

Preliminary assessment of the relevance and impact of the standard:**PRC-023-2 – Transmission Relay Loadability****A. Relevance of the standard to be filed**

The purpose of this standard is to ensure that protective relay settings shall not limit transmission loadability, not interfere with system operators' ability to take remedial action to protect system reliability and be set to reliably detect all fault conditions and protect the electrical network from these faults.

To achieve these objectives, the requirements of the standards shall address the following aspects:

- The use of specific terminals to prevent its phase protective relay settings from limiting transmission system loadability while maintaining reliable protection of the BES for all fault conditions;
- Annual assessments of the relay loadability circuits

B. Applicability

The standard applies the transmission owners, the distribution providers and the generator owners with load-responsive phase protection systems that are part of the BES in accordance to the planning coordinators.

C. Relevance for special provisions for Quebec (Appendix QC-PRC-023-2)

Following the recommendations of the Task Force on System Protection (TFSP) of NPCC, this standard applies to the bulk power system (BPS) in Quebec.

D. Preliminary assessment of the impact of the adoption of the standard in Quebec

The preliminary assessment of the implementation and maintenance of this standard is considered low because only Hydro-Québec TransÉnergie has customers on the bulk power system and Hydro-Québec TransÉnergie has the required protection systems.

Summary of impacts

This summary establishes in a condensed and preliminary manner, the impacts on materiel, human or financial resources of the proposed standard compared to the latest revision studied or adopted by the Régie de l'énergie. The impact may vary depending on the actual applicability of the standard with certain entities whose impact is lower on the reliability on the bulk electric system in Quebec.

PRC-023-2

	Low	Moderate	Important
Implementation of the standard	●		
Maintenance of the standard	●		
Compliance Monitoring		●	

Legend:

Low:	Normal industry practice or standard involving minor adjustments to processes or practices in place.
Moderate:	Changes that require an allocation of certain material, human or financial resources to implement, maintain and monitor compliance of the proposed standard.
Important:	Changes that require significant provision and allocation of material, human or financial resources to implement, maintain and monitor compliance of the proposed standard.

A more accurate assessment will be developed from forms "Evaluation of the impacts of proposed standards" to be received from the registered entities during the comment period. This assessment will be submitted with the standard to the Régie de l'énergie.

A. Introduction

1. Title: Transmission Relay Loadability

2. Number: PRC-023-2

3. Purpose: Protective relay settings shall not limit transmission loadability; not interfere with system operators' ability to take remedial action to protect system reliability and; be set to reliably detect all fault conditions and protect the electrical network from these faults.

4. Applicability

4.1. Functional Entity

4.1.1 Transmission Owners with load-responsive phase protection systems as described in PRC-023-2 - Attachment A, applied to circuits defined in 4.2.1 (*Circuits Subject to Requirements R1 – R5*).

4.1.2 Generator Owners with load-responsive phase protection systems as described in PRC-023-2 - Attachment A, applied to circuits defined in 4.2.1 (*Circuits Subject to Requirements R1 – R5*).

4.1.3 Distribution Providers with load-responsive phase protection systems as described in PRC-023-2 - Attachment A, applied to circuits defined in 4.2.1(*Circuits Subject to Requirements R1 – R5*), provided those circuits have bi-directional flow capabilities.

4.1.4 Planning Coordinators

4.2. Circuits

4.2.1 Circuits Subject to Requirements R1 – R5

4.2.1.1 Transmission lines operated at 200 kV and above.

4.2.1.2 Transmission lines operated at 100 kV to 200 kV selected by the Planning Coordinator in accordance with R6.

4.2.1.3 Transmission lines operated below 100 kV that are part of the BES and selected by the Planning Coordinator in accordance with R6.

4.2.1.4 Transformers with low voltage terminals connected at 200 kV and above.

4.2.1.5 Transformers with low voltage terminals connected at 100 kV to 200 kV selected by the Planning Coordinator in accordance with R6.

4.2.1.6 Transformers with low voltage terminals connected below 100 kV that are part of the BES and selected by the Planning Coordinator in accordance with R6.

