



SELF-GENERATION
INCENTIVE PROGRAM

SGIP 2nd Quarterly Workshop of 2025 and Third-Party Ownership (TPO) Consumer Protection Workshop

May 9, 2025



Introduction



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PROGRAM ADMINISTRATORS

SCE:

- Jim Stevenson
- Vicky Velazquez

SoCalGas:

- Julio Robles
- Laura Diaz
- Adrian Martinez
- Jan Santos
- Sandi Linares-Plimpton

PG&E:

- Ron Moreno
- Mary Magdanz

CSE:

- Shalene Pierce
- Dema Tzamaras
- Jess Hilton
- Lupe Knox

LADWP:

- Christian Kroupa
- Narek Abcarian
- Stephanie Macoritto
- Eric Escamilla
- Samer Fakhro



Introduction (continued)



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AESC (Technical)

- Dara Salour
- Stephanie Raya

Energy Solutions

- Kelsey Albers
- Alejandro Prieto
- James Marin
- Katie Freitag

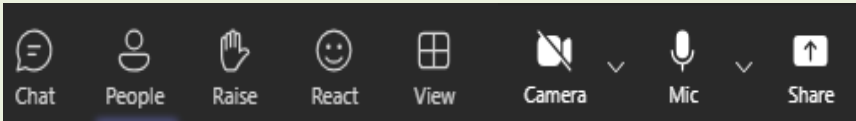

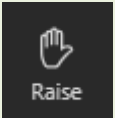
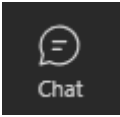
Energy Division (CPUC)

- Justin Galle
- Gabriel Petlin
- Maya Noesen



Teams Meeting



Function	Teams Icon
Controls	 A horizontal bar containing icons for Chat, People, Raise, React, View, Camera, Mic, and Share.
Mute – <i>Remain muted unless called on</i>	 A microphone icon with a slash through it and a dropdown arrow, labeled "Mic".
Raise Your Hand – <i>Wait until you are confirmed to speak on the chat or host</i>	 A hand icon with the palm facing up, labeled "Raise".
Type Your Question or Comment	 A speech bubble icon with an equals sign inside, labeled "Chat".



Agenda



- Welcome and Introductions (SCE) 9:05 – 9:10am
- Residential Solar Storage Equity (RSSE) Opening (SoCalGas) 9:10 – 9:30am
- SGIP Database Update Presentation (Energy Solutions) 9:30 – 10:15am
- Q&A 10:15 – 11:00am
- Third-Party Ownership (TPO) Consumer Protection Workshop – 11:00am





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Residential Solar & Storage Equity (RSSE) Opening and Inflation Reduction Act (IRA) Tax Credit



RSSE Opening – Important Dates



On May 20th, 2025:

- Applicants can start drafting applications for the RSSE Budget for the PG&E, SCE, SoCalGas and CSE (SDG&E) PA territories.
- Applicants will have two weeks to create applications, upload documentation, and obtain signatures in preparation for submissions.
- Questions about RSSE eligibility and program document requirements should be directed to your SGIP PA.
- Questions about database functionality and/or user access should be directed to sgipsupport@energy-solution.com.
- Newest version of the SGIP Handbook will also be available at www.selfgenca.com/home/resources/.

On June 2nd, 2025:

- Applicants can start submitting complete RSSE applications.
- If oversubscription occurs in a PA territory from the first day of submittals, the program will follow the current Lottery process.



RSSE Opening – Incentive Funding



AB 209 Available Funds:

- PG&E - \$99 Million (\$31 Million set aside for POU's)
- SCE - \$87.3 Million (\$1 Million set aside for POU's)
- CSE - \$19.8 Million
- SoCalGas - \$13.5 Million
- Each territory has 2% set aside for tribal customers

RSSE Projects will first be funded by Ratepayer funds, if available, before AB 209 Funds are allocated.

Stakeholders can stay updated on incentive funding information by visiting www.selfgenca.com/home/program_metrics/.



RSSE Opening



Application types for RSSE:

- Storage Applications (Ratepayer or AB 209) and Solar + Storage Applications (AB 209)
 - Solar Only Applications are not eligible for SGIP funding.

Incentive Rates for RSSE:

- \$1.10/Wh for Energy Storage Systems
- \$3.10/W for Solar Systems

Advance Payment Program (APP) is currently available for developers interested in participating.

- Approved developers for APP can receive 50% of the SGIP incentive when an application receives a Confirmed Reservation Letter for a RSSE application.
- Visit www.selfgenca.com/home/dev_register/ to learn how to enroll in APP.



Inflation Reduction Act Tax Credit Guidelines



The IRA Tax Credits Guidelines (Resolution E-5373) will go into effect in the SGIP Database on May 20th, 2025.

SGIP will cap the incentive payment at 70% for AB 209 funded projects, third-party owned systems, and non-residential projects.

Projects required to disclose IRA Tax Credit (0 to 30 percent) for ratepayer funded host customer owned residential projects.

Projects stating the IRA Tax Credit will not be claimed are required to provide documentation explaining why the project would be ineligible for the tax credit and why the credit could not otherwise be utilized or transferred by a third-party entity.

Full IRA Tax Credit guideline will be in the newest version of the SGIP Handbook (May 20th).





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Questions?



