



Illinois Shines/Adjustable Block Program Portal Help Guides: Managing Disclosure Forms

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What's a Disclosure Form?

A **Disclosure Form (DF)** is a document that includes all the information that a customer needs to know about a proposed solar project. A DF protects customers and approved vendors by making sure that the terms of the project are clear.

A completed (customer-signed) DF is **required** to start a Distributed Generation Part I Application. A completed DF is **not** required to start a Community Solar Part I Application.

Vendors and their designees can manage their DFs in the IL ABP portal using the steps in this guide.



Topics

- **View** a list of your Disclosure Forms
- **Resume** an incomplete DF
- **View or download** a DF
- **Send** a DF for signature
- **Upload** a signed DF

Getting started: Logging in

Sign in

Username

yourusername

Password

.....

Sign in [Forgot Password](#)

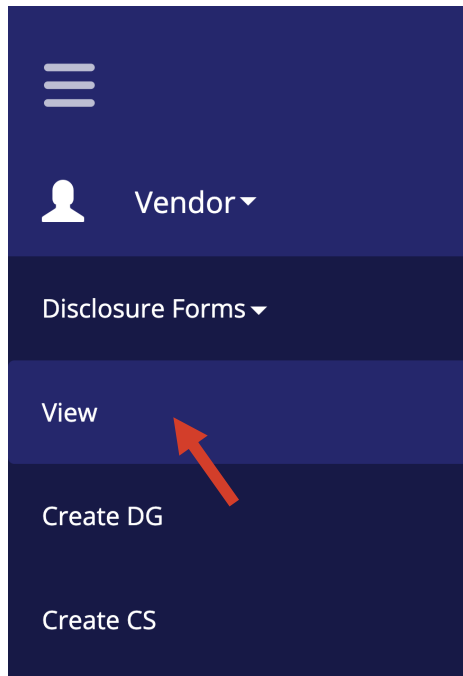
Step 1: In your browser, navigate to <https://portal.illinoisabp.com/>

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: View task



Step 4: In the left menu, select (click or hover over) your role to expand its sub-menu. Select the “*Disclosure Forms*” functionality and then select the “**View**” task.

Step 5: (Designees only) Select a vendor from the list in the pop-up window. When it’s highlighted, select the “*Proceed*” button.





Viewing a list of your Disclosure Forms


Viewing your DF list: Overview

Disclosure Forms

Shortcuts to other tasks

Create new Distributed Generation Disclosure Form Create new Community Solar Disclosure Form Upload via CSV template

Form ID System Name Form Type Submitted by Status Date Started Date Submitted Action Download View

Search 

251822	DG-Example-1	Purchase Form	username	In Progress			Resume Form		
251821	DG-Example-2	Lease Form	username	Awaiting Signature			Obtain Signature Upload Signed Form PDF	Form PDF	View Form
251816	CS-Example-1	CSF Form	username	Submitted			Obtain Signature Upload	Form PDF	View Form

2022, Powered by : Energy Solutions, LLC

Search bar: type to narrow down by Form ID or System Name

List of previously created DFs

Viewing your DF list: Overview

What DFs are included in the table?

- DFs created in the legacy portal and in the current portal
- DFs for Distributed Generation (DG) and Community Solar (CS) projects

Shortcutting to other tasks

Click any of the white buttons above the table to jump directly to other DF tasks.

Create new Distributed Generation Disclosure Form

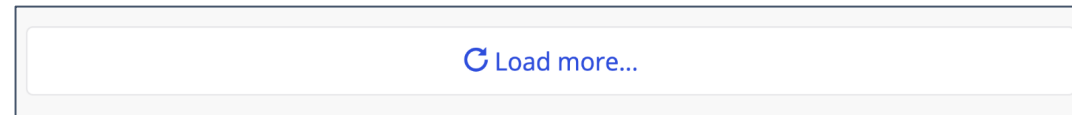
Create new Community Solar Disclosure Form

Upload via CSV template

Viewing your DF list

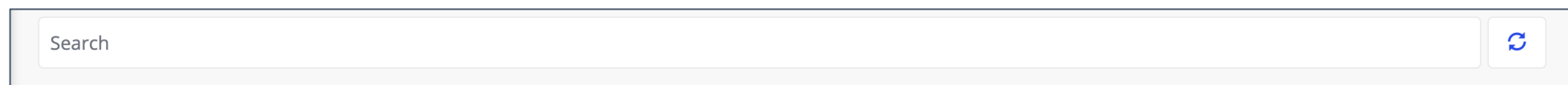
Loading more forms

If you have a large number of DFs, the portal will only show the latest 10 forms to start. Click the “*Load More*” button at the **bottom** of the table to load the next 10 forms.



