



Schedule MASH-VNM-ST Sheet 1  
MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
SUCCESSOR TARIFF

APPLICABILITY

This Schedule is applicable to Qualified Customers served on time-of-use (TOU) rates whose Service Account(s) are located at a Residential Complex on the same Premises upon which one or more Eligible Generators have been installed pursuant to California Public Utilities (PU) Code Section 2827.1 and California Public Utilities Commission (Commission) Decision (D.)16-01-044, subject to the additional terms and conditions contained herein and any other applicable state or federal laws; and for which the Owner or Operator of the Residential Complex contracts with SCE to have all eligible energy produced by the Eligible Generator(s) supplied to SCE for the sole purpose of providing Allocated Credits to the Residential Complex's Common Area and/or Tenant Service Accounts to offset their billed energy usage. Service under this Schedule is available on a first-come, first-served basis to Qualified Customers upon (a) SCE reaching its NEM trigger level in accordance with PU Code Section 2827(c)(4)(B)(ii) or (b) July 1, 2017, whichever is earlier. Qualified Customers who are receiving service on this Schedule, or who have submitted all documentation necessary to receive service on this Schedule, are subject to the grandfathering provisions provided in Special Condition 9 below.

Qualified Customers who participate in Direct Access (DA), Community Choice Aggregation (CCA) or Community Aggregation (CA) Service are eligible for service under this Schedule consistent with the NEM services that SCE provides to its Bundled Service Qualified Customers, except as otherwise provided herein, provided the Qualified Customer's Electric Service Provider (ESP), Community Choice Aggregator or Community Aggregator offers a NEM tariff or program consistent with the provisions of this Schedule. DA, CCA or CA Service Qualified Customers must look to their ESP, Community Choice Aggregator or Community Aggregator for NEM services related to the generation charges and credits that result from receiving service under this Schedule.

This Schedule is also applicable to Qualified Customers whose Eligible Generators meet the definition of a NEM-Paired Storage System as defined in Special Condition 1.h below. Such (N)  
Qualified Customers shall be additionally subject to the provisions of Special Condition 6 below. (N)

TERRITORY

Within the entire territory served.

(Continued)

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Schedule MASH-VNM-ST Sheet 2  
MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

RATES

All terms and conditions of the Qualified Customer's Otherwise Applicable Tariff (OAT) apply except that the NBCs, Allocated Credits and NSC for which this Schedule provides will be applied to the monthly bills for all eligible Common Area and/or Tenant Service Accounts designated by the Owner or Operator. An Allocated Credit, as further described in Special Condition 5.b below, is determined by multiplying the kilowatthours (kWh) that the designated Eligible Generator(s) delivers to the grid by the allocation percentages that the Owner or Operator designates in the Allocation Request Form for the Common Area and/or Tenant Service Accounts located at the Residential Complex. The Allocated Credit is then used to reduce the energy billed to the Qualified Customer.

1. Mandatory TOU Rates.

- a. Qualified Customers must receive service on a TOU rate schedule (which is then considered the Qualified Customer's OAT for the purpose of this Schedule), with no exceptions and no option to opt-out to an underlying rate option that is not time differentiated, at the time the Qualified Customer begins service on this Schedule, except as provided in 1.e below.
- b. The default TOU rate for Residential Qualified Customers taking service under this Schedule is Schedule TOU-D, Option A, though Residential Qualified Customers may elect another TOU rate option for which they are eligible.
- c. Residential Qualified Customers who are served under this Schedule or for whom the Owner or Operator submits all documentation necessary to receive service under this Schedule prior to the implementation of default Residential TOU rates in SCE's service territory (expected to be in 2019, subject to Commission direction) have the option to stay on the TOU rate that they are served on at that time for a period of five years from the date the Qualified Customer commenced service on that TOU rate.
- d. Any Residential Qualified Customer for whom the Owner or Operator submits all necessary documentation for service under this Schedule after default Residential TOU rates have been implemented in SCE's service territory (expected to be in 2019, subject to Commission direction) shall be put on the appropriate default TOU rate as a condition of receiving service under this Schedule. Such Qualified Customers may opt out of their default TOU rate, but must switch to another available TOU rate for which they are eligible in order to continue receiving service under this Schedule.
- e. Residential Qualified Customers for whom an eligible TOU rate option does not exist are eligible for service on this Schedule while on a non-TOU rate but must begin receiving service on a TOU rate option for which they are eligible as soon as one becomes available in order to continue receiving service on this Schedule.

(Continued)

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Schedule MASH-VNM-ST Sheet 3  
MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

RATES (continued)

2. Nonbypassable Charges (NBCs).

For the purpose of this Schedule only, NBCs include the following rate components, as provided in the Qualified Customer's OAT: (1) Public Purpose Programs Charge (PPPC), (2) Nuclear Decommissioning Charge (NDC), (3) Competition Transition Charge (CTC), and (4) Department of Water Resources (DWR) Bond Charge.

As determined in each billing period, a Qualified Customer is responsible for NBCs, assessed on a \$-per-kWh basis using the NBC factors contained in the Qualified Customer's OAT, for each kWh of electricity that is consumed/imported from the grid (i.e., Es, as defined below) in each metered interval (e.g., one hour or 15-minute). Allocated Credits cannot be used to offset or net the kWh on which a Qualified Customer's NBCs are based.

For DA, CCA or CA Service Qualified Customers, the CTC and DWR Bond NBC components are based on the factors contained in Schedules DA-CRS and CCA-CRS, as applicable, and the PPPC and NDC NBC components are based on the factors contained within the Qualified Customer's OAT. NBCs are assessed on a \$-per kWh basis for each kWh of electricity that is consumed/imported from the grid (i.e., Es, as defined below) in each metered interval (e.g., one hour or 15-minute). Allocated Credits cannot be used to offset or net the kWh on which these Qualified Customers' NBCs are based.

