



# Approved Vendor Designee Registration

**Bryan Gower, InClima**

October 23<sup>rd</sup>, 2020

# Approved Vendor Designee Registration

## Agenda

- Introduction
- Registration Process
- Designee Attestation
- Linking Designees to Approved Vendor Accounts and Nesting Approved Vendor Designees
- Account Management/Reports

# Approved Vendor Designee Registration

## Introduction

- What is a Designee?

- Non-Approved Vendor third-party entities working with Approved Vendors that have direct interaction with end-use customers:
  - installers
  - marketing firms
  - lead generators
  - sales organizations
- Section 6.9.1 of the IPA's [Revised Long-Term Plan](#) created a new requirement for Approved Vendor Designees to register with the Adjustable Block Program

# Approved Vendor Designee Registration

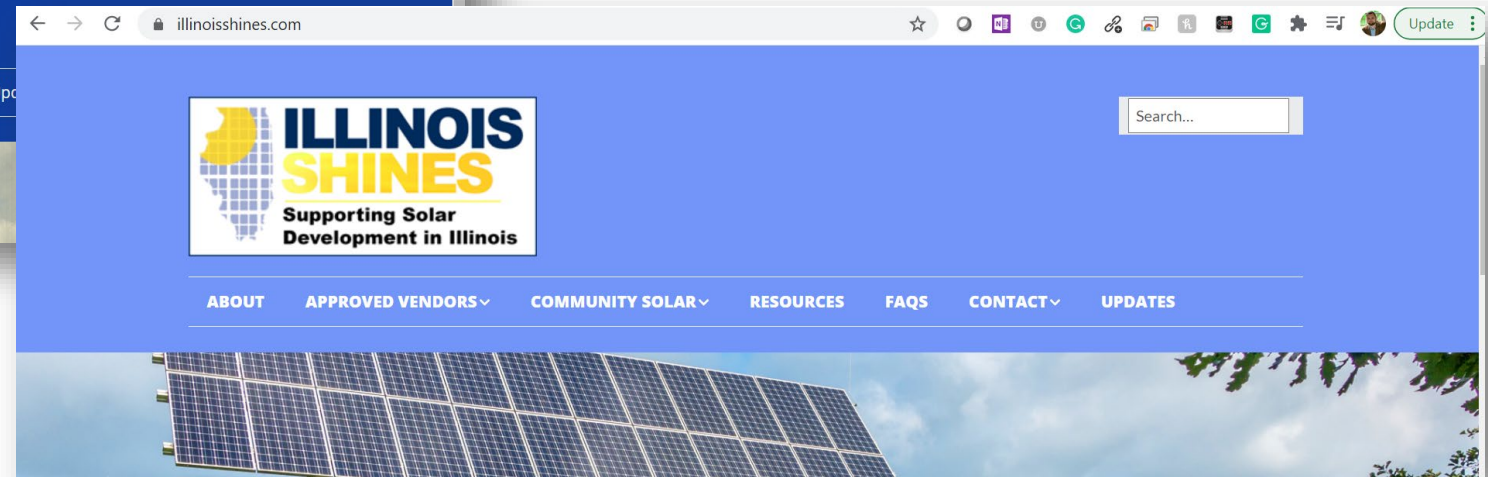
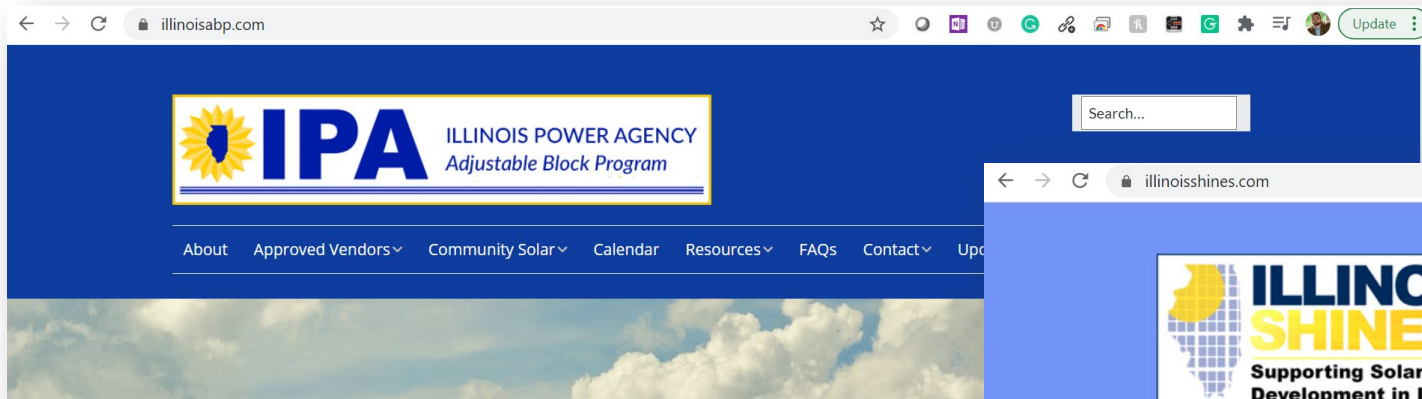
## Introduction

- **Who needs to register as an Approved Vendor Designee?**
  - All third-party entities that have direct interaction with end-use customers of and that operate within the Illinois Adjustable Block Program need to register as an Approved Vendor Designee
- **When do Designees need to be registered?**
  - All Designees, that work within the ABP, must complete the designee registration no later than Thursday, December 10, 2020, which is 45 days from the release date of this functionality: Monday, October 26<sup>th</sup>, 2020

# Approved Vendor Designee Registration

## Introduction

- All Designees will be listed on the program websites along with the Approved Vendor(s) with whom they are working:
  - [www.illinoisabp.com](http://www.illinoisabp.com)
  - [www.illinoisshines.com](http://www.illinoisshines.com)



# Approved Vendor Designee Registration

## What will happen if a Designee fails to register?

- Failure by a Designee to comply with applicable Program requirements could subject the Designee to disciplinary action including suspension or termination
- If the Designee ignores a suspension or termination decision made by the Program Administrator or the IPA and continues its market activity nonetheless, any Approved Vendor or Designee that works with the Designee during that period may be subject to discipline
- Approved Vendors and Designees found to be working with entities that fail to register as Designees with the Program may be subject to discipline

# Registration Process

## Registration

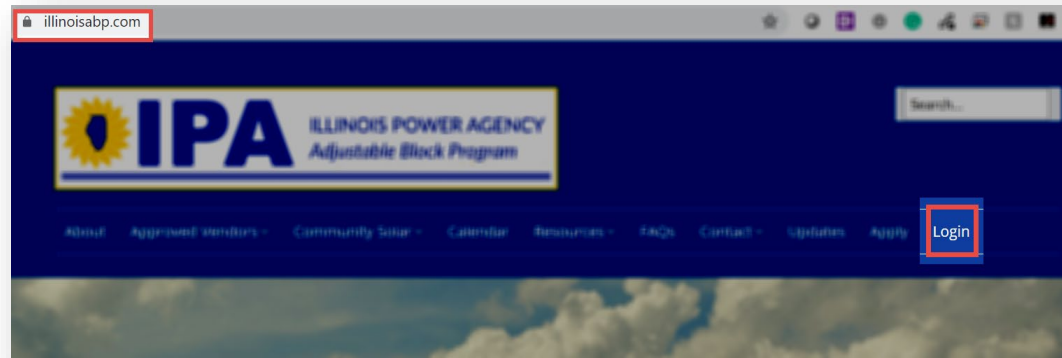
- All Designees must be self registered by an authorized representative from the Designee's organization
- The Adjustable Block Program provides two ways to link a designee to an Approved Vendor account:
  - Submit Request to an Approved Vendor to become their Designee
  - Nested Designees (i.e. Designees can link Designees that have no other role in the portal)
- As part of registration, Designees are required to complete an attestation
- The Designee can view their attestation and reports to manage their roles and designations



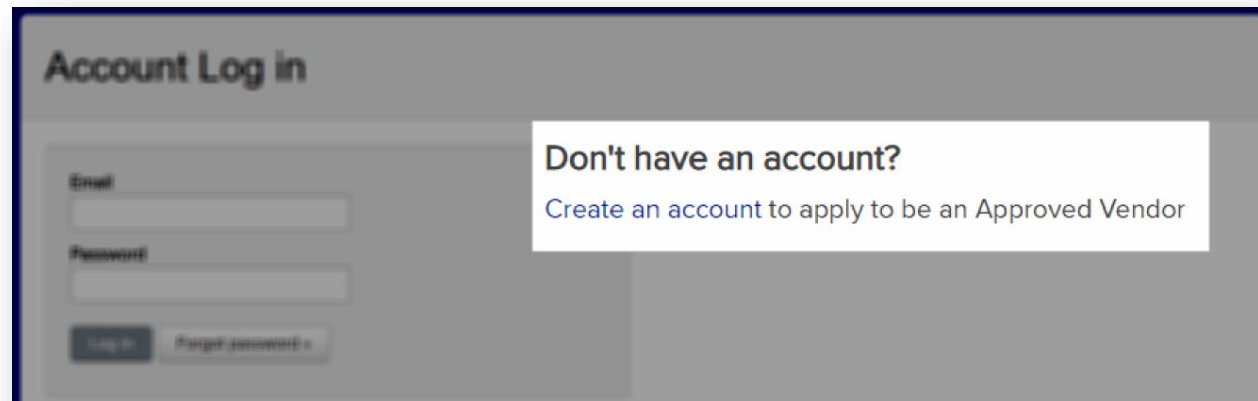
# Approved Vendor Designee Self Registration

