



Value of Distributed Energy Resources ("VDER" or "Value Stack") Community Distributed Generation

Procedural Requirements

18 Link Drive
P.O. Box 5224
Binghamton, NY 13902

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Level of confidentiality: **Public**

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CDG VDER Procedural Requirements

1. INTRODUCTION

On July 17, 2015, the State of New York Public Service Commission (“PSC” or “Commission”) issued the Order Establishing a Community Distributed Generation Program and Making Other Findings (the “Order”), in Case 15-E-0082¹ under which the policies, requirements and conditions for implementing Community Net Metering were established. (Community Net Metering is referred to as Community Distributed Generation (“CDG”) in all communications.)

Subsequently, on March 9, 2017, the Commission issued its Order on Net Energy Metering Transition, Phase One of Value of Distributed Energy Resources, and Related Matters in Case 15-E-0751 (“Value of Distributed Energy Resource Order” or “VDER Order”) in which the policies, requirements, and conditions for Community Distributed Generation (“CDG”) were updated to reflect a transition away from net metering.

On October 19, 2017, the Commission issued its Order Establishing Oversight Framework and Uniform Business Practices for Distributed Energy Resource Suppliers in Case 15-M-0180 which establishes Uniform Business Practices (“UBP- DERS”) for oversight of distributed energy resources suppliers (“DERS” or “DER suppliers”) and a more specific and detailed set of provisions for CDG providers.

On September 12, 2018, the Commission issued its Order on Value Stack Eligibility Expansion and Other Matters (“Expansion Order”), which enabled more generator technology types to be CDG Hosts.

On December 12, 2019, the Commission issued its Order Regarding Consolidated Billing for Community Distributed Generation in Case 19-M-0463 (“Net Crediting Order”) which established the policies, requirements, and conditions to implement Net Crediting. The terms of service for CDG that resulted from the VDER Order, the Expansion Order, and the Net Crediting Order are set forth in the following NYSEG and RG&E tariffs: (1) NYSEG - Schedule for Electricity, NYSEG Tariff P.S.C. No. 119, NYSEG Tariff P.S.C. No. 120, and NYSEG Tariff P.S.C. No. 121; and (2) RG&E P.S.C. No. 18 and RG&E Tariff P.S.C. No. 19 (“Tariffs”).

¹ Case 15-E-0082 – Proceeding on Motion of the Commission as to the Policies, Requirements and Conditions for Implementing a Company Net Metering Program

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CDG VDER Procedural Requirements

Under the CDG Program, there are three main parties: the CDG Host; CDG Satellites; and NYSEG or RG&E (herein after referred to individually as the “Company” or jointly as the “Companies”.. A CDG Host is the project sponsor and is responsible for owning or operating the generation facility, coordinating the project’s interconnection and operation with the Company, and supervising and fostering cooperation among the project’s satellites. CDG Satellites are electric customers of the Company who will own or contract with the CDG Host for a proportion of the credits accumulated at the generation facility’s meter, as a percentage of monetary VDER compensation for the facility’s output in excess of usage on the CDG Host’s account. The Companies will be responsible for distributing the credits from the CDG Host’s account in accordance with the CDG Host’s instructions.

This procedural document (“Procedure”) will set forth definitions, responsibilities, and establish the processes necessary for CDG projects to be eligible for Value Stack Compensation, and Net Crediting if chosen. Sections two through six lay out responsibilities, procedures, and guidelines for CDG Hosts with Value Stack Compensation. Additional responsibilities, procedures, and guidelines for projects electing to participate in Net Crediting are presented in the Net Credit Manual, section seven.

This Procedure may change from time to time based on experience, system enhancements, or subsequent PSC orders, including adoption or modification of the Uniform Business Practices². In the event of any inconsistency between the rate schedule(s) or any PSC order of the above-mentioned requirements and this plan, the rate schedule(s) and PSC orders will govern. In the event of conflict between this Procedure, the CDG Net Crediting Agreement, and the Tariffs, such conflict will be resolved in the following order of preference: (a) the Tariffs; (b) the Net Crediting Agreement; and (c) this Procedure.

2. DEFINITIONS

Allocated Credit is the amount of the CDG Host value stack credit allocated to each CDG Satellite based on the allocation percentage provided by the CDG Host.

Applied Credit is equal to the portion of the Allocated Credit, plus any Banked Satellite Monetary Banked Credit, plus any Host Bank allocation, if applicable, that offsets the CDG Satellite’s electric service bill from the Company each billing period. A CDG Satellite’s applied credit cannot

² Case 15-M-0180 – Order Establishing Oversight Framework and Uniform Business Practices for Distributed Energy Resource Suppliers



exceed the amount of a CDG Satellite's electric service bill from the Company during an individual billing period.

CDG Host: A non-residential Company customer that owns or operates electric generating equipment eligible for Value Stack Compensation for net energy produced by its generating equipment in accordance with NYSEG P.S.C. No. 120 and RG&E P.S.C. No. 19 whose compensation is applied to the accounts of other electric customers ("CDG Satellites") with which it has a contractual arrangement related to the disposition of Value Stack credits.

CDG Host Anniversary Month: 11 months from the CDG Host's initial CDG bill period start date. The CDG Host Anniversary month cannot be modified or changed.

CDG Host Banked Monetary Credit: Credits that are remaining on the CDG Host's account. Market Transition credits cannot be banked on the Host account. The Banked Monetary Credits shall be carried forward on the CDG Host Account, less the Market Transition Credit, to the succeeding bill period until the earlier of:

- a. CDG Host notifies the Company of the subscribers to receive the Banked Monetary Credits and the amount of credits to be allocated to the subscriber; or
- b. The two-year grace period has expired.

CDG Satellite: An electric Company customer who is participating in a CDG Program. Each customer shall own or contract for a proportion of the Value Stack Credits accumulated at the meter of the CDG Host.

CDG Satellite Banked Monetary Credit: If a monetary credit remains on any CDG Satellite Account, the remaining credit will be carried forward on that CDG Satellite Account to the succeeding billing period.

Excess Generation: The electricity net export net hourly injections supplied by the CDG Host to the Company during the billing period.

Value Stack Credits: the credits generated for compensation of Excess Generation from the CDG Project pursuant to the Value of Distributed Energy Resources ("VDER") section of NYSEG P.S.C. No. 120 or RG&E P.S.C No. 19.



3. CDG HOST ELIGIBILITY PROVISIONS

- a. Participating CDG Hosts must be registered with the Commission in accordance with the UBP-DERs and conform to the requirements of all relevant Commission orders.
- b. The CDG Host is a non-residential customer who owns or operates electric generating equipment eligible for VDER compensation as described in NYSEG Tariff P.S.C. No. 120 40.B.1 and RG&E Tariff P.S.C. No. 19 26.B.1. for the net energy produced by its generating equipment, applied to accounts of other electric customers (“CDG Satellites”) with which it has a contractual arrangement related to the disposition of Value Stack Credits.
- c. The CDG Host has a contract in writing with each of their satellite customers for a portion of Value Stack compensation for the Excess Generation at the meter of the CDG Host and ensures all CDG Satellites meet participation requirements.
- d. The Company shall not be responsible for any contractual arrangements or other agreements between the CDG Host and CDG Satellites including contractual terms, pricing, dispute resolution and contract term.
- e. Parties must meet all terms and conditions of this Procedure, which may be amended or superseded from time to time.
- f. Parties must meet the requirements of the PSC that are adopted pursuant to its Orders, issued in Case 15-E-0082³, Case 15-M-0180⁴, Case 15-E-0751⁵, and if applicable, Case 19-M-0463⁶.
- g. The CDG Host is certifying in writing to the Company, both prior to commencing service under CDG and annually thereafter, that it has met all requirements established and is in compliance with all applicable laws and the Confidentiality Agreement or Data Security Agreement. CDG Hosts with an electronic connection to the Company other than by email will be required to execute a Data Security Agreement with the Company.

³ Case 15-E-0082 – Proceeding on Motion of the Commission as to the Policies, Requirements and Conditions for Implementing a Company Net Metering Program

⁴ Case 15-M-0180 - In the Matter of Regulation and Oversight of Distributed Energy Resource Providers and Products

⁵ Case 15-E-0751 - Net Energy Metering Transition, Phase One of Value of Distributed Energy Resources, and Related Matters)

⁶ Case 19-M-0463 - In the Matter of Consolidated Billing for Distributed Energy Resources



4. CDG HOST PROGRAM PROVISIONS

The CDG Host shall:

- a. Comply with all requirements of the Public Service Commission and with the Companies' electricity rate schedule, NYSEG P.S.C. No. 119, NYSEG P.S.C. No. 120, and NYSEG P.S.C. No. 121 and RG&E P.S.C. No. 18 and RG&E P.S.C. No. 19 which may be amended from time to time.
- b. Operate in compliance with the standards and requirements set forth in the New York State Standardized Interconnection Requirements ("SIR").
- c. Provide consistent and fair treatment to customers.
- d. Maintain processes and procedures to resolve customer inquiries and complaints related to the CDG project without undue discrimination in an efficient manner and provide an acknowledgement or a response to a customer inquiry within 2 days and if only an acknowledgement is provided, a response within 14 days.
- e. Direct the customer to contact NYSEG at 1.800.572.1111 or RG&E at 1.800.743.2110 if an inquiry is specific to Company service or billing.
- f. Maintain information regarding customer inquiries and complaints pertaining to its products and services and designate a representative to provide information relating to customer inquiries and complaints to the Department of Public Service (alternatively referred to as "DPS", "Department" or "Staff").
- g. Seek to resolve disputes among CDG Satellites in the first instance. If the dispute cannot be resolved, the Satellites can contact DPS to pursue the dispute resolution process available at the Department of the Public Service Commission to resolve disputes between CDG Host and Satellites.
- h. Obtain written authorization from the customer to request and receive the customer's historical consumption prior to providing the customer's name and account number to the Company in accordance with the Data Exchange Protocols outlined in Appendix C, or other available Company methods such as Electronic Data Interchange or Secured Service Site.
- i. Certify that it has written authorization from the customer to request and receive the customer's historical usage information upon request of the information from the Company.