For Residential Qualified Customers, the assessed NBCs will be used in the Minimum Charge calculation consistent with how these components are used in the Minimum Charge calculation for non-NEM Residential customers.

Qualified Customers who receive service on California Alternate Rates for Energy (CARE) or who receive a Medical Baseline Exemption are currently exempt from the DWR Bond Charge. Therefore, the DWR Bond Charge component of the NBCs for these Qualified Customers under this Schedule is \$0.00.

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Schedule MASH-VNM-ST Sheet 4  
MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

RATES (continued)

3. Monthly Energy (kWh) Charges and Credits.

As determined in each billing period, when a Qualified Customer is a net consumer of energy,  $E_s$  is greater than  $E_f$ , where  $E_s$  is energy supplied from the grid and  $E_f$  is the Allocated Credit, the resulting net consumed energy will be used in the calculation of all applicable energy charges, with the exception of the NBCs as outlined above, calculated by (1) multiplying the Qualified Customer's net consumed kWh by the applicable energy rate components of the Qualified Customer's OAT, in each TOU period, for Bundled Service Qualified Customers, or (2)(a) multiplying the Qualified Customer's net consumed kWh by the applicable Delivery Service rate components of the Qualified Customer's OAT, in each TOU period, and (b) multiplying the Qualified Customer's net consumed kWh by the applicable Cost Responsibility Surcharge (CRS) rate components (e.g., PCIA) of Schedules DA-CRS or CCA-CRS that are not defined as NBCs above, in each TOU period, for DA, CCA or CA Service Qualified Customers. The Qualified Customer's ESP or Community Choice Aggregator/Community Aggregator is responsible for providing the generation-related energy charges. NBCs, as defined above, are not included as part of these calculations.

As determined in each billing period, when a Qualified Customer is a net producer of energy,  $E_f$  is greater than  $E_s$ , the resulting net produced energy will be used in the calculation of energy credits, calculated by (1) multiplying the Qualified Customer's net produced kWh by the applicable energy rate components of the Qualified Customer's OAT, in each TOU period, for Bundled Service Qualified Customers (though in no case can Allocated Credits result in the reduction of the NBCs owed by the Qualified Customer), or (2)(a) multiplying the Qualified Customer's net produced kWh by the applicable Delivery Service rate components of the Qualified Customer's OAT, in each TOU period, and (b) multiplying the Qualified Customer's net produced kWh by the applicable CRS rate components (e.g., PCIA) of Schedules DA-CRS or CCA-CRS that are not defined as NBCs above, in each TOU period, for DA, CCA or CA Service Qualified Customers (though in no case can Allocated Credits result in the reduction of the NBCs owed by the Qualified Customer). The Qualified Customer's ESP or Community Choice Aggregator/Community Aggregator is responsible for providing the generation-related energy credits. NBCs, as defined above, are not included as part of these calculations.

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Schedule MASH-VNM-ST Sheet 5  
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(Continued)

RATES (continued)

4. Net Surplus Compensation (NSC).

Net Surplus Compensation (NSC) is equal to the Net Surplus Compensation Rate (NSCR) multiplied by Net Allocated Surplus Energy. To calculate NSC, the kWh of Net Allocated Surplus Energy are multiplied by the NSCR. The NSCR is based on the default load aggregation point (DLAP) price, and is equal to the simple rolling average of SCE hourly \$-per-kWh prices from the Hour Ending 08 through the Hour Ending 17 (7 a.m. to 5 p.m.) for each day of the 12-month period corresponding to the Qualified Customer's 12-month Relevant Period. The rolling average is calculated on a monthly basis to be effective the first of each month and is applied to all Qualified Customers with a Relevant Period ending in that month. SCE uses a full 12 months (365 days, or 366 days for leap years) of DLAP prices, as published on the California Independent System Operator (California ISO) Open Access Same-time Information System (OASIS), ending the twentieth (20th) day of each month. SCE then calculates the NSCR within five days of the first of the month to allow the California ISO to finalize the day-ahead DLAP prices. The NSCR is applied to all eligible Qualified Customers with Net Allocated Surplus Energy, irrespective of their rate class. The NSCR is posted on SCE's website and updated monthly.

See Special Condition 5.g below for specific terms and provisions regarding NSC.

NSC Renewable Attribute Adder (RAA)

Pursuant to D.11-06-016, SCE will include a Renewable Attribute Adder (RAA) with the NSC rate if the Owner or Operator or an aggregator provides a completed Form 14-935 (see Special Condition 5.g.iv below) verifying that the Qualified Customer: (1) has registered the Eligible Generator at the Western Renewable Energy Generation Information System (WREGIS); (2) has obtained Renewables Portfolio Standard (RPS) ownership certification from the California Energy Commission (CEC) for the Qualified Customer's Net Allocated Surplus Energy and provides this certification to SCE; and (3) allows for the ownership of the Renewable Energy Credits (RECs) associated with the Qualified Customer's Net Allocated Surplus Energy to be transferred to SCE. For details on the CEC and WREGIS certification process, refer to the CEC's RPS Eligibility Guidebook, which can be found at:

<http://www.energy.ca.gov/renewables/documents/#rps>.

The RAA 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 RAA will only be paid to those Qualified Customers who provide RECs to SCE.

Value of RECs = Net Allocated Surplus kWh x RAA.

The RAA will be updated annually and is available at:

<https://www.sce.com/wps/portal/home/regulatory/tariff-books/rates-pricingchoices/renewable-energy-credit>.

