

# Outage Management Redesign (SE-109) Revised Redesign Proposal Changes



At the June 20 meeting, stakeholders were asked to provide feedback on a revised proposal of the Outage Management Redesign. This paper provides a summary of stakeholder feedback received the IESO response to that feedback and changes made to redesigned process. This information will be presented and discussed at the August 7 stakeholder meeting. For more information visit the SE-109 stakeholder engagement web page at: ([http://ieso.ca/imoweb/consult/consult\\_se109.asp](http://ieso.ca/imoweb/consult/consult_se109.asp)).

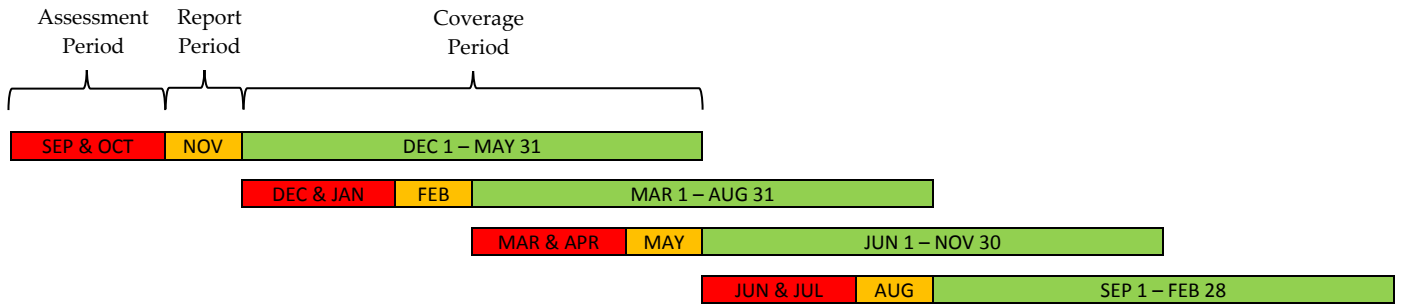
As a result of feedback received, the following changes have been incorporated into the redesign proposal:

- Submission of cancellation costs by the submission deadlines of the process will not be required for the purposes of becoming eligible for compensation.
- Only mid-term advance approval of outages starting within the first 3 months of the coverage period will be eligible for compensation in the event of a revocation. Outages that are advance approved and starting within the last three months of the coverage period will not be eligible for compensation as those outages will be subject to IESO rescheduling and potential at-risk declaration under the rules of the mid-term quarterly process in the next mid-term quarterly cycle. This approach aligns with the goal of trying to resolve conflicts and make outage plans fit within the mid-term process.

Aside from the details regarding compensation, the IESO considers that stakeholders approve all other aspects of the re-designed process. The IESO will use the approved details of the process redesign to assist and proceed with software solution design and preliminary market rule and market manual development. It should be noted that although the process is considered approved for the next phase of the redesigned initiative, it is subject to change based on further discussions and developments within SE-109.

The compensation changes above have been incorporated into the revised design proposal on the following pages as redlined items.

## MID-TERM QUARTERLY PROCESS



### Submission

- The mid-term process is voluntary. The mid-term does not preclude outages from being submitted in the near-term processes.
- All outages that span  $\geq 3$  days and scheduled to start within the coverage period will be assessed as long as they are submitted by the start of the assessment period.
- Outages that span  $< 3$  days in duration must be flagged for assessment by the start of the assessment period and will only be assessed on a best effort basis in the order of time-stamp precedence.
- With overlapping coverage periods, participants have 2 opportunities to submit outages within a 3 month portion of the same coverage period.

### IESO Assessment

- Participants are made aware of impactful outages occurring in the coverage period (subject to confidentiality restrictions). Provides an opportunity to address potential issues/conflicts.
- All Outages included in the mid-term process are locked during the assessment period.
  - Participants cannot make changes to the outage unless:
    - the IESO makes a recommendation to do so; or
    - they cancel the outage
  - The lock is lifted after EOB on the last day of the assessment period.
- By the end of the assessment period, the IESO shall either:
  - Provide *Advance Approval* (outages receive highest time stamp precedence)
    - Any subsequent changes to the outage other than shortening the duration within the original outage window will reset time-stamp precedence and remove *Advance Approval*.
    - *Advance Approval given to generator, distributor or wholesales customer outages starting within the first 3 months of the coverage period are eligible for compensation in the event of subsequent revocation.*
  - Flag as *At Risk* (outage retains original time stamp precedence)
    - Participants may choose to keep the outage as planned; or
    - Reschedule the outage
      - If the outage is rescheduled beyond the first 3 months of the coverage period and done so prior to the assessment period for the next mid-term cycle, the outage will retain its original time stamp precedence.