- j. Certify it has entered into a written contract with a customer upon submitting CDG Allocation Requests on behalf of such customer.
- k. Be a non-residential customer with a Generation Facility as described in NYSEG Tariff P.S.C. No. 120 40.B.1 and RG&E Tariff P.S.C. No. 19 26.B.1.
- l. Certify in writing to the Company, both prior to commencing VDER service under CDG and annually thereafter, that it has met all established requirements and is in compliance with all applicable laws and CDG program requirements.
- m. Certify they can satisfy the obligations assumed with respect to their CDG Satellites.
- n. Be and remain in good standing in the Company's CDG program and all other Company programs, as applicable, and the CDG Host shall not be in default under any agreement by and between CDG Host and Company.
- o. Never request termination or suspension of the Company's electric service to a CDG Satellite Account.
- p. Provide advance notice to the Company for changes to previously provided documentation, such as ownership transfers, or a change in agents or contacts, etc.

5. CDG PROCESS RESPONSIBILITIES

The Parties shall be responsible for complying with all the following processes and associated customer care activities:

Distributed Generation Application

- a. Complete and submit the Standard Interconnection Requirements document to the Company via distributedgenerationadmin@avangrid.com.
- b. After submitting an application for Distributed Generation, the applicant will receive a project file number.
- c. After receiving approval from the Company and meeting all requirements related to the interconnection of the facility, the applicant shall be notified of their effective interconnection date via a final installation letter.



CDG Host Required Documents

Complete and submit the following documents to the Companies via NYSEG_CDG@nyseg.com or RGE_CDG@rge.com:

- a. CDG Value Stack Host Information Form (Appendix A)
- b. CDG Value Stack Host Certification (Appendix B)
- c. CDG Value Stack Data Exchange Contact Form (Appendix C)
- d. Agent Authorization Form (Appendix D) as applicable.

Once the required documents have been submitted, the CDG Host will receive an email that includes the Data Security Agreement (see section 6). After the CDG Host reviews the Data Security Agreement, it should be signed and emailed to NYSEG_CDG@nyseg.com or RGE_CDG@rge.com.

If the CDG Host wishes to enroll the project in the Net Crediting Program, additional required documents must be submitted as discussed in Section 7.B below.

Data Exchange processes

After all complete CDG Host Required Documents are received, the Company will send the following to the CDG Host via separate emails:

- a. CDG Host ID, to be used in the file nomenclature
- b. Initial/Subsequent/Banked Allocation Request spreadsheets
- c. Access instructions for setting up Avangrid SFTP Site

The above information will be emailed to the email addresses provided in the CDG Value Stack Data Exchange Contact Form (Appendix C) within 10 business days, or another timeframe that is mutually agreeable.

The CDG Host shall submit allocation requests to the Companies via the Avangrid SFTP Site in a text, tab delimited, file. Requests must be submitted using the proper file naming convention and format to be processed by NYSEG or RG&E. Sample allocations and required file naming conventions for Initial Allocation, Subsequent Allocation, and Banked Allocation Requests can be found in Appendix C, Data Exchange Protocols.

Typically, within two business days, the Company will validate a request and respond with an acceptance or denial by adding a validated response in a text file to the SFTP site. When applicable, error messages with the specific reason(s) for failure will be included in the spreadsheet. Additional information regarding request validation and Avangrid's SFTP Site can be found in Appendix C.

All CDG Host inquiries related to the administration and/or billing of the CDG program shall be directed to NYSEG_CDG@nyseg.com or RGE_CDG@rge.com.



The Data Exchange processes are defined below:

- A. Historical Consumption Request
- B. Initial Allocation Request
- C. Subsequent Allocation Request
- D. Banked Allocation Request
- E. Satellite Account Closure and Notification

A. Historical Consumption Request

- i. Historical Consumption Requests can be made through the Secured Services portal available on NYSEG.com or RGE.com, or through Electronic Data Interchange (EDI).
- ii. Data will be returned for all valid account numbers requested and include up to 12 months of usage when available.
- iii. To request access to NYSEG and/or RG&E's Secured Service portal, email NYSEG_CDG@nyseg.com or RGE_CDG@rge.com, as applicable. For additional information regarding EDI historical consumption requests, email Supplier_Relations@rge.com.

B. Initial Allocation Request

- i. Initial Allocation Requests must be received at least 60 days before starting billing under CDG. The host shall designate the Host Account, Host ID, and the CDG Satellite Accounts in the initial Allocation Request.
 - a. Accepted Allocation Requests will be effective with the first full Host Account billing period from the later of 30 days after acceptance or effective date of interconnection.
 - b. The CDG Host has the option to request that if a CDG Satellite is rejected, the CDG Satellite be removed, and the percentage originally allocated to that CDG Satellite be added to the CDG Host's allocation percentage. The CDG Host must select "Y" in the specified cell on the allocation file consenting to the automatic removal of the CDG Satellite. The file will then be marked Accepted.
- ii. The CDG Host will communicate to the Company any electric metered CDG Satellite Accounts with which it has a contractual agreement related to the disposition of Value Stack Credits via email. Satellite allocations of Host Account VDER compensation for Excess Generation should be specified in a percentage up to three decimal places of accuracy.
- iii. Satellite allocations must total 100% or less. For Satellite allocations less than 100%, the CDG Host must designate the remaining percentage to their CDG Host account.



- iv. The CDG Host must designate at least ten CDG Satellites accounts with active NYSEG or RG&E electric service under NYSEG P.S.C. No. 120 and P.S.C. No. 121 or RG&E P.S.C. No. 18 and P.S.C. No. 19 except when the project:
 - a. is located on the site of a property serving multiple residential or non-residential customers.
 - b. only serves farm operations (“CDG Farm Project”), as defined in PSL Agricultural and Markets Law, Section 301(11); and residences of individuals who own or are employed by the served farm operations. A CDG Farm Project that seeks to waive the minimum number of Satellite Accounts shall be responsible for certifying to the Company that each Satellite Account is either a farm operation or the owner or employee of one of the farm operation Satellite Accounts
- v. No more than 40% of the Excess Generation of the CDG Host may serve CDG Satellites that have an average of 25 kW or greater in the past twelve months (for those members collectively); provided, however, that the CDG Host may include each dwelling unit located within a multi-unit building and served indirectly as though it were a separate participant for determining whether the ten CDG Satellite minimum and 40% output limits are reached.
- vi. The CDG Host may not request an allocation for an account that is a net metered customer-generator a Remote Net Metered Host or Satellite, Remote Credit Host or Satellite or taking Standby Service under NYSEG P.S.C. No. 120, Service Classification 11 or RG&E P.S.C. No. 19, Service Classification 14.
- vii. The CDG Host account and all associated CDG Satellites can be located in different NYISO (New York Independent System Operator) zones located within the Company’s service territory.
- viii. Each Satellite allocation distribution percentage must amount to at least 1,000 kWh annually but may not exceed the CDG Satellite Account’s historic average annual kWh usage (or forecast usage if historic data is not available).
- ix. The Company will validate the request and respond with the appropriate error message as outlined in Appendix C.
- x. If a request does not pass validation, the entire request will be rejected, unless “Y” is selected as described in Section 5 B.i.b of this document. The CDG Host must submit a new Allocation Request to the Company. An updated request must be received at least 31 days prior to the next full CDG Host bill to be validated and accepted 30 days prior to the next CDG Host bill.



- xi. If a valid initial request is not accepted by the Company 30 days prior to the CDG Host's first utility bill after interconnection is completed, the entire value stack allocation is banked on the CDG Host account. A Banked Allocation Request must be used to distribute the allocations banked on the CDG Host.

C. Subsequent Allocation Request

- i. After commencing service under the CDG Program, the CDG Host may modify its CDG Satellite Accounts and/or the percentage allocated to itself or one or more of its CDG Satellite Accounts once per CDG Host billing cycle by giving notice to the Company no less than 31 days before the CDG Host Account's cycle billing date to which the modifications apply.
- ii. The information contained in the Subsequent Allocation Request will follow the same request format, validation, and submittal process as outlined in the Initial Allocations Requests section above and as noted in Appendix C, except as noted in subparagraphs below.
 - a. CDG Host must include all CDG Satellites allocations when submitting a revised distribution percentage for any of their Satellite customers.
 - b. Accepted Allocation requests will be effective with the first full CDG Host bill period 30 days after acceptance.
 - c. Only one valid Allocation Request will be accepted in a calendar month. If the request is rejected, an updated request must be received at least 31 days prior to the next full CDG Host bill to be validated and accepted 30 days prior to the next CDG Host bill.

D. Banked Allocation Requests

The CDG Host may choose to submit a Host Banked Allocation Request to fully distribute 100% or a partial amount of the Host Account's Banked Monetary Credits to its members.

CDG Host Account shall have up to a two-year grace period following the CDG Host's Anniversary month to distribute excess credits they retain at the end of the annual period. If the CDG Host Account has any annual credits remaining at the end of the two-year grace period, it shall forfeit the number of credits equal to the smallest number of credits that were in the CDG Host's account at any point during the grace period.



- i. The CDG Host may furnish to the Companies a Banked Allocation request at any time. A Banked allocation is effective for a one-time allocation only.
- ii. The most recent Allocation Request in effect prior to the Banked Allocation Request will continue to be applied to all on-going allocations unless a new Subsequent Allocation request is submitted.

E. Satellite Account Closure

- i. The Company may close a customer's account for multiple reasons including but not limited to (a) bankruptcy, (b) shut off for non-payment, or (c) customer request.
- ii. A CDG Satellite Account shall no longer receive credits after the final bill is rendered on its account. Any remaining credits after application to the Satellite Account's will be transferred back to the CDG Host Account, as described in the Companies' Tariffs.
- iii. Satellite Account closures will be communicated via the Applied Credit Report.

