Portland Solar Access Program

Trade Ally Guide

For trade allies participating in the Portland Solar Access Program (PSAP)

DOCUMENT NOTICE

This is a living guide and is subject to change as the Portland Solar Access Program (PSAP) evolves. Trade allies are responsible for following the current version of this guide and all related program requirements.

Trade allies will be notified of significant updates to this guide via email. Update notifications will include a summary of major changes when applicable.

PORTLAND CLEAN ENERGY COMMUNITY BENEFITS FUND

The Portland Solar Access Program has been made possible in part by a grant from the City of Portland, Portland Clean Energy Community Benefits Fund.

Contents

1 Introduction

This guide outlines how trade allies participate in and deliver no-cost solar + storage projects for single-family households through the Portland Solar Access Program (PSAP). It provides clear expectations, processes and standards to support successful implementation, strong communication and high-quality outcomes.

This guide should be used alongside the Program Guide for Solar Trade Allies, Solar Within Reach requirements and Solar + Storage Design & Installation Requirements.

This guide helps trade allies understand how to operate within PSAP, including:

- Program workflow and project lifecycle
- Roles and responsibilities of program partners
- Communication expectations and service standards
- Project delivery requirements and quality assurance processes
- Payment structure and invoicing requirements
- Required systems, training and reporting

This guide will be updated periodically as the program evolves. Trade allies will be notified of significant updates.

Questions or requests for clarification should be directed to Operations Support at PSAP@energytrust.org.

1.1 Zero Tolerance Policy

The Portland Solar Access Program (PSAP) is committed to maintaining a safe, respectful and inclusive environment for all stakeholders, including participants, trade allies, subcontractors and program staff.

All participants are prohibited from discrimination, harassment, threats, intimidation or other unsafe behavior, including conduct based on race, color, national origin, disability, sexual orientation, gender identity, sex, religion, age or any other protected characteristic. Severe misconduct, including physical violence, harassment or threats of harm, may result in immediate removal from the program and referral to appropriate authorities.

Additional details on reporting and resolution processes are outlined in ***Section1.4, Conflict Resolution***.

1.2 Professional Conduct Expectations

Trade allies are expected to maintain a high standard of professionalism in all interactions with participants, community-based organizations (CBOs), subcontractors and program staff.

Trade allies represent PSAP, Energy Trust of Oregon (Energy Trust) and the Portland Clean Energy Benefit Fund (PCEF) in the field and are expected to act with courtesy, honesty, integrity and respect.

1.2.1 Communication & Responsiveness

Trade allies must:

- Communicate clearly and professionally
- Set expectations for timelines, scope and system performance
- Provide updates on scheduling, delays and progress
- Coordinate with their 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
- Initiate participant contact within the timeframe listed under Project Acceptance Requirements listed in ***Section 7.2***

1.2.2 Worksite Conduct

Trade allies and their teams must:

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

1.2.3 Accountability

Trade allies are responsible for:

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

Failure to meet these expectations may result in corrective action, including suspension or removal from the program.

1.3 Maintaining PSAP Trade Ally Status

Participation in PSAP is separate from participation in Energy Trust's Solar Trade Ally Network. Trade allies may be in good standing with Energy Trust but not eligible for PSAP participation.

1.3.1 Good Standing Requirements

Trade allies must meet all PSAP program requirements and comply with the PSAP Trade Ally Participation Agreement (PSAP Participation Agreement) to remain in good standing.

1.3.2 Warning or Suspension

Trade allies may receive a warning or be placed in suspension depending on the severity of the issue. Trade allies will be notified in writing if placed in suspension and will have **30 days** from the notice date to resolve the issue. Failure to resolve the issue within this timeframe may result in termination from PSAP.

1.3.2.1 Examples of Actions That May Result in Warning or Suspension

- Failure to correct issues identified during verification within 30 days
- Failure to submit accurate or timely PSAP reporting
- Failure to attend required training courses
- Failure to maintain communication with participants, CBOs or program staff
- Failure to respond to assigned leads within 2 business days
- Failure to educate participants on system operation and monitoring
- Failure to ensure subcontractors meet program requirements
- Failure to comply with the PSAP Participation Agreement or this Trade Ally Guide

1.3.3 Suspension Status

During suspension:

- Trade allies will not receive new PSAP project assignments
- Trade allies may continue working on already assigned projects unless otherwise directed

1.3.4 Termination

Trade allies may be terminated from PSAP for:

