

ATTACHMENT D

**INSTRUCTIONS FOR SELF-CERTIFICATION FORM
STATUTORY EXCEPTION(S)
NET METERING FACILITIES ON A SINGLE PARCEL**

COMMONWEALTH OF MASSACHUSETTS
DEPARTMENT OF PUBLIC UTILITIES

GENERAL INSTRUCTIONS

PURPOSE OF FORM

This Form allows Host Customers to apply for a Statutory Exception to the Single Parcel Rule to receive Net Metering services. The Form is part of a self-certification process. The five Statutory Exceptions are set forth in Section 55 of An Act Driving Clean Energy and Offshore Wind, St. 2022, c. 179 ("2022 Clean Energy Act"); G.L. c. 164, § 139(A).

DO YOU QUALIFY

Any Host Customer seeking a Statutory Exception or Exceptions must file this Form with the Reviewer. Under the statute, a Class I, Class II, or Class III Solar Net Metering Facility shall be eligible to, or shall continue to, receive Net Metering Credits as otherwise provided by law if the facility is on the same parcel as any number of other such Solar Net Metering Facilities and is eligible for one or more of the following exceptions:

1. **Government-Owned Parcel:** The Net Metering facilities are placed on a government-owned parcel; provided, however, that all facilities on the single parcel do not exceed an aggregate limit of ten megawatts;
(G.L. c. 164, § 139(A)(i))
2. **Low- or Moderate-Income Housing:** The Net Metering facilities are placed on a single parcel of land where all buildings on that parcel comprise low- or moderate-income housing as defined in M.G.L. c. 40B, § 20; provided, however, that all facilities on the single parcel do not exceed an aggregate limit of ten megawatts;
(G.L. c. 164, § 139(A)(ii))
3. **Separate and Distinct Rooftops:** Each Net Metering facility is placed on a separate and distinct rooftop where no two systems occupy the same rooftop; provided, however, that all facilities on the single parcel do not exceed an aggregate limit of two megawatts;
(G.L. c. 164, § 139(A)(iii))
4. **Separate Customers Under the Same Rooftop:** Each Net Metering facility installed on the same rooftop is interconnected behind a meter of a separate

customer; provided, however, that all the facilities on the single parcel do not exceed an aggregate limit of ten megawatts; or

(G.L. c. 164, § 139(1)(iv))

5. **Additional Facility Not Less Than One Year:** The additional Net Metering facilities are installed not less than one year after any previously installed facility was placed into service and received its authorization to interconnect from the Distribution Company; provided, however, that all facilities on the single parcel do not exceed an aggregate limit of two megawatts. If all net metering facilities located on a single parcel are net metering facilities of a municipality, the aggregate limit shall be ten megawatts per single parcel. **(G.L. c. 164, § 139(1)(v))** (Note: this Statutory Exception may not be combined with any other Statutory Exception)

Multiple Statutory Exceptions may be granted to and be in effect at a given point of time for all Solar Net Metering Facilities on a parcel of land. If multiple Statutory Exceptions are granted, all Solar Net Metering Facilities must qualify for each Statutory Exception. If multiple Statutory Exceptions are granted, the aggregate capacity limit of the parcel will be set at the largest of the exceptions. If the Host Customer seeks to interconnect a new facility on a parcel, both the existing and proposed facilities must meet the criteria for the previously granted Statutory Exception(s) or any newly requested Statutory Exception(s), including but not limited to remaining under the relevant aggregate per parcel capacity limit. However, any parcel previously granted Statutory Exceptions 1 through 4 may not change its Statutory Exception type to Statutory Exception 5 (Additional Facility Not Less Than One Year).

