



Solar + Storage Design & Installation Requirements

Developed by Energy Trust of Oregon

V 21.0

Acknowledgments

Energy Trust would like to acknowledge the stakeholder feedback provided by Trade Allies and industry experts in the report compiled by Cadmus in January 2022.

Revisions

Energy Trust updates these installation requirements regularly. Many thanks to the industry members and technical specialists that have invested their time to help keep this document current. Revisions from the previous version are summarized in the table below.

May 2023 Revisions

Section	Revision
1.0	Added battery energy storage system to the equipment covered in the Installation Requirements
1.0	Added "The goal of Energy Trust's funding is to support reliability, resilience, and the integration of renewable resources within the distribution systems in Oregon" to explain the additional focus area that has been added to Energy Trust from House Bill 3141
2.1.4	Added "PowerClerk project record includes electronic manual, if applicable" for Trade Allies that opt for providing an electronic customer manual
2.1.4	Added language to emphasize the process for project revisions "f. Final PowerClerk project record accurately reflects the system as installed and all project/design revisions"
2.1.5. A	Added "battery" to "energy storage systems" for more clarity
2.1.5. H	Added "all other generation and energy storage, backup generator, hydropower, and electrical subpanels" to the list of components that should be included in the physical layout diagram
2.1.6	Added "energy storage, backup generator, hydropower and electrical subpanels" to the list of components that should be included in the physical layout diagram
2.3.4. A	"IEEE 929 and 1374" have been removed to reflect updates in standards
2.3.4. D	Added "Photovoltaic mounting systems for solar trackers and clamping devices used as part of a grounding system shall be listed to UL 3703 or successor standard." to reflect updates in UL standards
2.3.4. E	Updated section 2.3.4. d and moved to 2.3.4 e, including removal of the wording "except with program pre-approval" so the UL9540 listing is required for battery energy storage systems, which aligns with the International Residential Code, International Building Code, International Fire Code, and NEC
2.3.4 F	Added this section to refer to appropriate standards for batteries
2.3.6	Added language about warranties for clarity including specifying expectation that PV modules should have warranties of 10 years against manufacturer's defects. Clarified that Energy Storage Systems also include battery storage systems.
2.3.9	Removed "combiner or feed-through junction boxes" because this is covered by "accessible for maintenance"
2.3.10. B	Removed OESC 690.56(B) to reflect updates in the code
2.3.10. C	Removed "Pull-out style disconnects shall not be used" since it no longer applies to modern inverters
2.3.10. D	Removed requirement for microinverters to include a rooftop AC disconnect since manufacturers have listed their connectors as disconnects

2.3.14.	Removed reference to DC grounding electrode conductor (GEC) because a GEC on the roof is no longer required. Other revisions to reflect updates in code
2.3.19	Added “batteries and energy storage systems” to the equipment that should be installed according to manufacturer’s specifications
2.3.20	Included AC Modules in system monitoring
2.4.4	Added “Flashing systems listed and labeled to UL 2703A shall meet the requirements of this section when installed according to their listed installation instructions” to match the industry standard for flashing
2.5.1	Removed “sun chart” as this is no longer commonly used
2.9	Added section to separate the requirements for battery energy storage systems using a hazardous electrolyte (lead acid)
3.1.1	Included the requirement for a label
3.1.2	Change allows for delivery of an electronic manual in certain circumstances

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1.0 Purpose

This Solar + Storage Design & Installation Requirements document details the requirements and minimum criteria for a solar electric (“photovoltaic” or “PV”) system (“System”), or Battery Energy Storage System (“battery” or “BESS”) installed by a Solar Program trade ally under Energy Trust's Solar Program (“Program”).

The purpose of these installation requirements is to help promote the performance and longevity of systems that receive Energy Trust incentive funding. The goal of Energy Trust's funding is to support reliability, resilience, and the integration of renewable resources within the distribution systems in Oregon. Energy Trust reserves the right to require compliance with installation specifications that may exceed manufacturer or code requirements. Any variations from the Program's installation requirements shall receive prior approval from Energy Trust.

