



**SCHEDULE VNEM-SOMAH**

Sheet 1

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

APPLICABILITY

Optionally available to Qualified Customers as defined in Special Condition (SC) 3, where the Owner of the property is participating in the Solar on Multifamily Affordable Housing ("SOMAH") Program, has received incentives for and installed a solar electricity generating facility through the SOMAH program that is interconnected and operates in parallel with the Utility's transmission and distribution systems that is intended primarily to offset part or all of the property's electrical requirements<sup>1</sup> (hereinafter "eligible Customer-Generator"), and contracts with the Utility to have all eligible output from the generator supplied to the Utility for the purpose of providing a credit to the Qualified Customers within the property. The terms of this schedule shall apply to any Qualified Customer that is designated by the Owner on a Solar Generation Credit Allocation Request Form 142-02768 ("Credit Allocation Form"), unless the customer provides written notification to the Utility declining to receive a credit. This Virtual Net Energy Metering-SOMAH Tariff (VNEM-SOMAH) facilitates cost savings for Owners by avoiding the installation of an eligible customer-generator on each individual dwelling unit, and also provides Qualified Customers with benefits that would otherwise be provided under Schedule NEM-ST.

This schedule shall become available to eligible SOMAH Customer-Generators and their tenants, Qualified Customers under the SOMAH program, upon request, for up to 20 years or the **end of the** life of the system, whichever **comes first**.

Accounts not fully utilizing energy allocated to them under this schedule may be eligible for additional compensation at the conclusion of their Relevant Period, as described in SC 8.

Service on this rate schedule must be taken in combination with the Qualified Customer's otherwise applicable rate schedule ("OAS").

Qualified Customers must be separately metered by San Diego Gas & Electric. Master metered customers are not eligible.

Service under this Schedule is available to an eligible Owner of an eligible Property with one or more Eligible Generators on a first-come, first-served basis while funding is available.

Qualified Customers who participate in Direct Access (DA) or Community Choice Aggregation (CCA) are eligible for service under this Schedule consistent with the services SDG&E provides to other DA and CCA Customers.

<sup>1</sup> Electrical requirements means the recorded kWh usage associated with all identified benefitting accounts over the most recent 12-month period preceding the submission of an interconnection agreement.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

TERRITORY

Within the entire territory served by the Utility.

RATES

The Qualified Customer Bill, as determined under SC 8c., is applicable, less Customer's Allocated Credit.

Qualified Customers may choose to be served under any applicable rate.

At the time the eligible Customer-Generator completes its interconnection, Qualified Customers not currently subject to Rule 12 shall be permitted to elect any applicable residential or commercial rate option. In the absence of an election, Qualified Customers will take service under SDG&E's standard applicable rate schedule. A Qualified Customer who optionally elects an applicable rate will have the option to elect a different rate at a future point, as provided for under Electric Rule 12.

In addition, under circumstances where an eligible customer-generator completes its interconnection application pursuant to this schedule prior to the date that default residential Time Of Use (TOU) rates go into effect, Qualified Customers may exercise the option to maintain their current rate by opting out of the default rate. Under circumstances where an eligible customer-generator completes its interconnection application pursuant to this schedule after the date that default residential TOU rates go into effect, residential customers may elect an applicable non-TOU applicable rate.

Residential Qualified Customers are exempt from the NEM-ST requirement to take service under a TOU rate. Residential Qualified Customers will still default to TOU rates when they are implemented for residential customers, but may choose to opt out of TOU rates. Commercial or Common area accounts associated with SOMAH projects remain subject to otherwise applicable default or mandatory TOU rates.

All eligible Qualified Customers taking service under this schedule are responsible for paying all current and future non-bypassable charges (for example, pursuant to D.16-01-04, are defined as Public Purpose Program [PPP] charges, Nuclear Decommissioning [ND] charges, the Competition Transition Charge [CTC], and the Department of Water Resources Bond Charge [DWR-BC]). These charges are calculated based on the total energy delivered by the Utility,

To accurately calculate non-bypassable charges for customers participating in SDG&E's Residential Electric Smart Meter Opt-Out program and requesting service under this Schedule, an interval data recoding (IDR) meter with no radio communications ability will be used in place of the wireless meter to provide electric service for residential customers who elect this option.

SDG&E rates and rate design, including the rates and rate design reflected in this Tariff, are subject to change from time to time. Customers should take this into consideration when making any long-term decisions based on rate structures that are currently in place.