WHAT YOU NEED TO PROCEED

To complete this Form, you will need all of the following information:

1. For the parcel of land on which the proposed Solar Net Metering Facilities will be located:
 - a. Information from the Registry of Deeds identifying the Book and Page Number for the recorded deed; and
 - b. Property and Location IDs from [Massachusetts Interactive Property Map](#).
2. Information for each existing and proposed Solar Net Metering Facility expecting to qualify for the Statutory Exception(s), such as the address and nameplate capacity in kilowatts alternating current ("kW-AC"). Please note that all existing and proposed Solar Metering Facilities on the parcel must meet the criteria for the newly requested Statutory Exception(s), including but not limited to remaining

under the relevant aggregate per parcel capacity limit. You may submit the Form without capacity information on existing facilities if, despite reasonable efforts, you cannot obtain such information and your parcel is under a certain size. Additional details are available in Part 6 of this Form.

3. A copy of the interconnection service agreement (“ISA”) or conditional approval.
4. If applying for Statutory Exception 1, the Department of Public Utilities’ (“Department”) Public ID number for the parcel owner to demonstrate its eligibility.
5. Contact information for the Host Customer and the Solar Net Metering Facility Owner.
6. The Host Customer’s account number with the Distribution Company.
7. Filing Fee.

DEPARTMENT OVERSIGHT OF THE FORM

Where a question or concern is brought to light regarding the accuracy or veracity of the information provided on or with this Form that could impact the Host Customer’s eligibility for the requested Statutory Exception(s), the Department may take steps to verify the information.

**MASSACHUSETTS DEPARTMENT OF PUBLIC UTILITIES
SINGLE PARCEL RULE EXCEPTIONS
SELF-CERTIFICATION FORM**

FORM NUMBER _____

PART 1: **CONTACT INFORMATION**

1. Host Customer Name
2. Representative Contact Information (If different than the Host Customer)
 - a. Representative's Company or Organization Name / Trade Name
 - b. Representative's Relation to Host Customer
3. Street Address
4. City
5. State
6. Zip Code
7. Telephone Number
8. Email Address

PART 2: **APPLYING SOLAR NET METERING FACILITY INFORMATION**

1. Are all the Facilities on the parcel of land Solar Net Metering Facilities? (Y/N)
YES – Continue
NO – Exception is Not Available
2. Site Name (If Applicable)
3. Applying Solar Net Metering Facility Name (If Applicable)
4. [Add an additional Applying Solar Net Metering Facility Name]

PART 3:**PARCEL INFORMATION**

1. Name of Landowner
2. Registry of Deeds Book and Page Number
3. Property ID (available via [Massachusetts Interactive Property Map](#))
4. Location ID (available via [Massachusetts Interactive Property Map](#))
5. Parcel Acreage

PART 4:**STATUTORY EXCEPTION(S)**

CHECK ALL EXCEPTIONS FOR WHICH YOU ARE ELIGIBLE. STATUTORY EXCEPTION 5 MAY NOT BE COMBINED WITH ANY OTHER STATUTORY EXCEPTION.

1. Government-Owned Parcel (G.L. c. 164, § 139(1)(i))

The Solar Net Metering facilities are placed on a government-owned parcel; provided, however, that all facilities on the single parcel do not exceed an aggregate limit of ten megawatts ("MW") AC.

2. Low- or Moderate-Income Housing (G.L. c. 164, § 139(1)(ii))

The Solar Net Metering facilities are placed on a single parcel of land where all buildings on that parcel comprise low- or moderate-income housing as defined in G.L. c. 40B, § 20; provided, however, that all facilities on a single parcel do not exceed an aggregate limit of ten MW AC.

3. Separate and Distinct Rooftops (G.L. c. 164, § 139(1)(iii))

Each Solar Net Metering facility is placed on a separate and distinct rooftop where no two systems occupy the same rooftop; provided, however, that all facilities on the single parcel do not exceed an aggregate limit of two MW AC.

4. Separate Customers Under the Same Rooftop (G.L. c. 164, § 139(1)(iv))

Each Solar Net Metering facility installed on the same rooftop is interconnected behind a meter of a separate customer; provided, however, that all facilities on the single parcel do not exceed an aggregate limit of ten MW AC.