2.0 System Requirements

2.1 General

- 2.1.1 System shall be grid-connected and installed on real property in Oregon that receives electrical service directly from Portland General Electric or Pacific Power.
- 2.1.2 System shall meet local utility interconnection and net metering requirements, if applicable.
- 2.1.3 The installation shall be of industry standard and workmanlike quality.
- 2.1.4 System design shall be documented with a complete PowerClerk project record and incentive agreement that accurately describes the project participants and system design, including:
 - a. Incentive agreement signed and dated by authorized signatory
 - b. Incentive agreement Solar Electric System Summary generated with current version of system design
 - c. PowerClerk component description that lists manufacturer and model number of all system components (module, inverter, energy storage system (ESS), battery, etc.) for current version of system design
 - d. PowerClerk component description shows correct tilt and orientation for each solar array
 - e. PowerClerk project record specifies correct utility for the project site
 - f. PowerClerk project record includes electronic customer manual, if applicable
 - g. Final PowerClerk project record accurately reflects the system as installed and all project/design revisions
- 2.1.5 System design shall be documented with a schematic diagram that accurately describes all electrical components to be installed (e.g., modules, inverters, energy storage systems (ESS), disconnects, and meters) and the wiring design. Diagram should include:
 - a. Manufacturer and model number of all system components (module, inverter, battery energy storage system (ESS), battery, etc.)
 - b. Module series/parallel wiring

- c. Wire run from array to point of utility interconnection, including applicable sub-panels, with pre-existing wiring or sub-panels used in the AC run clearly labeled
 - d. Conductor and ground wire types and sizing
 - e. Conduit types and sizing
 - f. Voltage drop calculations
 - g. AC and DC breaker sizing
 - h. All other generation and energy storage equipment on site
- 2.1.6 System design shall be documented with a physical layout diagram that accurately describes locations of major system components. Diagram should include:
- a. Layout of roof or installation location including existing obstructions
 - b. Tilt and orientation for each solar array
 - c. Locations of installed modules, inverter(s), and energy storage systems
 - d. Locations of all other generation and energy storage equipment on site (photovoltaic, backup generator, hydropower, wind components, etc.)
 - e. Locations of submitted TSPF measurement(s)
 - f. Locations of all applicable electrical panels, subpanels, meters and disconnects
- 2.1.7 System shall be properly permitted, inspected, and in compliance with all applicable building and electrical codes.
- 2.1.8 System equipment installers shall be licensed according to the Oregon Building Codes Division and shall be working for a contractor that is licensed according to the Oregon Construction and Contractors Board.

2.2 Materials

- 2.2.1 Materials used outdoors shall be sunlight/UV-resistant and listed for outdoor locations.
- 2.2.2 Materials used shall be designed to withstand the temperatures to which they are exposed.
- 2.2.3 Dissimilar metals that have galvanic action (such as aluminum and copper) shall be isolated from one another using industry standard practices (such as properly rated grounding lugs).
- 2.2.4 Aluminum shall not be placed in direct contact with concrete materials.
- 2.2.5 Fasteners used to secure modules and racking equipment shall be stainless steel. For substructure components, only high-quality fasteners shall be used (stainless steel is preferred). Stainless steel bolts shall be coated with an anti-seize lubricant to prevent galling and allow for removal during system maintenance or repair.
- 2.2.6 Structural members shall be either:
- a. Aluminum
 - b. Hot-dip galvanized steel per ASTM standard A123 equivalent or better
 - c. Coated or painted steel (not allowed in marine environments)
 - d. Stainless steel (recommended for marine environments)
 - e. Pre-approved nonmetallic material (nonmetallic mounting systems listed to the UL 2703 standard may be submitted for application review without pre-approval)

- f. Outdoor rated pressure treated lumber or laminated beams:
 - i. Shall be installed using roofing flashing methods to prevent water pooling and UV exposure on top surface.
 - ii. Shall not be installed in direct contact with roofing material, soil, or where exposed to extended periods of pooled water.

2.2.7 For a residential, roof-mounted array, rails used for mounting modules shall be aluminum or stainless steel.

2.3 Equipment and Installation

2.3.1 All installed system components shall be new.

2.3.2 All components shall be mounted securely.

2.3.3 All building penetrations shall be sealed and fire resistance maintained:

- a. To prevent intrusion by insects, vermin, or weather, all penetrations to building shell (walls, etc.) resulting from the installation of the solar system shall be permanently sealed with appropriate water and pest-proof materials.
- b. Any penetrations through fire-rated assemblies shall be sealed and shall not reduce the fire resistance required by local codes and standards.