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Schedule MASH-VNM-ST Sheet 6  
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(Continued)

RATES (continued)

4. Net Surplus Compensation (NSC). (continued)

At the conclusion of each Relevant Period, the eligible Qualified Customer will notify SCE that the Qualified Customer has transferred the RECs associated with the Net Allocated Surplus Energy in WREGIS by completing Form 14-935 and will send the CEC RPS certificate with the form to SCE.

5. Standby and Customer Generation Departing Load Charges.

No additional Standby or Customer Generation Departing Load charges are currently applicable to Qualified Customers served under this Schedule, as provided in SCE's Standby and Customer Generation Departing Load tariffs.

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Schedule MASH-VNM-ST  
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Sheet 7

(Continued)

SPECIAL CONDITIONS

1. Definitions: Except as otherwise defined in SCE's Electric Rule 1, capitalized terms utilized in the context of this Schedule are defined below and applicable to Qualified Customers receiving service under this Schedule.
  - a. Qualified Customer. A Qualified Customer is either: (i) the Owner or Operator of a Residential Complex that is qualified to participate under the Multifamily Affordable Solar Housing (MASH) program or the New Solar Homes Partnership (NSHP) who may or may not have received MASH incentive funding; (ii) the Owner or Operator of a Residential Complex whose name is on the TOU Service Account(s) of the common areas of the Residential Complex; or (iii) a tenant of the Residential Complex with a separate TOU Service Account.
  - b. Owner. An Owner is the Qualified Customer who has the legal right or rightful claim to ownership of the Residential Complex and who has one or more Eligible Generator(s) located on the Premises.
  - c. Operator. An Operator is a Qualified Customer who operates a business by leasing or renting the Residential Complex from an Owner and who has one or more Eligible Generator(s) located on the Premises.
  - d. Common Area Service Accounts. Accounts served on TOU rates for which electrical service is provided to the common areas of the Residential Complex, which may include electrical service for recreation facilities, parking and walkway lighting, landscaping, elevator and laundry rooms.
  - e. Tenant Service Accounts. Accounts on TOU rates for which electrical service is provided to the tenants of the Residential Complex.
  - f. Residential Complex. A Residential Complex is defined as all of the real property and apparatus employed in a single low income housing enterprise on contiguous parcels of land, which may be divided by a dedicated street, highway or public thoroughfare or railway, so long as the parcels are otherwise contiguous and part of the same single low income housing enterprise, and are all under the same ownership. The Residential Complex must satisfy one of the following two definitions:
    - i. Multifamily Affordable Solar Housing: Residential housing that satisfies the criteria for low-income residential housing as provided in PU Code Section 2852(a)(3).
    - ii. New Solar Homes Partnership (NSHP): As defined in Public Resources Code Sections 25401.6 and 25744, residential housing that qualifies as affordable housing projects in communities with a plurality of minority or low-income populations and that utilizes eligible distributed emerging technologies including, but not limited to, projects undertaken pursuant to Section 50052.5, 50053, or 50199.4 of the Health and Safety Code.

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Schedule MASH-VNM-ST Sheet 8  
MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

SPECIAL CONDITIONS (continued)

1. Definitions. (continued)

g. Eligible Generator(s).

- i. A solar electrical generating facility that is: (A) located on the Owner or Operator's Residential Complex Premises; (B) interconnected and operates in parallel with the electric grid; and, (C) intended primarily to offset part or all of the Owner or Operator's own electrical requirements and/or requirements of the tenants of the Residential Complex.
- ii. To be eligible for service under this Schedule, Eligible Generators must meet all applicable safety and performance standards established by the National Electrical Code, the Institute of Electrical and Electronics Engineers, and accredited testing laboratories such as Underwriters Laboratories and, where applicable, rules of the Commission regarding safety and reliability (i.e., SCE's Electric Rule 21). All Eligible Generators must have a warranty of at least 10 years for all equipment and the associated installation from the system provider (not from SCE).<sup>i</sup> Additionally, all major solar system components (including PV panels and other generation equipment, inverters and meters) must be on the verified equipment list maintained by the CEC. Any other equipment, as determined by SCE, must be verified as having safety certification from a Nationally Recognized Testing Laboratory (NRTL).
- iii. Sizing. Qualified Customers' Eligible Generators must meet the sizing requirements as outlined below in order to be eligible for service under this Schedule.
  - A. Sized to Load Requirement (Annual Solar Energy Credit): The total energy (in kWh) estimated to be recorded by the generation output meter(s) on the Eligible Generator(s) and allocated to the Qualified Customers must not exceed the total estimated energy usage (in kWh) for the common area meters and tenant meters for the next twelve months for a new Residential Complex, or the previous twelve months' recorded energy usage for an existing Residential Complex. Compliance with this requirement will be determined at the onset of the program when SCE conducts an energy audit of the Qualified Customer's Residential Complex.

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<sup>i</sup> Warranties or service agreements conforming to requirements applicable to the Self-Generation Incentive Program (SGIP) may be used for technologies eligible for the SGIP. In appropriate circumstances conforming to industry practice, this requirement may also rely on and be satisfied by manufacturers' warranties for equipment and separate contractors' warranties for workmanship (i.e., installation).

