

GIPT RULE 21 EXPORT for External Customers

Grid Interconnection Processing Tool

External User Guide – Application

Submittal



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Overview

This user guide covers various features and functions of the Grid Interconnection Processing Tool (GIPT) for the Rule 21 Export Requests for Submittal through Contract Development only.

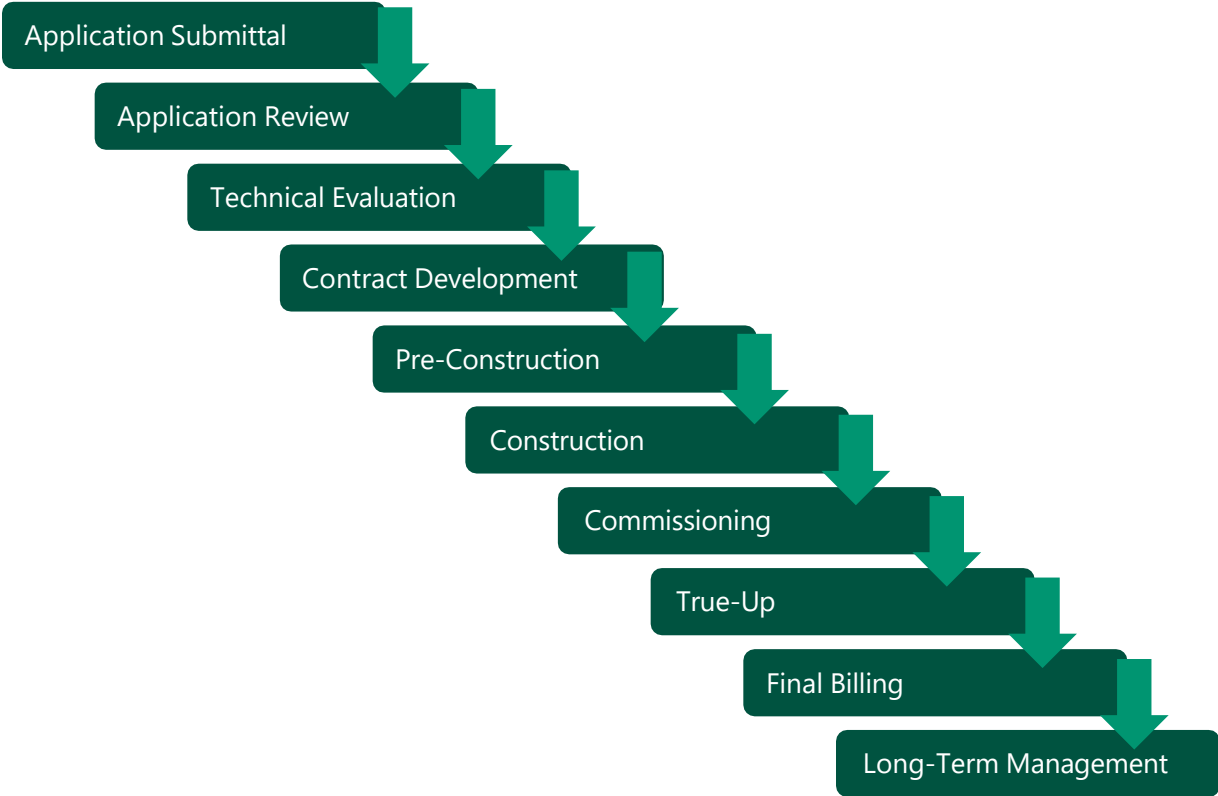
This document is intended for external SCE Customers (which includes 3rd party developers) who will submit and manage Interconnection Requests (IRs) and payments only.

This section provides an overview of GIPT for Rule 21 Export Requests and the business processes that use the tool.

What is GIPT?

The Grid Interconnection Processing Tool (GIPT) is a web-based tool that allows Customers to submit requests to interconnect Distributed Energy Resources (DER) to SCE's electrical system under SCE's interconnection tariffs.

GIPT streamlines the end-to-end cross-organizational and generation interconnection processes and centralizes the DER information captured during these processes:





GIPT is used for Rule 21 Interconnection Requests, Wholesale Distribution Access Tariff (WDAT) Generation Interconnection Requests. The Grid Interconnection Processing Tool is NOT used for requests participating in the Solar Billing Plan. ¹

This user guide covers the Customer side of GIPT RULE 21 EXPORT processes for Submittal through Contract Development only.

Both Customers/Developers and Internal Users use GIPT.

Through GIPT, Customers can:

- ◆ Enter project information.
- ◆ Retrieve and review the results of the analysis performed by SCE.
- ◆ Generate invoices to submit payment offline when required.

Through GIPT, Internal Users can:

- ◆ Evaluate and approve Customer requests.
- ◆ Document deficiencies
- ◆ Review preliminary study results.
- ◆ Generate study reports.
- ◆ Itemize scope of work.
- ◆ Create cost estimates.
- ◆ Attach contracts.
- ◆ Note construction activities.
- ◆ Provide commissioning test updates for Customer.
- ◆ Perform true-up activities: Assemble all required documents for final billing.
- ◆ Create final billing.
- ◆ Perform long-term management activities.

¹ Installation of new Solar Billing Plan requests shall be submitted to the Solar Billing Plan portal. Additionally, new Meter Socket Adaptor requests and Planning requests are hosted in separate portals and are NOT accommodated by the Grid Interconnection Processing Tool at this time. We do ask for reference IDs if you are submitting into other portals so that our review team can cross reference information, if needed.

What is RULE 21 EXPORT?

