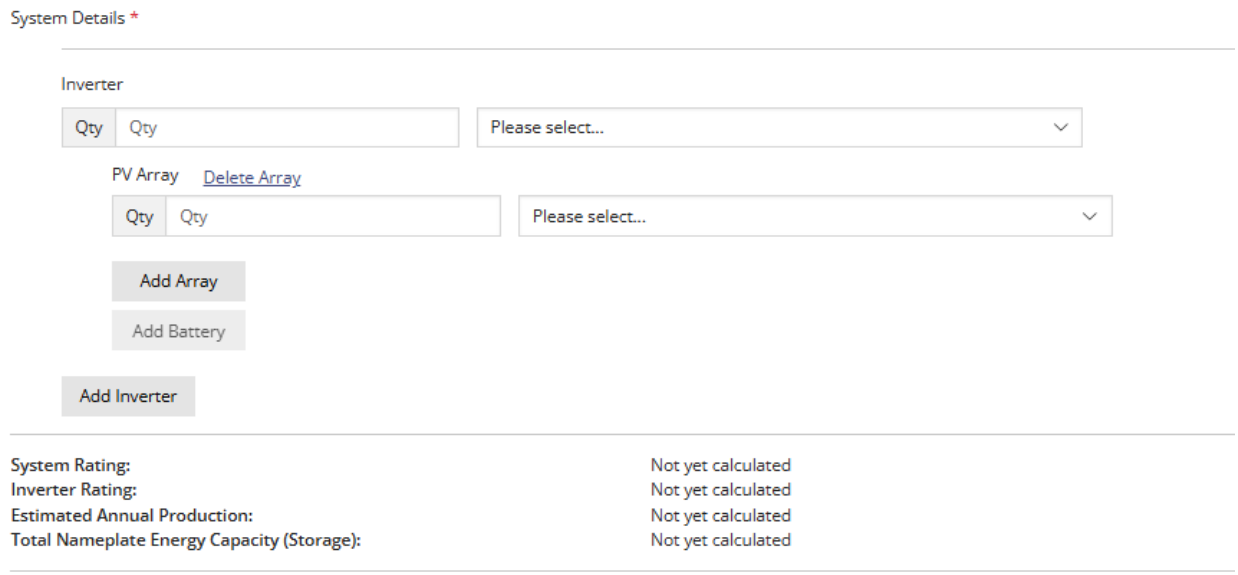
PowerClerk Trade Ally Battery Guidance

Last updated 4/24/26

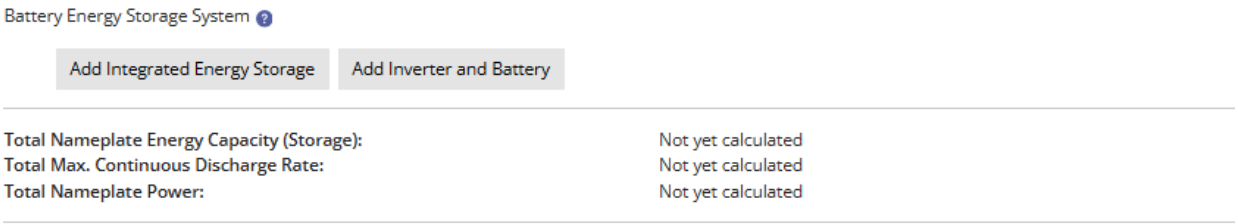
The purpose of this document is to provide guidance to solar trade allies on how best to manage solar + storage or storage-only applications in PowerClerk

Definitions:

