

Schedule Z – Additional Information Required for Net Metering Service

Please fill out the form completely (and initial the bottom of each page).

Host Customer Name: _____ Telephone: _____

Address of Facility: _____

Billing Account Number: _____

Meter Number: _____ Application ID Number: _____

The Host Customer is a (check any that apply): ☐ Municipality ☐ Other Governmental Entity

If so, submit certification provided by the DPU when obtained. Public Classification ID: _____

- A) Is the Host Customer applying for net metering service an electric company, generation company, aggregator, supplier, energy marketer, or energy broker, as those terms are used in M.G.L. c. 164, §§ 1 and 1F and 220 C.M.R. §11.00? ☐ No ☐ Yes (you are not eligible for net metering service)

NOTE: Definitions are:

“Electric company” means a corporation organized under the laws of the commonwealth for the purpose of making by means of water power, steam power or otherwise and for selling, transmitting, distributing, transmitting and selling, or distributing and selling, electricity within the commonwealth, or authorized by special act so to do, even though subsequently authorized to make or sell gas; provided, however, that electric company shall not mean an alternative energy producer; provided further, that a distribution company shall not include an entity which owns or operates a plant or equipment used to produce electricity, steam and chilled water, or an affiliate engaged solely in the provision of such electricity, steam and chilled water, where the electricity produced by such entity or its affiliate is primarily for the benefit of hospitals and nonprofit educational institutions, and where such plant or equipment was in operation before January 1, 1986; and provided further, that electric company shall not mean a corporation only transmitting and selling, or only transmitting, electricity unless such corporation is affiliated with an electric company organized under the laws of the commonwealth for the purpose of distributing and selling, or distributing only, electricity within the commonwealth. G.L. c. 164, § 1.

“Generation company” means a company engaged in the business of producing, manufacturing or generating electricity or related services or products, including but not limited to, renewable energy generation attributes for retail sale to the public. G.L. c. 164, § 1.

“Aggregator” means an entity which groups together electricity Customers for retail sale purposes, except for public entities, quasi-public entities or authorities, or subsidiary organizations thereof, established under the laws of the commonwealth. G.L. c. 164, § 1.

“Supplier” means any supplier of generation service to retail Customers, including power marketers, brokers and marketing affiliates of distribution companies, except that no electric company shall be considered a supplier. G.L. c. 164, § 1.

For the terms “energy marketer” and “energy broker,” please use the definition for “Electricity Broker,” which means an entity, including but not limited to an Aggregator, which facilitates or otherwise arranges for the purchase and sale of electricity and related services to Retail Customers, but does not sell electricity. Public Aggregators shall not be considered Electricity Brokers. 220 C.M.R. 11.02.

Schedule Z – Additional Information Required for Net Metering Service

B) If applying for Net Metering as an Agricultural Net Metering Facility, please answer the following questions:

- 1) Is the Agricultural Net Metering Facility operated as part of an agricultural business?
☐ Yes ☐ No (the facility is not eligible for Net Metering as an Agricultural Net Metering Facility)
- 2) Has the Commissioner of the Department of Agriculture recognized the business as an agricultural business?
☐ Yes ☐ No
- 3) Is the Agricultural Net Metering Facility located on land owned or controlled by the agricultural business mentioned in Item B.1 above?
☐ Yes ☐ No (the facility is not eligible for Net Metering as an Agricultural Net Metering Facility)
- 4) Is the energy from the Agricultural Net Metering Facility used to provide electricity to metered accounts of the agricultural business mentioned in Item B.1 above?
☐ Yes ☐ No (the facility is not eligible for Net Metering as an Agricultural Net Metering Facility)

C) If applying for neighborhood net metering, please answer the following questions:

- 1) Are all participants served by the same distribution company? ☐ Yes ☐ No
- 2) Are all participants served by the same ISO-NE load zone? ☐ Yes ☐ No
- 3) Do all participants reside in the same municipality? ☐ Yes ☐ No

NOTE: If any of the answers to the questions in Item C are no, then the facility is ineligible for neighborhood net metering unless granted an exception by the Department of Public Utilities under 220 C.M.R. §18.09(6).

