



**Questions & Answers  
from the June 28, 2022**

**Approved Vendors  
Informational Webinar**

Energy Solutions is proud and excited to become the new Illinois Shines/Adjustable Block Program (ABP) Program Administrator, and to support Approved Vendors (“AVs”), Designees (“AVDs”), other stakeholders and citizens in growing the Program and increasing the volume of solar development in Illinois. This document has been developed to address the many important questions we received at our 6/28/22 Approved Vendor Informational Webinar, presented with IPA, and provide further information on processes for key activities during the program transition period. Additional questions may be submitted to the Program Administrator at [admin@illinoisabp.com](mailto:admin@illinoisabp.com). The webinar was the first in a series of two initial informational webinars; information for the next webinar is as follows:

### **Wednesday, July 6th from 3-4PM CT**

**Agenda:**

June 28th Webinar Re-Cap

Operational Updates and How-to Demonstrations

What’s Next

Questions and Answers

Join link for 7/6: <https://energy-solution.zoom.us/j/98688734379>

## Key Program Dates

	Disclosure Forms Available	Part I Application Available	Part II Application Available	Disclosure Form API Available
<b>JULY 1</b>	yes	no	no	no
<b>SEPTEMBER 1</b>	yes	yes*	no	yes
<b>NOVEMBER 1</b>	yes	yes	yes	yes

Traditional Community Solar available November 1st

## Transition Period Operations

Legacy Portal	New Portal and July 1 Functionality	SharePoint Processes	Email Processes
Activities AVs are encouraged to finish prior to 7/1 - Extension requests, July REC invoicing	Logins, AV and AVD linkages, Creating Disclosure Forms and In-Process DFs, REC Invoicing, Anticipated future functionality	Annual Reports, Bi-Annual Reports, CSV process for CS Disclosure Forms	Extension requests, Designee requests, Need Info curing and any other questions

## June 28, 2022 Webinar Q&A

### 1. Portal Access

*When will the new Energy Solutions portal be available?*

- As we navigate the complexities of the website and portal transition, Energy Solutions will make the AV and designee portal available by midday July 1, 2022. We appreciate the patience of stakeholders as we execute this important transition milestone.
- The fully operational Energy Solutions portal will be launched on September 1, 2022. Continuous updates on expanded portal functionality will be provided.

*Will the new portal support multiple logins for the same company? Or will it be one login per company?*

- Initially, the new portal will only support the same login used on the legacy portal for both AVs and Designees. Development is planned to allow the new portal to support multiple logins for the same company. This functionality will be live by September 1, 2022.

*If the new portal only supports one individual logged into an ABP account at a time, is it permissible for a designee to register more than one disclosure designee email to allow multiple individuals to process disclosures?*

- We will be allowing for more than one person per company to create logins, but will provide a more detailed answer on the mechanics of this 1:1 closer to the go live date of the new portal on September 1, 2022, when this feature will be available. Registration for new portal accounts (for Designees or AVs) will not be available until September 1, 2022.

*How will Designees get access to the SharePoint portal? (the demo showed how to gain access as an AV). Will AVs provide their Designees the credentials? Or will we get them directly from ES?*

- AVs will need to send a written request to [admin@illinoisabp.com](mailto:admin@illinoisabp.com) to request SharePoint access for their Designees.

## 2. Disclosure Forms

*Are we still able to send residential solar disclosures to homeowners before contract?*

- It is a Program requirement (per Section 5.A of the Program Guidebook) that disclosure forms must be signed by a customer before a contract can be executed. This requirement extends across both Distributed Generation systems and Community Solar subscriptions. This requirement is not changing nor is it impacted by the change in Program Administrators. The portal will allow you to generate disclosure forms for e-signature or wet signature.

*What happens to projects that had a disclosure sent through the disclosure API of the current portal that are not signed by the homeowner before 2pm CST on June 30th?*

- Disclosure Forms that were started, but not generated for customer signature in the legacy portal as of 2pm CT on 6/30/2022, will not be moved forward. Forms that have been generated and sent to customers for signature can be submitted back to the Program during the pause.

*Would the Program consider any relief for the residential segment during this transition period? We have proposed, allowing electronic signatures outside of the portal, a temporary stay on Section 5(a) of the Program Guidebook or to ensure the new portal has CSV capabilities on or shortly thereafter July 1, 2022?*

- The Program Administrator will begin testing the CSV and API options for DG projects in early-August for an anticipated mid-August release.

*The slide says data will be brought over from the legacy portal, but what will happen to forms that are not “Completed”?*

- Disclosure forms with status Submitted, Awaiting Signature, or Complete will carry over. Disclosure forms that were in progress and not generated will not be carried over.

