	© <i>ISO New England Inc. 2024</i>	<b><i>Procedure: Evaluate Resource Outage Requests</i></b>
	<b><i>Process Name: Capture and Evaluate Outage Requests</i></b>	
	<b><i>Procedure Number: OUTSCH.0030.0010</i></b>	<b><i>Revision Number: 21</i></b>
	<b><i>Procedure Owner: Andrew Kopacka</i></b>	<b><i>Effective Date: March 27, 2024</i></b>
	<b><i>Approved By: Director, Operations Support Services</i></b>	<b><i>Valid Through: March 27, 2026</i></b>


# SOP-OUTSCH.0030.0010

## Evaluate Resource Outage Requests

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## 1. Objective

The objective of this procedure is to document the responsibilities of ISO New England (ISO) staff with regard to the evaluation of Planned Outage (PO) and Maintenance Outage (MO) Resource requests that could create constraints upon the Bulk Electric System (BES).


This procedure does **not** in any way change the intent of ISO New England Operating Procedure No. 5 - Resource Maintenance and Outage Scheduling (OP-5) but rather is intended to clarify responsibilities delegated to the ISO staff by OP-5.

Compliance with this procedure is necessary for reliable operation of the power system. This procedure can affect Market operations and Settlements.

## 2. Background

Market Participants (MPs) submit their outage request applications and ISO schedules Resource MOs in accordance with OP-5. The evaluation of an MO request usually takes place well in advance of the Day-Ahead Market and relies upon the most accurate data available at the time of the evaluation. Whenever possible, transmission and Resource outage requests will be coordinated to reduce congestion costs. Depending on system conditions, ISO will attempt to accommodate MOs as soon as possible.

This procedure does **not** pertain to Real-Time Resource Forced Outages (FOs), which are handled as Redeclarations in accordance with CROP.36002 Redeclarations.

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### 3. Responsibilities


#### NOTE

Any North American Electric Reliability Corporation (NERC) Certified System Operator, certified at the Reliability Coordinator (RC) level, has the authority to take action(s) required to comply with NERC Reliability Standards.

1. The Resource Analyst is responsible for performing the applicable actions in this procedure during normal business hours (i.e., non-holiday weekdays 0700 through 1530).
2. The Short-Term Outage Coordinator is responsible for performing the applicable actions of this procedure during the weekend and during holidays from 0700 through 1530.
3. The Forecaster is responsible for performing the applicable actions in this procedure when the Outage Coordinator positions are **not** staffed (i.e., daily from 1530 through 0700).
4. The Outage Coordinator or Forecaster is responsible for evaluating, with the Local Control Center (LCC) staff if necessary, each Resource outage request application submitted by a Market Participant (MP), for the outage impact on future system reliability and congestion.
5. The Generation Operator is responsible for performing Resource outage communications during Real-Time operations.

### 4. Controls

- ISO New England Operating Procedure No. 19 - Transmission Operations (OP-19) criteria are **not** violated as verified by the Reliability and Operations Compliance (ROC) Analyst
- ISO Resource outage request application process occurs in accordance with the times specified in OP-5
- Each evaluated MO is retained in the ISO Outage Scheduling software

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## 5. Instructions


### 5.1 Evaluating a Resource Outage Request Application

1. The Outage Coordinator or Forecaster shall use expected future local area constraints when evaluating a Resource outage.
2. The Outage Coordinator or Forecaster shall approve each Resource outage that has de-listed from supplying capacity above the Generator Capacity Supply Obligation (CSO) into the Forward Capacity Market (FCM).
  - A. If a special study is requested, refer to SOP-OUTSCH.0050.0010 - Determine Study Requirements.
3. The Outage Coordinator or Forecaster shall process each Resource outage on a first-come, first-served basis, while meeting all reliability criteria in OP-5.
4. Upon receipt of detailed information from an LCC or ISO concerning an adverse reliability concern, the Outage Coordinator / Forecaster shall contact both the LCC and Resource Designated Entity (DE) and discuss the proposed outage and its effect on the system and Generator.
  - A. Once the final outage dates and times have been determined and if the transmission maintenance requires a Resource constraint or outage, the Outage Coordinator or Forecaster shall perform the following:

#### NOTE

Unless the outage is caused by a radial line, the Outage Coordinator or Forecaster will only advise the Resource that a transmission constraint is causing a problem without detailing the exact outage.

- (1) Contact the Resource DE and communicate the following:
  - a. Estimated reduction capability
  - b. Estimated times the constraint or outage will be required
- (2) Verify the Resource is explicitly referenced on the “Short Term Study” tab of the “Transmission Outage Requested Form” under the “Generation Must Run” or “Generation Limitation” area of the display in the ISO Outage Scheduling software.
- (3) **No** later than the day prior to the Operating Day, enter any Resource constraint or reduction as “Transmission Constrained Down” or “Must Run” in the ISO Outage Scheduling software.


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5. If the MP takes the Resource out-of-service after being denied an outage, the priority of the outage shall be changed from “Planned Outage” to “Forced Outage”.

**NOTE**

SOP-OUTSCH.0050.0010 - Determine Study Requirements provides guidance on coordinating outages to reduce congestion. Long-Term Outage, Short-Term Outage and Real-Time Studies groups may perform this function through study tools, commitment tools and system expertise.


6. Whenever possible, the Long-Term Outage, Short-Term Outage and Real-Time Studies groups shall coordinate transmission, and Resource outages to reduce congestion costs.