F. Host Account Closure and Transfer of Ownership

- i. A CDG Host shall notify the Company of any change in ownership of the CDG project or ownership structure, including party responsible for the CDG Host utility bill, in writing via NYSEG_CDG@nyseg.com or RGE_CDG@rge.com, at least sixty days prior to the effective date of the change.
- ii. Per Company Tariffs, any remaining banked credits after a CDG Host's final bill is rendered shall not be transferred. Prior to their final bill, a CDG Host may submit a Banked Allocation Request per section 5D to avoid forfeiture of credits banked at the CDG Host.
- iii. The new owner or entity responsible for the CDG Host project shall constitute a new CDG Host. The new CDG Host will be provided a new CDG Host account, Host ID, and allocation forms.

Allocation and Applied Credits

A CDG Satellite's Allocated Credit will be calculated each CDG Host billing period as per the Company's Value Stack Tariff. CDG Satellites are Applied Credits based on the CDG Satellite's bills with a bill period end date after the CDG Host Billing date. A CDG Satellite may have Value Stack Credits applied to their bill up to the amount of the electric portion of their bill. If the CDG Satellite



A. Host Summary Report

Host Account Information		
Customer name	Solar Array 123ABC	
Account number	10000000000	
Start of Billing Period	1/27/2024	
End of Billing Period	2/27/2024	
Net Generation		
Total Net generation this billing period(Kwh)	190474	
Net generation allocated to residential satellites	113534	
Net generation allocated to non-res satellites w/o demand	9122	
Net generation allocated to demand-metered satellites	67818	
Net generation allocated to host bank	0	
Value Stack Components		
Energy Component (\$/kWh)	\$0.029640	
Capacity Component (\$/kWh)	\$0.012680	
Environmental Component (\$/kWh)	\$0.024240	
Community Credit Component (\$/kWh)	\$0.00	
Subtotal Credit per kWh	\$0.066559	
Market Transition Credit (MTC)		
Residential MTC (\$/kWh)	\$0.025900	
Non-residential, non-demand MTC (\$/kWh)	\$0.030400	
Demand Reduction Value (DRV) and Locational System Relief Value (LSRV)		
DRV (monthly lump sum)	\$8.30	
LSRV (monthly lump sum)	\$0.00	
Non Mass Market Community Credit (NMMCC)		
NMMCC (\$/kWh)	\$0.01	
Credit Totals		

[illegible]

B. Applied Credit Report

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Applied Credits since last report, and the Balance Remaining. A move out indicator is provided when a Satellite account is no longer active.

Example without Net Crediting

Host Account Information																			
Utility Name:	NYSEG																		
Customer Name :	HOST A																		
Account Number :	12345678901																		
Vendor Number :																			
Start of period :	10/15/2024																		
End of period :	11/26/2024																		
Description	Account Number	Customer Name	Service class	Allocation %	Move-out	kWh	Energy	Capacity	Environmental	LSRV	DRV	MTC	NMMC C	Total VS Credit	CDG Net Credit	Utility Fee	Host Payment	CDG Savings Rate	Bill Period End Date
Previous Month's Bank Balance	12345678902	Satellite 1	7	0.153		77522	2489	936.75	2124.9	0	302.1	0	775.2	6628.03	0	0	0	0	
Allocated Credits	12345678902	Satellite 1	7	0		0	0	0	0	0	0	0	0	0	0	0	0	0	
Applied Credit	12345678902	Satellite 1	7	0.153		-69770	-2240	-843.08	-1912.41	0	-272	0	-697.7	-5965.2	0	0	0	0	10/15/2024
Applied Credit	12345678902	Satellite 1	7	0.153		-7752	-249	-93.67	-212.49	0	-30.2	0	-77.52	-662.8	0	0	0	0	11/15/2024
Balance Remaining	12345678902	Satellite 1	7	0		0	0	0	0	0	0	0	0	0	0	0	0	0	
Previous Month's Bank Balance	12345678903	Satellite 2	2	0.0401		20318	652.4	245.52	556.92	0	79.19	0	203.2	1737.16	0	0	0	0	
Allocated Credits	12345678903	Satellite 2	2	0		0	0	0	0	0	0	0	0	0	0	0	0	0	
Applied Credit	12345678903	Satellite 2	2	0.0401		-20318	-652	-245.52	-556.92	0	-79.2	0	-203.2	-1737.2	0	0	0	0	10/24/2024
Balance Remaining	12345678903	Satellite 2	2	0		0	0	0	0	0	0	0	0	0	0	0	0	0	

C. Cancel/Rebill

If a CDG Satellite is issued a cancel-rebill, the Allocation File that was effective on the bill period end date of the CDG Satellite's cancelled bill will be applicable for the rebill, including whether the CDG Satellite was a part of that CDG project or not. The Applied Credit report will include adjustments for Satellite Cancel/Rebills.

If a CDG Host rendered bill requires a correction, the Company will contact the CDG Host to discuss the issue and determine the appropriate steps for resolution.

6. CONFIDENTIAL INFORMATION AND DATA SECURITY REQUIREMENTS

The CDG Host agrees to enter into an agreement and abide by the Company's Data Security Requirements and Confidentiality Agreement. Hosts that receive or exchange customer information, other than email, from a direct connection with the Company's IT systems, the Data Security Agreement and Self Attestation must be signed.



7. NET CREDITING MANUAL

On December 12, 2019, the PSC issued the Order Regarding Consolidated Billing for Community Distributed Generation (“Net Crediting Order”), in Case 19-M-0463⁷ under which the policies, requirements and conditions for implementing Net Crediting were established.

Beginning April 1, 2021, the Companies will offer the Net Crediting Program as an option to any CDG Value Stack Project that is interconnected or filing for interconnection, within the Company’s service territory, subject to the eligibility requirements set forth herein. Submission of Net Crediting Enrollment materials can commence after January 1, 2021.

The Net Crediting Program allows satellites to receive one bill from their Company showing their Net Member Credits. This differs from the traditional CDG billing model where a satellite receives two bills, one from both the Company and one from the CDG Host. The Company will apply a portion of the CDG Project’s Value Stack Credits to the CDG Satellites’ electric Company accounts per NYSEG P.S.C. No. 120 and NYSEG P.S.C. No. 121 or RG&E P.S.C No.18 and RG&E P.S.C No. 19 and remit the remainder to the CDG Host, less the Utility Administrative Fee.

A. Definitions

1. **CDG Host Payment** is the monthly payment from the Company, separate from the CDG Host’s retail electric bill, to the CDG Host representing the sum of CDG Subscription Fees from the CDG Project for Net Credits applied to satellite accounts, less the Utility Administrative Fee which will be retained by the Company.
2. **CDG Savings Rate** is the rate used to calculate the value of the CDG Project’s monthly Value Stack Credits that will be provided by the Company to CDG Satellites’ electric Company accounts, allocated as directed by the CDG Host, where such rate shall not be less than five percent. For CDG Host bill periods ending prior to June 1st, 2025, the same CDG Savings Rate must be used for all CDG Satellites subscribed to the CDG Project, except for the Excluded Anchor Customer, if applicable. For CDG Host bill periods ending after June 1st, 2025, where parties have executed a CDG Net Crediting Agreement allowing multiple savings rates, a CDG Host may specify up to three different CDG Savings Rates for across CDG Satellites subscribed to the CDG project, except for Excluded Anchor Customers, if applicable.
3. **CDG Subscription Fee** is the amount of the Applied Credit withheld from a CDG Satellite’s Company bill for the amount owed to the CDG Host, calculated pursuant to NYSEG P.S.C. No. 120 and NYSEG P.S.C. No. 121 or RG&E P.S.C No.18 and RG&E P.S.C No. 19.

⁷ Case 19-M-0463 – In the Matter of Consolidated Billing for Distributed Energy Resources



4. **Excluded Anchor Customer** is a demand-billed, non-mass market Company electricity customer with average demand greater than or equal to 25kW in the last twelve months that enters into a contract to participate as an enrolled Satellite in the CDG Project that the CDG Host identifies as being excluded from the Net Crediting Program. If the CDG Host notifies the Company that the CDG Project has an Excluded Anchor Customer, the Company will not apply the CDG Savings Rate to Applied Credits for the Excluded Anchor Customer. For CDG Host Bill periods ending prior to June 1st, 2025, only one Excluded Anchor Customer may be excluded from the Net Crediting Program per CDG Project. For CDG Host bill periods ending after June 1st, 2025, where parties have executed a CDG Net Crediting Agreement allowing multiple savings rates, multiple Excluded Anchor Customers may be excluded from the Net Crediting Program per CDG Project.
5. **Net Crediting Program** is a voluntary program offered by the Company to CDG Hosts. The Company's Net Crediting Program as implemented pursuant to the Net Crediting Order where the Company applies a portion of the Applied Value Stack Credits to the CDG Satellites' electricity Company account and remits payment for the remainder to the CDG Host, less the Utility Administrative Fee.
6. **Net Crediting Subscription Contract** is the agreement between the CDG Host and each CDG Satellite participating in the Net Crediting Model.
7. **Net Member Credits** are the resulting credits on the CDG Satellite's electricity Company account calculated pursuant to NYSEG P.S.C. No. 120 and NYSEG P.S.C. No. 121 or RG&E P.S.C No.18 and RG&E P.S.C No. 19 , based on the CDG Project's monthly Value Stack Credits, the applicable CDG Savings Rate, the CDG Satellite's Allocation Percentages, the CDG Satellite's monthly retail charges, and the CDG Satellite's Banked Monetary Credits.
8. **Utility Administrative Fee** is the amount of the monthly value of the CDG Project's Value Stack Credits that the Company will retain, to cover implementation and administration of the Net Crediting Program, as approved by the Commission. The rate used to calculate the Utility Administrative fee is specified in the Company's Tariffs. The initial rate approved by the Commission is one percent and may be updated by the Company from time to time.

B. Net Crediting Host Enrollment Process

1. The CDG Host enrolls or re-enrolls the CDG Project by filling out and signing Appendix E, the Community Distributed Generation Net Crediting Agreement and submitting via email to NYSEG_CDG@nyseg.com or RGE_CDG@rge.com. The Company will sign and



return the Net Crediting Agreement to the CDG Host once all completed documents are received. A signed agreement must be received for each CDG Project to be enrolled in the Net Crediting Program.

