
Self-Generation Incentive Program (SGIP)

Quarterly Workshop

Friday, December 15th 2017

PG&E's Pacific Energy Center, San Francisco, CA

Hosted by Pacific Gas & Electric Company (PG&E), SoCalGas, Southern California Edison (SCE), and Center for Sustainable Energy (CSE)



Introductions

SoCalGas: Rosie Magana, Laura Crump, Adrian Martinez

CSE: Rebecca Feuerlicht, Andi Woodall, Alex Kaufman, Joe Bick,
Alejandra Belalcazar

SCE: Jim Stevenson

PG&E: Brian Bishop, Ron Moreno

AESC: Dara Salour, Ron Ishii

Energy Solutions: Andrea Vas, Jason Huffine



Agenda

- **Welcome and Introductions**
- **Safety and Housekeeping**
- **Program Adoption Data**
- **New Developer Definition and Application**
- **New Equity Budget**
- **Energy Solutions Topics**
- **Inspection Sampling Protocol & Field Inspection Protocol**
- **Stakeholder Questions**



Safety & Housekeeping

Safety

- CPR Trained?
- Earthquake – duck and cover
- AED
- Emergency Exits

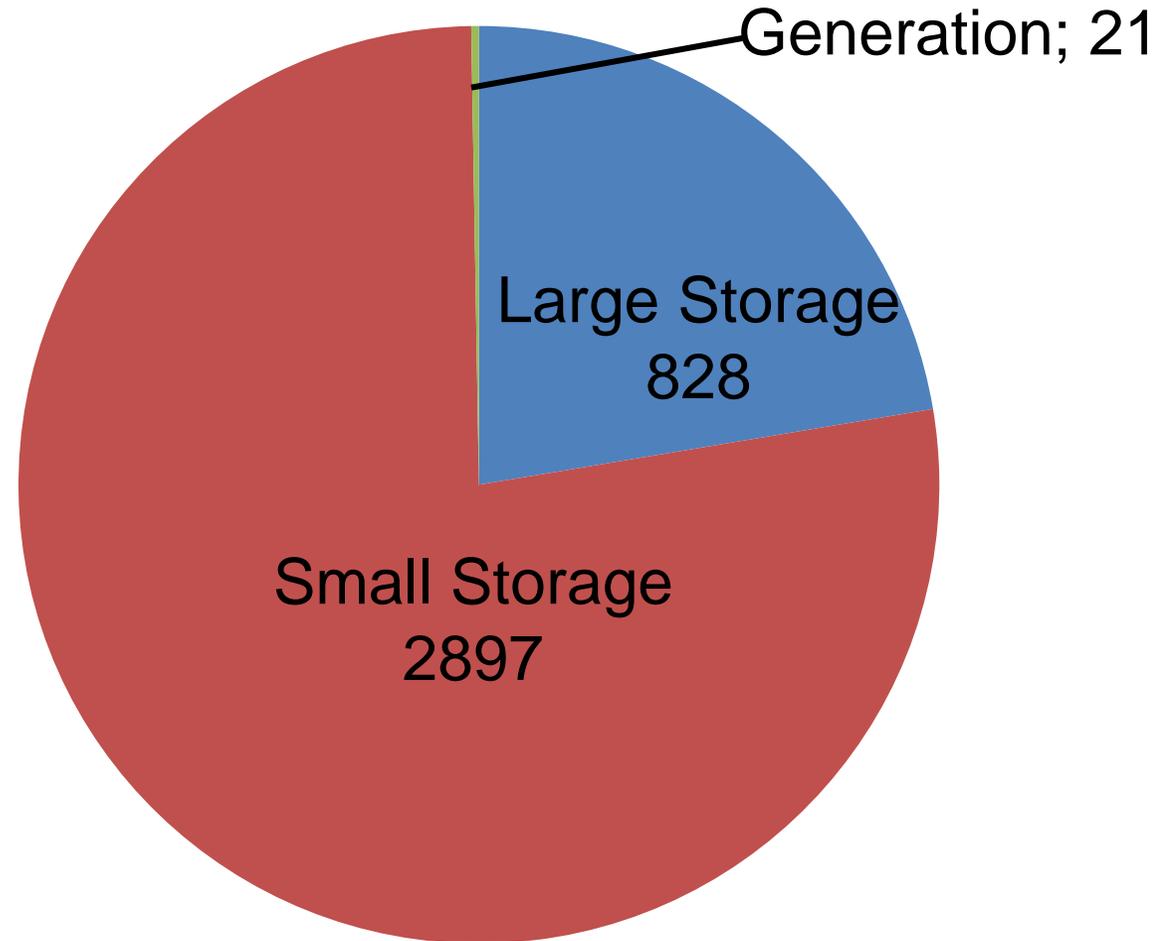
Housekeeping

- Bathrooms
- Garbage, recycling
- Beverages



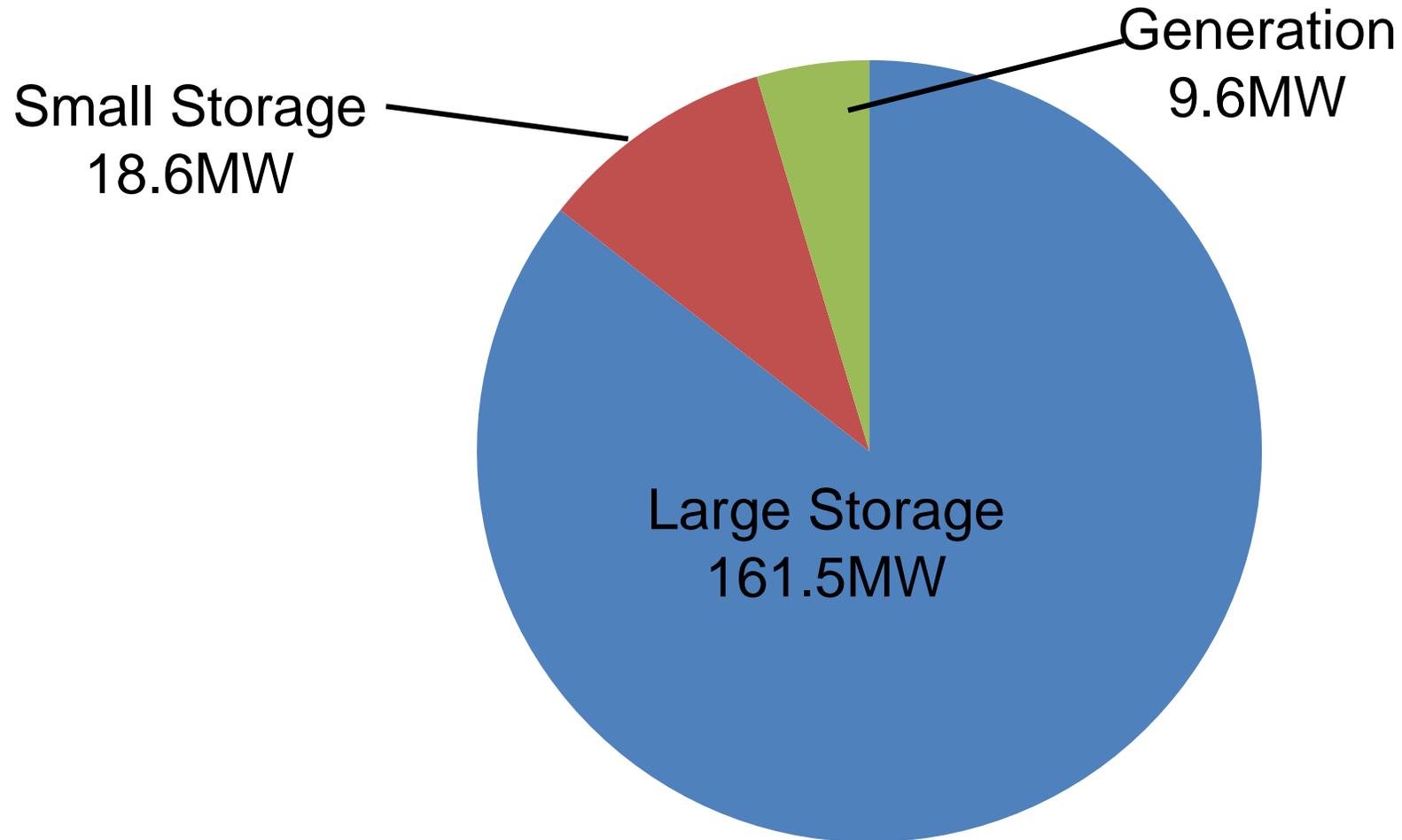
Program Adoption Data: 2017 Application Volume

