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## PERMANENT ADMINISTRATIVE ORDER

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CHAPTER 330

### DEPARTMENT OF ENERGY

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FILING CAPTION: Amendments to Oregon Solar Plus Storage Rebate Program

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RULES:

330-240-0010, 330-240-0020, 330-240-0030, 330-240-0050, 330-240-0120, 330-240-0130, 330-240-0140, 330-240-0150, 330-240-0170

AMEND: 330-240-0010

RULE TITLE: Definitions for Division 240

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rule provides the definitions used in Division 240. Following updates to the program definitions in the Oregon Laws, a new definition of "pair" has been added, the definition of "paired solar and storage system" has been updated, and several other definitions have been updated to account for energy storage systems being eligible for a rebate.

RULE TEXT:

(1) "Completion date" means the date as of which a solar electric system, energy storage system, or paired solar and storage system has passed its final inspection by the authority having jurisdiction.

(2) "Contractor" has the definition given in Oregon Laws 2019 Chapter 655 Section 1(1) and means a person whose trade or business consists of offering for sale solar electric systems or paired solar and storage systems or of providing

construction, installation, or design services for solar electric systems or paired solar and storage systems.

(3) "DC" means direct current electricity.

(4) "Department" means the Oregon Department of Energy.

(5) "Director" means the director of the Oregon Department of Energy.

(6) "Eligible project cost" means the costs allowed for determining the rebate, including solar photovoltaic modules, mounting structure and hardware, associated electrical equipment, energy storage system equipment, and labor costs.

(7) "Energy storage system" has the definition given in Oregon Laws 2019 Chapter 655 Section 1(3) and means commercially available technology that is capable of retaining energy, storing the energy for a period of time, and transmitting the energy after storage.

(8) "Household" means all individuals who reside in the place of residence, including all family members and roommates who are not related and not part of a separate lease agreement.

(9) "Ineligible project cost" means the costs not allowed for determining the rebate, including, but not limited to, financing charges, maintenance costs, service contracts, extended warranties, reroofing, or costs for auxiliary distribution systems such as electric vehicle charging stations.

(10) "Low- or moderate-income residential customer" means a residential electrical utility customer whose household income is less than or equal to 100 percent of state median income adjusted for household size.

(11) "Net cost" has the definition given in Oregon Laws 2019 Chapter 655 Section 1(5) and means the actual cost of the purchase, construction, and installation of a solar electric system or a paired solar and storage system, minus any incentive received for the system from the electric utility serving the customer for which the system is installed.

(12) "Pair" has the definition given in Oregon Laws 2019 Chapter 655 Section 1(6) and means pairing an energy storage system with a solar electric system such that the energy storage system provides storage capacity for electrical energy produced by the solar electric system.

(13) "Paired solar and storage system" has the definition given in Oregon Laws 2019 Chapter 655 Section 1(7) and means a solar electric system and an energy storage system purchased together, constructed, and installed by the same contractor and paired such that the energy storage system provides storage capacity for electrical energy produced by the solar electrical system.

(14) "Program" means the solar plus storage rebate program established by Oregon Laws 2019, chapter 655 (House Bill 2618).

(15) "Purchase date" means the date that a contract for purchase of a solar energy system, energy storage system, or paired solar and storage system is signed by both the contractor and the customer for which the system is installed.

(16) "Residential customer" means the owner-occupant of a residential dwelling. An occupant who is the trustee of a trust that is the owner of a residential dwelling, is considered to meet the definition of residential customer.

(17) "Solar electric system" has the definition given in Oregon Laws 2019 Chapter 655 Section 1(8) and means any system, mechanism or series of mechanisms, including photovoltaic systems, that uses solar radiation to generate electrical energy.

(18) "Utility incentive" means financial assistance that lowers the capital cost of a solar electric system, energy storage system, or paired solar and storage system and that is provided directly from an electric utility as defined in ORS 757.600 or from funds provided by the Energy Trust of Oregon pursuant to ORS 757.612.

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)

AMEND: 330-240-0020

RULE TITLE: Contractor Eligibility

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rule outlines the contractor eligibility. Amendments to the rule add in language updating the existing requirements for a contractor to hold and maintain applicable licenses to account for energy storage systems being eligible for a rebate.

