Illinois Shines/Adjustable Block Program

Portal Help Guides: Batching

Last updated: October 28, 2022

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Topics

- **Manage** your batch list
- **Create, edit, and submit** a batch
- **Pay** your batch fees

Please note:
The Batches functionality is only available to **Vendors** (AVs).

Getting started: Logging in

Step 1: In your browser, navigate to https://portal.illinoisabp.com/

Step 2: Enter your registered username and password.

- Usernames are *case-sensitive*.
- If you don't remember your password, select the "*Forgot Password*" link and follow the prompts.
- Contact Support for further help at admin@illinoisabp.com

Step 3: Select "*Sign In*" to be taken to your Dashboard.

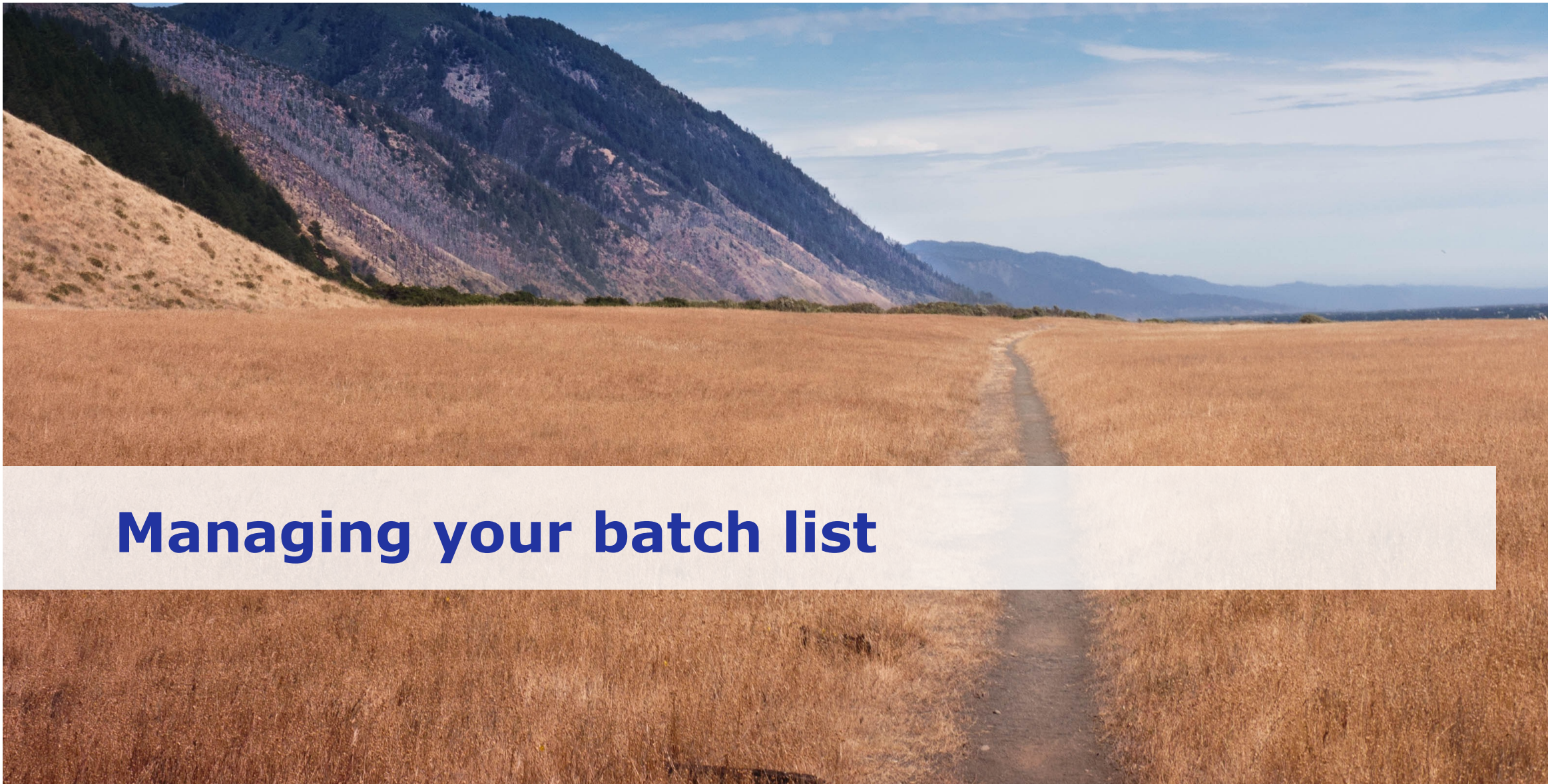# Getting started: Batches menu
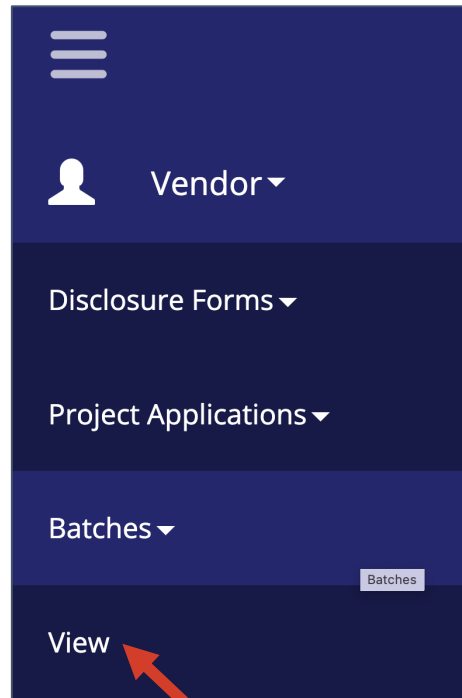
Step 4: In the **left** menu, expand the Vendor role and then the "*Batches*" functionality. Then select the "***View***" task.