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AB209 Database Updates

Energy Solution



SGIP Q2 Stakeholder Workshop AB 209 Database Updates

May 9th, 2025

Alejandro Prieto
Engineer, Distributed Energy Resources

Katie Freitag
Engineer, Distributed Energy Resources



Agenda

1. New Budget Category: RSSE
2. Solar and Storage Application
3. Panel Updates
4. Advance Payment Program

New Budget Category: Residential Solar and Storage Equity (RSSE)

Residential Solar & Storage Equity Budget

- *RSSE – Ratepayer*: Storage only for IOU customers
- *RSSE – AB 209*: Storage only & Solar + storage for IOU/POU/other LSE customers
- SJV Residential Rate updated to \$1.10 / Wh

Select the Budget Category -

Large-Scale Storage
Small Residential Storage
Residential Solar and Storage Equity - Ratepayer
Residential Solar and Storage Equity - AB 209
Non-Residential Storage Equity
Equity Resiliency
San Joaquin Valley Residential
San Joaquin Valley Non-Residential
Generation

ty - AB 209 as of 8/9/2024

	CSE	SCE	SCG	PG&E
Open	Open	Open	Open	Open
6	6	6	6	6
Aug. 8, 2024	Aug. 8, 2024	Aug. 8, 2024	Aug. 8, 2024	Aug. 8, 2024
1	1	1	1	1
\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00
Reallocations	\$0.00	\$0.00	\$0.00	\$500.00
Authorized Rollover	\$0.00	\$0.00	\$0.00	\$0.00
Allocated Funds	\$0.00	\$0.00	\$0.00	\$0.00
Available Funds	\$0.00	\$0.00	\$0.00	\$500.00

Incentive Rates for Current Steps

The equipment and biogas incentive rates per PA territory are displayed in the table below. The table references the incentive rates for the currently active step in each PA territory and is updated nightly, or in the case of a lottery, after the results are published.

	CSE	SCE	SCG	PG&E
Large-Scale Storage	Step 4	Step 5	Step 5	Step 5
Energy Storage**	\$0.30/Wh	\$0.25/Wh	\$0.25/Wh	\$0.25/Wh
Energy Storage + ITC***	\$0.22/Wh	\$0.18/Wh	\$0.18/Wh	\$0.18/Wh
Small Residential Storage	Step 7	Step 7	Step 7	Step 7
Energy Storage**	\$0.15/Wh	\$0.15/Wh	\$0.15/Wh	\$0.15/Wh
Residential Solar and Storage Equity - Ratepayer	Step 6	Step 6	Step 6	Step 6
Energy Storage**	\$1.10/Wh	\$1.10/Wh	\$1.10/Wh	\$1.10/Wh
Residential Solar and Storage Equity - AB 209	Step 6	Step 6	Step 6	Step 6
Energy Storage**	\$3.10/Wh	\$3.10/Wh	\$3.10/Wh	\$3.10/Wh
Non-Residential Storage Equity	Step 5	Step 5	Step 5	Step 5
Energy Storage**	\$0.85/Wh	\$0.85/Wh	\$0.85/Wh	\$0.85/Wh
Equity Resiliency	Step 5	Step 5	Step 5	Step 5
Equity Resiliency	\$1.00/Wh	\$1.00/Wh	\$1.00/Wh	\$1.00/Wh

AB 209 Funding Allocation

- *RSSE* – *Ratepayer* budget will not have a waitlist or a lottery.
- If ratepayer funds run out, applications will move to AB 209 funds under *RSSE* – *AB 209* budget.

Waitlists				
	CSE	PG&E	SCE	SCG
Equity Resiliency	Waitlist	Waitlist	Waitlist	Waitlist
Generation	Waitlist			
Large-Scale Storage	Waitlist			Waitlist
Non-Residential Storage Equity	Waitlist	Waitlist		
Residential Solar and Storage Equity - AB 209				
San Joaquin Valley Non-Residential				
San Joaquin Valley Residential				
Small Residential Storage	Waitlist			

Funding Caps

- The database will keep track of AB 209 funding requirements
 - Portion of RSSE-AB 209 funds set aside for POU customers in SCE and PG&E territories
 - Portion of RSSE-AB 209 funds set aside for Tribal customers is initially capped at 2%
 - Will be displayed on the Program Metrics Page

Residential Solar and Storage Equity Non-POU Cap

Acceptance will be paused for Residential Solar and Storage Equity - AB 209 customers, once non-POU reservation requests from such customers have reached the set cap amount per PA available funds for each residential incentive step. This report includes pending applications submitted today.

PA	Cap \$	Non-POU \$	POU \$
Step 6			
SCE	\$86,000,000.00	\$0.00	\$0.00
PG&E	\$68,000,000.00	\$0.00	\$0.00

