

## **CDG Host Allocation Review and Approval: Guidance Document**

This Guidance Document, developed by the CDG Billing and Crediting Working Group, lays out consensus-based timelines for CDG Host Allocation Review and Approval for an initial host allocation (“New CDG Project”) and modification to an already approved host allocation (“Current CDG Project”).

### **For New CDG Project(s) (Initial Allocation Form):**

**Initial Allocation Forms must be submitted a minimum of 60 days prior to commencing net metering service. Current practice in some investor owned utility (IOU) service territories is to reject the entire Allocation Form if any listed subscriber allocation is incorrect. CDG Host Sponsors and IOUs agree that this should not be the practice moving forward. Instead, IOUs should move ahead with the full Allocation Form minus the rejected allocation. Further, Sponsors and IOUs agree that changes to the Allocation Form may be made within this 60-day period and shall follow the outline below:**

1. Within 2 business days of CDG Host Sponsor submitting an allocation form, the IOU will confirm receipt of the submission. The CDG Host Sponsor email shall clearly state their preferred path should any subscriber accounts be rejected.
2. Within 5 business days (inclusive of the 2 business days above), the IOU will review and return the Allocation Form with either:
  - a. An approval of the full list;
  - b. Identification of all subscriber allocations that are rejected and the reason (i.e. wrong account number, wrong name, etc.) along with list of all accepted subscriber allocations.
3. Within 5 business days of receiving Allocation Form with rejected allocations, the CDG Host Sponsor shall:
  - a. Resubmit corrected Allocation Form to the IOU;
  - b. Confirm that submitted Allocation Form should be used, minus the rejected subscriber account(s).
4. Within 2 business days after receiving an updated Allocation Form or after the 5 business days the host has to respond to the IOU, the IOU shall complete its final review and confirm acceptance of the Allocation Form with any remaining rejected subscribers removed, unless Host email specifically states otherwise.
5. The IOU may stop accepting revised allocation forms 30 business days before the CDG Host Account Billing Date and move forward the last submitted Allocation Form with the rejected subscribers removed as outlined in the developer’s email.

The above framework is in no way meant to prevent more timely reviews by the utilities and/or the CDG Host Sponsors.

**For Current CDG Project(s) (Changes to Initial Allocation Form):**

**Changes to an initial Allocation Form must be submitted a minimum of 15 business days prior to the 30 days (total 45 days) before the CDG Host Account Billing Date to make the appropriate modifications. CDG Host Sponsors and IOUS shall follow the outline below:**

1. Within 2 business days of CDG Host Sponsor submitting an Allocation Form the IOU will confirm receipt of the submission. The CDG Host Sponsor email shall clearly state their preferred path should any subscriber accounts be rejected.
2. Within 5 business days (inclusive of the 2 business days above), the IOU will review and return the Allocation Form with either:
  - a. An approval of the full list;
  - b. Identification of all subscriber allocations that are rejected and the reason (i.e. wrong account number, wrong name, etc.) along with list of all accepted subscriber allocations.
3. Within 5 business days of receiving Allocation Form with rejected allocations, the CDG Host Sponsor shall:
  - a. Resubmit corrected Allocation Form to the IOU;
  - b. Confirm that submitted Allocation Form should be used, minus the rejected subscriber account(s).
6. Within 2 business days after receiving an updated Allocation Form or after the 5 business days the host has to respond to the IOU, the IOU shall complete its final review and confirm acceptance of the Allocation Form with any remaining rejected subscribers removed, unless Host email specifically states otherwise.
4. When communicating the acceptance of the finalized Allocation Form the utility will specify the first host generation period for which the new list will be applied.

The above framework is in no way meant to prevent more timely reviews by the utilities and/or the CDG Hosts.