Initiating a Request for Interconnection under Rule 21 for Exporting Projects

Electric Rule 21 describes the interconnection, operating, and metering requirements for generation facilities to be connected to a utility’s distribution system, over which the California Public Utilities Commission (CPUC) has jurisdiction. Each of California’s large investor-owned utilities (IOUs) has its own Rule 21 tariff as part of its electric rules; however, they are largely equal in content. For the latest news and regulatory developments on Rule 21, please visit the [CPUC Rule 21](#). Generally speaking, “exporting projects” are those generating systems that are designed for the purpose of supplying unused power into SCE’s electric system for sale. This GIPT Rule 21 Export system and process does not apply for projects seeking Net Energy Metering or Solar Billing Plan credits. If you are unsure which process and agreement type is applicable for your desired procurement program, please reach out to energy procurement at www.sce.com/energyprocurement
See also the [Program Matrix](#)ⁱ



Refer to our website: [Interconnecting Generation under Rule 21 Solar for Business | SCE](#)
For more information about SCE’s Rule 21 Export.

Key Terms

The table below lists key terms used in GIPT and their description.

GIPT Term	Description
My Projects	All projects that you have submitted
Case	A single Interconnection Request or project submittal, also referred to as a “project,” “contract,” or “application”
Case 360	At-a-glance view of key information about a case
Case ID/Project ID	A system-generated Identification Number associated with a single Interconnection Request or project submittal
GIPT	The Grid Interconnection Processing Tool acronym
My Pending Tasks (formerly known as To-Do’s)	Items pending your response or action
Tabs	Horizontal navigation items within a window

Business Processes

When submitting an Interconnection Request (IR), the following business processes take place:

1. **Customer** completes an Interconnection Request (IR) along with applicable attachments.
2. **Customer** reviews the application (IR) and acknowledges meeting the acceptable application requirements per RULE 21.
3. **Customer** submits payment to SCE.
4. SCE reviews the application for acceptability. If unacceptable, notifies Customer of information needed to begin processing.
5. SCE assigns internal subject matter experts to review the application for completeness and validity. If incomplete, notifies Customer of information needed to continue the review. See also section E.5 of the Rule 21 tariff – if the application is not deemed complete within the tariff timelines, it will be withdrawn.
6. Once application is complete, SCE performs a Technical Evaluation. If it fails², SCE notifies Customer.



In case an application fails the Technical Evaluation, the Customer can:

- ◆ Schedule a results meeting, if allowed within the Rule 21 Tariff,
 - ◆ Withdraw the application, or
 - ◆ Request Modify the original application, if allowed within the Rule 21 Tariff.
7. Once Technical Evaluation is completed, SCE drafts a contract for Customer to review.
 8. Once **Customer** agrees to the contract, SCE develops a final contract for Customer to sign.

If Construction of upgrades are needed:

9. **Customer** is required to pay the invoice in advance of Construction.
10. SCE puts together a Welcome Package, which includes, as appropriate, a list of required documents from Customer prior to or during the actual Construction of the project.
11. During the Construction stage, SCE reviews and approves the required documents submitted by Customer.
12. Customer and SCE may have additional action items as noted in the contract, which may include a milestone table or payment schedule.

Following the Construction of upgrades, or if Construction is not needed:

² "Failure" can refer to Fast Track Initial Review screens, Fast Track Supplemental Review screens, or Detailed Study Electrical Independence Test screens.

13. Commissioning Testing is performed to verify protective settings and functionality and is required upon initial Parallel Operation of a Generating Facility.
14. SCE delivers to Customer an invoice for the final cost of construction of the Interconnection Facilities and Distribution Upgrades, as provided to Customer.
15. There may be additional requirements such as financial security postings throughout the process.



This user guide covers GIPT RULE 21 EXPORT processes for Submittal through Contract Development only. In the event this user guide, GIPT, or the tariff are not in alignment, the tariff shall prevail.

GIPT General Navigation

This section outlines the supported browsers of GIPT, and explains how to access, register for, and navigate the tool.

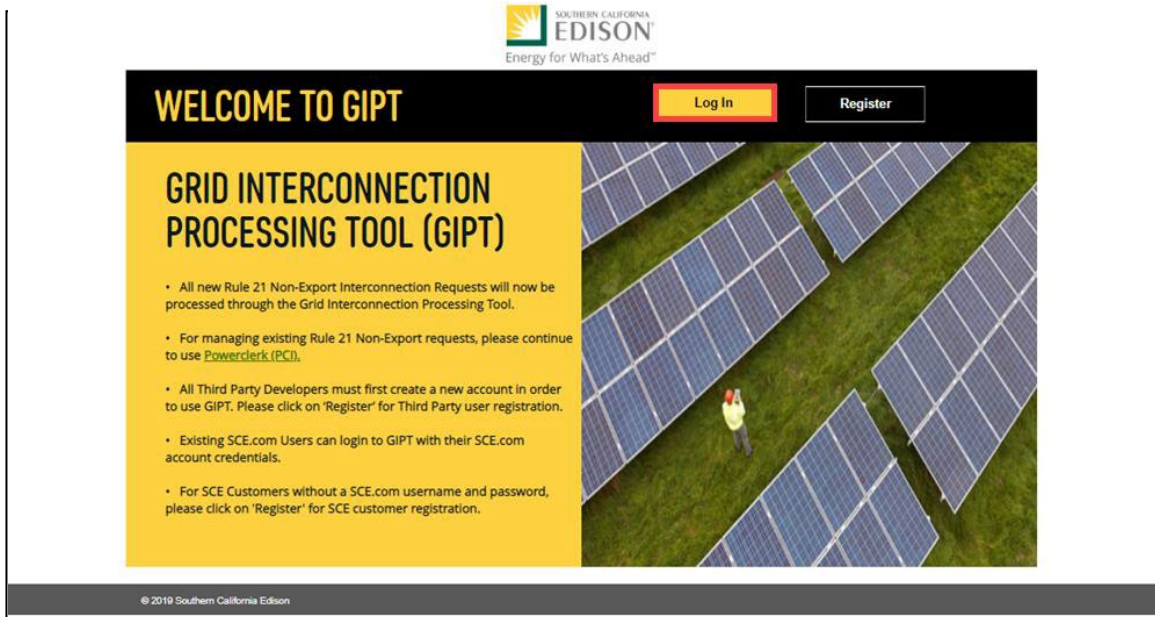
Supported Browsers

Chrome is the preferred browser for GIPT, but the tool works with any browser.