4.2.2 Circuits Subject to Requirement R6

4.2.2.1 Transmission lines operated at 100 kV to 200 kV and transformers with low voltage terminals connected at 100 kV to 200 kV

4.2.2.2 Transmission lines operated below 100 kV and transformers with low voltage terminals connected below 100 kV that are part of the BES

5. Effective Dates

The effective dates of the requirements in the PRC-023-2 standard corresponding to the applicable Functional Entities and circuits are summarized in the following table:

Requirement	Applicability	Effective Date	
		Jurisdictions where Regulatory Approval is Required	Jurisdictions where No Regulatory Approval is Required
R1	Each Transmission Owner, Generator Owner, and Distribution Provider with transmission lines operating at 200 kV and above and transformers with low voltage terminals connected at 200 kV and above, except as noted below.	First day of the first calendar quarter, after applicable regulatory approvals	First calendar quarter after Board of Trustees adoption
	<ul style="list-style-type: none"> For Requirement R1, criterion 10.1, to set transformer fault protection relays on transmission lines terminated only with a transformer such that the protection settings do not expose the transformer to fault level and duration that exceeds its mechanical withstand capability 	First day of the first calendar quarter 12 months after applicable regulatory approvals	First day of the first calendar quarter 12 months after Board of Trustees adoption
	<ul style="list-style-type: none"> For supervisory elements as described in PRC-023-2 - Attachment A, Section 1.6 	First day of the first calendar quarter 24 months after applicable regulatory approvals	First day of the first calendar quarter 24 months after Board of Trustees adoption
	<ul style="list-style-type: none"> For switch-on-to-fault schemes as described in PRC-023-2 - Attachment A, Section 1.3 	Later of the first day of the first calendar quarter after applicable regulatory approvals of PRC-023-2 or the first day of the first calendar quarter 39 months following applicable regulatory approvals of PRC-023-1 (October 1, 2013)	Later of the first day of the first calendar quarter after Board of Trustees adoption of PRC-023-2 or July 1, 2011 ¹
	Each Transmission Owner, Generator Owner, and Distribution Provider with circuits identified by the Planning Coordinator pursuant to Requirement R6	Later of the first day of the first calendar quarter 39 months following notification by the Planning Coordinator of a circuit's inclusion on a	Later of the first day of the first calendar quarter 39 months following notification by the Planning Coordinator of a circuit's inclusion on

¹ July 1, 2011 is the first day of the first calendar quarter 39 months following the Board of Trustees February 12, 2008 approval of PRC-023-1.

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Requirement	Applicability	Effective Date	
		Jurisdictions where Regulatory Approval is Required	Jurisdictions where No Regulatory Approval is Required
		list of circuits subject to PRC-023-2 per application of Attachment B, or the first day of the first calendar year in which any criterion in Attachment B applies, unless the Planning Coordinator removes the circuit from the list before the applicable effective date	a list of circuits subject to PRC-023-2 per application of Attachment B, or the first day of the first calendar year in which any criterion in Attachment B applies, unless the Planning Coordinator removes the circuit from the list before the applicable effective date
R2 and R3	Each Transmission Owner, Generator Owner, and Distribution Provider with transmission lines operating at 200 kV and above and transformers with low voltage terminals connected at 200 kV and above	First day of the first calendar quarter after applicable regulatory approvals	First day of the first calendar quarter after Board of Trustees adoption
	Each Transmission Owner, Generator Owner, and Distribution Provider with circuits identified by the Planning Coordinator pursuant to Requirement R6	Later of the first day of the first calendar quarter 39 months following notification by the Planning Coordinator of a circuit's inclusion on a list of circuits subject to PRC-023-2 per application of Attachment B, or the first day of the first calendar year in which any criterion in Attachment B applies, unless the Planning Coordinator removes the circuit from the list before the applicable effective date	Later of the first day of the first calendar quarter 39 months following notification by the Planning Coordinator of a circuit's inclusion on a list of circuits subject to PRC-023-2 per application of Attachment B, or the first day of the first calendar year in which any criterion in Attachment B applies, unless the Planning Coordinator removes the circuit from the list before the applicable effective date

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Requirement	Applicability	Effective Date	
		Jurisdictions where Regulatory Approval is Required	Jurisdictions where No Regulatory Approval is Required
R4	Each Transmission Owner, Generator Owner, and Distribution Provider that chooses to use Requirement R1 criterion 2 as the basis for verifying transmission line relay loadability	First day of the first calendar quarter six months after applicable regulatory approvals	First day of the first calendar quarter six months after Board of Trustees adoption
R5	Each Transmission Owner, Generator Owner, and Distribution Provider that sets transmission line relays according to Requirement R1 criterion 12	First day of the first calendar quarter six months after applicable regulatory approvals	First day of the first calendar quarter six months after Board of Trustees adoption
R6	Each Planning Coordinator shall conduct an assessment by applying the criteria in Attachment B to determine the circuits in its Planning Coordinator area for which Transmission Owners, Generator Owners, and Distribution Providers must comply with Requirements R1 through R5	First day of the first calendar quarter 18 months after applicable regulatory approvals	First day of the first calendar quarter 18 months after Board of Trustees adoption

B. Requirements

- R1.** Each Transmission Owner, Generator Owner, and Distribution Provider shall use any one of the following criteria (Requirement R1, criteria 1 through 13) for any specific circuit terminal to prevent its phase protective relay settings from limiting transmission system loadability while maintaining reliable protection of the BES for all fault conditions. Each Transmission Owner, Generator Owner, and Distribution Provider shall evaluate relay loadability at 0.85 per unit voltage and a power factor angle of 30 degrees. *[Violation Risk Factor: High] [Time Horizon: Long Term Planning]*.

Criteria:

1. Set transmission line relays so they do not operate at or below 150% of the highest seasonal Facility Rating of a circuit, for the available defined loading duration nearest 4 hours (expressed in amperes).
2. Set transmission line relays so they do not operate at or below 115% of the highest seasonal 15-minute Facility Rating² of a circuit (expressed in amperes).
3. Set transmission line relays so they do not operate at or below 115% of the maximum theoretical power transfer capability (using a 90-degree angle between the sending-end and receiving-end voltages and either reactance or complex impedance) of the circuit (expressed in amperes) using one of the following to perform the power transfer calculation:
 - An infinite source (zero source impedance) with a 1.00 per unit bus voltage at each end of the line.
 - An impedance at each end of the line, which reflects the actual system source impedance with a 1.05 per unit voltage behind each source impedance.
4. Set transmission line relays on series compensated transmission lines so they do not operate at or below the maximum power transfer capability of the line, determined as the greater of:
 - 115% of the highest emergency rating of the series capacitor.
 - 115% of the maximum power transfer capability of the circuit (expressed in amperes), calculated in accordance with Requirement R1, criterion 3, using the full line inductive reactance.
5. Set transmission line relays on weak source systems so they do not operate at or below 170% of the maximum end-of-line three-phase fault magnitude (expressed in amperes).
6. Set transmission line relays applied on transmission lines connected to generation stations remote to load so they do not operate at or below 230% of the aggregated generation nameplate capability.
7. Set transmission line relays applied at the load center terminal, remote from generation stations, so they do not operate at or below 115% of the maximum current flow from the load to the generation source under any system configuration.

² When a 15-minute rating has been calculated and published for use in real-time operations, the 15-minute rating can be used to establish the loadability requirement for the protective relays.

8. Set transmission line relays applied on the bulk system-end of transmission lines that serve load remote to the system so they do not operate at or below 115% of the maximum current flow from the system to the load under any system configuration.
9. Set transmission line relays applied on the load-end of transmission lines that serve load remote to the bulk system so they do not operate at or below 115% of the maximum current flow from the load to the system under any system configuration.
10. Set transformer fault protection relays and transmission line relays on transmission lines terminated only with a transformer so that the relays do not operate at or below the greater of:
 - 150% of the applicable maximum transformer nameplate rating (expressed in amperes), including the forced cooled ratings corresponding to all installed supplemental cooling equipment.
 - 115% of the highest operator established emergency transformer rating
- 10.1 Set load responsive transformer fault protection relays, if used, such that the protection settings do not expose the transformer to a fault level and duration that exceeds the transformer's mechanical withstand capability³.
11. For transformer overload protection relays that do not comply with the loadability component of Requirement R1, criterion 10 set the relays according to one of the following:
 - Set the relays to allow the transformer to be operated at an overload level of at least 150% of the maximum applicable nameplate rating, or 115% of the highest operator established emergency transformer rating, whichever is greater, for at least 15 minutes to provide time for the operator to take controlled action to relieve the overload.
 - Install supervision for the relays using either a top oil or simulated winding hot spot temperature element set no less than 100° C for the top oil temperature or no less than 140° C for the winding hot spot temperature⁴.
12. When the desired transmission line capability is limited by the requirement to adequately protect the transmission line, set the transmission line distance relays to a maximum of 125% of the apparent impedance (at the impedance angle of the transmission line) subject to the following constraints:
 - a. Set the maximum torque angle (MTA) to 90 degrees or the highest supported by the manufacturer.
 - b. Evaluate the relay loadability in amperes at the relay trip point at 0.85 per unit voltage and a power factor angle of 30 degrees.

³ As illustrated by the “dotted line” in IEEE C57.109-1993 - *IEEE Guide for Liquid-Immersed Transformer Through-Fault-Current Duration*, Clause 4.4, Figure 4

⁴ IEEE standard C57.91, Tables 7 and 8, specify that transformers are to be designed to withstand a winding hot spot temperature of 180 degrees C, and Annex A cautions that bubble formation may occur above 140 degrees C.

- c. Include a relay setting component of 87% of the current calculated in Requirement R1, criterion 12 in the Facility Rating determination for the circuit.
- 13.** Where other situations present practical limitations on circuit capability, set the phase protection relays so they do not operate at or below 115% of such limitations.
- R2.** Each Transmission Owner, Generator Owner, and Distribution Provider shall set its out-of-step blocking elements to allow tripping of phase protective relays for faults that occur during the loading conditions used to verify transmission line relay loadability per Requirement R1. *[Violation Risk Factor: High] [Time Horizon: Long Term Planning]*
- R3.** Each Transmission Owner, Generator Owner, and Distribution Provider that uses a circuit capability with the practical limitations described in Requirement R1, criterion 6, 7, 8, 9, 12, or 13 shall use the calculated circuit capability as the Facility Rating of the circuit and shall obtain the agreement of the Planning Coordinator, Transmission Operator, and Reliability Coordinator with the calculated circuit capability. *[Violation Risk Factor: Medium] [Time Horizon: Long Term Planning]*
- R4.** Each Transmission Owner, Generator Owner, and Distribution Provider that chooses to use Requirement R1 criterion 2 as the basis for verifying transmission line relay loadability shall provide its Planning Coordinator, Transmission Operator, and Reliability Coordinator with an updated list of circuits associated with those transmission line relays at least once each calendar year, with no more than 15 months between reports. *[Violation Risk Factor: Lower] [Time Horizon: Long Term Planning]*
- R5.** Each Transmission Owner, Generator Owner, and Distribution Provider that sets transmission line relays according to Requirement R1 criterion 12 shall provide an updated list of the circuits associated with those relays to its Regional Entity at least once each calendar year, with no more than 15 months between reports, to allow the ERO to compile a list of all circuits that have protective relay settings that limit circuit capability. *[Violation Risk Factor: Lower] [Time Horizon: Long Term Planning]*
- R6.** Each Planning Coordinator shall conduct an assessment at least once each calendar year, with no more than 15 months between assessments, by applying the criteria in Attachment B to determine the circuits in its Planning Coordinator area for which Transmission Owners, Generator Owners, and Distribution Providers must comply with Requirements R1 through R5. The Planning Coordinator shall: *[Violation Risk Factor: High] [Time Horizon: Long Term Planning]*
 - 6.1** Maintain a list of circuits subject to PRC-023-2 per application of Attachment B, including identification of the first calendar year in which any criterion in Attachment B applies.
 - 6.2** Provide the list of circuits to all Regional Entities, Reliability Coordinators, Transmission Owners, Generator Owners, and Distribution Providers within its Planning Coordinator area within 30 calendar days of the establishment of the initial list and within 30 calendar days of any changes to that list.

C. Measures

- M1.** Each Transmission Owner, Generator Owner, and Distribution Provider shall have evidence such as spreadsheets or summaries of calculations to show that each of its transmission relays is set according to one of the criteria in Requirement R1, criterion 1 through 13 and shall have evidence such as coordination curves or summaries of calculations that show that relays set per criterion 10 do not expose the transformer to fault levels and durations beyond those indicated in the standard. (R1)

- M2.** Each Transmission Owner, Generator Owner, and Distribution Provider shall have evidence such as spreadsheets or summaries of calculations to show that each of its out-of-step blocking elements is set to allow tripping of phase protective relays for faults that occur during the loading conditions used to verify transmission line relay loadability per Requirement R1. (R2)
- M3.** Each Transmission Owner, Generator Owner, and Distribution Provider with transmission relays set according to Requirement R1, criterion 6, 7, 8, 9, 12, or 13 shall have evidence such as Facility Rating spreadsheets or Facility Rating database to show that it used the calculated circuit capability as the Facility Rating of the circuit and evidence such as dated correspondence that the resulting Facility Rating was agreed to by its associated Planning Coordinator, Transmission Operator, and Reliability Coordinator. (R3)
- M4.** Each Transmission Owner, Generator Owner, or Distribution Provider that sets transmission line relays according to Requirement R1, criterion 2 shall have evidence such as dated correspondence to show that it provided its Planning Coordinator, Transmission Operator, and Reliability Coordinator with an updated list of circuits associated with those transmission line relays within the required timeframe. The updated list may either be a full list, a list of incremental changes to the previous list, or a statement that there are no changes to the previous list. (R4)
- M5.** Each Transmission Owner, Generator Owner, or Distribution Provider that sets transmission line relays according to Requirement R1, criterion 12 shall have evidence such as dated correspondence that it provided an updated list of the circuits associated with those relays to its Regional Entity within the required timeframe. The updated list may either be a full list, a list of incremental changes to the previous list, or a statement that there are no changes to the previous list. (R5)
- M6.** Each Planning Coordinator shall have evidence such as power flow results, calculation summaries, or study reports that it used the criteria established within Attachment B to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard as described in Requirement R6. The Planning Coordinator shall have a dated list of such circuits and shall have evidence such as dated correspondence that it provided the list to the Regional Entities, Reliability Coordinators, Transmission Owners, Generator Owners, and Distribution Providers within its Planning Coordinator area within the required timeframe.

D. Compliance

1. Compliance Monitoring Process

1.1. Compliance Monitoring Responsibility

- For entities that do not work for the Regional Entity, the Regional Entity shall serve as the Compliance Enforcement Authority.
- For functional entities that work for their Regional Entity, the ERO shall serve as the Compliance Enforcement Authority.

1.2. Data Retention

The Transmission Owner, Generator Owner, Distribution Provider and Planning Coordinator shall keep data or evidence to show compliance as identified below unless directed by its Compliance Enforcement Authority to retain specific evidence for a longer period of time as part of an investigation:

The Transmission Owner, Generator Owner, and Distribution Provider shall each retain documentation to demonstrate compliance with Requirements R1 through R5 for three calendar years.

The Planning Coordinator shall retain documentation of the most recent review process required in R6. The Planning Coordinator shall retain the most recent list of circuits in its Planning Coordinator area for which applicable entities must comply with the standard, as determined per R6.

If a Transmission Owner, Generator Owner, Distribution Provider or Planning Coordinator is found non-compliant, it shall keep information related to the non-compliance until found compliant or for the time specified above, whichever is longer.

The Compliance Monitor shall keep the last audit record and all requested and submitted subsequent audit records.

1.3. Compliance Monitoring and Assessment Processes

- Compliance Audit
- Self-Certification
- Spot Checking
- Compliance Violation Investigation
- Self-Reporting
- Complaint

1.4. Additional Compliance Information

None.

2. Violation Severity Levels:

Requirement	Lower	Moderate	High	Severe
R1	N/A	N/A	N/A	<p>The responsible entity did not use any one of the following criteria (Requirement R1 criterion 1 through 13) for any specific circuit terminal to prevent its phase protective relay settings from limiting transmission system loadability while maintaining reliable protection of the Bulk Electric System for all fault conditions.</p> <p>OR</p> <p>The responsible entity did not evaluate relay loadability at 0.85 per unit voltage and a power factor angle of 30 degrees.</p>
R2	N/A	N/A	N/A	<p>The responsible entity failed to ensure that its out-of-step blocking elements allowed tripping of phase protective relays for faults that occur during the loading conditions used to verify transmission line relay loadability per Requirement R1.</p>
R3	N/A	N/A	N/A	<p>The responsible entity that uses a circuit capability with the practical limitations described in Requirement R1 criterion 6, 7, 8, 9, 12, or 13 did not use the calculated circuit capability as the Facility Rating of the circuit.</p> <p>OR</p>