- Failure to resolve issues during suspension within the required timeframe
- Suspension or termination from Energy Trust's Solar Trade Ally Network
- Repeated or severe violations of program requirements

1.3.4.1 Examples of Actions That May Result in Immediate Termination

- Repeated program violations
- Misconduct toward participants, CBOs or program staff
- Misrepresentation of PSAP, Energy Trust or PCEF
- Failure to maintain acceptable project quality or performance

1.3.5 Post-Termination Process

Upon termination:

- No new PSAP projects will be assigned
- Work on active PSAP projects may be reassigned at the program's discretion
- Payment will be issued for completed and approved work in accordance with program requirements

1.4 Conflict Resolution

PSAP is committed to a safe, respectful environment for participants, trade allies, subcontractors, CBOs and program staff. This section explains how trade allies report concerns, escalate issues and support resolution during project delivery.

1.4.1 When to Escalate Immediately

Trade allies must 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 participant feels unsafe or harmed

1.4.2 How to Report or Escalate an Issue

To report a concern or request support:

- Email: PSAP@energytrust.org and copy the respective CBO

1.4.2.1 Include, when available:

- PowerClerk project ID
- Participant initials (avoid full names when possible)
- Brief description of the issue

- Urgency level
- Any immediate actions already taken

Escalate issues as soon as they are identified. Do not delay if safety or zero-tolerance concerns are present.

1.4.3 Program Response and Resolution

Upon receiving an escalation:

- Energy Trust will acknowledge urgent or safety-related issues as quickly as possible, typically within one business day.

- The program may:
    - Request additional information or documentation
    - Provide guidance or mediation support
    - Pause work on a project if needed
    - Require corrective actions
    - Reassign or discontinue a project in serious cases

Trade allies are expected to cooperate fully with requests related to issue resolution, documentation and corrective action.

1.4.4 Protection from Retaliation

PSAP does not tolerate retaliation against participants, subcontractors, CBOs or trade ally staff for raising concerns in good faith. Retaliation may result in corrective action, suspension or removal from the program.

2 Program Contacts & Roles

PSAP is delivered through collaboration between Energy Trust, CBOs and trade allies. Use the contacts in this section for program questions and project support.

2.1 Program Structure

2.1.1 Energy Trust

2.1.1.1 Energy Trust Responsibilities

- Oversees program implementation and delivery
- Provides guidance on program processes, requirements and issue resolution
- Supports coordination across internal teams and external partners, manages project tracking, documentation and status updates

- Supports onboarding, system access and invoicing
- Your account manager serves as a primary point of contact for administrative and process-related questions
- Manages the call center and the PSAP mailbox PSAP@energytrust.org

2.1.1.2 Energy Trust Contact for program support

- Email: PSAP@energytrust.org or contact your account manager
- Use for general program questions, project support and escalations

2.1.2 Community Partners

Community partners support PSAP program delivery by co-creating program strategies, conducting community outreach and assisting with participant intake. The program works with three CBOs: APANO, Community Energy Project (CEP) and Self Enhancement, Inc. (SEI). These organizations bring trusted relationships, cultural expertise and direct connections to the communities PSAP serves.

2.1.2.1 CBO Responsibilities

- Conducts outreach and connect with eligible households
- Verifies participant site and income eligibility
- Supports participants throughout the program lifecycle
- Provides culturally responsive communication and navigation support
- Assists with scheduling, coordination and participant needs

CBO Contacts for participant support
Trade allies will coordinate with the assigned CBO for each project.

2.1.3 APANO

- Name: Dani Xu
- Title: Program Manager
- Email: dani@apano.org
- Office Phone: (971) 340 -1801

2.1.4 Community Energy Project (CEP)

- Name: Edidiong (Didi) Umoh
- Title: Rooftop Solar Manager
- Email: Homesolar@communityenergyproject.org
- Phone: (503) 902-8112

2.1.5 Self Enhancement Inc. (SEI)

- Name: Kylia Golden
- Title: Solar Education, Outreach & Workforce Pathway Coordinator

- Email: kyliag@selfenhancement.org
- Phone: (971) 377 - 2082

3 Trade Ally Qualifications & Requirements

3.1 Minimum Requirements

In general, trade allies must:

- Be an active Energy Trust solar trade ally in good standing
- Serve participants within the Portland service area
- Maintain the ability to provide Solar Within Reach incentives
- Demonstrate experience working with residential participants
- Demonstrate the ability to support PSAP project requirements
- Meet all licensing, insurance and certification requirements in Energy Trust's Solar Trade Ally Network and PSAP Participation Agreement.