Accessing and Logging on to GIPT

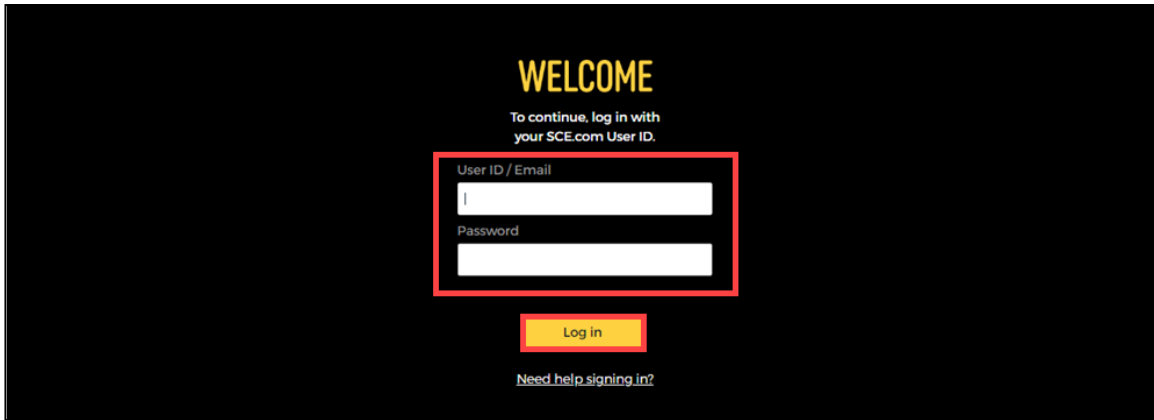
To access and log on to GIPT:

1. Access the URL: [GIPT \(sce.com\)](https://sce.com).
The **Grid Interconnection Processing Tool (GIPT)** page displays.
2. Select **Log In**.



The **GIPT Log In** screen displays.

3. Enter your **User ID/Email** and **Password**.
4. Click **Log In**.



The **GIPT Welcome** screen displays.

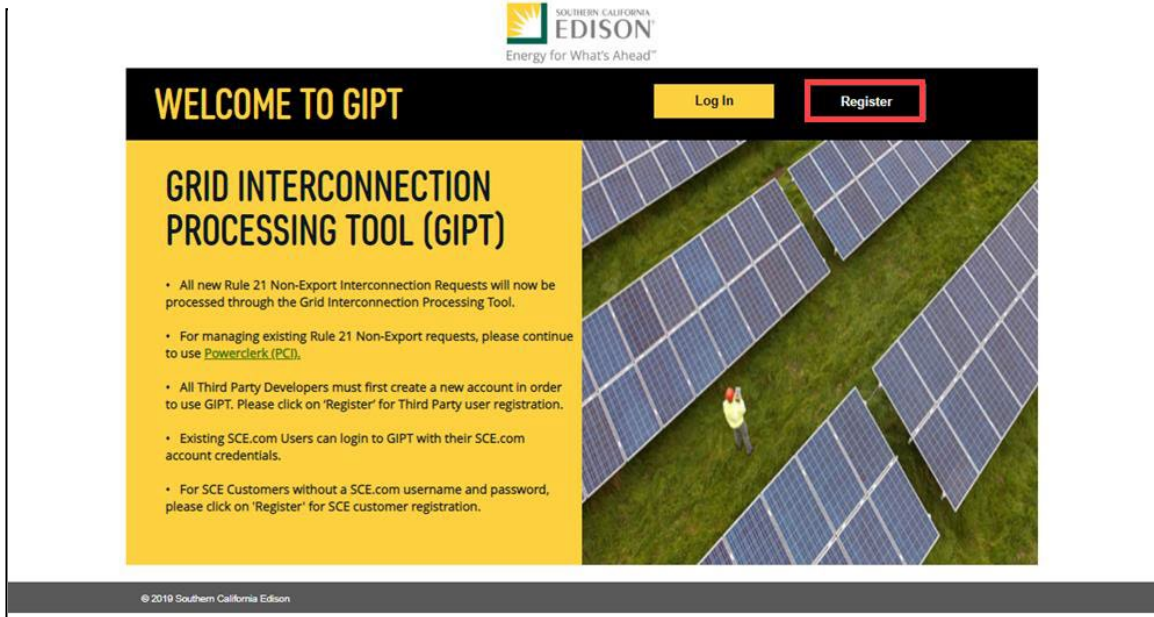
The Welcome screen is updated to include scheduled outage notifications. When a scheduled outage notification is displayed, please ensure you save your work and log out prior to the scheduled outage window.

Recommended: Bookmark this page for easy access in the future.