5. Additional Facility Not Less Than One Year (G.L. c. 164, § 139(l)(v))

The additional Solar Net Metering facilities are installed not less than one year after any previously installed facility was placed into service and received its authorization to interconnect from the Distribution Company; provided, however, that all facilities on the single parcel do not exceed an aggregate limit of two MW AC. (Note: If previously installed Net Metering facilities on the parcel are operating pursuant to Statutory Exceptions 1 through 4, Statutory Exception 5 is not available.)

PART 5:

INFORMATION FOR STATUTORY EXCEPTION(S) IDENTIFIED

ANSWER THE QUESTIONS/PROVIDE THE INFORMATION FOR THE EXCEPTION(S) THAT YOU HAVE CHECKED

1. Government-Owned Parcel Exception

a. Is the parcel owner a municipality or other governmental entity? (Y/N)

If YES:

b. Does the parcel owner have a Public ID number? (Y/N)

If YES:

Provide the Department’s Public ID Number

If NO to “b” – Exception Is Not Available

Information on how to obtain a Public ID Number is available here:
<https://www.mass.gov/how-to/apply-for-a-net-metering-public-id-number>

2. Low- or Moderate-Income Housing Exception

a. Are all buildings on the parcel consistent with the definition of low- or moderate-income housing as defined in G.L. c. 40B, § 20 (“any housing subsidized by federal or state government under any program to assist the construction of low- or moderate-income housing as defined in the applicable federal or state statute, whether build or operated by any public agency or any nonprofit or limited dividend organization”)

YES – Continue

NO – Exception is Not Available

b. Are all the buildings on the parcel of land built or operated by a Public Housing Authority, private entity, or both?

(1) Public Housing Authority

(2) Private Entity

(3) Both

c. Public Housing Authority

(1) Provide the name of the Public Housing Authority

(2) Provide the Department's Public ID Number

d. Private Entity

(1) Name of the non-profit organization, limited dividend organization, or other private entity that builds or operates the low-or-moderate income housing.

(2) If a private entity, documentation is necessary to demonstrate eligibility that:

(a) At least 25% of the housing available at the properties to be served by the facility on the parcel is required to be rented to households that are at or below 80% of the area median income ("AMI"); or

(b) At least 20% of the housing available at the properties to be served by the facility on the parcel is required to be rented to households that are at or below 50% of the AMI.

This demonstration can be made by providing copies of one or more of the following documents:

(1) Regulatory agreement (memorializes affordability restrictions between owner and state or federal agency);

(2) Deed restriction;

(3) Affordable housing restriction that lists the number of restricted units, level income applicable to restricted units, and term of agreement;

(4) Housing Assistance Payments ("HAP") contract, which documents Section 8 provisions or state vouchers;

(5) Rent roll/income report that shows actual annual income of existing residents;

- (6) Utility program affordability restriction;
- (7) Evidence documenting the housing development's listing on or eligibility for the municipality's Subsidized Housing Inventory
- (8) Tax credit regulatory agreement and declaration of restrictive covenants; or
- (9) Other relevant documentation not listed.

3. Separate and Distinct Rooftops Exception

- a. Is there a ground-mounted Solar Net Metering Facility located on the parcel of land (Y/N)?
 - a. **Yes – Exception is Not Available**
 - b. No – Continue

- b. Is the proposed Solar Net Metering Facility(ies) located on a rooftop? A rooftop shall mean an off-ground structure capable of supporting a Net Metering facility, including buildings, garages, carports, and canopies. A rooftop facility must be (i) tied behind the electrical service of the structure on which it is located; or (ii) installed as a solar canopy over a parking area. Mounting and racking equipment, such as a pole mounted facility does not qualify as a rooftop facility. (Y/N)

YES – Continue

NO – Exception is Not Available

- c. Is the proposed Solar Net Metering Facility(ies) located on a building physically separate (not touching) from any other buildings with a Solar Net Metering Facility (Y/N)

YES – Continue

NO – Exception is Not Available

4. Separate Customers Under the Same Rooftop Exception

Statutory Exception 4 (Separate Customers Under the Same Rooftop) can apply to add multiple rooftops per parcel, provided there is at least one rooftop that has at least two Host Customers. All customers under a single rooftop must be unique Host Customers.

