

TW1

AL2



# Portland Solar Access Program (PSAP)

## How Projects Get Done

Energy Trust of Oregon  
Funded by the Portland Clean Energy Fund PCEF  
Wednesday, May 20, 2026



## Slide 1

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**TW1** Need to add PCEF logo

Terri White, 2026-04-20T03:05:15.892

**AL2** Did we invite CBO's to the TA training? CBO's may benefit from listening in or just watching the recording later

Alina Lambert, 2026-05-15T14:32:39.267

**SW2 0** [@Terri White] Should we extend the invite to CBOs?

Shannon Wall, 2026-05-18T20:37:50.896

# How Projects Get Done (Part 1)

## Project Workflow

- From assignment to closeout
- Key stages

## Getting Started

- Lead assignment
- Project acceptance
- Initial customer contact

## Building The Project

- Site assessment
- Scope development
- Design review and Funds Reserved

## How Projects Get Done (Part 2)

### Installation and Closeout

- Installation process
- QA and verification
- Project closeout

### Your Responsibilities

- Communication with customers and partners
- Customer experience expectations
- Accountability

### Enabling Repairs

- What they are
- When they're required
- Your role in delivering them

# Getting Paid & Staying Compliant (Part 1)

## How You Get Paid

- Milestone payments (50% / 50%)
- Funds Reserved
- Final payment requirements

## Reporting Requirements

- Workforce reporting
- Monthly reporting
- Subcontractor reporting

# Getting Paid & Staying Compliant (Part 2)

## Staying in Good Standing

- Wage requirements (PCEF)
- Program expectations
- Communication requirements

## Systems and Documentation

- PowerClerk
- Required documentation
- Submissions and tracking

# Onboarding Updates

# CBO + TA Meet & Greet

## Who:

- CBOs
- TA Customer Facing Staff
- Program Team

## What:

- Icebreaker
- Lunch
- Game
- Implicit Bias Training

## When:

Wednesday, May 27  
8:30am – 1:00pm

## Where:

Tony Hopson Sr. Center for Self  
Enhancement  
3920 N Kerby Ave, Portland OR 97227

## Slide 7

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**NA1** Is the 'what' confirmed? [@Terri White]  
Nayan Alailima-Rose, 2026-05-11T22:05:01.592

# Virtual PSAP Trainings – Wednesdays at 8am-9am

## May 20th Agenda

- Getting Started
- Building the Project
- Installation and Closeout
- Your Responsibilities
- Enabling Repairs

**Attendance:** Project managers, project submissions, crew leads.

## ~~May 27th~~ June 3rd

- How You Get Paid
- Reporting Requirements
- Staying in Good Standing
- Systems and Documentation

**Attendance:** Project managers, project submissions, accounting, payroll, frequent subcontractors.

## Slide 8

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**SW1**    [@Terri White] What do you think of the attendance list for each training? Do you see any reason why install crew members will have to be at the May 27th training?

Shannon Wall, 2026-05-05T19:32:27.657

**TW1 0**   Looks good to me. Installers could attend if they're curious but not at all necessary.

Terri White, 2026-05-11T18:43:39.953

# Culture of Belonging Trainings – 9am-11am

SW1

**Attendance: All customer facing staff**

## **Trauma-Informed Awareness**

**Monday June 1st (In-Person)**

*Trauma-informed training teaches professionals how to recognize the effects of trauma in the people they serve and adjust their practices, so they don't unintentionally cause further harm.*

**Tony Hopson Sr. Center for Self Enhancement  
3920 N Kerby Ave, Portland OR 97227**

## **Micro-aggressions**

**Wednesday June 10th (In-Person)**

*Micro-aggressions training focuses on the understanding, identification, and addressing of micro-aggressions. These are brief and often unintended negative messages that convey powerful negative messages about specific groups of people. The training aims to help individuals recognize and respond to these messages, promoting inclusivity and preventing discrimination.*