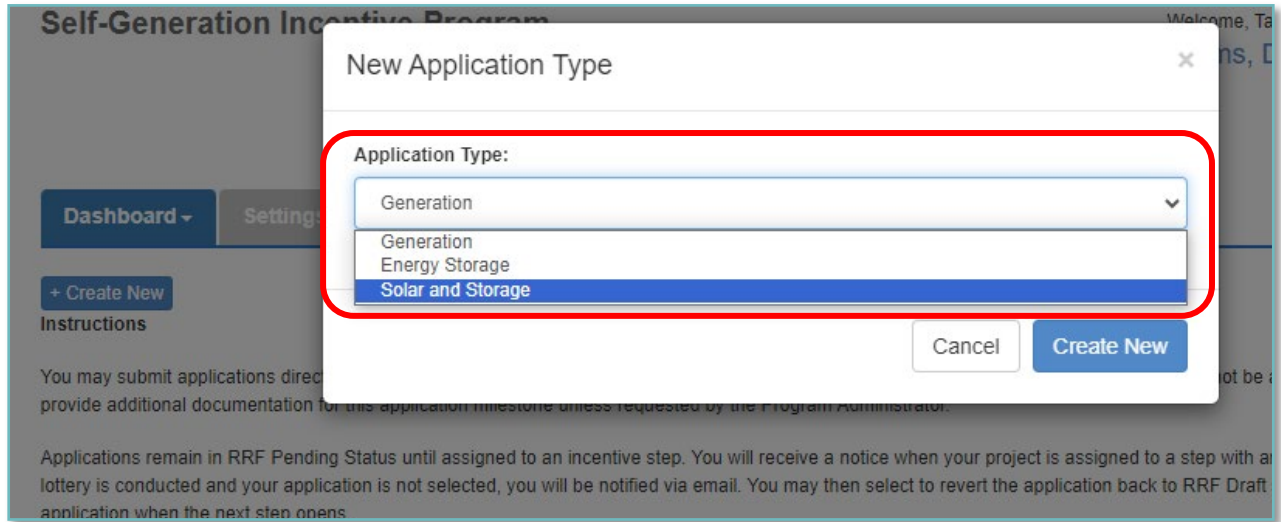
Residential Solar and Storage Equity Non-Tribal Cap

Acceptance will be paused for Residential Solar and Storage Equity - AB 209 customers, once non-tribal reservation requests from such customers have reached the set cap percent per PA available funds for each residential incentive step. This report includes pending applications submitted today.

PA	Cap %	Non-Tribal %	Tribal %	Cap \$	Non-Tribal \$	Tribal \$
Step 6						
CSE	98%	0%	0%	\$19,404,000.00	\$0.00	\$0.00
SCE	98%	0%	0%	\$85,554,000.00	\$0.00	\$0.00
SCG	98%	0%	0%	\$13,230,000.00	\$0.00	\$0.00
PG&E	98%	0%	0%	\$97,020,000.00	\$0.00	\$0.00

Solar and Storage: Application Type Panel

- Application type is not editable
 - Solar and Storage applications will be locked with the "Equity" budget
 - Electric Utility will inform the Program Administrator
- Gas Utility is now required in Utility Information Panel



Self-Generation Incentive Program

Welcome, Ta
ns, D

New Application Type

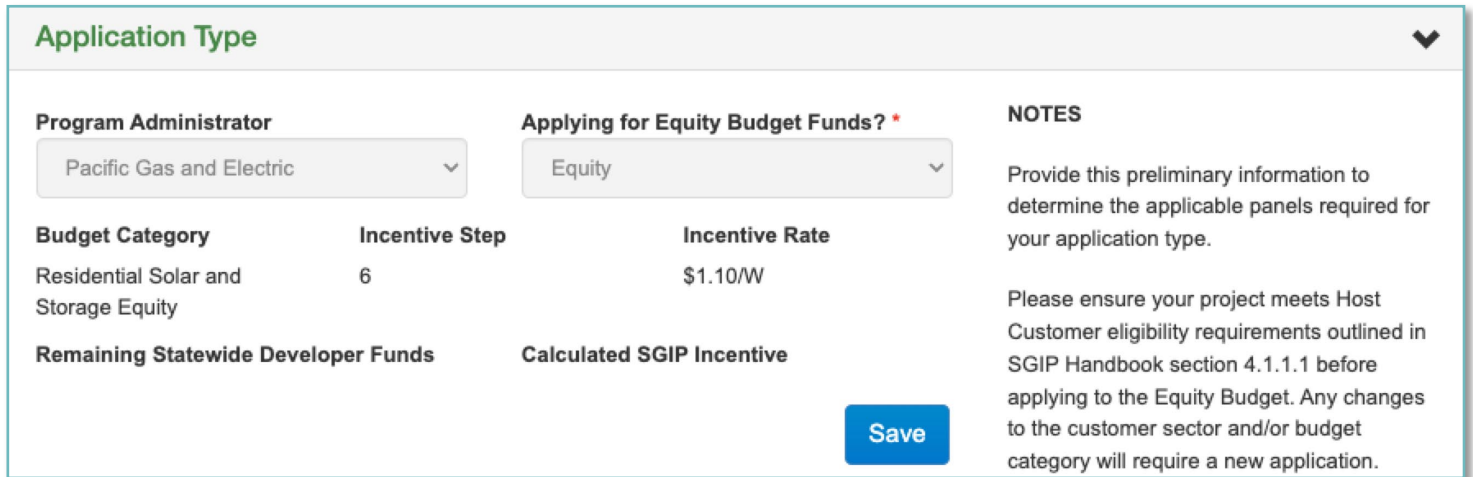
Application Type:

- Generation
- Generation Energy Storage
- Solar and Storage**

Cancel Create New

You may submit applications direct
provide additional documentation for this application milestone unless requested by the Program Administrator.

Applications remain in RRF Pending Status until assigned to an incentive step. You will receive a notice when your project is assigned to a step with a
lottery is conducted and your application is not selected, you will be notified via email. You may then select to revert the application back to RRF Draft
application when the next step opens.