*From July 1st to Sept 1st, will Designees be able to create new Community Solar (CS) disclosure forms using the new portal? Or will we use the SharePoint process for CS disclosure forms?*

- Designees can create new Community Solar disclosure forms either by individually keying in a disclosure form in the new platform, or via CSV process in SharePoint.

*When will we get the demo of the SharePoint csv upload of disclosures forms? Will this be covered during the July 6th webinar?*

- Yes, Energy Solutions will provide a demo of the CSV process for Community Solar projects, as well as demo the portal for disclosure forms activities, as part of the July 6th, 2022 webinar.

*What changes, if any, should we expect with the disclosure form API, and when will that information become available?*

- API Disclosure form functionality will be available for testing in early August, with an anticipated mid-August release. More information will be shared in the coming weeks.

*Can a disclosure form be presented in the same DocuSign envelope as a contract? As long as it is presented in pages before the contract?*

- This needs to be discussed directly with the Program Administrator.

So homeowners can only wet sign disclosures? We can't have them sent out electronically?

- The Program Administrator will be integrating HelloSign to offer an e-signature option for disclosure forms generated by July 5, 2022. Wet sign will also be an option; just as before, they will need to be uploaded to the portal by the AV or AVD once signed.

### **3. Questions related to CSV access for Community Solar and Distributed Generation projects**

*When will the CSV generation of forms go live? Will that be available immediately?*

- The CSV upload function will not be immediately available, but is targeted for a mid-August release for Distributed Generation projects. During the transition, the Program Administrator is offering a SharePoint-based solution, to create disclosure forms using a CSV template for Community Solar Disclosure Forms.

*Does the Agency or Energy Solutions have details on how they expect an approved designee with nested designees conducting residential sales to obtain an executed disclosure in accordance with all Program requirements, including Section 5(a) of the Program Guidebook? Nested designees are not eligible to generate disclosure forms and designees are not always in the home during the sale.*

- Per see Section G of the Program Guidebook:

*“A Nested Designee may hold only Marketing or Sales Designee or Installer Designee roles. Nested Designees may not hold Disclosure Form Designee or Community Solar Subscriber Agent Designee roles. This requirement exists to prevent a Designee from giving another Designee the ability to generate Disclosure Forms or manage community solar subscribers on behalf of the parent Designee’s Approved Vendor. Only Approved Vendors can add Disclosure Form Designees and Community Solar Subscriber Agent Designees directly beneath their Approved Vendor account.”*

Per Program requirements, a Disclosure Form needs to be generated by the Approved Vendor or primary Designee, not the Nested Designee. If the Nested Designee wishes the ability to generate Disclosure Forms on the behalf of an AV, then they may become designated as a primary Designee for the at Approved Vendor, at the AV’s approval. Alternatively, the nested Designee and primary Designee can develop a process where the primary Designee generates the Disclosure Form for the customer as they see fit, as long as this process is in compliance with Program requirements, including the requirement that the Disclosure Form must be signed prior to the execution of any installation, lease, PPA, or Community Solar subscription agreement.

*Are the CSV project files downloadable from SharePoint updated on a set schedule, or will they be continuously updated?*

- They will be updated on a weekly basis. The program administrator would like more clarity on the intent of this question, and will reach out for more information.

*Is the disclosure form process the same for Distributed Generation and Community Solar during the pause?*

- The process for signing the disclosure form prior to installation, lease, PPA, or Community Solar subscription remains the same, and we expect AVs and AVDs to remain in compliance with the process as outlined in the Program Guidebook, including the requirement that a DF must be signed before a contract/agreement. Generation of disclosure forms will originate from either the Energy Solutions portal or via Sharepoint using the CS CSV workaround. More information on the DF process will be provided in the July 6, 2022 webinar.

*Can you clarify what Community Solar disclosure form functionality will be available in the new portal July 1st (vs. Sept)? (Also, will the new portal allow bundling multiple subscriptions in one email envelope to larger commercial customers on July 1st or later)*

- The SharePoint workaround for the CS DFs will be available from 7/1/22–9/1/22. Signature bundling for larger commercial customers only will not be immediately available. This is planned as a portal enhancement to be released later this calendar year.

#### **4. Approved Vendor Management**

*Will we be able to alter AV and Designee relationships during the closure (add Designees, remove Designees)?*

- Yes, Designee changes can be submitted via email to the Program Administrator. The Program Administrator will use a Designee Request Form to make Designee relationship changes. This form will need to be completed and signed by the Designee, then returned to the Program Administrator via email, providing written approval of the request. New Designees will not be granted access to the portal until September 1, 2022 but we would like to be informed of a new AVD that will be added to the program.