Registering as a New SCE User

To register as a new user:

1. Select **Register**.

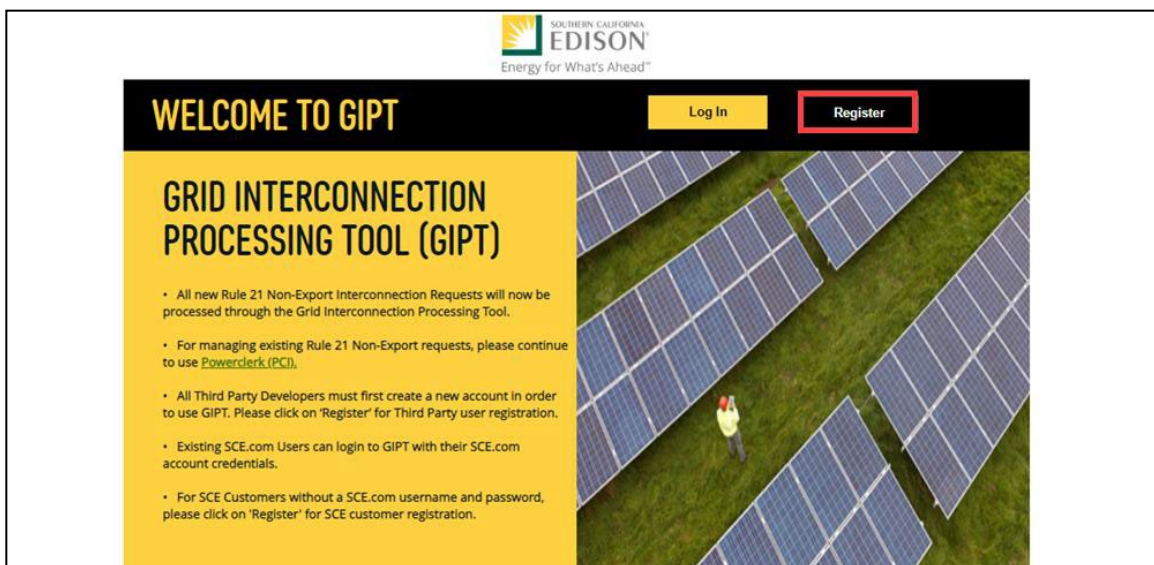


The **Registration** screen displays.

Registering as a Third Party

To register as a third party:

1. Select **Register**.



3. The **Registration** screen displays.
4. Complete the required fields.
5. Select **Register**.
6. You will get an email link to click on to confirm your email is active. Once you click the link, a request will be sent to SCE to approve your request. This can take a couple of days.
7. Once your registration is approved by SCE, you will receive an email. Please click the login link on www.sce.com/gridinterconnection when logging in the first time. The email link takes you to the tool that works with the SCE single sign-on which may not work.

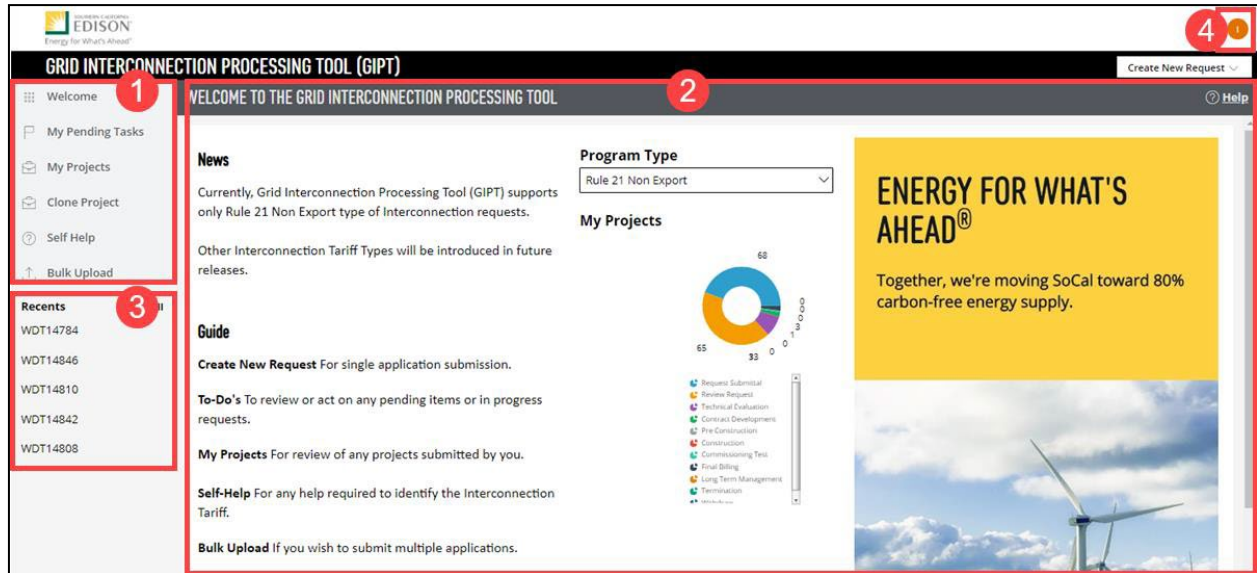
Registering as a Customer

1. If you are a self-installer, you can login to your sce.com billing account and open the Grid Interconnection Processing Tool within the same browser you should automatically login.
2. If you are a self-installer but do not yet have a sce.com account login, you can register as a "Customer" instead of a Third Party. Additional information can be found on page 10 of the following: edisonintl.sharepoint.com/aboutme/TrainingCentral/Forms/References.aspx?id=%2Faboutme%2FTrainingCentral%2FGIPT_DROP3_CUST_UG%2Epdf&parent=%2Faboutme%2FTraining_Central

GIPT Home Screen Layout

Every GIPT Home Screen consists of a few main sections:

1. **Left Panel** - Lists which functions you can select to display in the main work area.
2. **Main Work Area** – Displays information based on the function selected on the left panel.
3. **Recents** – Displays your most recent 5 cases.
4. **User's Initials** – Allows you to log off GIPT.