# Approved Vendor Designee Self Registration

- Navigate to [IllinoisABP.com](http://IllinoisABP.com), and select the [Login] link



- Create a new account by selecting the [Create an Account] link from the login page



# Approved Vendor Designee Self Registration

- Complete the User Registration and select the [Create Account] button

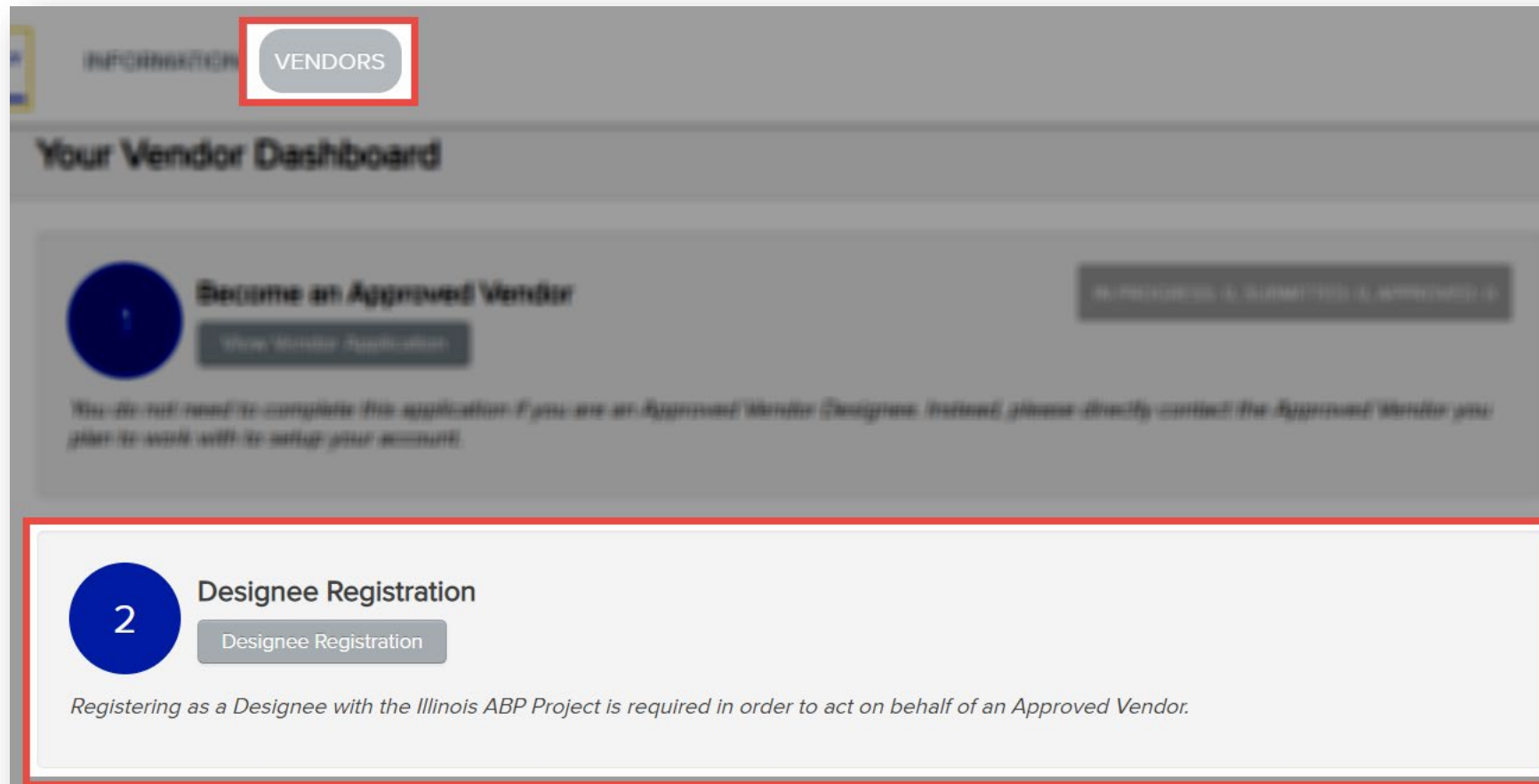
## User Registration

This registration is only for those entities seeking to become an Approved Vendor. Individual solar project owners should contact an Approved Vendor to apply. Only Approved Vendors can submit program application batches and minimum batch size is 100 kW.

<b>Your Login</b>	<b>Your Information</b>	<b>Your Address</b>	<b>Create account!</b>
Email <small>REQUIRED</small>	First Name <small>REQUIRED</small>	Company Name	<input type="button" value="Create Account"/> <input type="button" value="Cancel"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Password <small>REQUIRED</small>	Last Name <small>REQUIRED</small>	Street <small>REQUIRED</small>	
<input type="password"/>	<input type="text"/>	<input type="text"/>	
Confirm Password <small>REQUIRED</small>		Apartment or Suite	
<input type="text"/>		<input type="text"/>	
		City <small>REQUIRED</small>	
		<input type="text"/>	

# Approved Vendor Designee Self Registration

- After the user account is Approved, the Designee Registration can be accessed by selecting the [Designee Registration] button from the **Designee Registration** option in the **Vendors Dashboard**



The screenshot displays the 'Your Vendor Dashboard' interface. At the top, a navigation bar includes a 'VENDORS' button, which is highlighted with a red box. Below the navigation bar, the dashboard is divided into two main sections. The upper section, titled 'Become an Approved Vendor', features a blue circular icon with the number '1' and a 'Become an Approved Vendor' button. The lower section, titled 'Designee Registration', features a blue circular icon with the number '2' and a 'Designee Registration' button. This lower section is highlighted with a red box. Below the 'Designee Registration' button, there is a note: 'Registering as a Designee with the Illinois ABP Project is required in order to act on behalf of an Approved Vendor.'

# Approved Vendor Designee Self Registration

- The Approved Vendor Designee Registration screen provides a disclosure about the purpose of the Designee registration and the Designee's responsibility comply with all program requirements

## Type of Designee (select all that apply)

- **Disclosure Form Designee** - An entity that is permitted to generate Disclosure Forms on behalf of an Approved Vendor
- **Community Solar Subscriber Designee** - An entity that is permitted to manage the community solar subscription information for an Approved Vendor's community solar projects
- **Marketing or Sales Designee** - An entity that is designated to act as a marketing agent and/or customer acquisition agent on behalf of an Approved Vendor or Designee. This includes, among others, entities that engage in solicitations through any channel (in-person, telephone, etc.), as well as entities that perform online lead generation services
- **Installer Designee** - An entity that has been designated to install systems on behalf of an Approved Vendor or Designee

### Register as a Designee

Type of Designee **REQUIRED**

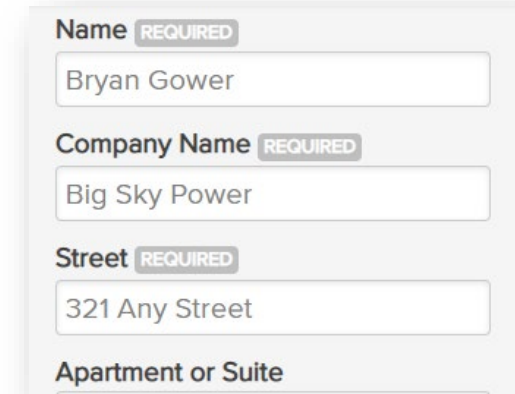
Disclosure Form Designee  
CS Subscriber Agent  
Installer  
Marketing or Sales Organization

Select all that apply. Hold Ctrl on PC (command on Mac) to make multiple selections.

Note: The IPA and Program Administrator reserve the right to add or remove roles as needed over time

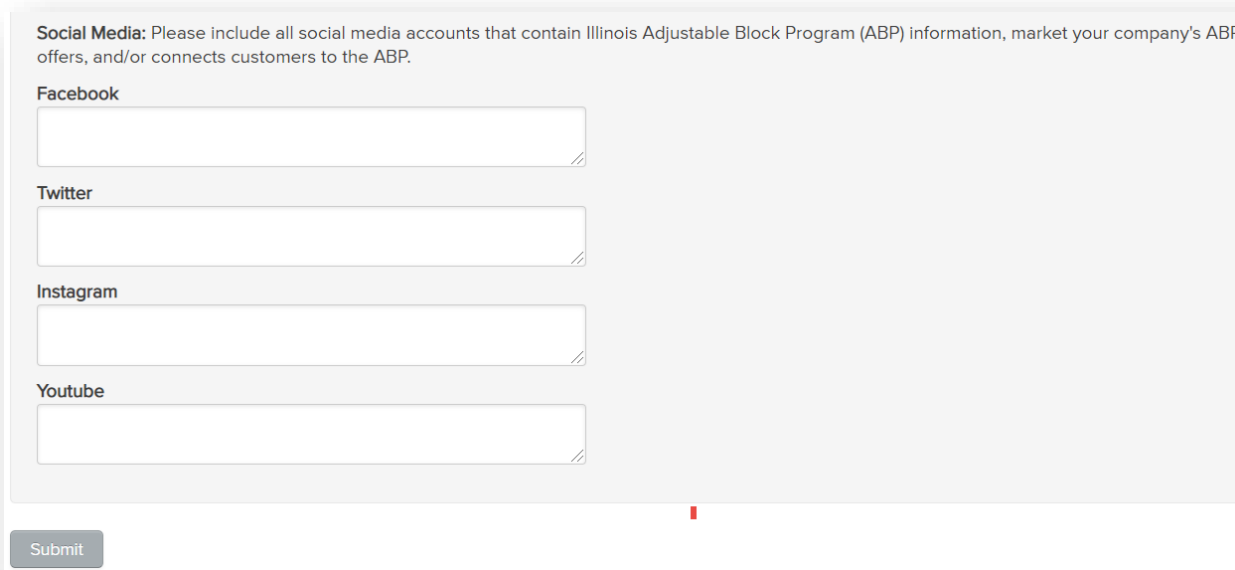
# Approved Vendor Designee Self Registration