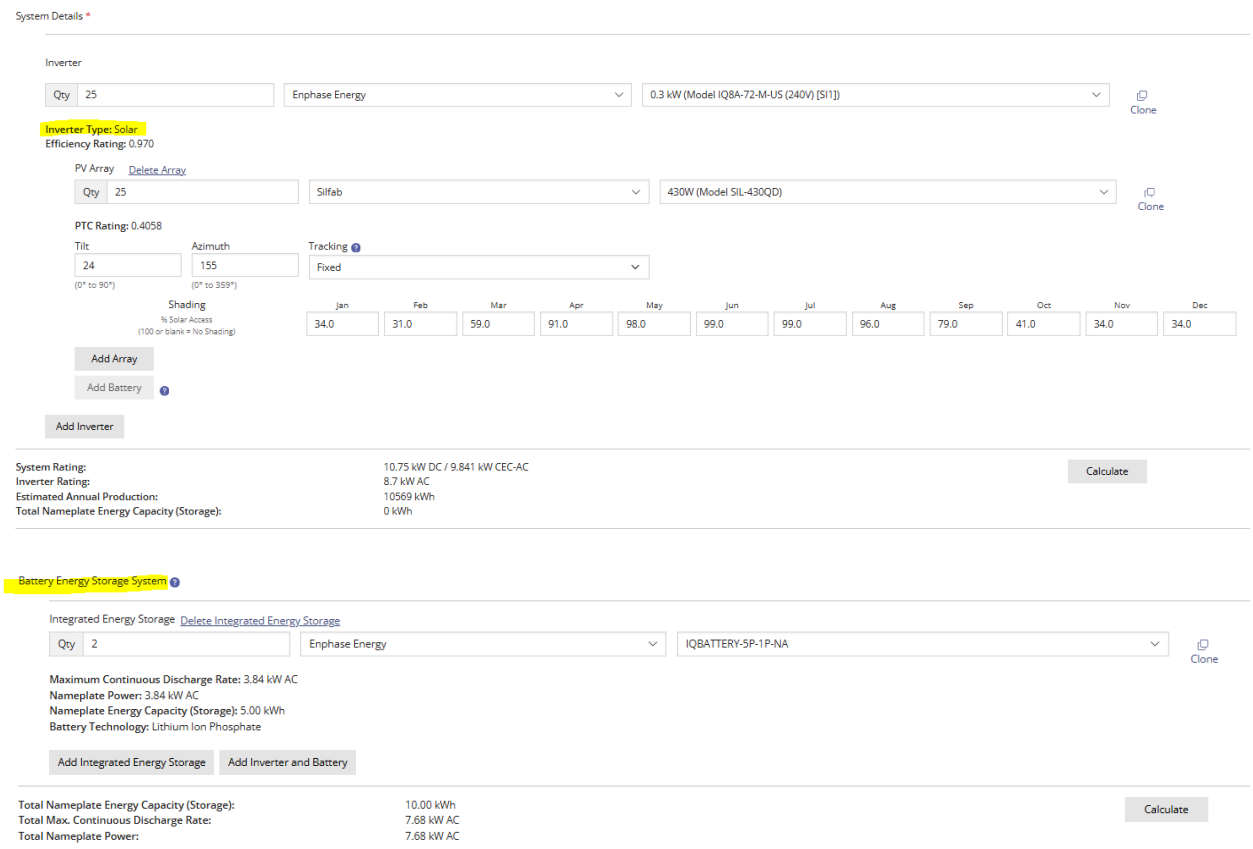
PV System Details: The PV system feature captures both PV and battery information. All projects will include PV information unless it's an add-on battery installation, submitted via a Battery Storage Application.



Battery Energy Storage System: The BESS feature captures distinct inverter and battery storage configurations along with integrated energy storage systems. For storage-only projects, i.e., projects adding additional AC- or DC-coupled battery capacity to an existing qualifying solar project, the information will always be submitted using just the BESS feature.

