

Site Visit Data Collection Form

The site visit is an opportunity to further develop an understanding of the client's goals. Depending on what was discovered during previous steps, some of that information may be beneficial to share with the client. Either way, this is the opportunity to gather much of the information needed by the project designer.

It may be helpful to approach the site visit systematically by starting at the beginning. Take a photo of the transformer and follow the service (overhead or underground) to the service entrance and meter(s). Sketch the run on your overhead image. Take photos of the service entrance and meter(s). Take a close-up photo for nameplate information and another photo a few steps back for context. Take photos of any switchgears, load centers, and disconnects. When doing so, make sure to capture nameplates and make a sketch of the wall(s) to which the equipment is mounted. Remove faces of any load centers that are 200 amps or smaller and take a photo.

Start identifying possible locations for the inverters. Consider the structure of possible wall(s) and where the inverters could be mounted.

Keeping with the systematic approach, look at the route you would take from the main electric interconnection to the potential array sites.

If this is a ground mount, take note of any obstructions (above and below ground) and topography on the overhead image.

If this is a roof mount, take note of the roofing material, layers of decking, and insulation materials. A sandwich sketch is always helpful here. Then, note the roof support structure. Take photos and sketch dimensions of the supports and distance between supports, rafters, purlins, etc. Knowledge of the builder, drawings, age of the building, etc. will also be helpful here to establish dead and live load limits.

Is this a steel roof? Measure and sketch the profile. Is this a flat roof? Document the materials making up the roof covering. Take note of the roof's condition.

How are you measuring shading? Are you measuring roof obstructions and transferring to SAM, Helioscope, or PVSyst software?


Take your time. Put yourself in the shoes of the system designer.

Business Name	
Point of Contact (POC)	
POC Phone	
POC Email	
Site Address	

Have the following on hand:


- Printed aerial view of property, buildings, etc.
- Summary of Client Energy Profile
- Summary of Utility Profile
- Summary of Site Profile
- Summary of AHJ Profile
- Summary of Incentives/Grants/Tax Credits


Business Cover Photo


 Image(s) of business building(s)


Electrical Service


 Image(s) of utility entrance: ____Overhead ____Underground

 Image(s) of utility electric meter(s) and notes on aerial drawing of property. Take a distance image and a close up to read meter information.

 Image(s) of electrical system. Switch gear, load centers, disconnects etc. Take note of all nameplates. Remove face plate of load centers up to 200 amps and take image.



 Image(s) of potential inverter location(s). Sketch the wall(s) with dimensions. Note wall construction (2x4 on drywall, cinder block, poured concrete, etc.).

 Image of transformer.

 Image(s) of potential conduit runs.



Potential Array Site #1

Note distances from main electric service to potential array site on printed aerial imagery.

ROOFTOP ARRAY	
Array azimuth	
Roof pitch	
Available roof area (sq. ft.) (use aerial image)	
Roofing material (Be specific. If steel, sketch profile dimensions.) 	
Roof structure. Truss/rafter material size/spacing OC. Sketch layers of roofing thickness. 	
Roof access inside	
Roof condition and age	
Ballasted or fastened. Address methodology and issues.	
Equipment needed for access (lift)?	
Obstructions to solar window. Note dimensions and location on aerial image.	
Length of internal/external conduit run.	
Dead load/live load	
GROUND ARRAY	
Available ground area (sq. ft.)	
Type of soil	
Topography variances. Indicate on aerial image.	
Trench obstacles	
Keep or haul pier spoils?	
Equipment access (concrete, lift)	



Potential Array Site #2

Note distances from main electric service to potential array site on printed aerial imagery.

ROOFTOP ARRAY	
Array azimuth	
Roof pitch	
Available roof area (sq. ft.) (use aerial image)	
Roofing material (Be specific. If steel, sketch profile dimensions.) 	
Roof structure. Truss/rafter material size/spacing OC. Sketch layers of roofing thickness. 	
Roof access inside	
Roof condition and age	
Ballasted or fastened. Address methodology and issues.	
Equipment needed for access (lift)?	
Obstructions to solar window. Note dimensions and location on aerial image.	
Length of internal/external conduit run.	
Dead load/live load	
GROUND ARRAY	
Available ground area (sq. ft.)	
Type of soil	
Topography variances. Indicate on aerial image.	
Trench obstacles	
Keep or haul pier spoils?	
Equipment access (concrete, lift)	



Potential Array Site #3

Note distances from main electric service to potential array site on printed aerial imagery.

ROOFTOP ARRAY	
Array azimuth	
Roof pitch	
Available roof area (sq. ft.) (use aerial image)	
Roofing material (Be specific. If steel, sketch profile dimensions.) 	
Roof structure. Truss/rafter material size/spacing OC. Sketch layers of roofing thickness. 	
Roof access inside	
Roof condition and age	
Ballasted or fastened. Address methodology and issues.	
Equipment needed for access (lift)?	
Obstructions to solar window. Note dimensions and location on aerial image.	
Length of internal/external conduit run.	
Dead load/live load	
GROUND ARRAY	
Available ground area (sq. ft.)	
Type of soil	
Topography variances. Indicate on aerial image.	
Trench obstacles	
Keep or haul pier spoils?	
Equipment access (concrete, lift)	

Potential Array Site #4

Note distances from main electric service to potential array site on printed aerial imagery.

ROOFTOP ARRAY	
Array azimuth	
Roof pitch	
Available roof area (sq. ft.) (use aerial image)	
Roofing material (Be specific. If steel, sketch profile dimensions.) 	
Roof structure. Truss/rafter material size/spacing OC. Sketch layers of roofing thickness. 	
Roof access inside	
Roof condition and age	
Ballasted or fastened. Address methodology and issues.	
Equipment needed for access (lift)?	
Obstructions to solar window. Note dimensions and location on aerial image.	
Length of internal/external conduit run.	
Dead load/live load	
GROUND ARRAY	
Available ground area (sq. ft.)	
Type of soil	
Topography variances. Indicate on aerial image.	
Trench obstacles	
Keep or haul pier spoils?	
Equipment access (concrete, lift)	

Internet Information

Internet Service Provider (ISP)	
Type of connection (DSL, Cable, satellite)	
Does modem or router have open ports? Is it wireless?	
If needed, Category 5 run notes	
Network user name and password	

Comments & Observations: