



PSEG Long Island

Community Distributed Generation (“CDG”) Program

Procedural Requirements

Effective Date: April 1, 2016

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1. Introduction

On July 17, 2015 and October 16, 2015 the New York Public Service Commission (PSC or Commission) issued Orders in Case 15-E-0082 under which the policies, requirements and conditions for implementing Community Net Metering were established. (Community Net Metering is referred to as Community Distributed Generation (CDG) in all communications.)

The CDG Program has three main entities: the CDG Host; CDG Satellites; and the Authority. A CDG Host is the project sponsor and is responsible for owning or operating the generation facility, coordinating the project's interconnection and operation with the utility, and supervising and fostering cooperation among the project's Subscribers. CDG Satellites are the project subscribers and will own or contract for a proportion of the credits accumulated at the generation facility's meter, as a percentage of the facility's output in excess of usage on the CDG Host's account. The utility will be responsible for distributing the credits from the CDG Host's account in accordance with the sponsor's instructions.

This procedure may be amended from time to time based on experience, changes in PSC orders, including adoption or modification of Uniform Business Practices. In the event of any inconsistency between the rate schedule(s) or any PSC order of the above-mentioned requirements and this plan, the rate schedule(s) and PSC orders will govern.

2. Program Definitions

CDG Host: A Non-Residential customer who owns or operates electric generating equipment eligible for net metering under this Order and whose net energy produced by its generating equipment is applied to the accounts of other electric customers ("CDG Satellites") with which the CDG Host has a contractual arrangement regarding net metering credits.

CDG Host Anniversary Month: 12 months from the CDG Host's initial CDG bill period start date. The CDG Host Anniversary month can be modified once in the lifetime of the account.

CDG Host Annual Reconciliation: Annually, the CDG Host must distribute all excess credits in the anniversary month. Any credits remaining on the CDG Host's account at the end of the annual period will expire if not distributed. Credits on the CDG Host's account cannot be carried forward for distribution in a subsequent annual period.

CDG Satellites: An electric customer who receives net-metering credits from its CDG Host. This account is considered a NET meter customer and all tariff regulations apply as if a PV system was actually installed at the location.

Excess Generation: The electricity (kWh) supplied by the CDG Host to the Authority during the billing period that exceeds the electricity (kWh) supplied by the Authority to CDG Host.

Excess Generation: Undistributed excess generation remaining on the CDG Host's account from prior bill periods.

Net-Metered Generation Facility: A generation facility eligible for net metering in conformance with Public Service Law 66-j or 66-l and the rate schedule, limited in size consistent with those statutes, and located behind a Host meter serving a Non-residential Customer.

Non-residential Customer: For purposes of net-metering, a customer billed by the Company under a Service Classification (“SC”) other than SC 1.

3. CDG Host Eligibility Provisions

3.1 The CDG Host may be any single non-residential entity, including the generation facility developer, an energy service company (ESCO), a municipal entity such as a town or village, a business or not-for-profit corporation, a limited liability company, a partnership, or other form of business or civic association provided the CDG Host owns or operates electric generating equipment that is eligible for net metering pursuant to the rate schedule. The CDG Host is subject to Public Service Law Article 1 to the same extent as Energy Services Companies and similar energy supply providers interacting with the Utility. The CDG Host need not form separate entities to perform the separate roles and instead will be treated as structurally separate in each role.

3.2 CDG Hosts electing service must execute and submit to the Authority the required contract as set forth in LIPA’s Smart Grid Small Generator Standardized Interconnection Procedures (“SGIP”) (Pages 38-43).

3.3 CDG Hosts must operate in compliance with standards and requirements set forth in the SGIP and Application Process for New Distributed Generators 2 MW or Less Connected in Parallel with Utility Distribution Systems, and as set forth in the SGIP.

3.4 The CDG Host must be a Non-residential Customer with a Net-Metered Generation Facility eligible for net metering under Public Service Law 66-j or 66-l and the rate schedule .

3.5 The CDG Host must certify to the Authority, both prior to commencing net metered service under CDG and annually thereafter, that it has met the creditworthiness standards and other requirements established by the Commission and maintain such certifications and attestations in full force and effect throughout the term of self-certification in accordance with Appendix A of this CDG Program Procedural Requirement.