3.2 Program-Specific Requirements

In addition to the above requirements, trade allies that participate in PSAP must meet these program-specific requirements:

- Deliver solar and solar + storage installations for homes that may require enabling repairs (e.g., roofing, electrical upgrades, structural work), with required documentation
- Serve as the general contractor for solar, storage and enabling repairs required for a project
- Provide clear, accessible communication and strong participant service for participants experiencing low incomes
- Complete required program trainings (e.g., equity, participant experience, reporting)
- Meet PCEF wage and reporting requirements for all staff and subcontractors
- Provide a minimum 7-year workmanship warranty, including labor for equipment replacement under manufacturer warranty
- Provide system monitoring or a maintenance service plan for at least 24 months
- Provide participant education, including walkthroughs, documentation and ongoing support
- Maintain active status as an Energy Trust solar trade ally in good standing
- Submit accurate and timely documentation, reporting and invoicing
- Contact your account manager to enroll in Energy Trust's Electronic Fund Transfer (EFT) system

3.2.1 PSAP Participation Agreement

Trade allies must sign a PSAP Participation Agreement with Energy Trust.

The PSAP Participation Agreement sets program terms and requirements, including:

- Program participation and coordination with CBOs
- Documentation, reporting and wage compliance
- Participant service expectations and system performance requirements
- Pricing, warranties and service obligations
- Payment structure, including milestone payments
- Suspension, termination and program eligibility

Trade allies must review and comply with the PSAP Participation Agreement. This guide provides operational guidance to support program delivery. In the event of a conflict between this guide and the PSAP Participation Agreement, the PSAP Participation Agreement will govern.

4 Onboarding Process

Before receiving project assignments, trade allies must complete all required onboarding activities. The onboarding process is designed to ensure trade allies understand program requirements, participant experience expectations, reporting obligations, payment processes, and the systems and tools used to support PSAP project delivery. Onboarding may include execution of the PSAP Participation Agreement, completion of required trainings, system access and setup, review of program resources and participation in required coordination activities.

4.1 Required Trainings

4.1.1 Training Participation & Compensation

Trade allies must participate in required PSAP onboarding and trainings, including program orientation, equity-focused training and other required sessions.

4.1.1.1 Trade allies will be compensated for participation in required onboarding and training activities as follows:

- $100 per hour per participating trade ally
- Up to $150 per hour per business when multiple staff attend the same session
- Compensation applies only to required onboarding and training activities
- Energy Trust tracks attendance
- Trade ally invoices Energy Trust monthly by the 10th of each month for trainings and activities

4.1.1.2 Eligible Activities for Compensation

Eligible activities include:

- Program onboarding sessions
- Culture of belonging experience trainings
- Required implementation trainings
- Required coordination sessions (excluding social/networking portions)

5 Participant Service and Education

Trade allies must provide strong participant service and education for each project. Trade allies must ensure participants understand the system, installation process and ongoing maintenance, with education provided at key project stages.

5.1 Design Phase

Trade allies must review the following with each participant:

- Location of solar arrays and all major equipment
- Any required relocation of vents, pipes, or existing equipment
- Any required drywall removal and repair
- Estimated system production
- Estimated utility bill offset and any fixed utility costs
- Net metering agreement, including how credits are applied and managed
- Clarification that the system does not provide backup power unless battery storage is installed
- Solar bid proposal with itemized cost breakdown on participant request
- Estimated project timeline and coordination needed for all stages or installation and repairs
- Itemized cost breakdown if requested only

5.2 Installation Phase

Trade allies must communicate the following to participants and CBOs prior to and 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) – all of which should be managed by the trade ally
- Areas of the home and property that require access
- Safety precautions for occupants, including children and pets
- Inspection timelines (AHJ and program verification)
- Net metering and system activation timeline

5.3 Final Walkthrough & System Handover

Trade allies must complete an in-person walkthrough with the participant and cover:

- 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
- Participant manual required by Energy Trust's Solar + Storage Program
- Next steps for service, warranty and support
- Connect with the project's dedicated CBO partner to confirm all participant needs have been addressed and notify them of project completion.

5.4 Ongoing Support Requirements

Trade allies are responsible for:

- Provide system monitoring or maintenance support for at least 24 months
- Respond to participant questions and system issues promptly
- Provide warranty service and equipment replacement as required

6 Project Eligibility & Trade Ally Responsibilities

PSAP projects must meet all program eligibility requirements before moving forward. Participant eligibility is determined by CBO partners – all participants must meet this first, while trade allies are responsible for confirming that project conditions align with the program-approved scope, technical requirements, incentives and installation criteria.