Application Type

Program Administrator: Pacific Gas and Electric

Applying for Equity Budget Funds? * Equity

Budget Category	Incentive Step	Incentive Rate
Residential Solar and Storage Equity	6	\$1.10/W

Remaining Statewide Developer Funds Calculated SGIP Incentive

Save

NOTES

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

Please ensure your project meets Host Customer eligibility requirements outlined in SGIP Handbook section 4.1.1.1 before applying to the Equity Budget. Any changes to the customer sector and/or budget category will require a new application.

Changes to Host Customer Panel

- New question: "Is project on Tribal Land?" (used for tribal caps)

Solar and Storage application

- Application fields hidden to simplify the application process
- Limited to Single Family and Multifamily
- Additional changes to the **Multifamily** applications
 - Rate structure is locked to "Residential"

This screenshot shows the 'Single Family Residential Solar and Storage Application' form. It includes the following fields and options:

- Sector ***: A dropdown menu with 'Single Family' selected.
- Is this project located on Tribal land? ***: Radio buttons for 'Yes' (selected) and 'No'.
- Is household Low-Income Status? ***: Radio buttons for 'Yes' (selected) and 'No'.
- Has the Host Customer received an incentive reservation letter from either the MASH, SASH, DAC-SASH, or SOMAH programs? ***: Radio buttons for 'Yes' (selected), 'No', and 'Not Applicable'.
- Has the Host Customer been income verified as a result of participation in an income-qualified program? ***: Radio buttons for 'Yes' (selected) and 'No'.
- Which program is the Host Customer enrolled in? ***: A dropdown menu with 'CARE' selected.

Single Family Residential Solar and Storage Application

This screenshot shows the 'Multifamily Residential Solar and Storage Application' form. It includes the following fields and options:

- Sector ***: A dropdown menu with 'Multifamily' selected.
- Is this project located on Tribal land? ***: Radio buttons for 'Yes' (selected) and 'No'.
- Is household Low-Income Status? ***: Radio buttons for 'Yes' (selected) and 'No'.
- Has the Host Customer received an incentive reservation letter from either the MASH, SASH, DAC-SASH, or SOMAH programs? ***: Radio buttons for 'Yes' (selected), 'No', and 'Not Applicable'.
- Interconnecting under VNEM? ***: Radio buttons for 'Yes' (selected) and 'No'.
- What type of rate is the host customer on? ***: Radio buttons for 'Residential' (selected) and 'Non-Residential'.
- Agree to Sector Definition and Eligibility Requirements ***: A checked checkbox.

Multifamily Residential Solar and Storage Application

Changes to Project Finance Panel

- New field for Residential projects: "Is this project Third-Party Owned?"
- Investment Tax Credit % must be at least 30% for projects:
 - Non-residential
 - Residential and third-party owned
 - State funded

Solar and Storage Application

- Added field for Solar Investment Tax Credit percentage
- Added section for Total Eligible Project Cost – Solar
- Added section for up to four additional incentives
 - Sum of each is displayed in the respective calculator output section

Project Finance

Project Costs

Total Eligible Project Costs (TEPC) *

\$

Total Eligible Project Costs - Storage *

\$

Ineligible Project Costs

\$

Total Eligible Project Costs - Solar *

\$

Is this project Third-Party Owned? * ☒ Yes ☐ No

Are you or any affiliated entity taking the Federal Investment Tax Credit (ITC) for this project? * ☒ Yes ☐ No

Storage Investment Tax Credit (ITC) as a % of TEPC *

30%

Solar Investment Tax Credit (ITC) as a % of TEPC *

30%

Other Incentives Received for this Project

Storage

Incentive Type

Incentive Amount

Description

\$

[\(+ Add Other Storage Incentives \(Up to 4\)\)](#)

Solar

Incentive Type

Incentive Amount

Description

\$

[\(+ Add Other Solar Incentives \(Up to 4\)\)](#)

Solar and Storage: Project Costs Form

Applicants will need to enter \$ amounts separately for Solar and Storage:

- Project Cost Breakdown displayed at ICF
- Storage (TEPC) + Solar (TEPC) = Total Eligible Project Costs (TEPC)

Project Cost Breakdown	
Engineering & Design Costs	
Storage	Solar
\$ 10.00	\$ 10.00
Permitting Costs	
Storage	Solar
\$ 10.00	\$ 10.00
Capital Equipment Costs	
Storage	Solar
\$ 5	\$ 5.00
Construction & Installation Costs	
Storage	Solar
\$ 0.00	\$ 0.00
Interconnection Costs – Electric & Gas	
Storage	Solar
\$ 0.00	\$ 0.00
Warranty Cost and/or Maintenance Contract Costs	
Storage	Solar
\$ 0.00	\$ 0.00
Metering, Monitoring and Data Acquisition System Cost	
Storage	Solar
\$ 0.00	\$ 0.00
Sales Tax	
Storage	Solar
\$ 0.00	\$ 0.00
Other Eligible Costs	
Storage	Solar
\$ 0.00	\$ 0.00
Sum of Project Cost Breakdown	
Storage	Solar
\$ 25.00	\$ 25.00

Select Next to save the changes temporarily. You will still need to click on Save at the bottom of the Project Finance panel to save the changes. Select Cancel to revert your changes to the last time you saved the panel.

Cancel Next

Application Print Form

Before funding source is determined, during RRF Draft, there is a disclaimer stating your incentive is subject to change

After funding source is determined, after RRF Submitted, the disclaimer will indicate the funding source.