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Requirement	Lower	Moderate	High	Severe
				The responsible entity did not obtain the agreement of the Planning Coordinator, Transmission Operator, and Reliability Coordinator with the calculated circuit capability.
R4	N/A	N/A	N/A	The responsible entity did not provide its Planning Coordinator, Transmission Operator, and Reliability Coordinator with an updated list of circuits that have transmission line relays set according to the criteria established in Requirement R1 criterion 2 at least once each calendar year, with no more than 15 months between reports.
R5	N/A	N/A	N/A	The responsible entity did not provide its Regional Entity, with an updated list of circuits that have transmission line relays set according to the criteria established in Requirement R1 criterion 12 at least once each calendar year, with no more than 15 months between reports.
R6	N/A	The Planning Coordinator used the criteria established within Attachment B to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard and met parts 6.1 and 6.2, but more than 15 months and less than 24 months lapsed between assessments.	The Planning Coordinator used the criteria established within Attachment B to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard and met parts 6.1 and 6.2, but 24 months or more lapsed between assessments.	The Planning Coordinator failed to use the criteria established within Attachment B to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard. OR The Planning Coordinator used the criteria established within

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Requirement	Lower	Moderate	High	Severe
		<p>OR</p> <p>The Planning Coordinator used the criteria established within Attachment B at least once each calendar year, with no more than 15 months between assessments to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard and met 6.1 and 6.2 but failed to include the calendar year in which any criterion in Attachment B first applies.</p> <p>OR</p> <p>The Planning Coordinator used the criteria established within Attachment B at least once each calendar year, with no more than 15 months between assessments to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard and met 6.1 and 6.2 but provided the list of circuits to the Reliability Coordinators, Transmission Owners, Generator Owners, and Distribution Providers within its Planning Coordinator area between 31 days and 45 days after the list was established or updated. (part 6.2)</p>	<p>OR</p> <p>The Planning Coordinator used the criteria established within Attachment B at least once each calendar year, with no more than 15 months between assessments to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard and met 6.1 and 6.2 but provided the list of circuits to the Reliability Coordinators, Transmission Owners, Generator Owners, and Distribution Providers within its Planning Coordinator area between 46 days and 60 days after list was established or updated. (part 6.2)</p>	<p>Attachment B, at least once each calendar year, with no more than 15 months between assessments to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard but failed to meet parts 6.1 and 6.2.</p> <p>OR</p> <p>The Planning Coordinator used the criteria established within Attachment B at least once each calendar year, with no more than 15 months between assessments to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard but failed to maintain the list of circuits determined according to the process described in Requirement R6. (part 6.1)</p> <p>OR</p> <p>The Planning Coordinator used the criteria established within Attachment B at least once each calendar year, with no more than 15 months between assessments to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard and met 6.1 but failed to provide the list of circuits to the Reliability Coordinators, Transmission</p>

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Requirement	Lower	Moderate	High	Severe
				<p>Owners, Generator Owners, and Distribution Providers within its Planning Coordinator area or provided the list more than 60 days after the list was established or updated. (part 6.2)</p> <p>OR</p> <p>The Planning Coordinator failed to determine the circuits in its Planning Coordinator area for which applicable entities must comply with the standard.</p>

E. Regional Differences

None

F. Supplemental Technical Reference Document

1. The following document is an explanatory supplement to the standard. It provides the technical rationale underlying the requirements in this standard. The reference document contains methodology examples for illustration purposes it does not preclude other technically comparable methodologies

“Determination and Application of Practical Relaying Loadability Ratings,” Version 1.0, June 2008, prepared by the System Protection and Control Task Force of the NERC Planning Committee, available at:

http://www.nerc.com/fileUploads/File/Standards/Relay_Loadability_Reference_Doc_Clean_Final_2008July3.pdf

Version History

Version	Date	Action	Change Tracking
1	February 12, 2008	Approved by Board of Trustees	New
1	March 19, 2008	Corrected typo in last sentence of Severe VSL for Requirement 3 — “then” should be “than.”	Errata
1	March 18, 2010	Approved by FERC	
1	Filed for approval April 19, 2010	Changed VRF for R3 from Medium to High; changed VSLs for R1, R2, R3 to binary Severe to comply with Order 733	Revision
2	March 10, 2011 approved by Board of Trustees	Revised to address initial set of directives from Order 733	Revision (Project 2010-13)
2	March 15, 2012	FERC order issued approving PRC-023-2 (approval becomes effective May 7, 2012)	