2.3.4 All electrical equipment shall meet appropriate current electrical standards and shall be listed by a nationally recognized testing laboratory (e.g., UL, ETL)

- a. Inverters shall meet IEEE 1547 (listed to UL 1741 SA) or their successor standards and shall be certified by the [California Energy Commission](http://www.gosolarcalifornia.ca.gov/equipment/inverters.php)¹.
- b. Photovoltaic modules shall meet IEEE 1262 (listed to UL 1703) or their successor standards and shall be certified by the [California Energy Commission](http://www.gosolarcalifornia.ca.gov/equipment/pv_modules.php)².
- c. Photovoltaic mounting systems and clamping devices used as part of a grounding system shall be listed to UL 2703 or successor standard.
- d. Photovoltaic mounting systems for solar trackers and clamping devices used as part of a grounding system shall be listed to UL 3703 or successor standard.
- e. Energy Storage Systems shall be listed to UL 9540 or successor standards and shall be certified by the California Energy Commission, except with program pre-approval.
- f. Batteries shall be listed to UL 1973 or successor standards and shall be certified by the California Energy Commission, except with program pre-approval.

2.3.5 All listed and/or labeled electrical equipment shall be installed and used as shown in the included manufacturer instructions and these Installation Requirements.

2.3.6 Manufacturer warranties shall cover:

- a. Inverter for a minimum of 5 years against manufacturer's defects.
- b. PV modules for a minimum of 10 years against manufacturer's defects and 20 years against degradation of performance below 80% of original output under standard test conditions.

¹<http://www.gosolarcalifornia.ca.gov/equipment/inverters.php>

²http://www.gosolarcalifornia.ca.gov/equipment/pv_modules.php

- c. Energy Storage Systems (ESS) and battery storage systems for a minimum of 10 years against manufacturer's defects.
- 2.3.7 All electrical equipment shall be listed for the voltage and current ratings necessary for the application.
- 2.3.8 Equipment shall not be modified such that it voids the listing or manufacturer warranty.
- 2.3.9 All required over-current protection shall be included in the system and accessible for maintenance. The inspection or maintenance shall not require the removal or displacement of modules or other obstructions.
- 2.3.10 Means of disconnection shall be provided at the inverter(s) such that the inverter(s) can be safely isolated from all sources of power (DC input and AC output circuits) for service or in an emergency and:
- a. To allow the inverter electronics to be removed for service, disconnect switches shall be physically separable from the inverter chassis containing the main power electronics.
 - b. To allow safe, quick operation, the means of disconnection shall be at the location of the inverter or—for AC disconnection only—within sight of the inverter with permanent signage providing the location of the disconnect.
 - c. Disconnect switches shall be listed and designed for load-break operation (e.g., blade-type or circuit breaker).
- 2.3.11 All electrical terminations shall be torqued to specification, secured, and strain-relieved as appropriate. Wire ends shall be coated with terminating compound prior to termination to prevent loosening of the connection over time.
- 2.3.12 All cables, conduit, exposed conductors, and electrical boxes shall be secured and supported according to code requirements and in accordance with their performance ratings (i.e., NEMA). It is recommended that high current carrying conductors 4 AWG and larger be megohm tested to confirm integrity of insulation.
- 2.3.13 Conduit used for DC conductors shall be electrical metallic tubing (EMT). Flexible steel conduit or metal clad (MC) cable may be used as an alternative where allowed by the Oregon Electrical Specialty Code (OESC). PVC conduit may be used below grade, and above grade in marine climates where approved by the local jurisdiction.
- 2.3.14 Array equipment grounding conductors (EGC) and DC grounding electrode conductors (GEC) shall be copper and shall be either minimum 6 AWG or protected from physical damage and sized to conform to the Oregon Electrical Specialty Code (OESC):
- a. Equipment grounding conductor (EGC) shall be sized and protected according to OESC 690.45.
 - b. Grounding electrode conductor (GEC) shall be sized and protected according to OESC 690.47(B).
- 2.3.15 Twist-on wire connectors shall not be used on DC conductors or ground wires. Instead, these wire connections shall be made using terminal strips in combiner boxes, feed through blocks in junction boxes, or other similar mechanical wire splicing devices. When outdoors or exposed to moisture, twist-on wire connectors used for AC connections shall be listed for usage in a damp/wet location.