RULE TEXT:

- (1) In order to participate in the program, a contractor must meet the eligibility requirements provided in these rules. Once the Department has confirmed a contractor's eligibility, the contractor will receive login credentials to use the software system designated by the Department to receive and track reservation applications.
- (2) The Department may begin accepting contractor registrations January 1, 2020. The Department may continue to accept new contractor registrations throughout the duration of the program until all funds allocated to the program have been spent or the sunset of the program, whichever comes first.
- (3) A contractor must meet the eligibility requirements listed below and submit appropriate documentation to the Department. The Department will verify the completeness and accuracy of information submitted by a contractor as part of the contractor registration process.
  - (a) A contractor that constructs or installs a solar electric system, energy storage system, or paired solar and storage system, or a subcontractor that constructs or installs a solar electric system, energy storage system, or paired solar and storage system on behalf of a contractor that offers such systems for sale, must hold any license, bond, insurance or permit required to construct or install a solar electric system, energy storage system, or a paired solar and storage system. The contractor or any subcontractors performing construction or installation must maintain all applicable licenses, bonds, insurance or permits throughout the construction and installation period until the solar electric system, energy storage system, or paired solar and storage system is complete.
  - (b) If the contractor is an Energy Trust of Oregon solar trade ally who is currently eligible to apply for Energy Trust of Oregon incentives on behalf of customers, the contractor is eligible to register for the program and make reservations under the program. Contractors are required to notify the Department within five business days of becoming ineligible to apply for Energy Trust of Oregon incentives.
  - (c) If the contractor is not an Energy Trust of Oregon solar trade ally, the contractor must meet at least one of the following requirements:
    - (A) The contractor either holds, or employs an individual holding, the PV Installation Professional (PVIP) certification administered by the North American Board of Certified Energy Practitioners (NABCEP), or the contractor employs both a PV Installer Specialist (PVIS) certified by NABCEP and a person with the NABCEP PV Technical Sales (PVTS) certification.
    - (B) The contractor is identified as an approved solar PV installer on a list maintained by an electric utility as defined in ORS 757.600 serving customers in Oregon.
- (4) The Department reserves the right to verify all applicable licenses, bonds, insurance, permits or certifications of a contractor at any time, including a contractor's status as a solar trade ally with Energy Trust of Oregon.

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)

AMEND: 330-240-0030

RULE TITLE: Project Eligibility

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rule outlines the program requirements for a project to be eligible. Amendments include the addition of requirements for energy storage systems that will be paired at the time of installation with a previously purchased and installed solar electric system.

RULE TEXT:

To be eligible for a rebate for the sale, construction, or installation of a solar electric system, energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, or a paired solar and storage system, the system must meet the following requirements:

- (1) The solar electric system, energy storage system, or paired solar and storage system must be installed by an eligible contractor. The contractor may use subcontractors in the construction or installation of a solar electric system, energy storage system, or paired solar and storage system; however, all firms and individuals working on the construction or installation of a solar electric system, energy storage system, or paired solar and storage system, whether working on behalf of the contractor or a subcontractor, must hold any license, bond, insurance or permit required for the work performed.
- (2) In the case of a paired solar and storage system, the solar electric system and energy storage system must be purchased together from the same eligible contractor.
- (3) In the case of a paired solar and storage system, the solar electric system and associated energy storage must be constructed and installed by the same eligible contractor or a subcontractor working for the eligible contractor, as provided in subparagraph (1), such that the energy storage system provides storage capacity for electrical energy produced by the solar electric system.
- (4) In the case of a paired solar and storage system, the system must include a minimum of one kilowatt DC of solar electric nameplate capacity for every five kilowatt-hours of battery storage.
- (5) In the case of an energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, the paired system must include a minimum of one kilowatt DC of solar electric nameplate capacity for every five kilowatt-hours of battery storage.
- (6) The purchase contract for a solar electric system, energy storage system, or paired solar and storage system must be signed on or after January 1, 2020.
- (7) A contractor must submit a reservation application before starting construction or installation of a solar electric system, energy storage system, or paired solar and storage system in order to be eligible for a rebate.
- (8) The solar electric system, energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, or paired solar and storage system must be installed on real property in Oregon.
- (9) The solar electric system, energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, or paired solar and storage system must benefit a residential customer or a low-income service provider as defined in these rules.
- (10) The solar electric system, energy storage system, or paired solar and storage system must consist of new equipment.
- (11) In the case of a solar electric system, the system must contain all components necessary to convert and deliver solar energy into electrical energy for use in a dwelling or commercial application.
- (12) Equipment purchased for a solar electric system or a paired solar and storage system must include a manufacturer warranty covering the following:
  - (a) The photovoltaic inverters for a minimum of five years against manufacturer's defects.
  - (b) Photovoltaic modules for a minimum of 20 years against degradation of performance below 80 percent of original output under standard test conditions.

