



Oregon Solar + Storage Rebate Program PowerClerk User Guide

For the exclusive use of
Approved Contractors



OREGON
DEPARTMENT OF
ENERGY

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ODOE POWERCLERK USER GUIDE

Welcome to the Oregon Solar + Storage Rebate Program

HB 2618 (2019) created the Oregon Solar + Storage Rebate Program at the Oregon Department of Energy. The program issues rebates for solar electric systems and for paired solar and solar storage systems for residential customers and low-income service providers in Oregon.

Approved Contractors are required to know and understand the program requirements and administrative rules to participate. This document does not include the complete administrative rules, so visit the program homepage to access the rules and find other useful information:

<https://www.oregon.gov/energy/Incentives/Pages/Solar-Storage-Rebate-Program.aspx>

PowerClerk

The ODOE PowerClerk system is the program servicing center for approved contractors to submit reservation (project) requests to reserve funds and to submit rebate requests for reserved projects that have been installed and have passed local inspection.

PowerClerk will allow you to amend a reservation if the project has revisions to specifications. Two scenarios to note:

- If the potential rebate amount increases, the increase is only approved if unreserved funds are available.
- If the revision is to add a storage sub-system to an existing solar- only reservation, you will have to withdraw the reservation and create a new reservation for the paired system.

If a project is not moving forward, you can withdraw a reservation in PowerClerk.

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Accessing the Customer Dashboard

The ODOE PowerClerk system is available at:

<https://ossrp.powerclerk.com/>

Users receive an email when a PowerClerk user account is created by the administrator, or when the user's existing PowerClerk account is updated to add access permissions to the ODOE – Solar + Storage Program.

When you first login to ODOE PowerClerk, the Dashboard will appear as below.



New Reservation

Click the New Reservation button to begin a reservation request. The Reservation form is separated into four steps:

- Contractor & Customer Information
- Proposed System Information
- Financials
- Additional Information & Submit

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Contractor & Customer Information

Step 1 begins as follows:

The screenshot displays a four-step process bar at the top: 1. Contractor & Customer Information (active), 2. Proposed System Information, 3. Financials, and 4. Additional Information & Submit. Below the bar, the form includes the following fields:

- External ID (with an information icon)
- Contractor/Company Name *
- CCB Number *

A dark blue header labeled "Customer Information" is followed by the following sections:

- Residential or Service Provider *
 - Residential
 - Low Income Service Provider
- Customer Type * (dropdown menu showing "Not Low-moderate income")
- Interconnection/Contract Type (dropdown menu showing "Grid-Tied")
- Utility *
 - Electric Utility Name * (dropdown menu showing "Select...")
- Incentive (text field showing "No value")

If the project qualifies for incentive funds from Energy Trust of Oregon (ETO), and if the contractor has entered the project into the ETO system, then the ETO project identification number is placed into the **External ID** field. Outside of ETO-served territories, if the electric utility offers an incentive, and has a tracking system for incentive requests, you would specify the request identifier issued by that utility in the **External ID** field.

As ODOE only allows pre-approved contractors to access this system, the only Contractor identification needed on the Reservation is the **Contractor/Company Name** and the **Construction Contractors Board (CCB) license number**.

The only two customer types presently allowed are **Residential** and **Low-Income Service Providers**. (Both of these are specifically defined in the administrative rules.)

If the Project is Residential, then you must specify the "Customer Type" as **Low-Moderate Income** or **Not Low-moderate Income**. (This income level for Low-moderate Income homeowners is defined in the administrative rules)

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If the project is for **Low-Income Service Provider**, please provide the NAICS code. The Service Provider should be able to provide you with the NAICS code they have identified as the best fit to their service activities.

Service Provider Name

NAICS

You can learn more about NAICS codes here:

<https://www.naics.com/search/>

ODOE expects most projects will be **Grid-Tied**, but **Off-Grid** projects will be considered for potential funding under the Program.

Grid Tied projects must specify the **Electric Utility** that services the project site.

More about Electric Utility Incentives

ODOE maintains a list of Electric Utilities that serve Oregon (as sourced from the Public Utility Commission) and ODOE tracks which of those offer incentives for solar and/or storage systems. If you find that our utility incentive database is incorrect, please send an email to ODOE.SolarRebates@oregon.gov and include a contact email for the incentives manager or incentives program at the electric utility.)