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**SCHEDULE VNEM-SOMAH**

Sheet 3

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS

1. Definitions: The Definitions of terms used in this schedule are found either herein or in Rule 1.
2. Treatment of Generation: Eligible customer-generators that are installed and utilized in providing service under terms of this rate schedule shall be treated as though they were installed and utilized under terms of Schedule NEM-ST, unless otherwise specified herein.
3. Qualified Customer: Is a customer that is receiving service on a rate schedule that would be applicable to a similar customer receiving service in combination with Schedule NEM-ST and meets one of the following conditions:
  - a) is a separately metered tenant located on a property participating in the SOMAH program as determined by the Program Administrator or
  - b) is the Customer Generator participating in SOMAH as determined by the Program Administrator. The Qualified Customer definition shall extend to Customer Generator for the purpose of billing common use areas and unoccupied units.
4. Customer Generator Owner: The Enterprise, or Entity, that owns the property that makes it eligible for participation in the SOMAH program.
5. Property: All of the real property and apparatus employed in a single low-income housing enterprise on contiguous parcels of land and deemed eligible by the Program Administrator, within the applicable program rules.

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San Diego, California

Original Cal. P.U.C. Sheet No. 30304-E

Canceling Cal. P.U.C. Sheet No.

**SCHEDULE VNEM-SOMAH**

Sheet 4

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

6. Generator Interconnection Responsibility: To be eligible for VNEM-SOMAH service, the Owner shall have an effective interconnection agreement with the Utility and have submitted a Solar Generation Credit Allocation Request, Form 142-02768 ("Credit Allocation Request"), to the Utility. In addition, the Owner shall have paid all costs associated with the Utility installing a Generator Output Meter capable of recording in 15 minute increments, any wiring, trenching, conduit, or other facility costs incurred by the Utility to interconnect with the Owner's eligible customer-generator adjusted based on Rule 2 factors for a one-time payment. The location of the customer's Generator Output Metering equipment shall be approved by the Utility, and will normally be grouped with the service and metering equipment for one, or more, of the tenant or common area meters. Eligible customer-generators whose system capacity is equal to or less than one MW shall be responsible for paying an interconnection fee of \$132.00. Eligible customer-generators whose system capacity exceeds one MW shall be responsible for paying an interconnection fee of \$800.00. Additionally, all customers installing a solar electricity generating facility with a capacity in excess of 1 MW shall be subject to Network and/or Distribution upgrade costs in accordance with Rule 21.

If there is any load behind the Generation Output Meter in addition to incidental load related to the operation of the eligible customer-generator, SDG&E reserves the right to require, at the Owner's expense, the purchase and installation of metering equipment necessary to determine the total generation and total usage at the interconnection point. Such usage shall be billed as a common area account to ensure that all eligible generation output is allocated and that netting only occurs after credits have been allocated.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

7. Solar Generation Credit Allocation Request Form (Form 142-02768): A form completed by the Owner that designates how the Energy Exported, as defined in SC 9, will be allocated among the tenants and common use of the property. The initial Owner-designated percentage split between common use and tenants shall become effective on the regularly scheduled monthly meter read date closest to the date on which the form is received by the Utility and will remain in effect for a minimum of 20 years, or for the life of the system if less than 20 years. The designated allocation between tenant units shall remain in effect for a minimum of twelve months. The Owner may submit an updated form to revise these allocations thereafter as allowed by the SOMAH program. These additional adjustments must also remain effective for at least twelve months. Modified Credit Allocation Requests shall become effective on the first regularly scheduled monthly meter read date that is at least 15 days following receipt by the Utility.

The SOMAH Program Administrator shall bear responsibility for ensuring that the percent allocations for individual Qualified Customers are based on the relative size of the tenant's unit, consistent with the manner in which credits are allocated per the SOMAH program's rules. Per the program rules, each tenant unit in the property must receive a percent allocation of the total tenant-designated credit. Credit that is allocated to a particular unit, but not applied to a Qualified Customer's bill due to occupant nonparticipation or unit vacancy (no active account) will be retained by the Utility. To retain credits on vacant units, the Owner shall not be precluded from executing a Continuity of Service Agreement (Form 124-463) so that the generation allotted to a benefiting premise will be applied to the Owner's account, after a tenant terminates service.