**Energy Trust Office 10<sup>th</sup> Floor  
920 SW Sixth Ave Portland OR 97204**

## Slide 9

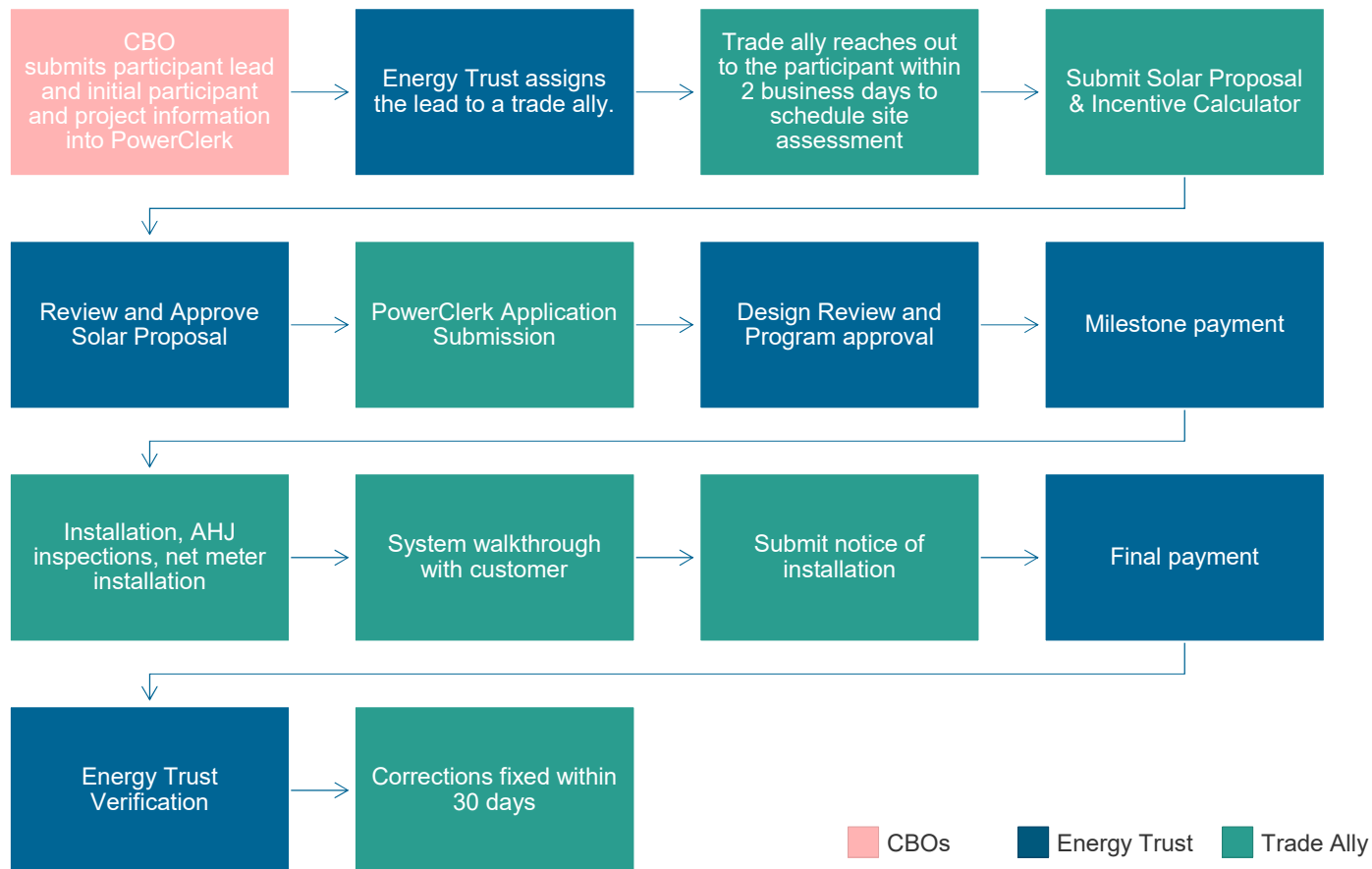
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**SW1**    [@Ernie Guerrero] What umbrella term for these trainings would you like to use? Diversity? DEI?  
Shannon Wall, 2026-05-05T19:34:53.175

**EG1 0**   Hi [@Shannon Wall], thanks for asking. This is important, as PCEF has moved away from DEI and race language.  
Give me a little minute and I'll get back to you.  
Ernie Guerrero, 2026-05-05T21:32:40.044