If the project does not qualify for a utility incentive or an Energy Trust of Oregon incentive, please indicate so with a note on the final step of the reservation form. After ODOE verifies with ETO or the utility that an incentive will not be provided, ODOE will update the incentive rate from "with Utility Incentive" to "without Utility Incentive," thereby conferring a higher incentive amount. OS+SRP.

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Step 1 continues with fields to gather the Customer Information.

The screenshot shows a form with the following fields and labels:

- Prefix (with a blue help icon)
- First Name (with a red asterisk)
- Middle Initial
- Last Name (with a red asterisk)
- Suffix (with a blue help icon)
- Email Address
- Site Address (with a red asterisk), which includes:
 - Street
 - (empty field)
 - City
 - (dropdown arrow)
 - Zip Code

A "Next" button is located at the bottom right of the form area.

You must provide the **First Name**, **Last Name**, **Email Address**, and **Site Address** of the project customer.

Click the **Next** button to continue to Step 2.

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Proposed System Information

Step2 of the Reservation form gather the technical details of the Solar PV System and, if applicable, the Storage System.

The screenshot shows the 'Proposed System Details' section of the ODOE PowerClerk reservation form. It includes the following fields and options:

- Project Type:** Radio buttons for 'PV Only' (selected) and 'PV + Storage'.
- Solar Electric System Information:** A sub-section header.
- PV System Specification:**
 - Inverter:** Quantity: 1, Manufacturer: SolarEdge Technologies, Model: 5.0 kW (Model SE5000 (240V)).
 - Efficiency Rating:** 0.98.
 - PV Array:** Quantity: 16, Manufacturer: SolarWorld, Model: 330W (Model Sunmodule SWA 330 XL mono black). A 'Delete' button is next to it.
 - Array PTC Rating:** 0.3004.
 - Tilt:** 34 (0° to 90°).
 - Azimuth:** 180 (0° to 359°).
 - Tracking:** Fixed (dropdown menu).
 - Shading:** A grid of 12 input boxes for '% Solar Access (100 or blank = No Shading)' for each month: Jan (90), Feb (90), Mar (95), Apr (99), May (), Jun (), Jul (), Aug (), Sep (), Oct (98), Nov (95), Dec (90).
 - Buttons:** 'Add Array' and 'Add Inverter'.
- System Summary:**
 - System Rating:** 5.28 kW DC / 4.71 kW CEC-AC
 - Estimated Annual Production:** 6917 kWh
 - Calculate:** A button to recalculate the system details.
- TSRF Calculation method:** Radio buttons for 'On-site shade analysis' (selected) and 'Remote shade analysis'.
- TSRF:** A text input field with the value 90.

Specify the **Project Type** as either **PV Only** or **PV + Storage**.

Specify the **Inverter** quantity, manufacturer and model.

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Specify the **PV Array** quantity of panels, manufacturer and model.

Enter the **Tilt Azimuth** and **Tracking** of the array. Tracking is **fixed, single-axis** or **dual-axis**.

Enter the **Shading** value for each month as a percentage of solar access, where 0 or 100 specifies no shading.

Press the **Calculate** button to determine the PV DC rating and Inverter AC rating.

Enter the Total Solar Resource Factor (**TSRF**) calculation method as either **On-site shade analysis** or **Remote shade analysis** and the calculated **TSRF** value.

More About PV Arrays

You can specify an additional **PV Array** that is attached to the **Inverter**, for inverters that support multiple strings.

The **PV System Specification** also supports entry of micro-inverters with multiple inputs from panels.

Generally, a PV Array can include all panels that have a common **Tilt** and **Azimuth**, but you may choose to use additional arrays to account for shading variations, and that may achieve an **Estimated Annual Production** that more accurately reflects the estimate in your design software.

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Step 2 Continues with the specification of the Storage subsystem, if applicable.

The screenshot shows a form titled "Storage Information" with the following fields:

- Storage System Manufacturer *
- Storage Battery Manufacturer *
- Storage Battery Model *
- Technology / Chemistry ⓘ
- Battery Quantity *
- Nameplate Energy Capacity per Battery (kWh) *
- Usable Energy Capacity per battery (kWh)
- Nameplate Power (kW)
- Manufacturer Declared Roundtrip Efficiency ⓘ

All the information requested for Storage System specifications should be available to you on the battery system technical brochure or from the manufacturer.