### Reporting

- Security & Adequacy report(s) for the coverage period are published at the beginning of the report period. The report can be used to guide scheduling decisions for the upcoming near-term process and the next cycle of the mid-term process)

## NEAR-TERM WEEKLY PROCESS

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ASSESSMENT PERIOD						
← COVERAGE PERIOD						
→						

### Submission

- The Near-Term Weekly Process is mandatory for *Critical* outages and outages assessed in the mid-term process. It is voluntary for all *Non-Critical* outages.
- Planned outages must be submitted by EOB on the 3<sup>rd</sup> Friday (1) prior to the coverage period in which they are scheduled to start.
  - Participants must make a separate request for the IESO to include any *Non-Critical* outages by the near-term weekly submission deadline.
    - Once the near-term weekly submission deadline passes, *Non-Critical* outages cannot be rescheduled to start within the near-term daily process until the coverage period passes, unless they are re-submitted as *Opportunity*, *Urgent* or *Forced* outages.
  - Late submissions for planned *Critical* outages must wait until the next near-term weekly cycle to be considered for *Advance Approval* unless they are submitted as *Opportunity*, *Urgent* or *Forced*.
- ~~If eligible, compensation costs for any outage submitted into the near term weekly process must be provided by the submission deadline in order to be considered for a compensation claim in the event of revocation or recall.~~

### IESO Assessment

- All outages are locked during the assessment period.
  - Participants cannot make changes to the outage unless:
    - the IESO makes a recommendation to do so; or
    - they re-submit as an *Opportunity*, *Urgent* or *Forced* outage; or
    - they *Cancel* the outage
  - The lock is lifted after EOB on the last day of the assessment period.
- By EOB on the 2<sup>nd</sup> Friday prior to the coverage period, the IESO shall either:
  - Provide *Advance Approval* (outages receive higher time stamp precedence than those within the near-term daily process)
    - *Advance Approval* given to generator, distributor or wholesales customer outages within the near-term weekly process are eligible for compensation in the event of subsequent revocation or recall.
  - Reject (participants can either cancel or reschedule the outage)
    - May be identified at any time during the assessment period.
    - Outages must be rescheduled within 5 business days in order to preserve timestamp
    - Rejected outages can only be rescheduled once for the purpose of timestamp retention.
  - Revoke mid-term *Advance Approval* (participants can either cancel or reschedule the outage)
    - May be identified at any time during the assessment period.
    - Outages must be rescheduled within 5 business days in order to preserve timestamp

### Reporting

- Format and publication as per the existing SSR & SAA reporting process

## NEAR-TERM DAILY PROCESS



### Submission Requirements

- The Near-Term Daily process is mandatory for all *Non-Critical*, *Opportunity* and *Pre-approved* planned outages
- *Non-Critical* and *Opportunity* outages must be submitted by EOB on the 5th business day prior to the day it is scheduled to start
  - Late submissions will not be accepted unless they are submitted as *Forced* or *Urgent* outages.
  - *Opportunity* outages must be justified and are subject to IESO discretion based on whether a change in system conditions afforded the opportunity with little to no impact on reliability and IESO assessment effort.
- Pre-approved outages must be submitted by EOB on the 2nd business day prior to the day it is scheduled to start
  - Late submissions will not be accepted unless they are submitted as *Forced* or *Urgent* outages.
- ~~If eligible, compensation costs for any outage submitted into the near term daily process must be provided by the submission deadline in order to be considered for a compensation claim in the event of revocation or recall.~~

### IESO Assessment

- *Non-Critical* and *Opportunity* outages are locked during the assessment period.
  - Participants cannot make changes to the outage unless:
    - the IESO makes a recommendation to do so; or
    - they re-submit as an *Urgent* or *Forced* outage; or
    - they *Cancel* the outage
- By EOB on the 3rd business day prior to the start of the outage, the IESO shall either:
  - Provide *Advance Approval* (outages receive higher time stamp precedence than those within the near-term daily process)
    - If the system condition that afforded an *Opportunity* outage ceased to exist after the *Urgent* outage received *Advance Approval*, the IESO will perform a reliability assessment to determine whether the *Opportunity* outage may still proceed.
    - *Advance Approval given to generator, distributor or wholesales customer outages within the near-term daily process are eligible for compensation in the event of subsequent revocation or recall.*
  - Reject (participants can either cancel or reschedule the outage)
    - May be identified at any time during the assessment period.
    - Outages must be rescheduled within 5 business days in order to preserve timestamp
    - Rejected outages can only be rescheduled once for the purposes of retaining timestamp

### Reporting

- Format and publication as per the existing SSR & SAA reporting process

### Outage Priority Sequence (across the entire outage management process)

- Forced Outages → Urgent Outages → Mid-Term Advance Approval → Near-Term Weekly Advance Approval → Near-Term Daily Advance Approval / Opportunity Outages / Pre-Approved Outages
- Submission time-stamp is used manage conflict resolution between priority types.