GIPT RULE 21 EXPORT Functions

The left panel lists the functions available to you, and the main work area displays information based on your selected function.

The functions available to you are:

- ◆ Welcome – Provides a high-level view of GIPT and GIPT cases.
- ◆ My Pending Tasks/To-Do's – Displays a list of projects where you have a task to do.
- ◆ My Projects – Displays a list of all projects you submitted.
- ◆ Clone Project – Where you can clone a current project.
- ◆ Self-Help – Helps you with how to use the tool.



The My Pending Tasks/To-Do's, My Projects, and Clone Project functions automatically display the Rule 21 Non-Export Program Type.

Remember to update the Program Type to Rule 21 Export (RULE 21 EXPORT) to view RULE 21 EXPORT cases.

Application Submittal

You can create a new Interconnection Request (IR) for the Rule 21 Export (RULE 21 EXPORT) in GIPT.

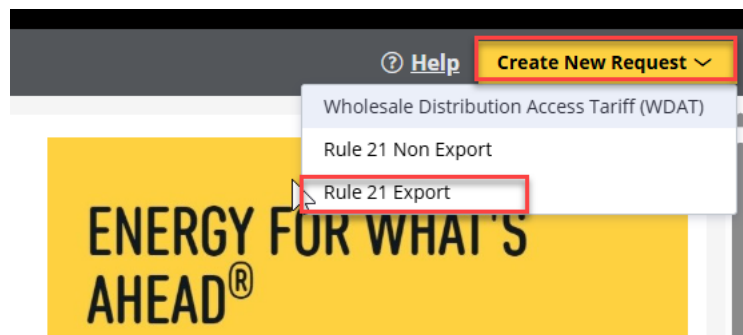
This section explains how to create a new request and how to complete the different sections of the request form.

Alternatively, you can clone an existing case using the Clone Project function.

Creating a New Request

To create a new Interconnection Request:

1. Select the Create New Request drop down menu from the GIPT home screen.
2. Select Rule 21 Export



3. Complete the Interconnection Request Sections

New Request Screen Layout

The New Request screen is where you can:

1. Complete each section of the form in the main work area.
2. Navigate to different sections by selecting the topic you want to complete.
3. Navigate through the new request.
 - a. Cancel: Closes the project view
 - b. Save: Saves your progress
 - c. Continue: Takes you to the next section of the form

Note: In certain sections of the form, the Cancel button is replaced with the Back button. The Back button takes you to the previous section of the form.

Request Form Sections – Overview

You must complete all the form sections to submit the new Interconnection Request. Payment is also required to complete the submittal.

The following subsections explain how to complete each area of the request form.



- ◆ Items marked with a red asterisk * are required fields.
 - ◆ Do not use special characters (i.e., a hyphen, dash, etc.)
1. In the Project Information, you will be asked for the project name, location information, and contact information for the Customer and Developer. In some instances, these may be the same. Note that the login associated with the account will receive the majority of the project communications. The customer contact and project contact will receive some

notifications.

2. The Project Name must be unique and meet the CAISO prohibited project names guidelines. While these are not CAISO projects, since they are export, we reference the same guidelines.
3. Please input a Project Location description. In the event your project does not yet have an established physical address, please ensure you include GPS coordinates.
4. After each section is complete, please select the "Continue" button in the lower right.

Note: If the Contractual Notice Recipient's information is the same as the Customer Contact or Representative of Customer, select the drop-down list. Then select the applicable information. This automatically completes this section.

The screenshot shows a web form for 'Contractual Notice Recipients - Contact Information'. The form is titled 'PENDING-SUBMITTAL' and 'Contractual Notice Recipients - Contact Information'. It contains several input fields and a dropdown menu. The dropdown menu is highlighted with a red box and contains the following options: 'Select', 'Customer Contact', and 'Representative of Customer'. The form also includes fields for 'Company Name', 'Email (to receive project updates)', 'Street Address', 'City', 'State', 'Zip Code', 'Phone', and 'Fax'. A 'Create Case' button is located at the bottom left. On the right side, there is a sidebar with a 'Project Information' section containing links to 'Facility Information', 'Study Information', 'Generating Unit Details', 'Additional Information', 'Signatories', 'Attachments', 'Self Review Checklist', and 'Forms and Payment'.

Facility Information

To complete the Facility Information:

1. Select **Facility Information**, if not currently selected.

The **Facility Information** screen displays.

2. Complete the **Net Megawatt** information.
3. Select the **type of project and general equipment**.

Note: Depending on which type of project and general description you select, additional fields display.

4. Enter the **Point of Interconnection (POI)**.

Note: Different fields display for each POI you select. If your POI is directly to a substation, select “Substation”. If your POI is to a Distribution Feeder or Subtransmission Line, then select Distribution Feeder or Subtransmission Line. If you are not sure where your POI is, or if it is related to a project in progress, then select “Approximate location of the proposed Point of Interconnection”. It is strongly recommended to use the DRPEP link to determine a preferred POI.

5. Input the Proposed Key Dates. Regarding the Commercial Operation Date: Please ensure it is realistic and that your site exclusivity documentation is, at a minimum, through the Commercial Operation Date. Site Exclusivity documentation can be uploaded in a later screen.