Filtering your DFs with the search bar

Use the **search bar** at the **top** of the table to filter a long list of DFs. You can enter a full or partial Form ID or System Name.



Note: The portal will search all of your DFs, including ones that aren't visibly loaded.

DF list: what do the table columns mean?

Column Name	Meaning
<i>Form ID</i>	A uniquely identifying number, automatically assigned to your DF by the portal
<i>System Name</i>	The uniquely identifying name you selected for your system at the start of DF generation
<i>Form Type</i>	The type of project that your DF covers: <i>Distributed Generation</i> <ul style="list-style-type: none">• [System] "Lease Form"• "Over 25 [kW] Form"• Power Purchase Agreement "PPA Form"• [System] "Purchase Form" <i>Community Solar</i> " CSF Form "
<i>Submitted by</i>	Shows the username of the person who submitted the DF. (Will be blank if the DF has not been submitted)
<i>Status</i>	Indicates the current status of the DF: <ul style="list-style-type: none">• "In Progress" – DF needs more input before it can be generated• "Submitted" – DF was generated, but has not been sent to the customer• "Awaiting Signature" – DF was sent to customer for signature by PDF or HelloSign• "Complete" – Signed DF was uploaded to the portal as PDF or received via HelloSign

DF list: what do the table columns mean?

Column Name	Meaning
<i>Date Started</i>	Shows the date the DF was started (<i>may be blank</i>)
<i>Date Submitted</i>	Shows the date the DF was submitted (<i>may be blank</i>)
<i>Action</i>	Select an appropriate next action, based on the DF's status: <ul style="list-style-type: none">• "Resume Form" – Continue filling out an "In Progress" form• "Obtain Signature" – Send a "Submitted" DF to the customer for e-signature or download a PDF copy for physical signature. (Will still be shown even if the DF was signed)• "Upload Signed Form PDF" – Browse your computer for a PDF of a physically signed DF
<i>Download</i>	Download a copy of: <ul style="list-style-type: none">• "Form PDF" – the original, unsigned DF• "Signed Form PDF" – the e-signed or uploaded signed DF
<i>View</i>	View the contents of the DF as a webpage in your browser



Resuming an incomplete Disclosure Form

Resuming an incomplete Disclosure Form

For step-by-step instructions on how to **generate** a DF, refer to the guide for your desired form type.

- You can request these guides from Support (admin@illinoisabp.com).

As you select the “*Save and Continue*” buttons in each section of the DF, the portal saves your work-in-progress. You can navigate away from and later return to a saved incomplete DF by following these steps:

Step 1: Navigate to the Disclosure Forms > **View** task. If prompted, select the Vendor ID / Company Name associated with the incomplete DF and then select the “*View Disclosure Forms*” button.

Resuming an incomplete Disclosure Form

Step 2: The table of existing DFs and drafts will appear. Find your incomplete DF in the list and confirm that its Status is "In Progress." In the Action column, choose the "Resume Form" link.

Form ID	System Name	Form Type	Submitted by	Status	Date Started	Date Submitted	Action	Download	View
Search <input type="text"/>									
251886	Example1	Lease Form	username	In Progress			Resume Form		

Tip: Type your full or partial Form ID or System Name in the Search bar to filter a long list of DFs.

Step 3: The portal will bring you to the last section you saved. You can now continue generating your DF.



Viewing a submitted Disclosure Form

Viewing a submitted Disclosure Form in your browser

Step 1: Navigate to the Disclosure Forms > **View** task. If prompted, select the Vendor ID / Company Name associated with the DF and then select the “*View Disclosure Forms*” button.

Step 2: The table of existing DF and drafts will appear. Find your DF in the list. In the *View* column, select the “*View Form*” link.