Total 2017 Applications: 3746



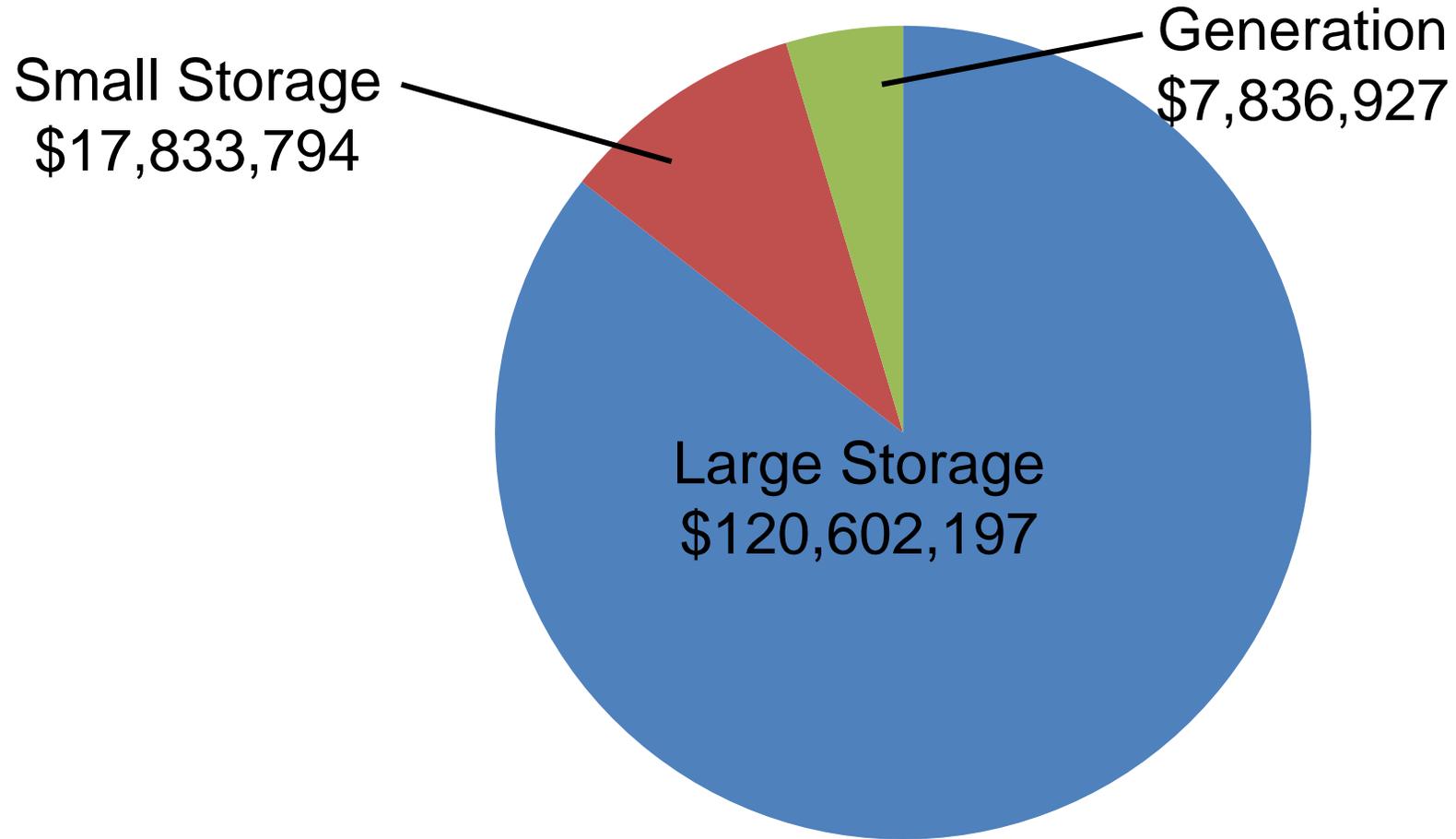
Program Adoption Data: 2017 Application Capacity

Total 2017 Application Capacity (MW): 189.7MW



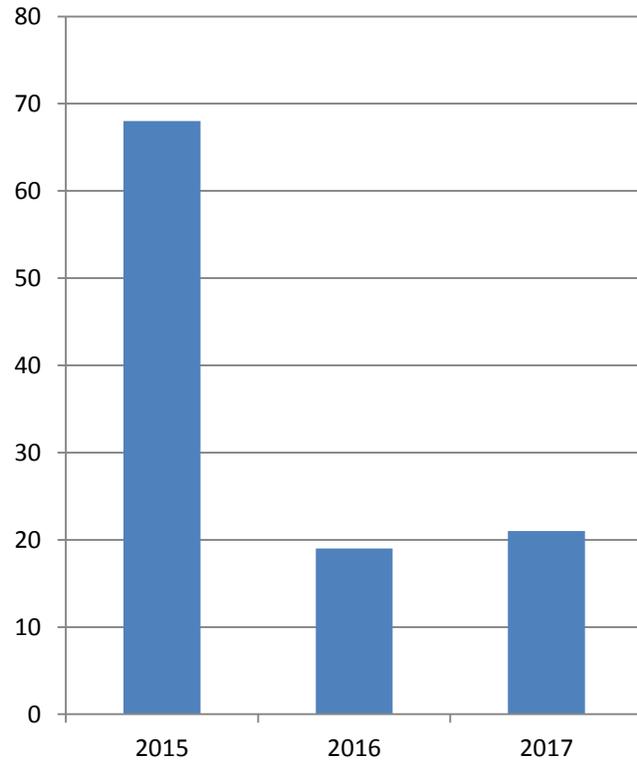
Program Adoption Data: 2017 Application Incentives

