**Questions & Answers
from the July 6,2022**

Approved Vendors
Informational Webinar

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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 7/6/22 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. The webinar was the second in a series of two initial informational webinars.

Key Program Dates

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

July 6, 2022 Webinar Q&A

1. Annual Report

I received the Annual Report email but not the Energy Solutions SharePoint email. Who do I contact to request that?

- Support can be accessed by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820. You can also access the 2022 Annual Report guide here: https://illinoisabp.com/wp-content/uploads/2022/07/2022–AV-Annual-Report-Guide.pdf

The guide linked to the Annual Report email was a corrupted file. How can I receive support?

- Support can be accessed by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820. You can also access the 2022 Annual Report guide here: https://illinoisabp.com/wp-content/uploads/2022/07/2022–AV-Annual-Report-Guide.pdf

2. Applications

Do you know when there will be access to see the updated block capacity?

- We are not accepting applications at this time, so capacity will not change until after 9/1 once applications start coming in again. We hope to provide updates during the Summer for application processing and how that impacts capacity.

I am curious as to where the block will stand once the Part I's are processed

- We hope to have updates throughout the summer, but don't have an exact date at this time.

3. Approved Vendor Management

Should I be seeing forms that I previously sent?

- Disclosure Forms with status Submitted, Awaiting Signature, or Complete will carry over into the new Portal, and you will be able to see these in your workbench shortly. Disclosure Forms that were in progress and not generated will not be carried over.

As a designee, I am not seeing any of my vendors in my work bench. Would I need to email you in order to get my added to my workbench?

- Yes, please reach out to us and we can correct this for you. Support can be provided by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820.

How do I change the Vendor and Installer information? Ours is not correct.

- Please email the Program Administrator at admin@illionoisabp.com with the information you would like changed.

Will the same group of Program Administrators continue reviewing our applications?

- The Program Administrator has transitioned to a new company, and therefore, the team of application processors will be different from July 1, 2022 onward.

4. CSV Access for Community Solar and Distributed Generation Projects
Will we still have the CSV upload option rather than filling out each section?

- There is a temporary SharePoint-based CSV option currently available for CS projects, which requires CS AVs and AVDs to populate Disclosure Form PDFs, populate CSV templates, and place all files back on SharePoint for upload. The Portal-based CSV upload options that will generate PDFs within the Portal for both DG and CS will be available for testing in August.

Can Designees be removed at this time?

- Yes. Please email the Program Administrator at admin@illinoisabp.com, including your username, for assistance.

Do current Designees need to submit the request form?

- No, current designees do not need to submit the Designee Request Form. This is only for new designees, or new designee roles for existing designees.

5. Deadline Management
We have a lot of projects coming up on their annual check next quarter. With the Portal not being at full functionality, in terms of subscriber management what will be the process to submit the next quarterly reports?

- Please see our webinar recording for a SharePoint-based workaround that was presented subscriber management. For further assistance, please email the Program Administrator at admin@illinoisabp.com or by the Program phone line, at 877–783–1820.

6. Disclosure Forms
What is the best email to address issues with Disclosure Forms for Community Solar?

- Support can be provided by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820.

What is the best phone number to get support creating new Disclosure Forms for Community Solar, and accessing old Disclosure Forms?

- Support can be provided by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820.

Will Energy Solutions provide temporary relief to the industry by allowing Disclosure Forms to be executed via DocuSign (outside of a Portal) while we work through this transition? Residential sales in the State have been halted for nearly a week now during one of the busiest sales months of the year. We need an interim solution immediately that allows us to compliantly sell and execute disclosures in compliance with Section 5(a) of the Program Guidebook.

- For the duration of the time that Disclosure Forms remain unavailable to Approved Vendors and their Designees, the Agency will grant leniency for the Program requirement that the Disclosure Form must be executed prior to the customer contract/agreement for sales that occurred during this time. This will be temporary and limited to days when Disclosure Forms were not available. Details on this will be provided in the Program's weekly announcement on 7/8.

Is the Community Solar Disclosure Form contact email/phone number you just shared the same for Residential Solar? Thanks!

- Yes. Support for all project types can be accessed by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820.

Will there be forgiveness for accounts with signed contracts within the last week with no disclosures?