Trade allies do not determine participant eligibility. Work should proceed only on projects that have been reviewed and approved by the program and are in **Funds Reserved** status in PowerClerk.

6.1 Trade Ally Responsibilities

Trade allies are responsible for:

- Complete site assessments and develop project scopes per program guidelines
- Install solar, storage (if applicable) and enabling repairs (if applicable) to meet Energy Trust and PCEF requirements
- Ensure all work matches the program-approved scope
- Confirm the approved project funding level and ensure total project costs do not exceed the allocated amount by using the incentive calculator
- Report site conditions or changes that may affect scope or eligibility
- Manage subcontractors, including enabling repair work
- Verify the project meets Solar + Storage Installation Requirements and PSAP requirements listed in ***Section 10 Compliance and Reporting Requirements.***
- Meet all PCEF reporting requirements for all staff and subcontractors on the project

6.2 What Trade Allies Should Not Do

Trade allies should not:

- Determine or communicate participant eligibility or income tier
- Submit PSAP projects directly into PowerClerk Residential program that haven't gone through the PowerClerk Leads program.
- Make commitments regarding funding amounts or program approval
- Perform work outside of an approved scope
- Proceed with installation prior to required approvals
- Accept participant payments for the project. External funding sources to cover up to the total cost of the system is acceptable but must be reported and approved by the program team. All eligibility-related questions from participants must be directed to the program team or assigned CBO.

6.3 Scope Changes & Approvals

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 and cost impacts)

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

7 Lead Assignment & Project Acceptance

PSAP assigns projects to support equitable distribution, align with participant needs and promote timely delivery. Projects will be assigned and visible to each trade ally in the Portland Solar Access Program Leads PowerClerk program in Trade Ally Assigned status.

7.1 Trade Ally Capacity

Trade allies are expected to:

- Share capacity updates with Operations Support at PSAP@energytrust.org
- Accept projects within stated capacity
- Notify the program if capacity to maintain participant leads changes

7.2 Project Acceptance Requirements

Once a project is assigned, trade allies must:

- Contact the participant within **2 business days**
- Make at least **3** contact attempts (phone, email, or other method). If the participant is unresponsive, notify the assigned CBO on the project for support
- Begin scheduling the site assessment
- Notify the program and CBO partner when contact is made and initial site assessment is scheduled

7.2.1 Declining a Project

Trade allies may decline a project only if:

- They do not have sufficient capacity
- They are unable to meet specific project requirements
- Trade allies must notify the program promptly when declining a project.
- Projects should not be declined based on preference alone.
- Repeated declines or failure to accept assigned work may impact eligibility to receive future project assignments.

7.3 Project Reassignment

The program may reassign a project if:

- The participant requests a different trade ally
- Scheduling or communication delays occur
- Project needs are not being met
- The trade ally was terminated from the PSAP program

The program will coordinate reassignment as needed to support participant experience and project success.

8 Project Payments & Invoicing

PSAP uses milestone-based payments to support delivery while ensuring quality and accountability.

8.1 Payment Structure

Payments for PSAP projects are issued in two stages:

1. **Initial Payment (Milestone Payment)**

- Pay 50% of total approved project incentives when the project reaches **Funds Reserved** in PowerClerk
- Includes solar, storage (if applicable) and enabling repairs
- Supports equipment procurement, permitting and early project costs

2. **Final Payment**
   - Adjust the final payment for approved cost changes based on installation
   - Pay the remaining balance after installation
   - All PSAP projects are required to be verified on-site after final payment

Final payment will be made once all the following are complete:

- Installation is complete including storage and enabling repairs when applicable
- Final invoice is submitted and approved
- Wage requirements have been submitted to the program team
- As-built drawings and enabling repair documentation are submitted (if applicable)
- All project costs are reconciled, including any co-funding or external incentives

8.2 Requirements after Final Payment

- All PSAP projects require on-site verification
- Trade allies must complete any corrections identified during verification
- Additional project allocations may be held until corrections are completed

8.3 Milestone Payment Conditions

- Contact your account manager to enroll in Energy Trust's EFT system
- Milestone payments are limited to 10 active PSAP projects
- If a project is canceled after a milestone payment, funds may be reassigned or may require repayment if program requirements are not met
- No milestone payment will be issued for work completed on projects that do not reach Funds Reserved status in PowerClerk due to cancelation or ineligibility.