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Schedule MASH-VNM-ST Sheet 9  
MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
SUCCESSOR TARIFF

(Continued)

SPECIAL CONDITIONS (continued)

1. Definitions. (continued)

g. Eligible Generator(s). (continued)

iii. Sizing. (continued)

B. Capacity: The sum of the capacities of all Eligible Generators is limited to the cumulative peak loads of all Service Accounts within the Residential Complex. No generator other than the Eligible Generator can be connected behind the single meter that is used to meter the load and generation output of each Eligible Generator. Primarily for the purposes of interconnection, interconnection cost responsibility (as outlined in SCE's Electric Rule 21) and NSC eligibility (as outlined in Special Condition 5.g below), certain provisions apply differently to Eligible Generators served under this Schedule depending on whether they have a capacity of (1) 1 MW or less or (2) greater than 1 MW. Both the CEC-AC rating and the aggregate inverter capacity must not be greater than 1 MW for an Eligible Generator to be considered a 1 MW and smaller Eligible Generator.

h. NEM-Paired Storage System. An Eligible Generator that includes solar PV and an Integrated or Directly Connected Energy Storage Device(s) behind the same SCE revenue meter and/or Service Account. Integrated or Directly Connected Energy Storage Devices are considered an addition or enhancement to the solar PV and not a separate generating facility for the purposes of applying the cost exemptions specified in Special Condition 6 below when interconnecting at the same time as the solar PV. (N)

An energy storage device shall be considered an addition or enhancement to the solar PV if the energy storage device is either:

i. Integrated into the Eligible Generator, such that the energy storage device is capable of storing only energy produced by the solar PV, either as an intermediary form of energy during the generation cycle or after electricity has been generated (Integrated Energy Storage Device); or,

ii. Directly connected to the Eligible Generator, such that electricity is delivered from the solar PV to the energy storage device behind the meter used for RPS purposes and any electricity from a source other than the solar PV is included as an energy input to the Eligible Generator; the energy storage device must be operated as part of the Eligible Generator represented in the application and not in conjunction with any other facility, renewable or otherwise (Directly Connected Energy Storage Device). As such, a Directly Connected Energy Storage Device is not required to be charged exclusively from the solar PV and may also be charged from the grid.

i. Large NEM-Paired Storage System. A NEM-Paired Storage System where the Integrated or Directly Connected Energy Storage Device(s) is sized larger than 10 kW (AC) (i.e., maximum aggregate discharge capacity) and that meets the applicable sizing and metering requirements included in Special Condition 6 below. (N)(L)

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Schedule MASH-VNM-ST Sheet 10 (N)  
MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

SPECIAL CONDITIONS (continued)

1. Definitions. (continued)

- j. Small NEM-Paired Storage System. A NEM-Paired Storage System where the Integrated or Directly Connected Energy Storage Device(s) is sized 10 kW (AC) or smaller (i.e., maximum aggregate discharge capacity) and that meets the applicable sizing and metering requirements included in Special Condition 6 below. (N)
- k. Relevant Period. A twelve-month period, or portion thereof, commencing on the start of the next regular billing period following the Date of Parallel Operation of the Owner or Operator's Eligible Generator(s) to SCE's electric system, for purposes of participating in the MASH program, and on every subsequent anniversary thereof. For Qualified Customers electing to receive service under this Schedule for an Eligible Generator(s) that is already interconnected to SCE's electrical system, the Relevant Period will commence on the date that the Qualified Customer begins receiving service under this Schedule and on every subsequent anniversary thereof. Additionally, the following provisions apply: (L)(T)
  - i. If a Qualified Customer terminates service or if the identity of the Qualified Customer changes before the end of a Relevant Period, the Relevant Period for that Qualified Customer's Service Account will consist of that period from the Date of Parallel Operation, or a subsequent anniversary date, until the effective date of termination or change of identity. If the identity of the Qualified Customer changes at the location of an installed Service Account, a new Relevant Period will commence for that Qualified Customer on the start of the next regular billing period following the date the new Qualified Customer takes service under this Schedule, and every subsequent anniversary.
  - ii. If an Owner or Operator terminates service under this Schedule for the Residential Complex prior to the end of any Relevant Period, the Relevant Period for all associated Common Area and Tenant Service Accounts will end on the effective date of the service termination.
  - iii. If a change of Owner or Operator occurs for a Residential Complex prior to the end of any Relevant Period, the Relevant Period for the Owner's or Operator's associated Common Area Service Accounts will end. The new Owner's or Operator's associated Common Area Service Accounts will automatically be placed on this Schedule and a Relevant Period will begin for that new Owner or Operator on the start of the next regular billing period following the date the new Owner or Operator takes service under this Schedule, and every subsequent anniversary thereof. Qualified Customers in individual tenant units will retain their designated Relevant Period as defined prior to the change of ownership.
  - iv. If a Qualified Customer experiences a change from DA or CCA/CA Service to Bundled Service or from Bundled Service to DA or CCA/CA Service, the Relevant Period will consist of that period from the anniversary date until the effective date of the change in service. (L)

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Sheet 11 (T)

(Continued)

SPECIAL CONDITIONS (continued)

1. Definitions. (continued)

k. Relevant Period. (continued)

(L)  
(T)

Qualified Customers may elect to change the start date of their Relevant Period on a one-time prospective basis by completing and returning Form 14-936, *NEM One-Time Relevant Period Change Request Form*, to SCE. SCE must receive this form at least 60 days prior to the requested start date of the new Relevant Period. When the start date change is effectuated, it will cause a shortened existing Relevant Period and the new 12-month Relevant Period will begin. In no case will a Relevant Period extend beyond 12 months.

l. Date of Parallel Operation. The date that SCE provides the Owner or Operator with SCE's written approval (e.g., the Permission to Operate (PTO) notice) to commence parallel operation of the Eligible Generator(s). (T)

m. Net Allocated Surplus Energy. Electricity allocated to a Common Area Service Account or Tenant Service Account in excess of the Service Account's total metered usage over its Relevant Period.<sup>i</sup> (T)  
(N)

n. Otherwise Applicable Tariff (OAT). The Qualified Customer's regularly filed TOU rate schedule under which service is rendered. (T)

2. Upfront Installation Incentives. Pursuant to D.08-10-036 and D.15-01-027, the MASH program provides an upfront rebate for the installation of a qualifying solar energy system, based on an estimate of system performance using the Expected Performance Based Buydown (EPBB) methodology adopted in D.06-08-028. The specific upfront incentives applicable to the installation of a qualifying solar energy system can be found in the MASH Handbook at <http://www.gosolarcalifornia.ca.gov/affordable/mash.php>.

