to the DSC definition for Point of Supply. The PCC is shown in Figure 7: PCC vs PODC (Without Distributor-Owned Line Expansion) and Figure 8: PCC vs PODC (With New Distributor-Owned Line Expansion), in relation to assets owned by the distributor (Local Distribution Company, LDC) and the customer.

Point of DER Connection (PODC)

The point where the DER connects with the DER's connection assets as outlined in Figure 7 and Figure 8.

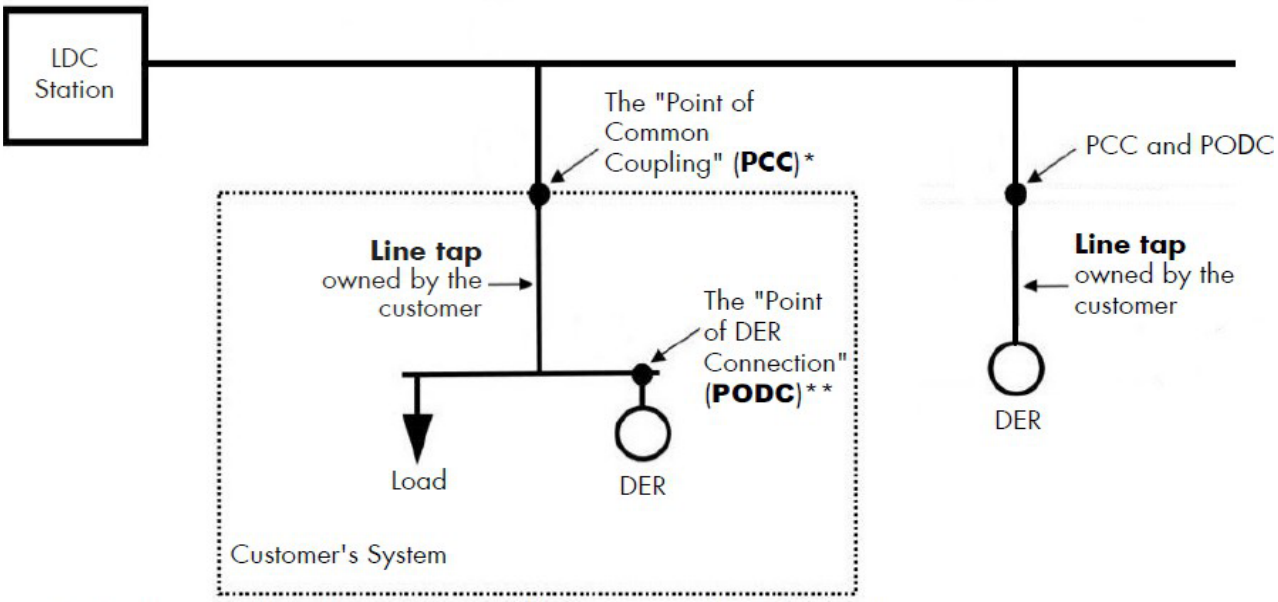


Figure 7: PCC vs PODC (Without Distributor-Owned Line Expansion)

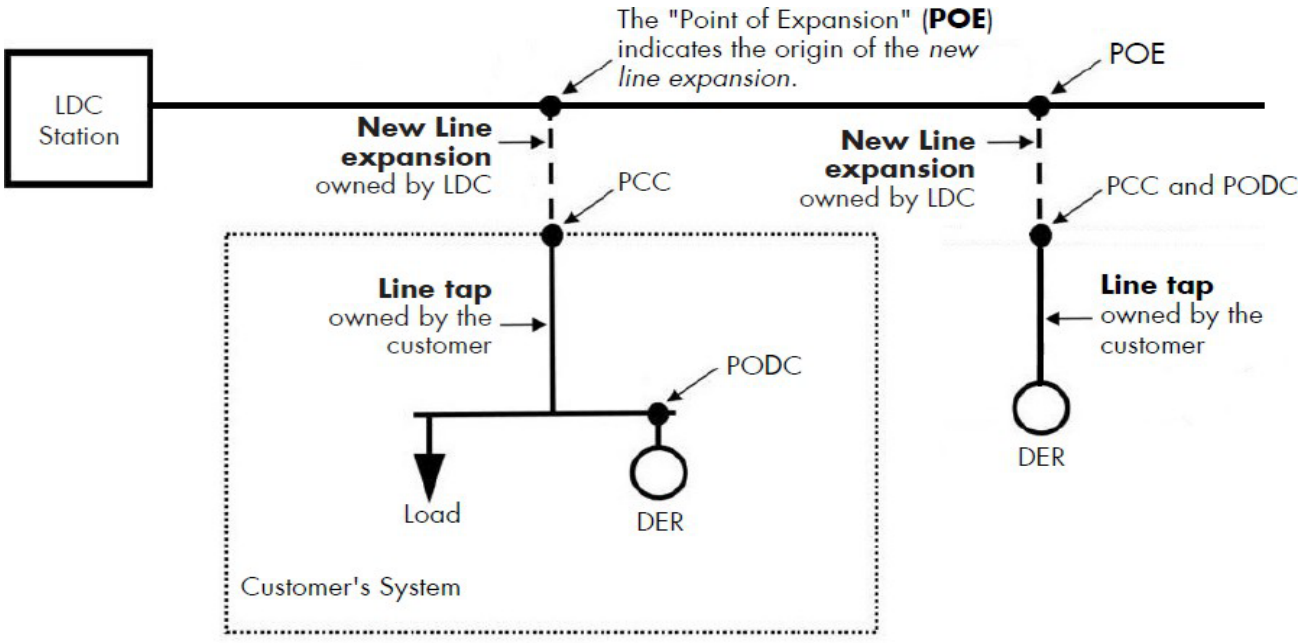


Figure 8: PCC vs PODC (With New Distributor-Owned Line Expansion)