8.4 Participant Contracts

Trade allies must have a contract in place with the participant for each PSAP project, but they are not required to submit contract templates or copies to Energy Trust as part of onboarding or the standard process. Energy Trust may request and review participant contracts at any time for compliance, quality assurance or audit purposes.

8.5 Invoicing Requirements

Trade Allies must submit a final revised invoice after installation that reflects actual project costs prior to final payment

Invoices must include the following. See also [Sample Invoice]:

Item	Action
Residential Powerclerk Project ID	Include project verifier – do not include any participant details
Invoice Date and Invoice Number	Clearly indicate the date that the invoice is issued and the invoice number
Measure-by-Measure Line-Item Costs	Clearly separate all **Renewable Energy Upgrades** (e.g. solar, storage, electrical panel upgrades) from **Enabling Repairs** (e.g. roof repair, unsafe wiring) Itemized costs, separated by: ○ Solar installation ○ Electrical panel upgrade ○ Storage (if applicable) ○ Each Enabling repair
External funding and/or incentives	List any external funding not coming from PSAP that will decrease the total project cost. Specify the source and amount of each associated to a measure. This should be listed on the invoice as a discount.
Milestone Payment (if applicable)	Include the amount that was paid as a milestone payment, if applicable.
Final Amount Due	Clearly show the final **amount due** after all milestone payments, incentives, approved project cost adjustments and external funding is applied to the project cost.

Trade allies must ensure all submitted costs align with the approved project scope and pricing structure.

8.6 Important Payment Expectations

- Only approved-scope work is eligible for payment
- No payments may be made out of the participant's pocket.
- Get approval for scope changes before completing the work
- Incomplete or inaccurate documentation may delay payment
- Payments are issued to the trade ally, including enabling repair costs

8.7 Key Notes

- Follow the pricing structure submitted in the RFQ and report major changes to the program
- Submit updated documentation for review and approval if project costs change

9 Systems & Tools

PowerClerk is the primary system for PSAP leads, submissions, documentation, status tracking and milestone progression. All required reporting will be submitted via email to PSAP@energytrust.org. Trade allies may also use email or other program-designated tools as directed.

9.1 Program Systems

Trade allies will use program systems to:

- Receive and manage assigned projects
- Submit scopes of work and required documentation
- Track project status and milestones
- Support quality assurance review and verification
- Submit required reporting and invoicing documentation

9.2 Trade Ally Responsibilities

Trade allies are responsible for:

- Maintaining accurate project information
- Uploading required documentation on time
- Keeping project status current
- Using program systems for required submissions (scope, reporting, invoicing)

9.3 System Access & Training

Trade allies will receive system access and training during onboarding.
Trade allies must:

- Complete required system trainings
- Email PSAP@energytrust.org to ensure relevant staff have access to required systems
- Follow all system-related processes and submission requirements

9.4 System Support

For system access issues or technical questions:

- Contact the program team or designated support contact

- Report issues promptly to avoid delays in project progress or payment

9.5 PowerClerk Submission Requirements

Trade allies must submit a complete and accurate application package in PowerClerk for all PSAP projects. A complete submission is required for the project to proceed to design review and **Funds Reserved** status.

9.5.1 Required Application Documentation

Trade allies must submit the following in the Residential Program in PowerClerk at the time of application submission:

- System design documentation (e.g., one-line diagram, physical layout and solar resource assessment), required
- Completed milestone payment incentive calculator with itemized costs (required)
    - The same incentive calculator document can be resubmitted from the Leads program if no changes have been made
- Enabling repair scope and supporting documentation (if applicable). Documentation must include the following for each repair:
    - Scope of work
    - Contractor performing the work
    - Estimated cost
    - Photos of existing conditions
- Solar + Storage Incentive Agreement 220R-PSAP with income attestation (required)
    - Signed by the participant through DocuSign in PowerClerk
- All eligible workers, wages, and subcontractors must be registered before starting work on PSAP projects. Register new workers and wages by submitting the Workforce Registration Form to PSAP@energytrust.org.

Trade allies must submit the following in the Residential Program in PowerClerk after installation is complete:

- Any updated as-built documentation related to system design (if applicable)
- PSAP final project invoice (required)
    - Must include enabling repairs, if applicable
- All wage requirements for this project must be submitted to PSAP@energytrust.org prior to submitting the notice of project installation (required)submitting the notice of project installation (required)

Trade allies must attest that all workers, wages and subcontractors have been reported to PSAP@energytrust.org prior to submitting the Notice of Project Installation. Upon final payment approval, trade allies must submit eligible worker hours and subcontractor dollars using the Project Reporting Template to PSAP@energytrust.org. Any adjustments to costs after Funds Reserved should be reviewed and approved by the program team by emailing PSAP@energytrust.org. Final costs will be captured in the project invoice and the final payment will be adjusted based on any cost adjustments.