Additional rooftops can have one or more facility, provided that under every rooftop the customers are separate Host Customers.

- a. Is there a ground- mounted Solar Net Metering Facility located on the parcel of land (Y/N)?

Yes – Exception is Not Available

No – Continue

- b. Is each Solar Net Metering Facility, both existing and proposed, on the same rooftop (1) installed behind the meter (i.e. offsets onsite load); and (2) a separate Host Customer (Y/N)

YES – Continue

NO – Exception is Not Available

5. Additional Facility Not Less Than One Year Exception

- a. Are there Solar Net Metering facilities on the parcel of land operating pursuant to granted Statutory Exception 1, 2, 3, or 4?

YES – Exception is Not Available

NO – Continue

- b. What date did the last Solar Net Metering facility on the parcel of land receive its authorization to interconnect from the Distribution Company?

The date entered is one or more years prior than today's date –
Continue

**The date entered is less than one year prior to today's date –
Exception is Not Available**

- c. Is the Host Customer of all the Solar Net Metering Facilities on the parcel of land a municipality or an other governmental entity? (Y/N)

YES – Continue - Maximum aggregate capacity allowed on parcel is ten MW

NO – Continue - Maximum aggregate capacity allowed on parcel allowed is two MW

If YES:

- (1) Provide the name of municipality or other governmental entity
- (2) Provide the municipality or other governmental entity's Department Public ID Number

6. Capacity of Proposed And Existing Solar Facilities on Parcel

Table 1 requests capacity information regarding proposed and existing facilities on the parcel of land. This information is required unless the applicant is unable to obtain capacity information for one or more existing facility and if: (a) the parcel is smaller than ten acres and the aggregate parcel limit of the applicable Statutory Exception is two MW; or (b) the parcel is smaller than 50 acres and the aggregate parcel limit of the applicable Statutory Exception is ten MW. If an applicant avails themselves of this reporting exception, they must also submit documentation demonstrating that they undertook reasonable efforts to obtain the capacity information, but nonetheless could not.

- a. Complete the following Table 1 with information on the proposed and existing Solar Net Metering Facilities on the parcel.

Table 1

Host Customer Name +	Facility Name (if applicable)	Applying, Existing, or Other Proposed Facility	Facility Street Address	Nameplate Capacity (kW-AC) ** [include 3 decimals]	Host Customer Utility Account Number *	Distribution Company Interconnection Application Number *	If Applicable, Previously Granted Single Parcel Rule Exception		Authorization to Interconnect Date ^
							[Statutory, Blanket, or Petition]	Exception Application or Docket Number	

+ Required for all proposed and existing facilities applying for Statutory Exception 4 (Separate Customers Under the Same Rooftop). For all other Statutory Exceptions, required for all proposed facilities and all existing facilities for which the information is available.

** Enter for all proposed facilities and all existing facilities for which the information is available. If information for one or more existing facilities is unavailable, the application may proceed if the parcel is smaller than ten acres or 50 acres, depending on the aggregate parcel limit of the applicable Statutory Exception.

* For applying facilities only. If the account number is not known at time of application, mark as "Unknown."

^ Enter only for all existing facilities if applying for Statutory Exception 5.

b. Was capacity information provided for all the facilities?

Yes – Continue to question e, skip questions c and d below

NO – Provide the information in "c" and "d" below

c. Answer if applicable:

(i) If you are applying for Statutory Exception 1: is your parcel less than 50 acres? (Y/N)

a. YES - provide the information requested in question d.

b. NO - capacity information for all facilities in Table 1 is required.

(ii) If you are applying for Statutory Exception 2: is your parcel less than 50 acres? (Y/N)

a. YES - provide the information requested in question d.

b. NO - capacity information for all facilities in Table 1 is required.

(iii) If you are applying for Statutory Exception 3: is your parcel less than ten acres? (Y/N)

a. YES - provide the information requested in question d.

b. NO - capacity information for all facilities in Table 1 is required.