Step 5: *(If prompted)* Select a Vendor from the list in the pop-up window. When it's highlighted, select the "*Proceed*" button.

Vendor	
👤 Vendor ▾	
Disclosure Forms ▾	
Project Applications ▾	
Batches ▾	Batches
View	

Select Vendor ✕

Proceed		⏮ ⏪ Page 1 ⏩

Vendor ID	Company name
10	Company 1
14	Company 2

Note: Some AVs may be taken directly to the View task without seeing the pop-up.

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Managing your batch list

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Managing your batch list: Overview

Search bars: filter by column criteria

Create a **new** batch

Show/hide columns

Create Batch

Vendor ID	Batch ID	Batch Type	REC Contract Type	Status	Exported to Stripe UTC	Actions
	=					👁
1134	20018	DG	20 Year Contract	Created		✎
4	20017	CS	15 Year Contract	Pending Payment	10/28/2022	⊘
4	470	CS	20 Year Contract	Approved		⊘

Edit batch

List of previously created batches

View batch

1 to 4 of 4

Visible vs. total number of batches; page control

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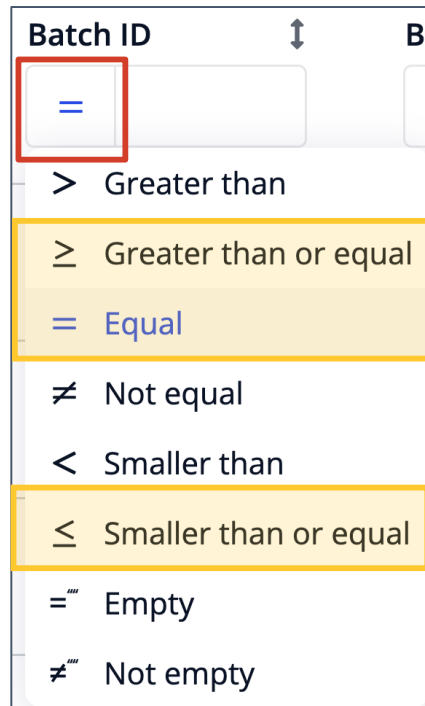
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Viewing your batch list

Use the search bars at the **top** of each column to filter your list of batches.

- The portal will search <u>all</u> of your batches.
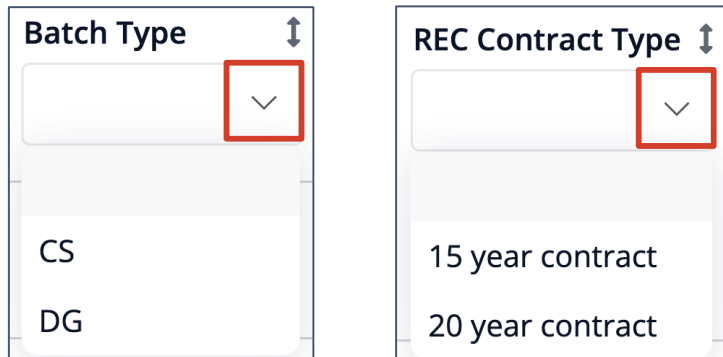- You can search/filter multiple columns simultaneously.

- Batch IDs are numbers.
- Select the **left** button to try other match criteria.