2. The CDG Host must also complete Appendix F, the Net Crediting Consent Form and submit via email to NYSEG_CDG@nyseg.com or RGE_CDG@rge.com. On this form, the CDG Host shall designate an initial CDG Savings Rate which will be applicable to all CDG Satellites for the CDG Project.
3. The CDG Host must be current on their utility account tied to the CDG Host project to be eligible and participate in Net Crediting.
4. If the CDG Host identifies an Excluded Anchor Customer in the Net Crediting Consent Form, the Company will not apply a CDG Savings Rate to the Excluded Anchor Customer's Applied Credits. The Company will not pay the CDG Host a CDG Subscription Fee for the Excluded Anchor Customer.
5. The CDG Host must complete and submit the following documents to NYSEG_CDG@nyseg.com or RGE_CDG@rge.com:
 - Appendix G (W9 Form)
 - Appendix H (Vendor Creation Modification Form)
 - Appendix I (ACH Authorization Form) plus a voided check or banking information on either bank signed letterhead or vendor signed letterhead per requirements in Appendix I.
 - Business Classification Form

NOTE: The Company will not split payments between the owner and any other agent of the project. Avangrid can only establish one ACH account per Company, per Vendor, per Tax Identification number, regardless of the business purpose

6. By signing the Net Crediting Consent Form and submitting Net Crediting Allocation Requests, the CDG Host certifies they have entered into written contracts with each of its CDG Satellites acknowledging that each CDG Satellite will receive Net Credits pursuant to the Net Crediting Program.
7. A new CDG Host resulting from a transferring ownership of the Value Stack project or party responsible for utility billing account tied to a CDG project wishing to participate in Net Crediting, shall execute and submit all required enrollment documentation as described above, at least sixty days prior to the final meter read date of the prior CDG Host.



C. Net Crediting Allocation Requests

1. When a project is accepted into the Net Crediting Program, they will be given a Net Crediting Allocation Request File. This file should be used instead of the standard Allocation Request File to designate monthly Host and Satellite allocations. Included on the Net Crediting Allocation File will be a place where the Host must fill in the CDG Savings Rate for each Allocation Request that is sent in (see Appendix C).
2. While the Net Crediting Allocation request form is in a different format from the Subsequent Value Stack CDG Allocation Request, the process is the same as Subsequent Allocation Requests described above.
3. The Net Crediting Savings Rate applicable to each Satellite must be specified on the Net Crediting Allocation request form.
4. If applicable, the savings rate for Excluded Anchor Customers must be set to 100%.

D. Net Crediting Process Timelines

1. For new CDG Projects wishing to enroll in the Net Crediting Program, the necessary documents, as described above, must be approved no less than 60 days prior to commencing CDG billing. CDG Net Crediting will be effective with the first CDG Host bill, only if all net crediting enrollment documentation is completed and received 60 days prior to the first CDG Host bill. Otherwise, CDG Net Crediting will be effective with the next CDG Host bill on or after 60 days from which the Company received all completed net crediting enrollment documentation.
2. For active CDG Projects wishing to enroll in the Net Crediting Program, the necessary documents, as described above, must be approved no less than 60 days prior to the CDG Host Account's cycle billing date to which the modifications apply. The Company will advise the CDG Host of the CDG Host Bill effective date that Net Crediting will begin. The Company will use its best efforts to enroll projects as soon as possible.
3. CDG Satellites will begin receiving their Net Credits for bill periods ending after the CDG Host Bill effective date.
4. If a project wants to unenroll from the Net Crediting Program, the CDG Host must submit a completed Net Crediting Consent Form requesting to unenroll in the Net Crediting Program no less than 45 days prior to the CDG Host Account's cycle billing date to which



the modifications apply. The CDG Host must provide a termination letter with self-certification that CDG Satellites have been notified of the unenrollment and that they will no longer receive net credits from the CDG Host project as of the termination effective date.

5. For active CDG Projects wishing to re-enroll, the CDG Host will be able re-enroll 12 months after unenrolling from the Net Crediting Program.
6. The CDG Host Payments will occur via ACH monthly, after each CDG Host read date. See section H below for more details.

E. CDG Savings Rate

1. For CDG Host bill periods ending prior to June 1, 2025, the CDG Savings Rate for the Host can be updated once every six months, during the months of March and September, by submission via the Net Crediting Allocation Request. The CDG Host may update the CDG Savings Rate no earlier than six months from the initial effective date of the CDG Host's enrollment in the Net Crediting Program. The CDG Host shall comply with the Subsequent Allocation CDG Procedures and Timelines to change the CDG Savings Rate.
2. For CDG Host bill periods ending after June 1, 2025, a CDG Host must specify the CDG Savings Rate applicable to each Satellite on every initial or subsequent allocation request.
3. For CDG Host bill periods ending after June 1, 2025, where parties have executed a CDG Net Crediting Agreement allowing up to three different multiple savings rates, a CDG Host may specify up to three different savings rates across their Satellites on initial or subsequent allocation requests. If the current executed CDG Net Crediting Agreement only allows for one CDG savings rate, the CDG Host must use the same CDG Savings Rates for their Satellites.
4. The CDG Host must ensure they have affirmative consent from all affected customers prior to submitting a reduction to a Satellite's CDG Savings Rate.
5. The CDG Savings Rate shall be a minimum of five percent and no greater than 100 percent minus the Utility Administration Fee percentage rate.
6. The CDG Savings Rate shall have the precision of no more than one decimal place expressed in whole percentage increments (e.g. 0.071, 7.1%) and be specified as a decimal on the Net Crediting Allocation Request File.



7. The CDG Savings Rate will become effective on the same date to which the CDG Satellite allocations are effective. The CDG Savings Rate will be applicable to Satellite bills with a bill period end date on or after the Savings Rate effective date.
8. The CDG Savings Rate applicable to Banked Allocation Requests will be the same as the CDG Savings Rate effective for Subsequent Allocation Requests processed during the same period.

F. Excluded Anchor Customer

1. Excluded Anchor Customers can be updated monthly and should be submitted on the Allocation Request. The CDG Host shall comply with the Subsequent Allocation CDG Procedures and Timelines.
2. The updated Excluded Anchor Customer will become effective on the same date to which the CDG Host Account's cycle billing date to which the allocations apply, including any from a Banked Allocation Request. The Excluded Anchor Customer will be applicable to the affected Satellite bills with a bill period end date after the Excluded Anchor Customer's effective date.
3. The CDG Savings rate will not apply to the Excluded Anchor Customer, if applicable.

G. Calculation of the Net Credit, CDG Satellite Payment and Utility Administrative Fee

1. Regardless of the CDG Savings Rate in effect at the time of invoicing, the CDG Savings Rate applied to a CDG Satellite's bill will be the rate in effect, as described in E.4., on the CDG Satellite's bill period end date.
2. A CDG Subscription Fee will be calculated for a CDG Satellite's Applied Credit each billing period. The CDG Subscription Fee is equal to the amount of the Applied Credit multiplied by a percentage equal to one minus the CDG Savings Rate.
3. The Utility Administrative Fee is equal to the Applied Credit multiplied by the Utility Administrative Fee percentage rate. Note: The rate used will be the rate effective at the time the CDG Satellite's Applied Credit is calculated.
 Using the above example, the Utility Administrative Fee is
 \$0.90 (*i.e.*, \$90 Applied Credit multiplied by the one percent
 Utility Administrative Fee).
4. If the CDG Host identifies an Anchor Customer, the Company will not apply any CDG Subscription Fee to the Anchor Customer's portion of the Applied Credit.



5. For the first billing cycle to which Net Crediting is applicable and all subsequent billing cycles, the CDG Savings Rate will be applied to any Satellite Banked Monetary Credits and Host Bank allocation applied to the CDG Satellite's bill that month. This includes any Satellite Banked Monetary Credits and Host Bank allocation that existed on the CDG Satellite's account prior to the Project's participation in the Net Crediting program.
6. Each billing period, the Company shall post the Applied Credit to the CDG Satellite's electricity charges and post a debit for the CDG Subscription Fee, resulting in a Net Credit to the Satellite.

Example of the CDG Net Crediting model.



H. Net Crediting Payments to CDG Host

1. Payments will be issued within 40 days of rendering a CDG Host Bill.
2. Payments will equal the Net CDG Subscription fees applied to Satellite accounts for the period between the prior CDG Host bill and current Host bill, less the amount owed to the Company for applicable Utility Administrative Fees.
3. A Company's cancel/rebill of a CDG Satellite results in recalculation of their Net Credit and therefore an adjustment to the CDG Subscription Fee and Host payment.
4. The Company will continue to make payment to the CDG Host for CDG Satellites in arrears on their utility account.
5. The Company must receive changes to banking information at least 60 days prior to the CDG Host Account's cycle billing date on which the banking information will become effective. To request a change, resubmit Appendix I - ACH Authorization Form and necessary documentation to NYSEG_CDG@nyseg.com or RGE_CDG@rge.com.

I. Host Summary Report

For CDG projects participating in the Net Crediting program there is a field on the end for the CDG Savings Rate applicable to each Satellite. An example for the Satellite detail is below.

	Customer Name	Service Class	Distribution Percentage	Move-Out	MTC Eligible	KWH Allocation	Energy Plus Losses	Capacity	Environmental	MTC	DRV	LSRV	Community Credit	NMMCC	Total Credit	CDG Savings Rate
10000000000	Solar Array 123ABC	SC06	0		No MTC	0	0	0	0	0	0	0	0	0	0	0.0
10000000001	Satellite 1	SC02	0.01676		No MTC	3193	94.62	40.48	77.41	0	0.39	0	0	31.94	244.84	10.0
10000000002	Satellite 2	SC02	0.00481		No MTC	916	27.16	11.62	22.22	0	0.11	0	0	9.17	70.28	10.0
10000000003	Satellite 3	SC01	0.00483		Res MTC	920	27.27	11.67	22.31	23.84	0	0	0	0	85.09	5.0
10000000004	Satellite 4	SC01	0.00413		Res MTC	786	23.32	9.97	19.07	20.38	0	0	0	0	72.74	7.5
10000000005	Satellite 5	SC01	0.0023		Res MTC	438	12.98	5.55	10.62	11.35	0	0	0	0	40.5	5.0
10000000006	Satellite 6	SC01	0.00108		Res MTC	205	6.1	2.61	4.98	5.33	0	0	0	0	19.02	5.0
10000000007	Satellite 7	SC02	0.04448		No MTC	8475	251.12	107.43	205.45	0	1.04	0	0	84.76	649.8	5.0



J. Applied Credit Report

For CDG projects participating in the Net Crediting program there are fields on the Applied Credit Report indicating the CDG Net Credit, Utility Fee, Host Payment, and CDG Savings Rate by Satellite. Payments will reflect the amounts in the Applied Credit Report. An example of the Applied Credit Report is below.