- (13) All installations of a solar electric system or paired solar and storage system must include a total system workmanship warranty that covers the installation of solar panels, inverters, racking, patented roof protection systems, roof penetrations, batteries, electrical and mechanical parts, and wiring for the duration of at least five years.
- (14) All installations of an energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system must include a workmanship warranty that covers the installation of the battery for the duration of at least five years.
- (15) Any equipment installed as part of a solar electric system, energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, or paired solar and storage system must meet industry standards and the technical specifications provided in these rules.
- (16) The solar electric system, energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, or paired solar and storage system must have received all applicable electrical and structural permits from the local jurisdiction and must pass all final inspections conducted by the authority having jurisdiction.
- (17) The solar electric system, energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, or paired solar and storage system must follow electric utility-specific rules and regulations.
- (18) The Total Solar Resource Fraction ("TSRF") shall be calculated for each photovoltaic array and provided to the Department for reporting in the Department's designated software system. The Department reserves the right to request documentation from a solar site analysis tool and to conduct independent verification of TSRF values. If all modules in a photovoltaic array do not meet the minimum TSRF requirement under this section, an eligible contractor may apply for a reservation based on the eligible modules. Only photovoltaic modules that meet the minimum performance standards of this section represent installed capacity for the purpose of solar electric system rebate calculations. All installations must meet the following minimum performance standards:
- (a) For on-site shade analysis the TSRF must be 75 percent or greater at all points on the photovoltaic array.
- (b) For remote shade analysis the TSRF must be 80 percent or greater for the roof plane where the photovoltaic array is located.
- (19) In the case of an energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, the previously installed solar electric system must meet the minimum performance standards in 330-240-0030(18)(a) or (b).
- (20) Under no circumstances will more than one rebate be issued under the program for the same solar electric system, energy storage system, or paired solar and storage system.
- (21) A solar electric system, energy storage system, or paired solar and storage system installed for a low-income service provider who is eligible under 330-240-0070 paragraph (4) must be installed on a public building that provides social services to low- or moderate-income individuals, or provides emergency shelter and/or communications in disaster situations.
- (22) A solar electric system or paired solar and storage system may share an AC disconnect and main utility panel.
- (23) A solar electric system or paired solar and storage system qualifying for residential rebates may not be part of a larger system or share components such as racking with other solar electric or paired solar and storage systems.

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)

AMEND: 330-240-0050

RULE TITLE: Energy Storage System Technical Specifications

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rule details the technical specification requirements for energy storage systems. The amendment adds that the Department will consider the eligibility of energy storage systems that will be paired at the time of installation with a previously purchased and installed solar electric system that does not interconnect with the local utility's distribution grid on a case-by-case basis.

RULE TEXT:

- (1) All batteries must be certified to UL 1973.
- (2) All battery storage systems must be certified to UL 9540.
- (3) The Department will consider the eligibility of energy storage equipment for energy storage systems that will be paired at the time of installation with a previously purchased and installed solar electric system that does not interconnect with the local utility's distribution grid and paired solar and storage systems that do not interconnect with the local utility's distribution grid on a case-by case basis.

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)

AMEND: 330-240-0120

RULE TITLE: Reservation Process

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rule details the rebate reservation application requirements. Amendments update the application requirements to account for energy storage systems that will be paired at the time of installation with previously purchased and installed solar electric systems.

RULE TEXT:

(1) Contractors must submit an application to reserve a rebate for a solar electric system, energy storage system that will be paired at the time of installation with a previously purchased and installed solar electric system, or a paired solar and storage system using the Department's designated software system.

(2) The following information about an installation must be provided to the Department to make a reservation application:

(a) Name of customer.