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## 5.2 Denying a Resource Outage Request Application

### 5.2.1 During Normal Conditions

1. The Outage Coordinator or Forecaster working with the Operations Shift Supervisor shall consider the following conditions and determine if a Resource outage request application will be denied:
  - Estimated area protection requirements and/or inter-area transfer capabilities will be violated
  - Estimated OP-5 criteria for Short Term Operable Capacity Margin (STOCM) will be violated at the time of the outage
2. The Outage Coordinator or Forecaster shall **not** deny any fully de-listed Resource outage request application.
3. If transmission or capacity violations occur, the Outage Coordinator or Forecaster working with the Operations Shift Supervisor shall deny a Resource outage request application as follows:
  - A. For a system capacity problem or for specific transmission facility limitations:
    - (1) On a last-in, first-out basis, deny any necessary Resource outage request application that is classified as postponable.
    - (2) On a last-in, first-out basis, deny any other necessary Resource outage request application.
    - (3) On a priority basis, deny any other outage request application for a Resource that is participating in an ISO VAr (Schedule 2) Program (as defined in SOP-RTMKTS.0180.0055 - Process and Perform Reactive Capability Tests) and is needed for voltage support.
  - B. For local area protection requirements:
    - (1) On a last-in, first-out basis, deny any applicable outage request application that is classified as postponable if the Resource is required within the local area.
    - (2) On a last-in, first-out basis, deny any other applicable Resource outage request application if the Resource is required within the local area.
    - (3) On a priority basis, deny any other outage request application for a Resource that is participating in an ISO VAr (Schedule 2) Program and is needed for voltage support.

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4. Whenever significant congestion occurs resulting from a Resource outage request application, the Outage Coordinator or Forecaster shall deny the outage request application and attempt to coordinate transmission and Resource outages to develop alternative outage schedules to minimize potential congestion costs associated with the original outage plans.

**NOTE**

The LCC is responsible for notifying ISO if a Resource outage poses a local system reliability impact within its area. The LCC is required to present detailed supporting information (for example, load flow data) to ISO regarding any local area reliability concerns.

**5.2.2 During Cold Weather Conditions**

1. Whenever cold weather conditions exist as defined in SOP-RTMTKS.0050.0007 - Perform Cold Weather Condition Operations, the Outage Coordinator or Forecaster shall review and either approve or deny each applicable MO.
2. Whenever cold weather conditions exist and an MO request results in the forecast of any actions of ISO New England Operating Procedure No. 4 - Action During a Capacity Deficiency (OP-4) or ISO New England Operating Procedure No. 7 - Action in an Emergency (OP-7), the Forecaster shall cancel or deny the outage if it is scheduled for Real-Time. The Outage Coordinator shall attempt to move the outage to an acceptable period when an adverse reliability condition would **not** be expected to occur.
3. Whenever cold weather conditions exist, the Outage Coordinator or Forecaster shall deny an MO request if the outage would cause a violation of criteria set forth in OP-19.

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### 5.3 Communications


1. The Outage Coordinator or Forecaster shall notify the applicable DE of each approved or denied Resource outage request application as soon as possible.
2. The Outage Coordinator or Forecaster shall notify the applicable LCC via the ISO Outage Scheduling software, when a Resource outage request application is approved/denied in the respective LCC's local area.
3. If, at the request of ISO, a Resource outage is moved outside of its originally scheduled times, the Outage Coordinator shall send an e-mail to the Resource Analyst responsible for maintaining the Annual Maintenance Schedule (AMS) directing the Resource Analyst to inform Settlements of the condition.

#### NOTE

The objective of a weekly Northeast Power Coordinating Council, Inc. (NPCC) teleconference is to gain an understanding of any upcoming events (weather, Resource and transmission outages, etc.) that could affect another Reliability Coordinator Area (RCA) within the next 10 days. Among the entities participating with ISO in this weekly call are Independent Electricity System Operator (IESO), New Brunswick Power System Operator (NBP-SO), Hydro-Québec TransÉnergie (HQTÉ), New York Independent System Operator (NYISO), Pennsylvania-New Jersey-Maryland Interconnection (PJM), and NPCC representatives.

4. The Outage Coordinator shall participate in planning meetings with neighboring RCAs via a weekly NPCC teleconference.



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## 6. Performance Measures

This procedure is deemed to be properly followed as evidenced by the following:

- Corporate Goal for NERC Standards Compliance Metric for NPCC Criteria Compliance and Enforcement Program (CCEP)
  - Achieve NERC Reliability Standards and self-report any noncompliance
    - No IROL violations
    - No findings of high or severe audit violations

## 7. References

Northeast Power Coordinating Council Inc. (NPCC) Criteria Compliance and Enforcement Program (CCEP)

ISO New England Operating Procedure No. 4 - Action During a Capacity Deficiency (OP-4)

ISO New England Operating Procedure No. 5 - Resource Maintenance and Outage Scheduling (OP-5)

ISO New England Operating Procedure No. 7 - Action in an Emergency (OP-7)


ISO New England Operating Procedure No. 19 - Transmission Operations (OP-19)

SOP-OUTSCH.0050.0010 - Determine Study Requirements

SOP-RTMTKS.0050.0007 - Perform Cold Weather Condition Operations

SOP - RTMKTS.0180.0055 - Process and Perform Reactive Capability Tests

CROP.36002 Redclarations

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## 8. Revision History

Rev. No.	Date	Reason	Contact
---		For previous revision history, refer to Rev 20 available through Ask ISO	JD Dawson
21	3/27/24	Biennial review including minor editorial changes; Updated procedure owner; Removed STO from Section as this is defined as an MO in OP5; Removed Short Term throughout to align with current restructure of groups; Globally changed “Generation Coordinator” to “Resource Analyst”.	Andrew Kopacka

## 9. Attachments

None.