Calculated Incentive: \$10,000.00

If changes have been made to your project since it was originally submitted, the calculated incentive amount above may differ from the requested incentive amount. The final incentive amount is subject to Program Administrator approval.

Your incentive is subject to change due to the Inflation Reduction Act tax credit guidelines outlined in the SGIP Handbook depending on if the project is funded via state funds or ratepayer funds. After your application is formally submitted into the budget, you will receive an email notification indicating the funding source.

Requested Incentive: \$10,000.00

If changes have been made to your project since it was originally submitted, the calculated incentive amount above may differ from the requested incentive amount. The final incentive amount is subject to Program Administrator approval.

Your estimated incentive is coming from Ratepayer funds.

Requested Incentive: \$7,000.00

If changes have been made to your project since it was originally submitted, the calculated incentive amount above may differ from the requested incentive amount. The final incentive amount is subject to Program Administrator approval.

Your estimated incentive is coming from State funds.

Solar and Storage: Proposed System Information- Solar

- New panel for photovoltaic systems
- CEC Approved Inverters
 - Manufacturer
 - Model
 - Quantity
 - Inverter Efficiency – Autofill
 - Nameplate capacity – Autofill
- CEC Approved Modules
 - Manufacturer
 - Model
 - Quantity
 - Array Tilt
 - Azimuth
 - Array Type
 - Mounting Method
 - Array Capacity – Autofill

Proposed System Information - Solar

Inverters

<u>Manufacturer</u>	<u>Model</u>	<u>AC Capacity</u>	<u>Count</u>	<u>Eff.</u>	<u>Total AC Cap.</u>
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(+) Add Inverter

Photovoltaic Arrays

<u>Model</u>	<u>Array type</u>	<u>Rating</u>	<u>Count</u>	<u>Tilt</u>	<u>Az.</u>	<u>Total DC Cap.</u>
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(+) Add Array

Inverter Efficiency

%

System Inverter Capacity AC

kW

Minimum Shading *

Yes

System Array Output DC

kW

PVWatts Calculation Status

<u>Array Summary</u>	<u>Input</u>	<u>Optimal</u>	<u>92867</u>
----------------------	--------------	----------------	--------------

Calculate

Results

Solar Calculator

- New NREL PVWatts Integration
- Built in calculator
- Press *Calculate* button to retrieve instant results
 - Calculates/ displays annual production values
 - Calculates solar incentive
 - Calculation timestamp

Calculate		
Results		
Month	Proposed Location Generation (kWh)	Proposed Location with Optimal ¹ Tilt (kWh)
January	537.869	537.740
February	577.421	577.343
March	703.117	703.087
April	746.863	746.873
May (summer ²)	712.948	713.001
June (summer ²)	736.124	736.198
July (summer ²)	771.203	771.264
August (summer ²)	768.624	768.651
September (summer ²)	680.894	680.875
October (summer ²)	652.738	652.664
November	582.461	582.354
December	523.617	523.479

Annual Energy Total at Proposed Location

7,994 kWh

Annual Energy Total with Optimal¹ Tilt

7,994 kWh

Summer² Energy Total at Proposed Location

4,323 kWh

Summer² Energy Total with Optimal¹ Tilt

4,323 kWh

Summer² Energy Total at Zip Code 92867

4,527 kWh

CEC-AC Rating³

4.737 kW

Total Solar Panel Area

32.540 m²

Average Nameplate Capacity (weighted by total area)

246.700 W

Average PTC Adjusted (weighted by total area)

250.481 W

Design Correction

99.997%

Geographic⁴ Correction

95.478%

Installation⁵ Correction

100.000%

Design Factor

95.475%

CSI Rating

4.522 kW

Incentive Rate

\$3.10/Watt

Base Solar Equipment Incentive

\$14,019.19

Calculated on Fri May 02 2025 14:26:06 GMT-0700 (Pacific Daylight Time)

¹ "Optimal" Tilt for a given azimuth is the tilt that optimizes for largest Summer² Energy Total when rounding that azimuth to the nearest multiple of 10

² "Summer" is defined as May through October

³ "CEC-AC Rating" is defined as the sum of the Nameplate Capacity of all panels times the Inverter Efficiency

⁴ "Geographic Correction" is the ratio of the "Summer" Energy total with "Optimal" Tilt over the "Summer" Energy Total at Zip Code 92867

⁵ "Installation Correction" is the ratio of the Average Adjusted PTC Rating over the Average Nameplate Capacity

Solar and Storage: Incentive Calculation

- Blue - All new Solar incentive section
- Green - Modified Storage incentive section
- Purple – Combined incentive section