8. Billing Process: The following billing process shall be used.

- a) Energy Exported: The metered output, delivered to the grid, as recorded by the Generator Output Meter and validated by the appropriate Utility billing processes during the specific billing period.
- b) Allocation of Credit: Monthly allocated Credits for common areas and Qualified Customers are determined by multiplying the monthly Energy Exported (kWh) by the percentages contained in the Credit Allocation Request on file with the Utility, and then converting each kWh credit to dollars using the Qualified Customer's OAS.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

8. Billing Process: The following billing process shall be used (continued).

- c) Qualified Customer Bill: The OAS for each Qualified Customer, adjusted to conform to the conditions set forth in Schedule NEM-ST. Qualified Customers served under this schedule are responsible for all charges from their OAS including monthly billed minimum charges, customer charges, meter charges, facilities charges, energy and demand charges, excluding any adjustments due to power factor provisions. Applicable demand charges are defined in the OAS. Any non-bypassable charges shall be billed based on the total energy delivered by the Utility.
- d) Virtual Net Energy Metering and Billing: VNEM means measuring the difference between the electric energy supplied by the Utility to Qualified Customers and the electric energy generated by an eligible customer-generator, fed to the electric grid, and credited to Qualified Customers over a 12-month period (Relevant Period).

At the end of each Relevant Period , the Qualified Customer shall be billed for net electric energy used during that period and the non-bypassable charges for the total energy delivered by the utility. If a Qualified Customer terminates service under this rate schedule prior to the end of any Relevant Period, the Utility shall reconcile the customer's consumption of electric energy with any remaining credit, and bill the customer as if it were the end of the normal Relevant Period.

(1) For an OAS with Baseline Rates:

If the Qualified Customer is a net consumer for the month, the net kWh consumed shall be billed in accordance with the Qualified Customer's OAS. If the Qualified Customer is a net generator, the net kWh generated shall be valued at the applicable baseline rates up to the billing period's baseline allowance, with any excess kWh generated valued at the applicable non-baseline rates. Any non-bypassable charges shall be billed based on the total energy delivered by the Utility.

(2) For an OAS with Time-of-Use Rates

If the Qualified Customer is a net consumer during any discrete TOU period, the net kWh consumed shall be billed at the applicable TOU rates charged in the OAS. If the Qualified Customer is a net generator, the net kWh generated shall be valued at the applicable TOU rates charged in the OAS. Any non-bypassable charges shall be billed based on the total energy delivered by the Utility.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

8. Billing Process: The following billing process shall be used (continued)

- e) Net Surplus Compensation: A NEM-ST customer with "net surplus electricity" (all electricity generated by an eligible customer measured in kilowatt-hours over a 12-month period that exceeds the amount of electricity consumed by that eligible customer), is eligible to receive net surplus compensation ("NSC"), valued in accordance with the methodology adopted in D.11-06-016. If a customer has not generated excess kWhs, the customer is not eligible for NSC.
- f) Compensation for net surplus energy: SDG&E will compensate eligible Qualified Customers with excess kWhs at the end of their relevant period for both the value of the electricity and the value of the renewable attributes. The utility will provide compensation for net surplus generation using the following formula:

NSC = Value of Electricity + Value of Renewable Energy Credits (if applicable)

(1) Value of the Electricity -

Value of Electricity = Net surplus kWhs x DLAP price

The utility will use SDG&E's Default Load Aggregation Point (DLAP) price as the basis for the net surplus compensation rate (adopted in D.11-06-016). DLAP reflects the costs the utility avoids in procuring power during the time period net surplus generators produce excess power.

This rate is the simple rolling average of SDG&E's DLAP price from 7 a.m. to 5 p.m. corresponding to the customer's 12-month relevant period. The rolling average will be calculated on a monthly basis and be applied to all customers with a relevant period in the following month.