4. CDG Host Program Provisions

The CDG Host shall:

- 4.1** Comply with any and all requirements of the Public Service Commission and with the Authority's Tariff for Electric Service rate schedule, including but not limited to the terms and conditions of Net Metering for Customer-Generators.
- 4.2** Direct the CDG Satellite to contact the Utility, if the inquiry is specific to Utility service.
- 4.3** Obtain written authorization from a customer that is a prospective CDG Satellite to request and receive access to the customer's historical annual energy consumption. Upon request, certify that it has written authorization from the customer to request and receive the customer's historical consumption information.
- 4.4** Not request termination or suspension of the Authority's electric service to a CDG Satellite Account.
- 4.5** Submit to the Authority, at least sixty (60) calendar days before commencing net metered service under the CDG Program, a CDG Allocation Request Form (as found in Appendix B hereto) with each CDG Satellite's utility account number, name, and address, and the percentage (up to three decimal places of accuracy) of the CDG Host's net energy output to be allocated to each, as well as the percentage to be retained by the CDG Host. Enter into a written contract with each Subscriber. Upon submitting CDG Allocation Requests on behalf of its CDG Satellites to the Utility, the CDG Host is certifying it has entered into contracts with all of the Subscribers.

The CDG Host will submit the Application for Community Distributed Generation ("CDG") Service that includes the CDG Host's certification as to the following:

- 4.6** The CDG Host must serve a minimum of ten CDG Satellites, each billed under the Authority's electricity rate schedule. No CDG Satellite Account can have more than one CDG Host, participate in remote net metering, or have on-site generation.
- 4.7** No more than 40% of the Excess Generation of the CDG Host may serve CDG Satellites of 25 kW or greater (for those members collectively); provided, however, that the CDG Host may include each dwelling unit located within a multi-unit building and served indirectly as though it were a separate participant for determining whether the ten CDG Satellite minimum and 40% output limits are met.

4.8 Each CDG Satellite must take a percentage of the CDG Host's net-energy that amounts to at least a minimum of 1,000 kWh annually and may not exceed the CDG Satellite account's historic average annual kWh usage up to three years (or a forecast of consumption if no historical data exists). Each CDG Satellite Account is considered a NET meter customer even though a physical PV system is not installed at the location.

4.9 All CDG Satellite must be located within the Company's service territory and within the same NYISO zone as the CDG Host.

5. CDG Project Process

5.1 CDG Project Application: Complete and submit to the Authority the Standard Generation Interconnection Requirements document and follow the SGIP process. CDG Hosts will receive a project case number and final acceptance letter that will be required in order to obtain and register Subscribers.

5.2 CDG Self-Certification: Complete and submit to the Authority the application for self-certification found in Appendix A.

5.3 Historical Consumption Requests: Send a Secure Email to CommunityDistributedGeneration@pseg.com which includes the list of the prospective CDG Satellite utility account numbers for which historical consumption data is being requested. Please attach Appendix C for data requests. Any documents sent to the prescribed email server will include in the subject line the host's 10 digit account number at all times. Any request without the host 10 digit account number in the subject line may not be answered by PSEG Long Island. If the customer utility account number is invalid, there will be no data provided. It is important that the CDG Host verifies the account number and name with the customer as the Authority will not disclose the information otherwise. The Authority will provide the information via secure Email to the CDG Host containing available consumption data for the most recent annual period available. This data transfer method will be used initially until an automated file transfer process is established by the Authority or another method for such data transfer is implemented by the Authority.

5.4 Initial Allocation Request: Complete and submit an Initial Allocation Request using the Microsoft Excel spreadsheet format shown in Appendix B.

- If the Host account is an existing PV system submit application to CommunityDistributedGeneration@pseg.com.
- If the Host account does not have an existing PV system, submit the

application to PAMSolarLI@pseg.com.

- Initial Allocation Requests must be received by email a minimum of 60 days before commencing net metering service under CDG program. The CDG Host shall designate in its initial application for CDG service, the CDG Host Account and the CDG Satellite Accounts that will receive net metering service under CDG. PSEGLI will notify the CDG Host when submission of a complete and accurate Initial Allocation Request has been accepted by the Authority.
- Accepted Initial Allocation Requests will be effective commencing with the first full Host Account billing period 60 days after receipt of such request.
- Satellite allocations of Host Account Excess Generation should be specified in a percentage up to three decimal places of accuracy.
- Satellite allocations must total 100% or less. The percentage of Satellite allocations less than 100% will remain as Excess Generation at the CDG Host account.
- If less than 100% of the CDG Host Excess Generation is allocated by the CDG Host, the balance shall be retained on the CDG Host account, so that the full output of the CDG Host generation is allocated.