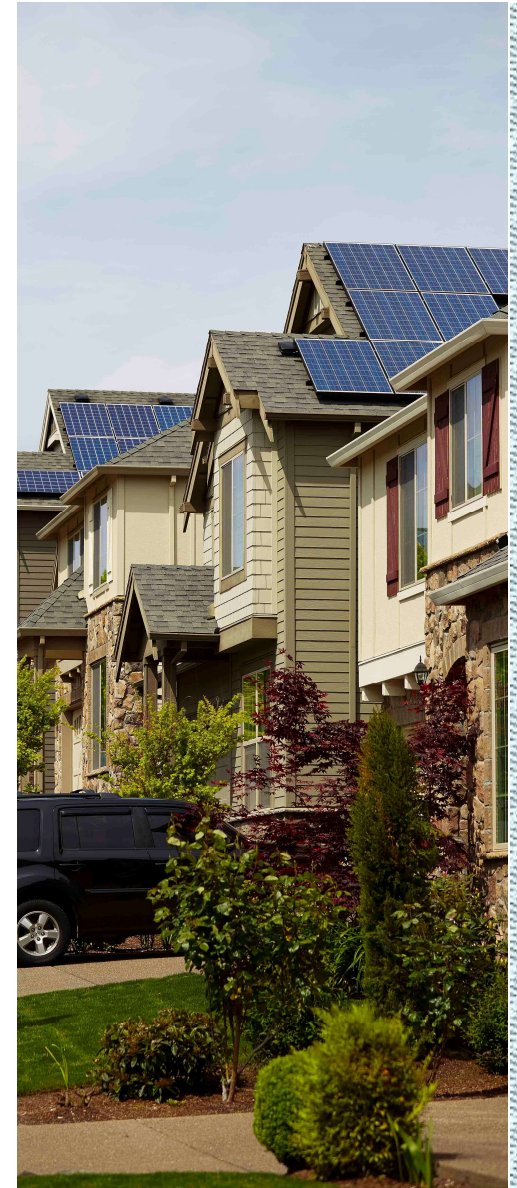
# Project Workflow

# Project Workflow



# Lead Assignment

- CBO conducts a pre-assessment.
  - Participant information and eligibility
  - High-level property review & eligibility
- CBO submits <sup>AL1</sup>lead and pre-assessment information into new PSAP Leads program in PowerClerk
- Energy Trust assigns lead to a trade ally
- Trade ally contacts the participant within **2 business days**
- Coordinate with the assigned <sup>AL2</sup>CBO as needed for participant communication



## Slide 12

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- AL1** For soft launch the CBO will be submitting the lead but later this summer there will be a way for the public to submit a lead using the interest form  
Alina Lambert, 2026-05-15T14:19:41.900
- SW1 0** I'll add that to the talking points. Thanks!  
Shannon Wall, 2026-05-18T16:34:19.459
- AL2** Wondering how involved CBO's want to be on the scheduling for home assessment, but this phrasing works in the meantime  
Alina Lambert, 2026-05-15T14:21:35.888
- SW2 0** Yeah, it would be nice to have a list of things TAs should keep CBOs updated on or involved in but that will probably come after we have a few projects completed.  
Shannon Wall, 2026-05-18T16:34:02.365

# Home Assessment & Proposal

- Conduct home assessment to confirm system feasibility and installation conditions
- Develop project scope, including solar, storage (if applicable), and enabling repair work
- Prepare project cost estimate using the Incentive Calculator
- Submit Proposal and Incentive Calculator to PowerClerk

AL1



## Slide 13

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**AL1** Should specify 'PSAP Leads' program since it's a new PowerClerk program for them

Alina Lambert, 2026-05-15T14:24:16.065

**SW1 0** Added to slide 7

Shannon Wall, 2026-05-18T16:47:46.427

## Qualifying questions or DNQ

If you have qualifying questions or site is ineligible input information in PSAP Leads Program in PowerClerk:

- Enabling repair approval
- Concerns about site eligibility
- System cost goes above maximum PSAP incentive
- Questions about equipment or system eligibility

Is this home a good candidate for PSAP incentives? \* ?

If you select 'yes' the project will move to Solar Proposal Complete status. 'No' will move the project to Home Assessment Review status. Select 'Maybe' if there are enabling repairs that require manual approval and the status will move to Home Assessment Review. Notes on next steps will be shared with the CBO. ✕

- Yes  
 No  
 Maybe

## Slide 14

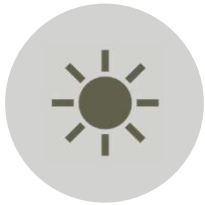
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- SW1**     [@Terri White] [@Alina Lambert] I imagine we want the CBOs being the ones talking to the participant if their site DNQ. The TA will be with the customer during the site assessment, do we want to give them any instruction on how to handle those situations?  
Shannon Wall, 2026-05-14T22:06:34.379
- AL1 0**    There will be a way to identify sites that don't qualify in the Leads PC program. However, we will need to develop some best practices for in-person conversations. This is likely a conversation we'll want to have with CBO's and TA's in the room  
Alina Lambert, 2026-05-15T14:27:00.975
- SW1 1**    Can you review the updates? Including the talking notes  
Shannon Wall, 2026-05-18T17:19:18.640
- AL1 2**    One minor adjustment in the notes: "You do not need to complete a solar proposal if it is pretty clear that the site is ineligible'. Otherwise, looks great!  
Alina Lambert, 2026-05-18T23:11:17.241



# Incentive Calculator Demo

# Participant Communication – Site Assessment & Design



Solar Bid Proposal



System Design



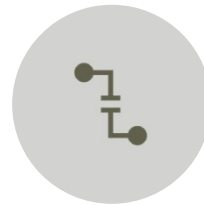
Estimated production  
and utility bill off set



Additional work needed  
for the install



Net metering



Clarification that the  
system does not provide  
backup power without an  
ESS.