Total 2017 Application Incentives (\$): 146,272,918

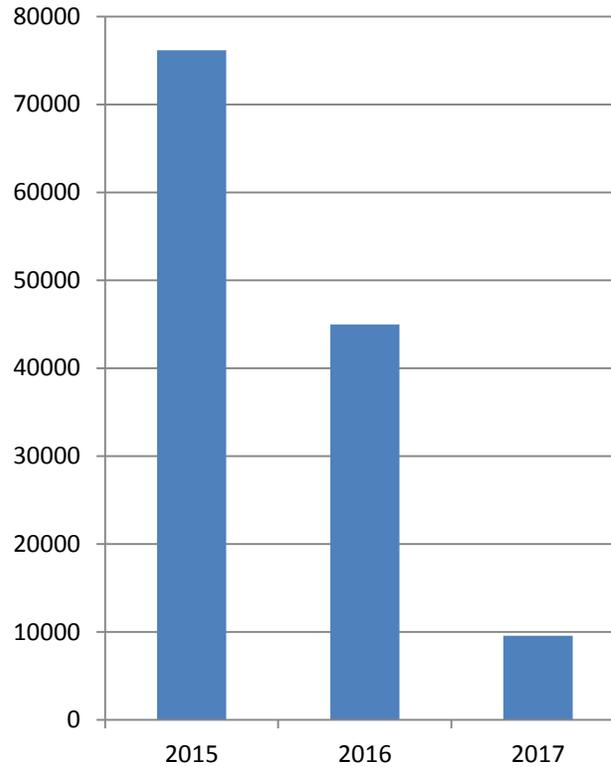


Generation Projects: 2015 – 2017 Data

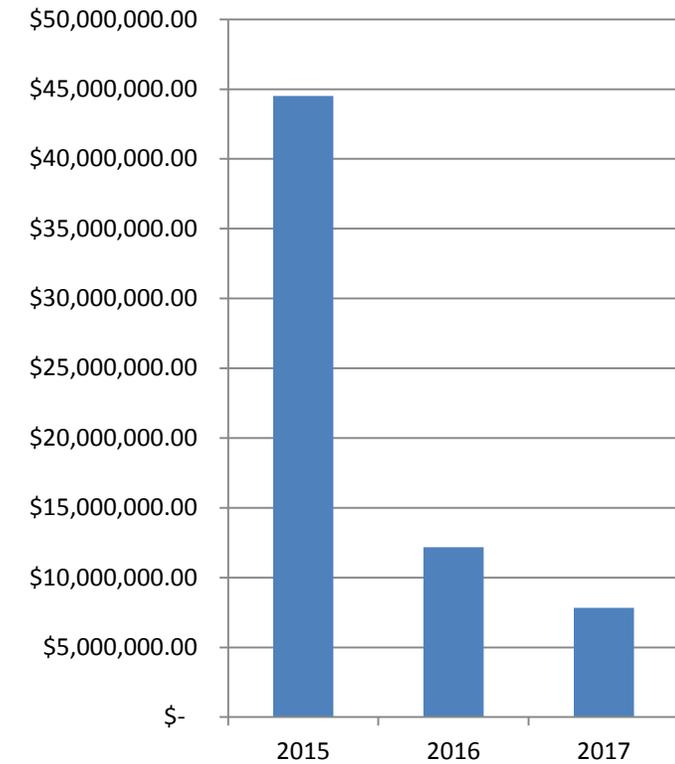
Applications



Capacity

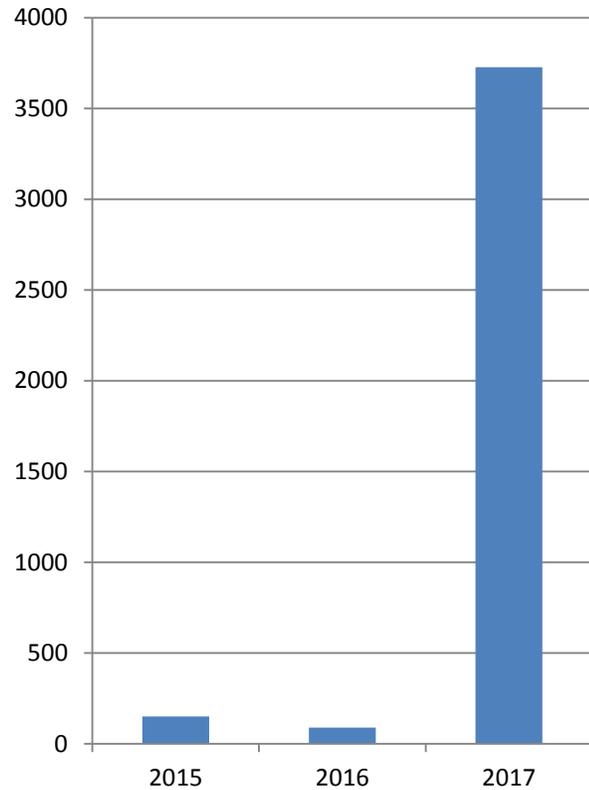


Incentives

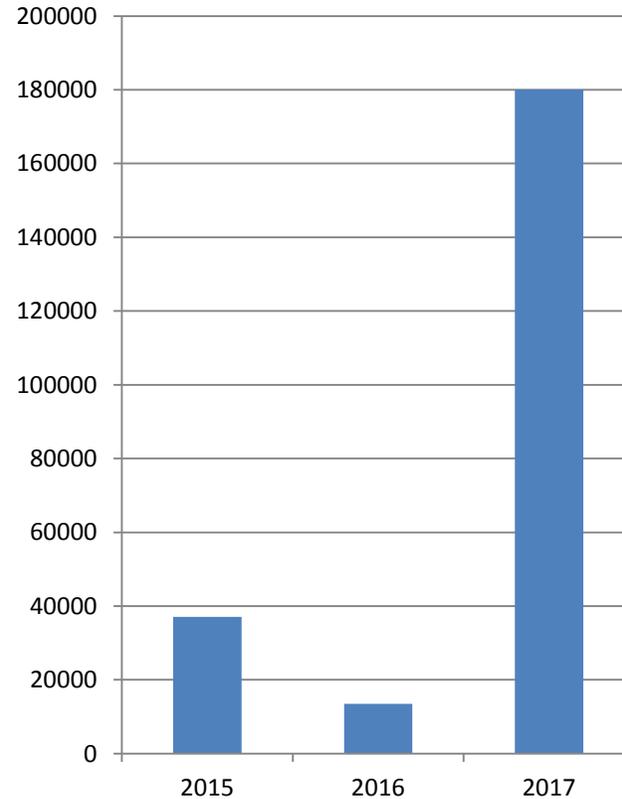


Storage Projects: 2015 – 2017 Data

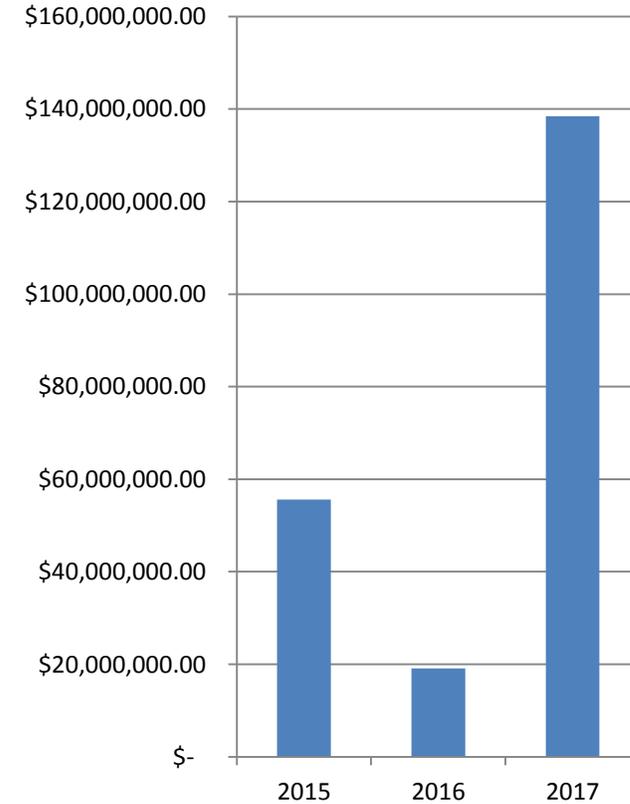
Applications



Capacity



Incentives



New Developer Definition and Application

October 13, 2017: CPUC issues Resolution E-4887 adopting revised definition of "developer" for the purpose of the SGIP developer cap.