<sup>i</sup> kWh subject to forfeit under the NEM-Paired Storage System estimation methodology provisions of Special Condition 6 below are not used in the determination of Net Allocated Surplus Energy. (N)  
(N)

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MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

SPECIAL CONDITIONS (continued)

3. Required Application and Contracts for Interconnection.

- a. All Owners or Operators must submit an online *Net Energy Metering (NEM) Generating Facility Interconnection Application* (Form 14-957), along with any applicable fees as specified in SCE's Electric Rule 21, and an executed CPUC-jurisdictional *Multifamily Affordable Solar Housing – Virtual Net Metering Interconnection Agreement For Generating Facilities Sized One Megawatt and Smaller* (Form 14-653) or *Multifamily Affordable Solar Housing – Virtual Net Metering Interconnection Agreement For Generating Facilities Sized Greater Than One Megawatt* (Form 14-971) prior to receiving service under this Schedule. The Owner or Operator must also designate which Common Area and/or Tenant Service Accounts shall receive Allocated Credits and the applicable allocation percentage by completing and submitting Form 14-654, *Multifamily Affordable Solar Housing – Virtual Net Metering Allocation Request Form*.
- b. Owners or Operators seeking to interconnect their Eligible Generator(s) for the purpose of receiving service under this Schedule are subject to the interconnection requirements and interconnection cost responsibility provisions for NEM-ST Qualified Customers as established in SCE's Electric Rule 21. These costs may include interconnection application fees, study costs and/or costs for upgrading the Distribution and/or Transmission Systems, depending on the size of the Generating Facility. Owners or Operators are also responsible for the costs of any applicable Interconnection Facilities, as defined in SCE's Electric Rule 21, and applicable re-wiring, trenching, conduit, and other facility costs as needed.

4. Metering Requirements. Metering requirements for Qualified Customers are as follows:

- a. The Owner or Operator will be responsible for and will pay for all costs associated with installing, on each Eligible Generator, a net generation output meter (NGOM) capable of recording generator output in 15-minute intervals and the flow of energy in two directions at the point of common coupling where each Eligible Generator transfers energy to SCE's grid (i.e., the Generating Account). The cost of the NGOM(s) is a one-time, upfront charge that includes material, labor, maintenance and replacement, and may vary from project to project depending on the type of NGOM required to interconnect a particular project. No additional load other than incidental load related to the inverters and support of the Eligible Generator(s) may be registered on the meter. SCE must approve the location of the NGOM equipment, which will normally be grouped with the service and metering equipment for one or more of the tenant or common area meters.
- b. Each Common Area Service Account must have a standard SCE TOU billing meter that is capable of Interval Metering.
- c. Each Tenant Service Account must have a standard SCE TOU billing meter that is capable of Interval Metering.
- d. If the Generating Account is on DA service and the Owner or Operator uses a third-party Meter Data Management Agent (MDMA), the Owner or Operator will be responsible for any and all costs associated with providing SCE acceptable interval data into the SCE system on a timely basis.
- e. Additional metering provisions specific to NEM-Paired Storage Systems are included in (N) Special Condition 6 below. (N)

(Continued)

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MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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Sheet 13 (T)

(Continued)

SPECIAL CONDITIONS (continued)

5. Billing Process. The following billing processes apply to Qualified Customers served under this Schedule.
- a. Gross Credit. The total metered kWh output of all Eligible Generators, delivered to SCE's grid, as metered at the point of common coupling described in Special Condition 4.a above.
  - b. Allocated Credit.
    - i. The Owner or Operator must designate the percentage of the Gross Credit that will be allocated to Common Area Service Accounts and/or Tenant Service Accounts on the *MASH-VNM Allocation Request Form* (Form 14-654). This allocation will become effective on the start of the next regular billing period following the Date of Parallel Operation of the Eligible Generators with the electric grid, and will remain in effect for a minimum of five years. For Qualified Customers electing to receive service under this Schedule for an Eligible Generator that is already interconnected to SCE's electric system, the allocation will become effective on the date the Qualified Customer begins receiving service under this Schedule, and will remain in effect for a minimum of five years.
    - ii. The Owner or Operator must determine the percentage of Allocated Credit of the Eligible Generator(s) that will be further allocated to the individual TOU Tenant Service Account(s) based on the relative size of the residential unit(s), generally consistent with the manner in which affordable housing rents are established. These allocations will remain in effect unless: (1) a unit becomes uninhabitable or is no longer served on a TOU rate; (2) a unit that was previously removed or excluded from the allocation becomes habitable and is served on a TOU rate; (3) a new residential unit of the Residential Complex served on a TOU rate becomes available. At such time, the Owner or Operator may submit an updated *MASH-VNM Allocation Request Form*, which will remain in effect for a minimum of twelve months. An updated allocation under this provision will become effective on the start of the next regular billing period that is at least 30 days after SCE receives the updated allocation request form.
    - iii. The Owner or Operator must determine the percentage of Allocated Credit of the Eligible Generator(s) that will be further allocated to individual TOU Common Area Service Accounts. These allocations will remain in effect until: (1) service to the Common Area Service Account(s) is permanently terminated; or (2) a new Common Area Service Account at the Residential Complex is established and receives service on a TOU rate. At such time, the Owner or Operator may submit an updated *MASH-VNM Allocation Request Form*, which will remain in effect for a minimum of twelve months. An updated allocation under this provision will become effective on the start of the next regular billing period that is at least 30 days after SCE receives the updated allocation request form.