- For the duration of the time that Disclosure Forms remain unavailable to Approved Vendors and their Designees, the Agency will grant leniency for the Program requirement that the Disclosure Form must be executed prior to the customer contract/agreement for sales that occurred during this time. This will be temporary and limited to days when Disclosure Forms were not available. Details on this will be provided in the Program's weekly announcement.

What should Designees do for Disclosure Forms that are currently out of compliance (signed after the sale contract) as a result of the technical issues and the inability to log into the new Portal to create Disclosure Forms?

- Support can be provided by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820. Please review Disclosure Form timing requirement that was released today.

In the legacy platform, we had the option of creating a Form ID without selecting a vendor and could later assign that Form ID to a specific vendor's site, at which point that Form ID would be "locked in" to that vendor. This was an important feature for organizations that may have been acquiring for and/or managing more than one AV. Will this still be a feature we can utilize?

- Thank you for raising this functionality request. Our team will review and discuss this.

Will you eventually allow Disclosure Forms to be non-vendor specific if we do not know what vendor they will belong to initially?

- Thank you for raising this functionality request. Our team will review and discuss this.

Can you update the Vendor on Disclosure Forms that were migrated from the prior Portal? Or is the function only available for newly generated Disclosure Forms?

- This is only available for new forms generated in the new Program Portal, not for forms created in the legacy Portal. Migrated Disclosure Forms from the legacy Portal were forms that had a of status "Submitted" or beyond.

In the past, we did not have to select the system name or assignment at the time of Disclosure Form execution. Is that not the case anymore?

- Temporarily during transition, CS Disclosure Forms can only be created as a project "TBD" form. Please email us at admin@illinoisabp.com if we can further assist.

How can "vendor not specified" Disclosure Forms be generated?

- Our team will review this request and determine its feasibility.

Multiple designees have indicated an inability to submit Disclosure Forms through the Portal. Is this isolated, or can the Program Administrator confirm they are aware of this issue, and provide an estimate for resolution?

- Thank you. We are aware of this issue and are working on releasing a solution. We apologize for the inconvenience.

Can we make edits to submitted forms if we need to as long as it has not been sent to the customer?

- At this time, this ability does not exist, as submitted forms are locked.

Previously we were able to edit the Disclosure Form by inputting the Disclosure Form number prior to the customer signature and upload of the Disclosure Form in the Portal. Will that be an option at some point, if it is not already?

- This functionality is planned for future availability. We will be looking at ability to copy the details of a generated form to a new form, and revisions to existing forms depending on whether they were 'sent' to customers or not.

To clarify, Disclosure Forms cannot be sent for E-signature at this time?

- Correct. Sending Disclosure Forms via e-signature is not currently available, but this feature should be available shortly.

I'm still unclear as to the SharePoint process A to Z for Distributed Generation Disclosure Forms.

- There is currently no SharePoint process for Distributed Generation Disclosure Forms; this process is only available for Community Solar.

A webinar slide said "if you have utilized a third-party e-signature platform to obtain the customers signature, please attach a copy of the signature/ summary tracking page to the signed Consume Disclosure Form". Does this mean a Disclosure can be signed via a third-party e-signature platform and uploaded into the Portal?

- Per the Program Guidebook, Approved Vendors and Designees may employ commercially available third-party e-signature systems for customer signature of the Disclosure Form but must submit the audit/signature information page with the e-signed Disclosure Form.

We have to have clear timelines on when a customer will be able to sign community solar Disclosure Forms. At this time the marketing guidelines require that the Disclosure Form is presented to the customer, before signup with the Approved Vendor. We had to suspend all sales since 7/1/2022 and were told that Disclosure Form functionality would be available in the new Portal.

- We apologize for this difficulty. IPA and the Program Administrator are evaluating this issue and will provide an announcement and update this week. Our Information Systems team is addressing this issue. If you have additional questions or continue to need support, please contact us at admin@illinoisabp.com or via the Program phone line, at 877–783–1820.

What is the current ETA on a complete rollout of DG Disclosure Form generation and signing? It sounded like almost the entire process is unavailable at this point. The transition timeline emails indicated Disclosure Forms would be uninterrupted.

- We are targeting that the full Disclosure Form generation and signing to be released next week. We will provide an update if there are any changes to that timeline.

I believe you mentioned the Disclosure Form will be available to create later this month but hasn't been rolled out yet – was that correct? Is there a certain date you are tracking for the rollout of Disclosure Form?

