

## **Self-Generation Incentive Program Residential Energy Storage Eligibility Affidavit**

The Self-Generation Incentive Program (SGIP) offers incentives for qualifying energy storage projects that meet Program goals. This affidavit applies to all residential energy storage systems, whether stand-alone or paired with distributed generation. This Affidavit is designed to ensure that SGIP-incentivized projects will “increase deployment of distributed generation and energy storage systems to facilitate the integration of those resources into the electrical grid, improve efficiency and reliability of the distribution and transmission system, and reduce emissions of greenhouse gases, peak demand, and ratepayer costs.”<sup>1</sup>

Back-up<sup>2</sup> systems intended solely for emergency purposes are not eligible for SGIP incentives. The eligibility requirements in this Affidavit have been developed to ensure that all residential energy storage systems participating in the SGIP will be used for more than just back-up emergency purposes.

This Affidavit must be signed by both the residential energy storage system Host Customer and residential energy storage System Owner in order to receive an SGIP incentive. All Host Customers and System Owners must comply with all requirements. Should a Host Customer or System Owner fail to operate 95% of all incentivized systems<sup>3</sup> (or a single system if only one Project has been incentivized) according to the requirements outlined below, or fail to provide the required data to the Program Administrators, this may be considered an infraction, and both parties may be subject to the conditions described in Section 9 of the SGIP Handbook.

### **Requirements of Host Customers and System Owners:**

- The energy storage system owner and/or Host Customer have the tools to control the usage of the energy storage system when operating in parallel with the grid.
- Provide performance data to the Program upon request (emailed, zipped file of 15 minute interval data) for a period of five (5) years.
- Pass the energy storage Field Verification Inspection.

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<sup>1</sup> Senate Bill 861, Chapter 35 SEC 156 (a) (1) pp. 151, and Public Utilities Code (PUC) 379.6

<sup>2</sup> **Backup Generators:** Operate as short-term temporary replacement for electrical power during periods of Electric Utility power outages. In addition to emergency operation they ordinarily only operate for testing and maintenance. Backup generators do not produce power to be sold or otherwise supplied to the grid or provide power to loads that are simultaneously serviced by the Electric Utility grid. Backup generators only service customer loads that are isolated from the grid either by design or by manual or automatic transfer switch.

<sup>3</sup> 95% of systems paid for by the same Program Administrator and calculated on an ongoing basis

- Host Customer and/or System Owner are required to discharge the energy storage system a minimum of 52 full discharges per year. A “full discharge” is the equivalent of discharging the SGIP-incentivized energy capacity, whether it is during a single or multiple discharges.
- Fulfill either of the two following conditions:
  - Option A: the Host Customer is on a TOU tariff, dynamic tariff (e.g. PG&E’s SmartRate or SDG&E’s Reduce Your Use), or agrees to integrate load through the California Independent System Operator’s Proxy Demand Response, or equivalent tariff, prior to receiving the SGIP incentive and for five (5) years thereafter. Note that in the event that the Host Customer changes to a non-TOU tariff or is no longer enrolled in a demand reduction program, the energy storage System Owner is required to notify the Program Administrator within 30 days of change, and will be subject to Option B for the required five year period.
  - Option B: the Host Customer and/or System Owner agrees, for a minimum period of five (5) years, to discharge the energy storage system in an amount equivalent to 52 complete cycles per year of the incentivized energy capacity, which is defined as two hours of discharge at the SGIP incentivized power capacity rating, with discharges occurring during peak hours or peak day events (such as those called by PG&E’s SmartRate program or SDG&E’s Reduce Your Use), of the applicable IOU service territory.

### **Data Provision Requirements for Energy Storage Projects**

System Owners and Host Customers agree to participate in Measurement and Evaluation (M&E) activities as required by the CPUC for five (5) years. These activities will be performed by the Program Administrator (PA) or the PAs’ independent third-party consultant and include, but are not limited to the development of an M&E monitoring plan, installation of metering equipment or review/inspection of metering equipment installed by the project developer or host site, collection and transfer of data from installed system monitoring equipment, whether installed by Host Customer, System Owner, a third party, or the PA. The metering equipment that is part of the device may be used.

Data requirements for energy storage project eligibility consist of the following:

- Data shall be provided to SGIP PAs within fifteen (15) days of the request of the PA
- Data reports shall include:

- Identification of date and time period associated with each charge and discharge event during the requested reporting period.
- Measured power and energy, metered on the AC side of the installed system (for AC systems), for each charge and discharge event.

Host Customer Address \_\_\_\_\_

System Owner \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Host Customer (if not System Owner) \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_