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MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
SUCCESSOR TARIFF

Sheet 14 (T)

(Continued)

SPECIAL CONDITIONS (continued)

5. Billing Process. (continued)

b. Allocated Credit. (continued)

iv. The total allocation of kWh to Common Area Service Account(s) is calculated by multiplying the common area percentage allocation by the Gross Credit. The individual allocation of kWh to each Common Area Service Account is calculated by multiplying this total common area allocation by the percentage allocation for each individual Common Area Service Account. The total allocation of kWh to Tenant Service Accounts is calculated by multiplying the tenant percentage allocation by the Gross Credit. The individual allocation of kWh to each Tenant Service Account is calculated by multiplying this total tenant allocation by the percentage allocation for each individual Tenant Service Account.

v. Allocated Credits for Qualified Customers utilizing NEM-Paired Storage Systems are billed in accordance with the provisions of Special Condition 6 below. (N)  
(N)

c. Qualified Customer Bill. SCE will provide each Qualified Customer with its net energy information with each regular bill. That information will include the monetary balance of energy charges and credits since the start of the current Relevant Period. Qualified Customers are responsible for all charges of their OAT. Each month, Allocated Credits, in kWh, are subtracted from the Qualified Customer's metered usage, in kWh. Certain Energy Charges, as provided in the Rates section above, are applied to the resulting kWh difference according to the rates of the Qualified Customer's OAT. The bill may therefore reflect either a charge or a credit for energy (kWh). Allocated Credits for each TOU period are subtracted from the energy usage for that same TOU period. Additionally, SCE will provide all Qualified Customers with the total amount of kWh imported from the grid (Es), on which the Qualified Customer's NBCs are calculated, as outlined in the Rates section above.

d. Bill Payment and True-Up. Qualified Customers are required to pay their bills on a monthly basis. Bill payments made by the Qualified Customer within the Relevant Period will continue to be applied to the Qualified Customer's account. Excess energy credits, in dollars, are carried over to the following billing period, until the end of the Relevant Period. An annual true-up of energy charges and credits occurs at the end of the Relevant Period. Upon completion of the annual true-up, any remaining energy credits will be retained by SCE and the Qualified Customer will not be entitled to any compensation unless the Owner or Operator has opted to participate in the NSC program, as provided in Special Condition 5.g below. Additionally, Special Condition 5.h may apply to Residential Customers.

e. For all Qualified Customers served under this Schedule, all NBCs, as defined in the Rates section above, Monthly Customer Charges, Minimum Charges, Demand Charges, and/or other non-energy related charges, excluding any adjustments due to power factor provisions, as defined in the Qualified Customer's OAT, apply, as applicable, regardless of the amount of Allocated Credit applied to the Qualified Customer's Common Area and/or Tenant Service Account.

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Sheet 15 (T)

(Continued)

SPECIAL CONDITIONS (continued)

5. Billing Process. (continued)

f. Billing Provisions Applicable to DA, CCA or CA Service Qualified Customers.

- i. For DA, CCA or CA Service Qualified Customers, SCE will provide the applicable Delivery Service and CRS charges and credits, and the Customer's ESP, Community Choice Aggregator or Community Aggregator is responsible for timely providing the applicable generation charges and credits. Generation credits, if any, do not reduce the charges owed to SCE for energy supplied to such Qualified Customer, and Delivery Service and/or CRS credits, if any, do not reduce the charges owed to the ESP, Community Choice Aggregator or Community Aggregator for energy supplied to such Qualified Customer.
- ii. For DA, CCA or CA Service Qualified Customers, separate annual true-ups of all charges and credits, consistent with the provisions set forth in this Schedule, will be calculated (A) by SCE for the applicable SCE charges and credits and (B) by the ESP or Community Choice Aggregator/Community Aggregator for the applicable ESP or CCA/CA charges and credits. Upon completion of the annual true-up, any remaining Delivery Service and/or CRS credits will be retained by SCE and the Qualified Customer will not be entitled to any compensation from SCE. DA, CCA or CA Service Qualified Customers are not eligible to receive NSC from SCE.
- iii. ESP Charges: Where SCE provides metering and billing for a Qualified DA Customer, SCE may recover the incremental costs related to virtual net energy metering and billing services from the Qualified Customer's ESP, as set forth in Schedule ESP-DSF.

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MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

SPECIAL CONDITIONS (continued)

5. Billing Process. (continued)

g. NSC Billing Provisions.

