



Portland Solar Access Program (PSAP)

Getting Paid & Staying Compliant

Energy Trust of Oregon
Funded by the Portland Clean Energy Fund PCEF
Wednesday, June 3, 2026

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

Staying in Good Standing

- Wage requirements (PCEF)
- Equipment Requirements

Systems and Documentation

- PowerClerk
- Required documentation
- Submissions and tracking

How You Get Paid

Milestone Payment Process

Submit residential application package in PowerClerk



Energy Trust reviews application

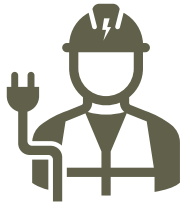


Energy Assurance Company reviews design



Milestone payment issued once project is in 'Funds Reserved'

Milestone Payments



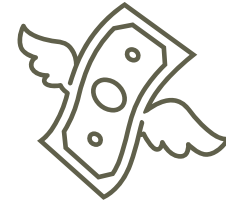
Includes solar, storage, & enabling repair costs.



50% of project cost determined by Incentive Calculator turned in with application package.



Paid via Electronic Fund Transfer.



10 active project limit for milestone payments

Project Cancellations

If a project is cancelled after milestone payment but before installation:

- Milestone payment (or partial payment) will be transferred to a new project via debit/credit memo.
- If there are no other projects in the pipeline, trade ally repays payment (or partial payment) to Energy Trust via check.



Final Payment Process

Submit any scope or cost changes for approval



Complete approved enabling repair work & solar installation



AHJ inspections and system walkthrough



Submit project as installed in PowerClerk



Final payment is issued upon approval

Final Payments



Is remaining approved
incentive amount



Final payment will be
adjusted if costs change.