D) Please indicate how the Host Customer will report to the Company the amount of electricity generated by the net metering facility. The information is due twice each year: (1) by January 31 for the prior year's generation; (2) by September 30 for the year-to-date generation:

- ☐ Provide the Company access to their ISO-NE GIS account
- ☐ Provide the Company access to their metering or inverter data
- ☐ Provide the Company with a report in writing of the generation by January 31 and again on September 30 each year

E) For any Billing Period in which the Host Customer earns Net Metering Credits, please indicate how the Distribution Company will apply them:

- ☐ Apply all of the Net Metering Credits to the account of the Host Customer (Skip Items F and G)
- ☐ Allocate all the Net Metering Credits to the accounts of eligible Customers (Class I and II Net Metering Facilities skip Item F)
- ☐ Both apply a portion of the Net Metering Credits to the Host Customer's account and allocate a portion to the accounts of eligible Customers (Class I and II Net Metering Facilities skip Item F)

F) If the Host Customer has a Class III Net Metering Facility, please indicate below the range that best represents the number of eligible Customer accounts to which Net Metering Credits would be allocated. Alternatively, please complete Item G. This information will allow the Company to exercise its option to purchase Net Metering Credits from the Host Customer rather than allocating such credits.

The Company will notify the Host Customer within 30 days of the filing of Schedule Z whether it will allocate or purchase Net Metering Credits. If the Company elects to purchase Net Metering Credits, the Company will render payment by issuing a check to the Host Customer each Billing Period, unless otherwise agreed in writing by the Host Customer and Company. If the Company elects to allocate Net Metering Credits, the Host Customer must complete Item G and submit the revised Schedule Z to the Company.

- ☐ Allocate Net Metering Credits to fewer than 50 eligible Customer accounts (Skip Item G)
- ☐ Allocate Net Metering Credits to 100 or fewer eligible Customer accounts (Skip Item G)
- ☐ Allocate Net Metering Credits to more than 100 eligible Customer accounts (Skip Item G)

G) Please state the total percentage of Net Metering Credits to be allocated.

_____% Amount of the Net Metering Credit being allocated. The total amount of Net Metering Credits being allocated shall not exceed 100 %. Any remaining percentage will be applied to the Host Customer's account.

Schedule Z – Additional Information Required for Net Metering Service

Please identify each eligible Customer account to which the Host Customer is allocating Net Metering Credits by providing the following information (attach additional pages as needed):

NOTE: If a designated Customer account closes, the allocated percentage will revert to the Host Customer's account, unless otherwise mutually agreed in writing by the Host Customer and the Company.

Customer Name: _____
Service Address: _____
Billing Account Number: _____
If public entity, DPU Public Classification ID: _____
Amount of Net Metering Credit Allocated: _____ %

Customer Name: _____
Service Address: _____
Billing Account Number: _____
If public entity, DPU Public Classification ID: _____
Amount of Net Metering Credit Allocated: _____ %

Customer Name: _____
Service Address: _____
Billing Account Number: _____
If public entity, DPU Public Classification ID: _____
Amount of Net Metering Credit Allocated: _____ %

Customer Name: _____
Service Address: _____
Billing Account Number: _____
If public entity, DPU Public Classification ID: _____
Amount of Net Metering Credit Allocated: _____ %

Customer Name: _____
Service Address: _____
Billing Account Number: _____
If public entity, DPU Public Classification ID: _____
Amount of Net Metering Credit Allocated: _____ %

Customer Name: _____
Service Address: _____
Billing Account Number: _____
If public entity, DPU Public Classification ID: _____
Amount of Net Metering Credit Allocated: _____ %

Total Net Metering Credit allocation on this page: 0% (automatic calculation)
(If this is an additional page attached to the Schedule Z, indicate: Additional Page ____ of ____)

Schedule Z – Additional Information Required for Net Metering Service

- H) The Company may elect to seek to obtain capacity payments from ISO-NE for the electricity generated by Class II and III Net Metering Facilities. The Company will notify the Host Customer within 30 days of the filing of Schedule Z whether it will assert title to the right to seek those capacity payments. If the Company elects to assert title to those capacity payments, the Company will include any capacity payments received from ISO-NE in the Company's annual Net Metering Recovery Surcharge reconciliation.
- I) The terms of this Schedule Z shall remain in effect unless and until the Host Customer executes a revised Schedule Z and submits it to the Company. Unless otherwise required herein or mutually agreed to in writing by the Host Customer and the Company, a revised Schedule Z shall not be submitted more than twice in any given calendar year.
- J) A signature on the application shall constitute certification that (1) the Host Customer has read the application and knows its contents; (2) the contents are true as stated, to the best knowledge and belief of the Host Customer; and (3) the Host Customer possesses full power and authority to sign the application.

Host Customer (Signature)

Host Customer (Print)

Date