- 2.3.16 Junction boxes and combiner boxes shall be listed and suitable for their environment and conditions of use. Boxes used in damp or wet locations shall have water-tight or properly flashed covers, screw holes and conduit connections.
- 2.3.17 Permanent, UV-resistant labels with engraved, stamped or printed text (i.e., not hand-written) shall be applied to system components where signage is required by the Oregon Electrical Specialty Code. When required, inverter disconnect label shall be placed on or near the disconnect box and not on the inverter chassis so that the label stays with the system if an inverter is sent to the manufacturer for repair.
- 2.3.18 Readily accessible disconnect switch covers (not switch handles) shall be secured closed for safety (i.e., padlock, zip tie, etc.). Because this may interfere with access during an inspection, the means to secure the cover plate may be left with the customer with instructions for use.
- 2.3.19 Inverters, batteries, and energy storage systems shall be installed according to manufacturer's specifications and:
- Shall not be installed in an unconditioned attic.
 - Shall not be installed with direct sun exposure that will impact its performance (i.e., on a wall with an azimuth between 120° and 300°, unless permanently shaded between the hours of 12:00pm and 5:00pm).
 - Shall be installed in an accessible location.
- 2.3.20 Microinverters and AC Modules shall include the installation of manufacturer-provided equipment that allows local monitoring of system performance and identification of inverter errors.
- 2.3.21 Where PV source and output circuits are installed in readily accessible locations, circuit conductors shall be guarded or installed in a raceway.
- Note: Guards typically include close fencing of the entire array of sufficient height to render the area inaccessible or installation of materials to the mounting structure intended to screen and protect the conductors. If close fencing is installed the fence shall be minimum 5-feet high with a secured gate except with prior program approval.*
- 2.3.22 For hybrid systems utilizing wind or micro-hydro turbines in addition to PV, battery overcharge protection using turbine regulation and/or diversion controller and diversion load shall be installed.

2.4 Array Mounting

- 2.4.1 If roof-mounted, the roofing material shall have at least 10 years of useful life remaining to ensure the roof will not need repair or replacement early in the System's operational life. If in question, evidence of this requirement may be met by providing either a copy of a recent roof inspection or a receipt showing the date of the most recent roof replacement.
- 2.4.2 If roof-mounted, the roof system shall be capable of handling additional load of the System. Augmentation of the structure may be required by building codes.
- 2.4.3 Array racking and mounting systems shall be engineered and installed to meet local wind, snow and seismic load requirements.
- 2.4.4 All roof penetrations shall be made watertight using roofing industry-standard methods of flashing that protect the warranty of the roof. Sealant compounds used shall be appropriate for the roofing material and application and shall not be the sole method of waterproofing. Flashing systems listed and labeled to UL 2703A shall meet the

requirements of this section when installed according to their listed installation instructions.

Note: For asphalt shingle roofs this shall be accomplished with the use of some type of flat metal flange that extends around a penetration and is installed completely under shingles on the upslope side of a penetration, with the flange extending beyond the headlap of the roof covering. The bottom flange should then overlap the shingles on the downslope side (adapted from 2014 NRCA roofing manual).

- 2.4.5 All mounting hardware shall be installed according to manufacturer specifications and these Installation Requirements.

2.5 Solar Access

- 2.5.1 Solar resource shall be measured and correctly documented with an Energy Trust approved shading analysis tool according to Energy Trust requirements. A list of approved shading analysis tools are available on the Energy Trust [Solar Trade Ally Forms & Resources webpage](#)³.

- 2.5.2 Total Solar Resource Fraction (“TSRF”) shall be calculated for each site and meet the following requirements based on the measurement tool used:

- a. On-site shade analysis: TSRF of 75% or greater at all points on the array for string inverters. Projects may include individual modules with a TSRF of less than 75% if the modules are electrically isolated from one another using microinverters or other pre-approved technology; however, those modules that do not meet the 75% requirement will not be eligible for program incentives.
- b. Remote Shade analysis: Each plane of the array(s) have a TSRF of 80 percent or greater to be eligible for incentives. Trade allies must submit a solar resource evaluation using an approved remote site analysis tool. For detailed instructions on using these tools and displaying the required information, please refer to the Energy Trust solar program website.
- c. For systems over 25kW in size minimal inter-row shading may be permissible with the Program’s pre-approval.