Useful options:

=	You know the **exact** batch ID you need
≥	Find more recent batches (**higher** numbers)
≤	Find older batches (**lower** numbers)

Batch ID

=
> Greater than
≥ Greater than or equal
= Equal
≠ Not equal
< Smaller than
≤ Smaller than or equal
=‴ Empty
≠‴ Not empty

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Viewing your batch list

Batch Type ↕

CS

DG

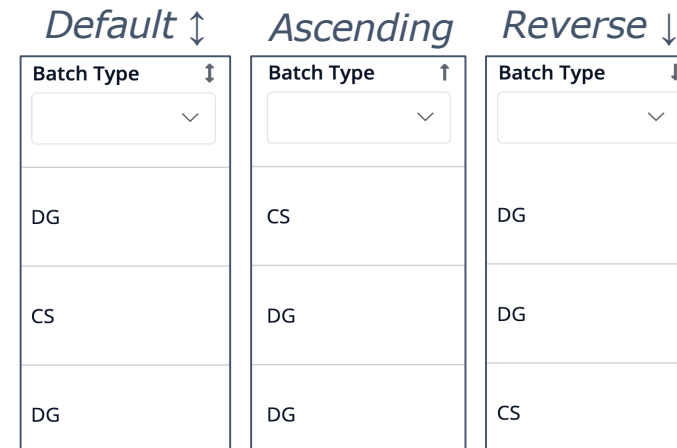**REC Contract Type** ↕

15 year contract

20 year contract

Dropdowns: Select the down arrows to see your options.
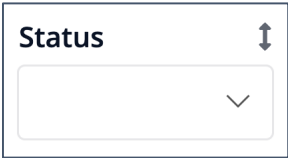
CS – Community Solar
DG – Distributed Generation

Sorting the table
By default, batches are listed in order of creation. Select an arrow to the **right** of any column to sort by that column in default, ascending, or reverse order.
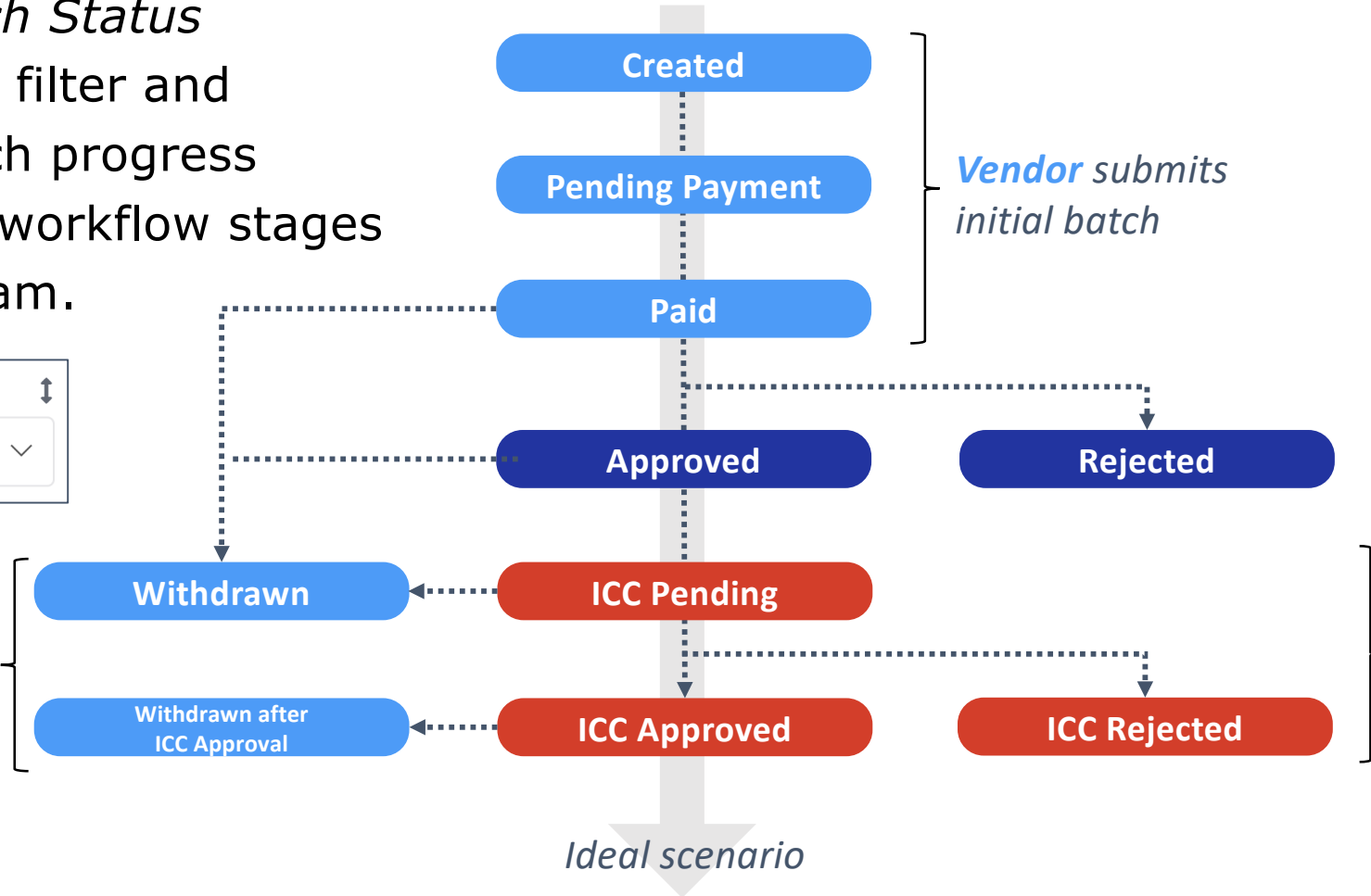
Default ↕