- i. For Qualified Customers' Common Area and/or Tenant Service Accounts to be eligible to receive NSC, the Owner or Operator must affirmatively elect to have the Common Area and/or Tenant Service Accounts receive NSC and submit any necessary documentation prior to SCE processing the final bill of the Relevant Period. If the Owner or Operator elects such compensation, the eligible Common Area and/or Tenant Service Accounts with Net Allocated Surplus Energy will receive NSC. The Common Area and/or Tenant Service Accounts will continue to receive NSC, as applicable, for each Relevant Period following the execution of such election, unless the Owner or Operator affirmatively elects to end participation in the NSC program. The Owner or Operator is eligible to revise the NSC elections annually. NSC is applied to a Qualified Customer's future charges (i.e., SCE Service Account) as an on-bill credit, unless the Qualified Customer elects to receive payment via check (Qualified Customers may only modify this election once a year, and must do so prior to the conclusion of the existing Relevant Period for the new election to occur in that Relevant Period). For Qualified Customers electing to receive NSC via check, the amount of the check will be reduced by any amount that the Qualified Customer owes to SCE before a check is issued to the Qualified Customer. After the on-bill credit or check is issued to the Qualified Customer, Net Allocated Surplus Energy is set to zero at the start of the next Relevant Period.
- ii. In order for Qualified Customers to be eligible to receive NSC from SCE, Owners or Operators with Eligible Generators sized larger than 1 MW must provide notice to SCE that the Owner or Operator self-certified its Eligible Generator as a Qualifying Facility pursuant to the Public Utility Regulatory Policies Act of 1978 by properly completing and filing Federal Energy Regulatory Commission (FERC) Form No. 556 with the FERC and providing SCE with a copy of the certification.
- iii. DA, CCA or CA Service Customers are not eligible to receive NSC from SCE.
- iv. In order for Qualified Customers to receive the NSC RAA, Form 14-935 must be executed and submitted to SCE at the end of each Relevant Period.
- h. California Climate Credit Cash-Out Provision for Residential Qualified Customers. Qualified Customers receiving service on a Residential rate schedule receive a semi-annual California Climate Credit from the State of California. In the event that a portion or all of the dollar value of the California Climate Credit cannot be consumed by the end of the Qualified Customer's Relevant Period, one of the following will occur: (A) for Residential Qualified Customers with Net Allocated Surplus Energy electing to receive NSC via a separate check – any remaining California Climate Credit balance will be added to the NSC owed the Customer and sent with the NSC check, or (B) for all other Residential Qualified Customers – any remaining California Climate Credit balance will be sent to the Qualified Customer via a separate check after the final billing statement for the current Relevant Period is issued.

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MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

SPECIAL CONDITIONS (continued)

6. NEM-Paired Storage Systems. (T)

Pursuant to D.16-04-020, D.16-01-044 and D.14-05-033, where an Owner or Operator utilizes a NEM-Paired Storage System (as defined in Special Condition 1.h), the applicable provisions of this Special Condition 6 shall apply. Additionally, where this Special Condition conflicts with any other Special Condition within this Schedule, the provisions contained in this Special Condition shall prevail. Qualified Customers with NEM-Paired Storage Systems who take service under this Special Condition are exempt from Supplemental Review fees, Detailed Study costs, and the costs associated with any Distribution or Network upgrades triggered by the Interconnection Request, provided the solar PV is sized 1 MW or smaller.<sup>i</sup> Qualified Customers with NEM-Paired Storage Systems who take service under this Special Condition are exempt from Standby charges. (N)

a. Sizing Requirements. The size of the Integrated or Directly Connected Energy Storage Device is determined by the inverter alternating current (AC) nameplate rating.

i. Small NEM-Paired Storage System: There are no additional sizing requirements for the Integrated or Directly Connected Energy Storage Device relative to the size of the solar PV.

ii. Large NEM-Paired Storage System: The maximum aggregate output capacity of the Integrated or Directly Connected Energy Storage Device(s) can be no greater than 150 percent of the solar PV's maximum output capacity. For example, if the maximum output capacity of the solar PV is 15 kW, the maximum aggregate output capacity of the Integrated or Directly Connected Energy Storage Device(s) can be no greater than 30 kW.

b. Metering Requirements.

i. Small NEM-Paired Storage Systems. An estimation methodology, as described in Section 6.c below, shall apply in lieu of additional metering. As an alternative option, at the start of a new Relevant Period, Qualified Customers may elect to adhere to the metering and billing requirements applicable to Large NEM-Paired Storage Systems. Qualified Customers who elect this option shall not be subject to the estimation methodology so long as the necessary metering requirements are in place. The cost of the metering required under this option shall not exceed \$600, unless Complex Metering, as described below, is required. For Small NEM-Paired Storage Systems that are unable to meet the metering requirements of Large NEM-Paired Storage Systems, the estimation methodology shall apply.

ii. Large NEM-Paired Storage Systems. Qualified Customers must adhere to the metering and billing requirements contained within Special Condition 7.b of Schedule NEM-ST. For metering and billing purposes only, the Integrated or Directly Connected Energy Storage Device is treated as the Non-NEM Eligible Generator when applying the provisions of Special Condition 7.b of Schedule NEM-ST. The cost of the metering required under this provision shall not exceed \$600, unless Complex Metering, as described below, is required. Eligible Generators that are unable to meet the metering requirements of Special Condition 7.b of Schedule NEM-ST are ineligible for service under this Schedule as a NEM-Paired Storage System. (N)(L)

<sup>i</sup> In the event the Integrated or Directly Connected Energy Storage Device is added subsequent to the date that the solar PV received Permission to Operate, the same interconnection cost categories applicable to the solar PV shall apply to the Integrated or Directly Connected Energy Storage Device. (N)

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SUCCESSOR TARIFF

Sheet 18 (N)

(Continued)

SPECIAL CONDITIONS (continued)

6. NEM-Paired Storage Systems. (Continued)

b. Metering Requirements. (Continued)

iii. Complex Metering. A NEM-Paired Storage System that utilizes more than two self-contained meters in addition to the SCE revenue meter(s) or any non-self-contained meters (i.e., those that include CTs/PTs) (not including the SCE revenue meter(s)) is considered as having Complex Metering for the purposes of this Special Condition.

