

## Seeking Transmission Plan Deliverability Affidavit Instructions

Eligibility to seek Transmission Plan Deliverability in the 2025 Transmission Plan Deliverability allocation cycle.

Eligibility to seek TP Deliverability in the 2025 cycle							
	C13 & Prior			C14			Fast Track
Allocation Group	FCDS	PCDS seeking for EO portion	EO	FCDS Allocated TPD in 2024	PCDS/FCDS seeking for FCDS portion w/o TPD allocation	EO	
A PPA	N/A - FCDS	yes	yes	N/A - FCDS	yes	yes	no
B Short List	N/A - FCDS	yes	yes	Yes, if unable to retain in 2025	yes	yes	no
C Commercial	N/A - FCDS	yes	yes	N/A - FCDS	yes	yes	no
D	N/A - FCDS	no	no	Yes, if unable to retain in 2025	yes	no	no

### When is the \$5,000 fee required?

CAISO Customers

	C13 & Prior			C14			
Allocation Group	FCDS	PCDS seeking for EO portion	EO	FCDS parked all MW in 2024	PCDS seeking for parked portion	PCDS seeking for EO portion (no portion parked)	EO
\$5K	N/A - FCDS	yes	yes	no	no	yes	yes

Wholesale distribution access customers

Work with your utility for the study amount and fund submittal process.

For SCE see Attachment A

### Submitting the Study Funds

To CAISO

Beneficiary Bank Name: Wells Fargo Bank, N.A.  
Beneficiary Bank Address: 420 Montgomery Street  
San Francisco, CA 94104  
LGIP/SGIP Deposits  
Wells Fargo Bank, N.A.  
ABA# 121000248  
Account# 4122041825  
Account Name: CAISO LGIP

The description field on the wire must include: the Project Name, the Queue Number, and “Intra-Cluster Deposit.”

The CAISO will only accept one wire per project.

### To the Utility

Please work with your utility for the study amount and money submittal process

### Contacts

Pacific Gas & Electric - [WDT\\_Deliverability@pge.com](mailto:WDT_Deliverability@pge.com)

San Diego Gas & Electric - [GIA-](#)

[Transmission@sdge.com](mailto:Transmission@sdge.com) and [GIEngineers@sdge.com](mailto:GIEngineers@sdge.com)

Southern California Edison - [Grid.Interconnections@sce.com](mailto:Grid.Interconnections@sce.com)

Please see Attachment A for additional instructions

Valley Electric Association - Darell Holmes, (775) 727-2736, [DHolmes@VEA.coop](mailto:DHolmes@VEA.coop)

## Instructions for specific line items

TP Deliverability Cycle: prepopulated, no changes permitted.

CAISO Queue Position (numeric only) OR WDAT Identifier (e.g. “1234W”, “WDAT1234” or “WDT1234”):

- 1) CAISO interconnecting projects, enter the queue position numbers only do not include “C” or “QC”
- 2) Distribution interconnection projects enter the alpha numeric identifier given to the project by the utility e.g. W#####, WDAT#####, WDT#####

Project Name: enter the name of the project as reflected by the CAISO or utility.

Participating TO/UDC (for WDAT): choose the name of the PTO or utility that owns the electric system the project is interconnecting to, from the dropdown list.

Current Project Level Deliverability Status: considering the entire project, choose the current deliverability status from the dropdown list.

#### For WDAT Only

Cluster #: enter the cluster number assigned by the utility for interconnection studies.

Leave blank if there is no cluster.

MW at POI: enter the interconnection service capacity requested for study.

#### Affidavit Contact Information

Contact Name: enter the name of the person most familiar with the entries on this affidavit.

Title: enter the title of the person named above

Email: enter the email address of the person named above

Phone: enter a phone number the CAISO could call to reach this person directly

The allocation groups and points the CAISO substantiates with the submitted documentation will be used for TPD allocation priority ranking in the 2025 TPD allocation study.

For each quantity of MW seeking a TP Deliverability allocation complete the details in the box. First for the first, Second for the second, etc. If you are using more than one power purchase agreement to substantiate a seeking request, enter date for each PPA in the field. Use the same entry order for all entries. Details from the first PPA should always appear first, details from the second PPA should always appear second in the entry field etc.

#### Seeking Request

Enter information corresponding to the MW seeking the TPS allocation.

Additional MW from the same project will be entered into the Second Seeking Request, Third Seeking Request etc.

Gen Type: choose the generation type of the MW seeking the TPD allocation from the dropdown list.