Batch Type ↕
DG
CS
DG

Ascending

Batch Type ↑
CS
DG
DG

Reverse ↓

Batch Type ↓
DG
DG
CS

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Viewing your batch list

Use the *Batch Status* dropdown to filter and monitor batch progress through the workflow stages of this diagram.

Status

| Created |
| Pending Payment |
| Paid |

Vendor submits initial batch

| Approved | Rejected |

PA works with Vendor to qualify and/or rebatch

Vendor withdraws all applications in batch

| Withdrawn | ICC Pending |
| Withdrawn after ICC Approval | ICC Approved | ICC Rejected |

ICC reviews batches every 2 weeks

Ideal scenario

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Creating and editing batches

Creating a new batch

Step 1: From the Batches > **View** task, select the "*Create Batch*" button at the **top right** of the dashboard.

Step 2: In the pop-up window:

a. Use the radio buttons to choose the project type to be batched (Distributed Generation or Community Solar) and the REC contract length.

b. Select a Vendor number from the dropdown.

c. Select the "*Create Batch*" button. You'll be sent to a page for your new batch.

Create Batch

Create Batch ✕

Batch Type   ◯ DG   ◯ CS

REC Contract Type   ◯ 15 Year Contract   ◯ 20 Year Contract

* 20-year contract includes Public Schools and Traditional Community Solar

Vendor   ▽

Create Batch

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Resuming a batch

(Skip to the next page if you've just created a new batch)

Step 1: From the Batches > **View** task, find the batch you want to work on (use the search bars if it helps.) Select the "*Edit*" button under the Actions column.

Batch ID ↕	Batch Type ↕	REC Contract Type ↕	Status ↕	Exported to Stripe UTC ↕	Actions ↕
=	⌄	⌄	Created ⌄		
20018	DG	20 Year Contract	**Created**		✎

If you see this "*View only*" button, the batch can't be edited. This may be because the batch is locked after being submitted, or because the batching function is not yet available.
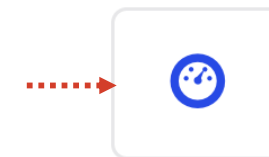
Editing a batch: overview

Select intended payment method from dropdown

Fee/total size calculators *Updated in real time*

Save and exit

Finalize batch

Exit w/o saving

Batch 20017

Status **Created**
Batch Type: CS
REC Contract Type: 15 Year Contract

Payment type (required)

✓
ACH
Check
CreditCard
WireTransfer

Batch Fee

$5000.00
Batch Fee

2000 kW
Total Size

1
Project Count

Save & Calculate   Submit   Back

Search bars

Show/hide columns

Vendor ID	Project Type	Disclosure ID	Project Application ID	Project Name	Part 1 Status	
=	⌄	=	=	Ab	⌄	👁
9	CS		93248	Batch3	Submitted	✖ Remove
	CS		93247	Batch2	Submitted	➕ Add
	CS		93246	Batch1	Submitted	➕ Add

Eligible projects
- Matching type
- Submitted status
- Not already in batch

Add/remove projects from batch

Visible vs. total number of eligible projects; page control

⏮ ⏪ 1 to 3 of 3 ⏩ ⏭

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Editing a batch: step by step

Step 1: Go to the Batch edit page by creating a new batch or resuming a "Created" batch. The table below the search bars lists all projects that are eligible for the batch.

What if I don't see the project I want?