*Will the portal still be open for new AV applications during the pause? If not, is there an email process we can use to submit AV application(s) for processing?*

- New AV applications will not be available in the portal this summer. Companies that are seeking to become AVs this summer can reach out to the Program Administrator at [admin@illinoisabp.com](mailto:admin@illinoisabp.com), but portal access will not be able to be granted until September 1st. To be clear, AVs can request to become AVs from 7/1/22–9/1/22, but will not be approved by the Program to operate nor able to use portal functionalities until on or soon after 9/1.

*Will designee/AV relationships be transferred over to the new portal, or will they need to be re-designated to an AV?*

- AV and Designee linkages that are intact on 6/30 will continue through the summer and be intact on 9/1 new portal launch.

#### **5. Deadline management**

*Projects with deadlines before Part II re-opens:*

- Any projects that have energization deadlines during the pause period are still able to request

extensions on that energization deadline. The process for extension requests on the AV side will remain the same this summer and should be emailed to [IPA.Solar@illinois.gov](mailto:IPA.Solar@illinois.gov).

## **6. Backlog Applications and Application Processing**

*Will backlogged Part I and II applications be reviewed during program closure?*

- Yes, backlogged applications (both Part I and Part II) will be reviewed during the Program platform pause starting in mid-July. The Program Administrator will send additional information on this process and prioritization of applications in a future communication.

*Will reports be available to track the statuses of applications?*

- Yes, we can communicate application status. Please reach out to the Program Administrator at [admin@illinoisabp.com](mailto:admin@illinoisabp.com) via email to request this information.

*Timeline to submit Part I and Part II applications:*

- Please see key dates here: <https://illinoisabp.com/transition-updates/>

*Will Part I applications that are in progress be carried over from the legacy system?*

- Yes, all project data including data for in process applications will be carried over from the old portal to the new portal.

*Will Part II applications that are submitted prior to the portal closing, that are Part II approved before November, be able to be invoiced?*

- Yes

*When is the soonest date that AVs can submit Part I applications (for projects selected from the waitlist) for submission to ICC?*

- The first submission date to the ICC will be September 15, 2022. Any applications that are Part I verified throughout the application pause will be sent to the ICC for approval during this meeting.

*We have other questions re: the interim process and the new API - can we send them somewhere to get answered and shared?*

- Yes. Please direct any questions to [admin@illinoisabp.com](mailto:admin@illinoisabp.com)

## **7. Community Solar Subscription Management**

*How will the functionality of managing Community Solar subscribers work during the transition period, i.e. the CS subscriber Dashboard, such as Add Subscribers, Edit Subscribers, Terminate Subscribers?*

- While the new and enhanced ABP portal is being developed, changes to Community Solar subscriptions can be tracked over SharePoint. The Program Administrator will create an Excel document listing all subscribers as of 6/30, as well as any unassigned disclosure forms. AVs and AVDs can then update or create new subscribers. We welcome feedback on this process, and this area will be discussed further at the 7/6 webinar.

*With the legacy portal being read-only, how will customer allocation changes (removals, additions, size changes) be executed during the portal pause?*

- This will be discussed at the 7/6 webinar. Customer allocation changes can be also requested via email to the Program Administrator at [admin@illinoisabp.com](mailto:admin@illinoisabp.com).

*We have many important quarterly deadlines for Community Solar projects on 9/1. Will there be time to ensure the customer lists match in the ABP portal and utility portal ahead of this deadline?*

- Yes, and the Program Administrator will provide details on this process in the coming weeks.

## **8. Marketing and Consumer Protection**

*Are there any informational resources available for customers?*

- All of the customer informational materials that are present on the Program sites will continue to be available, including informational brochures, the Going Solar guide, and all resources provided on the consumer facing Illinois Shines websites ([www.illinoisshines.com](http://www.illinoisshines.com)). Updated websites as well as new and refreshed materials, with expanded coverage of Consumer Protections, will become available on the Program websites in the coming months.

*Will Energy Solutions provide feedback on participating CS project's marketing materials?*

- The Program Administrator will not be providing feedback on marketing materials until early fall.

*All of these work arounds are highly manual. This will likely lead to mistakes/human error (Disclosure Forms signed late, etc.). Will the Consumer Protections department take any accountability for this if it results in increased customer issues?*

- The Agency and its partner, the Program Administrator, expect all Program participants to be in compliance with all Program requirements, even when using manual workaround options being provided from 7/1/2022–9/1/2022. As always, all data should be reviewed to ensure accuracy prior to submission to the Program. The Program requirement that the disclosure form must be signed prior to the execution of any installation, lease, PPA, or CS subscription agreement remains in effect during this time.

## **9. Miscellaneous**

*We will have to forward you all the emails we have with SRECTrade on each client to get them through the process of approval?*

- Please reach out to the Program Administrator for more information on project- or AV-specific questions.

*Where can the recording of this webinar be accessed later?*

- [We have posted a recording of this webinar on the Illinois ABP YouTube channel here.](#) We will also email a link in the weekly communication.