Study Information

To complete the Study Information:

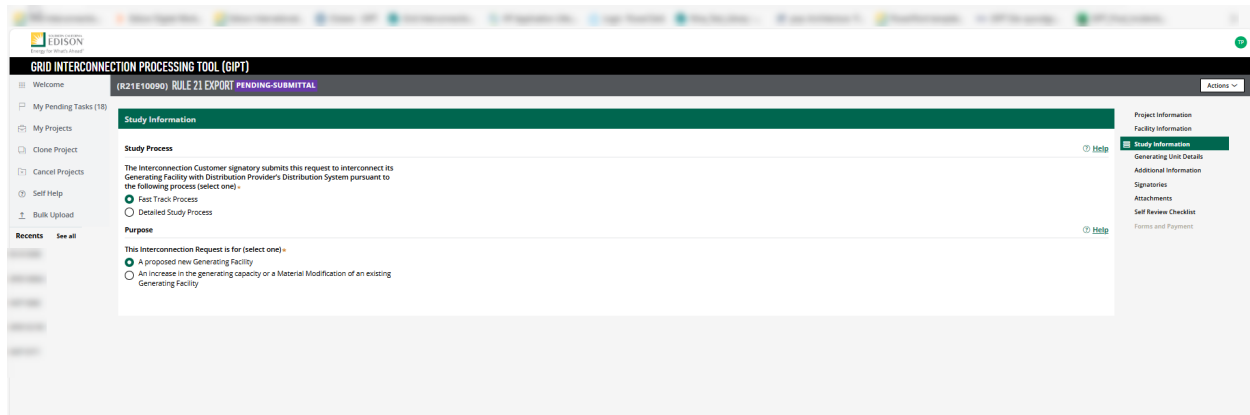
1. Select **Study Information**, if not currently selected.

The **Study Information** screen displays

2. Select a **Study Process**
3. Select a **Purpose**.

Note: The Detailed Study Process selection process may result in a Distribution Group Study or Independent Study Process, depending on factors including timing of submittal and whether or not screens Q & R pass. Failure of screen Q will result in withdrawal of the project.

4. Select **Continue**



Generating Unit Details

1. Select **Generating Unit Details**, if not currently selected
The **Generating Unit Details** screen displays
2. Select the **Add item button** under the **Existing and New Generator Information** header but above the table.
3. Select the Generator Status drop down list.
4. Select "New" or "Existing"
Complete the remaining fields.
5. On the right side of the Generating Unit Details Table (not the right menu) there is a button in line with each generator you add that says, "Additional Details". Select that to input the additional details for each generating unit. If your screen is zoomed in, you may need to scroll to the right to see it.
Note: You can add multiple lines, if needed by clicking "Add Item". For Paired Storage, please input the non-storage prime mover first, then note coupled storage within the "Additional Details" button.
6. If you do not input the Additional Details, you will see a lot of errors when you run the Self Review checklist validation.
7. Select "Submit" in "Additional Details" to close the popup.
Note: Complete the remaining fields under the table. Calculations related to any applicable study deposit will be run based off the values in the table below the Generating Unit Details table.
8. Select Continue

Additional Information

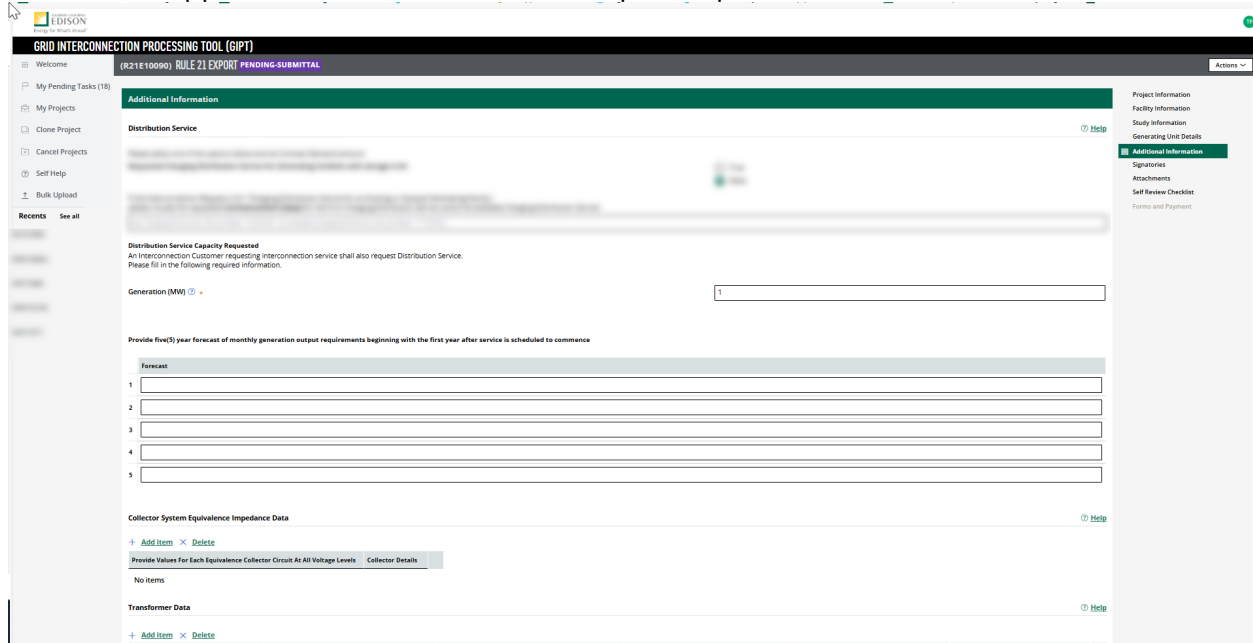


Note: Distribution Service is applicable for Rule 21 Export projects. The Distribution Service Request and associated Distribution Service Agreement is part of the main body of the Wholesale Distribution Access Tariff (WDAT), section 15.