- **Name and Company Contact Information** – Confirm the information from the User Registration is correct



A screenshot of a registration form with the following fields:

- Name** REQUIRED: Bryan Gower
- Company Name** REQUIRED: Big Sky Power
- Street** REQUIRED: 321 Any Street
- Apartment or Suite**: (empty field)



**Social Media:** Please include all social media accounts that contain Illinois Adjustable Block Program (ABP) information, market your company's ABP offers, and/or connects customers to the ABP.

**Facebook**

**Twitter**

**Instagram**

**Youtube**

Submit

**Social Media** - include all social media accounts that contain Illinois Adjustable Block Program (ABP) information, market your company's ABP offers, and/or connects customers to the ABP

- Submit the Registration to access and complete the Designee Attestation

# Designee Attestation

# Designee Attestation

- Designee Registration Attestation
  - Insert your initials to each of the listed attestations for your approval and ongoing participation as an Approved Vendor Designee ("Designee") in the Illinois Adjustable Block Program
  - Download the Marketing Guidelines and Program Guidebook using the links provided in the second attestation

**Illinois Adjustable Block Program**

**Designee Registration Attestation** [Return to Designee Registration](#)

*Please initial all items below*

We hereby agree to the following terms and conditions for our approval and ongoing participation as an Approved Vendor Designee ("Designee") in the Illinois Adjustable Block Program ("ABP"):

- We have reviewed and commit to comply with all ABP requirements applicable to our work as a Designee.
- We have read, understand, and will abide by the Program's [Marketing Guidelines, Program Guidebook](#), and associated materials, and commit to ensuring that our employees and any agents operating on our behalf are trained to understand and abide by these requirements.
- We acknowledge that, subject to our approval as a Designee by one or more Approved Vendors, we will be listed in a public database of Designees on both the ABP website (illinoisabp.com) and the Illinois Shines website (illinoisshines.com).
- We will maintain accurate, current, and comprehensive registration information related to our business relationship with Approved Vendors.
- We acknowledge the action from the IPA on whose behalf the Designee.

Additionally, through the Designee.

**Designee Registration Attestation** [Return to Designee Registration](#)

*Please initial all items below*

We hereby agree to the following terms and conditions for our approval and ongoing participation as an Approved Vendor Designee ("Designee") in the Illinois Adjustable Block Program ("ABP"):

- We have reviewed and commit to comply with all ABP requirements applicable to our work as a Designee.
- We have read, understand, and will abide by the Program's [Marketing Guidelines, Program Guidebook](#), and associated materials, and commit to ensuring that our employees and any agents operating on our behalf are trained to understand and abide by these requirements.



# Designee Attestation

- Submit Electronic Signature
  - Print your name into the Signature and Print Name lines
  - Report your Job Title
  - Submitted Attestations will be logged in the database with your IP Address and identification information you report into this form

Additionally, through my execution below, I assert that I have the authority to enter into binding agreements on behalf of this Designee.

Electronic Signature:

Print Name:

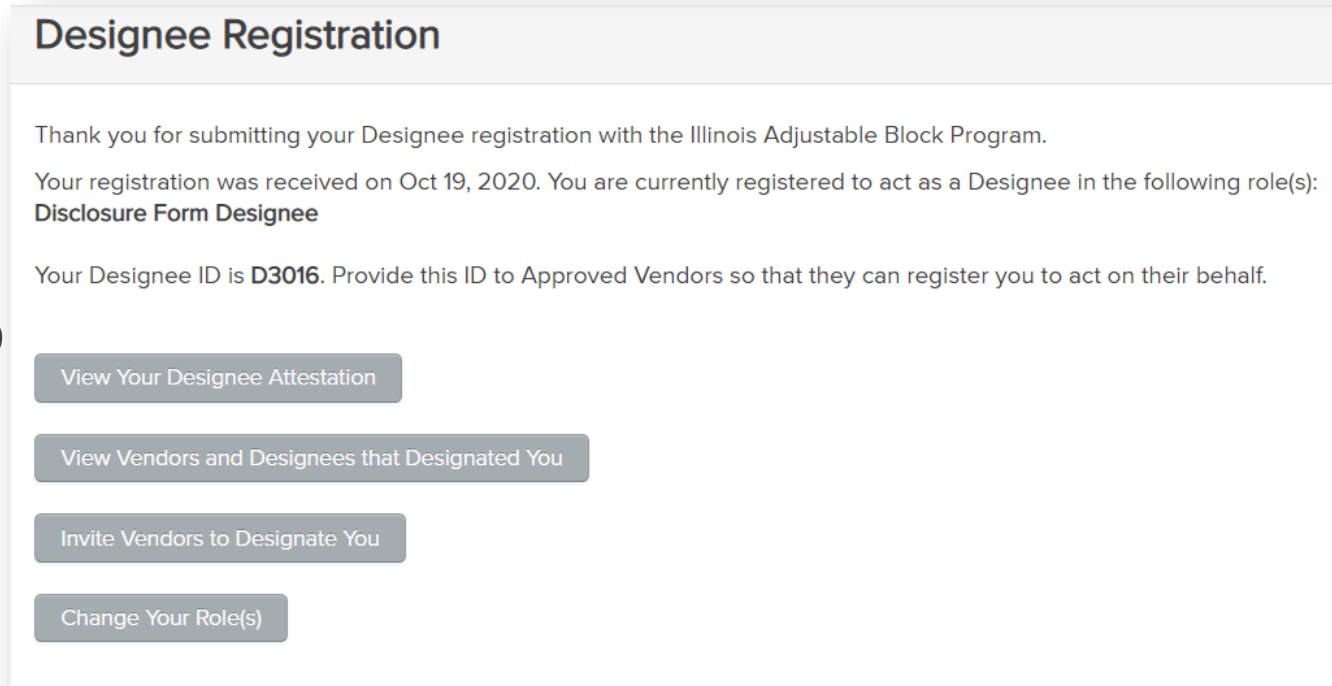
Title:

Company:

Date:

# Designee Attestation

- Designee Registration Confirmation
  - When the Designee registration and attestation have been submitted successfully, a confirmation page will confirm:
    - the Date the registration was received
    - the Designee Type you designated
    - the Designee ID to provide to Approved Vendors and other Designees you work under so that they can link your account
- The registration page allows you to view reports to:
  - View Your Designee Attestation (PDF)
  - View Vendors and Designees that Designated You
  - Invite Vendors to Designate You
  - Change your Role(s)



**Designee Registration**

Thank you for submitting your Designee registration with the Illinois Adjustable Block Program.

Your registration was received on Oct 19, 2020. You are currently registered to act as a Designee in the following role(s):  
**Disclosure Form Designee**

Your Designee ID is **D3016**. Provide this ID to Approved Vendors so that they can register you to act on their behalf.

[View Your Designee Attestation](#)

[View Vendors and Designees that Designated You](#)

[Invite Vendors to Designate You](#)

[Change Your Role\(s\)](#)