PRC-023 — Attachment A

- 1.** This standard includes any protective functions which could trip with or without time delay, on load current, including but not limited to:
 - 1.1.** Phase distance.
 - 1.2.** Out-of-step tripping.
 - 1.3.** Switch-on-to-fault.
 - 1.4.** Overcurrent relays.
 - 1.5.** Communications aided protection schemes including but not limited to:
 - 1.5.1** Permissive overreach transfer trip (POTT).
 - 1.5.2** Permissive under-reach transfer trip (PUTT).
 - 1.5.3** Directional comparison blocking (DCB).
 - 1.5.4** Directional comparison unblocking (DCUB).
 - 1.6.** Phase overcurrent supervisory elements (i.e., phase fault detectors) associated with current-based, communication-assisted schemes (i.e., pilot wire, phase comparison, and line current differential) where the scheme is capable of tripping for loss of communications.
- 2.** The following protection systems are excluded from requirements of this standard:
 - 2.1.** Relay elements that are only enabled when other relays or associated systems fail. For example:
 - Overcurrent elements that are only enabled during loss of potential conditions.
 - Elements that are only enabled during a loss of communications except as noted in section 1.6
 - 2.2.** Protection systems intended for the detection of ground fault conditions.
 - 2.3.** Protection systems intended for protection during stable power swings.
 - 2.4.** Generator protection relays that are susceptible to load.
 - 2.5.** Relay elements used only for Special Protection Systems applied and approved in accordance with NERC Reliability Standards PRC-012 through PRC-017 or their successors.
 - 2.6.** Protection systems that are designed only to respond in time periods which allow 15 minutes or greater to respond to overload conditions.
 - 2.7.** Thermal emulation relays which are used in conjunction with dynamic Facility Ratings.
 - 2.8.** Relay elements associated with dc lines.
 - 2.9.** Relay elements associated with dc converter transformers.

PRC-023 — Attachment B

Circuits to Evaluate

- Transmission lines operated at 100 kV to 200 kV and transformers with low voltage terminals connected at 100 kV to 200 kV.
- Transmission lines operated below 100 kV and transformers with low voltage terminals connected below 100 kV that are part of the BES.

Criteria

If any of the following criteria apply to a circuit, the applicable entity must comply with the standard for that circuit.

- B1.** The circuit is a monitored Facility of a permanent flowgate in the Eastern Interconnection, a major transfer path within the Western Interconnection as defined by the Regional Entity, or a comparable monitored Facility in the Québec Interconnection, that has been included to address reliability concerns for loading of that circuit, as confirmed by the applicable Planning Coordinator.
- B2.** The circuit is a monitored Facility of an IROL, where the IROL was determined in the planning horizon pursuant to FAC-010.
- B3.** The circuit forms a path (as agreed to by the Generator Operator and the transmission entity) to supply off-site power to a nuclear plant as established in the Nuclear Plant Interface Requirements (NPIRs) pursuant to NUC-001.
- B4.** The circuit is identified through the following sequence of power flow analyses⁵ performed by the Planning Coordinator for the one-to-five-year planning horizon:
- a. Simulate double contingency combinations selected by engineering judgment, without manual system adjustments in between the two contingencies (reflects a situation where a System Operator may not have time between the two contingencies to make appropriate system adjustments).
 - b. For circuits operated between 100 kV and 200 kV evaluate the post-contingency loading, in consultation with the Facility owner, against a threshold based on the Facility Rating assigned for that circuit and used in the power flow case by the Planning Coordinator.
 - c. When more than one Facility Rating for that circuit is available in the power flow case, the threshold for selection will be based on the Facility Rating for the loading duration nearest four hours.
 - d. The threshold for selection of the circuit will vary based on the loading duration assumed in the development of the Facility Rating.

⁵ Past analyses may be used to support the assessment if no material changes to the system have occurred since the last assessment

- i. If the Facility Rating is based on a loading duration of up to and including four hours, the circuit must comply with the standard if the loading exceeds 115% of the Facility Rating.
 - ii. If the Facility Rating is based on a loading duration greater than four and up to and including eight hours, the circuit must comply with the standard if the loading exceeds 120% of the Facility Rating.
 - iii. If the Facility Rating is based on a loading duration of greater than eight hours, the circuit must comply with the standard if the loading exceeds 130% of the Facility Rating.
 - e. Radially operated circuits serving only load are excluded.
- B5.** The circuit is selected by the Planning Coordinator based on technical studies or assessments, other than those specified in criteria B1 through B4, in consultation with the Facility owner.
- B6.** The circuit is mutually agreed upon for inclusion by the Planning Coordinator and the Facility owner.