- Downloading PDFs for wet signature or sending Disclosure Forms via e-signature is not currently available, but this feature should be available shortly.

Can Vendor Designees get access to this CS Disclosure Form workaround folder? Or only AVs?
- AVs can request that a Designee be provided access to the CS Disclosure Form folder. AVs should email the Program Administrator at admin@illinoisabp.com to request access for a Designee.

How many blank Disclosure Forms will be available in the SharePoint folder?

- More than 25,000 Disclosure Forms are available in total. The Program Administrator can confirm the exact amount per Approved Vendor if requested, but we can generate as many as needed.

if you upload the csv file, where do the Disclosure Forms appear?

- The PDFs will need to be populated by the AV and uploaded to SharePoint; the CSV template will not populate the Disclosure Forms. The CSV template will be used to add the Disclosure Forms back to the platform in August.

Is there a CSV upload for Distributed Generation Disclosure Forms, or do they need to be filled out manually for now? Also, to clarify, Distributed Generation Disclosure Forms will be completed in the new Portal, while CS Disclosure Forms will be done via SharePoint?

- There is not currently a CSV option for Distributed Generation Disclosure Forms; they will need to be manually created in the Portal. Community Solar Disclosure Forms can be created either on SharePoint or in the new Portal.

Would a wet signature work?

- Wet signature is a valid method for Disclosure Forms to be signed.

Would we be able to receive a blank template form for the CSV upload or would that only be if we requested the SharePoint folder? Is it the same template that was previously shared?

- The CSV template for this temporary Community Solar Disclosure Form process is very similar to the previous template but will not allow for a Disclosure Form to be associated to a project, so those columns have been removed. We also added the Disclosure Form ID. It would only be used if you request the SharePoint option.

A previous slide stated next to the document upload function, "if you have utilized a third-party e-signature platform to obtain the customers signature, please attach a copy of the signature/ summary tracking page to the signed Consumer Disclosure Form". Does this mean a disclosure can be signed via a third-party e-signature platform and uploaded into the Portal?

- Per the Program Guidebook, Approved Vendors and Designees may employ commercially available third-party e-signature systems for customer signature of the Disclosure Form but must submit the audit/signature information page with the e-signed Disclosure Form.

Can you confirm that Disclosure Forms can't be updated?

- That is correct. A submitted Disclosure Form is no longer editable.

Are the IPA Disclosure Forms the same format and content as prior?

- Yes. The Disclosure Forms are the same format as prior to the transition of Program Administrators.

Is there a way to include the subscribers name on the Disclosure Form viewing page?

- Yes, this functionality will be available in the Portal shortly.

Using the DG PDF tools that you showcased (once we resolve our password issues), it seems we can create a PDF but not send it for signature. What is the workaround process right now, to create a PDF and have the customer sign the form? We have been told not to have customers sign contracts with us until the PDF is signed. Are we to stop selling until the PDF tool is fully launched?

- If you have any Disclosure Forms signed out of order, please let us know. IPA and the Program Administrator are evaluating this issue and have provided more detail in the July 8 announcement.

For the Disclosure Form that's meant to be released this week, does that refer to both Distributed Generation and Community Solar?

- Yes. Both Disclosure Forms will be released by July 14, 2022, when the Portal re-opens.

Since we have to get Disclosure Forms signed prior to having a contract signed, should we be telling all clients that we cannot send them anything to sign until this issue is resolved?

- If you have any Disclosure Forms signed out of order, please let us know. IPA and the Program Administrator are evaluating this issue and have provided more detail in the July 8 announcement.

Will Disclosure Forms still be required to be signed before the customer agreement while this transition is still being worked through and the final version of the Portal isn't ready? Especially without the API?

- If you have any Disclosure Forms signed out of order, please let us know. IPA and the Program Administrator are evaluating this issue and have provided more detail in the July 8 announcement.

Please confirm, for Community Solar Disclosure Forms, that when we download a blank one from the SharePoint folder, it's expected that we use a PDF editor or third-party E-sign party (commercially available) to enter the information required of the DF? We are double-checking because this more or less wasn't allowed previously.

- Any commercially available signature platforms are allowed, but we must receive that signature confirmation page via the PDF that gets re-uploaded to SharePoint.