**Fuel Type:** choose the fuel type of the MW seeking the TPD allocation from the dropdown.

**MW:** enter the quantity of MW seeking the TPD allocation

**Allocation Group:** choose the allocation group under which the MW are seeking the TPD allocation.

**Capacity added through MMA:**

1) choose yes if the MW seeking the TPD allocation was added to the original project as reflected in its original interconnection request through an MMA

2) choose no if the MW seeking the TPD allocation does not meet 1) above

**CAISO Resource ID:** enter the Resource ID(s) registered with the CAISO. If the project does not have a Resource ID do not enter anything into the field

#### Point Selection

**Permitting:** choose the points for which the MW seeking the TPD allocation is qualified from the dropdown list

**Shortlist:** choose the points for which the MW seeking the TPD allocation is qualified from the dropdown list

**PPA:** choose the points for which the MW seeking the TPD allocation is qualified from the dropdown list.

**Land:** choose the points for which the MW seeking the TPD allocation is qualified from the dropdown list

<b>Points</b>	<b>Permitting</b>	<b>Power Purchase Agreement Status (Group A)</b>	<b>Shortlist Status (Group B)</b>	<b>Land Acquisition</b>
10	Has Final government permit to construct			
7				Site Control - Legal right to construct 100% of project
5	Draft Environmental Report w/no significant impact that cannot be mitigated	Has regulator-approved power purchase agreement		

3	Data adequate	IC is a Load Serving Entity constructing its project to serve its own Load pursuant to a regulatory requirement	IC is actively <sup>1</sup> negotiating a power purchase agreement	Site Exclusivity
1	Applied			
0 (Min. Req.)		Has executed power purchase agreement w/o regulatory approval	No power purchase agreement, included in shortlist	

### Power Purchase Agreement Information

Enter data here only if seeking under allocation groups A or B

All entries apply only to the corresponding seeking request.

LSE: choose the load serving entity name from the dropdown list. If the counterparty is not an LSE or the name does not appear, do not make a selection.

IC Serving Own Load:

- 1) if the interconnection customer is also the LSE and is serving its own load, choose yes
- 2) if 1) above is not met, choose no

Counterparty: enter the name of the counterparty (buyer)

Contact Name: enter the name of the person at the counterparty who will be familiar with the MW that are seeking TPD. Meaning, the person who is familiar with your offer.

Contact Email: enter the email address of the person above. If multiple emails, separate by a semicolon. Email addresses only (i.e. j.smith@abcd.com;j.jones@xyz.com)

Contact Phone: enter the phone number the CAISO can call to reach this person directly.

Term in Years: enter the term of the power purchase agreement or the term of the request for information or offer e.g. 1 year, 6 years, 2.75 years.

Term Pg & Para: enter the page and paragraph on the page where the term of the power purchase agreement is stated. This reference could also be to a term sheet. Consider each segment of text separated by a blank line, a paragraph.

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<sup>1</sup> For purposes of TPD documentation evaluation, "active" means within the past three months i.e. May, June, July

**Delivery Date:** enter the date the counterparty (buyer) expects the project to deliver the product.

**Delivery Data Pg & Para:** enter the page and paragraph on the page where the delivery date of the product purchased is stated. This reference could also be to a term sheet. When counting paragraphs, consider each segment of text separated by a blank line, a paragraph.

**Deliverability Status/RA Pg & Para:** enter the page and paragraph on the page where the product purchased includes some form of 1) resource adequacy 2) qualifying capacity or 3) deliverability is stated. This reference could also be to a term sheet. Consider each segment of text separated by a blank line, a paragraph.

**Procured Fuel Type/Capacity Pg & Para:** enter the page and paragraph on the page where the fuel type and capacity of the product purchased is stated. This reference could also be to a term sheet. Consider each segment of text separated by a blank line, a paragraph.

**Notes/Comments:** Enter any clarifying information here. If a choice you wanted to make was not in the dropdown list, describe it here. If the form prevented you from accurately entering information, describe it here. If there is anything the CAISO should know about our seeking request, enter it here.

#### Authorized Representative

The CAISO is accepting only one authorized representative from the interconnection customer of record with the CAISO or utility. If applicable, select one person among the affiliates.

**First Name:** enter the first name of authorized representative.

**Last Name:** enter the last name of authorized representative.

**Title:** enter the title of authorized representative

**Legal Name of Interconnection Customer:** prepopulated – no changes permitted.

**Name of Parent Company:** prepopulated – no changes permitted.

**Date:** enter the date the affidavit was completed

The affidavit does not need to be notarized.

### **Returning the completed affidavit**

Both CAISO and distribution interconnecting projects will send an email adhering to the naming conventions below to the CAISO at [IRInfo@caiso.com](mailto:IRInfo@caiso.com) before 5:00pm PPT August 29, 2025. No affidavits will go directly to the utility; please copy the utility for awareness. The email must include:

1. The complete Seeking Transmission Plan Deliverability Affidavit
2. Documentation to substantiate allocation group and point claims.
  - a. Zip documents if the attachments are too large.
  - b. If the attachments are still too large, send an email to [IRInfo@caiso.com](mailto:IRInfo@caiso.com) requesting a CAISO Kiteworks folder be set up. In that request, state the names and email addresses of any persons who should have access representing the TPD requestor.