# Sign Contract and Submit Application

- Sign contract with participant
  - Follow all contract requirements in HB4029
  - Must be no cost to participant
  - Energy Trust may ask to review a contract template
- Submit application in PowerClerk's "Residential Solar" program with all additional PSAP required documentation.
  - PSAP Incentive Agreement + Income Attestation (220R-PSAP)
  - Enabling repair information
  - PSAP Incentive Calculator
  - Misc. PSAP documentation

## Slide 17

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**SW1**    [@Alina Lambert] Please review this slide I added.  
Shannon Wall, 2026-05-18T17:18:32.759

**AL1 0**   Looks great!  
Alina Lambert, 2026-05-18T23:13:22.990

# Project Approval & Funds Reserved



UPON APPROVAL, PROJECT IS MOVED TO “**FUNDS RESERVED**” STATUS



MILESTONE PAYMENT (50% OF TOTAL APPROVED PROJECT INCENTIVES) IS ISSUED



TRADE ALLY MAY PROCEED WITH PROCUREMENT, PERMITTING, AND PROJECT WORK



## Slide 18

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**AL1** From slide 11 to slide 12 we jump from the Leads program to the Residential program. In the Residential program we're requesting additional documentation to be attached to the application submission- we should call that out here. Also in between the solar proposal and application submission the participant will sign a contract with the customer, which we should mention. Last we spoke about it as a team, we talked about requesting an example PSAP participant contract from the TA's which we still may want to do and call out during this presentation so that they can work with their legal team to provide

Alina Lambert, 2026-05-15T14:30:49.714

# Participant Communication – Before/During Installation



Installation schedule, including dates and expected duration



Daily work hours and crew presence



Schedule for any subcontractor work (e.g., roofing, electrical upgrades)



Areas of the home and property that require access



Safety precautions for occupants, including children and pets



Inspection, net metering, and Program verification timelines

# Scope Changes and Approval

If project conditions require changes to the approved scope:

- Notify the program before proceeding
- Submit an updated scope for program review and approval
- Submit supporting documentation (e.g., photos, revised proposals, cost impacts)

Work completed outside of an approved scope may not be eligible for payment.



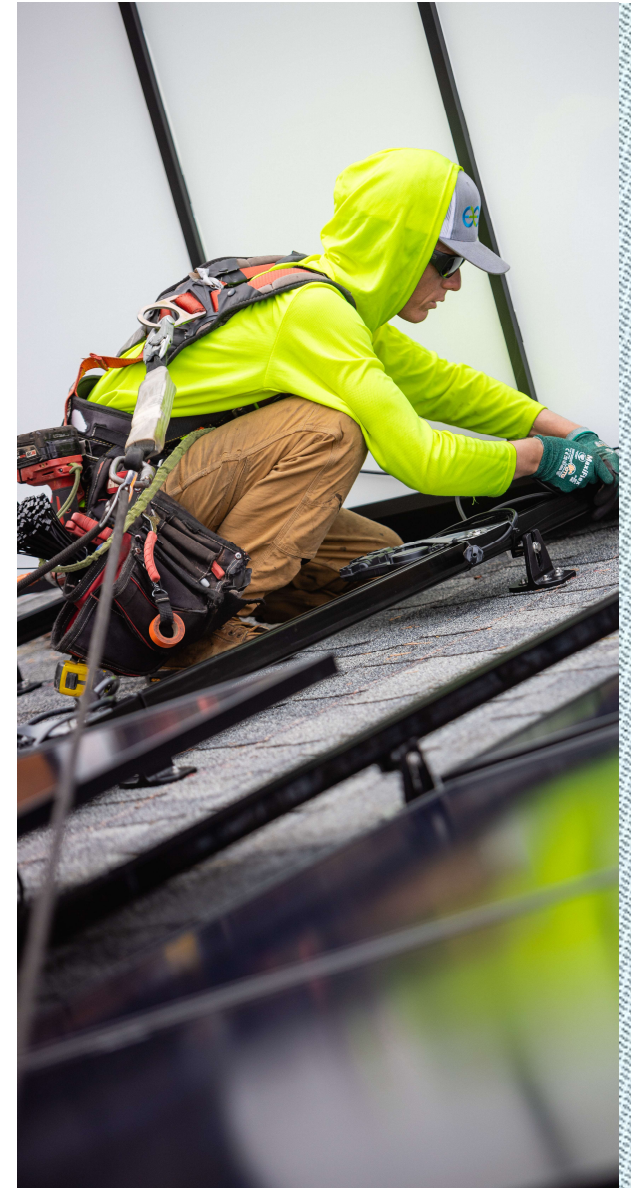
## Slide 20

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- SW1**    [@Alina Lambert] Do they notify Energy Trust of scope or cost changes in PowerClerk or the PSAP inbox after Funds are Reserved?  
Shannon Wall, 2026-05-18T20:54:18.601
- AL1 0**    It's the same process as with other projects: When the TA submits the notice of project installation form in PowerClerk, there's an opportunity to notify the team of cost changes, indicate if changes need to be reviewed and attach any updated documentation.  
Alina Lambert, 2026-05-19T14:37:26.855
- AL1 1**    Changes will be reviewed and the final payment will be adjusted as needed  
Alina Lambert, 2026-05-19T14:37:57.976

