



Electric Sample Form No. 79-1202
Load Aggregation Appendix

Sheet 1

**Please Refer to Attached
Sample Form**

(Continued)

Advice 6050-E-A
Decision

Issued by
Robert S. Kenney
Vice President, Regulatory Affairs

Submitted March 9, 2021
Effective February 4, 2021
Resolution

LOAD AGGREGATION APPENDIX

(If Applicable)

**List of Qualifying Accounts Eligible for Net Energy Metering (NEM & NEM2)
Load Aggregation,
Load Aggregation Sizing Affidavit, and
Customer-Generator Declaration Warranting Load Aggregation Arrangement Is Located
On The Same or Adjacent or Contiguous Property to Generator Parcel**

This is an appendix to Schedules NEM and NEM2 involving load aggregation¹. As described in the special condition titled “Load Aggregation”, PG&E will aggregate the load of the Customer-Generator’s accounts listed below where the Customer-Generator is the customer of record and the accounts continue to meet the requirements as outlined in the Customer Declaration on the last page of this Appendix.

In accordance with this appendix and pursuant to the applicable net energy metering tariff:

- (i) The electricity generated by the Renewable Electrical Generation Facility (REGF) and exported to the grid shall be allocated to each of the aggregated meters in proportion to the electrical load served by those meters, and
- (ii) Customer-Generator shall remit the associated service charges to PG&E for its cost of providing billing service to those meters (one-time setup charge of \$25 per meter, no more than \$500, and an ongoing monthly charge of \$5 per meter, all billed on the generator account), and
- (iii) Customer-Generator shall permanently be ineligible to receive AB 920 Net Surplus electricity Compensation (NSC), and PG&E shall retain any kilowatt-hours (kWh) in excess of the eligible Customer-Generator’s electrical load as determined for each aggregated meter individually. However, if an Aggregated Account that is not a Generating Account is separated from the Arrangement, and subsequently qualifies for a net energy metering program, it may be eligible for NSC.

This agreement at all times shall be subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.

Net Energy Metering Aggregation Sizing Affidavit

For Net Energy Metering projects, the REGF size should be “intended primarily to offset part or all of the customer’s own electrical requirements.”² For NEM or NEM2, not including Load Aggregation, this means that the annual kilowatt-hours (kWh) produced by the REGF (e.g. solar system) should not exceed the kWh of annual usage associated with the PG&E meter at the Point of Interconnection. Annual usage is determined by referencing the previous 12 months of usage records for the meter, plus any additional kWh representing future additional usage.

For Load Aggregation, under NEM Aggregation (NEM2A), the REGF should be sized to produce no greater than the total annual kWh of all the aggregated meters within your Arrangement, plus any additional kWh representing future additional usage. The sizing determination should be based on recent annual usage of all the load accounts in the Arrangement plus additional usage for the Arrangement³ As stated above in (iii), NEM2A REGFs are not eligible for NSC. At the time of true-up, any Net Surplus

¹ Customers either requesting to take service on or are already taking service on Schedules NEM and NEM2 must complete this Appendix to apply for Load Aggregation or make changes to their existing Load Aggregation Arrangement. See the special condition titled “Load Aggregation” in the applicable net energy metering tariff.

² Per State Public Utilities Code Section 2827(a)(4)(A)

³ The Arrangement is defined as the aggregated (or “benefitting”) accounts and the single generating account loads, which may or may not have load.

Electricity⁴ that was produced by the REGF that was not attributed to an Aggregated Accounts (benefitting load accounts) within the Arrangement would not be compensated.

What size system do I need?

Some factors to consider when sizing your system are your project budget, return on investment expectations, current and future energy needs, and the location and amount of your property dedicated to the system.

To find additional resources, please visit <https://pge.wattplan.com/>

⁴ **Net Surplus Electricity** - (defined as all electricity generated by an eligible customer measured in kilowatt-hours over a Relevant Period – as defined in Special Condition 2.h of the NEM2 tariff – that exceeds the amount of electricity consumed by that eligible customer)

Completing this Appendix

This Load Aggregation appendix is composed of three sections where Applicants should complete the applicable Worksheet located in either Section I or II and sign the Customer-Generator Declaration (Section III). Please read through this entire Appendix (confirming your eligibility and request), complete the associated Worksheet on the following pages, and sign the Customer-Generator Declaration.