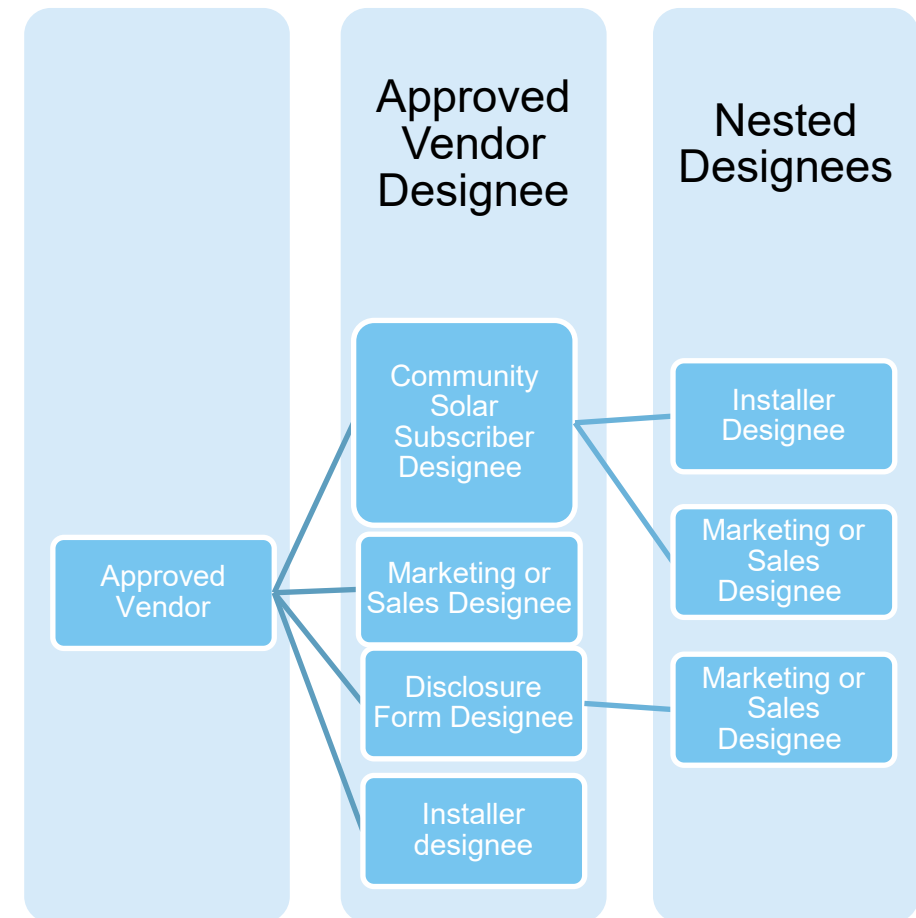
# Linking Designees to Approved Vendor Accounts and Nesting Approved Vendor Designees

# Linking Designees to Approved Vendor Accounts

- Once a Designee has registered in the portal, they should then contact each Approved Vendor they work with so that the Approved Vendor can link the Designee to their account
- Requests to link a Designee account can take place
  - outside of the portal (i.e. email)
  - a Designee may request that an Approved Vendor add it as a Designee from within the portal using the [Invite Vendors to Designate You] button from the **Designee Registration Screen**
- A new Designee is not authorized to act in the indicated role until affirmatively accepted by one or more Approved Vendors

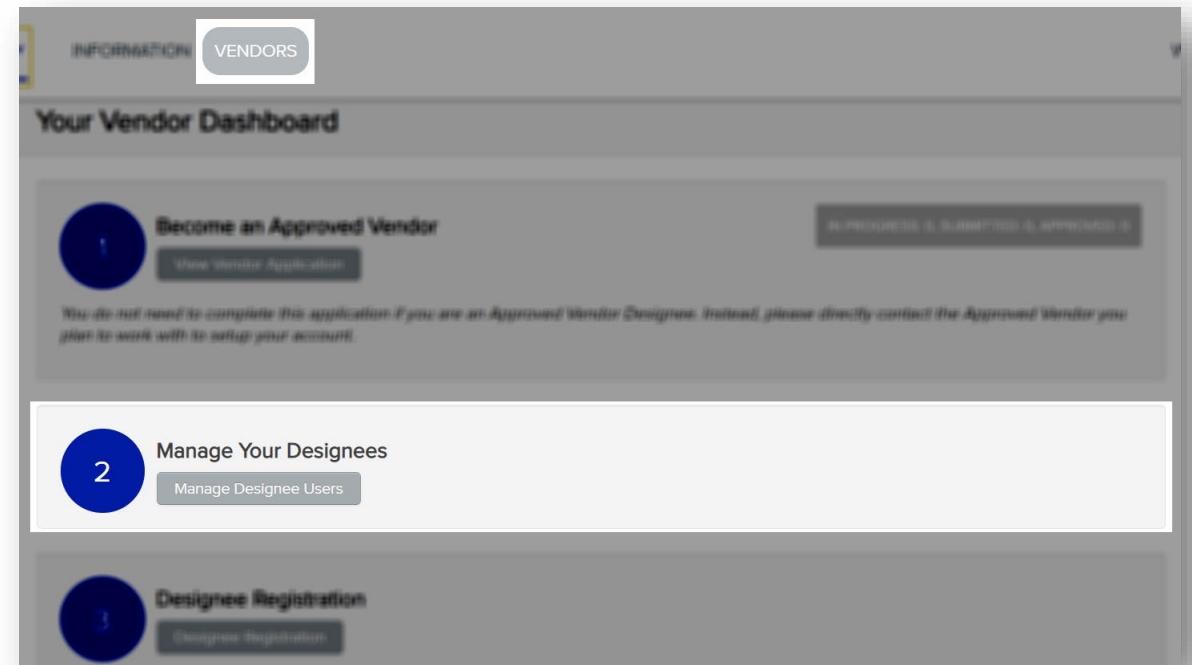
# Linking Designees to Approved Vendor Accounts

- Approved Vendors can add their registered Designees under their account from their **Vendor Dashboard** using their **Manage Approved Vendor Designees** option
- Referred to as Nested Designees, Designees can link registered third-party vendors they work with that may not directly work with an Approved Vendor as a Nested Designee under their account. These third-party vendors may have no other role in the portal (i.e. marketing firms and installers)



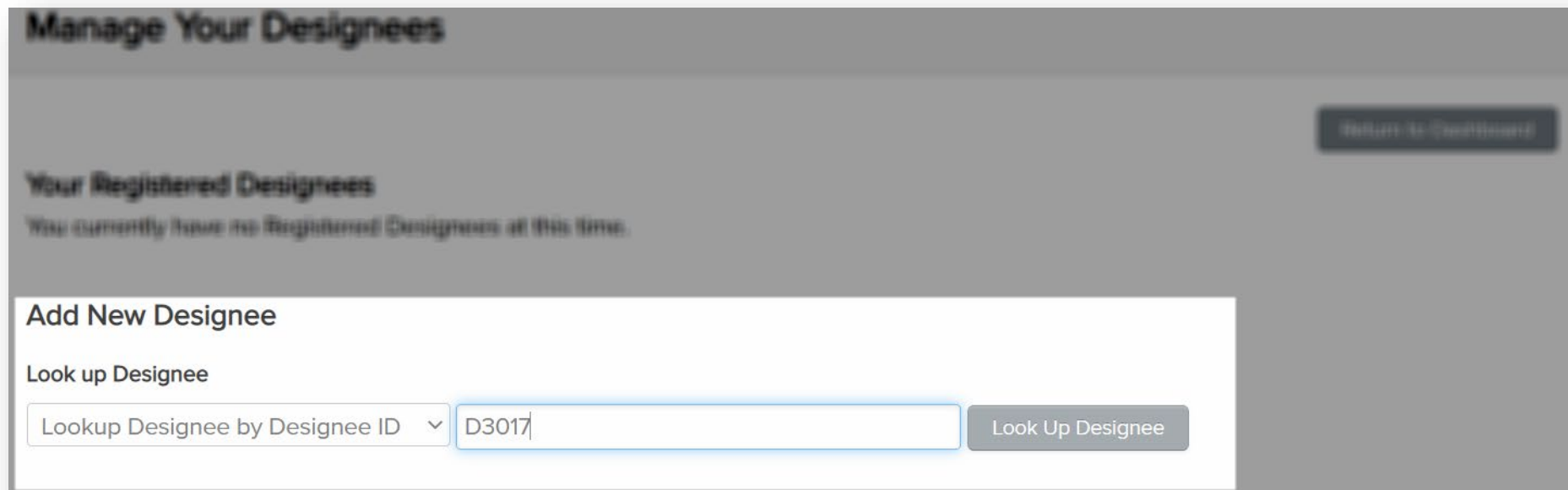
# Linking Designees to Approved Vendor Accounts

- Approved Vendors can add their registered Designees under their account from their **Vendor Dashboard**
- To link a Nested Designee, access the [Manage Designee Users] button from the **Manage Your Designees** option located on the **Vendor Dashboard**
- Approved Vendors can Add Designees using their **Manage Approved Vendor Designees** option



# Linking Designees to Approved Vendor Accounts

- From the **Manage Your Designees** page, under the **Add New Designee** section, select [Lookup Designee by Designee ID] or [Lookup Designee by Designee Email] and enter the Designee ID or Email for your Designee
- Select the [Look Up Designee] button to find your Designee
- If no results, check the ID with your Designee



The screenshot shows the 'Manage Your Designees' interface. At the top right, there is a 'Return to Dashboard' button. Below the header, it says 'Your Registered Designees' and 'You currently have no Registered Designees at this time.' The 'Add New Designee' section is highlighted with a white background. It contains the text 'Look up Designee' above a search form. The search form has a dropdown menu with 'Lookup Designee by Designee ID' selected, a text input field containing 'D3017', and a 'Look Up Designee' button.

# Linking Designees to Approved Vendor Accounts

- Review the Designee profile to ensure the correct Designee has been selected
- Confirm the type of Designee
- Select [Give Designee Role(s)]
- The Designee roles can be edited at anytime by revisiting this screen

## Your Registered Designees

You currently have no Registered Designees at this time.

## Add New Designee

### Registered Designee Found

Name: David Gower

Company: Lunar Power

Designee ID: D3017

Email: bryan.gower+test2@inclimesolutions.com

### Type of Designee

Installer

Select all that apply. Hold Ctrl on PC (command on Mac) to make multiple selections.