Host Account Information																			
Utility Name:	NYSEG																		
Customer Name:	HOST A																		
Account Number:	12345678901																		
Vendor Number:	999999																		
Start of period:	10/15/2024																		
End of period:	11/26/2024																		
Description	Account Number	Customer Name	Service class	Allocation %	Move-out	kWh	Energy	Capacity	Environmental	LSRV	DRV	MTC	NMMCC	Total VS Credit	CDG Net Credit	Utility Fee	Host Payment	CDG Savings Rate	Bill Period End Date
Previous Month's Bank Balance	12345678902	Satellite 1	7	0.153		77522	2489	936.75	2124.9	0	302.1	0	775.23	6628.03	0	0	0	0	
Allocated Credits	12345678902	Satellite 1	7	0		0	0	0	0	0	0	0	0	0	0	0	0	0	
Applied Credit	12345678902	Satellite 1	7	0.153		-69770	-2240	-843.08	-1912.41	0	-272	0	-697.7	-5965.2	596.52	59.7	5309.06	10	10/15/2024
Applied Credit	12345678902	Satellite 1	7	0.153		-7752	-249	-93.67	-212.49	0	-30.2	0	-77.52	-662.8	66.28	6.63	589.89	10	11/15/2024
Balance Remaining	12345678902	Satellite 1	7	0		0	0	0	0	0	0	0	0	0	0	0	0	0	
Previous Month's Bank Balance	12345678903	Satellite 2	2	0.0401		20318	652.4	245.52	556.92	0	79.19	0	203.18	1737.16	0	0	0	0	
Allocated Credits	12345678903	Satellite 2	2	0		0	0	0	0	0	0	0	0	0	0	0	0	0	
Applied Credit	12345678903	Satellite 2	2	0.0401		-20318	-652	-245.52	-556.92	0	-79.2	0	-203.2	-1737.2	173.72	17.4	1546.07	10	10/24/2024
Balance Remaining	12345678903	Satellite 2	2	0		0	0	0	0	0	0	0	0	0	0	0	0	0	

K. Satellite Removal from an Active Net Credit Project

1. For CDG Satellite accounts that receive a final bill, the disposition of remaining credits will be done as described above in Section 5.E. The Company will cease payment to the CDG Host for any remaining CDG satellite credits.
2. For active Company accounts, former CDG Satellites of a CDG Host participating in Net Crediting (Company accounts without an allocation for the most recent CDG Host Bill) will continue to receive Net Credits resulting from any prior Satellite Banked Monetary Credits until such bank is depleted.

L. Bill Message

1. A CDG Host participating in Net Crediting can designate one bill message for presentment on their CDG Host's Satellite invoices. The same bill message will appear on all Satellite Invoices until a revision is requested.
2. A bill message can consist of up to 480 characters (i.e., eight lines each with sixty (60) characters).
3. Initially, a CDG Host can request a bill message on the CDG Net Crediting Request form (Appendix F).



4. A CDG Host can change a bill message once every 3 months by sending an email to NYSEG_CDG@NYSEG.com or RGE_CDG@RGE.com, with “Update Bill Message” in the Subject line at least two weeks prior to the effective date. Please specify the CDG project Host ID, Host name, requested effective date, and bill message text.

M. Bill Print

1. See appendix J, for CDG Satellite communications containing sample bill images.

N. Additional Items

1. If the CDG Host receives a CDG Satellite subscription fee payment directly from a CDG Satellite for an applied credit in which the CDG Host also received payment from the Company, the CDG Host will return such payment to the CDG Satellite.
2. A CDG Host may not charge any additional fee or otherwise require additional payment outside of the Net Crediting arrangement for mass market customers.
3. If the CDG Host fails to pay any tariff charges on the CDG Host account for which a written bill has been rendered:
 - i. and arrears exceed 30 days, then the Company shall withhold the CDG Host payment until the CDG Host has provided payment of the full amount in arrears.
 - ii. and arrears exceed 90 days, the Company shall remove the CDG Host from the CDG Net Crediting Program.
4. In the event a CDG Host inadvertently submits an incorrect CDG Savings Rate for a Satellite, the Companies will not retroactively modify Satellite’s CDG Savings Rate previously accepted on an allocation form submitted by the CDG Host.
5. The CDG Sponsor shall handle customer inquiries and complaints from CDG Satellites related to the CDG Project and such calls will not be handled by the Utility. The Utility will remain responsible for resolving Utility billing-related customer inquiries and complaints
6. Budget Billed customers will see their monthly electric installments reduced on each bill by the Net Credit amount.
7. Cancel/Rebill
 - i. If a Satellite is issued a cancel rebill, the type of crediting (Net Crediting or 100% of the Applied Credits) that was effective on the bill period end date of the cancelled bill will be applicable for the rebill, including former Satellites of CDG Host.



- ii. If a Satellite is issued a cancel rebill, the CDG Savings Rate that was effective on the bill period end date of the cancelled bill will be applicable for the rebill.

8. Taxes

- i. The Company is not responsible for assessing or collecting any taxes on payments made to the CDG Host.
 - ii. CDG Hosts have the obligation of remitting any applicable taxes on subscription fees to the appropriate federal, state, or local taxing authority.
 - iii. The Company will not report CDG Host payments under Net Crediting to the Internal Revenue Service as income and no Form 1099's will be issued to CDG Host payments.
9. If the Company declares a Force Majeure event, the timelines and processes outlined in this Procedure may be impacted.



8. TRACK CHANGES

This section is used to track changes to this document.

Effective Date (MM/DD/YYYY)	Revision Title	Revision Description
10/01/2020	Original Document	Original Document Effective
04/01/2021	60/40 Rule: 5.B.V 7.A.5	Included “average demand” when describing customers in the 40% large bucket to align with 02/12/2021 PSC Order “ORDER CLARIFYING COMMUNITY DISTRIBUTED GENERATION MEMBERSHIP REQUIREMENTS”
1/1/2024	Updates for automation	Updates to procedures and reports tied to CDG Value Stack implementation in December 2023. Note – project conversion to automation to be completed by June 2025.
5/12/2025	Multiple Savings Rates	Modifications to effectuate multiple savings rates and anchor customers as of June 1, 2025 in compliance with Order Approving Multiple Savings Rates for CDG Subscribers issued and effective May 16, 2024 under PSC Case 21-0629.




Appendices

Level of confidentiality: **Public**



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Appendix A – CDG Host Information Form



Part of the Avangrid family

CDG Value Stack Host Information Form

Please email all inquiries and documents pertaining to CDG to NYSEG_CDG@nyseg.com or RGE_CDG@rge.com.

Company: ☐ NYSEG ☐ RG&E SIR Project ID:

CDG Project Host Name:

CDG Developer/Owner:

Authorized Agent (If applicable, must provide Appendix D):

Host Utility Bill Information:

Service Address (Street, City, Zip):

Mailing address:

Email contact:

Email contact for phone line/meter issues (maximum of 3):

Satellite Utility Bill Information*:

Project Name as it is to appear on CDG Satellites' bills:

Project Contact Phone Number to appear on Satellites' bills:

Project Mailing Address to appear on Satellites' bills:

Project Website to appear on Satellites' bills:

*Note: Project name, Phone Number, Mailing Address, and Website will be available on satellites' bills after automation

Project Size (kW AC):

Capacity Alternative Selection: ☐ Alternative 1 ☐ Alternative 2 ☐ Alternative 3

Non-Residential Generation Type (check one):

☐ Solar electric generating equipment with a rated capacity less than or equal to 5,000 kW

☐ Wind electric generating equipment with a rated capacity less than or equal to 5,000 kW

☐ Micro-hydroelectric electric generating equipment with a rated capacity less than or equal to 5,000 kW

☐ Fuel cell electric generating equipment with a rated capacity less than or equal to 5,000 kW

☐ Farm waste electric generating equipment with a rated capacity less than or equal to 5,000 kW

Storage Information (If Applicable):

☐ Storage Exclusively Charged from Eligible Generator

☐ Storage Controls Configuration

☐ Storage Import Netting Configuration

☐ Storage Default Configuration

Company Use Only:

Host ID: Account Number: MTC or CC Tranche:

Environment based on 25% payment date: Non-Mass Market Community Credit Adder applicable:



CDG-0002

Level of confidentiality: **Public**



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Appendix B – CDG Host Certification



CDG Value Stack Host Certification

Company: ☐ NYSEG ☐ RG&E

SIR Project File Number:

Account Name:

Check One: ☐ Initial CDG Certification ☐ Annual CDG Host Certification

- ☐ I certify that this CDG application meets all terms and conditions of NYSEG P.S.C. No. 119, P.S.C. No. 120, and P.S.C. No. 121 or RG&E P.S.C. No. 18 and P.S.C. No. 19 scheduled for Electric Service Rate Information and requirements of the PSC that are adopted pursuant to its Orders issued in Case 15-E-0082, Case 15-M-0180, Case 15-E-0751, and Case 19-M-0460, as they may be amended or superseded from time to time.
- ☐ I certify that the CDG Host is a non-residential customer who owns or operates electric generating equipment as described in NYSEG Tariff P.S.C. No. 120 40.B.1 and RG&E Tariff P.S.C. No. 19 26.B.1 and whose net energy produced by its generating equipment is applied to accounts of other electric customers ("CDG Satellites") with which it has a contractual arrangement related to the disposition of credits.
- ☐ I certify that the CDG Host has a contract in writing with each of their satellite customers and ensures all CDG Satellites meet participation requirements.
- ☐ I certify that the Company shall not be responsible for any contractual arrangements or other agreements between the CDG Host and CDG Satellites, including contractual terms, pricing, dispute resolution and contract term.
- ☐ I certify that the CDG Host is certifying in writing to the Company, both prior to commencing service under CDG and annually thereafter, that it has met the all requirements established and is in compliance with all applicable laws and meets the terms of the Confidentiality Agreement and Data Security Rider or Data Security Agreement if CDG Host has electronic connections to the Company other than email.
- ☐ I certify that the CDG Satellite Accounts with demands of 25kW or greater listed with this application receive, in aggregate, no more than 40 percent of the generator's output.
- ☐ I certify that each Satellite allocation distribution percentage must amount to at least 1,000 kWh annually but may not exceed the CDG Satellite Account's historic average annual kWh usage (or forecast usage if historic data is not available).
- ☐ I certify that all CDG Satellite Accounts, whether submitted with the initial application or subsequently, are located in the Company's service territory.
- ☐ I certify that the sponsor (CDG Host) of this project meets all criteria outlined and agreed upon between the Parties in the CDG VDER Procedural Requirement document as may be revised, modified, amended, clarified, supplemented or superseded from time to time.
- ☐ I certify that the sponsor of this project (CDG Host) will satisfy all obligations assumed with respect to project members (CDG Satellites).
- ☐ To the best of my knowledge, the information provided herein is accurate and no attempt has been made to misrepresent the facts.
- ☐ I will re-submit these certifications to the Company on an annual basis.

CDG-0002

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CDG Value Stack Host Certification

Name of Applicant:

Signature: Signature must be in ink or submitted with electronic signature

Date:

Telephone:

Email:

Affiliation to person responsible for account: (Check One)

- ☐ Owner
- ☐ Partner
- ☐ Agent (Attach Appendix D – Agent Authorization Form)
- ☐ Corporate Officer
- ☐ Other (specify)

Level of confidentiality: **Public**



Request Forms:

For Value Stack CDG projects sending separate Satellite bills, the CDG Host shall request initial and subsequent allocations using the following form:

NYSEG_RG&E Value Stack Allocation Request Form.xlsx

For Value Stack CDG projects with Net Crediting, the CDG Host shall request initial and subsequent allocations using the following form:

NYSEG_RG&E Net Crediting Value Stack Allocation Request Form.xlsx

For Value Stack CDG projects, the CDG Host shall request banked allocations using the following form:

NYSEG_RG&E Value Stack Bank Allocation Request Form.xlsx

Avangrid SFTP Site Access:

Access will be granted for all email addresses provided in the CDG Value Stack Data Exchange Contact form. A data exchange form must be submitted for each project. Access instructions and a password will be emailed separately to each email address.

Passwords will need to be reset every 90 days. Access will be granted initially for 10 years. Prior to access expiring, emails will be sent requesting a response back to confirm access should be extended.

The Host shall send an email to NYSEG_CDG@nyseg.com and/or RGE_CDG@rge.com to request access for additional emails or to remove access for someone.

Initial, Subsequent and Banked Allocation Requests

A project folder for each Host ID will be created and visible for all users with access to the project. The Host ID is assigned by the Company and provided in the “Company Use Only” section of the CDG Host Information Form.

All initial, subsequent, and bank allocation requests must be uploaded in Avangrid’s SFTP Site to the proper Host ID folder and inbound folder and follow the data exchange nomenclature and format documented below for the Company to process the allocation request.

Acceptance or denial responses to a processed request will be available within two business days and placed in the Host ID’s outbound folder.

Inbound File Format:

Level of confidentiality: **Public**



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Allocation requests must be saved and submitted as a *text (tab delimited) file*. All initial, subsequent, and bank allocation requests must be uploaded in Avangrid's SFTP Site to the proper Host ID folder and inbound folder using the file nomenclature documented below for the Company to process the allocation request. Special characters should not be included in the Host or Satellite name. If a file is not processed within 24 hours, please check the file name, ensure the file is in the proper Host ID inbound folder and, is a text tab delimited file. If no revisions are required, email NYSEG_CDG@nyseg.com or RGE_CDG@rge.com.

File Naming Conventions:

The CDG Host shall submit allocation requests using the applicable nomenclature:

- Initial Request: **HOSTID_INIT_YYYYMMDDHHMM**
- Subsequent Request: **HOSTID_SUB_YYYYMMDDHHMM**
- Bank Request: **HOSTID_BANK_YYYYMMDDHHMM**

*File must be saved as a Text (tab delimited) file and then uploaded to the FTP site.

Example Initial Allocation Request for CDG projects billing customers separately:

	A	B	C	D	E	F	G
1	D	File Creation Date	File Creation Time	Utility Company	Host ID	Allocation Type	Remove Rejected Satellites
2	H	20230731	153855	RGE		INIT	
3	D	Host Account # (No Dashes)	Host Account Name	Host Allocation %			
4	D			0.500	MUST BE 100		
5	O			0.500			
6	D	Satellite Account #s (No Dashes)	Satellite Account Name	Satellite Allocation %	Satellite 60/40 Exemption Rule Indicator		
7	D						
8	D						
9	D						
10	D						

Example Initial Net Crediting Allocation Request:

	A	B	C	D	E	F	G
	D	File Creation Date	File Creation Time	Utility Company	Host ID	Allocation Type	Remove Rejected Satellites
	H	20240709	184441	RGE		INIT	Y
	D	Host Account # (No Dashes)	Host Account Name	Host Allocation %			
	D			0.000	MUST BE 100		
	O						
	D	Satellite Account #s (No Dashes)	Satellite Account Name (No Special Characters)	Satellite Allocation %	Satellite 60/40 Exemption Rule Indicator	Net Crediting Anchor Customer	Net Crediting CDG Savings Rate
	D						
	D						
	D						
	D						
	D						
	D						

Outbound File:

Level of confidentiality: **Public**



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The Company shall complete the Utility sections of the allocation request form. Completed requests shall be provided in the outbound folder for the Host ID folder in Avangrid's SFTP site within two business days of processing.

Outbound File Naming Convention:

The Company shall provide completed allocation requests using the following nomenclature:

Outbound Accepted

Initial Request:

HOSTCS0023_INIT_YYYYMMDDHHMM_ACCEPTED_YYYYMMDDHHMM

Subsequent Request:

HOSTCS0023_SUB_YYYYMMDDHHMM_ACCEPTED_YYYYMMDDHHMM

Banked Request:

HOSTCS0023_BANK_YYYYMMDDHHMM_ACCEPTED_YYYYMMDDHHMM

Outbound Rejected

Initial Request:

HOSTCS0023_INIT_YYYYMMDDHHMM_REJECTED_YYYYMMDDHHMM

Subsequent Request:

HOSTCS0023_SUB_YYYYMMDDHHMM_REJECTED_YYYYMMDDHHMM

Banked Request:

HOSTCS0023_BANK_YYYYMMDDHHMM_REJECTED_YYYYMMDDHHMM

Validation:

As described in Section 5 paragraphs A, B and C, the Company shall review the submitted application and either accept or deny the request. The Company shall provide error messages for the accounts that are found to be invalid.

a. Review Process:

If the CDG Host information fails validation the request will be rejected, and validation will not be performed on the Satellite accounts.

Rejected files will include rejection reason codes, for example:

Beginning Validation Rejected Reasons:



- i. Rejected - Invalid Company
- ii. Rejected - Invalid File Type
- iii. Rejected - Missing Host ID
- iv. Rejected - Host ID Mismatch to File Name
- v. Rejected - File Type Mismatch to File Name
- vi. Rejected - INIT File not confirmed
- vii. Rejected - Not within approved time frame for submittal
- viii. Rejected - One file per Billing Period
- ix. Rejected - Record Identifier for 1st record not H
- x. Rejected - Record Identifier for 2nd record not O
- xi. Rejected - Record Identifier for last record not T
- xii. Rejected - Record Identifier for records 3 up to the Trailer record must be S
- xiii. Rejected - # of file records do not match trailer

Host Validation Rejected Reasons:

- i. Invalid - Host Account Number
- ii. Invalid - Host ID not valid for Host Account Number
- iii. Invalid - Missing decimal in Allocation
- iv. Invalid - Allocation
- v. Invalid - Missing decimal in Banked Amount
- vi. Invalid - Banked Amount
- vii. Invalid - Banked Amount more than available banked amount for Host

Satellite Validation Rejected Reasons

- i. Invalid - Account Not Found
- ii. Invalid - Account Not Active
- iii. Invalid - Not Eligible
- iv. Invalid - No Active Electric Service
- v. Invalid - Service Classification
- vi. Invalid - Already a CDG Satellite
- vii. Invalid - Net Meter
- viii. Invalid - CDG Account with banked credits
- ix. Invalid - Remote Net Meter
- x. Invalid - Account not CDG Satellite-
- xi. Invalid - Missing decimal in Allocation
- xii. Invalid - Allocation
- xiii. Invalid - Satellite 60/40 Rule Exemption Identifier must be Y if populated
- xiv. Invalid - Missing Net Crediting Savings Percentage



- xv. Invalid - Net Crediting Savings Percentage not applicable for Non-Net Crediting Host
- xvi. Invalid - Missing decimal in Net Savings Credit
- xvii. Invalid - Net Credit Savings Percentage update not allowed-
- xviii. Invalid – Net Crediting Savings Percentage
- xix.
- xx. Invalid - Net Credit Anchor Account does not meet demand billed requirement
- xxi. Invalid - Duplicate Account

End Validation Rejected Reasons:

- i. Rejected - Allocation does not equal 100%
- ii. Rejected - Minimum # of satellites not met
- iii. Rejected - # of net credit anchor accounts exceeds minimum allowed
- iv. Rejected - Allocations > 40% for satellites with 25 kW or greater
- v. Rejected – More than three different CDG Savings Rates





Example Satellite Validation:

D	File Creation Date	File Creation Time	Utility Company	Host Id	Allocation Type	Remove Rejected Satellites	Acceptance/Rejection	Anniversary Month	Effective Date
H	20200430	110301	NYSEG	HostDs001	INIT	N	Rejected - Missing Host ID		
D	Account #	Customer Name	% Allocation	Net Credit Savings %	Valid/Invalid				
O	10025555555	Host One	0.000	10.00	Invalid - Allocation				
D	Account #	Customer Name	% Allocation	60/40 Rule Exemption Identifier	Net Credit Anchor Indicator	Valid/Invalid	Service Class	Billing Cycle	ESCO Indicator
S	10000000056	John Smith	7.000						
S	10000000233	Mark Miles	20.200	Y					
S	10000000098	Jerry Kowalski	1.500						
S	10000000400	Fred Harley	5.820						
S	10000000044	Jennifer Howe	7.421						
S	10000000003	Acme Foods	40.000		Y				
S	10000000089	Kimberly Kline	5.000						
S	10000000703	Howard Flint	0.099						
S	10000000655	Tim Johnson	2.510						
S	10000000001	Franklin Morse	6.800						
S	10000000014	William Coste	3.650						
T	13								

D	File Creation Date	File Creation Time	Utility Company	Host Id	Allocation Type	Remove Rejected Satellites	Acceptance/Rejection	Anniversary Month	Effective Date
H	20200430	110301	NYSEG	HostDs001	INIT		Rejected		
D	Account #	Customer Name	% Allocation	Net Credit Savings %	Valid/Invalid				
O	10025555555	Host One	150.000	10.00	Invalid - Allocation				
D	Account #	Customer Name	% Allocation	60/40 Rule Exemption Identifier	Net Credit Anchor Indicator	Valid/Invalid	Service Class	Billing Cycle	ESCO Indicator
S	10000000056	John Smith	7.000						
S	10000000233	Mark Miles	20.200	Y					
S	10000000098	Jerry Kowalski	1.500						
S	10000000400	Fred Harley	5.820						
S	10000000044	Jennifer Howe	7.421						
S	10000000003	Acme Foods	40.000		Y				
S	10000000089	Kimberly Kline	5.000						
S	10000000703	Howard Flint	0.099						
S	10000000655	Tim Johnson	2.510						
S	10000000001	Franklin Morse	6.800						
S	10000000014	William Coste	3.650						
T	13								



Appendix D – Agent Authorization

 		Agent Authorization	
Company:		<input type="checkbox"/> NYSEG	<input type="checkbox"/> RG&E
SIR Project File Number:		<input type="text"/>	
(To be completed by the host for any agent expected to receive or provide account information.)			
I <input type="text"/>		, authorize my agent	
<small>Print Host Name</small>			
<input type="text"/>		to act on my behalf on all matters pertaining	
<small>Print Agent Name & Agent Company Name</small>			
to the management of the <input type="text"/>		Community Distributed Generation project located	
<small>Size in KW</small>			
at <input type="text"/>			
<small>Address of Host Account, City, NY, Zip code</small>			
If you have any questions, I can be reached at <input type="text"/>			
<small>Phone #</small>			
Sincerely,			
<input type="text"/>		Date	<input type="text"/>
<small>Signature must be in ink or submitted with electronic signature</small>			
<input type="text"/>		Title	<input type="text"/>
<small>Print Name</small>			
<small>CDG-0003</small>			

Level of confidentiality: **Public**



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Appendix E – Net Crediting Agreement

located on website: [CDG Net Crediting Service Agreement - NYSEG](#) or [CDG Net Crediting Service Agreement - RG&E](#)

Community Distributed Generation Net Crediting Agreement for [_____]

This Agreement ("Agreement") is made this _____ day of _____, 20____,
Between New York State Electric and Gas (NYSEG) and Rochester Gas and Electric (RGE), a New
York Domestic Business Corporation with a principal place of business at 18 Link Dr. Binghamton, NY
13904 and

_____, a community distributed
generation ("CDG") sponsor (the "CDG Sponsor" or "Sponsor"), a [state]_____ [type of legal
entity]_____ with a principal place of business at
_____. The Utility and the CDG
Sponsor are also individually referred to herein as a "Party" or collectively as "Parties."

Whereas, the New York State Public Service Commission ("Commission") first authorized
CDG in its July 17, 2015 Order Establishing a Community Distributed Generation Program and
Making Other Findings in Case 15-E-0082 to enable a broader community participation in
renewable programs;

Whereas, the Commission subsequently issued its March 9, 2017 *Order on Net Metering
Transition, Phase One of Value of Distributed Energy Resources, and Related Matters* ("VDER
Transition Order") in Case 15-E-0751 which in part provided for modifications to the
compensation of Distributed Energy Resources ("DERs") by creating the Value Stack
compensation mechanism for eligible DERs, including CDG projects;



Appendix F – Net Crediting Consent Form



CDG Net Crediting Consent Form

Check One: ☐ Enroll ☐ Unenroll

Company: ☐ NYSEG ☐ RG&E

Project ID:

CDG Host Name:

CDG Host Account #:

Initial bill message, if any*:

**Note: Bill Message will be available after automation*

Net Crediting Checklist

The CDG Host shall review and complete all documents listed below. Please submit documents via encrypted email to NYSEG_CDG@NYSEG.com or RGE_CDG@RGE.com. The Company will notify the CDG Host via email upon receipt of all completed enrollment documents.

- ☐ Appendix E: CDG Net Crediting Service Agreement
- ☐ Appendix F: CDG Net Crediting Consent Form
- ☐ Appendix G: W9 Form
- ☐ Appendix H: Vendor Creation Modification Form
- ☐ Appendix I: ACH Authorization Form
- ☐ Supporting bank document (Voided check, bank signed letterhead, or vendor signed letterhead)
- ☐ Business Classification Form

Signature:

Signature must be in ink or submitted with electronic signature

Print Name & Title:

Date:

Level of confidentiality: **Public**



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Appendix G – W9 Form

Form W-9 (Rev. November 2017) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification ▶ Go to www.irs.gov/FormW9 for instructions and the latest information.	Give Form to the requester. Do not send to the IRS.
Print or type. See Specific instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶	
	<input type="checkbox"/> Other (see instructions) ▶	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ (Applies to accounts maintained outside the U.S.)	
5 Address (number, street, and apt. or suite no.) See instructions.		
6 City, state, and ZIP code		
7 List account number(s) here (optional)		
Part I Taxpayer Identification Number (TIN) Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later. Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.		
Part II Certification Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.		
Sign Here	Signature of U.S. person ▶ _____	Date ▶ _____
General Instructions Section references are to the Internal Revenue Code unless otherwise noted. Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9 . Purpose of Form An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following. • Form 1099-INT (interest earned or paid) • Form 1099-DIV (dividends, including those from stocks or mutual funds) • Form 1099-MISC (various types of income, prizes, awards, or gross proceeds) • Form 1099-B (stock or mutual fund sales and certain other transactions by brokers) • Form 1099-S (proceeds from real estate transactions) • Form 1099-K (merchant card and third party network transactions) • Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition) • Form 1099-C (canceled debt) • Form 1099-A (acquisition or abandonment of secured property) Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN. If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See <i>What is backup withholding</i> , later.		

Cat. No. 10231X

 Form **W-9** (Rev. 11-2017)


Appendix H – Vendor Creation Modification Form



FORM-US-03

Vendor Creation/Modification Form

AVANGRID vendor ID #

➤ Contact Person:

Name: <input type="text"/>		
E-mail ⁽¹⁾ : <input type="text"/>	Phone: <input type="text"/>	

➤ Payment Remittance Address (ALL fields are required):

Name: <input type="text"/>		Tax ID: <input type="text"/>	
DBA: <input type="text"/>		Country: <input type="text"/>	
Address: <input type="text"/>			
City: <input type="text"/>	State: <input type="text"/>	Zip +4: <input type="text"/>	<input type="text"/>
E-mail: <input type="text"/>		Phone: <input type="text"/>	

➤ Purchase Order Address (only if different from the Remittance Address):

Address: <input type="text"/>		Country: <input type="text"/>	
City: <input type="text"/>	State: <input type="text"/>	Zip +4: <input type="text"/>	<input type="text"/>
E-mail: <input type="text"/>		Phone: <input type="text"/>	

➤ Required documentation for vendor registration or address modification:

- Copy of W9 (US Vendor) / W8 (Foreign Vendor) form.
- Business Classification form.

Description of goods or services to be provided:

If non-US vendor, please indicate if services will be on US soil: Yes ☐ No ☐

Bank details: Bank detail updates must be processed through Minfo. Once a vendor # has been assigned, an email will be delivered with complete details.

Date and signature:

Signature must be in ink or submitted with electronic signature

Printed Name:

For electronic deposits, it is the Supplier's responsibility to provide proof of ownership and accuracy of the bank account details. Avangrid must be notified of any changes to bank account data. Notification may be made through a secure communication channel implemented for that purpose by Avangrid. The communication must be made in accordance with the provisions of the General Terms and Conditions or by any other means expressly agreed between the parties. The communication must attach the proof of ownership of the bank account subject to modification. Avangrid and its affiliates may withhold the corresponding payment, without incurring any liability for this reason, until the Supplier proves the ownership of the bank account.

(1) I consent to receive messages to the email account provided or that I may provide to Avangrid or its affiliates for two-factor authentication and/or other security verification purposes as described below in the Corporate Privacy Policy.

Level of confidentiality: **Public**



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Appendix I – ACH Authorization Form



ACH Authorization Form (US banks only)

Attention Valued Supplier,

ACH reduces time and resources required in handling checks resulting in the reduction of payment issues related to lost, stolen or misdirected checks. AVANGRID uses Automated Clearing House/Electronic Funds Transfer (CTX) Authorization

Please use the form below and AVANGRID will update their system to pay directly to your financial institution.

For secure account verification voided check is required or a signed bank or company letterhead

Vendor/Supplier number: Last 4 digits of Tax ID Number:

Vendor Name:

Mailing Address:

City: State: Zip:

Bank Name: Bank City/State:

Type of Account (check one): Savings: ☐ Checking ☐

ABA Routing Number: Account Number:

Email address to email ACH payment advice:

Note: all ACH payment advices will be sent via email. A paper remittance will not be mailed.