### **Email and File Naming Conventions**

Submissions that do not adhere to the below will not be accepted.

Email subject line convention: **Cluster Queue# ProjectName** 2025 Seeking TPD Affidavit

Example: **C14 Q1234 CAISO Wind** 2025 Seeking TPD Affidavit

**Affidavit filename convention: The affidavit must be in its original Word Format. PDFs of the affidavit will not be accepted.** **Cluster Queue# ProjectName Seeking TPD Affidavit.docx**

Filename convention for substantiating documentation: **Cluster Queue# ProjectName DocumentName**

If submitting more than one file in a category add sequential numbers to the end of the filename.

Example: **C14 Q1234 CAISO Wind Permit Final1**

**C14 Q1234 CAISO Wind Permit Final2**

Filename Conventions	
<b>SEEKING TPD AFFIDAVIT</b>	
Seeking TPD Affidavit	<b>C14 Q1234 CAISO Wind Seeking TPD Affidavit</b>
<b>PERMITTING STATUS</b>	
Final Permit to Construct or authorization to construct with exemption	<b>C14 Q1234 CAISO Wind Permit Final</b>

Draft Environmental Report	<b>C14 Q1234 CAISO Wind Environmental Report</b>
Data adequate	<b>C14 Q1234 CAISO Wind Data Adequate</b>
Applied	<b>C14 Q1234 CAISO Wind Permit App</b>
<b>POWER PURCHASE AGREEMENT STATUS</b>	
Regulator Approval	<b>C14 Q1234 CAISO Wind Regulator</b>
Executed PPA	<b>C14 Q1234 CAISO Wind PPA</b>
<b>SHORTLIST STATUS</b>	
PPA Negotiation	<b>C14 Q1234 CAISO Wind Neg</b>
Shortlist	<b>C14 Q1234 CAISO Wind Short</b>
<b>LAND ACQUISITION</b>	
Site Control	<b>C14 Q1234 CAISO Wind Control</b>
Site Exclusivity	<b>C14 Q1234 CAISO Wind Exclusivity</b>

<b>Acceptable Documents and Document Requirements</b>	
<b>POWER PURCHASE AGREEMENT</b>	
Copy of the PPA – financial terms may be redacted <sup>2</sup>	
Copy of the Term Sheet – financial terms may be redacted	
<b>SHORTLIST STATUS</b>	
Emails dated May, June or July August 2025 to be considered active 1) exchanging drafts from seller and buyer of the PPA or 2) emails from seller and buyer showing exchange of terms or conditions including drafts of a Term Sheet	
Confirmation email/statement/letter from the buyer that the project is on a shortlist	

<sup>2</sup> Information that substantiates a claim may not be redacted.

<b>PERMITTING</b>
Copy of final permit to construct or confirmation email/statement/letter from the governmental entity
Copy of draft environmental report
Confirmation email/statement/letter from the permit grantor that the application is data adequate
Copy of the submitted permit application
<b>LAND ACQUISITION</b>
Copy of executed deed/lease/option agreement or other similar document showing rights to construct a generating facility on the land

#### Resources

[CAISO Tariff Appendix DD - Generator Interconnection Deliverability Allocation Procedures BPM for Generator Interconnection and Deliverability Allocation Procedures](#)

#### Questions

If you have any questions, send an email to the Interconnection Resources team at [IRInfo@caiso.com](mailto:IRInfo@caiso.com)

## ATTACHMENT A

### Grid Contract Development and Management



#### Request for Payment Instructions

#### Additional Deliverability Assessment Option (RIP 4.11) WDAT Energy Only Projects Study Deposit

**\$60,000** (see section 4.11 of [Attachment M, WDAT Resource Interconnection Procedures \(1.0.0\)](#))

#### Submittal Instructions

Please send an email with the subject line: “[WDTXXXX] – TPD Annual Deliverability Assessment Request For Payment Instructions to” Grid.Interconnections@sce.com with the required information listed below.

#### Required Information:

Project #:

Project Name:

Name to Appear on Invoice:

Billing Address:

Project Contact Name:

Project Contact Phone Number:

E-mail:

In response, you will receive detailed payment instructions within a Request for Advance Payment form that will greatly facilitate the tracking and processing of your request. The Request for Advance Payment form will contain mailing and wiring instructions along with a document number for SCE to track your payment. Please do not mail any checks along with your affidavit, instead, please use the instructions provided.