Appendix QC-PRC-023-2
Provisions specific to the standard PRC-023-2 applicable in Québec

This appendix establishes specific provisions for the application of the standard in Québec. Provisions of the standard and of its appendix must be read together for the purposes of understanding and interpretation. Where the standard and appendix differ, the appendix shall prevail.

A. Introduction

- 1. Title:** Disturbance Monitoring
- 2. Number:** PRC-023-2
- 3. Purpose:** No specific provision
- 4. Applicability:** No specific provision
- 5. Effective Date:**
 - 5.1.** Adoption of the standard by the Régie de l'énergie: Month xx 201x
 - 5.2.** Adoption of the appendix by the Régie de l'énergie: Month xx 201x
 - 5.3.** Effective date of the standard and its appendix in Québec: Month xx 201x
- 6. Scope:** *Bulk Power System (BPS)*

B. Requirements

R1. No specific provision

Criteria:

- 1.** No specific provision
- 2.** Set transmission line relays so they do not operate at or below 115% of the highest seasonal Facility Rating of a circuit (expressed in amperes) on:
 - 2.1.** 30 minutes when based on the stability limits which is the most restrictive or
 - 2.2.** 15-minute when based on the overload limits which is the most restrictive¹
- 3.** No specific provision
- 4.** No specific provision
- 5.** No specific provision
- 6.** No specific provision
- 7.** No specific provision
- 8.** No specific provision
- 9.** No specific provision
- 10.** No specific provision

¹ When a 15-minute rating has been calculated and published for use in real-time operations, the 15-minute rating can be used to establish the loadability requirement for the protective relays.

- 11.** For transformer overload protection relays that do not comply with the loadability component of Requirement R1, criterion 10 set the relays according to one of the following:
- Set the relays to allow the transformer to be operated at a stability limit of at least 150% of the maximum applicable nameplate rating, or 115% of the highest operator established emergency transformer rating, whichever is greater, for at least 30 minutes to provide time for the operator to take controlled action to relieve the overload.
 - Set the relays to allow the transformer to be operated at an overload level of at least 150% of the maximum applicable nameplate rating, or 115% of the highest operator established emergency transformer rating, whichever is greater, for at least 15 minutes to provide time for the operator to take controlled action to relieve the overload.
 - Install supervision for the relays using either a top oil or simulated winding hot spot temperature element set no less than 100° C for the top oil temperature or no less than 140° C² for the winding hot spot temperature. For 735 kV transformers, the winding hot spot temperature element must be set to a temperature of at least 130°C.

12. No specific provision

13. No specific provision

R2. to R6. No specific provision

C. Measures

No specific provision

D. Compliance

1. Compliance Monitoring Process

1.1. Compliance Monitoring Responsibility

The Régie de l'énergie is responsible, in Québec, for compliance monitoring with respect to the reliability standard and its appendix that it adopts.

1.2. Compliance Monitoring Period and Reset Timeframe

No specific provision

1.3. Data Retention

No specific provision

1.4. Additional Compliance Information

No specific provision

2. Levels of Non-Compliance

No specific provision

E. Regional Differences

No specific provision

² IEEE standard C57.91, Tables 7 and 8, specify that transformers are to be designed to withstand a winding hot spot temperature of 180 degrees C, and Annex A cautions that bubble formation may occur above 140 degrees C.

F. Supplemental Technical Reference Document

No specific provision

Version History of the Appendix

Version	Date	Action	Change Tracking
0			New

PRC-023 – Appendix A

- 1.** No specific provision
- 2.** No specific provision
 - 2.1** No specific provision
 - 2.2** No specific provision
 - 2.3** No specific provision
 - 2.4** No specific provision
 - 2.5** No specific provision
 - 2.6** Protection systems that are designed only to respond in time periods which allow 15 minutes or greater to respond to overload conditions, or at least 30 minutes in the case where the system limit is based on the stability limit.
 - 2.7** No specific provision
 - 2.8** No specific provision
 - 2.9** No specific provision

PRC-023 – Appendix B

No specific provision