5.5 Subsequent Allocation Request: Complete and submit amended Allocation Requests using a Microsoft Excel spreadsheet format as shown in Appendix B to CommunityDistributedGeneration@pseg.com. Any documents sent to the prescribed email server will include in the subject line the host's 10 digit account number at all times. Any request without the host 10 digit account number in the subject line may not be answered by PSEG Long Island.

- After commencing net-metered service under the CDG Program, the CDG Host may modify its CDG Satellite Accounts and/or the percentage allocated to itself or one or more of its CDG Satellite Accounts once per CDG Host billing cycle by giving notice to the Authority no less than 30 days before the CDG Host Account's cycle billing date to which the modifications apply.
- The information contained in the Subsequent Allocation Request will follow the same request format, validation and submittal process as outlined in Initial Allocation Request.

- CDG Host must include all CDG Satellites allocations when submitting a revised distribution percentage for any of their CDG Satellites.
- Accepted requests will be effective with the first full Host bill period after 30 days of receipt of an accepted Allocation Request Accepted allocation requests for CDG Host.
- If the CDG Host does not submit a Subsequent Allocation Request, the Initial Allocation Request will be used by the Authority to allocate credits.

5.6 Annual Allocation Request: Complete and submit an Annual Allocation Request by using a Microsoft Excel spreadsheet format as shown in Appendix B. The allocation request must be received, each year, no less than 30 days before the 12-month anniversary of the CDG Host commencing CDG net-metered service. Appendix B must be submitted to CommunityDistributedGeneration@pseg.com. Any documents sent to the prescribed email server will include in the subject line the host's 10 digit account number at all times. Any request without the host 10 digit account number in the subject line may not be answered by PSEG Long Island.

- Once a year, following the annual anniversary of the CDG Host, after the CDG Host and all CDG Satellite Accounts have billed and credits allocated, the Authority shall supply the CDG Host any Excess Generation returned to the CDG Host and /or any Excess Generation remaining at the CDG Host, if applicable.
- Any excess credits are to be distributed to the CDG Satellites as directed in the Annual Allocation Request.
- No distribution will be made if an Annual Allocation Request is not received by the required date, and any undistributed credits on the CDG Host shall be forfeited. Satellite Account Closure:
- A CDG Satellite Account shall no longer receive credits after the Satellite Account's final bill is rendered.
- A CDG Satellite account shall no longer receive credits after the final bill is rendered on its account. Any remaining credit at the CDG Satellite account at the time its final bill is rendered will be purchased by the Authority as if the account were individually net metered.
- Account closures will be communicated via email to the CDG Host.

5.7 Satellite Account Number Changes:

- At times, the Authority may need to close an account number and create a new account number for the same customer. This excludes customer moves, in which case the customer will be assigned a new account number.
- In such case, the Authority will advise the CDG Host of the new account number and continue to credit the Satellite Account with the CDG Host's output using percent allocations previously assigned.

The Authority reserves the right to investigate/obtain proof that all CDG Satellite Accounts meet the requirements set forth above.

APPENDIX A

PSEGLI

CDG Host Certification Form

<input checked="" type="checkbox"/>	Initial CDG Host Certification
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- I certify that this CDG application will accept by all terms and conditions in the tariff for Community Distributed Generation, as they may be amended or superseded from time to time.
- I certify that the CDG Satellite Accounts with demands of 25kW or greater will receive, in aggregate, no more than 40 percent of the CDG Host's Excess Generation from the CDG project.
- I certify that each CDG Satellite Account is receiving at least 1,000 kWh annual but is not receiving credits in excess of the CDG Satellite Account's historic annually and may not exceed the CDG Satellite account's historic average annual kWh usage over the past two years (or forecast usage if historic data is not available).
- I certify that all CDG Satellite Accounts will be in the same NYISO Load Zone as the CDG Host and located in the Authority's service territory.
- I certify that the sponsor of this project will satisfy all obligations assumed with respect to Satellite Account owners (project members).
- To the best of my knowledge the information provided herein is accurate and no attempt has been made to misrepresent the facts.
- I will re-submit Appendix B certifications to PSEGLI on an annual basis.
- I have informed all CDG Satellite Accounts that they will be considered a NET customer and all PSEGLI Tariff regulations will apply as if the system was actually located at the CDG Satellite Account location.