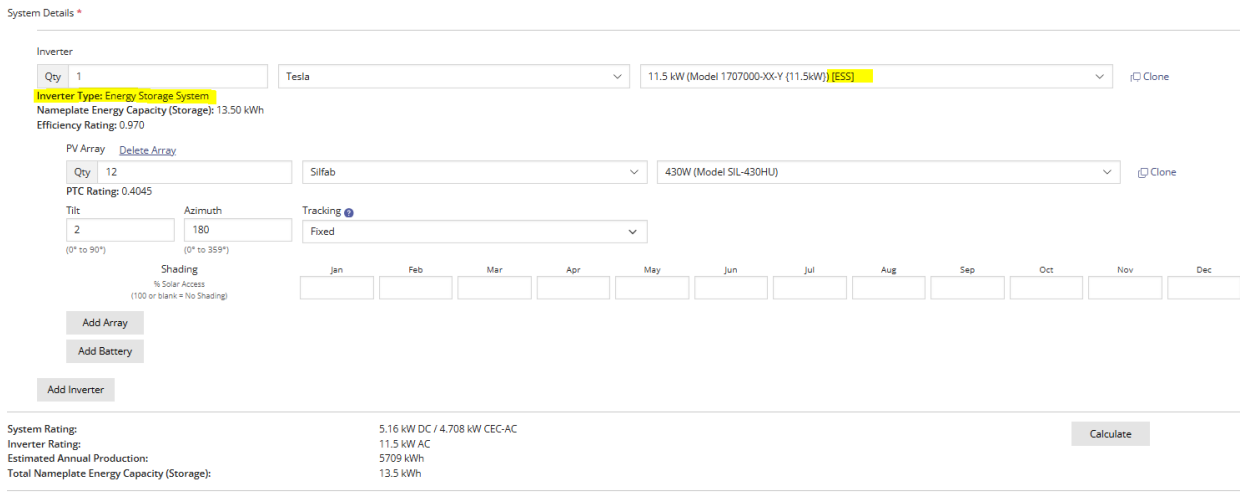


AC-Coupled: The power from the PV array is converted into AC by an inverter and then back to DC for the battery. Most battery retrofits and microinverter projects are AC-coupled and should be submitted in PowerClerk using the PV system and BESS features in PowerClerk.



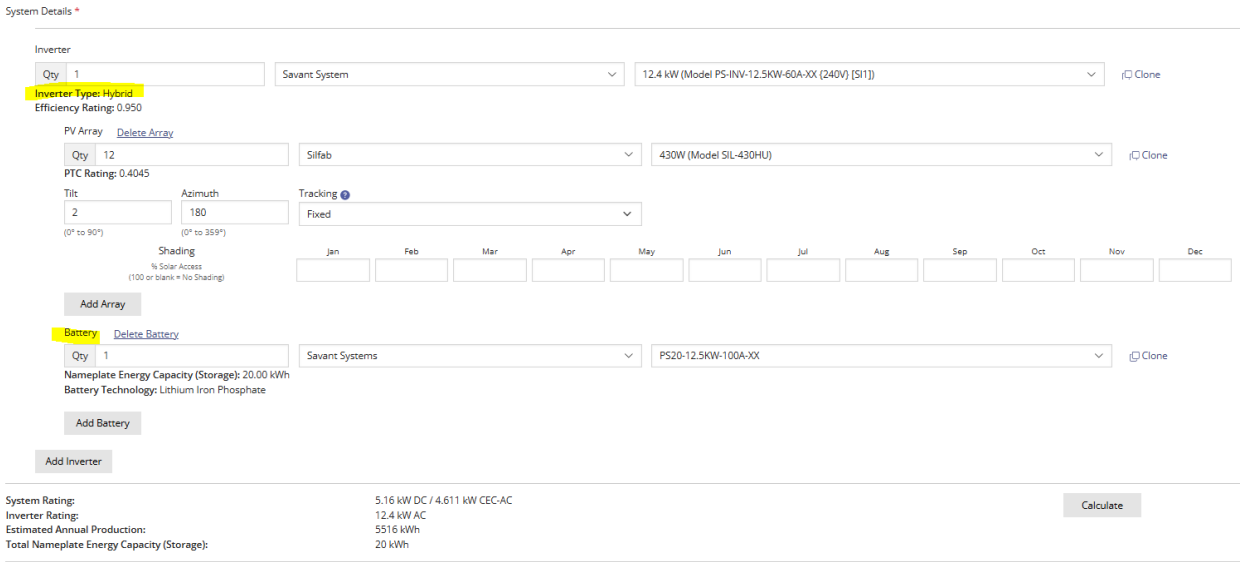
DC-Coupled: DC-coupled systems have batteries charged by the same inverter to which the PV array is connected. DC-coupled systems are submitted in the PV system feature with either an energy storage system that includes an integrated BESS “[ESS]” (Example #1, below), or a non-integrated battery(Example #2, below).