# Installation and Project Closeout

- Solar (and battery if applicable) installation
- Complete all approved enabling repair work
- AHJ inspections and net meter installation
- System walkthrough with participant
- Submit project as installed in PowerClerk
- Upload required final documentation
- Final payment is issued upon approval AL1



## Slide 21

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**AL1** Missing onsite verification after the final payment is issued - all PSAP projects are required to go through onsite verification

Alina Lambert, 2026-05-15T14:33:44.662

# Participant Communication – System Walkthrough



Overview of all installed equipment and system operation



Manufacturer warranties and contractor workmanship warranties



System maintenance requirements (if any)



Instructions for accessing and using the monitoring system



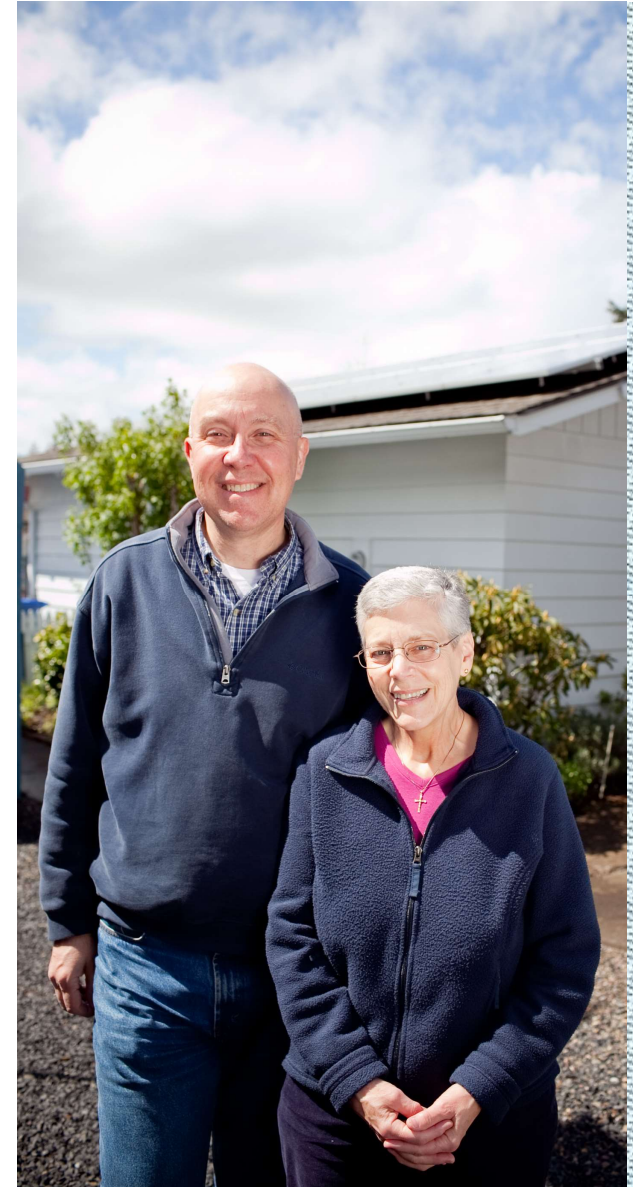
How to identify system performance issues or failures



Customer manual required by Energy Trust's Solar + Storage Program

# Verification

- All projects will go through design review and on-site verification
- Verification will occur **after** final payment is made
- All corrections must be addressed **within 30-days**
  - Trade allies may be placed in suspension for failure to address corrections
  - Suspended trade allies will not receive new PSAP projects
  - Trade allies will be terminated if they do not resolve issues within 30 days of suspension



# Trade Ally Responsibilities

# Communication & Responsiveness



Provide updates on scheduling, delays, and progress



Coordinate with the assigned CBO and share status, scheduling, and issues



Respond to participant inquiries within 1–2 business days



Respond to program and CBO communications within 1 business day

## Worksite Conduct

- Maintain a clean, safe, and respectful work environment
- Treat participant, homes, and property with care
- Communicate access needs, safety considerations, and disruptions in advance
- Ensure all staff and subcontractors behave professionally on site



# Accountability

- Ensure subcontractors meet program requirements
- Deliver consistent, respectful customer experience
- Address issues early and communicate when problems arise



# Conflict Resolution

Escalate issues immediately if they involve:

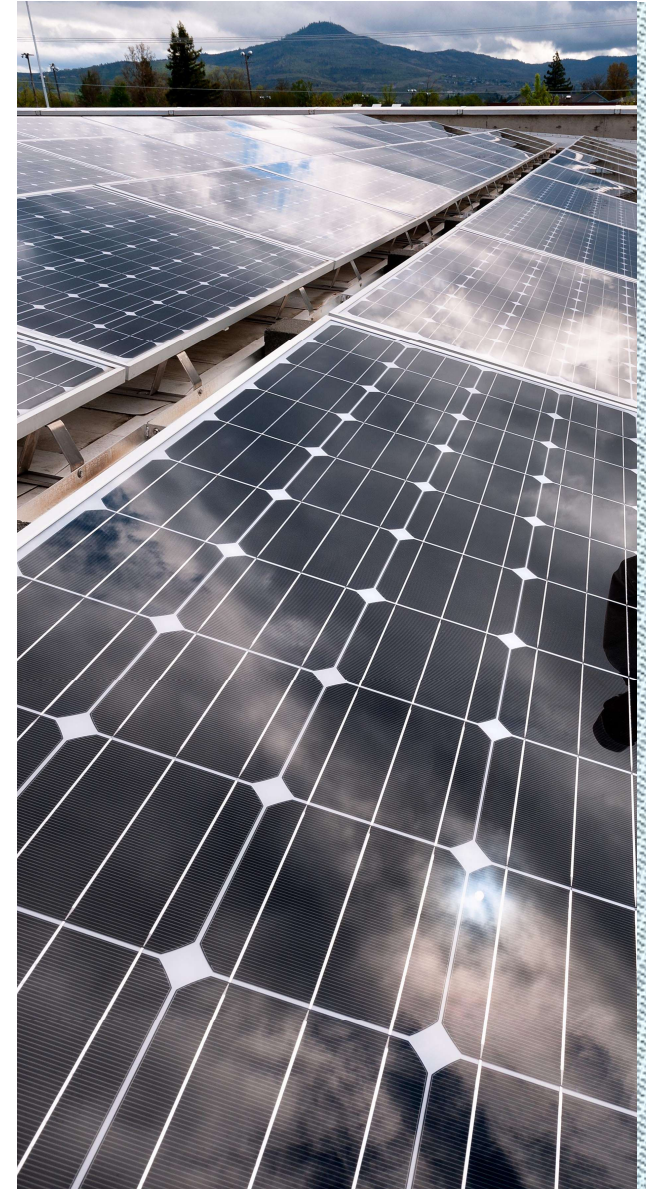
- Safety concerns or unsafe working conditions
- Harassment, discrimination, threats, or intimidation
- Suspected fraud, misrepresentation, or coercive behavior
- Work that may result in property damage or code violations
- Situations where a customer feels unsafe or harmed

Send the following to [PSAP@energytrust.org](mailto:PSAP@energytrust.org):

- PowerClerk project ID
- Customer initials (avoid full names when possible)
- Brief description of the issue
- Urgency level
- Any immediate actions already taken

# What Trade Allies Should Not Do

- Determine or communicate customer eligibility or income tier
- Make commitments regarding funding amounts or program approval
- Perform work outside of an approved scope
- Proceed with installation prior to required approvals
- Accept any payments for the project from other sources not approved by Energy Trust like customer payments or funding that takes it over 100% of project cost etc.



# Enabling Repairs

# Enabling Repairs

Automatic: Capped at Enabling Repair budget Manual Approval: Required further approval	Measure	Description
Automatic Approval	<b>Structural Engineering</b>	Residential projects that don't meet the prescriptive path may need engineering analysis.
Automatic Approval	<b>Roof Structural Integrity</b>	Ensuring rafters and trusses can support the additional load. This may involve sistering rafters, adding collar ties, knee walls or making repairs where there is rot, termite damage, or undersized framing
Automatic Approval / Manual Approval needed if the repair exceeds the enabling repair budget cap for that project, in which case it requires manual review to assess available funds and/or other limitations.	<b>New Roof</b>	Roof has less than 10 years of remaining life, major rots, or sagging
Automatic Approval	<b>Roof Repair</b>	Roof repairs like plywood/roof deck replacement, large shingle replacement, ensuring material compatibility, no active leaks
Automatic Approval	<b>Clear Roof Area</b>	Removal or relocation of attic vents, plumbing vents, satellite dishes, skylights, or old antennas if they restrict array design
Automatic Approval	<b>Unsafe Wiring</b>	Removal or isolation of knob-and-tube wiring Repair of DIY or unpermitted electrical work
Automatic Approval	<b>Critter gaurd/ critter block</b>	Depending on location if it is necessary to prevent animals from getting underneath the panels
Manual Approval	<b>Security Measures</b>	Protect system from vandalism
Manual Approval	<b>Transformer</b>	The transformer serving the homes in the area may need to be upgraded to allow a solar system to be installed. Solar+storage systems could be designed and programmed to not allow export ("backfeed") to get around this constraint.
Automatic Approval	<b>Tree Trimming / Tree Removal</b>	Trimming or removing trees that create shade on the array bringing TSRF below the qualifying level for Energy Trust incentives.