Confirm that the project:

- Is under the Vendor you selected
- Has a Part I App in the **Submitted** state
- Has **not** been added to a different batch
- Matches the current batch type (DG or CS)
- Matches the current REC contract type
    - 20 year: Public Schools or Traditional Community Solar
    - 15 year: All others

Editing a batch: step by step

Step 2: For each row, select the "**+***Add*" button to include that project in the batch and the "✕*Remove*" button to take the project back out. The **Batch Fee** and the **Total Size** will recalculate after each change.

How do I know if a project has been included?
The easiest way is to associate the button with a status:
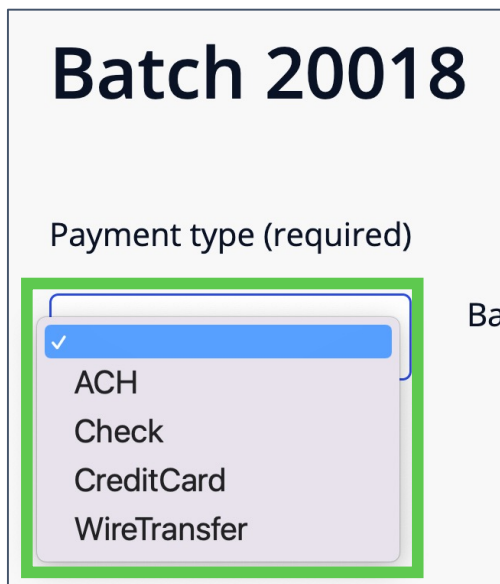
9	CS	93251	test12	Submitted	✕ Remove

= *Included*

9	CS	93251	test12	Submitted	+ Add

= *Excluded*

You'll also see the Batch Fee and Total Size calculators update as you add and remove projects.

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Editing a batch: step by step

Step 3: Select your intended payment method for this batch from the dropdown at the **left** side of the workbench, below the Batch ID.

Batch 20018

Payment type (required)

✓
ACH
Check
CreditCard
WireTransfer

Ba

You'll be able to pay the batch fee *after* you finalize and submit the batch.

Jump to "Paying your batch fees"

Please note that credit card payments (only) are subject to a 2.9% credit card processing fee, which will increase your final total.

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Editing a batch: step by step

Step 4: When you're done with adding projects, select the "*Submit*" button **above** the table, and then "*Proceed*" in the Confirmation window. This saves your batch.
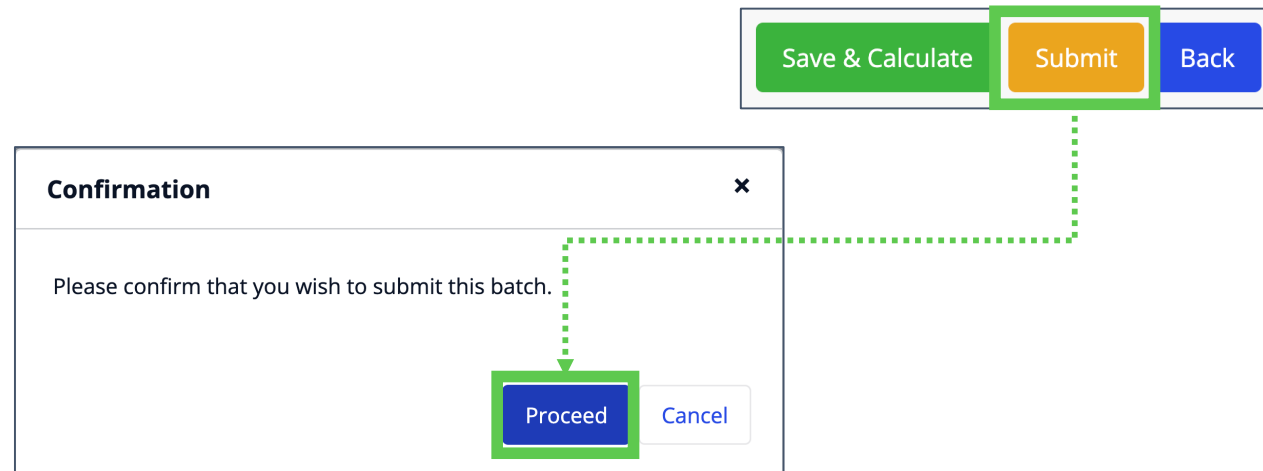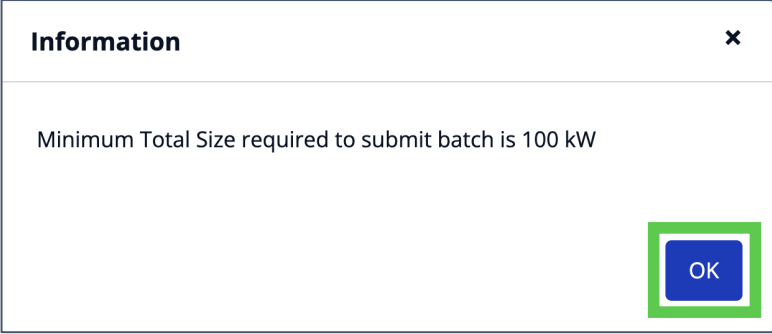
If you're not ready to move ahead, select the "*Save & Calculate*" button to save your changes for later, and/or select the "*Back*" button to go back to the Batch View dashboard.