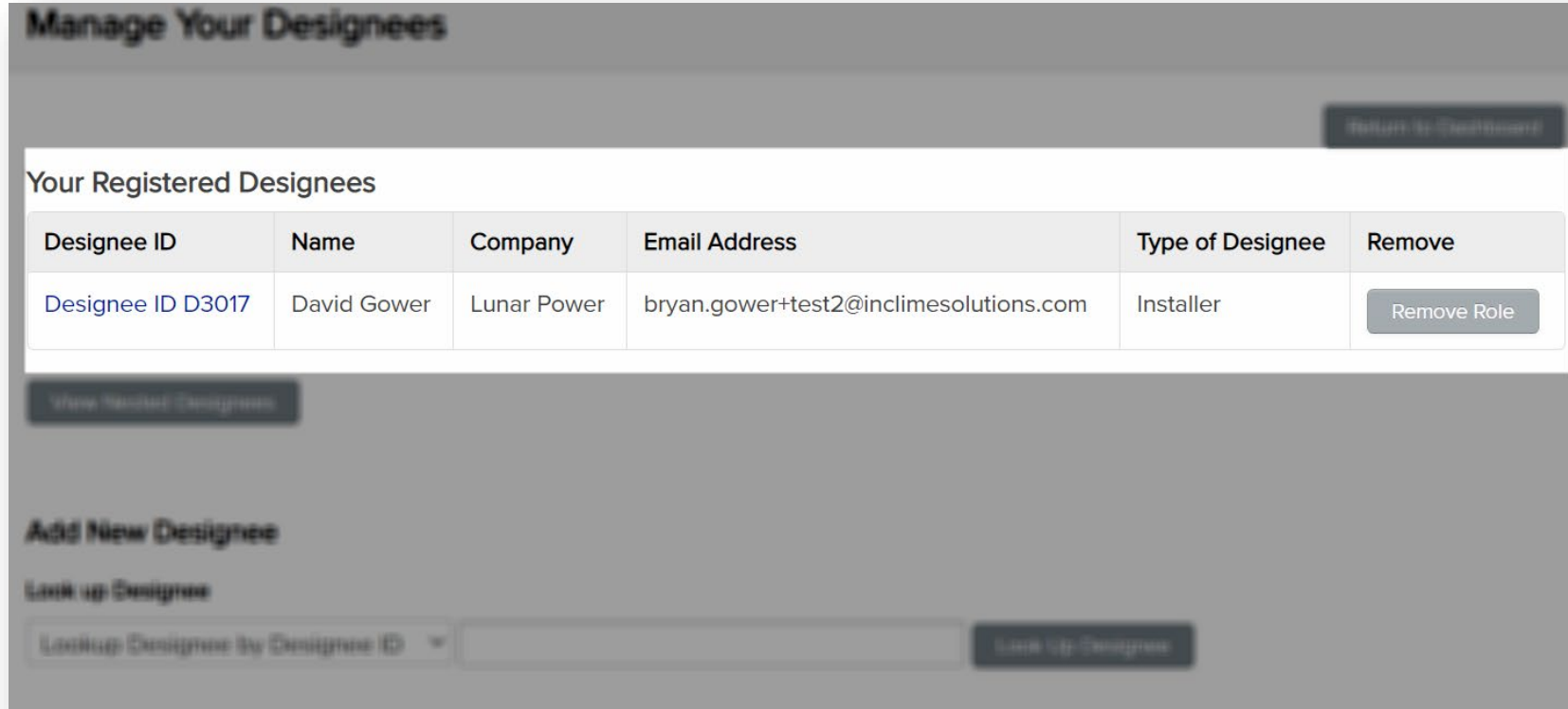
Give Designee Role(s)

Go Back



# Linking Designees to Approved Vendor Accounts

- Review the registered Designees from **the Manage Your Designees** page under the **Your Registered Designees** section
- A [Remove Role] button is available if you need to remove a Designee



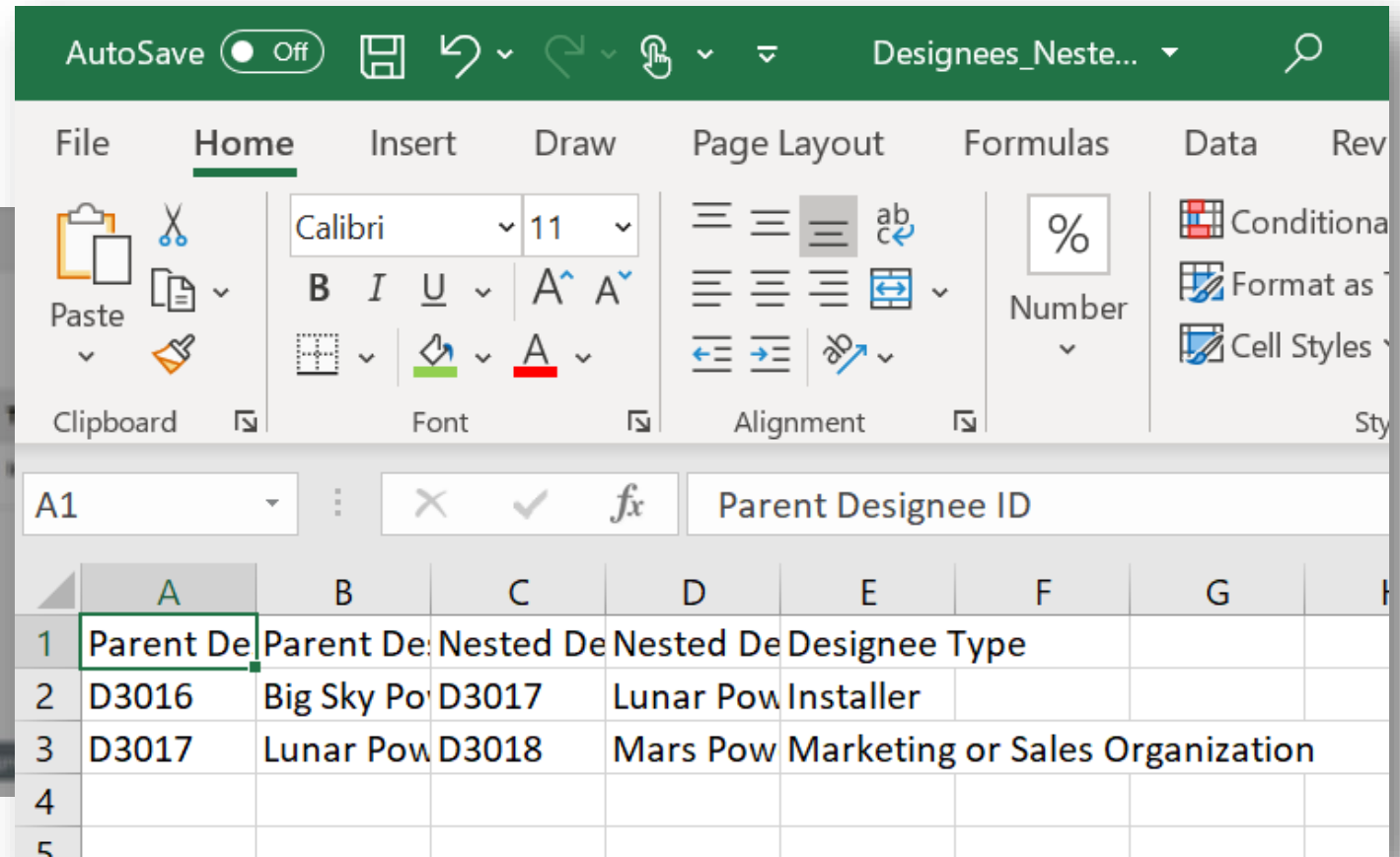
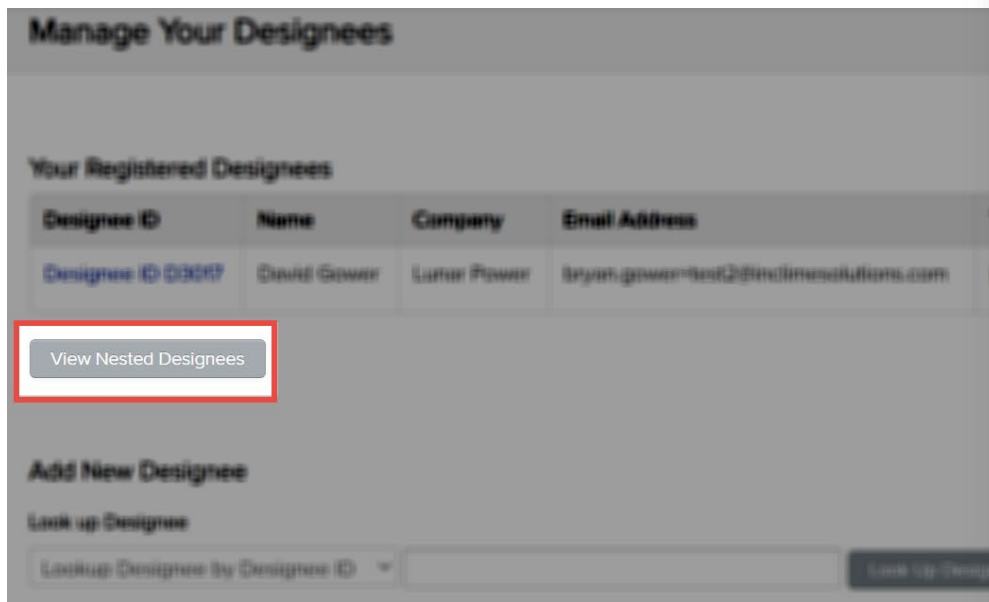
The screenshot displays the 'Manage Your Designees' interface. At the top right, there is a 'Return to Dashboard' button. Below the header, the section 'Your Registered Designees' contains a table with the following data:

Designee ID	Name	Company	Email Address	Type of Designee	Remove
<a href="#">Designee ID D3017</a>	David Gower	Lunar Power	bryan.gower+test2@inclimesolutions.com	Installer	<button>Remove Role</button>

Below the table, there is a 'View All Designees' button. Further down, the 'Add New Designee' section includes a 'Look up Designee' subsection with a dropdown menu labeled 'Lookup Designee by Designee ID', an input field, and a 'Look up Designee' button.

# Linking Designees to Approved Vendor Accounts

- To review all the registered Designees linked to your account and their Nested Designees, select the [View Nested Designees] button located below the **Your Registered Designees** section of the **Manage Your Designees** dashboard
- A CSV file will download with the list of Nested Designees associated with your account



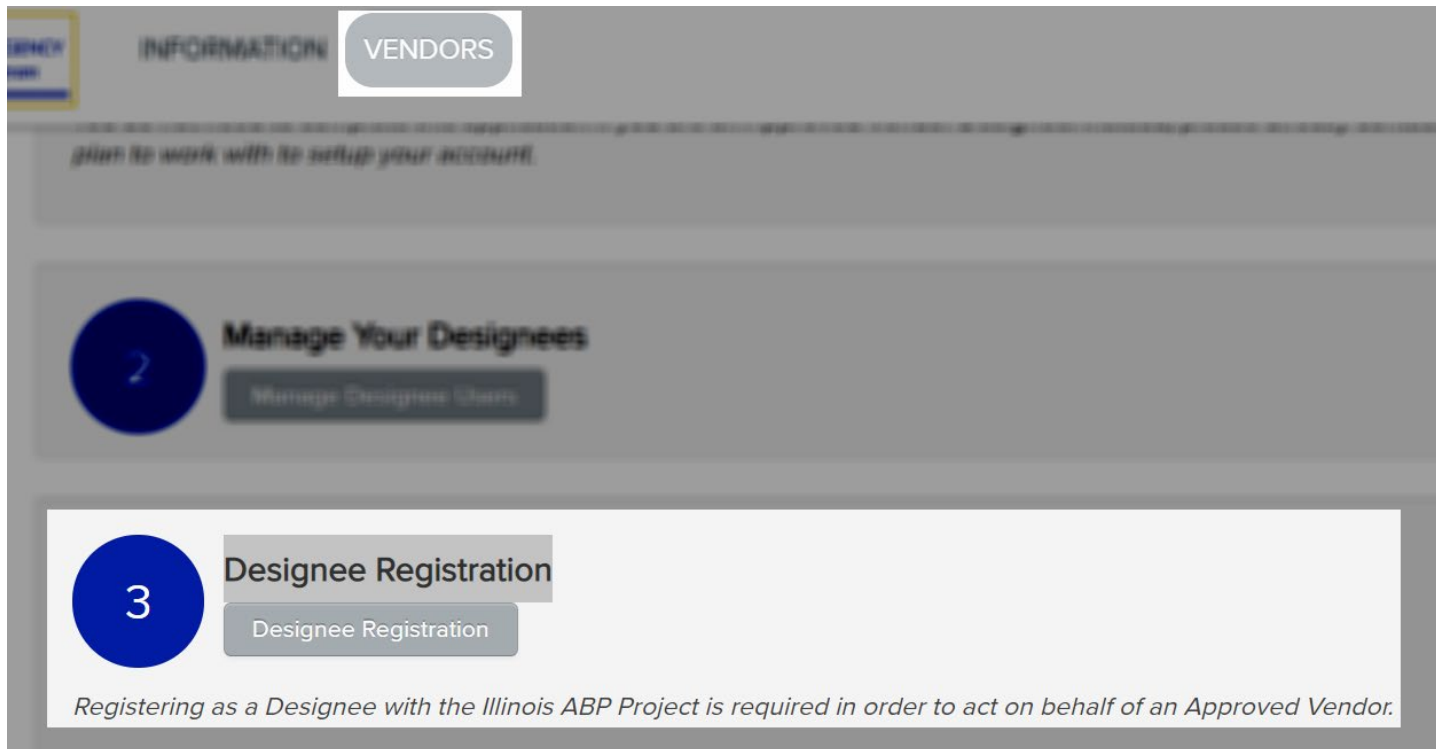
# Account Management

# Account Management

- The Designee Registration page provides additional reports to help you manage the Designees linked to your account:
  - **View Your Designee Attestation (PDF)**
    - A PDF copy of your Designee Attestation
  - **View Vendors and Designees that Designated You**
    - Report of Vendors and Designees that have selected you to act on their behalf
  - **Invite Vendors to Designate You**
    - Send an Approved Vendor an email to designate your account as their Designee
  - **Change your Role(s)**
    - Add or remove Roles designated in your registration

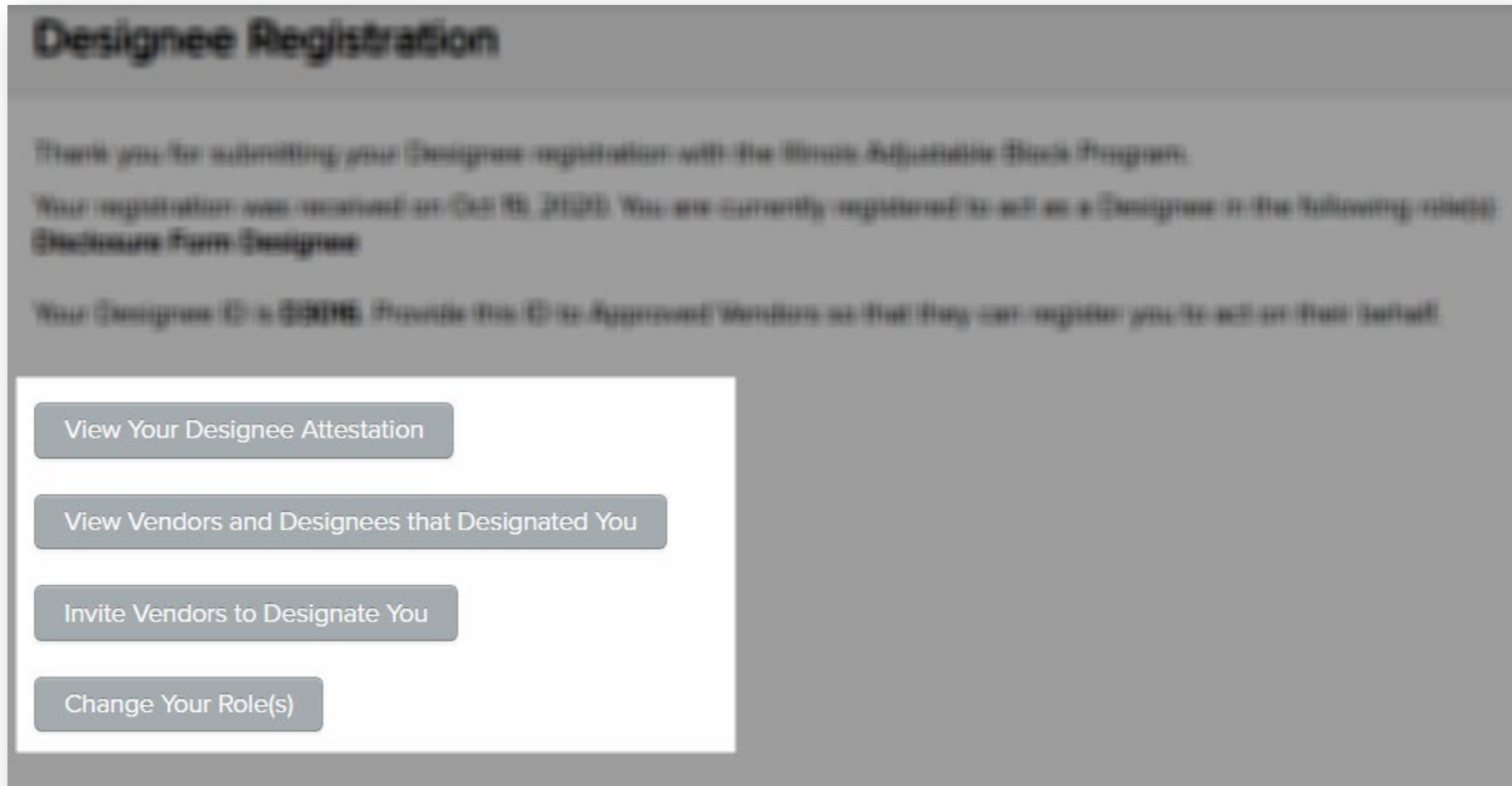
# Account Management

- Designee Registration Reports
  - After the Designee Registration has been submitted, the Designee can access the Designee report functionality by selecting the [Designee Registration] option from the Vendor Dashboard



# Account Management

- Select the desired report from the Designee Registration Screen using the buttons provided



**Designee Registration**

Thank you for submitting your Designee registration with the Illinois Adjustable Block Program.