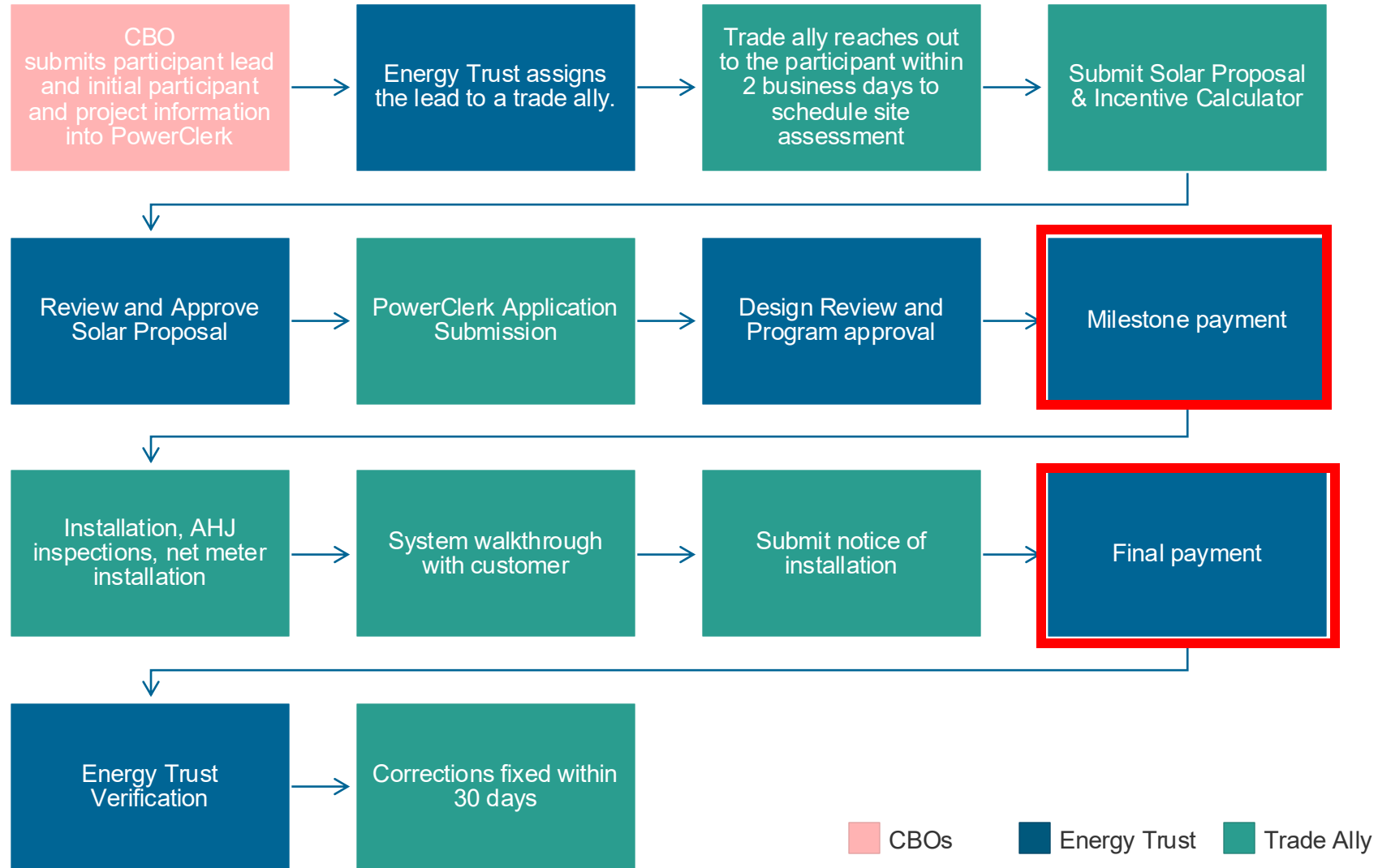


Paid via Electronic Fund
Transfer.



Paid before on-site
verification

Project Workflow



Reporting Requirements

Purpose of Reporting and PCEF Compliance

Mandatory Reporting Requirement

Reporting is essential for PSAP participation due to PCEF's strict workforce, wage, and accountability standards.

Workforce and Wage Verification

Reports document workforce participation and ensure workers are paid according to PCEF wage requirements.

Reporting Process and Schedule

PSAP compiles reports from trade allies and subcontractors using standardized templates and consistent submission schedules.

Contractual Obligation

Reporting is a contractual obligation essential for funding, payment processing, and program eligibility.

Workforce
Reporting

Monthly
Reporting

Subcontractor
Reporting



Trade Ally Responsibilities and Accountability

Complete and Timely Reporting

Trade allies must ensure all PSAP reports are accurate, complete, and submitted on time to maintain compliance.

Accountability for Subcontractors

Trade allies are responsible for subcontractor data accuracy, even when subcontractors submit reports directly to PSAP.

Corrective Actions for Non-Compliance

Repeated reporting errors may lead to warnings, oversight, suspension, or program removal.

Reporting Components

Trade Ally Business

- Business registration
- Worker registration
- Worker hours on a project
- Subcontractor payments made

Subcontractor Business

- Business registration
- If paid over \$5k per project
 - Worker registration
 - Worker hours on a project



Workforce Reporting – Business Registration

First reporting requirement

- Collected in the Workforce Registration form workbook
- Submitted at the reporting workbook walkthrough with your Account Manager

One-time requirement; however, any changes to these details must be reported to psap@energytrust.org

Details

Business Name

Organization Type

Location

Business certifications (e.g. Minority-Owned, Women-Owned, Service-Disabled, etc.)

COBID Certification #

NAICS Category

Voluntary leadership demographics

Workforce Reporting – Worker Registration

Required for all paid workers on PSAP projects that will be performing on-site work.

- Office/admin staff are excluded.
- May include some subcontractors.
- Submitted *before* an individual begins work on the project.
- Collected in the Workforce Registration form.
- Unique IDs are used to protect confidentiality. Trade allies must track names and IDs
- Hourly wage must be the take-home wage excluding benefits and must meet PCEF minimum wage requirement.

Workers need to be registered only once. Report any changes promptly to psap@energytrust.org.

Details
Staff Unique ID*
Employer
Ownership status
Trade/job title
Apprentice/journey status
Hourly wage
Zip code of residence
Voluntary demographics

*Format for Unique IDs is provided in PSAP approved templates

Workforce Reporting – Worker Registration Cont.

Roles required to report include those directly involved in installation projects, such as:

- Site assessors
- Engineers/designers
- Installers
- Specialty or other trade installers
- Laborers
- Project or construction managers
- Other staff directly involved in PCEF-funded installation activities
- Staff of subcontractors performing PCEF-funded installation activities

At this time, roles not required to report include, but are not limited to:

- Administrative staff
- Staff not directly involved in PCEF-funded installation activities.
- Staff performing work not funded by PCEF, even if on the same job (i.e., staff installing batteries funded by Energy Trust)



Monthly Reporting – Worker Hours

Required for each registered worker on a project.

- **Two emails** from PowerClerk will inform when the hours for that project are considered "reportable":
 1. Project Installed Status
 2. Completed Status
- Collected in the Project Reporting template
- Only previously registered worker IDs may be reported
- Hours included per project should be consistent with business practices.

