

Update to Disclosure Form Requirements and Annual Report Next Steps

July 21, 2022

Program News

- **Update to Limited Exceptions on Disclosure Form Timing Requirement During Portal Downtime**
In consideration of temporary Portal unavailability due to technical issues and transition-related adjustments for AVs, the Program is allowing a **limited exception** from the requirement that customers review and sign Disclosure Forms prior to executing their installation or subscription contract. This exception will **only apply** for contracts that were signed by the customer on June 30 through **August 5, 2022**. The IPA has chosen to extend this exception due to reported issues and/or confusion around logging into the portal. All impacted customers must still subsequently receive and sign a Disclosure Form. **On August 6, 2022, the requirement that customers review and sign Disclosure Forms before the contract is signed will apply again in full.**

If your company has new customers who signed a contract between June 30 through August 5 and who did not sign a Disclosure Form prior to contract execution, **you must follow the below steps to qualify for this exception:**

1. By **August 19, 2022**, provide to the Program Administrator **EITHER** 1) a list of the affected customers (customer name and contract execution date) **OR** 2) copies of the executed contracts, which must include the customer name and execution date. These documents should be shared via an Approved Vendor's secure SharePoint and organized by Designee (if Designees were being used to conduct sales).
 2. Provide completed Disclosure Forms for the affected customers within 3 weeks of the customer's contract execution date.
 3. Submit the signed Disclosure Forms for the affected customers to the Portal within 6 weeks of the customer's contract execution date.
- **Community-Driven Community Solar Applications Update**
Applications received for Community-Driven Community Solar are in review, including identification of deficiencies in applications. As applicable, a two-week period will be extended to applicants to remedy curable deficiencies with their applications. Scoring for CDCS projects will be released and announced in August.
 - **Portal, SharePoint and Email Processes**
We thank AVs and Designees for their acclimation and use of the Portal, SharePoint or email processes in support of various key activities. Stakeholders are successfully utilizing this array of tools to support:
 - Disclosure Form generation, wet- or e-signature, and upload (via the Portal);
 - Submission of Annual or Bi-Annual Reports, CSV process for Community Solar Disclosure Forms and Community Solar Subscriber Management (via SharePoint); and
 - Designee Requests, Extension Requests, Need Info Responses, and General Questions (via Email)

We thank AVs and Designees for continuing to share questions, challenges, and feedback that will help optimize our support, software development, and more. For a refresh on the processes shared in the July 6, 2022 AV Informational Webinar please [view a recording](#), [presentation slides](#), and a summary of webinar [Questions and Answers](#).

Transition Updates

Approved Vendors and their Designees are continuing to submit excellent questions about key activities, utilization of the new Portal or key workarounds, and other requests. We thank our stakeholders for your continued patience

during this transition, and for your contributions to the success of the Adjustable Block Program.

- **Portal Updates and Workaround Processes**

As of July 14, 2022, registered AVs and Designees can log in to the ABP portal to generate new Disclosure Forms, and customers can now utilize both wet signature or e-signature features for Disclosure Form execution. If you have either issues getting into the portal or successfully generating a Disclosure Form, please reach out to admin@illinoisabp.com with a detailed account of your issue to it can be resolved.

- **Login and Password Resets** - All portal users, regardless of whether they were registered prior to July, will need to complete a password reset in conjunction with the Portal's restoration on July 14, 2022.

1. At the Sign In area, click *Forgot Password*.
2. At the *Forgot Password* screen, enter your email address that is registered with the program.
3. Click the unique URL contained in the password reset email sent to you.
4. Use the *Password Reset* tool to establish a new password.
 - a. Passwords must contain a minimum of 12 characters, and include at least one uppercase letter, one lowercase letter, one number, and one special character (e.g., @ \$ # !)
5. Once your password is accepted, you'll be signed into the system and brought to your landing page.

REMINDER: During the Program Administrator transition, the IPA has placed a temporary pause on all new ABP project application submissions between July 1, 2022 through September 1, 2022. All transition updates can be found on the [ABP Transition Hub webpage](#).

CONTACT US: For Portal, application, or Program-specific questions and inquiries, please contact admin@illinoisabp.com or call 877-783-1820.

Requirements and Reminders

- **Review of Approved Vendor Annual Report Submissions and Curing of Deficiencies**

*Annual Reports were due on **July 15, 2022**. Energy Solutions is reviewing Annual Report responses, and will follow up with questions or to request missing information from AVs within 60 days of July 15, 2022 (by September 13, 2022). Approved Vendors must promptly respond to and address requests for clarification or additional information. All Approved Vendors must have complete Annual Reports, including curing any missing or requested information, within 90 days of the Annual Report due date, by October 13, 2022. **If you have not yet submitted your Annual Report by the July 15, 2022 deadline, please do so immediately, this is a time sensitive issue and non-submittal is not permitted.***

- **Disclosure Forms and E-Signatures**

The ability to create PDF Disclosure Forms for Distributed Generation and Community Solar is active. At this time, all Disclosure Forms will require the designation of an Approved Vendor, and for Community Solar, all Disclosure Forms are treated as "Project TBD" until the importing of all legacy project data into the new portal is completed. Available Disclosure Form actions and capabilities now include the ability to:

- *Start a Disclosure Form with the ability to 'resume' entry if not completed*
- *Download a Disclosure Form into a PDF, and select signature type as "wet-signature"*
- *Select a Disclosure Form to be sent for e-signature*
- *Download and view a PDF that was completed in the legacy Portal*
- *Upload a Disclosure Form that has been signed*

- **AV Renewals During Application Pause**

As previously shared, AV renewals are paused from July 1, 2022 – September 1, 2022. Any Approved Vendor that is due for renewal during this period will be considered in compliance with Program requirements and will be instructed to submit a renewal after the Program portal relaunches on September 1, 2022. New Approved Vendor applications will be accepted again beginning on September 1, 2022.