Incentive Calculation					
Incentive Calculation (Solar)			Incentive Step: 6		Solar Incentive Rate: \$3.10 per Watt
Base Equipment Incentive					\$14,019.19
Max Equipment Incentive				a)	\$14,019.19
Other Incentives (Solar)	Total Dollars		Impact on SGIP Incentive		
Other IOU Incentive		\$0.00		b)	\$0.00
Other Non-IOU Incentive		\$0.00		c)	\$0.00
Non-Ratepayer Incentive		\$0.00			
Investment Tax Credit		\$3,000.00			
Adjusted Equipment Incentive				a+b+c=d)	\$14,019.19
Total Other Incentives	e)	\$3,000.00			
SGIP Incentive Adjustments	Equipment Incentive +	Total Other Incentives <=	Incentive Cap(s)	Incentive Adjustment	
Eligible Cost Cap (Solar)		\$14,019.19	\$3,000.00	\$10,000.00	*f) \$7,019.19
Solar API Calls Complete	Yes				
Equipment Incentive				d+f=g)	\$7,000.00
Calculated SGIP Incentive (Solar)				h)	\$7,000.00
* f = 0 if d + e <= Total Eligible Cost, otherwise f = Total Eligible cost - (d + e)					
Incentive Calculation (Storage)			Incentive Step: 6		Storage Incentive Rate: \$1.10 per Watt-hour
Reference Table	0-2 MWH	>2-4 MWH			
0-2 HOURS	100%	50%			25%
2-4 HOURS	100%	50%			25%
4-6 HOURS	50%	25%			12.5%
Existing Onsite Equipment Offset	0-2 MWH	>2-4 MWH			>4-6 MWH
0-2 HOURS	17,097	-			-
2-4 HOURS	-	-			-
4-6 HOURS	-	-			-
			Cap		
Base Equipment Incentive					\$18,806.70
CA Manufacturer Adder					\$3,781.34
Single Family Storage Cap		\$33,000.00			
Max Equipment Incentive				i)	\$22,568.04
Other Incentives (Storage)	Total Dollars		Impact on SGIP Incentive		
Other IOU Incentive		\$0.00		j)	\$0.00
Other Non-IOU Incentive		\$0.00		k)	\$0.00
Non-Ratepayer Incentive		\$0.00			
Investment Tax Credit (0%)		\$3,000.00			
Adjusted Equipment Incentive				i+j+k=m)	\$22,568.04
Total Other Incentives	n)	\$3,000.00			
SGIP Incentive Adjustments	Equipment Incentive +	Total Other Incentives <=	Incentive Cap(s)	Incentive Adjustment	
Eligible Cost Cap (Storage)		\$22,568.04	\$3,000.00	\$10,000.00	**p) \$15,568.04
Equipment Incentive				m+p=q)	\$7,000.00
Calculated SGIP Incentive (Storage)				r)	\$7,000.00
** p = 0 if m + n <= Total Eligible Cost, otherwise p = Total Eligible cost - (m + n)					
Project Incentive Cap (All)	Solar SGIP Incentive +	Storage SGIP Incentive <=	Incentive Cap(s)		
Project Incentive Cap	\$7,000.00	\$7,000.00	\$5,000,000.00	***s)	\$0.00
Equipment Incentive (All)				h+r+s=t)	\$14,000.00
Calculated SGIP Incentive (Total)					\$14,000.00
*** s = 0 if h + r <= \$5M, otherwise s = \$5M - (h + r)					

Changes to Project Site Address

- PVWatts geolocation will use the address entered in this panel
- New question for Multifamily "How many Tenants does your project have?"
 - Triggers additional document requirements if >12.5 kWh / tenant & questions on Utility Information Panel

Project Site

+ Copy From

Site Address *

3980 Sherman Street

City *

San Diego

State

CA

Zip Code *

92110

County *

San Diego

How many tenants does your project include? *

5

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

Disadvantaged Community

☒ Agree to Location Eligibility Definition *

Save

Notes

Add Note

Resolution E5360 Justified Load field

- Effective February 18th, 2025
- New field, *Justified Load (kWh)*, required when proposed system Total Energy Storage Capacity > 15kWh (Single-Family) or 12.5 kWh/ tenant (Multifamily)
 - Document also required at upload.
 - The Energy Storage Sizing Tool can be located on the Program Provided Application Documents and Forms [here](#)
- Calculated Incentive for all Single-Family storage projects capped at 30kWh x Incentive Rate

Proposed System Information - Energy Storage

Total Energy Storage Capacity * 26.400 kWh

Discharge Hours Duration * 2.64 Hrs

Utility Information

Justified Load * 27 kWh

Is the proposed system size based on future load growth? *
☐ Yes ☒ No

Program Provided Application Documents and Forms	
Forms and Documents for Reservation Request (RRF)	Forms and Documents for Proof of Milestone (PPM)
Proposed Monitoring Plan Checklist	Renewable Fuel Affidavit
Energy Storage Preliminary Monitoring Plan Template	Directed Renewable Fuel Attestation Owner
Commercial Minimum Operating Efficiency Worksheet	Directed Renewable Fuel Attestation Supplier
Residential Minimum Operating Efficiency Worksheet	Directed Renewable Fuel Attestation Waste Gas Fuel Affidavit
Thermal Energy Storage Refrigeration kW Offset Worksheet	
CSE Authorization to Receive Customer Information (LOA)	
Multi-Family Low-Income Housing Documentation Cover Sheet	
Small Business Affidavit	
Customer Resiliency Attestation	
Electric Well Pump Attestation	
Medical Baseline Attestation	
CSLB Classifications	
Advance Payment Program Developer and Host Customer Agreement	
Energy Storage Sizing Tool	

Solar Load Justification

- Document required for Solar and Storage applications when
 - Sector = Single Family & Total Inverter AC Nameplate Capacity > 5kW
 - Sector = Multifamily & Total Inverter AC Nameplate Capacity > 5kW per tenant