- Modifies Developer definition for applications received in Step 3 or later.
- Provides an exclusive list of a project's development activities.
- Requires PAs to file Tier 1 advice letter that ensures compliance with Resolution

October 26, 2017: SGIP Program Administrators filed a joint Advice Letter 3682-E implementing Resolution E-4887.

- Proposed modification to the SGIP Handbook.

November 21, 2017: CPUC approves Advice Letter 3682-E / SGIP Handbook revisions.

- Effective date October 26,2017.



New Developer Definition and Application

New Developer Definition:

“A Developer is, if not individual homeowners applying for SGIP incentives for systems located on their own property, the corporate entity registered and in good standing with the Secretary of State of California, that handles a substantial amount of the project’s development activities.”

- Homeowners that choose to submit an application as a developer will be required to submit a Developer Eligibility Application and meet the standard analysis to determine whether they handle substantial amount of the development activities
- For the purpose of this definition, the Program Administrators, with oversight from Energy Division, have discretion to determine whether a participant handles such activities, and whether a participant handles a substantial amount of these activities for a given project.



New Developer Definition and Application

Exclusive list of an SGIP energy storage project's development activities

1. Approaching or communicating with the host customer about the project and learning about its needs and energy profile (i.e., customer acquisition or developing leads)
2. Developing the specifications for a system based on the customer's needs and interests
3. Soliciting bids from multiple manufacturers for the specified system
4. Gaining the customer's commitment to purchase or lease the specified system, usually but not necessarily by signing a purchase order with a customer or other form of agreement
5. Purchasing the specified system from the manufacturer to fulfill the obligation to provide a system to the customer
6. Securing permits for the system on behalf of the customer
7. Securing interconnection permission for the system on behalf of the customer
8. Submitting SGIP applications
9. Liaising with the SGIP administrators on incentive reservations
10. Liaising with the SGIP administrators on data reporting requirements
11. Supplying project data to SGIP evaluators
12. Physically constructing the system at the customer's premises
13. Installing the system at the customer's premises



New Developer Definition and Application

DEVELOPER ELIGIBILITY APPLICATION

- New application required to be an eligible Developer for Step 3 or later
- Previous approved Developer (Step 1 & 2) are required to re-apply
- Provide Developer Information
- Indicate all development activities performed by your company
- Affiliations: Developer must disclose relationships with other SGIP participants in developing projects. (Failure to disclose relationships shall be considered an infraction).
- Additional documentation required.
- Acceptance by the Program Administrators of the Developer Eligibility Application does not guarantee that a participant qualifies as a Developer of any given project.



SGIP Equity Budget

- ◆ **CPUC Decision 17-10-004 establishes that 25% of the funds collected for energy storage shall be reserved for the SGIP Equity Budget and awarded to projects that meet specific criteria.**
- ◆ **On November 17, 2017, the SGIP PAs filed an Advice Letter to implement the Equity Budget Decision into the SGIP Handbook:**
 - Beginning in Step 3, 25% of energy storage funds are directed to the Equity Budget, including the non-residential and residential carve-outs. These carve-outs will operate as distinct budget categories that are able to move at different paces.
 - 90% of Equity Funding is allocated to non-residential projects.
 - 10% is allocated to residential projects (including multi-family).
 - A new 20% developer cap per step is established for the Equity Budget.
 - If a PA does not confirm reservations in either the residential or non-residential Equity Budgets during any rolling three month period, while 5 or more general market energy storage projects secure confirmed reservations in the same time period, the incentive rate will increase by \$0.05/Wh. In no event shall the incentive exceed \$0.50/Wh.

SGIP Equity Budget

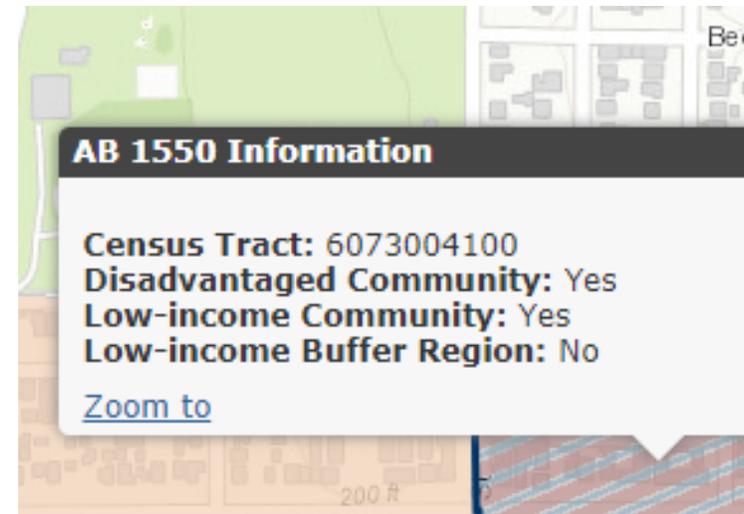
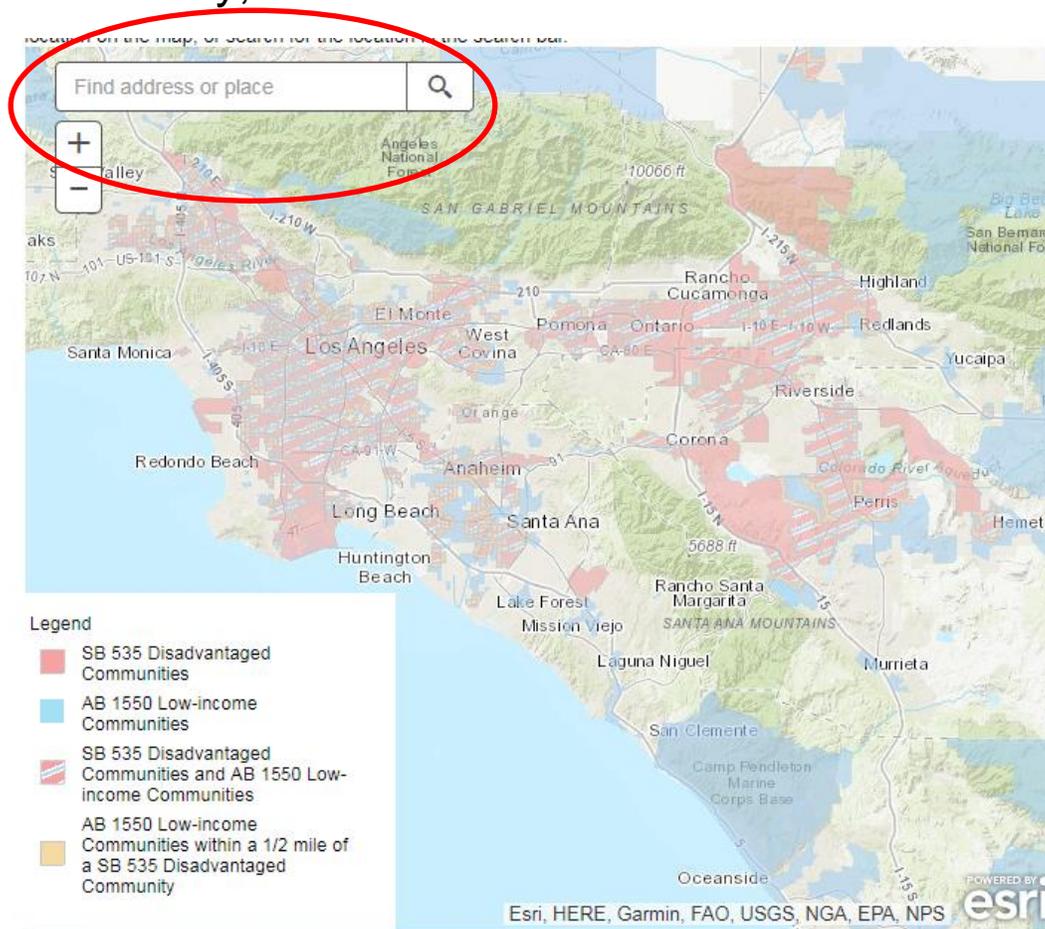
◆ Non-Residential Eligibility Criteria