Your registration was received on Oct 16, 2023. You are currently registered to act as a Designee in the following role(s):

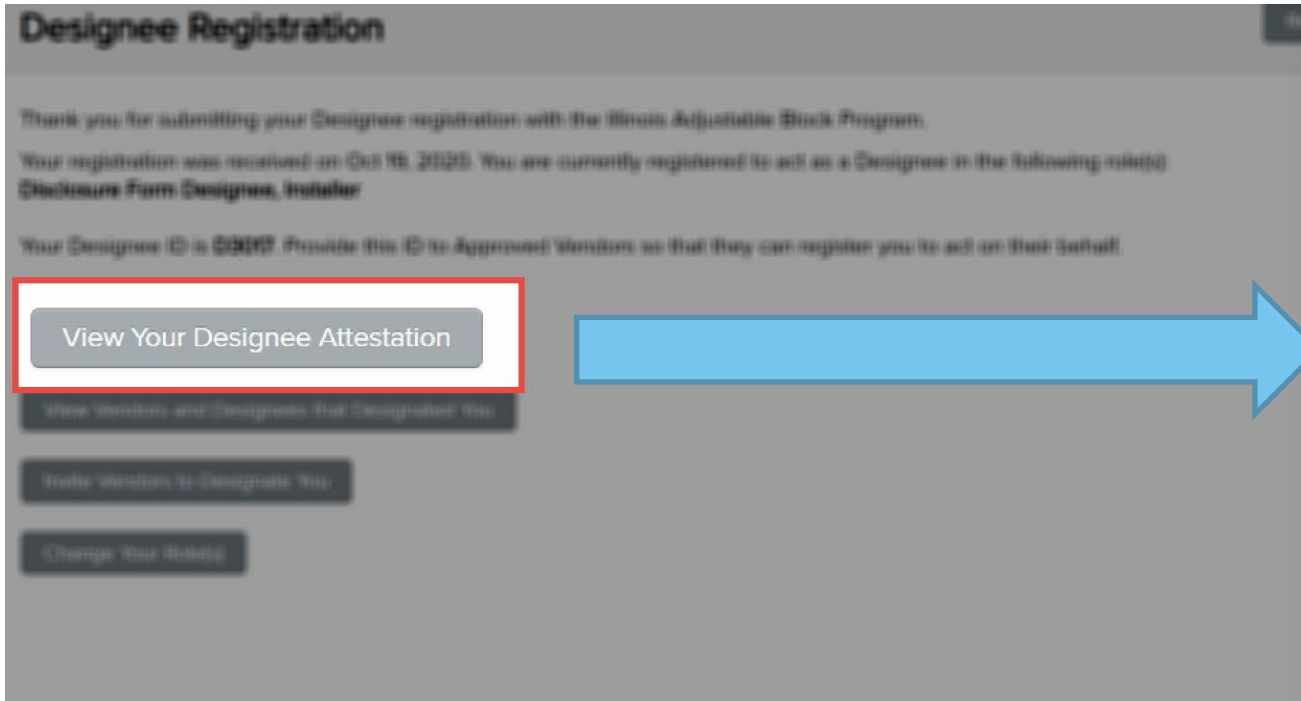
**Structure Form Designee**

Your Designee ID is **00000**. Provide this ID to Approved Vendors so that they can register you to act on their behalf.

- View Your Designee Attestation
- View Vendors and Designees that Designated You
- Invite Vendors to Designate You
- Change Your Role(s)

# Account Management

- **View Your Designee Attestation (PDF)**
  - A PDF copy of your Designee Attestation



## Illinois Adjustable Block Program Designee Registration Attestation

BG We have reviewed and commit to comply with all ABP requirements applicable to our work as a Designee.

BG We have read, understand, and will abide by the Program's Marketing Guidelines, Program Guidebook, and associated materials, and commit to ensuring that our employees and any agents operating on our behalf are trained to understand and abide by these requirements.

BG We acknowledge that, subject to our approval as a Designee by one or more Approved Vendors, we will be listed in a public database of Designees on both the ABP website (illinoisabp.com) and the Illinois Shines website (illinoisshines.com).

BG We will maintain accurate, current, and comprehensive registration information related to our business relationships with Approved Vendors and acknowledge this information is subject to review, verification, and acceptance by the Approved Vendor.

BG We acknowledge and accept that Designees that act in violation of ABP requirements are subject to disciplinary action from the IPA which could result in suspension from the ABP of both the Designee and/or any Approved Vendors on whose behalf the Designee ultimately acts.

Additionally, through my execution below, I assert that I have the authority to enter into binding agreements on behalf of this Designee.

Bryan Gower

\_\_\_\_\_  
SIGNATURE

Bryan Gower

\_\_\_\_\_  
PRINT NAME

Manager

\_\_\_\_\_  
TITLE

Big Sky Power - ABP Designee ID D3016

\_\_\_\_\_  
COMPANY

Oct 19, 2020

# Account Management

- **View Vendors and Designees that Designated You**
  - Report of Vendors and Designees that have selected you to act on their behalf
  - Select the Linked ID # to view the profile for the linked Designee

**View Vendors and Designees**

Your Designee ID is D3017

Vendors and Designees that have selected you to act on their behalf

ID	Name	Company
<a href="#">Designee ID D3016</a>	Bryan Gower	Big Sky Power

**Designee Profile**

**Designee D3016**

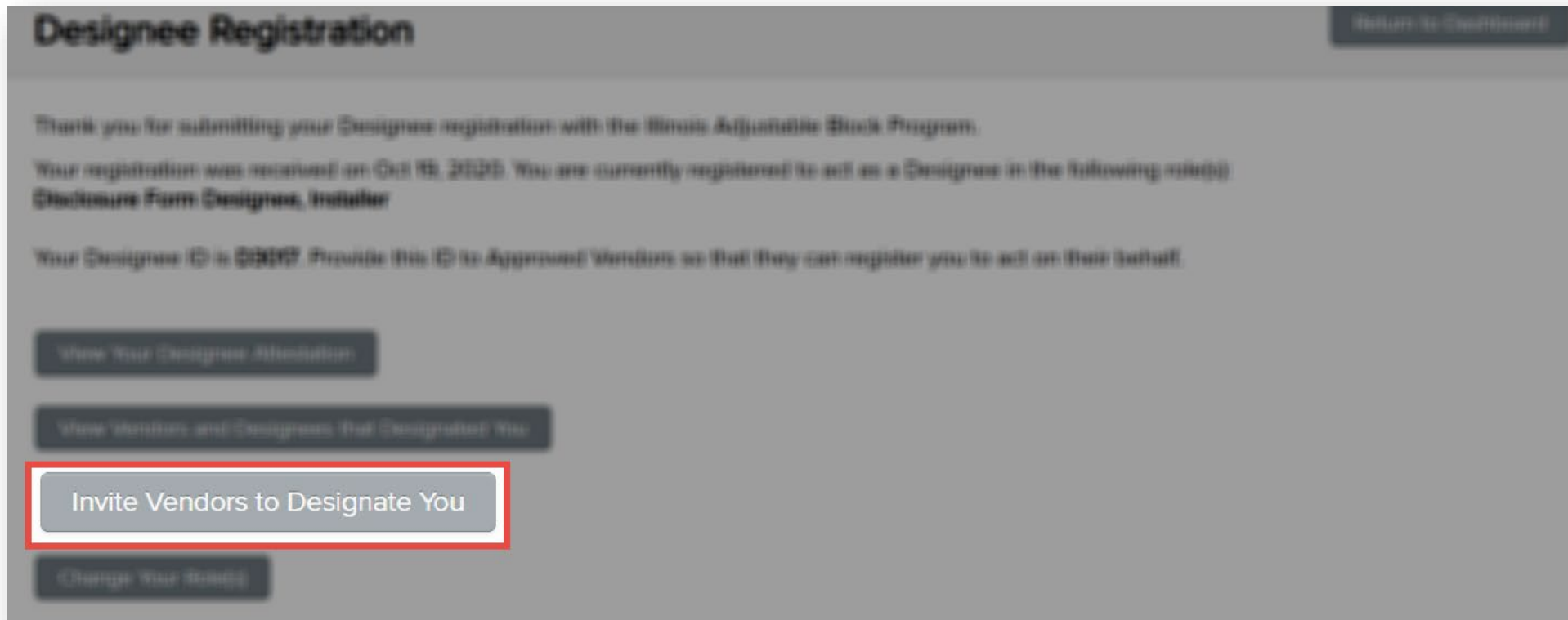
Company Name	Big Sky Power
Address	321 Any Street
State	IL
Zip Code	12345
<b>Primary Point of Contact</b>	
Name	Bryan Gower
Phone	800-900-4565
Email	bryan.gower+test@inclimesolutions.com
<b>Social Media</b>	
Facebook	www.facebook.com/bigskye