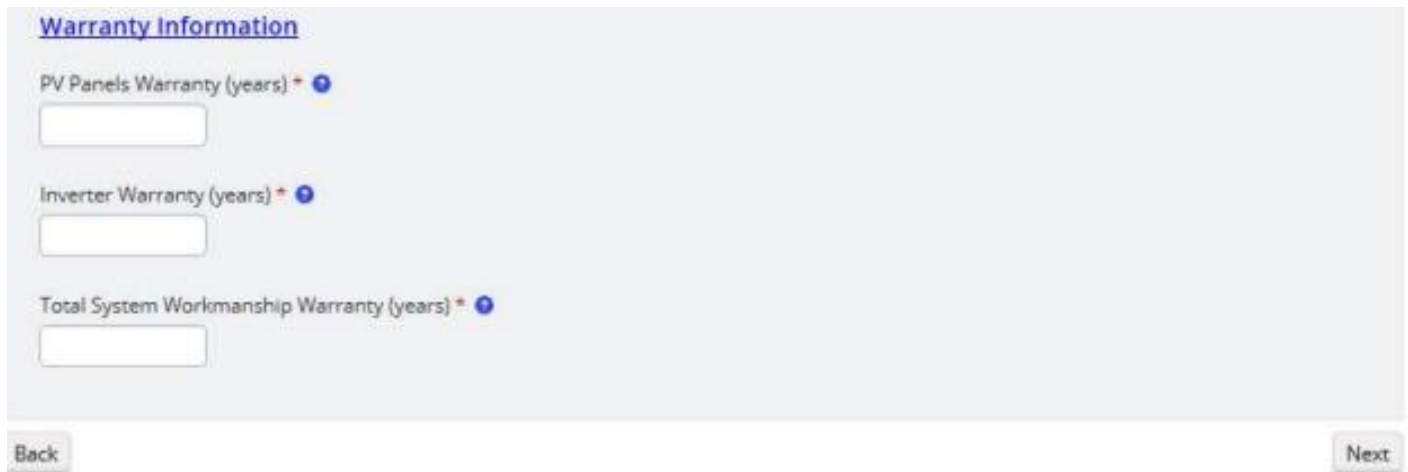
Specify the **Storage System Manufacturer**, the **Storage Battery Manufacturer**, the **Storage Battery Model** and the **Technology/Chemistry** (e.g Li-Ion, Lead Acid, etc.)

Specify the **Battery Quantity** to be installed, the **Nameplate Energy Capacity per Battery** in kWh and the **Usable Energy Capacity per Battery** in kWh. The Storage rebate incentive is calculated on the **Nameplate Capacity**. It is understood that some systems may allow **Usable Capacity** to be limited, at maximum and/or minimum values, to reduce cycle stress on the battery packs and improve longevity.

Specify the **Nameplate Power** in kW and the **Roundtrip Efficiency** as a whole number percentage (typically in the range of 85 to 95 percent, depending upon the chemistry and the inverter).

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Step 2 continues with the Warranty Information



The screenshot shows a web form titled "Warranty Information" with a light blue header. Below the header, there are three input fields, each with a label and a help icon (a blue circle with a question mark). The first field is labeled "PV Panels Warranty (years) *", the second is "Inverter Warranty (years) *", and the third is "Total System Workmanship Warranty (years) *". At the bottom of the form, there are two buttons: "Back" on the left and "Next" on the right.

Specify the duration of the **PV Panels** manufacturer warranty.

Specify the duration of the PV array **Inverter(s)** manufacturer warranty.

Specify the duration of the **Total System Workmanship** contractor warranty.

(A specification of the Storage subsystem warranty is presently not requested.)

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Financials

Step 3 begins with the financials of the proposed project.

The screenshot shows the 'Financials' step (3) of a four-step process. The steps are: 1. Contractor & Customer Information, 2. Proposed System Information, 3. Financials, and 4. Additional Information & Submit. The 'System Cost' section includes four input fields: 'Total PV System Cost' (empty), 'Utility Incentives' (0.00), 'Ineligible Costs' (empty), and 'Storage System Cost' (empty). Below these fields, the 'Net System Cost' is displayed as an error message: 'Error: The System_Cost data field has no value and no default value was defined.' A 'Show Details' link is located at the bottom right of the error message.

Enter the dollar amount of the **Total PV System Cost**, which will be all materials and labor costs attributable to the solar electric system, including ineligible costs, but excluding costs attributable to a Storage sub-system (if any). Do not subtract any PV incentives, rebates, or tax credits from this total cost.