Example #1: DC-coupled with an integrated energy storage system



If there are multiple energy storage systems, the configuration in PowerClerk will be dependent on how the system is designed. Please verify that the Inverter Rating (##. # kW AC) is correct and matches the design.

Example #2: DC-coupled with a hybrid inverter with nonintegrated BESS



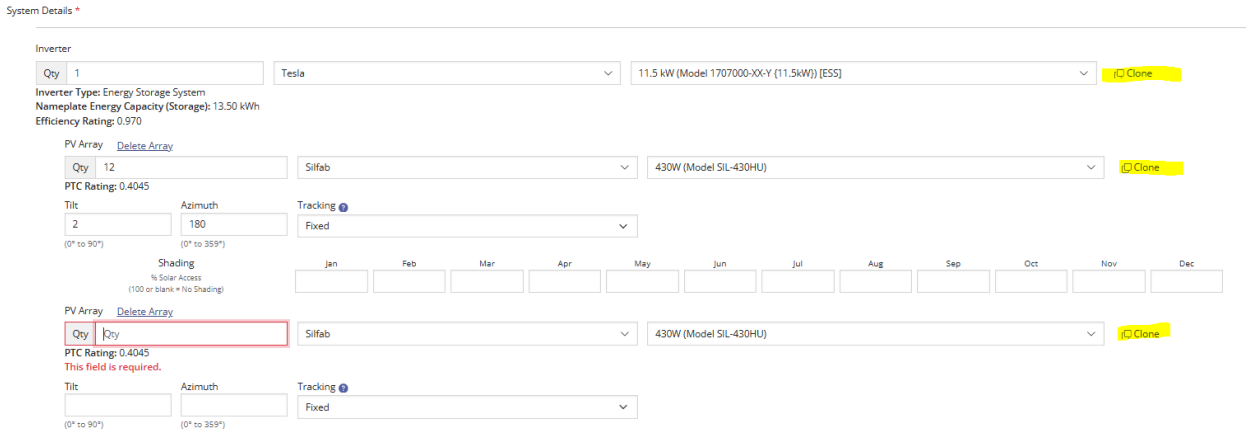
Best Practices:

- Ensure that all new equipment is captured in PowerClerk, including microinverters, if applicable, in a DC coupled system
- If a solar + storage system includes microinverters and an add-on battery that's integrated, the system is AC-coupled and the energy storage system needs to be added in the BESS feature.

- The PV system element will only allow you to add battery storage to a DC-coupled system. Everything else will need to be added through the BESS features in PowerClerk.
- Ensure that the total battery nameplate capacity and the battery nameplate power are clearly labeled on the One-Line and match Total Nameplate Capacity (Storage) and other fields in PowerClerk.

Pro Tips:

- No need to scroll to find equipment in the drop-down feature in the PV System Specification or BESS. Instead, type the beginning of a manufacturer or model, and PowerClerk will populate.
- Utilize the "clone" feature to duplicate PV Arrays.



- The highlighted section at the end of the inverter indicates that it's a "smart inverter" with SI.

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- If there is no shading to record during a month on a PV Array, you can leave the cells for the month blank, and the PV system feature will default to 100% solar access (see example 2, above).

Additional Notes:

- All PV equipment data is sourced from the California Energy Commission's (CEC) approved equipment lists. The CEC updates their equipment list three times a month, on the 1st, 11th, and 21st day of the month (or the following business day). The equipment lists in PowerClerk are updated the following business day.
- BESS equipment options in PowerClerk do NOT mean the battery energy storage system has been approved. Energy Trust maintains a pre-qualified list of battery

energy storage systems. If you have questions about this list, or would like a battery to be added to the list, please email the following to your Energy Trust Account Manager:

  - The battery spec sheet
  - Warranty information
  - Installation manual
  - UL certification from NRTL

  It can take up to one month for the team to review a battery, so please plan accordingly.
- If you have questions on how a solar + storage system should be entered into PowerClerk, email your Account Manager.