# Ohio Administrative Code

## Rule 4901:1-22-09 Scoping meeting and interconnection studies.

Effective: June 1, 2022

(A) Scoping meeting

(1) A scoping meeting will be held within ten business days after the interconnection application is deemed complete, or as otherwise mutually agreed to by the parties. The EDU and the applicant may bring to the meeting personnel, including system engineers and other resources as may be reasonably required to accomplish the purpose of the meeting.

(2) The purpose of the scoping meeting is to discuss alternative interconnection options, to determine potential points of common coupling, to examine the applicant's proposed generator connection, or to review an applicant's pre-application report or existing studies relevant to the interconnection application. The parties shall further discuss the appropriate interconnection studies required to evaluate the interconnection of the proposed DER to the EDU's system.

(3) The scoping meeting may be waived by mutual agreement if the parties decide to proceed directly to the interconnection studies.

(B) Queuing

(1) When an interconnection request is complete, the EDU shall assign the application a queue position to establish the order in which the interconnection request will be reviewed in relation to other interconnection requests on the same or nearby sections of the EDU's system.

(2) The queue position of an interconnection request shall be used to determine the cost responsibility necessary for the construction of any facilities to accommodate the interconnection in relation to other interconnection requests on the same or nearby sections of the EDU's system.

(3) The EDU shall notify the applicant at the scoping meeting about other higher-queued applicants.

(C) Interconnection study requirements

(1) One or more interconnection studies may be required by the EDU prior to interconnection of a level 3 DER including a feasibility study, a system impact study, and a facilities study.

(2) Each type of study required will include an EDU interconnection tariff fee schedule approved by the commission as set forth in rule 4901:1-22-08 of the Administrative Code.

(3) Each type of study will be the subject of a written study agreement between the applicant and the EDU that includes the following:

(a) A target date for completion of the study.

(b) A provision to share the results of the study by the EDU with the applicant.

(c) A clear explanation of all estimated charges.

(d) A good faith estimate of the total number of hours needed to complete the study.

(e) An estimate of the total interconnection study fee.

(4) A written study agreement may include an alternative provision that allows the required studies related to the interconnection of the DER to be conducted by a qualified third party with the consent of the EDU.

(5) By mutual agreement of the parties, a feasibility study, a system impact study, or a facilities study under level 3 procedures may be waived by the EDU.

(6) When the EDU determines, as a result of the studies conducted under a level 3 review, that it is appropriate to interconnect the DER, the EDU shall provide the applicant with a standard interconnection agreement.

(7) If the interconnection request is denied, the EDU shall provide a written explanation within five

business days from the denial. The EDU must allow the applicant thirty business days to cure the reasons for denial while the applicant's position in the queue is maintained.

(D) The feasibility study

(1) No later than five business days after the scoping meeting, the EDU shall provide the applicant with a feasibility study agreement in accordance with the EDU's tariff to determine the feasibility of interconnecting the applicant's proposed DER at a particular point on the EDU's system. The feasibility study agreement shall include the following:

(a) An outline of the scope of the study.

(b) A non-binding good faith estimate of the cost to perform the study.

(2) A feasibility study shall include the following analyses for the purpose of identifying a potential adverse system impact to the EDU's system that would result from the interconnection:

(a) Initial identification of any circuit breaker short circuit capability limits exceeded as a result of the interconnection.

(b) Initial identification of any thermal overload or voltage limit violations resulting from the interconnection.

(c) Initial review of grounding requirements and system protection.

(d) A description and nonbinding estimated cost of facilities required to interconnect the distributed generation facility to the EDU's system in a safe and reliable manner.

(3) When an applicant requests that the feasibility study evaluate multiple potential points of interconnection, additional evaluations may be required.

(4) The actual cost of the EDU's additional evaluations shall be paid by the applicant.

(E) The system impact study

(1) No later than five business days after the completion of or a waiver of the feasibility study, the EDU shall provide a distribution system impact study agreement to the applicant, using a form of system impact study agreement in accordance with the EDU's tariff that includes an outline of the scope of the study and a nonbinding good faith estimate of the cost to perform the study.

(2) If the feasibility study concludes there is no adverse system impact, or the study identifies an adverse system impact but the EDU is able to identify a remedy, no system impact study is required.

(3) A system impact study shall evaluate the impact of the proposed interconnection on the safety and reliability of the EDU's system. The study shall:

(a) Identify and detail the system impacts that result when a DER is interconnected without project or system modifications.

(b) Consider the adverse system impacts identified in the feasibility study, or potential impacts including those identified in the scoping meeting.

(c) Consider all DERs that, on the date the system impact study is commenced, are directly interconnected with the EDU's system.

(d) Consider the impact of pending higher-queued interconnection applications to the system as well as the position of facilities having a signed interconnection agreement that are not yet online.

(4) A system impact study performed by the EDU shall consider the following criteria:

(a) A load flow study.

(b) A short circuit analysis.

(c) A stability analysis.

(d) Voltage drop and flicker studies.

(e) Protection and set point coordination studies.

(f) Grounding reviews.

(5) The EDU shall state the underlying assumptions of the study and show the results of the analyses to the applicant, including the following:

(a) Any potential impediments to providing the requested interconnection service.

(b) Any required distribution system upgrades and a nonbinding good faith estimate of cost and time to construct the system upgrades.

(F) The facilities study

(1) Within five business days of completion of the system impact study, a report will be transmitted by the EDU to the applicant with a facilities study agreement in accordance with the EDU's interconnection tariff.

(2) If the parties agree at the scoping meeting that no system impact study is required, the EDU shall provide to the applicant, no later than five business days after the scoping meeting, a facilities study agreement in accordance with the EDU's interconnection tariff that enables the EDU to determine the interconnection facilities needed to interconnect the applicant's proposed DER at a particular point on the EDU's system.

(3) The facilities study agreement shall include both of the following:

(a) An outline of the scope of the study.

(b) A nonbinding good faith estimate of the cost to perform the facilities study to cover the cost of the equipment, engineering, procurement and construction work, including overheads, needed to implement the conclusions of the feasibility study and/or the system impact study to interconnect the

DER.

(4) The facilities study shall identify all of the following:

(a) The electrical switching configuration of the equipment, including transformer, switchgear, meters, and other station equipment.

(b) The nature and estimated cost of the EDU's interconnection facilities and distribution upgrades necessary to accomplish the interconnection.

(c) An estimate of the time required to complete the construction and installation of such facilities.

(5) The parties may agree to permit an applicant to separately arrange for a third party to design and construct the required interconnection facilities under the following conditions:

(a) The EDU may review the facilities to be designed and constructed by a third party under provisions included in the facilities study agreement for that purpose.

(b) The applicant and the third party separately arranging for design and construction agree to comply with security and confidentiality requirements.

(c) The EDU shall provide the applicant with all relevant information and required specifications, including make and/or model of equipment where necessary, available to permit the applicant to obtain an independent design and cost estimate for the facilities, which must be built in accordance with the specifications.