Name of Applicant (Please print) _____

Host Utility Account Number _____

Signature _____

Date _____

Telephone _____

Email _____

- Affiliation to person responsible for account (Check one)
- Owner Partner Agent [Attach documentation of authorization by Principal] Corporate Officer
 - Other (specify) _____



APPENDIX B

PSEGLI APPLICATION FOR COMMUNITY DISTRIBUTED GENERATION (“CDG”) ALLOCATION REQUEST FORM

This CDG Allocation Request Form is for use in connection with PSEGLI’s CDG Generation Program as contained in the tariff for electric service Leaf No.34K to 34N.

1. CDG Host Account

PSEGLI Account Number:	
Account Name:	
Service Address:	
Mailing Address:	
City:	Zip:
Contact Name:	
Phone:	Email:

2. Requested Allocation to CDG Satellite Accounts

Check One:		Initial Allocation Request: must be submitted at least 60 days prior to the CDG Host Account commencing net metered service under the CDG Program.
		Subsequent Allocation Request: must be submitted no less than 30 days before the CDG Host Account’s cycle billing date to which the modifications apply.
		New PV Request: must be submitted to PAMSolarLI@pseg.com . It must follow all SGIP rules and regulations.
		Annual Request for Allocation of Excess Credits: must be submitted no less than 30 days before the 12-month anniversary of commencing CDG net metered service and is effective for a one-time allocation only. The most recent Initial Allocation Request or Subsequent Allocation Request , as applicable, will continue to apply to all on-going allocations thereafter.

	PSEGLI Host Account # (10 digits) XXX-XX-XXXX-X	PSEGLI Account Number (10 digits) XXX-XX-XXXX-X	PSEGLI Account Name	Cust Rate	Distribution Percentage (Distribution cannot Exceed 100%)
		XXX-XX-XXXX-X			%
1					%
2					%
3					%
4					%
5					%
6					%
7					%
8					%
9					%
10					%
11					%
12					%
13					%
14					%
15					%
16					%
17					%
18					%
19					%
20					%

PLEASE NOTE: THE FORMAT SPECIFIED ABOVE IS FOR INFORMATIONAL PURPOSES ONLY. ALL SATELLITE ACCOUNT INFORMATION SHALL BE FORWARDED TO THE AUTHORITY IN AN EXCEL SPREADSHEET AND INCLUDE ALL OF THE INFORMATION ABOVE.

3. Accepted and Agreed

CDG Host:	
Name:	Title:
Signature:	Date:

This CDG Allocation excel sheet is for use in connection with PSEGLI’s CDG Generation Program as contained in the electric tariff for electric service Leaf No.34K to 34N. This document should be provided every month 60 days prior to the effective start date and submitted to CommunityDistributedGeneration@pseg.com. Any documents sent to the prescribed email server will include in the subject line the host’s 10 digit account number at all times. Any request without the host 10 digit account number in the subject line may not be answered by PSEG Long Island. If there are no changes, the document should represent “No change” for each account in the customer status column.

1. Example of excel sheet filled in

	A	B	C	D	E	F	G	H
1	Host Account Number	Host Account Service Rate	Satellite Account Number	Satellite Service Rate	Customer Name	Percentage Allocation	Effective Start Date	CustomerStatus
2	9999999990	285	1234567890	180	John Smith	5%	05/01/2016	No Change
3	9999999990	285	1234567891	180	John Smith	10%	05/01/2016	Modified
4	9999999990	285	1234567892	180	John Smith	11%	05/01/2016	Removed
5	9999999990	285	1234567893	180	John Smith	2%	05/01/2016	No Change
6	9999999990	285	1234567894	180	John Smith	1%	05/01/2016	Modified
7	9999999990	285	1234567895	180	John Smith	15%	05/01/2016	Modified
8	9999999990	285	1234567896	280	John Smith	6%	05/01/2016	Modified
9	9999999990	285	1234567897	280	John Smith	20%	05/01/2016	Modified
10	9999999990	285	1234567898	281	John Smith	20%	05/01/2016	Modified
11	9999999990	285	1234567899	285	John Smith	10%	05/01/2016	Modified
12	9999999990	285	1234567999	180	John Smith	11%	05/01/2016	New

2. Excel Sheet Definitions:

Host Account Number: A Non-Residential customer who owns or operates electric generating equipment eligible for net metering under this Order and whose net energy produced by its generating equipment is applied to the accounts of other electric customers (“CDG Satellites”) with which the CDG Host has a contractual arrangement regarding net metering credits.

Host Account Service Rate: The rate classification for the host meter.

Satellite Account Number: An electric customer who receives net-metering credits from its CDG Host.

Satellite Service Rate: The rate classification for the satellite meter.