(iv) If you are applying for Statutory Exception 4: is your parcel less than 50 acres? (Y/N)

a. YES – provide the information requested in question d.

b. NO - capacity information for all facilities in Table 1 is required.

(v) If you are applying for Statutory Exception 5: is your (a) parcel less than ten acres; **OR** (b) parcel less than

50 acres AND the Host Customer is a Municipality or Other Governmental Entity? (Y/N)

- a. YES - provide the information requested in question d.
- b. NO - capacity information for all facilities in Table 1 is required.
- d. If there is missing capacity information for one or more Solar Net Metering Facilities, provide an explanation that, at a minimum, includes: (1) a description of the steps taken to obtain capacity information for the existing Solar Net Metering Facilities, and (2) an explanation for why the capacity could not be obtained.
- e. Please upload a copy of your executed interconnection service agreement ("ISA") or conditional approval to interconnect.

PART 6:

CERTIFICATION, ACKNOWLEDGMENTS, AND SIGNATURE

A. CERTIFICATION

I, the Host Customer, warrant that I am authorized to sign this Form. I hereby confirm that I have examined this Form, including accompanying documentation, and I certify, to the best of my knowledge and belief, that it is true, correct, and complete.

B. ACKNOWLEDGMENTS

I, the Host Customer, acknowledge the following.

1. **Additional Information:** I will provide additional information and any supporting documentation upon request by the Reviewer or the Massachusetts Department of Public Utilities ("Department").
2. **Public Information:** Certain information, such as the parcel location and the capacity, from the Form about my Solar Net Metering Facility may be displayed on a public-facing website.
3. **Solar Developer:** I have had a chance to ask questions and seek information of my solar developer in connection with the completion of this Form.
4. **Representative:** I understand that if a Representative completes and submits the Form, I have provided the Representative all of the information to accurately complete the Form. Furthermore, I understand that the Reviewer shall rely upon

the information provided by the Representative on the Form to determine my eligibility for the Statutory Exception(s).

5. **Parcel Eligibility:** I understand that if, in the future, a new Solar Net Metering Facility seeks interconnection on the parcel, both the existing and proposed facilities must meet the criteria for the previously granted Statutory Exception or any newly requested Statutory Exception, including but not limited to remaining under the relevant aggregate per parcel capacity limit. Further, any parcel previously granted Statutory Exceptions 1 through 4 may not later apply for Statutory Exception 5 (Additional Facility Not Less Than One Year).
6. **Notice Regarding Incorrect or Incomplete Information/Failing Comply With Law:** I understand that submitting incorrect or incomplete information on or with this Form or failing to comply with applicable laws, orders, rules, regulations, and tariffs may result in a denial or revocation of a Statutory Exception, revocation of a Net Metering Cap Allocation, or loss of a placement on the System of Assurance waiting list, and/or termination of Net Metering services.
7. **Regulatory Compliance:** I am responsible for complying with and being familiar with all federal, state, and municipal laws, ordinances, rules, and regulations, including zoning and building codes, applicable to Net Metering and the construction and operation of Solar Facilities.
8. **Notice Regarding Utility Account Number.** I understand that by submitting this Form, I consent to the Reviewer using my Utility Customer Account number for the sole purpose of confirming that the Net Metering Facility/Facilities listed on this Form have a separate Utility Customer Account.

C. SIGNATURE – HOST CUSTOMER MUST SIGN THIS FORM

BY SIGNING THIS FORM, THE HOST CUSTOMER EXPRESSLY CERTIFIES AND ACKNOWLEDGES AS SET FORTH ABOVE

Host Customer Sign Here

Host Customer Printed _____

Host Customer Title _____

Date _____

RELEVANT LINKS AND CONTACT INFORMATION

[Distribution Company Name]

Website: [Website URL] | Email: [Email address]

Department of Public Utilities

Website: www.mass.gov/net-metering

Attorney General's Office

Website: www.mass.gov/get-consumer-support

Massachusetts System of Assurance of Net Metering Eligibility

Website: www.massaca.org | Email: help@massaca.org