- **Enabling Repairs:** Repairs that are necessary to allow a solar or energy storage system to be safely and successfully installed.
- **Incentive Cap:** Must not exceed the established enabling repair cap from the incentive calculator.
- **Automatic Approval** – No prior approval needed for these repairs.
- **Manual Approval/Not listed** – Energy Trust may require a manual review and approval. Send the details of the repair (scope, cost, justification) to your account manager or [PSAP@energytrust.org](mailto:PSAP@energytrust.org)

AL1

## Slide 31

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**AL1** [Terri White] [Nayan Alailima-Rose] Are the TA Account managers responsible for reviewing manual enabling repairs? We have a step built into the PC process for the delivery team to review these, but it's unclear on what would prevent approval or what the desired process is. The TA training is before our next PSAP core team meeting so we should resolve beforehand if possible

Alina Lambert, 2026-05-15T14:38:47.394

**NA1 0** [Alina Lambert] The biggest barrier to approval will likely be available budget. In those cases, the PSAP team may need to do additional digging and coordination to identify supplemental funding sources to support a repair so the TA account manager should route the request to us.

Over time, if we identify a more standardized approach for handling these cases, we could potentially shift more responsibility to the TA AMs. But for now, all manual approvals should be sent to the PSAP team (likely just Terri and me). We can then review cap limitations, available budget, CBO feedback on customer-specific needs, and other relevant factors to help determine approval for the TAs.

Hope that helps!

Nayan Alailima-Rose, 2026-05-19T00:22:07.143

**AL1 1** Ok we will inform the delivery team to escalate any manual approval requests in the leads program or residential program to you and Terri via email. [Eduardo Beltran] [Abby Hoffman] [Shannon Wall] flagging for visibility

