

Conducting a Solar Resource Assessment with OpenSolar for Energy Trust Incentive Applications

To be eligible for Energy Trust incentives, each application must include a solar resource assessment conducted with an approved site analysis tool. These assessments evaluate how shading, tilt, and orientation affect the system's expected annual energy output. When using remote shading analysis tools such as OpenSolar, Energy Trust requires that every individual array on a site maintain a Total Solar Resource Fraction (TSRF) of at least 80% to qualify for incentives.

For more information: www.opensolar.com

[Watch the recording of our introductory webinar.](#)

Prior to using OpenSolar to create a solar resource assessment, please consult our [Help Center](#) resources or [reach out to our team](#) for an official training with OpenSolar Staff.

Beginning Your Project

1. [Create a New Project](#) by entering a customer's address on the home page.
2. Go to the [OpenSolar Design Studio](#) to begin building your system designs.
3. If 3D is available with Google or Nearmap, use the 3D Mode (instructions below). If 3D is unavailable, then use the Manual Mode to create a 3D design and shading (instructions below).

Designing in OpenSolar's 3D Mode

1. Make sure to use OpenSolar's [3D Mode](#) to [build your system designs](#).
2. Design a solar electric system that meets all program requirements, provides the customer with maximum performance and mitigates the effect of any shade that may be present.
3. Once you have completed your system design, you'll need to gather your TSRF value.
4. You can do this by going to the Project -> Manage page. Scroll down to the [document section](#) and from there you will be able to [generate a shade report](#).
5. Enter either the annual TSRF for each individual array or the lowest overall annual TSRF value for any array into the PowerClerk incentive application.
6. Submit the shade report as an attachment to the incentive application in PowerClerk.
7. If 3D Mode is not available, then you can still generate a shade report for system designs created in OpenSolar's 2D Mode or Manual Mode by following the steps below.

Designing in OpenSolar's Manual Mode - [Creating a 3D Design in Manual Mode](#)

1. Select [OpenSolar's Manual Mode](#) from the Design Mode dropdown. Go to the Advanced toolbar and select the quick roof design feature that is applicable for the customer's home.
2. Once selected, follow the step-by-step instructions to draw the roof. Once the roof is drawn, it will create a 3D model of the property from the 2D image. You can adjust height and sizing from there.
3. Once the building has been created, you will want to add any trees or surrounding obstructions. You can do this by going to the Advanced toolbar and selecting the Tree or Obstruction features.
4. Once you have added and properly sized your trees and obstructions, you'll want to design a solar electric system that meets all program requirements. Make sure the system provides the customer with maximum performance and mitigates the effect of any shade that may be present.
5. Once you have completed your system design, you'll need to gather your TSRF value.
6. You can do this by going to the Project -> Manage page. Scroll down to the [document section](#) and from there you will be able to [generate a shade report](#).
7. Enter either the annual TSRF for each individual array or the lowest overall annual TSRF value for any array into the PowerClerk incentive application.
8. Submit the shade report as an attachment to the incentive application in PowerClerk.

[OpenSolar Shade Report Example](#) - You can find the overall TSRF value on page one and then the individual TSRF values for each Array on the corresponding pages of the Shade Report