- Non-residential: The project site must be located in a disadvantaged or low-income community **and** meet one of the following customer criteria:
 - ◆ State or local government agency
 - ◆ Educational institution
 - ◆ Non-profit organization
 - ◆ Small Business, defined as a business or manufacturer, including affiliates, with average annual gross receipts of \$15 million or less, over the last three tax years.
- A disadvantaged community is defined as any census tract that ranks in the statewide top 25% most affected census tracts in the most recently released version of the environmental health screening tool, CalEnviroScreen, plus census tracts that score within the highest 5% of CalEnviroScreen's pollution burden.
- A low-income community is defined as census tracts with median household incomes at or below 80% of the statewide median income, or with median household incomes at or below the threshold designated as low-income by the Department of Housing and Community Development's list of state income limits adopted pursuant to Section 50093.

SGIP Equity Budget

◆ To check for eligibility based on location:

- <https://www.arb.ca.gov/cc/capandtrade/auctionproceeds/communityinvestments.htm>
- Type in the project site address and the map will display disadvantaged community, low-income community, or both.



SGIP Equity Budget

◆ Residential Eligibility Criteria

- **Multi-Family:** Eligible multi-family housing is defined as a multi-family residential building of at least five rental housing units that is operated to provide deed-restricted low-income residential housing, and is either located in a disadvantaged community, or is a building where at least 80% of the households have incomes at or below 60% of the area median income. Any customer account in such buildings will be eligible for the Equity Budget.
- **Single-Family:** Single-family low-income residences that are sold at an affordable housing cost to a lower income household that is subject to a resale restriction or equity sharing agreement.

SGIP Equity Budget

- ◆ The Step 3 Equity Budgets for a given PA territory will open at the same time as Step 3 Large-Scale Energy Storage.
- ◆ SCE will be the first PA to open the Step 3 Equity Budgets and Step 3 Large-Scale Energy Storage on **January 11, 2018**.
- ◆ On December 28, 2017, Applicants may start working on their Equity Budget projects in the SGIP portal. The Developer cap for Equity Budget Step 3 will also be set on this date.

SGIP Equity Budget

	Step 3	Step 4	Step 5
PG&E			
Residential Storage Equity	\$1,227,909.40	\$1,227,909.40	\$523,573.90
Non-Residential Storage Equity	\$11,051,184.57	\$11,051,184.57	\$4,712,165.07
CSE/SDG&E			
Residential Storage Equity	\$405,807.17	\$402,097.88	\$186,884.26
Non-Residential Storage Equity	\$3,652,264.49	\$3,618,880.95	\$1,681,958.32
SoCalGas			
Residential Storage Equity	\$276,147.64	\$276,147.64	\$119,628.64
Non-Residential Storage Equity	\$2,485,328.76	\$2,485,328.76	\$1,076,657.76
SCE			
Residential Storage Equity	\$1,086,013	\$974,438	\$426,622
Non-Residential Storage Equity	\$9,774,116	\$8,769,945	\$3,839,597
Statewide Developer Cap	\$5,991,754.16	\$5,761,186.56	\$2,513,417.31



A low-angle, upward-looking photograph of several tall skyscrapers in a city. The buildings are made of brick and have many windows. The sky is a pale, overcast grey. The overall tone is muted and professional.