RRF

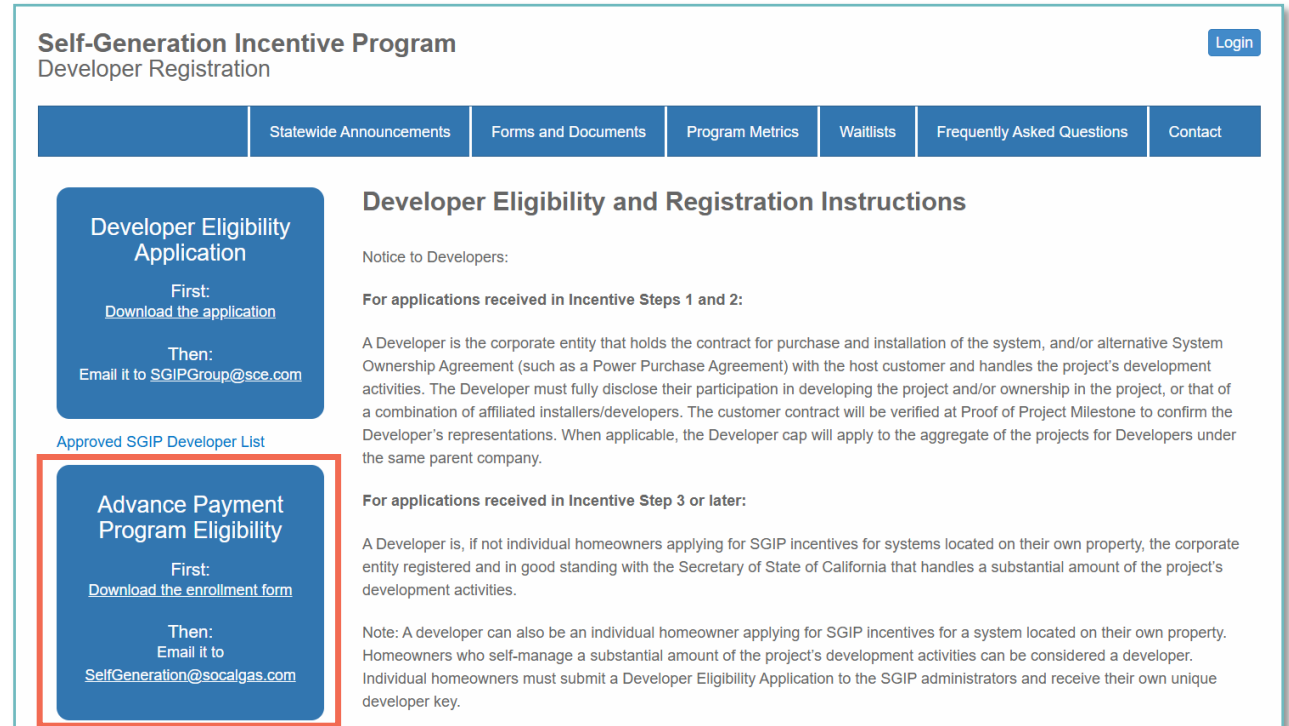
Solar Load Justification

Upload New

Notes

Advance Payment Program (APP) – Developers

- Removed old PG&E Advance Payment Pilot Program question
- Developers need to be aware of APP eligibility to be coordinated with the PAs:
 - Yearly certification
 - APP developer cap
- Developers can apply [here](#) 
 - Participating developers will be required to re-certify annually



Self-Generation Incentive Program
Developer Registration [Login](#)

Statewide Announcements | Forms and Documents | Program Metrics | Waitlists | Frequently Asked Questions | Contact

Developer Eligibility Application
First:
[Download the application](#)
Then:
Email it to SGIPGroup@sce.com

[Approved SGIP Developer List](#)

Advance Payment Program Eligibility
First:
[Download the enrollment form](#)
Then:
Email it to
SelfGeneration@socalgas.com

Developer Eligibility and Registration Instructions

Notice to Developers:

For applications received in Incentive Steps 1 and 2:

A Developer is the corporate entity that holds the contract for purchase and installation of the system, and/or alternative System Ownership Agreement (such as a Power Purchase Agreement) with the host customer and handles the project's development activities. The Developer must fully disclose their participation in developing the project and/or ownership in the project, or that of a combination of affiliated installers/developers. The customer contract will be verified at Proof of Project Milestone to confirm the Developer's representations. When applicable, the Developer cap will apply to the aggregate of the projects for Developers under the same parent company.

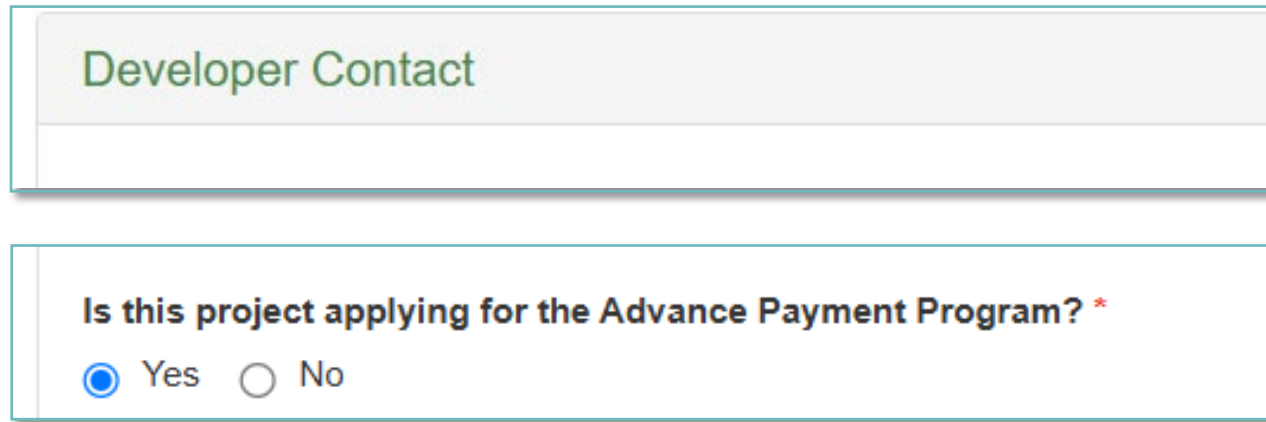
For applications received in Incentive Step 3 or later:

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.