Enter the dollar amount of **Utility Incentives** that this project is going to receive from the Electric Utility or from Energy Trust of Oregon. The form does not display this field if the project site is served by an electric utility that does not offer an incentive directly or through ETO, or if the project is specified as off-grid.

Enter the dollar amount of **Ineligible Costs** for items on the sales contract that are not allowed as part of the eligible system costs. The program rules specify that the ineligible costs “[include], but [are] not limited to, financing charges, maintenance costs, service contracts, extended warranties, reroofing, or costs for auxiliary distribution systems such as electric vehicle charging stations.”

Enter the dollar amount of the **Storage System Cost** (if applicable) which will be all materials and labor costs attributable to the storage sub-system, excluding costs attributable to the solar electric system (in **Total PV System Cost**) and excluding Ineligible Costs, as defined above. Any incentives, rebates or tax credits attributable to the storage system should not be subtracted from this total cost, except for a storage incentive provided by the utility or ETO. The form does not display this field if the project type is **PV Only**.

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The **Net System Cost** will automatically display the net cost upon which the solar PV rebate incentive is calculated. Per the program rules, the net cost cannot include the utility/ETO incentive or the ineligible costs.

Step 3 continues with the calculation of the incentive amounts:

The screenshot shows a web interface titled "Incentive Calculation". It features an "Incentive Selector" dropdown menu currently set to "Not Low Income Utility Incentive Eligible". To the right of the dropdown is a "Calculate Incentive" button. Below the dropdown, the text reads "Calculated Amount for Not Low Income Utility Incentive Eligible: \$1,056.00", with a "Show Calculation Details" link to its right. A second section shows "Storage Incentive" with a value of "\$ 2,500.00" and a "Show Details" link. At the bottom of the interface are "Back" and "Next" navigation buttons.

Select the applicable solar electric system incentive in the **Incentive Selector** list box.

The **Storage Incentive** is, of course, only visible on **PV + Storage** projects.

You have the option to review the formula(s) used to calculate the incentive amount(s).

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Additional Information & Submit

Step 4 of the Reservation form continues as below:

1 Contractor & Customer Information

2 Proposed System Information

3 Financials

4 Additional Information & Submit

Additional Information

Signed Contract *

Browse...

Click "Generate Document" to download and print the customer verification form. Include this form when applying for the rebate post installation.

Project Attestation

Notes

CAUTION:
Please review the information and documentation before submitting the reservation. Incorrect or missing documentation or information may result in the reservation being declined.

Scan the contract document as signed by the customer and contractor and create a PDF file. If the project is for Low- or Moderate-Income Residential, please include the form(s) with the contract. A shading report may also be included and is recommended for sites that have trees or buildings nearby. Click **Browse** to find and attach the PDF to this form.

Click **Generate Document** to generate and receive the Rebate Request and Verification form that has the site address and system description. This document will be signed by customer and contractor **after** the system has been installed and submitted back to ODOE at the Post-Install Rebate Request phase of your project. Please note: If you forgot to download the project attestation document, or you misplace it, you can access the **Project Attestation** form which has a **Generate Document** button that allows you to download the attestation document again.

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The **Notes** field is to provide any additional information that you feel may be necessary to convey to the project reviewers that will evaluate your Reservation request for rebate funds and make the eligibility determination.

Click the **Submit** button to make the reservation request and assign the date and time in the system to your request. The system will display a confirmation message like the following:

Your information was submitted successfully.

Your Project Number is:
ODOE-00002

Continue

The system will return you to the PowerClerk Dashboard and you should now see your Reservation request with the status of **Requested**.

New Reservation

Project #	Current Status	Current Status Timestamp
 ODOE-00002	Requested	01/17/2020

Project # Current Status Current Status Timestamp

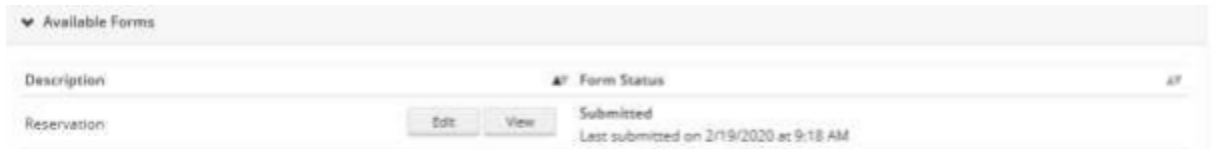
1

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Amendment Request

You may amend your existing and approved reservation requests through ODOE PowerClerk.

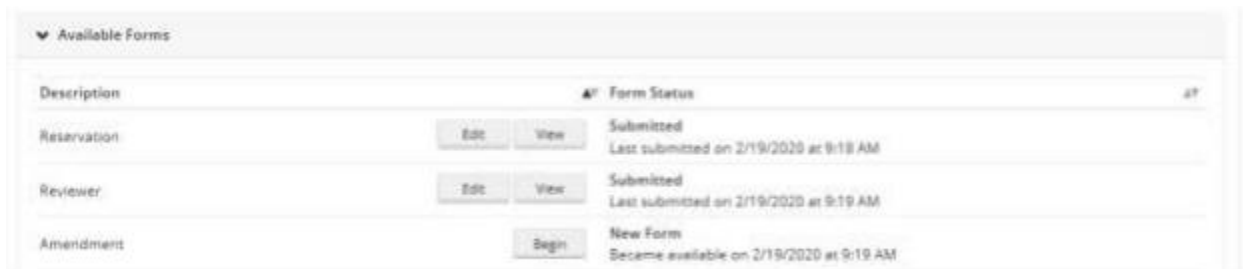
Note that if your Reservation is **not yet** approved, you may edit your reservation and re-submit it at any time by choosing to **Edit** the **Reservation** form.



Description	Form Status
Reservation	Submitted Last submitted on 2/19/2020 at 9:18 AM

Please note that you will not be able to change the customer type, the residential type, the interconnection type, the electric utility or the project type (PV Only or PV + Storage). If any of those details are not accurate, you must Withdraw the reservation and start a new reservation.

If the Reservation has a **Current Status** of **Reserved**, then you may use the **Amendment** form to make a revision. Simply click the **Begin** button to get started.



Description	Form Status
Reservation	Submitted Last submitted on 2/19/2020 at 9:18 AM
Reviewer	Submitted Last submitted on 2/19/2020 at 9:19 AM
Amendment	New Form Became available on 2/19/2020 at 9:19 AM

Amendment Step 2, Amended System & Costs

By default, the form will open on Step 2, Amended System & Costs. You can click to Step 1 to see the existing solar electric design, and storage design as applicable, to make it easier to enter the system details as originally specified, and then make the necessary adjustments.

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Amended Application Project Number: ODOE-00002

1 Initial System & Costs 2 Amended System & Costs 3 Incentive Calculations

Amended Request

PV System Specification

Inverter: Qty: Please select...

PV Array: Delete Array Qty: Please select...

System Rating: Needs to be recalculated

Estimated Annual Production: Needs to be recalculated

Amended TSRF +

After you enter the inverters and module array(s), click the Calculate button to generate the System Rating and the Estimated Annual Production.

Next, update the **TSRF**, **PV System Cost**, **Utility Incentive** (if applicable) and/or **Ineligible Costs**, as necessary to capture the revised system details. For each field with no change, you will reenter the costs that you provided in the initial reservation.

Amended TSRF +

Amended PV System Cost

Amended Utility Incentive

Amended Ineligible Costs

Net System Cost-Amended
41,450.00 [Show Details](#)

If the System Type is PV + Storage, then you will need to re-enter the Storage System details. Remember that you can click Step 1 at the top of the form or click the Back button at the bottom of the form, to view the Storage System details as originally specified. As necessary, you can make changes to a few details of the storage subsystem, or you can change all of the details, including a deletion of the Storage subsystem by entering 0 in the required fields.

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Amended Request: Storage

Number of Batteries *

Battery Manufacturer

Battery Model *

Technology / Chemistry ?

Amended Nameplate Energy Capacity (kWh) *

Amended Usable Energy Capacity (kWh)

Amended Nameplate Power (kW)

Amended Manufacturer Declared Roundtrip Efficiency ?

Amended Storage Cost *
\$

Back Next

After completing the Storage details, click Next to proceed to Step 3, Incentive Calculations.

Amendment Step 3, Incentive Calculations

On Step 3, the Amended Application form displays the Reserved Solar Incentive and, if applicable, the Reserved Storage Incentive.

For the Amended Solar Incentive, select the “_Amended” incentive and then click Calculate Incentive.

Amended Incentive
Not Low Income & Utility Incentive;_Amended

Incentive Amount for Not Low Income & Utility Incentive;_Amended: \$3,600.00

Calculate Incentive
Show Calculation Details

Then, please specify the **Reason for Amendment**. Then, click **Generate Document** to download a new project attestation form to be signed by your customer and you after the installation has occurred.