SGIP ONLINE DATABASE WORKSHOP

DECEMBER 15, 2017

AGENDA

PRESENTED BY

ANDREA VAS
ENERGY SOLUTIONS



APPLYING FOR EQUITY BUDGET

NEW BUDGET CATEGORIES

PROGRAM METRICS

FORM CHANGES

DOCUMENT REQUIREMENTS



STEP 3+ DEVELOPER ELIGIBILITY

FORM CHANGES

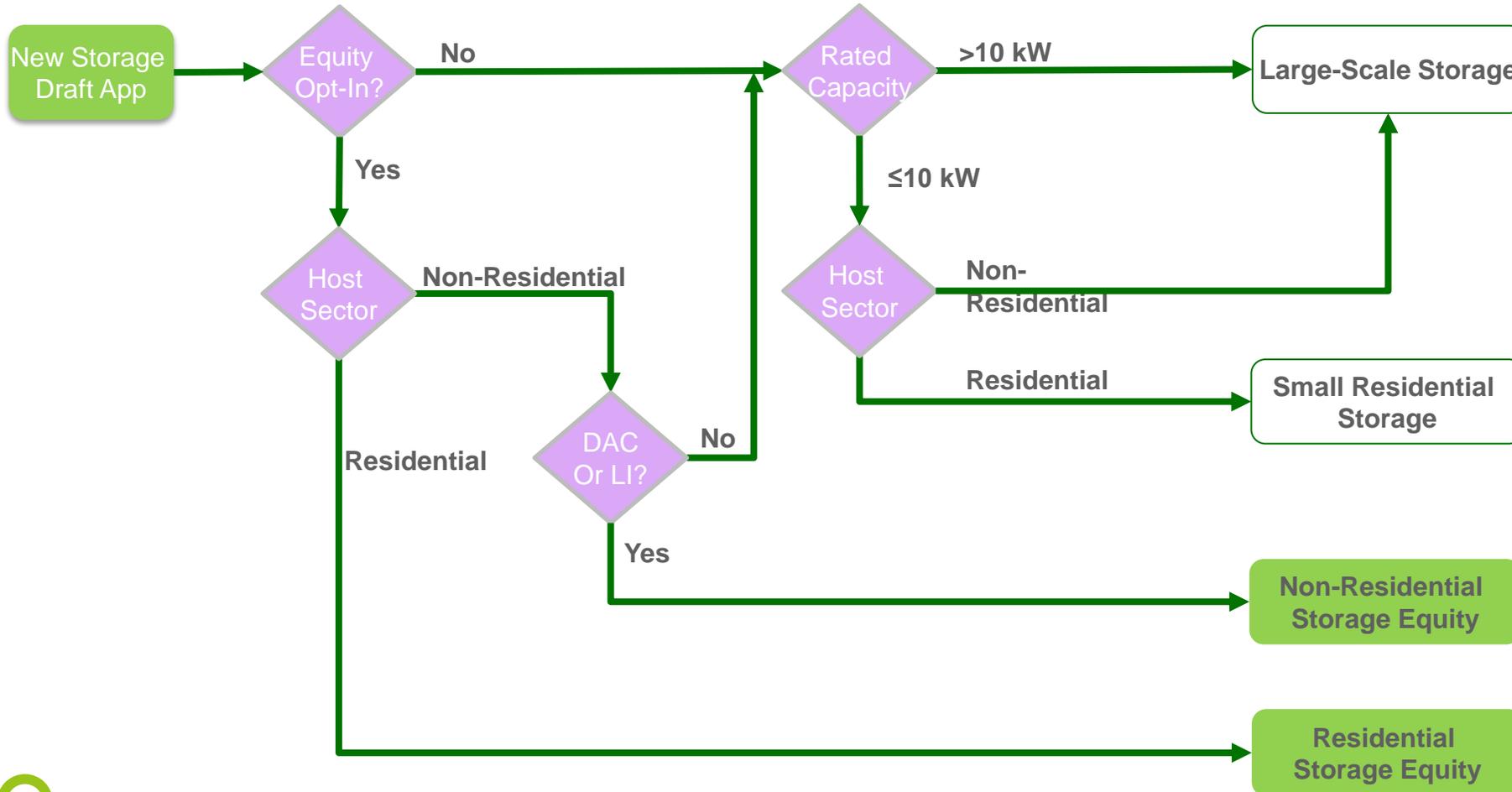




EQUITY BUDGET

EQUITY BUDGET

NEW BUDGET CATEGORIES



- 2 NEW BUDGET CATEGORIES
- SEPARATE STEPS AND OPENING DATES
- SHARED DEVELOPER CAP
- NEW FORM QUESTIONS



EQUITY BUDGET PROGRAM METRICS

Select the Budget Category ▾

- Generation
- Large-Scale Storage
- Small Residential Storage
- Non-Residential Storage Equity
- Residential Storage Equity

***EXAMPLE DATA**



	CSE	SCE	SCG	PG&E
Step Status	Open	Open	Open	Open
Active Step	1	1	1	1
Step Opening Date	May 1, 2017	May 1, 2017	May 1, 2017	May 1, 2017
Days in Step	226	226	226	226
Authorized Collections	\$5,718,173.52	\$13,464,605.80	\$3,796,734.23	\$16,757,415.49
Reallocations	\$4,611.00	\$0	\$2,560,000.00	\$0
Authorized Rollover	\$0	\$0	\$0	\$0
Allocated Funds	\$912,000.00	\$967,500.00	\$0	\$4,913,550.00
Available Funds	\$4,810,784.52	\$12,497,105.80	\$1,236,734.23	\$11,843,865.49



EQUITY BUDGET INCENTIVE RATES

	CSE	SCE	SCG	PG&E
Non-Residential Storage Equity	Step 3	Step 3	Step 3	Step 3
Energy Storage**	\$0.35/Wh	\$0.35/Wh	\$0.35/Wh	\$0.35/Wh
Energy Storage + ITC**	\$0.25/Wh	\$0.25/Wh	\$0.25/Wh	\$0.25/Wh
Residential Storage Equity	Step 3	Step 3	Step 3	Step 3
Energy Storage**	\$0.35/Wh	\$0.35/Wh	\$0.35/Wh	\$0.35/Wh
Energy Storage + ITC + <=10kW**	\$0.35/Wh	\$0.35/Wh	\$0.35/Wh	\$0.35/Wh
Energy Storage + ITC + >10kW**	\$0.25/Wh	\$0.25/Wh	\$0.25/Wh	\$0.25/Wh



CHANGES TO APPLICATION FORM

APPLICATION TYPE PANEL

STORAGE APPLICATIONS ONLY

OPT-IN TO EQUITY BUDGET

ADDITIONAL QUESTIONS TRIGGERED

Application Type

Program Administrator *
Center for Sustainable Energy

Applying for Equity Budget Funds? *
 Yes No

Budget Category	Incentive Step	Incentive Rate
Non-Residential Storage	3	\$0.35/W

Remaining Statewide Developer Funds **Calculated SGIP Incentive**
0

[Save](#)

NOTES
Provide this preliminary information to determine the applicable panels required for your application type.

The summary fields will populate as you complete the remaining panels on the form based on current project and program information. The remaining statewide developer funds represent applications submitted in the current incentive step since this page was last loaded and may not reflect the current status of developer reservation requests.

The incentive step and incentive rate are not confirmed until a conditional or confirmed reservation letter has been issued.



CHANGES TO APPLICATION FORM

HOST CUSTOMER CONTACT PANEL

Host Customer Contact

Contact Name (First and Last) *

Company Name * **Parent Company Name**

Mailing Address *

City * **State *** **Zip Code ***

Email Address * **Phone Number ***

Sector *

Agree to Sector Definition and Eligibility Requirements *

NOTES

Provide the contact information for the Host Customer. See the [SGIP Handbook](#) for program eligibility requirements of the Host Customer.

NAICS codes are required for Non-Residential Host Customers. The NAICS Code database is available at <http://www.naics.com/search/>

If you cannot determine your NAICS Code at this time, please enter "unknown" into the field. You must enter a valid NAICS Code no later than Incentive Claim Form submission.

➤ NEW QUALIFYING SECTORS

➤ READ DEFINITION AND ELIGIBILITY REQUIREMENTS CLOSELY



CHANGES TO APPLICATION FORM

HOST CUSTOMER CONTACT PANEL

The screenshot shows a web form titled "Host Customer Contact" with a dropdown arrow. The form includes fields for "Contact Name (First)", "Company Name", "Mailing Address", "City", "Email Address", and "Sector". A modal dialog box is open, titled "Single Family Low-Income Definition:", containing two paragraphs of text and two buttons: "Disagree" and "Agree".

Host Customer Contact

+ Copy From NOTES

Contact Name (First)
Host Name

Company Name *
Company

Mailing Address *
123 Some Street

City *
Somewhere

Email Address *
a@b.com

Sector *
Single Family Low-Income
Multifamily Low-Income
State or Local Government
Educational Institution
Non-Profit
Small Business

Single Family Low-Income Definition:

A customer living in a single-family low-income residence, as described in subparagraph (c) of paragraph (3) of subdivision (a) of 2852 of the Public Utilities Code.

Subparagraph (c) of paragraph (3) of subdivision (a) of 2852 of the Public Utilities Code:
An individual residence sold at an affordable housing cost to a lower income household that is subject to a resale restriction or equity sharing agreement, for which the homeowner does not receive a greater share of equity than described in paragraph (2) of subdivision (c) of Section 65915 of the Government Code, with a public entity or nonprofit housing provider organized under Section 501(c)(3) of the Internal Revenue Code that has as its stated purpose in its articles of incorporation on file with the office of the Secretary of State to provide affordable housing to lower income households.

Disagree Agree

Agree to Sector Definition and Eligibility Requirements *

Save

NEW
QUALIFYING
SECTORS

READ
DEFINITION AND
ELIGIBILITY
REQUIREMENTS
CLOSELY



CHANGES TO APPLICATION FORM

PROJECT SITE PANEL

➤ CONFIRM PROJECT SITE ADDRESS IS ELIGIBLE

➤ CONFIRM PROJECT SITE ADDRESS IS ELIGIBLE

Project Site

[+ Copy From](#)

Site Address *

City * **State** **Zip Code *** **County ***

Is the site located in a Disadvantaged Community or Low-income Community according to the [CalEnviroScreen](#)? *

- Disadvantaged Community
- Low-Income Community
- Both Low-Income and Disadvantaged
- Neither

NOTES

Provide the physical location of the proposed Project Site. See the [SGIP Handbook](#) for Project Site eligibility requirements. Once the application is submitted, the Project Site may only be changed with prior PA approval.

If the site is in the Southern California Edison territory, you will need to confirm if it belongs to the West LA Basin Local Reliability Area by opening the provided [map overlay](#) in the [Google Earth](#) tool. The applicant must have Google Earth, a free software available at [Google.com](#), uploaded to their computer or device.

To determine whether the project site is located in a Disadvantaged or Low-income Community, please click the link below and enter the site address into the map's search bar.

<https://www.arb.ca.gov/cc/capandtrade/auctionproceeds/communityinvestments.htm>

[Save](#)



EQUITY BUDGET

DOCUMENT REQUIREMENTS

Document Name	Sector	SGIP-Provided
SGIP Multi-Family Low-Income Housing Documentation Cover Sheet	Multifamily Low-Income	X
Copy of Deed Restriction or Regulatory Agreement	Multifamily Low-Income	
Proof of Income Qualification	Single-family Low-Income	
Proof of PU Code Section 2852 Compliance	Single-family Low-Income	
Certification of tax-exempt status	State or Local Government, Non-profit Organization	
Small Business Affidavit	Small Business	X
Proof of Eligibility under Proposition 39 or Accredited Institution	Educational Institution	





DEVELOPER ELIGIBILITY

STEPS 3+ DEVELOPER ELIGIBILITY

DEVELOPER CONTACT PANEL



DEVELOPER
COMPANY IS
FILTERED BY
STEP



USE THE SAME
DEVELOPER
KEY



SELECT ALL
APPLICABLE
ACTIVITIES

Developer Contact

Developer Company *

This field is required.

Developer Key *

This field is required.

NOTES
Select the name of the Project Developer from the approved Developer Company list. Enter the corresponding Developer Key assigned to the designated Developer in order to proceed with application submission. If you do not know the Developer Key, please contact your Developer.

All participating Developers must be approved by SGIP Program Administrators. The application form can be found on the [Developer Application Page](#). Once the application is submitted, Developer information may only be changed with prior PA approval.

Applicants may not submit applications for Developers in excess of the 20% Statewide Developer Cap for the current step.

Contact Name (First and Last)

Mailing Address

City **State** **Zip Code**

Phone Number **Email Address**

Activities*
Select which activities are or will be performed by the designated Developer for **this project**:

- Approaching or communicating with the target customer about the potential project and learning about its needs and energy profile (i.e., customer acquisition or developing leads)
- Developing the specifications for a system based on the customer's needs and interests
- Soliciting bids from multiple manufacturers for the specified system

... 13 activities

Who is performing the other activities?





THANK YOU

A V A S @ E N E R G Y - S O L U T I O N . C O M

SGIP Field Inspection Sampling Protocol

◆ SGIP Field Inspection Sampling protocol:

- The protocol can be found at the Selfgenca.com Resources page:

<https://www.selfgenca.com/home/resources/>

- The protocol can also be found embedded in this slide (click Adobe link)



Adobe Acrobat
Document

Self-Generation Incentive Program Resources

(scroll down)

3. SGIP Developer Eligibility Application

[Approved SGIP Developer List](#)
[Developer Application Page](#)

4. California Manufacturer

[Approved California Manufacturer List](#)
[Request for California Manufacturer Status Under SGIP](#)
[PRE-2017 California Supplier List](#)

5. Performance Data Providers

[Approved Performance Data Providers](#)
[PDP File Format Specification](#)
[Performance Data Provider \(PDP\) Application Questionnaire](#)

6. Field Inspection Protocols

 [Energy Storage Field Inspection Protocol](#)
[Field Inspection Sampling Protocol](#)

7. Program Modification

[Program Modification Request Form](#)
[Self-Generation Incentive Program Modification Guidelines \(PMG\)](#)

◆ Background

- CPUC Decision 16-055-55 required the SGIP Program Administrators to hold a workshop for stakeholders to discuss implementing a sampling protocol for inspections into the SGIP.
- The workshop was held on November 16, 2016 and presented the Program Administrators' preliminary protocol.
- After receiving feedback from stakeholders, CSE filed an Advice Letter on April 27, 2017 on behalf of the program with a revised Field Inspection Protocol as well as the Inspection Sampling Protocol.
- The new Sampling Protocol was approved by the CPUC and went into effect on August 29, 2017

◆ What are the terms of the Inspection Sampling Protocol?

- The Program Administrators are committed to ensuring the safety and compliance with program rules of each incentivized project
- The Program Administrator reserved the right to inspect any project seeking an incentive
- The protocol may be implemented at the discretion of each PA, and is managed by territory

◆ How will the Inspection Protocol be applied?

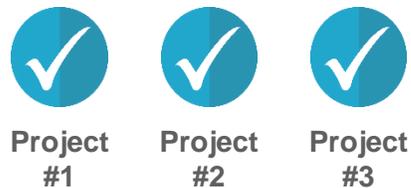
- If the protocol is implemented in a service territory, it will be applied to each developer, and by residential and non-residential projects
 - ◆ Developers with both residential and non-residential customers will be subject to two different samplings based on customer class (residential and non-residential)

SGIP Field Inspection Sampling Protocol

◆ How does the inspection sampling protocol work?

- **PHASE 1:** For each developer, the first three projects using the same model for one customer class will be inspected
- **PHASE 2:** After three successful inspections (no failures), the PA may move to 1 in 5 inspections for that developer, customer class, and equipment model
- **PHASE 3:** After a total of six successful inspections, the PA may move to 1 in 10 inspections for that developer, customer class, and equipment model.
 - ◆ This is the lowest sampling frequency allowed by the program
- New equipment models will be subject to at least three successful inspections, and then may be included into the current sampling rate for that developer

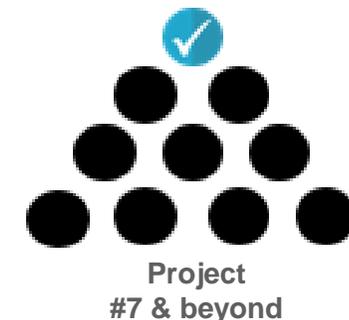
PHASE 1



PHASE 2



PHASE 3



◆ Inspection Failures

- The Inspection Sampling Protocol considers two types of failures

1. Requires another site visit:

- The equipment installed is not operating at the time of inspection
- The inspector is unable to access and/or verify the equipment
- The technology installed does not match the technology identified in the ICF documentation

2. Does not require another site visit:

- The make and/or model of the equipment installed does not match what was identified on the ICF documentation
- Sufficient discharge data is not submitted prior to inspection
- The equipment is installed behind a different meter than what was identified on the application documentation

SGIP Field Inspection Sampling Protocol

- ◆ What would cause the sampling to reset/start over?
 - A rolling inspection failure rate of $\geq 5\%$ of projects with the same model may result in a reset
 - Any failure that requires another site visit will result in an automatic reset of the sampling



Energy Storage Field Inspection and Discharge Testing Protocol

- ◆ Alex Kaufman, PE CEM
 - Energy Engineer at the Center for Sustainable Energy
 - Part of statewide SGIP Technical Working Group

1. Prior to inspection:

- Verify that all necessary equipment information (e.g. make, model, kW and/or kWh capacity, etc.) is easily visible either from the outside or on the interior of the system
- If access to the interior of the system is necessary, a qualified technician must be present to facilitate verification.
 - ◆ **I am not a qualified technician**

2. Prior to inspection:

- Verify energy storage system is configured to operate in parallel with grid by supplying **at least one** of the following:
 1. Interconnection agreement or Permission to Operate (PTO) letter
 2. Charge and discharge data for the unit installed and comparison to interval data from the utility
 3. Copy of electrical single line diagram for the project
 4. Field technician at the site inspection with a user interface such as a laptop to demonstrate parallel operation during the inspection

3. Prior to inspection:

- Provide one weeks' worth of operational data:
 - ◆ Dates and timestamps, acceptable in one to five minute increments
 - ◆ Power (kW)
 - ◆ Energy (kWh)
 - ◆ State of charge (%)
 - ◆ Serial number or unique identifier of the battery or energy storage system
- The inspector will verify standby, charging and discharging modes

Pre-Inspection Protocol

Discharge testing requirement:

- Select either Option 1 **OR** Option 2
- Must include the following data:
 - a. The type of load served (i.e. native load, grid or artificial load, depending on what is practical at the installation)
 - b. Unique system identifier
 - c. Ambient temperature at the time of the test
 - d. Interval data (no less than 1 minute, and no more than 5 minutes) with the following information for each interval:
 - Date and time stamps
 - kW and/or kWh
 - State of charge

◆ Option 1: Field Test

- Continuous discharge test measuring actual energy storage system output over the **discharge duration specified on the application**
- The continuous discharge test is to be completed by the project developer, System Owner or Host Customer **independently of the field verification visit**

- ◆ Option 2: Factory Test Accompanied by a 30-Minute Field Test
 1. Factory Test: Manufacturer and/or system integrator continuous discharge test report of the same make and model as the unit(s) inspected in the field
 - ◆ Factory report must also include description of testing approach or methodology and location of test.
 2. Thirty-Minute Test: A ½ hour continuous field discharge test measuring actual energy storage system output must be provided
 - ◆ Does not require demonstration of the system's full rated capacity and is not intended to calculate the incentive, rather to provide insight into the onsite system's actual operation.

Example of Acceptable Interval Data

(This is not a template)

	A	B	C	D	E
1	SGIP Project Number: 2017-xxxx				
2	Project Site: 123 Main Street, Anywhere, CA 12345				
3	Unique System Identifier: 01234-abcde				
4	Load: Native				
5	Ambient Temperature: 76°F				
6					
7	Timestamp	Time	Power (kW)	Cumulative Energy (kWh)	SoC
8	10/12/2015	6:54:00 PM	15.739	0.262	99%
9	10/12/2015	6:55:00 PM	15.73	0.524	99%
10	10/12/2015	6:56:00 PM	15.734	0.787	98%
11	10/12/2015	6:57:00 PM	15.729	1.049	97%
12	10/12/2015	6:58:00 PM	15.737	1.311	96%
13	10/12/2015	6:59:00 PM	15.736	1.573	95%
14	10/12/2015	7:00:00 PM	15.734	1.835	94%

(This is not a template)

Example includes:

- ◆ Project number
- ◆ Site
- ◆ System unique system identifier
- ◆ Timestamp
 - 1 minute interval
- ◆ Power (kW)
- ◆ Energy discharged/charged over increment (kWh)
- ◆ State of Charge

- ◆ Inspector will:
 - **Visually inspect** the energy storage system to verify:
 - ◆ System can service onsite load
 - ◆ System can operate in parallel with the grid
 - ◆ Equipment is permanently installed
 - ◆ Same make, model, capacity, and configuration specified in the application documentation
 - While on-site during the inspection, the inspector **may be required** to witness a discharge demonstration of the system
 - ◆ Performed on-site or remotely by the project Developer, System Owner or Host Customer

◆ Inspector will not:

- Interrupt/affect energy storage system operation (visual inspection only)
- Shut off power to project site
- Perform discharge tests
- Open energy storage system cabinetry

Questions?

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The Energy Storage Field Inspection Protocol can be downloaded here:
https://www.selfgenca.com/documents/field_inspection/energy_storage/protocol

Questions from Stakeholders

- ◆ **In the cases where a Request for Proposal (RFP) is required, can the RFP be submitted at the Reservation Request Form (RRF) stage, as opposed to after conditional confirmation?**
 - Yes. Public entities are able to upload their RFP documentation any time before RFP due date.
- ◆ **If there is a change to rebate forms that does not affect the incentive amount, is it possible to bypass the customer signature to avoid burdening them with multiple requests?**
 - Generally we want the Host Customer to be aware of any change in their application. Changes that affect the incentive, equipment, project site, ownership or customer will require new signatures.

Questions from Stakeholders

- ◆ **Can the SGIP admin issuing a correction email please include SGIP administrator contact information (such as email and phone number) for ease of communication?**
 - PAs do their best to send emails from personal accounts or with personal contact information to provide the best customer service. Each PA handles this slightly differently but we do our best to make personal contact.

- ◆ **Can SGIP provide estimated review timelines for each stage of the application?**
 - Each application will be reviewed in the order in which it was received. The SGIP Public Report is a good tracking resource, it is updated in real time and shows the project statuses statewide
 - Contact your PA for specific review timelines

Questions from Stakeholders

- ◆ Review of the exact Documents required to submit for the ICF step (including any additional supporting documents needed in the Ad-Hoc Document section. I.e.: any engineered drawings in specific?). We have reviewed the handbook, but would like it reviewed if possible.

5.4.3 *Required Documentation for Incentive Claim*

Energy storage applications must provide a copy of the following:

Table 5.4.3: Incentive Claim Requirements

Required Materials	
1.	Completed Incentive Claim Form <i>(All Projects)</i>
2.	Proof of Authorization to Interconnect <i>(Projects that interconnect with the electrical grid)</i>
3.	Project Cost Affidavit and Breakdown Worksheet <i>(All Projects)</i>
4.	Building Permit Inspection Report <i>(All Projects)</i>
5.	Substantiation for New or Expanded Load (if applicable): <i>(All Projects)</i>
6.	Final Monitoring Schematic <i>(All Projects >= 30 kW and/or projects paired with on-site renewable generators)</i>

Questions from Stakeholders

- ◆ **Developer cap, how it was implemented? What can consumers do to take part in the SGIP rebate and not have to go to a lesser-known vendor if my preferred developer is ‘capped out’?**
- CPUC Decision
- Program Modification process