The utility uses a full 12 months of DLAP prices, as published on the CAISO Open Access Same-time Information System (OASIS), ending the twentieth (20th) day of each month. The utility then calculates the net surplus compensation rate within five days of the first of the month to allow the CAISO to finalize the day-ahead DLAP prices. This rate is applied to all eligible net surplus generators, irrespective of their rate class.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

8. Billing Process: The following billing process shall be used (continued)

f) Compensation for Net Surplus Energy (continued)

(2) Value of Renewable Energy Credits –

Value of Renewable Energy Credits = Net surplus kWhs x Average Renewable Premium

The California Energy Commission (CEC) has determined the eligibility of net energy metering customer facilities for the Renewables Portfolio Standard (RPS) and developed an ownership verification and tracking process for Renewable Energy Credits (RECs) created by net surplus generators, which is set forth in the CEC's RPS Eligibility Guidebook, available at: <http://www.energy.ca.gov/renewables/documents/#rps>

The Utility will include a Renewable Attribute Adder (RAA) with the NSC rate if the eligible customer has: (1) certified ownership of RECs associated with his net surplus generation and provides this certification to the Utility; (2) obtained RPS certification from the CEC for his renewable electrical generation facility and provides this certification to the Utility; and (3) transfers the ownership of the RECs associated with his net surplus electricity to the Utility using the Western Renewable Energy Generation Information System (WREGIS). To effectuate these requirements, Customers requesting Utility compensation for the RAA must complete the Net Energy Metering Renewable Energy Credits Compensation Agreement (Form 182-1000).

The renewable attribute adder will be calculated using the most recent Western Electricity Coordinating Council (WECC) average renewable premium, based on United States Department of Energy (DOE) published data. The renewable attribute adder will only be paid to those net surplus generators who provide RECs to the Utility. This rate will be updated annually and is available at: <http://www.sdge.com/nem>.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

8. Billing Process: The following billing process shall be used (continued)

f) Compensation for Net Surplus Energy (continued)

(2) Value of Renewable Energy Credits – (continued)

In accordance with the process established in D.11-06-016, Qualified Customers who elect to receive NSC must notify the Utility that they are a Qualifying Facility exempt from certification filing at the Federal Energy Regulatory Commission (“FERC”). Since all eligible customer-generators with net power production capacities of 1 MW or less, currently meet the requirements for a qualifying facility exempt from certification filing at FERC by being under 1 MW (under FERC Order 732), SDG&E requires no additional documentation at this time. NEM-ST customers interconnecting a REGF with a capacity greater than 1 MW that are also electing to receive Net Surplus Compensation shall provide notice to the Utility that it is self-certifying such facility as a Qualifying Facility pursuant to the Public Utility Regulatory Policies Act of 1978 by properly completing and filing FERC Form No. 556 with the FERC. FERC Form No. 556 is not a requirement of interconnection.

Eligible Qualified Customers have the option to carry over NSC to future 12-month periods (as a bill credit) or can elect a monetary payment, if the amount is greater than one dollar (\$1). Payments for NSC shall be reduced by any amount the customer owes to the utility.

g) Greenhouse Gas Allowance Revenue Return: For customers eligible under Schedule GHG-ARR, volumetrically-based California (CA) Climate Credits will net when customers generate. Checks issued to NEM customers electing an off-bill payment for Net Surplus Compensation will incorporate any remaining CA Climate Credits.

9. Monthly Billing: The Utility shall provide Qualified Customers with eligible customer-generator production and individual consumption information with each regular monthly bill. The information shall include the current monetary balance owed to the Utility for the net energy consumed in the current Relevant Period. Qualified Customers shall pay any balance due for net energy consumed monthly. Any remaining credit over a monthly billing cycle shall be carried over to the following monthly billing period, until the end of the Relevant Period.

Qualified Customers shall not be eligible for the Level Pay Plan option set forth in Rule 9.

10. Generator Limitation: Except as otherwise provided for under this schedule, no generator shall be included behind the above described Generator Output Meter other than a Solar Generator.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

11. Any Customer Generator participating in SOMAH with a new solar electricity generating facility who enters into a new net energy metering contract (for example, form 142-02760.5 Interconnection Agreement for Virtual Net Energy Metering for SOMAH) shall submit a completed form 142-02763 – NEM/VNEM Inspection Report (“Inspection Report”) to SDG&E. The Inspection Report shall be prepared by a California licensed contractor who is not the owner or operator of the facility and meter. A California licensed electrician shall perform the inspection of the electrical portion of the facility and meter and sign the Inspection Report. If an inspection is required, the customer shall submit the fully completed Inspection Report to SDG&E within 90 days of the customer becoming the customer of record at this account, or else the customer agrees to disconnect its Generating Facility and inform SDG&E it no longer will take service under net energy metering rate Schedule NEM-ST or Schedule VNEM-SOMAH. By signing the Interconnection Agreement, the Inspection Report shall be incorporated into the Interconnection Agreement.