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Reason for Amendment

Customer request to modify the size and brand of the storage subsystem

Click "Generate Document" to download and print the customer verification form for the amended system. Include this form when applying for the rebate post installation.

Project Attestation Amendment

Finally, click the **Submit** button to commit your changes to the reservation. A program assistant will then review the amendment and process the request. If the incentive amount will be higher than first requested, the approval of a higher amount is contingent on the availability of unreserved funds for the applicable incentive rate.

Post-Install Rebate Request

After you have completed the installation of a system described in an approved reservation, you may submit a Post- Install Rebate Request. Click **Begin** to get started.

Post-Install Rebate Request

A lot of fields will auto populate to what was already submitted in the reservation request or an amendment request, see the following below (grey fields):

Project Number: ODOE-00002

Business or Residential
Residential

Customer Type
Not Low-moderate income

Interconnection/Contract Type
Grid-Tied

Date System brought online (if applicable)

System Location Latitude

System Location Longitude

Site Physical Address
550 Capitol Street

Salem OR 97301

County
Marion

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Continue Post-Install Rebate Requests form below:

Final PV System Cost * ⓘ
\$

Attach Final Electrical Inspection(s) * ⓘ Browse

Attach Invoice * Browse

Signed Project Attestation * ⓘ Browse

Completed W9 form Browse

Comments/Notes

Enter the dollar amount of the **Total PV System Cost**

Attach the **Final Electrical Inspection(s)**, Click **Browse** to find and attach the PDF to this form.

Attach the **Final Invoice** of the project, showing the **Total System Cost** and on separate line items of how much was the **ODOE Rebate** and **utility company rebate** or **ETO incentive** was given, Click **Browse** to find and attach the PDF to this form.

Attach the **Signed Project Attestation**, this document will be signed by customer and contractor **after** the system has been installed and submitted back to ODOE.

Please note: If you forgot to download the project attestation document, or you misplace it, you can access the **Project Attestation** and click **Begin** which has a **Generate Document** button that allows you to download the attestation document again.

Project Attestation

Forgot to download the customer attestation form or lost the original? Download it again below. Don't forget to have the customer sign.

Project Attestation

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Attach **Completed W-9 Form** if Oregon Department of Energy does not have your Company' information for processing rebate request or if there is new updated information that we need to process request. Click Browse to find and attach the PDF to the form.

The **Notes** field is to provide any additional information that you feel may be necessary to convey to the project reviewers that will evaluate your Rebate request for rebate funds for approval.

Continues Post-Install Rebate Requests form below:

Project Type
 PV Only
 PV + Storage

[Original System](#)

PV System Specification

Inverter
Qty 1 SolarEdge Technologies 7.6 kW (Model SE7600H-US (240V))
Efficiency Rating: 0.990

PV Array Delete Array
Qty 12 Panasonic Group SANYO Electric 320W (Model VBHN320KA03)
PTC Rating: 0.2976

Tilt 20 Azimuth 192 Tracking Fixed
(0° to 90°) (0° to 359°)

Shading
% Solar Access
(100 or blank = No Shading)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
76.0	75.0	83.0	92.0	95.0	95.0	96.0	96.0	84.0	76.0	78.0	77.0	

PV Array Delete Array
Qty 15 Panasonic Group SANYO Electric 320W (Model VBHN320KA03)
PTC Rating: 0.2976

Tilt 34 Azimuth 192 Tracking Fixed
(0° to 90°) (0° to 359°)

Shading
% Solar Access
(100 or blank = No Shading)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
69.0	73.0	82.0	91.0	92.0	92.0	93.0	94.0	88.0	73.0	71.0	70.0	

Add Array

Add Inverter

Zip Code has not been configured for form; calculation not enabled.
System Rating: 18 kW DC / 16,368 kW CEC-AC
Estimated Annual Production: 28882 kWh

Calculate

Incentive Selector
Not Low Income Utility Incentive Eligible
Incentive Amount for Not Low Income Utility Incentive Eligible: \$3,600.00

Calculate Incentive
Show Details

Amendment Submitted?

Submit

A lot of fields will auto populate to what was already submitted in the reservation request or an amendment request, see the following above (grey fields):

Click the **Submit** button to make the rebate request.

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FOR MORE INFORMATION

The Oregon Department of Energy
550 NE Capitol Street NE
Salem, OR 97301

503-378-4040 | 800-221-8035

ODOE.SolarRebates@oregon.gov

www.oregon.gov/energy