This form will authorize all payments to be automatically deposited into the banking institution designated. My signature below indicates I have verified and confirmed that all of the above information provided is correct.

Signature

Date:

Print name

Requirements of the Voided Check:

Level of confidentiality: **Public**



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The voided check must meet the following requirements to be accepted by the Company.

- “Void” must be printed across the check
- The name on the voided check must match the Vendor Name on the ACH form.
- The bank routing and account number must match the ACH form.
- Blank check attachments or deposit slips will not be accepted in lieu of a voided check.

Requirements of the Bank Letter:

The bank letter must meet the following requirements to be considered complete. Incomplete bank letters will not be accepted by the Company.

- Must be on the bank’s letterhead.
- Must include the name of the name of the payee (the name of the bank account holder) and must match the Vendor Name on the ACH form.
- Must include the payee’s routing and bank account number and must match the ACH form.
- Must be signed and dated by the officer of the bank.

Requirements of the Vendor (CDG Host) Letter:

The Vendor letter must meet the following requirements to be considered complete. Incomplete bank letters will not be accepted by the Company.

- Must be on the Vendor’s letterhead.
- Must include the name of the name of the payee (the name of the bank account holder) and must match the Vendor Name on the ACH form.
- Must include the Bank Name.
- Must include the payee’s routing and bank account number and must match the ACH form.
- Must be signed and dated by the officer of the Vendor.



Community Distributed Generation (CDG)

Solar credit with separate subscription fee

Community Distributed Generation (CDG), allows an electricity generation facility, like a solar farm, to share the benefits of clean energy production with participants. When participating in CDG, you will receive a portion of the value of the project's generation each time your project is billed. Your designated portion, referred to as an allocation, is based on your agreement with the project.


How does my billing work?

When you participate in CDG, you will receive CDG credits on your NYSEG bill. The amount of your credit will be determined by comparing your available allocations to your billed electricity charges. Your credit can never exceed your total billed electricity charges, so your credit will equal your available allocations up to the amount of your billed electricity charges. Any allocations above your billed electricity charges will be “banked” and available to be applied on future invoices. You will receive a separate bill from your solar company for subscription or administrative fees for your CDG participation. To determine your savings, you can compare your solar company bill to your CDG credits on your NYSEG bill.

What will I see on my bill?

We've made changes to our bills to make it easier to understand the components of your CDG credits. Look at what you can expect below.

Account Summary detail with your solar credit

**NYSEG**

Service Address: 456 MAIN ST, ANYTOWN, NY 12345

Next Scheduled Read Date: On or about June 01, 2024

Account Number: 1000-0000-000

Statement Date: March 28, 2024

Amount Due: 0.00

Page 1 of 6

EBPP

Account Summary

Previous Invoice	\$70.94
Payments received as of 03/28/24	-70.94
Balance forward	\$0.00
Energy charges	74.07
Miscellaneous charges	0.89
SOLAR CO CDG credit	-74.96
Payment due upon receipt	0.00

Residential

See details beginning on page 3

See messages on page 2

To avoid a 1.5% late payment charge, please ensure payment is received by the date displayed below.

CDG credit under Account Summary details your solar credit amount applied to your bill.

Your Account Summary will continue to provide an overview of charges and credits for your billing period, with a new line item for your CDG credit amount from participating in a CDG project. This amount varies from month to month.

Your CDG credit is applied to your overall balance for the month and you'll continue to see your total balance due under the Account Summary. If you're enrolled in Budget Billing or purchase your electricity supply from an Energy Services Company (ESCO) that includes their charges on our bill, your CDG credit will be applied toward all charges for your balance due.




Summary page includes details about your CDG participation

Here are some highlights of what you'll see on your monthly bill including your solar bank and credit from your solar company.

Your solar company's contact information for any billing questions.

CDG Customer credit is the same credit you'll find under your Account Summary.

Your previous bank is the dollar value of your allocations carried forward from your prior NYSEG bill.



JANE DOE

Account Number: 1005-0000-000

Statement Date: March 28, 2024

Service Address: 456 MAIN ST, ANYTOWN, NY 12345

Page 6 of 6

SOLAR CO
123 MAIN RD
ANYTOWN NY 12345

example.com

Please call 000.000.0000 with questions concerning your bill.

Messages

CDG Summary

03/17/24	CDG Previous bank	18.17
03/17/24	CDG Monthly allocation from host	108.71
03/28/24	CDG Customer credit applied to this invoice	-74.96
CDG Bank Balance		51.92

Your CDG credit will never exceed your billed electricity charges. When your allocation from your solar company exceeds your billed electricity charges the excess allocation will be held in your bank. Your allocation will vary throughout the year based on the value of your solar company's generation and your portion for that month.

Here are some additional descriptions you may see on your bill and what they mean.

- **CDG Previous bank:** This is your available dollar value of CDG allocations as of your last invoice. Allocations are "banked" when the allocation from your solar company exceeds your billed electricity charges.
- **CDG Monthly allocation from host:** This amount will change monthly based on the electricity generated and is the dollar amount for your portion of the solar project's generation that month.
- **CDG bank balance:** Your bank amount after this invoice reflects any adjustments to your available allocations during this billing period.
- **Sales tax:** If your electricity charges are assessed sales tax (based on your service location), you will see a sales tax credit applied to reflect the reduced sales tax collection on your electricity charges from your CDG credit.
- **CDG Customer credit reversed:** If a billing adjustment is needed, you may see your adjustments for a correction reflected as a separate line item detailing that adjustment.

We're committed to our clean energy future and hope these changes make it easier for you to understand how your participation in our clean energy future makes a difference each month on your bill and for New York.



Community Distributed Generation (CDG)

Net credit billing

Community Distributed Generation (CDG), allows an electricity generation facility, like a solar farm, to share the benefits of clean energy production with participants. When participating in CDG, you will receive a portion of the value of the project's generation each time your project is billed. Your designated portion, referred to as an allocation, is based on your agreement with the project.


How does net credit billing work?

The project you participate in splits your allocation into two pieces - a credit on your RG&E electricity bill, referred to as a "net credit", and a subscription fee to cover costs for participating in CDG. RG&E pays the subscription fee to the project on your behalf.

What will I see on my bill?

We've made changes to our bills to make it easier to understand the components of your CDG net credit bills. Look at what you can expect below.

Account Summary detail with your solar credit



JOHN DOE

Account Number: 2000-0000-000

Statement Date: May 16, 2024

Amount Due: \$241.14

Service Address: 123 MAIN ST, ANYTOWN, NY 12345

Next Scheduled Read Date: On or about May 26, 2024

Account Summary

Previous invoice	\$171.60
Payments received as of 05/16/24	-171.60
Balance forward	0.00
Energy charges	252.84
Miscellaneous charges	0.99
SOLAR CO CDG net credit	-12.69
Payment due upon receipt	\$241.14

To avoid a 1.5% late payment charge, please ensure payment is received by the date displayed below.

Page 1 of 6

EBPP

Residential

See details beginning on page 3

See messages on page 2

CDG net credit under Account Summary details your net credit amount applied to your bill.

Your Account Summary will continue to provide an overview of charges and credits for your billing period, with a new line item for your net credit amount from participating in a CDG project. This amount varies from month to month.

Your CDG net credit is applied to your overall balance for the month and you'll continue to see your total balance due under the Account Summary. If you're enrolled in Budget Billing or purchase your electricity supply from an Energy Services Company (ESCO) that includes their charges on our bill, your CDG net credit will be applied toward all charges for your balance due.



Summary page includes details about your CDG participation

Here are some highlights of what you'll see on your monthly bill including your solar bank, subscription fee and net credits from your solar company.

Your solar company's contact information for any billing questions.

The subscription fee is the cost for you to participate in CDG. RG&E pays the subscription fee to the project on your behalf.

The savings rate is used to calculate your "net credit amount".

Net credit is the same net credit you'll find under your Account Summary.

RG&E

Account Number: 2000-0000-000
Statement Date: May 16, 2024

Service Address: 123 MAIN ST, ANYTOWN, NY 12345
Page 6 of 6

SOLAR CO
987 MAIN RD
ANYTOWN, NY 12345

example.com

Please call 000.000.0000 with questions concerning your bill

CDG Customer Saving Rate: 5.000

Messages
Thank you for your participation.

CDG Summary

05/03/24	CDG Previous bank	129.42
05/03/24	CDG Monthly allocation from host	203.26
05/16/24	CDG Subscription fee applied to this invoice	-241.14
05/16/24	CDG Customer net credit applied to this invoice	-12.69
CDG Bank Balance		78.85

Your savings rate will always be at least 5% and is determined through your agreement with your solar company. Your net credit plus your subscription fee applied can never exceed your total billed electricity charges or your electricity budget amount. Your subscription fee and net credit are subtracted from your available allocations. Any remaining amount will be "banked" for crediting on your next invoice.

Here are some additional descriptions you may see on your bill and what they mean.

- **Messages:** This is where you'll find important information and messages from your solar company.
- **CDG Previous bank:** This is your available dollar value of CDG allocations as of your last invoice. Allocations are "banked" when the allocation from your solar company exceeds your billed electricity charges.
- **CDG Monthly allocation from host:** This amount will change monthly based on the electricity generated and is the dollar amount for your portion of the solar project's generation that month.
- **CDG bank balance:** Your bank amount after this invoice reflects any adjustments to your available allocations during this billing period.
- **Sales tax:** If your electricity charges are assessed sales tax (based on your service location), you will see a sales tax credit applied to reflect the reduced sales tax collection on your electricity charges from your CDG credit.
- **CDG Subscription fee reversed/CDG Customer net credit reversed:** If a billing adjustment is needed, you may see your adjustments for a correction reflected as a separate line item detailing that adjustment.

We're committed to our clean energy future and hope these changes make it easier for you to understand how your participation in our clean energy future makes a difference each month on your bill and for New York.

Level of confidentiality: **Public**



Take care of the environment.
Printed in black and white and only if necessary.