12. VNEM-SOMAH Grandfathering Provisions

This Special Condition is applicable to all Qualified Customers receiving service on this Schedule or where the Owner or Operator has submitted all documentation necessary to receive service on this Schedule.

a) System Modifications - Generating Facilities eligible for the program that are modified and/or repaired shall remain eligible for the remainder of the 20-year life of the system period if 1) the modifications and/or repairs do not increase the Generating Facility by more than the greater of (a) 10 percent of the SOMAH Generating Facility’s nameplate rating capacity, as established when the Generating Facility was originally interconnected, or (b) 1 kW; and 2) provided the modifications and/or repairs do not result in the Generating Facility exceeding the Customer’s annual onsite load. Qualified Customers making modifications and/or additions to their Generating Facilities that exceed the 10 percent or 1 kW limit referenced above have the option of either metering the additions and/or modifications separately under another eligible tariff, or having the entire Generating Facility served under another eligible tariff, subject to the terms and conditions contained therein.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

12. VNEM-SOMAH Grandfathering Provisions (continued)

- b) Ownership Transferability - Generating Facilities eligible for bill credits for the life of the program, and up to a 20-year life of the system period, shall not lose their eligibility if transferred to a new owner, operator, or SDG&E account, provided the Generating Facility is eligible for the SOMAH program and participants are deemed eligible by the Program Administrator, and remains at its original location. The transfer of an existing Generating Facility to a new location is considered a new installation requiring a new Interconnection Agreement that is subject to the applicable tariffs in place at the time the new Interconnection Request is completed.
- c) Paired Energy Storage Systems - To the extent that eligible energy storage systems are considered an addition or enhancement to the Generating Facility served under this Schedule, the energy storage systems shall be treated in the same way, and subject to the same transition period, as the Generating Facilities to which they are connected.

13. Temporary Applicability Limitation for Schedule VNEM-SOMAH

All Qualified Customers in a single VNEM-SOMAH arrangement who take service in combination with a TOU rate must take service on the same TOU rate structure (i.e., a 3 period TOU structure with a 4pm-9pm on-peak period). If the VNEM arrangement includes a meter served under an agricultural rate then all Qualified Customers in the VNEM-SOMAH arrangement must be served under 3 period TOU structure with an 11am-6pm on-peak period. These limitations will apply until such time that SDG&E has developed the system capability to accommodate both TOU rate structures in a single VNEM arrangement.

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**SCHEDULE VNEM-SOMAH**

VIRTUAL NET ENERGY METERING - SOLAR ON MULTIFAMILY AFFORDABLE HOUSING (VNEM-SOMAH)

SPECIAL CONDITIONS (continued)

14. VNEM-SOMAH Paired Storage is defined as an energy storage device paired with a renewable electrical generating facility that meets the Renewables Portfolio Standard Guidebook<sup>2</sup> (RPS Guidebook) requirements to be classified as an “addition or enhancement”, as described below, that is equipped with a physical, non-import relay or a functionally equivalent non-import configuration, as described in [SDG&E’s Electric Distribution System Interconnection Handbook](#).

a) Types of VNEM-SOMAH Paired Storage

The RPS Guidebook establishes two categories of energy storage that may be considered an addition or enhancement to a renewable electrical generation facility: “integrated” and “directly connected” storage.

- (i) Integrated Storage: Integrated Energy Storage is defined as a method of storing energy from a renewable energy resource that is integrated into the renewable electrical generating facility as part of the generation process. For example, in order to be defined as integrated, a battery based storage device must be capable of storing energy from only the renewable electrical generating facility.
- (ii) Directly Connected: Directly Connected Storage is defined as being both: (i) directly connected to the renewable electrical generating facility via an internal power line (i.e., power may not be transmitted from the renewable facility to the energy storage via an external distribution line) and (ii) the storage device must be operated as part of the renewable electrical generating facility.

b) VNEM-SOMAH Paired Storage Interconnection Cost Responsibility

VNEM-SOMAH Paired Storage will be subject to the same interconnection cost responsibility as the renewable electrical generating facility that it is paired with. In the event the storage device is added at a date later than the date permission to operate the renewable electrical generating facility was issued, the customer will be required to pay the same interconnection fees and costs that the renewable electrical generation facility would be required to pay, as provided for in Electric Rule 21.

<sup>2</sup> [www.energy.ca.gov/renewables/documents/index.html#rps](http://www.energy.ca.gov/renewables/documents/index.html#rps)

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