



**Electric Sample Form No. 79-1202-03**  
Load Aggregation Appendix

Sheet 1

(N)

(N)

**Please Refer to Attached  
Sample Form**

(Continued)

*Advice* 7149-E  
*Decision* D.23-11-068

*Issued by*  
**Shilpa Ramaiya**  
*Vice President*  
*Regulatory Proceedings and Rates*

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*Effective* February 15, 2024  
*Resolution* \_\_\_\_\_

## LOAD AGGREGATION APPENDIX

(If Applicable)

**List of Qualifying Accounts Eligible for Net Billing Tariff (NBT)  
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 Schedule NBT involving load aggregation<sup>1</sup>. 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 Net Billing 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,
- (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),
- (iii) Aggregation net billing customers shall comply with Electric Rule No.21 Sections L.2 – L4 and Section L.7 for interconnecting to the electrical grid. Interconnection fees apply and remain as identified in Electric Rule 21, and
- (iii) Eligibility for Net Surplus Compensation is as stated in the Net Billing Tariff Load Aggregation section.

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 Billing Tariff Aggregation Sizing Affidavit**

The Generating Facility should be sized such that its total annual output in kWh is primarily used to offset the customer's own annual electrical requirements (this includes all usage from the aggregated meters within the arrangement plus any additional kWh representing future additional usage). The NBT Customer is allowed to oversize their Generating Facility for future load (i.e., electric vehicle, or other electrical appliances to support electrification) by executing the NBT Oversized Generating Facility Attestation within the applicable NBT Interconnection Agreement.

### **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.

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<sup>1</sup> Customers either requesting to take service on or are already taking service on Schedule NBT 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 Net Billing Tariff.

## 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 Billing Tariff 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 Generator<sup>2</sup>, 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 NBT 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.

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<sup>2</sup> 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.

# LOAD AGGREGATION APPENDIX

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

<b>Table 1: Load Information</b>						
ACCOUNT <sup>3</sup>	PARCEL NUMBER	ACCOUNT NAME <sup>4 5</sup>	SERVICE ADDRESS (Street, City, Zip Code – no P.O. boxes) <sup>2</sup>	ELECTRIC SERVICE AGREEMENT NUMBER <sup>Error!</sup> <small>Bookmark not defined.</small>	ELECTRIC METER NUMBER <sup>Error!</sup> <small>Bookmark not defined.</small>	ESTIMATED ANNUAL KWH LOAD <sup>6</sup>
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						
NBTA Total Estimated Annual kWh Load (150%) *						
<i>NBTA customers that executed the NBT Oversized Generating Facility Attestation within the applicable NBT</i>						

<sup>3</sup> When required by an existing tariff (e.g. Schedule NBT), 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.

<sup>4</sup> If this is a new account, enter NEW in this column,

<sup>5</sup> As listed on your most recent Energy Statement

<sup>6</sup> 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		
<b>Estimate of Total Aggregated Load (NBTA)</b>	<p style="text-align: center;">Up to 150% of Total Estimated Annual kWh Load*</p> <p style="text-align: center;"><i>NBTA customers that executed the NBT Oversized Generating Facility Attestation within the applicable NBT Interconnection Agreement are allowed to oversize up to 150% of the Total Annual kWh</i></p> <p style="text-align: center;"><small>*Use value from "Total Estimated Annual kWh Load" from table 1.1 above.</small></p>	
<b>Estimate of Total Annual kWh Production</b>	<p style="text-align: center;"><b>Solar</b> = CEC-AC<sup>7</sup> rating X 1,500<sup>8</sup></p> <p style="text-align: center;"><b>Wind</b> = Total Inverter Nameplate Rating X 2,190<sup>9</sup></p> <p style="text-align: center;"><b>Other Technologies</b> = Total Inverter Nameplate Rating X 7,008<sup>10</sup></p>	
<b>kWh production greater than load?</b>	<p>Yes : If "Estimate of Total Annual kWh Production" is greater than "Estimate of Total Aggregated Load" = Yes. Applicant must downsize REGF kW. Unless the customer is NBTA and executed the NBT Oversized Generating Facility Attestation within the applicable NBT Interconnection Agreement and it is within applicable limit.</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>	

<sup>7</sup> 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

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

<sup>9</sup> Estimated Wind Production = 8,760 hrs/yr X 0.25 wind capacity factor = 2,190

<sup>10</sup> Estimated Other Technologies = 8,760 hrs/yr X 0.80 other technologies capacity factor = 7,008

# LOAD AGGREGATION APPENDIX

## Section II: Rearrangement/ Requests Worksheet (If Applicable)

Applicability

The Rearrangement 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 (as described above),
2. You are submitting either a Rearrangement Request, AND
3. The size of the generating facility connected to the Generator Account is not increasing<sup>11</sup>

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.

<b>Table 2.1: Conversion/Rearrangement/ Requests Worksheet (If Applicable)</b>					
ACCOUNT <sup>12</sup>	PARCEL NUMBER	ACCOUNT NAME <sup>13 14</sup>	SERVICE ADDRESS (Street, City, Zip Code – no P.O. boxes) <sup>2</sup>	ELECTRIC SERVICE AGREEMENT NUMBER <sup>2</sup>	ELECTRIC METER NUMBER <sup>2</sup>
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 \_\_\_

<sup>11</sup> If the system size is increasing, you are ineligible to submit a Rearrangement 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.

<sup>12</sup> When required by an existing tariff (e.g. Schedule NBT), 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.

<sup>13</sup> If this is a new account, enter NEW in this column,

<sup>14</sup> As listed on your most recent Energy Statement

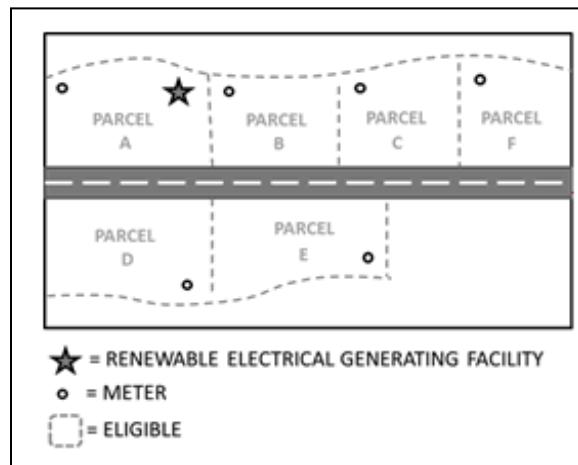
Note: In case of non-residential change of party, when the account-holding entity continues to be majority controlled by the same underlying individuals or entities from the time the legacy system was installed by the original customer then the change of party customer can utilize this form for rearrangement request.

## 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 Generating Facility should be sized such that its total annual output in kWh is primarily used to offset the customer's own annual electrical requirements (this includes all usage from the aggregated meters within the arrangement plus any additional kWh representing future additional usage). The NBT Customer is allowed to oversize their Generating Facility for future load (i.e., electric vehicle, or other electrical appliances to support electrification) by executing the NBT Oversized Generating Facility Attestation within the applicable NBT Interconnection Agreement; 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)