Sections (Identifying Your Request)

I. New Load Aggregation Requests Worksheet

- All new load aggregation requests and requests that do not meet the definition of either Conversion, Rearrangement or Change Party (as defined below) must complete the table in Section I
- All accounts in the Arrangement must be included in this table with the requested information. As described in the Net Energy Metering Aggregation Sizing Affidavit section above, customers with insufficient recent annual usage may include their estimated proposed future load in the “Annual kWh Load” column.
- If you are also requesting a new service for the Generator⁵, check the box below:
 - Yes, I am requesting a new service for the Generator

II. Rearrangement/Change Party Requests Worksheet

- Load aggregation requests that meet the criteria included in Section II and are requesting to do a Rearrangement or Change Party should only complete the table in Section II
- Rearrangement/Change Party requests are defined as follows:
 - i. **Conversion Requests:** A request by an existing NEM customer to enter into a Load Aggregation arrangement for the previously approved REGF. The REGF must not have been modified since the Permission to Operate was issued. The new Load Aggregation arrangement must have at least two load accounts.
 - ii. **Rearrangement Requests:** A request by the same customer of record to modify the aggregated accounts in an approved Load Aggregation arrangement (i.e. add and/or remove aggregated accounts). The new Load Aggregation arrangement must have at least two load accounts.
 - iii. **Change Party Requests:** A request to take over the generator account and at least two load accounts from the previously approved Load Aggregation arrangement. The request can only be made after the new owner has started service as the new customer of record for the applicable electric services (i.e. the services are in the new customer’s name). For assistance with this request, contact the Solar Customer Service Center at 877-743-4112.

⁵ For Load Aggregation arrangements requesting an additional service for Generator, subject to all other applicable rules, an additional service may be allowed for the Generating Account if it has no load other than that associated directly with the Renewable Electric Generation Facility. However, a customer may not subsequently add load to that additional service, and if the Renewable Electrical Generation Facility is removed, the additional service, may not be converted to a load account. Note: there must be at least two load accounts to be eligible for Load Aggregation.

Section I: New Load Aggregation Requests Worksheet (If Applicable)

Table 1: Load Information						
ACCOUNT ⁶	PARCEL NUMBER	ACCOUNT NAME ^{7 8}	SERVICE ADDRESS (Street, City, Zip Code – no P.O. boxes) ²	ELECTRIC SERVICE AGREEMENT NUMBER ²	ELECTRIC METER NUMBER ²	ESTIMATED ANNUAL KWH LOAD ⁹
SAMPLE 1 (New Service)	000-000-000	New	123 AG ST, Anywhere, 00000	New	New	5000
SAMPLE 2	111-111-111	John Doe	123 House ST, Anywhere, 00000	1111111112	2222222222	7000
REGF Load						
Load Acct 1						
Load Acct 2						
Load Acct 3						
Load Acct 4						
Load Acct 5						
Load Acct 6						
Load Acct 7						
Load Acct 8						
Load Acct 9						
Load Acct 10						
Total Estimated Annual kWh Load (100%) *						
<small>*Sum of all Annual KWH Load cells above</small>						

⁶ When required by an existing tariff (e.g. Schedule NEM2), any load aggregation account not on a Time-of-Use (TOU) rate at the time of Permission to Operate will be defaulted to an applicable TOU rate.

⁷ If this is a new account, enter NEW in this column,

⁸ As listed on your most recent Energy Statement

⁹ Provide the previous twelve (12) months of the current customer's recent annual usage (from the date of signature). The "previous 12 months" requirement has two exceptions: (1) Standard NEM (SNEM) projects who were sized appropriately at the time of PTO who later convert to SNEMA without increasing the generator size and (2) first-time (i.e. no previous PTO issued for the generator) SNEM Aggregation requests who have sufficient load at the time of application submittal. In the case of proposed future load and/or load that you may have recently added, place the sum (total annual kWh) of your current annual usage and your proposed annual usage increase as one value. When including proposed future load for a Load Account, all columns for that entry must have a value. If there is no load or proposed future load, place zero.

LOAD AGGREGATION APPENDIX

Table 1.2: Comparison of Aggregated Load kWh to Estimated Annual kWh Production		
Estimate of Total Aggregated Load	<p style="text-align: center;">100% of Total Estimated Annual kWh Load*</p> <p style="text-align: center; font-size: small;">*Use value from "Total Estimated Annual kWh Load (100%)" from table 1.1 above.</p>	
Estimate of Total Annual kWh Production	<p style="text-align: center;">Solar = CEC-AC¹⁰ rating X 1,500¹¹</p> <p style="text-align: center;">Wind = Total Inverter Nameplate Rating X 2,190¹²</p> <p style="text-align: center;">Other Technologies = Total Inverter Nameplate Rating X 7,008¹³</p>	
kWh production greater than load?	<p>Yes : If "Estimate of Total Annual kWh Production" is greater than "Estimate of Total Aggregated Load" = Yes. Applicant must downsize REGF kW.</p> <p>No: If "Estimate of Total Annual kWh Production" is less than "Estimate of Total Aggregated Load" = No. Project meets sizing to load limitation.</p>	

¹⁰ CEC-AC (kW) = California Energy Commission Alternating Current, refers to inverter efficiency rating (Quantity of PV Modules x PTC Rating of PV Modules x CEC Inverter Efficiency Rating)/1000

¹¹ Estimated Solar Production = 8,760 hrs/yr X 0.17123 solar capacity factor = 1,500