Alina Lambert, 2026-05-19T14:41:11.975

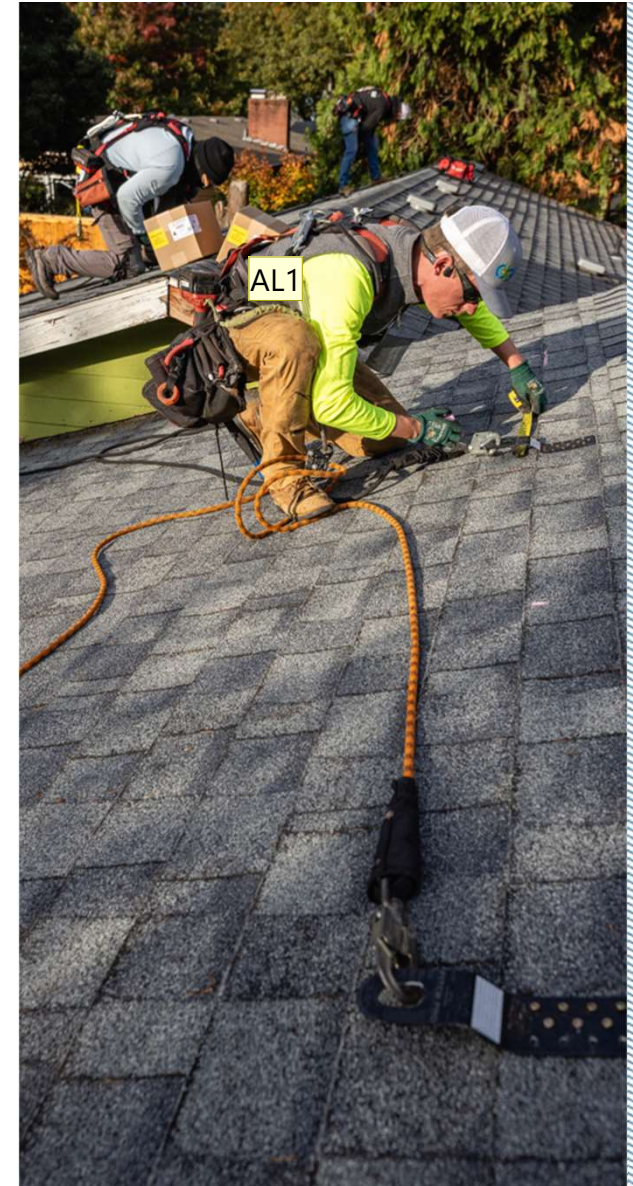
# Solar & Storage Budget

Funding Source	Funding Source	Measure	Description
Automatic Approval	Solar	<b>Rooftop Solar Panels &amp; Inverter</b>	High-efficiency solar modules installed on code-compliant roof structures with proper mounting hardware. Inverters must be UL-listed, grid-interactive, and sized appropriately for the system's design. Monitoring hardware and communication devices.
Manual Approval	Battery	<b>Battery Storage</b>	On-site critical load back-up for homes. Program-approved, UL-certified energy storage systems installed with required disconnects and communication hardware. Must integrate safely with the home's electrical system and meet all fire, spacing, and ventilation requirements.
Automatic Approval	Solar	<b>Engineering</b>	Stamped structural and electrical plans prepared by licensed professionals confirming the home can support the system. Includes load calculations, attachment details, and compliance with NEC, building codes, site assessment, shading analysis, and system sizing, and utility standards.
Automatic Approval	Solar	<b>Solar Electrical Connection</b>	System must interconnect using approved methods such as a dedicated solar breaker, line-side tap, or service-upgrade pathway. All wiring, grounding, labeling, and safety devices must meet NEC and utility interconnection requirements.
Automatic Approval	Solar	<b>Customer Education &amp; Support</b>	Site assessment + Consultation Customer walkthrough + educational materials as applicable Professional communication, safe work practices, and property protection. Warranty assistance and troubleshooting for system performance or equipment issues. Providing support for system issues, monitoring alerts, or performance concerns.
Manual Approval	Upgrade	<b>Electrical Panel Upgrade</b>	Replacing outdated or undersized panels: Upgrading main-lug only (MLO), split-bus, or recalled panels (e.g., Zinsco, Federal Pacific, Challenger) to a modern 200A conventional main service panel (MSP) to handle solar and/or battery storage. Panel condition and safety checks: Ensuring proper grounding, bonding, and wiring for code compliance.
Manual Approval	Upgrade	<b>Service Upgrade</b>	Compatibility with utility meter: Making sure the panel works with the existing meter and utility requirements. Panel relocation (if needed): Moving the panel to meet clearances and current code standards Additional electrical work: May include installing a new main disconnect, modern meter base, or overhead service mast/wires.

- Costs that come out of the solar & storage budget.
- Batteries, panels upgrades, and service upgrades require approval.
- For approval, send the details and justification for the work to your account manager or [PSAP@energytrust.org](mailto:PSAP@energytrust.org)

# Enabling Repair Documentation

- Must submit the following information in the Residential Program in PowerClerk as part of the application package <sup>AL2</sup>
  - Trade Ally Information
  - Subcontractor Information (if applicable)
  - Customer/Site Information
  - Scope of Work
  - Enabling Repair Costs
  - Photos of Existing Conditions
- An Enabling Repair Documentation Template can be found on the Insider.



## Slide 33

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**AL1** Residential Program in PowerClerk

Alina Lambert, 2026-05-15T14:39:26.020

**AL2** Missing 'costs'

Alina Lambert, 2026-05-15T14:40:20.381

# Trade Ally Enabling Repair Responsibilities

- Identify enabling repairs during site assessment.
- Include enabling repair estimates in the Incentive Calculator and submit with the proposal.
- Inform Energy Trust if enabling repairs are identified after the solar proposal has been approved.
- Submit Incentive Calculator with any updated enabling repair costs with the application package.
- Ensure enabling repairs do not exceed 30% of the system cost.
- Submit all enabling repair documentation.
- Complete the enabling repair work or bring on a subcontractor to complete the work.

## Slide 34

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- AL1** Flagging that enabling repair estimates are required to be submitted during the leads process as part of the solar proposal. Then, after receiving quotes from subcontractor (if needed) or having a more definitive price, those are included in the enabling repair template submitted with the application package. If there were any adjustments to the budget in the calculator, those will be reviewed again at the time of application submission  
Alina Lambert, 2026-05-15T14:46:27.249
- SW1 0** [@Alina Lambert] See updates  
Shannon Wall, 2026-05-18T17:17:37.784
- AL1 1** Thanks Shannon! Main takeaway for TA's: Enabling repairs will first be reported in the solar proposal and calculator. Second opportunity to report enabling repairs is in the Residential Application Package in the Enabling Repair document and calculator  
Alina Lambert, 2026-05-19T14:50:05.221

# Working with Subcontractors

## Trade Allies must:

- Vet their own subcontractors
- Pay subcontractors for the work they perform
- Inform subcontractors about all wage and reporting requirements
- Ensure Energy Trust receives the required reporting from subcontractors.

## Subcontractor Requirements

- Subcontractors must pay PCEF wages for **all** work performed.
- **All** subcontractors must register their business with Energy Trust.
- Subcontractors receiving \$5,000 or more on a project must provide staff and wage reporting.



Thank you  
See you in-person on May27th!

Shannon Wall  
Project Manager - Renewables

Contact info:  
[PSAP@energytrust.org](mailto:PSAP@energytrust.org)