- 2.5.3 It is recommended that the System be installed for optimal annual performance and in an aesthetic manner that blends in with the building architecture. Small trade-offs in system performance due to sub-optimal tilt and orientation can greatly enhance the aesthetics of the installation and thereby increase long term public support for solar.

2.6 Performance

- 2.6.1 Array shall be sized to operate within the current, voltage and power limits approved and warranted by the inverter manufacturer and shall not exceed 135% of inverter output power rating based on the DC nameplate capacity of the modules at STC. The temperature-adjusted array voltage shall remain within the inverter limits at the extreme high and low temperatures expected at the installation site. Where available and appropriate, ASHRAE dry-bulb design temperatures may be used (use the 0.4% high temperature and extreme mean minimum temperature). In areas where ASHRAE data is not available (e.g., at higher elevations), historical record high and low temperatures should be used.

³<https://insider.energytrust.org/programs/solar/forms-and-resources>

At mid-day, module temperatures are typically much higher than ambient conditions. When calculating voltage at the extreme high temperature, use the appropriate adder from Table 1. Systems on a roof that are tilted up 10° or more from the roof plane may be considered “Rack” mounted.

Table 1. Temperature Adders for High Temperature Voltage Calculation

Array Mounting	Temperature Adder
Roof	35 °C
Rack	30 °C
Pole	25 °C

- 2.6.2 Wires shall be sized to keep voltage drop at or below 2% in the DC conductors from the array to the inverter. Voltage drop will be calculated using temperature-adjusted V_{mp} (max power voltage) of the array for the location’s average high temperature adjusted with the temperature adders in Table 1 above.
- 2.6.3 Wires shall be sized to keep voltage drop at or below 2% in the AC conductors from the inverter to the point of connection. Example points of connection include the distribution panel that contains the main service disconnect(s), a supply-side tap, a pre-existing sub-panel with other loads, a generator transfer switch, or a switchgear.
- 2.6.4 AC voltage at the inverter shall be within the inverter’s operating limits. At locations where utility service is higher than typical voltage, this may require a larger AC wire size or a shorter AC run than allowed under **Section 2.6.3** to minimize voltage rise between the point of utility interconnection and the inverter.
- 2.6.5 Voltage mismatch caused by partial shading of the array, different orientations of strings within the array and by variations in module voltages shall be minimized, allowing the inverter to operate within its maximum power point window. Modules in a single string shall be installed at the same tilt and orientation or with no more than 10° variation.
- 2.6.6 Each solar system shall be completed in accordance with reviewed design.
- 2.6.7 Each solar system shall be capable of full operation at the time of Verification and compliant with minimum safety standards.

Note: For solar systems that require access to online monitoring to determine if the system is capable of full operation access to the online monitoring must be available at the time of Verification.

2.7 Production Meter

- 2.7.1 Each solar system shall have the ability to measure total AC system production in kilowatt-hours with at least +/- 5% accuracy using one of the following methods:
- A production meter built-in to the inverter. It shall appear on the List of Eligible Inverters provided by the [California Energy Commission](http://www.gosolarcalifornia.ca.gov/equipment/inverters.php)⁴ as having an approved built-in meter.
 - A system performance meter (i.e., a microinverter monitor). It shall appear on the List of Eligible System Performance Meters provided by the [California Energy Commission](http://www.gosolarcalifornia.org/equipment/system_perf.php)⁵.

⁴ <http://www.gosolarcalifornia.ca.gov/equipment/inverters.php>

⁵ http://www.gosolarcalifornia.org/equipment/system_perf.php

- c. A hard wired production meter. It shall appear on the List of Eligible System Performance Meters provided by the [California Energy Commission](#)⁵. Refurbished meters may be used with the Program's pre-approval.

- 2.7.2 Multiple-inverter systems may either combine output through a dedicated sub-panel from which the output is metered or use one electric meter for each inverter.
- 2.7.3 When a hard wired production meter is installed, the solar system meter shall have a UV-resistant label identifying it as the Customer Owned Solar Generator Output.
- 2.7.4 All hard wired meters shall be set at 000000 or 999999 at time of shipment to the installer to ensure accurate and consistent "start" readings for every system.