Is it still a requirement that the disclosure signature timestamp is prior to the timestamp of for when a subscriber signs an agreement for a site?

- If you have any Disclosure Forms signed out of order, please let us know. IPA and the Program Administrator are evaluating this issue and have provided more detail in the July 8 announcement.

To the point about not being able to change vendors right now, there are some DFs that would have come over as "vendor not specified" so will we be able to utilize those, or would we have to get them re-signed?

- Our team will review this request and determine its feasibility.

When will the CSV feature for DG Disclosure Forms be available?

- This feature will be available in August 2022.

The loss of .csv uploads for non-Community Solar is a big deal. When will that be made available again?

- There is a temporary SharePoint-based CSV option currently available for CS projects, which requires CS AVs and AVDs to populate Disclosure Form PDFs, populate CSV templates, and place all files back on SharePoint for upload. The Portal-based CSV upload options that will generate PDFs within the Portal for both DG and CS will be available for testing in August.

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Can we use the interim SharePoint Community Solar Disclosure Form download and upload process with CSV, beyond the interim timeframe? We would like to make technical changes once.

- This temporary SharePoint process will only be available during the transition period, from July 5th - August, when the Portal-based CSV template is available.

Can we expect to be able to generate DG Disclosure Forms a week from now?

- AVs and AVDs will be able to generate DG Disclosure Forms when the Platform reopens by July 14, 2022. Downloading PDFs for wet signature or sending Disclosure Forms via e-signature is not currently available, but this feature should be available shortly.

With regarding residential Distributed Generation, if we use a third-party e-signature platform, how do we generate an Application ID and Total SREC Value?

- With a third-party signature platform, AVs will need to make sure they provide the Form ID that we've provided on the PDF. Returning with the Form ID and date stamp, you can use the Total SREC Value that should come in the confirmation you get back with your e-sign, in some form of an acknowledgement page on your e-sign.

If we use a third-party e-sig platform, how do we generate an application ID and Total SREC Value?

- All signature platforms MUST be in compliance with the Program Guidebook. This is not a change in requirements. Esign platforms must be commercially available - not just singularly used by your company. If you are confused on this requirement, please reach out.

Is there is a backup option for installer invoices if we are unable to logon before July 10th?

- There is not a backup option for invoice generation after 7/10/22. If you are having issues with invoicing specifically, please contact InClime at 877-917-5703. Please note this contact should only be used for July 2022 invoicing.

We've noticed that RECs generated/reported for May are not recorded on the SharePoint files, should we be marking this section as correct or should we be marking these as incorrect and reporting this production?

- This has been resolved and SharePoint files have been updated. If you need further support, contact the Program Administrator at admin@illinoisabp.com or the Program phone line, 877-783-1820.

Before you mass send out email to customers - that can confuse our customers , can the approved vendor know which Form IDs are in Awaiting Signature?

- Thank you for raising this consideration, which our team will discuss. Approved Vendors will need to access the Portal and trigger a re-send Disclosure Forms that had not yet been signed, in order to avoid customer confusion.

Is there a compliant work around for now?

- Please provide more information about the requested need and workaround. Thank you. You can email the Program Administrator at admin@illinoisabp.com or by the Program phone line, at 877-783-1820.

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Does ABP have a work around option for the interim in order to prevent a disruption to deal flow?

- Please refer to the July 8, 2022 announcement for more details.

7. Portal Access

We are still having issues logging onto the AV Portal and have heard that many of our designees are having the same issue. What is the best process for submitting these requests?

- We apologize for this difficulty. Our Information Systems team is addressing this issue. As users may have noticed, access to the ABP Portal was temporarily suspended the evening of July 7, 2022. The Program Administration team anticipates resolving the issue and restoring access to the ABP Portal by July 14, 2022, and will provide an update if that target changes. If you have additional questions or continue to need support, please contact us at admin@illinoisabp.com or via the Program phone line, at 877–783–1820.

This process tells me "an error has occured, please contact your system administrator". I was told it would take 5 days for a call back from Illinois ABP..

- We apologize for this difficulty. Our Information Systems team is addressing this issue. As users may have noticed, access to the ABP Portal was temporarily suspended the evening of July 7, 2022. The Program Administration team anticipates resolving the issue and restoring access to the ABP Portal by July 14, 2022, and will provide an update if that target changes. If you have additional questions or continue to need support, please contact us at admin@illinoisabp.com or via the Program phone line, at 877–783–1820.

