# Energy Storage Preliminary Monitoring Plan

This document is intended to assist SGIP applicants meet the requirements of the Preliminary Monitoring Plan (PMP) and allow the Program Administrators to determine project eligibility. Applicants are encouraged to use this template to satisfy the PMP requirement. Please see Required Documentation for Reservation Request in the SGIP handbook for more information on the PMP.

**Please complete the following:**

Project Site Address:

Host Customer:

System Owner:

Developer:

Storage Make/Model:

Paired with and charging at least 75% from onsite renewables (See question 9)

**Please select project type:**

Residential Energy Storage

Non-Residential Storage (<30 kW)

Non-Residential Storage (≥30 kW) (See additional questions 11-13)

**For all projects, please provide the following information:**

1. Describe the proposed system; include batteries, inverters, major system components, and their make/model, and quantities.
2. Describe the intended system operation and primary use case at the project site. (In other words, what specific service(s) will the storage system provide to the customer?)
3. Is there a “back-up only” setting or operational mode available for the storage system, whereby the system will only discharge in the event of a grid outage?

Yes

No

If yes, please explain how you are ensuring that this project will meet SGIP operational requirements, notwithstanding the “back-up only” option, over the 10-year permanency period:

1. Please provide a brief description of the existing load at the Site. Describe the source of the fuels that will be displaced by operation of the system (For example, electricity or natural gas provided by the utility).
2. Insert a simplified system layout of identifying major components and the proposed metering points at the project site.
3. Describe the metering components of the system, data to be collected at metering points, reasoning behind selected metering locations, and a description of the data acquisition system.
4. Describe the approach for collecting, storing and transferring operational data to the program. Describe the monitoring data source, frequency for collecting data, and the system’s data storage capabilities.
5. List the make and model of any external meters, PBI meters or energy management systems to be installed that will log and transmit operational data.
6. **For projects paired with and charging ≥75% from onsite renewables, please provide the following information:** How will the system charge at least 75% from onsite renewables? Describe the anticipated charge/discharge schedule and/or control approach of the storage system and operational mode(s) to be deployed for this project site.
7. Who will be responsible for transmitting operational data to the program?

**For non-residential projects 30kW+, please provide the following information:**

1. Are the meters listed on the [CEC Solar Equipment list](https://solarequipment.energy.ca.gov/Home/MeterList)?

Yes

No

1. Performance Data Provider (PDP)
2. How will the storage system’s operational data be transferred to the PDP for monthly reporting?