Editing a batch: step by step

If your batch has a problem (such as an ineligible size), you'll see an explanation when you attempt to Submit. Select "*OK*", make additional changes, and resubmit.

Information ✕

Minimum Total Size required to submit batch is 100 kW

OK

Step 5: If you selected "*Credit Card*" as your Payment Type in Step 3, the portal will inform you of the 2.9% credit card processing fee and the resulting final batch fee amount. Select "*Confirm*" to proceed with the credit card payment. Select "Cancel" to choose a different payment method.

Confirm Credit Card ✕

Batch payment method
Using a credit card will result in a 2.9% processing fee.

This changes your total batch fee, please confirm you wish to pay via credit card.
New Batch Fee Amount

5145.00

Confirm   Cancel

Editing a batch: step by step

Step 6: If you selected "*Credit Card*" and then "Confirm", or if you selected any other payment method, you'll receive a payment confirmation message informing you of next steps.

Select "*OK*" to return to your Batches dashboard. Your Batch will now have "Pending Payment" Status and be view-only.

Information   ✕

Batch submitted successfully!

You will receive an email from our payment processor Stripe within 1 business day with batch payment instructions.

The batch status will update to "Paid" once your payment is confirmed.

Please contact admin@illinoisabp.com if you have any questions.

[OK]

| 20026 | CS | A | **Pending Payment** | ⊘ |

Paying your batch fees

Paying your batch fees: workflow

Status ↕

Pending Payment ⌄

Invoice from Illinois Power Agency

$80.00

Due October 31, 2022

[PDF] Invoice-221997C-00...
47.9 KB ⌄

Pay this invoice

Status ↕

Paid ⌄

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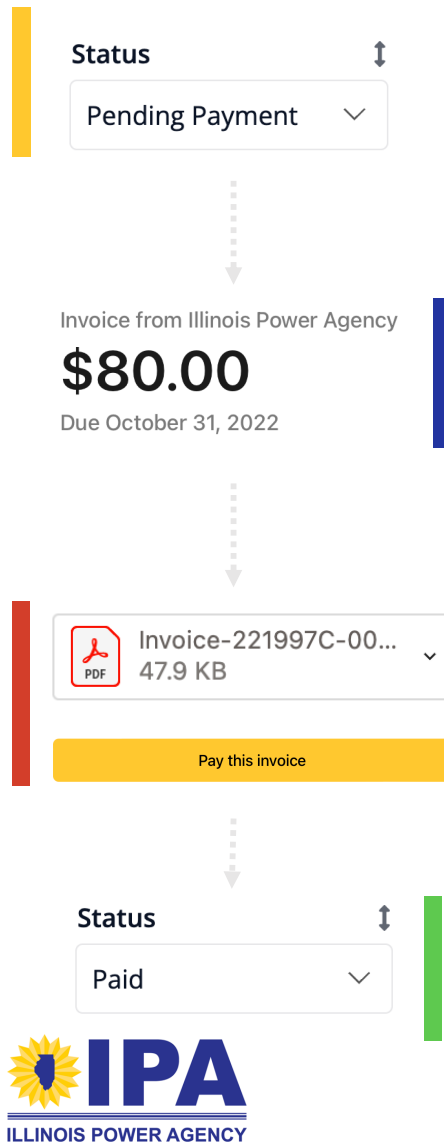
After you've **submitted a batch**, the batch status will change to "Pending Payment".

Within 1 business day, you should **receive an email** via Stripe, our payment processor, with the subject "New invoice from Illinois Power Agency". *Be sure to check your Spam folder if you don't see this email.*

Open the attached invoice for details and **check payment** instructions; or select "*Pay this invoice*" to **pay online**. *Fees must be paid within 10 days (15 day grace period).*

The batch status will update to "Paid" once we confirm your payment (generally within **2 business days** of receipt).