(b) Whether the installation benefits a residential customer or a low-income service provider.

(c) Address of installation and unit number, if applicable.

(d) Size of the solar electric system.

(e) System specifications of the solar electric system, as listed in the Department's software system.

(f) Total Solar Resource Fraction, or TSRF, for the photovoltaic array.

(g) Size of the energy storage system, if applicable.

(h) System specifications for the energy storage system if applicable, as listed in the Department's software system.

(i) For a residential customer, whether the customer claims to be qualified as low-income or moderate-income.

(j) Eligible project cost for solar electric system, if applicable.

(k) Eligible project cost for energy storage system, if applicable.

(l) Whether the project will receive a utility incentive.

(m) Amount of utility incentive, if applicable.

(n) Date of contract signed between customer and contractor.

(o) Copy of the signed contract.

(p) Other information as requested by the Department.

(3) Reservation applications for low-income service providers must provide the following information in addition to the information in paragraph (2):

(a) For multifamily affordable housing: the state and/or agencies which have awarded public subsidies to the project, the number of units in the project, and the projected occupancy date.

(b) For low-income service providers other than multifamily affordable housing: documentation required to verify the organization's eligibility consistent with program rules.

(4) The Department's software system will confirm receipt and will give each reservation application a time and date stamp signifying the time and date the initial reservation application is received. The Department will review reservation applications in the order that they are received, based upon the time and date stamp. The Department will provide written notice to the contractor once a reservation application has been approved or denied. Subject to the availability of funds, program funds will be reserved for a project following departmental approval of a reservation request.

(5) A reservation for a residential customer installation is valid for 180 days unless extended under OAR 330-240-0130. If a rebate is not claimed within 180 days and the reservation is not extended, the reservation will no longer be valid.

(6) A reservation for a low-income service provider installation is valid for one year unless extended under OAR 330-240-0130. If a rebate is not claimed within one year and the reservation is not extended, the reservation will no longer be valid.

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)

AMEND: 330-240-0130

RULE TITLE: Amending or Extending a Reservation

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rule outlines the rebate reservation amendment process. Amendments add in that energy storage system reservations can be amended.

RULE TEXT:

(1) A contractor may make changes to system size or specifications for a solar electric system installation, energy storage system, or a paired solar and energy storage system installation after submitting a reservation application and before claiming a rebate.

(2) If a contractor increases the size of an installation for which a reservation application was previously submitted, such that the customer is eligible for a larger rebate amount than the initial reservation application, the increase in rebate amount is subject to availability of funds as of the date the amended application is approved by the Department.

(3) If a contractor adds energy storage to a solar electric system already having a reservation for a rebate under the program, such that the installation becomes a paired solar and storage system, the contractor must submit a new reservation application which will receive a new time and date stamp in the Department's software system. The rebate amount for a paired solar and storage system under this paragraph is subject to availability of funds as of the date the new reservation application for the paired solar and storage application is approved by the Department.

(4) At the end of the 180-day reservation period, the Department may grant one 180-day extension to each reservation upon request for any reason. At the end of the 360-day extended reservation period, one final additional 180-day extension may be granted to each reservation upon request for any reason.

(5) The Department may grant additional 180-day extensions for a reservation for a low-income service provider upon the contractor submitting documentation that the project is making progress toward completion. Such documentation could include evidence that the project is meeting construction benchmarks or maintains valid site construction permits.

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)

AMEND: 330-240-0140

RULE TITLE: Making a Rebate Request

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rule details the process for requesting a rebate. The amendments add in requirements for the new energy storage system rebate.

RULE TEXT:

The eligible contractor seeking a rebate must supply the following information to the Department to convert a reservation into a rebate request:

- (1) Name of customer
- (2) Address of installation and unit number, if applicable
- (3) Description of the equipment included in the solar electric system, energy storage system, or paired solar and storage system
- (4) System installation completion date
- (5) Proof of completion, including permits received from the authority having jurisdiction over permitting for the system
- (6) Documentation that the contractor, and any subcontractors who performed installation or construction of the system, has any license, bond, insurance or permit, as well as any additional certification required by the Department, required for the construction or installation undertaken by that contractor or subcontractor
- (7) A statement signed by both the contractor and the customer for whom the solar electric system, energy storage system, or paired solar and storage system is installed that the customer has received the full value of the rebate as a reduction in the net cost of the purchase, construction or installation of the system and that the rebate was clearly reflected on an invoice provided to the customer
- (8) Contractor's business mailing address
- (9) Contractor's tax identification number
- (10) Other information requested by Department

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)

AMEND: 330-240-0150

RULE TITLE: Allocation of Rebate Funds

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rules detail how program funds may be allocated and how applications will be processed. The amendments add in that no more than 25 percent of funds available for rebates in a calendar year may be used for rebates for energy storage systems paired with previously purchased and installed solar electric systems. The language detailing how rebate funds will be made available is simplified.