Worker hours must be submitted each month no later than the **10th of the month** to psap@energytrust.org

Details

Reporting month

PowerClerk ID

Employer

Staff Unique ID

Total hours worked



Monthly Reporting – Subcontractor payments

Required for each registered subcontractor on a project.

- Email notification from PowerClerk once the project is installed will decide when the subcontractor dollars for that project are considered "reportable"
- Collected in the Project Reporting template
- Only previously registered subcontractors may be reported
- Payments must match your invoice.

Subcontractor payments must be submitted each month no later than the **10th of the month** to psap@energytrust.org

Details

Reporting month

PowerClerk ID

Subcontractor

Total dollars paid



Subcontractor Reporting - Business Registration

Required for all subcontractors receiving payment on PSAP projects.

- Submitted *before* a subcontractor begins work on the project.
- Collected in the Workforce Registration form.
- May be submitted by trade allies, or by subcontractors directly.
 - Trade allies are responsible for ensuring that subcontractors complete reporting.

Subcontractors need to register only once. Report any changes promptly to psap@energytrust.org.

Details

Business Name

Prime Contractor

Organization Type

Location

Business certifications (e.g. Minority-Owned, Women-Owned, Service-Disabled, etc.)

COBID Certification #

NAICS Category

Voluntary leadership demographics

Subcontractor Reporting – Workforce Requirements

Subcontractor workforce reporting is determined by the total amount paid to the subcontractor on a PSAP project.

If a subcontractor receives more than \$5,000:

- Eligible workers must be registered with a unique ID and compliant hourly wage following the same process as trade ally crews
 - Subcontractors may submit IDs and wages directly to PSAP
- Subcontractor worker hours by unique ID must be included in trade ally's monthly reporting

If a subcontractor receives \$5,000 or less:

- Worker registration and hours reporting is not required
- **PCEF wage requirements still apply - Trade allies will:**
 - Agree to pay workers the PCEF minimum wage
 - Agree to random payroll audits, and
 - Require the same compliance from their subcontractors



Reporting Summary

Reporting Cadence	Reporting Template	Used for	Submitted By
<p>Ongoing, report whenever:</p> <ul style="list-style-type: none"> ✓ A new worker will support a PSAP project ✓ A new subcontractor will support a PSAP project ✓ Changes to previously registered worker or subcontractor details 	Workforce Registration Form	<p>Always required:</p> <ul style="list-style-type: none"> • Trade ally business details • Subcontractor business details • Trade ally worker registration <p>If subcontractor is paid more than \$5,000 on a project:</p> <ul style="list-style-type: none"> • Subcontractor worker registration 	Trade allies or subcontractors
<p>By the 10th of each month for projects installed in the prior month</p>	Project Reporting Template	<p>Always required:</p> <ul style="list-style-type: none"> • Trade ally worker hours • Subcontractor payments <p>If subcontractor is paid more than \$5,000 on a project:</p> <ul style="list-style-type: none"> • Subcontractor worker hours 	Trade allies only

All reporting must be submitted to the PSAP program team at psap@energytrust.org

Staying in Good Standing

Wage Requirements

- 180% of the Oregon state minimum wage as it applies to Portland
 - Visit [Oregon.gov](https://www.oregon.gov) for current minimum wages
 - Updated annually on July 1
 - \$29.34 per hour for July 1, 2025, through June 30, 2026
 - \$30.24 Starting July 1, 2026
- Applies to all work directly involved with PSAP projects including work done by Subcontractors



Equipment Requirements

Equipment must be manufactured in the U.S.

- There is no requirement regarding the origin of components or subcomponents
- Equipment labeled “Made in USA”, “Assembled in USA”, or “Made in USA with Global Materials” may qualify

Approved Equipment:

- Must meet all solar + storage installation requirements
- Approved list is in PowerClerk.
- Email your Account Manager to add to the approved list.



Equipment Requirements - Exceptions

Email PSAP@energytrust.org if:

- Equipment is not available in sufficient and reasonably available quantities
- Equipment is not of satisfactory quality
- Use of domestically produced equipment would increase total project cost by more than 25%

Include:

- All relevant details
- Justification
- Proposed alternative equipment



Systems & Documentation

**PowerClerk
Portland Solar Access Program Leads**

Trade Ally Site Assessment Review

- Review participant details from CBO
- Indicate if there are any enabling repairs that need approval
- Upload Solar Proposal
- Upload Incentive Calculator
- Indicate if the home is a good candidate for PSAP
- Included any necessary notes

Are there enabling repairs that require manual review by the program team? * ?