9.5.2 Enabling Repair Documentation Requirements

Some PSAP projects require enabling repairs for safe, successful installation of solar or solar + storage.

Eligibility, documentation, budget and approval requirements are in the PSAP Enabling Repairs Guide.

If enabling repairs are included in the project scope, trade allies must submit the required Enabling Repair Documentation Form that clearly defines the work and associated costs. Required documentation includes:

- Detailed scope of work describing the repair
- Itemized cost estimate
- Supporting photos of existing site conditions
- Any relevant contractor or subcontractor reporting documentation

Enabling Repair Documentation Template will be used for program review and approval prior to project advancement.

9.5.3 Important Notes

- All documentation must accurately reflect the proposed project scope and system design
- Incomplete or inaccurate submissions may delay project approval and payment
- Trade allies are responsible for ensuring all required documentation is submitted and up to date

10 Compliance & Reporting Requirements

10.1 PCEF Wage Compliance

Trade allies are responsible for ensuring all PSAP work complies with PCEF wage requirements, maintaining required documentation and submitting applicable reports to Energy Trust. This applies to all workers on the project site, including employees and subcontractors, and excludes administrative staff.

10.1.1 Wage Requirements

- Pay all applicable workers at or above the PCEF wage or prevailing wage requirement, whichever is higher for the project.
    - PCEF wage requirement: **180% of the Oregon state minimum wage** as it applies to Portland (updated annually on July 1). See: BOLI : Oregon Minimum Wage : For Workers : State of Oregon
    - Prevailing wage requirement: Varies based on the type of work performed. Please contact the program team to confirm whether applicable.

10.2 Records and Audits

- All trade allies and their subcontractors must maintain payroll records for a minimum of 6 years after the end of the project. Examples of documentation to be retained include, but are not limited to, employee timecards, official payroll documentation or reports (i.e., generated in a payroll program) and *IRS Form 941: Employers Quarterly Federal Tax Return*.
- PCEF, either directly or through a designated representative, may examine and make copies of trade ally and subcontractor books, documents, papers and records related PSAP-funded work at any time upon 30-day notice.
- Energy Trust may examine, audit and make copies of trade ally and subcontractor books, documents, papers and records related to PSAP-funded work at any time, provided that Energy Trust gives at least two (2) business days' prior notice. . Copies of applicable records shall be made available upon request to ensure compliance with workforce wage and reporting requirements.
- Trade allies are responsible for informing subcontractors of all requirements in this section related to wage record retention and examination.

10.3 Reporting Activities

Trade allies must submit accurate, timely reporting to support compliance with PCEF requirements.

10.3.1 Trade Ally Business

- Submit required business information for PCEF reporting using the Workforce Registration Form.
- Complete this form during onboarding with your account manager.
- Business details are submitted once unless changes occur; report changes to PSAP@energytrust.org.

10.3.2 Trade Ally Staff & Wages

- Register all workers paid on the project (excluding office staff). Subcontractor worker registration may also be required; see ***Section 10.3.5, Trade Ally Subcontractor Staff and Wages***.
- Register workers before they begin work on a PSAP project using the Workforce Registration Form.
- Assign each worker a Unique ID (format provided in the form). Do not report worker names to PCEF; track names and Unique IDs internally.
- Report the take-home hourly wage (excluding benefits) at registration and ensure it meets PCEF minimum wage requirements.
- Register each worker once; report wage changes as soon as possible to PSAP@energytrust.org to ensure compliance.

10.3.3 Trade Ally Subcontractor Business and Eligibility

- Register all subcontractor businesses paid on PSAP projects.
- Submit subcontractor business information before they begin working on a PSAP project using the Workforce Registration Form (once unless changes occur).
- You may register subcontractors directly or provide the form and instructions for them to submit to PSAP.
- Ensure all subcontractor reporting is complete and accurate.

10.3.4 Trade Ally Subcontractor Payments

- Trade ally payments to subcontractors are reported on the final project invoice and in the Project Reporting Template for completed projects. All trade ally payments to subcontractors must be reported, including payments less than $5,000.