2.8 Battery Energy Storage Systems

- 2.8.1 Batteries shall be located in a secure enclosure that meets seismic requirements and is weatherproof as needed.
- 2.8.2 Access to live battery terminals shall be limited per Oregon Electrical Specialty Code.
- 2.8.3 Battery and inverter cables shall be properly sized, with secured crimps and lugs on ends. Lugs and terminals shall be listed for the wire type used.
- 2.8.4 Charge controller and inverter settings shall be appropriate for the installation's batteries and set for grid-tied optimum performance.
- 2.8.5 Array configuration shall operate within current and voltage limits of charge controller, accounting for temperature-adjusted array voltage under record high and low temperatures for that location.
- 2.8.6 For hybrid systems utilizing wind or micro-hydro turbines in addition to PV, battery overcharge protection using turbine regulation and/or diversion controller and diversion load shall be installed.
- 2.8.7 Ground fault protection shall be added to the System if required by code and not included in the inverter.
- 2.8.8 Customer manual shall include instructions for operation, maintenance and safety procedures for batteries, charge controller and inverter.
- 2.8.9 Systems with lithium-ion batteries must use a listed battery management system.

2.9 Battery Energy Storage Systems Utilizing a Hazardous Electrolyte

- 2.9.1 Batteries shall be listed to UL1793.
- 2.9.2 Flooded batteries shall be housed in an enclosure with adequate spill containment and vented to the outdoors, with a nearby clearly marked OSHA 29 approved safety kit.
- 2.9.3 Temperature compensation probes for inverter and/or charge controller shall be installed to control battery charge properly.

3.0 Customer Manual

3.1 General

- 3.1.1 Upon completion of installation, solar trade ally shall instruct the customer on proper system operation and maintenance and shall provide the customer with a manual (the “Customer Manual”) that includes, at a minimum, the required items listed in Section 3.2 below. The solar trade ally should also provide a permanent label or placard with the website and phone number of the installer at the inverter, AC combiner or system disconnect.
- 3.1.2 A Customer Manual shall be delivered to the customer at the completion of the project. The Customer Manual shall be bound in a durable fashion for new construction projects, commercial projects or if a physical copy is requested by the customer. For other customers, the manual may be provided electronically only if agreed to by the customer. If the customer is provided with an electronic manual, the solar trade ally is also required to upload into PowerClerk and maintain records of the project for the time of the warranties.
- 3.1.3 The Customer Manual along with the system permit(s) (approved electrical and, where applicable, building permit) shall be available during the onsite system verification.

3.2 Required Items

- 3.2.1 System Overview Page that summarizes:
- System’s size and operating conditions
 - Make and model of system components (modules, inverter(s), batteries, energy storage system(s), etc.)
 - System start-up and shut-down procedures
 - Emergency and service contact information
- 3.2.2 Electrical As-built Diagram that accurately depicts:
- All electrical components (e.g., modules, inverters, energy storage systems (ESS), disconnects, and meters), plus main service panel and utility connection
 - Module series/parallel wiring, conductor and ground wire types and sizing, conduit types and sizing, and voltage drop calculations
 - Inputs from existing wind or solar systems, if present
- 3.2.3 Contractor Warranty covering all parts and labor for a minimum of two years
- 3.2.4 Manufacturer Data Sheets for modules, inverter(s), and energy storage systems (ESS)
- 3.2.5 If a hard-wired production meter is not installed, include an informational sheet describing how to read the system’s total kilowatt-hour production from the inverter, system performance meter, or online monitoring system (i.e., microinverter monitor). See Energy Trust [Solar Trade Ally Forms & Resources webpage](https://insider.energytrust.org/programs/solar/forms-and-resources)⁶ for examples.

3.3 Optional Items

- 3.3.1 The following *optional* items are recommended to be included in the Custom Manual and/or provided to the customer in digital format (PDF):

⁶ <https://insider.energytrust.org/programs/solar/forms-and-resources>

- a. Inverter Owner's Manual
- b. Manufacturers' Warranties
- c. Energy Trust Incentive Application
- d. Utility Interconnection/Net Metering Agreement
- e. Parts and Source List with component serial numbers
- f. Manufacturer Data Sheets for other system components
- g.