Any enabling repairs that require manual approval, select 'yes' and 'maybe' for the project being a good candidate for PSAP incentives and the project will move to Home Assessment Review status.

Yes

No

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

Trade Ally Site Assessment Review cont.

If there are enabling repairs that need to be approved or if you select 'no' or 'maybe' for home being a good candidate for PSAP, the program will review.

After program approval, update/complete application and submit.

Date Program Staff reviewed home assessment concerns

5/29/2026



PSAP Candidate

Yes

No

Maybe

Comments on home assessment concerns

We have external funding for this roof repair

Are there enabling repairs that require manual review by the program team? * ?

Yes

No

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

Yes

No

Maybe

PowerClerk Statuses

- **Trade Ally Assigned** – CBO has done initial intake & the Program has assigned the trade ally.
 - **Home Assessment Review** – The Program is reviewing for eligibility and approving enabling repairs.
 - **Solar Proposal Complete** – Trade ally completed the site assessment and indicated that it is a good candidate for PSAP.
 - **Solar Proposal Revisions Required** –Revisions required after program review.
 - **Solar Proposal Approved** – The Program reviewed and approved the proposal.
 - **Solar Lead Complete** – CBO completes the lead.
- ~Trade ally can now move forward with contract & design~**

PowerClerk - Residential

Solar or Solar + Storage Application – Additional Project Details

- New Solar or Solar + Storage Application
- Select ‘Participant is eligible on Additional Project Details page.
- Add Lead ID, Solar Proposal changes, and select CBO.

Solar or Solar+Storage Application

For new Solar and new Solar+Storage projects

< 2 3 4

Trade Ally Contractor System Components Additional Project Details

Participant is eligible for Portland Solar Access Program and has been vetted by a CBO.

PSAP PowerClerk Lead ID * ?

PSA-00018

There have been changes to the project since the Solar Proposal was approved.

Please describe Solar Proposal changes. *

Updated Enabling Repair Costs

Community Based Organization working with participant *

APANO

Community Energy Project (CEP)

Self Enhancement, Inc (SEI)

Solar or Solar + Storage Application - Costs

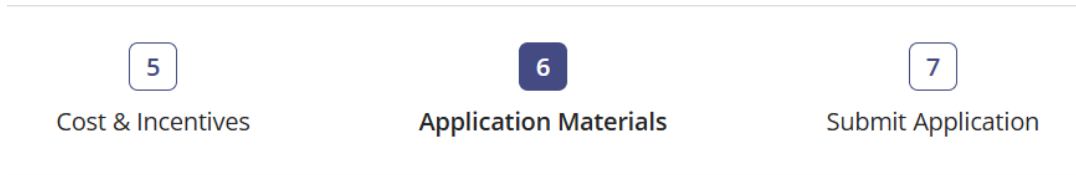
<p>Total Installed Project Cost * ? \$ 33,500</p> <p>Solar System Cost * ? \$ 20,000</p> <p>Electrical Panel Upgrade ? \$ 5,000.00</p> <p><input checked="" type="checkbox"/> This project includes enabling repairs</p> <p>Enabling Repair Cost * ? \$ 8,500.00</p> <p>External Funding - Solar ? \$</p> <p>External Funding Battery Storage ? \$</p> <p>External Funding - Enabling Repairs ? \$</p> <hr/> <p>Enabling Repair Percent of Total System Cost ? 25.37 %</p>	<p>3 System Components</p> <p>4 Additional Project Details</p> <p>5 Cost & Incentives</p>	<p><input checked="" type="checkbox"/> This project will receive a 50% total project cost milestone payment *</p> <p>Energy Trust Solar Incentive * Energy Trust Solar Incentive PSAP 0626 (TEST) (COPY) ▾ Incentive Amount for Energy Trust Solar Incentive PSAP 0626 (TEST) (COPY): \$6,000.00</p> <p>PSAP Solar Incentive PCEF Solar Incentive PSAP 0626 (TEST) (COPY) ▾ Incentive Amount for PCEF Solar Incentive PSAP 0626 (TEST) (COPY): \$19,000.00</p> <p>PSAP Enabling Repair Incentive PCEF Enabling Repair Incentive PSAP 0626 (TEST) (COPY) ▾ Incentive Amount for PCEF Enabling Repair Incentive PSAP 0626 (TEST) (COPY): \$8,500.00</p>	<p>Total Incentives for Project ? \$ 33500.00</p> <hr/> <p>PSAP Total Project Cost ? 33,500.00 \$</p> <hr/> <p>PSAP Total Net Project Cost ? \$ 33500.00</p> <hr/> <p>Participant Purchase Price after PSAP incentives \$ 0.00</p> <hr/> <p>PSAP Total Milestone Payment ? \$ 16750.00</p>
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1. Enter costs to match Incentive Calculator & confirm enabling repair cost is under 30%