Satellite Customer Name: Name of the Satellite Customer

Satellite Customer Email Address: Email Address of the Satellite Customer

Percentage Allocation: The % of electricity (kWh) supplied by the CDG Host. The total percentage for this column shall not exceed 100%.

Effective Start Date: The date the percentage allocation takes effect. Note this must be the first of the month.

Customer Status: The overall status of this account as it relates to the host account.

Modified – Contractor Modified percentage allocation

New – Contractor added a new customer to the host allocation

No change – Contractor had No change in percentage allocation

Removed – Contractor removed account from the host allocation

APPENDIX C

PSEGLI APPLICATION FOR COMMUNITY DISTRIBUTED GENERATION (“CDG”) ALLOCATION REQUEST FORM

This CDG Allocation Request Form is for use in connection with PSEGLI’s CDG Generation Program as contained in the electric tariff for electric service Leaf No.34K to 34N.

1. CDG Host Account

PSEGLI Account Number:	
Account Name:	
Service Address:	
Mailing Address:	
City:	Zip:
Contact Name:	
Phone:	Email:

2. Requested Allocation to CDG Satellite Accounts

Check One:	<input checked="" type="checkbox"/>	Data Request: must be submitted to CommunityDistributedGeneration@pseg.com
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	PSEGLI Host Account # (10 digits) XXX-XX-XXXX-X	PSEGLI Account Number (10 digits) XXX-XX-XXXX-X	PSEGLI Account Name	Cust Rate	Distribution Percentage (Distribution cannot Exceed 100%)
		XXX-XX-XXXX-X			%
1					%
2					%
3					%
4					%
5					%
6					%
7					%
8					%
9					%
10					%
11					%
12					%
13					%
14					%
15					%
16					%
17					%
18					%
19					%
20					%

PLEASE NOTE: THE FORMAT SPECIFIED ABOVE IS FOR INFORMATIONAL PURPOSES ONLY. ALL SATELLITE ACCOUNT INFORMATION SHALL BE FORWARDED TO THE AUTHORITY IN AN EXCEL SPREADSHEET AND INCLUDE ALL OF THE INFORMATION ABOVE.

3. Accepted and Agreed

CDG Host:	
Name:	Title:
Signature:	Date:

This CDG Historical excel sheet is for use in connection with PSEGLI’s CDG Generation Program as contained in the electric tariff for electric service Leaf No.34K to 34N. This document should be submitted to CommunityDistributedGeneration@pseg.com. Any documents sent to the prescribed email server will include in the subject line the host’s 10 digit account number at all times. Any request without the host 10 digit account number in the subject line may not be answered by PSEG Long Island.

2. Example of excel sheet filled in

	A	B	C	D	E	F	G
1	Host Account Number	Host Account Service Rate	Satellite Account Number	Satellite Service Rate	Satellite Customer Name	Satellite CustomerEmailAddress	CustomerStatus
2	9999999990	285	1234567890	180	John Smith	John.Smith@aol.com	Data Request
3	9999999990	285	1234567891	180	John Smith	John.Smith@aol.com	Data Request
4	9999999990	285	1234567892	180	John Smith	John.Smith@aol.com	Data Request
5	9999999990	285	1234567893	180	John Smith	John.Smith@aol.com	Data Request
6	9999999990	285	1234567894	180	John Smith	John.Smith@aol.com	Data Request
7	9999999990	285	1234567895	180	John Smith	John.Smith@aol.com	Data Request
8	9999999990	285	1234567896	280	John Smith	John.Smith@aol.com	Data Request
9	9999999990	285	1234567897	280	John Smith	John.Smith@aol.com	Data Request
10	9999999990	285	1234567898	281	John Smith	John.Smith@aol.com	Data Request
11	9999999990	285	1234567899	285	John Smith	John.Smith@aol.com	Data Request
12	9999999990	285	1234567999	180	John Smith	John.Smith@aol.com	Data Request

3. Excel Sheet Definitions:

Host Account Number: A Non-Residential customer who owns or operates electric generating equipment eligible for net metering under this Order and whose net energy produced by its generating equipment is applied to the accounts of other electric customers (“CDG Satellites”) with which the CDG Host has a contractual arrangement regarding net metering credits.

Host Account Service Rate: The rate classification for the host meter.

Satellite Account Number: An electric customer who receives net-metering credits from its CDG Host.

Satellite Service Rate: The rate classification for the satellite meter.

Satellite Customer Name: Name of the Satellite Customer

Satellite Customer Email Address: Email Address of the Satellite Customer

Customer Status: The overall status of this account as it relates to the host account.

Data Request – Historical data request