To complete the Additional Information:

1. Complete the Distribution Service Request information.
2. Complete the Forecast
3. If there is a Collector System, please use the "Add Item" to input the Collector System Equivalence Impedance Data. There is a white "Update Details" button on the right of each line you add which will contains more fields that must be completed.
4. Submit your "Update Details" form popup for each collector line item, if applicable.
5. To input transformer data, click "Add Item" under the "Transformer Data" header. You may add multiple transformers. For each transformer, please be sure to click the white "Additional Details" button to the right of each line item and fill in & submit the popup form. If you do not add the additional details, you will see errors when you attempt to submit. If you do not see the "Additional Details" button, please scroll to the right.
6. Please fill in the remainder of the form as applicable to your project which includes:
 - a. Plant-Level Reactive Power Compensation Data
 - b. Uniform Limited Export
 - c. Limited Generation Profile
 - d. Interconnection Facilities Line Data (some of these fields may be required if your POI is >50kV, these will be marked with a red asterisk *****)
 - e. Cost Envelope Option

- i. Please review the tariff prior to making this selection, as this selection may impact deposits and timelines.
 - f. Estimated Versus Actual Cost Responsibility. While there is nothing to fill in here, please review the information.
 - g. Certified Power Control System
7. Once all applicable sections have been completed, please select "Continue".



Signatories

The Signatories Section drives our DocuSign integrations. The contact information you input into this section will determine where documents are sent for signature. Please ensure any signatory you list has authority to sign on behalf of the legal entity.

The following sections are available:

2. Interconnection Request Form – This section is mandatory. The Name of Legal Entity is typically the party that is submitting the Interconnection Request form and will match the entity that will be executing the agreements. However, over time, entities can change which is why the remaining Signatory sections are optional.
3. Detailed Study Agreement: If you are requesting a Detailed Study Process request, then this will be the signatory who will execute the Detailed Study Agreement in the future. It is optional at submittal but will need to be completed around the time of the scoping meeting.
4. Customer Non-Disclosure Agreement (NDA): This is sometimes needed including but not limited to: around the time of the scoping meeting, results meeting, or when certain programs are involved. This is not required for submittal but may be needed in the event an NDA is needed later.
5. Customer-Generator Interconnection Agreement (GIA)
This is not required at the time of the submittal of the Interconnection Request but will be needed around the time an agreement is to be executed for the DocuSign to work properly.

- Customer-Other Agreement- This isn't needed often but can be mapped to ad-hoc agreements triggered by the advisor, as necessary.



Note: Under each section is a checkbox asking if you wish to copy the signatory information from an above section. This is optional but is intended to save time if the information remains unchanged. Additionally, if you wish to have multiple signatories for a particular agreement, you may select "Add Item".

- Select "Continue" when the Signatories section is complete.

Attachments

The following attachments are required, or conditionally required:

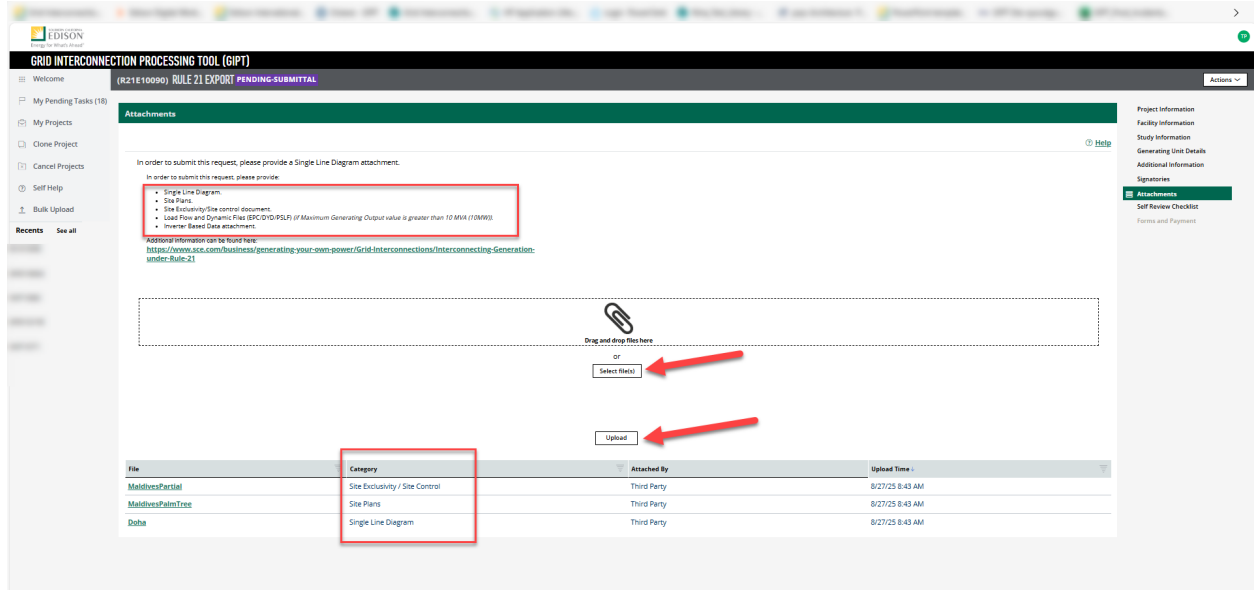
- Single Line Diagram.
 - Site Plans.
 - Site Exclusivity/Site control document.
 - Load Flow and Dynamic Files (EPC/DYD/PSLF) (*if Maximum Generating Output value is greater than 10 MVA (10MW)*).
 - Inverter Based Data attachment, when applicable
- You may Drag and Drop your files into the designated box or click "Select Files."
 - Once you have selected your file, please select the "Category".
 - Your files must be properly categorized in order for you to be able to submit the request. For example, if you do not categorize the Single Line Diagram as a Single Line Diagram, the system will not recognize that it has been attached, and it will prevent you from submitting the request.
 - Tip: If you click the menu, you can type "Single Line", and it will take you to the section

Note: Your filename should be short and not contain any special characters, or you will not be able to upload it. When there is an issue with the filename, a small triangle will show up in the field containing the filename.