How long will the Legacy Portal remain accessable? Is there any time limit after which the legacy portol will be removed from the new Portal?

- The legacy Portal will be maintained for several years, but access will be granted on an as-needed basis and by approval of IPA. Applicable data from the legacy Portal has been brought into the new Portal, managed by the new Program Administrator, Energy Solutions. Please contact us by email at admin@illinoisabp.com or by the Program phone line, 877–783–1820, if we can further assist or answer questions.

Is there a test or demo version of the Portal available?

- There is not a test version of the Portal available at this time.

Is this workbench live?

- The Program Administrator has temporarily suspended access to the Portal; AVs and AVDs will be able to access the ABP Portal and workbench by 9am CT on July 14, 2022.

Could you please confirm the best contact for login issues. IPA.ContactUs@illinois.gov?

- Please email the Program Administrator at admin@illinoisabp.com, including your username, for assistance.

Also not seeing how we upload using the .csv template. Has that been addressed?

- The CSV template will be uploaded by the PA in August. AVs will need to populate the PDFs and the CSV template, and then upload the completed files back to SharePoint.

We have heard from a number of our designees that they are still having issues logging onto the ABP Portal. It would be very helpful if the ABP sent out logon instructions, including the new default PW that was included in this email. Also, do you have an ETA on when logon issues will be fixed? We have many partners who need to send out Disclosure Forms. I know you are working on it around the clock, but it would be helpful if we had a rough time estimate to communicate to customers and installers.

- If you have any Disclosure Forms signed out of order, please let us know. IPA and the Program Administrator are evaluating this issue, and have provided more detail in the July 8 announcement. The Program Administration team anticipates restoring access to the ABP Portal by July 14, 2022, and will provide an update if that target changes.

Will the ABP Portal logon instructions be sent out to designees and sub-designees as well? I know a number of our installer partners have been having issues logging in and I do not know if all of them are able to attend this webinar?

- This webinar will be recorded and the slides are posted in the 7/8/22 announcement, and last week's (6/28/22) webinar recording has been posted. Please refer Desginees to these resources and instructions they contain. For further support, please contact the Program Administrator at admin@illinoisabp.com.

8. Subscriber Management
Is August 31st still the deadline for Q2 subscriber verification deadline?

- August 31, 2022 is the next deadline for all subscribers to be updated, and for all necessary updated Disclosure Forms to be submitted. The Program Administrator will begin the next quarterly review process on September 1, 2022.

Can you provide information about testing out the new Portal and could be start any dummy application to test the new Portal functions?

- Test applications are not available at this time; however, we have heard from many Approved Vendors that testing would be appreciated, and we have noted this as a priority. More information on the September 1 rollout of the fully-functioning new Portal will be forthcoming.

9. Miscellaneous
Could you please share the exact link where we might find the recording and slides from the last webinar? And, the timeline and link for this webinar recording?

- Program Transition updates can be found at https://illinoisabp.com/transition-updates/. All Approved Vendors and Approved Vendor Designees should sign up for email updates, via the Program website (www.illinoisabp.com), as this sign up is used to share all updates and resources at this time. Links to both the webinar recording (https://www.youtube.com/watch?v=xFPMu4xdnNA) and the presentation slides (https://illinoisabp.com/wp-content/uploads/2022/07/IL-ABP-AV-Info-Webinar-06-28-2022-For-Presentation.pdf) were shared in last week's announcement.

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We received the SharePoint email but it had no hyperlink, What is the best way we can request a the link?

- We apologize for the inconvenience. Support can be provided by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820.

Generally, is there a phone number or email address specifically for Approved Vendors to contact the Energy Solutions administration team?

- Support can be accessed by contacting the Program Administrator at admin@illinoisabp.com or the Program phone line, 877–783–1820.

What is the Program website where I can find the answers to the last Q&A?

- The official Program website is www.illinoisabp.com. For a link to the July 1 announcement that includes links to the 6/28/22 webinar recording and Questions and Answers, and other Transition-related announcements, please visit https://illinoisabp.com/transition-updates/.

Where can we find the recording for this webinar?

- A link to a recording of this webinar will be shared at the Program website, and provided in this week's weekly Announcement to AVs. The recording will be made available at YouTube.com

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