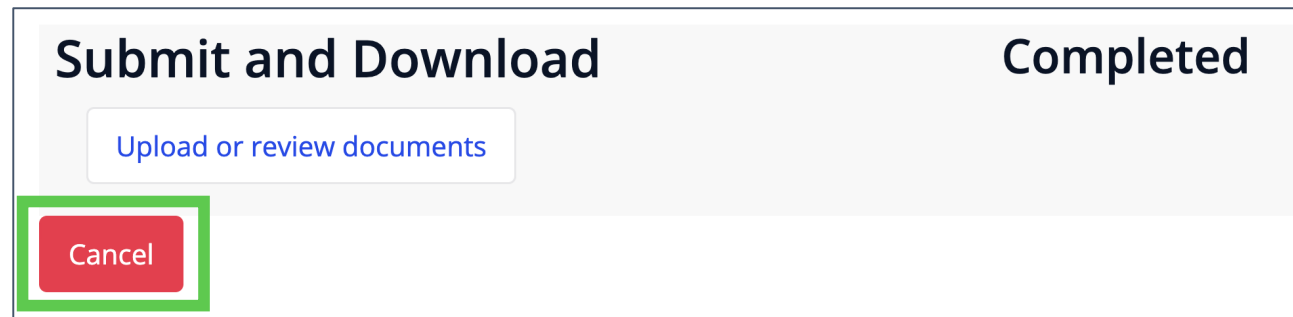
Status	Date Started	Date Submitted	Action	Download	View
Submitted			Obtain Signature Upload Signed Form PDF	Form PDF	View Form

Tip: If you don't see a “*View Form*” link, the DF may still be incomplete (status: “*In Progress*”).

Viewing a submitted DF in your browser

Step 3: The portal will take you to a webpage containing your DF inputs. The webpage is read-only and all sections are marked as "Completed".

To exit this view, use your browser's "BACK" button or select the "Cancel" button at the **bottom** of the webpage.





Sending a submitted Disclosure Form for customer e-sign

Step 1: Navigate to the Disclosure Forms > **View** task. If prompted, select the Vendor ID / Company Name associated with the DF and then select the “*View Disclosure Forms*” button.

Step 2: The table of existing DFs and drafts will appear. Find your DF in the list and confirm that its Status is “Submitted” or “Awaiting Signature.” In the Action column, select the “*Obtain Signature*” link.

Status	Date Started	Date Submitted	Action	Download	View
Submitted			Obtain Signature	Form PDF	View Form
			Upload Signed Form PDF		

Sending a submitted DF for customer e-sign

Edit Disclosure Form x

Please choose E-signature or Download PDF (for wet-signature) option below-
Please verify following required information if requesting E-Signature-

Recipient Email *

Recipient Name *

Save

Send to Customer for E-Signature

Request E-Signature

Download file for physical signature

Download Disclosure Form PDF

Step 3: A pop-up window will appear. Enter the customer’s email address and name, then select “Save.”

Step 4: Finalize the request by selecting the “Request E-signature” button. Select the “Proceed” button in the Confirmation window.

Confirmation x

Are you sure?

Proceed Cancel

Sending a submitted DF for customer e-sign

Step 5: Your customer should now receive your DF! **Please wait at least 10 minutes** – the portal generates your DF automatically, but there may be a delay in the transfer to HelloSign.

If your customer has not received the DF email after 10 minutes:

1. Check their email address for errors and re-send to the correct address, if necessary
2. Ask the customer to check their spam/junk folder
3. If the problem remains, contact Program Administration Support for help.



Downloading a Disclosure Form

Downloading a DF for records/ink signature

Step 1: Navigate to the Disclosure Forms > **View** task. If prompted, select the Vendor ID / Company Name associated with the DF and then select the “*View Disclosure Forms*” button.

Step 2: The table of existing DFs and drafts will appear. Find your form in the list. In the Download column, select the “*Form PDF*” link. The PDF file will automatically download to your computer.

Status	Date Started	Date Submitted	Action	Download	View
Submitted			Obtain Signature Upload Signed Form PDF	Form PDF	View Form

The file name will include your Form ID and the YYYYMMDD date of submission, separated by an underscore (_).

Example:
ID123456_20221026_1.pdf

Downloading a DF for records/ink signature

Step 3: *Optional.* If you're not sure where the file downloaded to, try opening the "Downloads" section of your browser:

On Windows: Type CTRL + J

On Mac: Type Command + Option + L

Step 4: Look for the file near the top of the new "Downloads" browser window. Click on the filename to open it, or click on the Windows Explorer/Finder link to open the folder that contains the download.

You can now print or email the DF. Carefully review the DF with your customer, and make sure that they sign the final page. Once this is signed, you'll need to upload the signed DF to the portal.