c. Estimation Methodology for Small NEM-Paired Storage Systems. Once implemented in SCE's billing system, Qualified Customers subject to this provision shall have a monthly maximum Allocated Credit cap established for each calendar month using the California Solar Initiative EPBB calculator. In all cases, the first day of the Qualified Customer's Billing Period determines which calendar month cap is used for that Billing Period. For example, if the Qualified Customer's Billing Period starts on January 15 and ends on February 15, the January cap is used. Any Allocated Credits ( $E_F$ ) that exceed the monthly cap are not eligible for NEM credit and are forfeited by the Qualified Customer. For example, if a Qualified Customer's monthly cap amount for January is 500 kWh and the Qualified Customer is allocated 525 kWh for that monthly Billing Period, 25 kWh are not eligible for NEM credit and are forfeited. The forfeited kWh are assumed to have occurred during the Qualified Customer's highest priced TOU period, regardless of when the energy was actually exported. If the amount of forfeited kWh for a Billing Period exceeds the amount of Allocated Credits for the Qualified Customer's highest priced TOU period, the remaining kWh subject to forfeit are then removed from the next highest priced TOU period and so on until all kWh subject to forfeit are accounted for. For example, if a Qualified Customer has a July monthly cap amount of 700 kWh and is allocated 1,000 kWh, 300 kWh must be forfeited. If the Qualified Customer was allocated 200 kWh in the Summer On-peak period and 800 kWh in the Summer Mid-Peak period, 200 kWh of the forfeited 300 kWh are removed from the Summer On-Peak period (so the Qualified Customer's Allocated Credit during the Summer On-Peak period is billed at zero); the remaining 100 kWh of the forfeited 300 kWh are removed from the Summer Mid-Peak period (so the Qualified Customer's Allocated Credit during the Summer Mid-Peak period is billed at 700 kWh). Forfeited kWh are not eligible for NSC.

d. Interconnection and Safety Requirements. NEM-Paired Storage Systems must meet the technical and safety standards required for interconnection under Rule 21. This includes evaluation under the same technical interconnection standards currently applied to Generating Facilities that are not paired with energy storage devices.

e. NEM Transition Provisions. NEM-Paired Storage Systems are subject to the transition provisions included in Special Condition 9 below. In regards to Special Condition 9.b, NEM-Paired Storage Systems shall remain eligible for service under this Schedule provided the capacity of the Integrated or Directly Connected Energy Storage Device(s) is not increased by more than 10 percent of its original maximum aggregate output capacity.

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(Continued)

SPECIAL CONDITIONS (continued)

- 7. Insurance. The Owner or Operator must keep in force the amount of property, common general liability and/or personal liability insurance that was in place at the time the Owner or Operator initiated service under this Schedule. (L)
- 8. Release of Information. The Owner or Operator agrees that SCE may from time to time release to the CEC and/or the Commission information regarding the eligible Multifamily Affordable Solar Housing Residential Complex, including the Owner/Operator's name, each Eligible Generator's location, their capacity and operating characteristics, and Qualified Customer names and account numbers at the Residential Complex. (L)

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MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
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(Continued)

SPECIAL CONDITIONS (continued)

9. MASH-VNM-ST 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. 20-Year Transition Period.

Pursuant to D.16-01-044, Qualified Customers who are receiving service on this Schedule, or for whom the Owner or Operator has submitted all documentation necessary to receive service on this Schedule, are eligible to continue receiving service on this Schedule for a period of 20 years from the original year in which their Eligible Generator was interconnected to SCE's grid, indicated by and measured from the date on which the Owner or Operator originally received permission to operate (PTO) the Eligible Generator from SCE and ending at the conclusion of the Qualified Customer's applicable Relevant Period that ends immediately on or after the 20th anniversary of the original PTO date. For example, if an Owner or Operator initially received PTO on April 1, 2018, Qualified Customers are eligible to continue receiving service on this Schedule through the conclusion of the Relevant Period ending immediately on or after March 31, 2038. Qualified Customers taking service on Schedule MASH-VNM who elect to make a one-time switch to this Schedule prior to the conclusion of their Schedule MASH-VNM 20-year transition period can continue service under this Schedule from the date of the Eligible Generator's original Schedule MASH-VNM PTO date; these Qualified Customers may not restart their 20-year transition period by transitioning early to this Schedule. Qualified Customers electing to switch to this Schedule prior to the conclusion of their Schedule MASH-VNM 20-year transition period permanently forfeit any of their remaining transition period eligibility on Schedule MASH-VNM and may not later change back to receiving service under Schedule MASH-VNM.

b. Modifications.

Qualified Customers with Eligible Generators eligible for the 20-year transition period outlined above that are modified and/or repaired shall remain eligible for the remainder of their 20-year transition period as long as the modifications and/or repairs do not increase the Eligible Generator by more than the greater of (1) 10 percent of the Eligible Generator's nameplate rating capacity, as established when the Eligible Generator was originally interconnected, or (2) 1 kW; and provided the modifications and/or repairs do not result in the Eligible Generator exceeding the generation limitations as provided in Special Conditions 1.g.iii.A and 1.g.iii.B above. Owners or Operators making modifications and/or additions to their Eligible Generators 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 Eligible Generator served under another eligible tariff, subject to the terms and conditions established therein.

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MULTIFAMILY AFFORDABLE SOLAR HOUSING VIRTUAL NET METERING  
SUCCESSOR TARIFF  
 (Continued)

SPECIAL CONDITIONS (continued)

9. MASH-VNM-ST Grandfathering Provisions. (continued)

c. Transferability.

Eligible Generators eligible for the 20-year transition period shall not lose their eligibility if transferred to a new Owner, Operator, or SCE account, provided the Eligible Generator remains at its original location. The transfer of an existing Eligible Generator 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.

d. Integrated or Directly Connected Energy Storage Devices. (T)

Integrated or Directly Connected Energy Storage Devices shall be treated in the same way, (T)  
 and be subject to the same grandfathering provisions, as the Eligible Generators to which (T)  
 they are connected.

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