- Once you have selected your files and categorized them you can do one of the following:
 - To the right of each file, you will see a trash icon, when you hover over it says, "Delete this row". Should you need to delete a file, please click. If you do not need

to delete, then disregard this note. If you do not see the icon, scroll your browser window to the right.

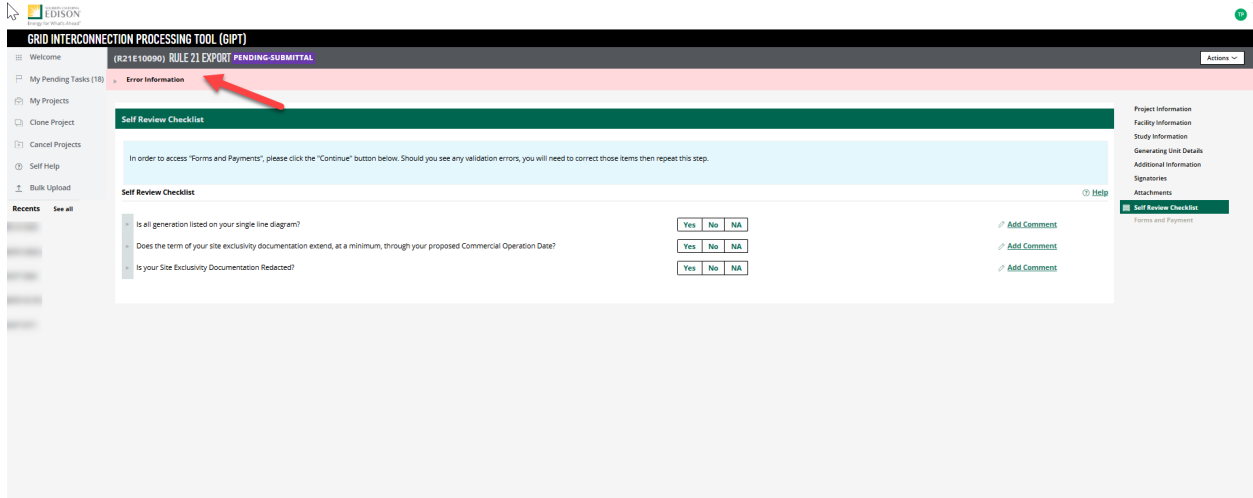
- b. Once your files are accurate and you have verified there are no warnings on the filename, click the white "Upload" button.
- c. Once all files are attached, click "Continue".



Self-Review Checklist

The Self Review Checklist is occasionally updated by SCE to identify frequently submitted deficiencies or other issues. These questions are optional; however, they are intended to help double check for certain items prior to submittal of the interconnection request. Please be aware of any pop-up text when you make a selection.

1. When you select "Continue", form validations will run. An Error banner may show up at the top of the form. Click on the "Error Information" banner to expand.
2. Each error will show the section of the form where the error is contained, then followed by the field label or item. For example, "Attachments- Single Line Diagram is mandatory" means you navigate to the Attachments section, and upload *and categorize* the "Single Line Diagram".
3. Once all errors are cleared, you may navigate back to the Self Review Checklist and click "Continue" to get to the "Forms and Payments" screen.



Forms and Payment

The 'Forms and Payment' section is where you can download a copy of the Rule 21 Export IR form, as well as the Distribution Service Request form.

If your project is Fast Track, you will see an option to pre-pay the Supplemental Review fee. This defaults to "No". If you believe your project will require Supplemental Review, you can switch the selection to "Yes" you will receive two invoices. Note that in the event you have prepaid Supplemental Review, and your project has failed Initial Review, you will not be offered a results meeting. The case will automatically progress to Supplemental Review.

At this time, online payments are not available for Rule 21 Export. You may send your payment via check or wire.

Under "Invoice Owner", we recommend selecting "Other" to input the name and address you wish to have displayed on the invoice(s). Click "Invoice" once you have completed the Invoice Owner details. You may then download your invoice (it will appear as a green hyperlink) and follow the instructions to submit payment.

An acceptable submittal should also include a signed Interconnection Request (IR) form. You have the option to e-Sign the form, or you may upload the signature page. If you opt for the e-sign, the signature request will go to the email address and person listed in the Signatories section, specifically the Interconnection Request form signatory. Once you initiate DocuSign for your request, you will no longer be able to make edits to the case. Should you need to make changes, you'll need to submit the case as-is and reach out to InterconnectionQA@sce.com so they can send you back a task to make corrections.

We are not currently accepting online payments for Rule 21 Export. You will need to follow the instructions on your generated invoice to submit payment via check or ACH. Once you have completed your Interconnection Request, please click "Finish".

Your case will then route to our Intake team for further review. Should they find any items that would prevent your project from being accepted for processing, they will send you an email. Once your request has been *accepted for processing*, you will receive a notice and your request will be assigned for the formal application review and deficiency cycles by the Southern California Edison subject matter experts.

Acceptability & Deficiency Responses

Should your case *data* require corrections, you will be sent a task in "My Pending Tasks". Once you open the task, you can make the requested edits.

You will have access to your case even when you don't have a task through "My Projects" or "Recents".

As a reminder, **SCE cannot review your responses until you submit any active task**. Should you run into any difficulties or unusual errors, please reach out to InterconnectionQA@sce.com. Once your application has been deemed complete and valid, the technical evaluation will begin.