# Account Management

- **Invite Vendors to Designate You**

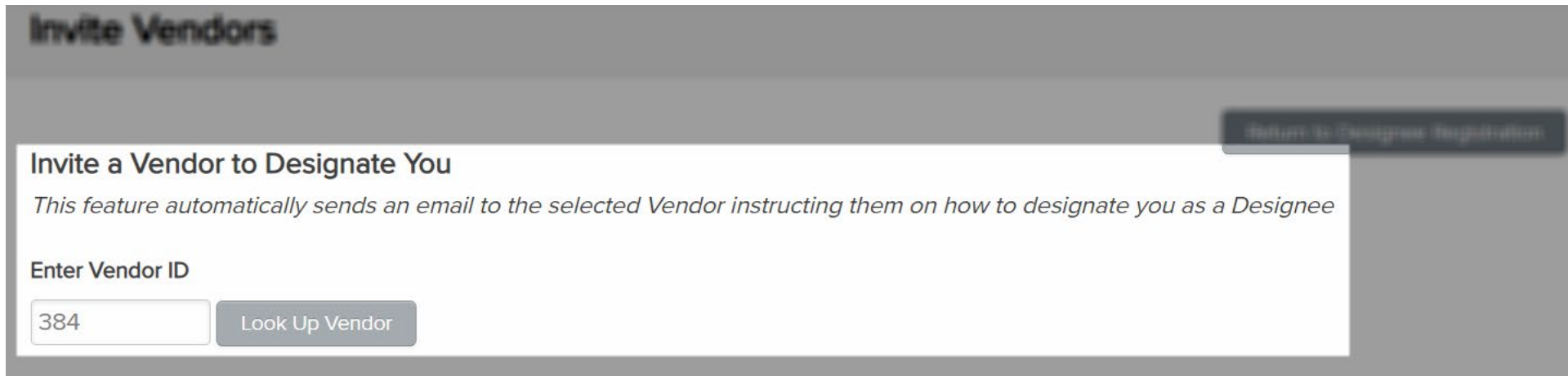
- Send an Approved Vendor an email to designate your account as their Designee



# Account Management

- **Invite Vendors to Designate You**

- Enter the Approved Vendor ID that you would like to invite to designate your company as their designee

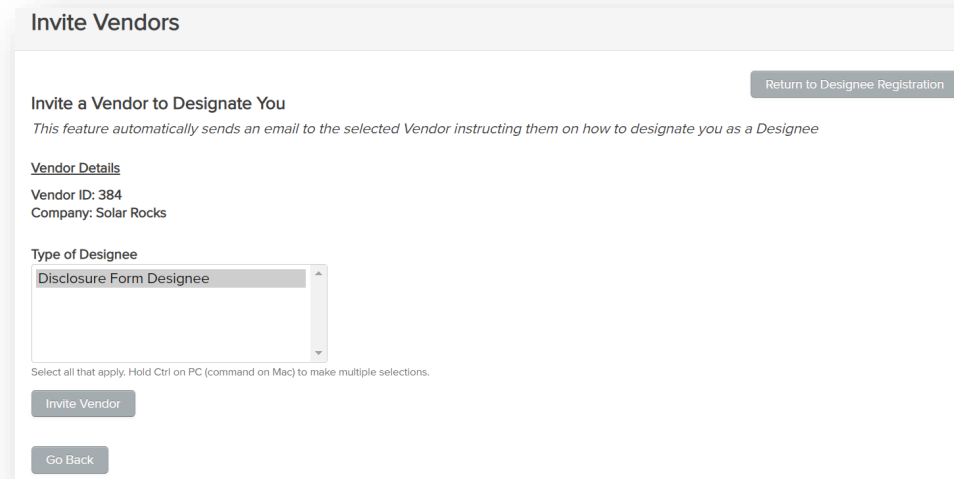


The screenshot shows a web interface titled "Invite Vendors". At the top right, there is a button labeled "Return to Designee Registration". Below this, the main heading is "Invite a Vendor to Designate You", followed by a sub-heading: "This feature automatically sends an email to the selected Vendor instructing them on how to designate you as a Designee". Underneath, there is a label "Enter Vendor ID" above a text input field containing the number "384". To the right of the input field is a button labeled "Look Up Vendor".

# Account Management

- **Invite Vendors to Designate You**

- Review the Approved Vendor details and select the Type of Designee your company is for the Vendor
- Select the [Invite Vendor] button to send an email to the Approved Vendor

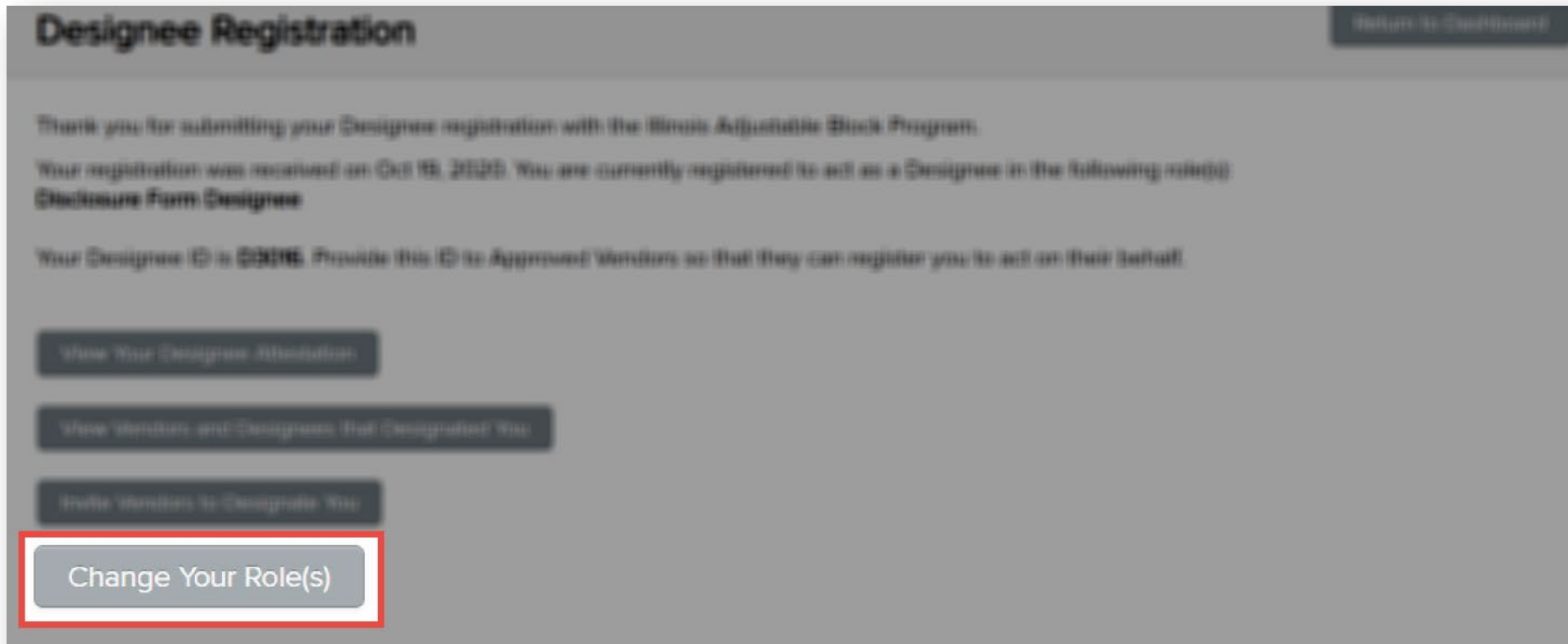


The screenshot shows a web form titled "Invite Vendors". At the top right is a button labeled "Return to Designee Registration". Below the title is the heading "Invite a Vendor to Designate You" and a sub-heading "This feature automatically sends an email to the selected Vendor instructing them on how to designate you as a Designee". Under "Vendor Details", it shows "Vendor ID: 384" and "Company: Solar Rocks". The "Type of Designee" section features a dropdown menu with "Disclosure Form Designee" selected. Below the dropdown is a note: "Select all that apply. Hold Ctrl on PC (command on Mac) to make multiple selections." At the bottom are two buttons: "Invite Vendor" and "Go Back".

- The Approved Vendor will receive an email with a link that takes them directly to the page on which they can add the Designee
- Once accepted, your company's account will be listed as a designee of the Approved Vendor

# Account Management

- **Change your Role(s)**
  - Select the [Change your Role(s)] button to add or remove roles designated in your registration



# Account Management

- **Change your Role(s)**
  - The **Your Designee Role(s)** page provides a definition of each available Role and a selection of each role you would like to associate with your company
  - Select all that apply. Hold Ctrl on PC (command on Mac) to make multiple selections

**Your Designee Role(s)** [Return to Designee Registration](#)

**Definition of Roles**

- Disclosure Form Designee - An entity that is permitted to generate Disclosure Forms on behalf of an Approved Vendor.
- Community Solar Subscriber Designee - An entity that is permitted to manage the community solar subscription information for an Approved Vendor's community solar projects.
- Marketing or Sales Designee - An entity that is designated to act as a marketing agent and/or customer acquisition agent on behalf of an Approved Vendor or Designee. This includes, among others, entities that engage in solicitations through any channel (in-person, telephone, etc.), as well as entities that perform online lead generation services.
- Installer Designee - An entity that has been designated to install systems on behalf of an Approved Vendor or Designee.

**Select Type of Designee** REQUIRED

- Disclosure Form Designee
- CS Subscriber Agent
- Installer
- Marketing or Sales Organization

Select all that apply. Hold Ctrl on PC (command on Mac) to make multiple selections.

**Submit**

**Adjustable Block  
Program Administrator**

***[illinoisabp.com/contact/](http://illinoisabp.com/contact/)***

***[admin@illinoisabp.com](mailto:admin@illinoisabp.com)***

***(877) 783-1820***