2. Select Energy Trust incentive and PSAP incentives and calculate

3. Confirm Participant Purchase Price is \$0 and Milestone payment is correct

Solar or Solar + Storage Application – Application Materials



- Request Participant signature on PSAP Incentive Agreement form.
- Upload the following:
 - Enabling repair information (template found on Insider)
 - Incentive Calculator with any updates from Solar Proposal phase
 - All other documents needed for other Residential projects.

PSAP Incentive Agreement * (Electronic Signature) [Change Signature Type](#)

Form 220R-PSAP - Portland Solar Access Program Incentive Agreement and Income Attestation

[Preview Document](#)

eSignature Status

Form 220R-PSAP - Portland Solar Access Program Incentive Agreement and Income Attestation

Host Customer : peppercat@catmail.com

[Request Signatures](#)

Required Materials

Enabling Repair Information * [?](#)

[Browse](#)

PSAP Incentive Calculator * [?](#)

[Browse](#)

Solar Resource Assessment * [?](#)

[Browse](#)

One-Line Electrical Schematic * [?](#)

[Browse](#)

Physical Layout Diagram * [?](#)

[Browse](#)

I would like to provide additional design materials [?](#)

PSAP Additional Information [?](#)

[Browse](#)

Enabling Repair Documentation

Required Information

- Scope of work
- Contractor performing the work
- Estimated cost
- Photos of existing conditions

Template Found on Insider

Project Details – Enabling Repair 1

Scope of Work

Describe the scope of work and why it is needed before installing solar.

Click or tap here to enter text.

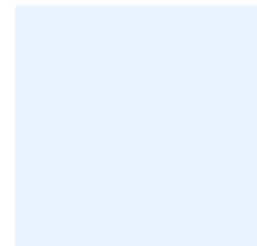
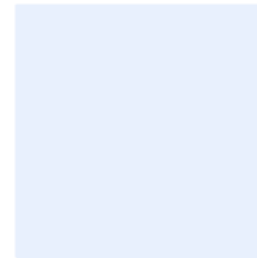
Contractor Performing Work

Click or tap here to enter text.

Estimated Cost

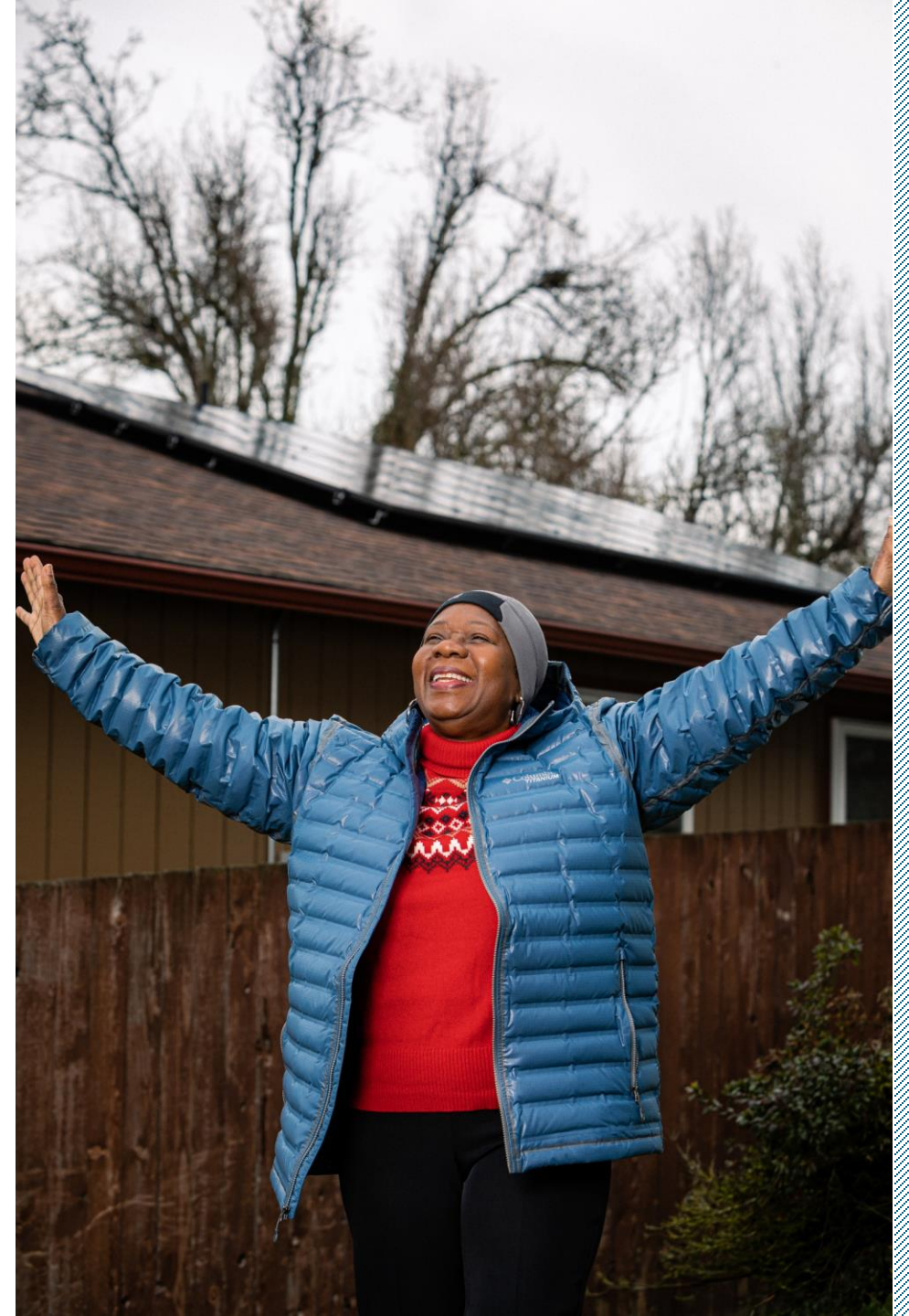
Click or tap here to enter text.

Photos of existing conditions



Submit Notice of Project Installation

- Let us know if there are final cost changes.
- Upload final project invoice (template found on the Insider)
- Attest that you have registered all workers on this project with PSAP.



Invoice Requirements

Sample Solar, LLC

123 Sample Street
 Portland, OR 97XXX
 Phone 555-555-5555
 Email: accounting@samplesolar.com

SAMPLE INVOICE

Invoice Number:	00001
Invoice Date:	7/31/2026
Residential PowerClerk ID:	XXXXX
Installed Date:	6/15/2026

DESCRIPTION	QUANTITY	RATE	AMOUNT
Renewable Energy Measures			
Solar System Cost	1	\$ 13,000.00	\$ 13,000.00
Electrical Panel Upgrade	1	\$ 5,000.00	\$ 5,000.00
Energy Trust Solar Incentive	1	\$ (6,000.00)	\$ (6,000.00)
PCEF PSAP Solar Incentive	1	\$ (12,000.00)	\$ (12,000.00)
Subtotal Renewable Energy Measures			\$ 18,000.00

Enabling Repair Measures (not included in above)			
Roof clearing	1	\$ 3,000.00	\$ 3,000.00
PCEF PSAP Enabling Repair Incentive	1	\$ (2,000.00)	\$ (2,000.00)
PCEF Energy Friendly Homes Repair Incentive	1	\$ (1,000.00)	\$ (1,000.00)
Subtotal Enabling Repair Measures			\$ 3,000.00

PAYMENT TERMS:
 Payable to xxx
 Due in xxx days.

TOTAL	\$ 21,000.00
Milestone Incentive Payment	\$ (10,000.00)
External Funding	\$ (1,000.00)
Participant Co-funding	\$ -
Final Amount Due (ETO)	\$ 10,000.00
Final Amount Due (Participant)	\$ -

Residential Powerclerk
 Project ID

Invoice Date and Invoice
 Number

Measure-by-Measure Line-
 Item Costs

Each incentive, shown as a
 discount

External funding and/or
 incentives

Milestone Payment (if
 applicable)

Final Amount Due



Thank you

Shannon Wall

Project Manager – Renewables

Nikita Chan

Account Manager – Solar

Kyle Holmes

Account Manager – Solar

Contact info:

PSAP@energytrust.org