10.3.5 Trade Ally Subcontractor Staff & Wages

- For subcontractors receiving more than $5,000 on a project:
    - Subcontractor workers must be registered using Unique Worker IDs.
    - Wages must comply with PCEF requirements.
    - Provide subcontractors the Workforce Registration Form and instructions to register Unique IDs and wages directly with PSAP.
    - Worker hours must be reported monthly for installed projects.
    - Trade allies are responsible for collecting, tracking and reporting subcontractor hours and total dollars paid
- Subcontractors receiving $5,000 or less on a project are exempt from worker registration and hours reporting; however, for all projects trade allies must:
    - Agree to pay workers the PCEF minimum wage
    - Agree to random payroll audits, and
    - Require the same compliance from their subcontractors

10.3.6 Eligible Staff Hours on Each Project

- Report all workers and eligible subcontractor worker hours only for installed projects. Two PowerClerk email communications will indicate when project hours are reportable: after installation and after verification if changes are required. See table below for a full list of which roles are required to provide reporting.
- Report total hours by Unique Worker ID and PowerClerk Project ID.
- Submit hours using the Project Reporting Template.

Report hours monthly by the **10th** of each month to PSAP@energytrust.org.

<table>
<tr><td>Required to report</td><td>Site assessors
Installers
Specialty or other trade installers
Laborers
Project or construction managers – On jobsite
Other staff directly involved in PCEF-funded jobsite installation activities
Staff of subcontractors performing PCEF funded jobsite installation activities</td></tr>
<tr><td>Not required to report at this time</td><td>Administrative staff
Staff not directly involved in PCEF-funded installation activities
Staff performing work not funded by PCEF (even if on the same job)</td></tr>
</table>

10.3.7 Method for Reporting

- Email approved templates to PSAP@energytrust.org. PSAP will compile and submit quarterly reporting to PCEF.

<table>
<tr><th>Reporting Activity</th><th>Approved Template</th><th>Reporting Method</th></tr>
<tr><td>Trade Ally Business</td><td rowspan="4">Workforce Registration Form</td><td rowspan="5">Email workbook as attachment to PSAP@energytrust.org</td></tr>
<tr><td>Trade Ally Staff and Wages</td></tr>
<tr><td>Tade Ally Subcontractor Business</td></tr>
<tr><td>Trade Ally Subcontractor Staff and Wages</td></tr>
<tr><td>Trade Ally Subcontractor Payments</td><td></td></tr>
</table>

Eligible staff hours on each project	Project Reporting Template	

10.3.8 Cadence

- Report workforce updates as they occur. This includes new workers/subcontractors and any changes to previously reported workers/subcontractors.
- By the **10th** of each month, submit reporting for projects completed in the prior month.
- Account managers confirm PowerClerk project IDs for completed projects in the reporting period.
- Late or inaccurate reporting may delay payment and may result in corrective action.

<table>
<tr><th>Reporting Activity</th><th>Due</th><th>Cadence</th></tr>
<tr><td>Trade Ally Business</td><td>At onboarding</td><td rowspan="4">One-time, unless changes occur</td></tr>
<tr><td>Trade Ally Staff and Wages</td><td rowspan="2">Before starting work on their first PSAP project</td></tr>
<tr><td>Trade Ally Subcontractor Business</td></tr>
<tr><td>Trade Ally Subcontractor Staff and Wages</td><td>Before starting work on their first PSAP project, if the subcontractor will be paid more than $5,000</td></tr>
<tr><td>Trade Ally Subcontractor Payments</td><td rowspan="2">By the 10th of each month for projects installed in the month prior</td><td rowspan="2">Monthly</td></tr>
<tr><td>Eligible staff hours on each project</td></tr>
</table>

10.4 Equipment Requirements

All PSAP projects must meet Energy Trust and PSAP installation requirements and applicable program standards.

10.4.1 General Equipment Requirements

Trade allies must:

- Install equipment in accordance with Energy Trust Solar + Storage Design & Installation Requirements and applicable codes

- Ensure all equipment is installed per manufacturer specifications and program guidelines
- Verify that all equipment meets eligibility requirements prior to installation

10.4.2 Domestic Content Requirement

Trade allies shall install renewable energy products (solar modules, inverters and energy storage systems) that are manufactured in the United States.