¹² Estimated Wind Production = 8,760 hrs/yr X 0.25 wind capacity factor = 2,190

¹³ Estimated Other Technologies = 8,760 hrs/yr X 0.80 other technologies capacity factor = 7,008

LOAD AGGREGATION APPENDIX

Section II: Rearrangement/Change Party Requests Worksheet (If Applicable)

Applicability

The Rearrangement/Change Party table below should only be completed in lieu of the table under Section I above if:

1. Your request complies with the definition of Rearrangement or Change Party (as described above),
2. You are submitting either a Rearrangement or Change Party Request, AND
3. The size of the generating facility connected to the Generator Account is not increasing¹⁴

Reminders

1. The new Load Aggregation arrangement must continue to meet all of the requirements specified in the Customer-Declaration section below to be approved.
2. As described earlier in this Appendix, overgeneration should be avoided.

Table 2.1: Conversion/Rearrangement/Change Party Requests Worksheet (If Applicable)					
ACCOUNT ¹⁵	PARCEL NUMBER	ACCOUNT NAME ^{16 17}	SERVICE ADDRESS (Street, City, Zip Code – no P.O. boxes) ²	ELECTRIC SERVICE AGREEMENT NUMBER ²	ELECTRIC METER NUMBER ²
SAMPLE 1	000-000-000	New	123 House ST, Anywhere, 00000	New	New
SAMPLE 2	111-111-111	John Doe	123 House ST, Anywhere, 00000	1111111112	2222222222
Generator					
Load Acct 1					
Load Acct 2					
Load Acct 3					
Load Acct 4					
Load Acct 5					
Load Acct 6					
Load Acct 7					
Load Acct 8					

(Use more sheets as necessary. Do not restate the Generator Account on additional sheets.) Page: ___ of ___

¹⁴ If the system size is increasing, you are ineligible to submit either a Rearrangement or Change Party request and must instead complete the table in Section I. Note: Any modifications to the generating facility connected to the Generator Account must submit a new interconnection application online.

¹⁵ When required by an existing tariff (e.g. Schedule NEM2), any load aggregation account not on a Time-of-Use (TOU) rate at the time of Permission to Operate will be defaulted to an applicable TOU rate.

¹⁶ If this is a new account, enter NEW in this column,

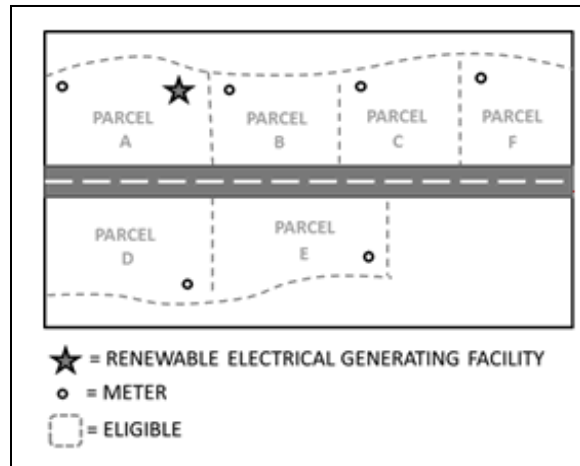
¹⁷ As listed on your most recent Energy Statement

Section III: Customer-Generator Declaration

I, Customer-Generator, represent and warrant under penalty of perjury that:

- 1) I have received and read this Appendix in its entirety, understand the importance of properly sizing the net energy metering generator, and agree to remit all charges associated with being billed on Load Aggregation; and
- 2) The total annual output in kWh of the generator is less than or equal to 100% of the annual aggregated electrical load in kWh of the meters within the arrangement, including the load on the generating account itself (before being offset by the generator), and including any estimated future additional load; and
- 3) All of the aggregated account meters associated with this generator account are located either on the property where the electrical generation facility is located or are located within an unbroken chain of contiguous parcels that are all solely owned, leased or rented by the customer-generator. For purposes of Load Aggregation, parcels that are divided by a street, highway, or public thoroughfare are considered contiguous, provided they are within an unbroken chain of otherwise contiguous parcels that are all solely owned leased or rented by the customer-generator.

For example, assume there are five parcels (A, B, C, D, E, and F) that form a cluster of contiguous parcels and D and E are separated from A, B, C and F by a street, highway, or public thoroughfare. For the purposes of participating in Load Aggregation, all five parcels are considered contiguous, provided they are otherwise contiguous, and all are solely owned, leased or rented by the customer-generator. Refer to the diagram on the right (for illustrative purposes only.)



- 4) I agree to notify PG&E if there is any change of status that makes any of the meters listed in this Appendix ineligible for Load Aggregation to ensure that only eligible meters are participating; PG&E will require an updated version of this Load Aggregation Appendix form; and

- 5) Upon request by PG&E, I agree to provide documentation that all aggregated meters meet the requirements of Load Aggregation including, but not limited to, parcel maps and ownership records.

Customer Generator's Name

Signature

Date

Print Name and title of signee, applicable if customer is a Company (e.g. John Doe, Manager)