RULE TEXT:

(1) Subject to limits on the number of reservations per contractor and on the percentage of funding that may be spent under the program for specific categories of installations, the Department will allocate rebate funding within each funding allocation in paragraph (7) according to the order in which reservation applications are approved by the Department. The Department will review applications for reservation in the order in which reservations are submitted by contractors, signified by the time and date stamp for receipt of the reservation application.

(2) The Department will only reserve funding for a maximum of forty (40) reservations per contractor at a time, consisting of up to twenty reservations in each of two categories:

(a) systems for residential customers who are not low- or moderate-income; and

(b) systems for low- or moderate-income residential customers or low-income service providers.

(3) A new reservation application will be rejected by the Department if the contractor already has twenty current reservations in the Department's software system for the category of system for which the contractor is attempting to make a new reservation application. Once a contractor converts a reservation into a rebate request using the Department's software system, the contractor may obtain an additional reservation for that category.

(4) No more than 75 percent of program funds may be used for rebates benefitting residential customers who are not low- or moderate-income residential customers, except as provided in paragraph (9).

(5) No more than 50 percent of funds may be used for rebates benefitting low-income service providers.

(6) No more than 25 percent of funds may be used in a calendar year for rebates for energy storage systems paired with previously purchased and installed solar electric systems.

(7) The Department will make rebate funds available for reservation according to the following:

(a) 50 percent of rebate funds will be available for reservation for systems for low- or moderate-income residential customers or low-income service providers.

(b) 50 percent of rebate funds will be available for reservation for systems for residential customers other than low- or moderate-income residential customers.

(8) The Department may reallocate a portion of funds under subparagraph (7)(a) and make the funds available for reservations for residential projects for residential customers who are not low- or moderate-income, subject to the requirement that at least 25 percent of program funds available for issuing rebates in a calendar year be made available to low- or moderate-income residential customers or low-income service providers.

(9) If total funds spent and allocated for installations for low- or moderate-income residential customers and low-income service providers in a calendar year are less than 25 percent of the program funds available for that year, then the unspent and unallocated funds may be made available for all applicants, including residential customers who are not low- or moderate-income residential customers, in the following year.

(10) The Department will periodically post information on its webpage regarding fund balances, including notification when funds that may be used for specific categories of installations are completely spent in the form of rebates or allocated in the form of reservations.

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)

AMEND: 330-240-0170

RULE TITLE: Revocation of Contractor Eligibility

NOTICE FILED DATE: 02/19/2026

RULE SUMMARY: The rules detail why the Director of the Oregon Department of Energy may deny or revoke a contractor's eligibility to claim a rebate. The amendments add in the new rebate type for energy storage systems into the descriptions so that the program expectations apply to all rebate application types.

RULE TEXT:

The Director may deny or revoke a contractor's eligibility to claim a rebate on behalf of a customer, pursuant to the procedures for a contested case under ORS chapter 183, if the director finds any of the following:

- (1) The contractor's eligibility under OAR 330-240-0020 was obtained by fraud or misrepresentation by the contractor.
- (2) The contractor's performance for installation of solar electric systems, energy storage system, or paired solar and storage systems does not meet industry standards
- (3) The contractor has misrepresented to customers either the program or the nature or quality of the solar electric systems, energy storage systems, or paired solar and storage systems for which rebates are available.
- (4) The contractor attempts to obtain a rebate through fraud or misrepresentation.

STATUTORY/OTHER AUTHORITY: ORS 469.040, Oregon Laws 2019 chapter 655 (House Bill 2618)

STATUTES/OTHER IMPLEMENTED: Oregon Laws 2019 chapter 655 (House Bill 2618)