Note: A developer can also be an individual homeowner applying for SGIP incentives for a system located on their own property. Homeowners who self-manage a substantial amount of the project's development activities can be considered a developer. Individual homeowners must submit a Developer Eligibility Application to the SGIP administrators and receive their own unique developer key.

Advance Payment Program (APP) - Applicants

- Applicants can select "Yes" to this question on the Developer Contact Panel, when submitting a new application



The image shows a screenshot of a web form titled "Developer Contact". Below the title bar, there is a question: "Is this project applying for the Advance Payment Program? *". Underneath the question, there are two radio button options: "Yes" (which is selected, indicated by a blue dot) and "No" (which is unselected, indicated by a grey dot).

- Question is hidden for ineligible Developers and Non-RSSE applications
- Selecting “yes” does not guarantee approved participation in APP
- APP Approved projects must be completed within 180 days after RRF confirmed
- APP Developer & Host Customer Agreements are located on the Program Provided Application Documents and Forms page [here](#)



Thank you

Alejandro Prieto

aprieto@energy-solution.com

Katie Freitag

kfreitag@energy-solution.com





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Q & A



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Third-Party Ownership (TPO) Consumer Protection Workshop



TPO Consumer Protection



Resolution E-5373 determines how to maximize the federal cost share of SGIP project costs covered by the federal IRA.

These changes will maximize the federal cost share of SGIP project costs covered by the federal IRA tax credits and spread SGIP funds to more projects as mandated by Decision (D.) 24-03-071.

As the IRA tax credit is currently available, the Commission finds it reasonable to make these rules based on what is currently known.



TPO Consumer Protection



The Commission clarifies that for the RSSE budget there are three pathways for residential customers to choose from:

1. The customer can own the system and claim the IRA tax credit for 30 percent of the project cost and receive an SGIP incentive for up to 70 percent of the project cost.
2. The customer can contract with a TPO developer and the TPO will monetize the tax credit at 30 to 70 percent of the project cost and receive an SGIP incentive for up to the remainder of the project cost.
3. The customer can submit documentation demonstrating why their project is ineligible to receive the IRA tax credit and why the credit could not otherwise be utilized or transferred by a third-party entity to receive the full SGIP incentive.



TPO Consumer Protection



In DAC-SASH, 91 percent of the low-income solar projects enter a TPO arrangement. A customer may choose a TPO arrangement for reasons unrelated to the upfront cost of the system such as:

- ongoing education and engagement,
- solar production online monitoring,
- and access to phone support and troubleshooting throughout the expected life of the solar electric system.

Specific to the Third-Party Ownership (TPO) model in the DAC-SASH program, baseline consumer protection standards were established that all TPO projects are required to meet.



TPO Consumer Protection



Resolution E-5373, Ordering Paragraph 11

SGIP PAs shall hold a workshop to discuss whether to require the TPO consumer protection requirements established in D.15-01-027 OP 18 in SGIP.

The SGIP PAs shall file a Tier 2 Advice Letter within six months determining whether and what TPO consumer protections should be in SGIP.



TPO Consumer Protection



TPO Model Requirements in DAC-SASH

- 1) Ensure the Program customers receive at least 50 percent of the savings, as compared to standard IOU rates, from the PV generating and storage equipment;
- 2) Reduce or eliminate barriers for customers with poor credit (low FICO score) to qualify and participate;
- 3) Address concerns that homeowners may have about moving or selling their home during the TPO contract term;
- 4) Cover maintenance, operations, inverter replacement, and monitoring;
- 5) Prohibit liens on homes;
- 6) Minimize the risk to the low-income customers that the system would be removed for delinquent payments;
- 7) Ensure that all costs are apparent and upfront and that there is no risk that the TPO deal would result in an additional financial burden to the customer;
- 8) Standardize financial terms for low-income customers where possible;
- 9) Protect the customer against terms that could change after contract signing;
- 10) Require that TPO agreements note the potential for additional costs associated with the contract, if applicable;
- 11) Require the TPO provider to clearly explain that rate changes will affect the economics of a power purchase agreement; and
- 12) Require that TPO agreement provisions spell out what happens in the event that the financing company defaults.



TPO Consumer Protection



DISCUSSION

- Developers who have previously offered, or plan on offering TPO models?
- Do you currently have any consumer protection in your TPO agreements?
- Should developers offering TPO models in SGIP be required to adhere to the TPO model consumer protection requirements used in DAC-SASH?
- Should these consumer protection requirements be adopted as a whole or in part?
- What would ensuring adequate consumer protection look like?
- Pros / Cons of implementing these requirements? Barriers?





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Thank You