Paying your batch fees: payment options
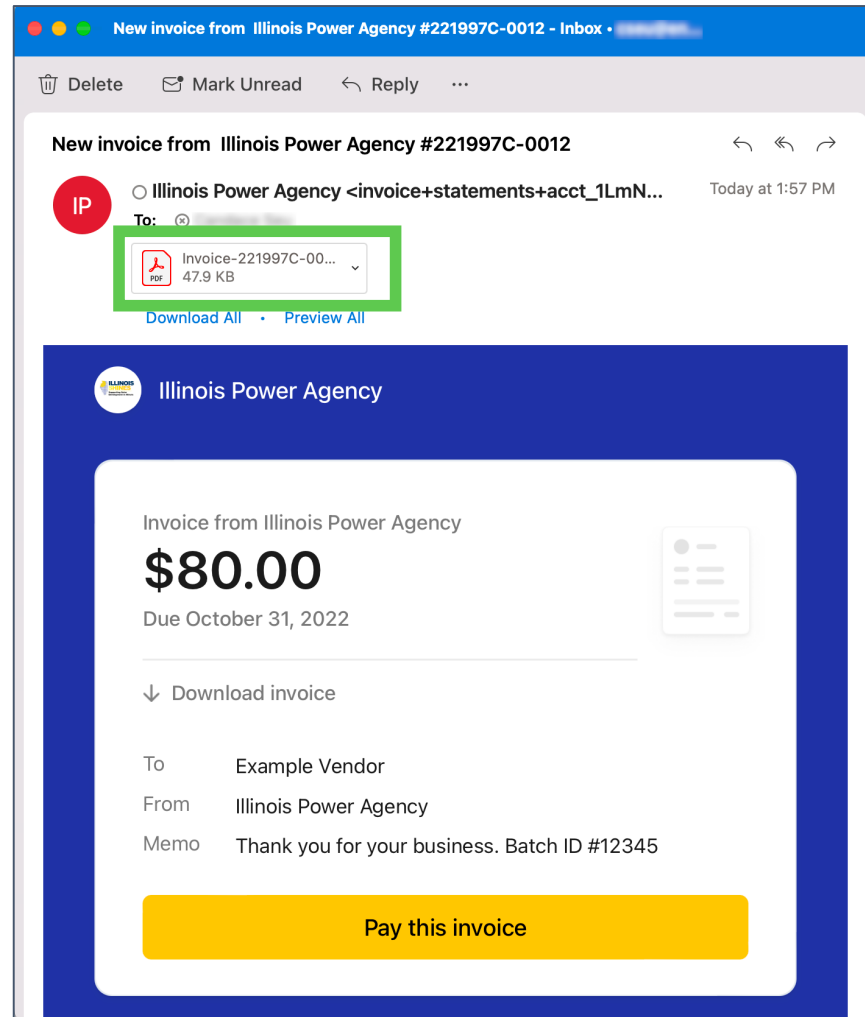
To pay by check

Step 1: Find and open the batch fee Invoice email from Stripe.

> The **From:** field will name the Illinois Power Agency, but the email address will end in @stripe.com
>
> The body of the email will show a Memo field with your Batch ID.

Step 2: Double-click the Invoice attachment (PDF) to open it.

> *Your computer may look different from this example, depending on your operating system and email program.*

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Paying by check (cont.)

Step 3: Write a check for the batch fee amount shown in the invoice.

$80.00 due October 31, 2022			
Pay online			
Thank you for your business. Batch ID #12345			
Description	Qty	Unit price (excl. tax)	Amount (excl. tax)
Batch Fee	1	$80.00	$80.00
		Subtotal	$80.00
		Total	$80.00
		Amount due	**$80.00**

The check must be payable to **Illinois Shines-Cohen Ventures**.

Include the batch ID # in the check memo field.

Step 4: Mail the check to: Illinois Shines
c/o Energy Solutions (IL ABP Program Administrator)
Attn: Grace Reyes
449 15th St, Suite 400
Oakland, CA 94612