- 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

10.4.3 Approved Equipment & PowerClerk

- PowerClerk contains a list of approved equipment for PSAP projects that meet the domestic content requirements and the Solar + Storage installation requirements
- Trade allies must select equipment from the approved list when submitting project

If equipment is not listed:

- Trade allies must contact their account manager prior to purchase
- Equipment must be reviewed and approved before it can be added to PowerClerk and used on a project

10.4.4 Exceptions to Domestic Content Requirement

An exception may be requested 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%

Trade allies must:

- Submit a written request to PSAP@energytrust.org
- Include all relevant details, justification and proposed alternative equipment
- Receive approval **before** purchasing or installing alternative equipment

10.5 Battery Storage Requirements

Batteries will be installed on select PSAP projects, based on CBO partner recommendations and subject to Energy Trust approval. All battery storage systems must meet Energy Trust Battery Storage Incentive Eligibility Requirements. Trade allies are responsible for verifying that all battery systems meet eligibility requirements prior to installation.

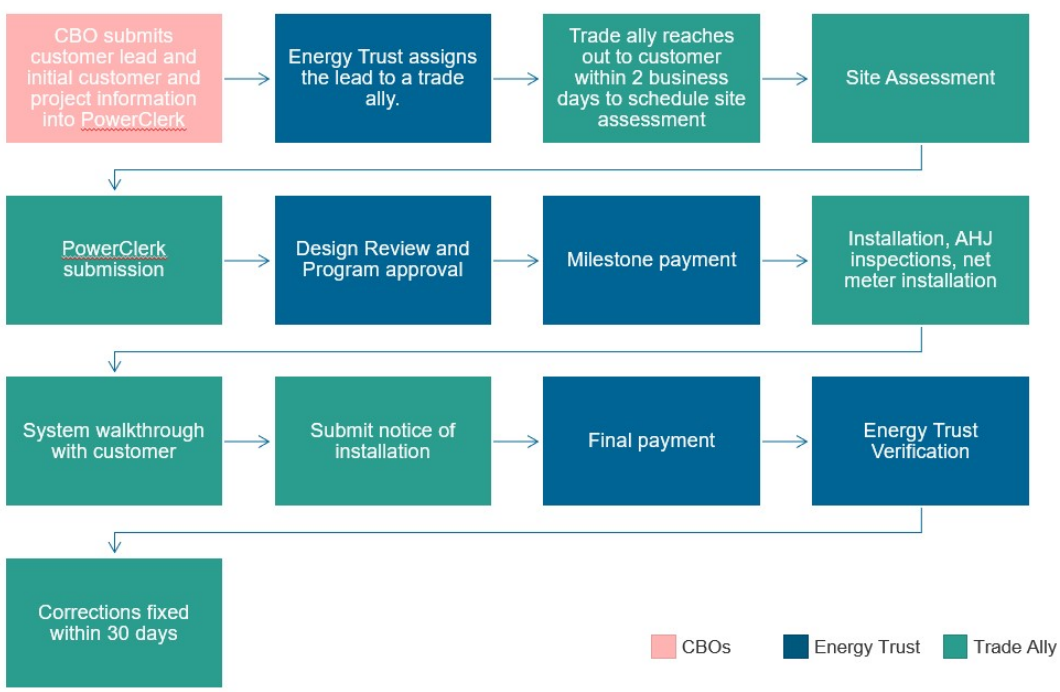
11 Project Workflow

Prior to trade ally assignment, the following steps typically occur:

- The CBO completes participant intake
- The CBO may conduct an initial virtual roof assessment if there are concerns regarding solar suitability, TSRF eligibility or project planning
- The CBO confirms the participant is ready to move forward

Once eligibility and initial project readiness are confirmed, the project is assigned to a trade ally by Energy Trust.

PSAP projects follow a standard workflow from assignment through closeout. Trade allies must complete each phase per program requirements and timelines.



1. Lead Assignment & Project Acceptance (See Section 7)

2. Site Assessment & Scope Development (See Section 6.1 & Section 5.1)

3. PowerClerk Submission Requirements (See Section 9.5)

4. Project Approval & Funds Reserved (See Section 8.1)

5. Installation (See Section 5.2)

6. Installation Completion & Final Payment (See Section 5.3 & Section 8.1)

7. Verification & Closeout (See Section 8.2 & Section 10.2)

Successful delivery of PSAP projects depends on clear communication, adherence to program requirements and strong coordination between trade allies, CBOs and the program team. Trade allies are expected to follow the processes outlined in this guide and reach out to the appropriate contact when questions or issues arise. Continued collaboration and responsiveness will help ensure a positive experience for participants and successful program outcomes.

12 Revision Tracker

Date	Summary of Changes
7/9/2026	Final version posted on the Insider
7/14/2026	Updated table in Section 10.3.6 to clarify who is required to report hours.