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Paying your batch fees: payment options
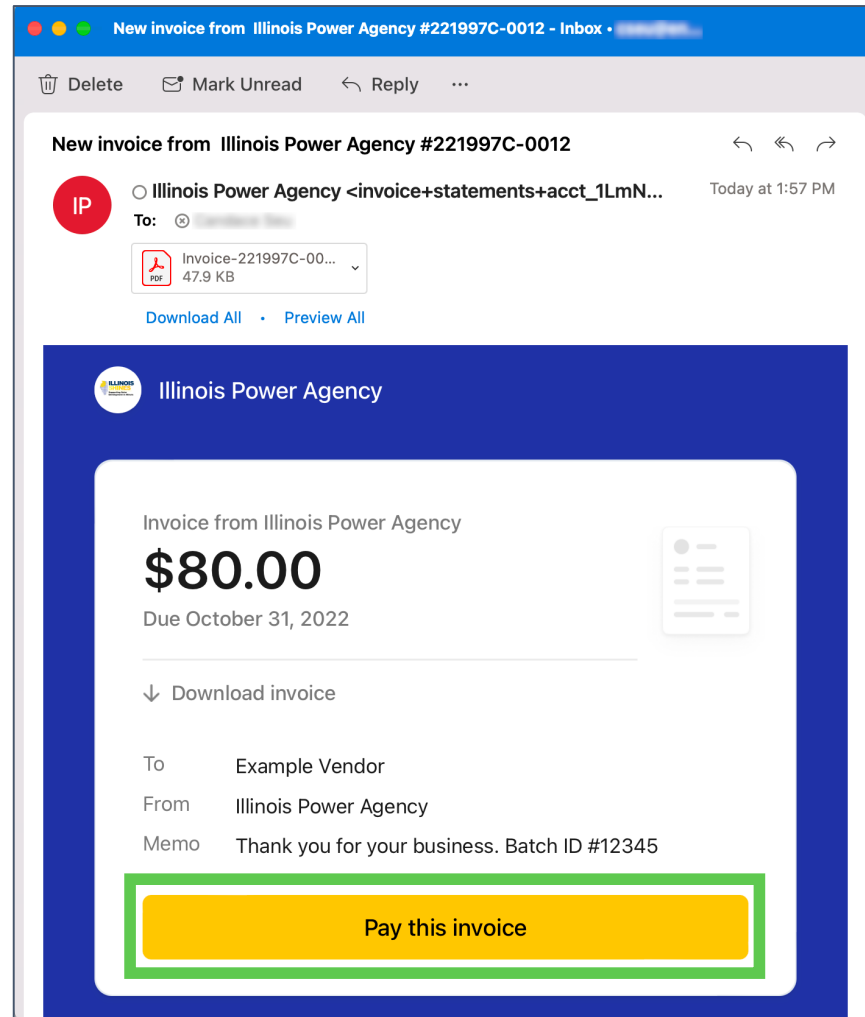
To pay by credit card, bank transfer (ACH), or wire transfer

Step 1: Find and open the batch fee Invoice email from Stripe.

> The **From:** field will name the Illinois Power Agency, but the email address will end in @stripe.com
>
> The body of the email will show a Memo field with your Batch ID.

Step 2: Select the "*Pay this invoice*" button to go to the Stripe website**.**

> *Your computer may look different from this example, depending on your operating system and email program.*

Paying online via Stripe

Step 3: Confirm that you're at an https://invoice.stripe.com/ URL with the IPA logo at the top. The webpage will show the same batch fee and batch ID# that you saw in the email.

You can select the arrow on the document icon on the right to download a copy of the PDF invoice (the same document that was attached to your email).

Paying online via Stripe

Step 4: Scroll down and select your preferred electronic payment option:

- For **card**, enter your credit card information as prompted and select the "*Pay*" button to authorize.

Paying online via Stripe

- For manual **bank transfer** (ACH), you'll need to log in to your bank's website or call your bank to authorize a bank-to-bank (ACH) transaction.

  Use the bank information provided on your payment page *(don't use the example information shown here)*.

Paying online via Stripe

- For **ACH direct debit**, select the "*US bank account*" option.

- If you haven't previously linked a bank account to Stripe, you may need to go through the bank verification process as shown.

Paying online via Stripe

- For **ACH direct debit**, if you've already linked one or more bank account to Stripe, make sure that the bank account you'd like to pay from is shown in the "Bank account" section, and select "*Pay*".

Paying online via Stripe

Step 5: If you were able to pay with an automatic payment option (**card** or **ACH direct debit**), you'll see a payment confirmation page. Select the "*Download receipt*" button to get a PDF receipt confirming the payment date and method for your records.

Post-payment next steps

If you opted to pay via check or manual bank transfer, please allow additional time for mailing and processing. The Program Administrator will confirm your payment once it arrives and update your Project Status to Paid.

As vendors submit, the capacity in each block will be allocated. The program administrator will regularly update the capacity status of each block on the IL ABP website.

To view the capacity status, visit:
https://illinoisabp.com/block-capacity-dashboard/
"*Detailed Program Data*"

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Questions?

Contact Program Administration Support:

admin@illinoisabp.com

877.783.1820