Uploading a signed Disclosure Form

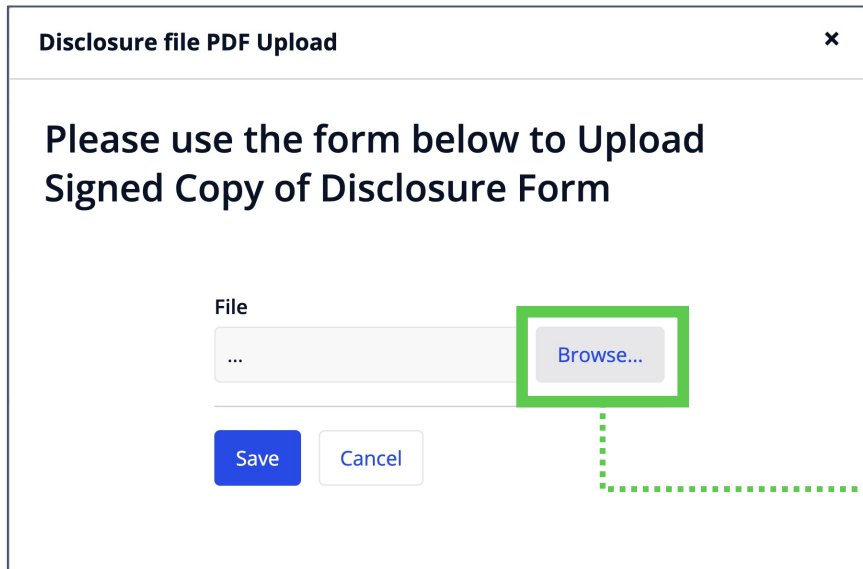
Uploading a signed Disclosure Form

Step 1: Navigate to the Disclosure Forms > **View** task. If prompted, select the Vendor ID / Company Name associated with the DF and then select the “*View Disclosure Forms*” button.

Step 2: The table of existing DFs and drafts will appear. Find your DF in the list and confirm that its Status is “*Submitted*” or “*Awaiting Signature.*” In the Action column, select the “*Upload Signed Form PDF*” link.

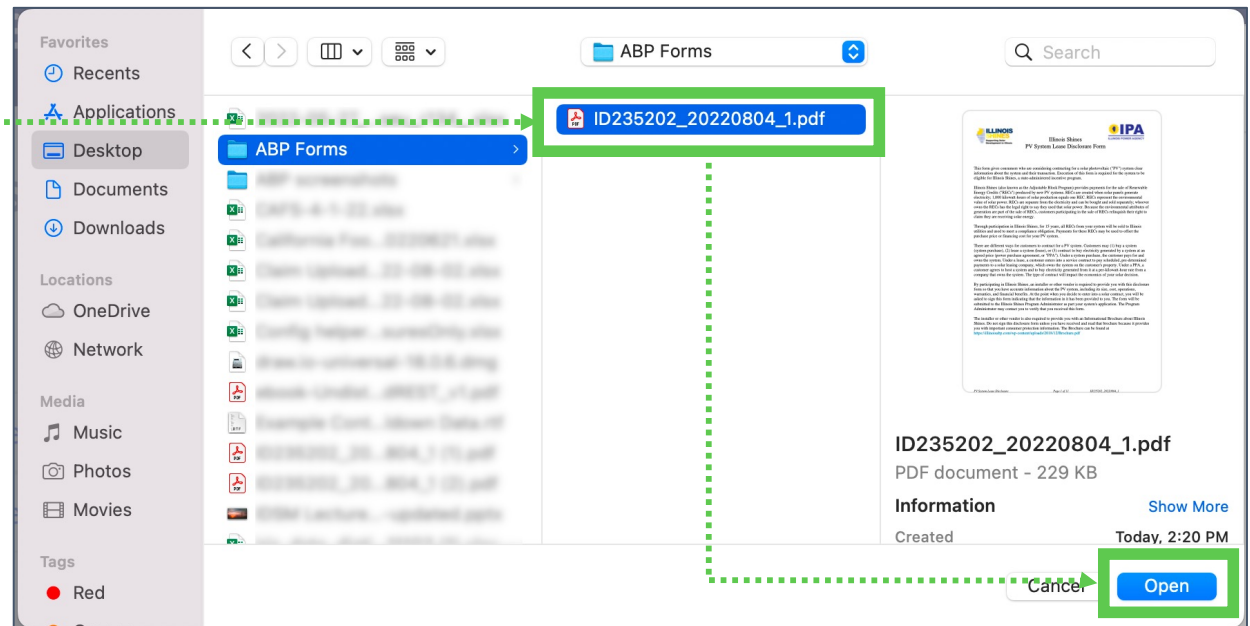
Status	Date Started	Date Submitted	Action	Download	View
Submitted			Obtain Signature	↓ Form PDF	View Form
			↑ Upload Signed Form PDF		

Uploading a signed Disclosure Form



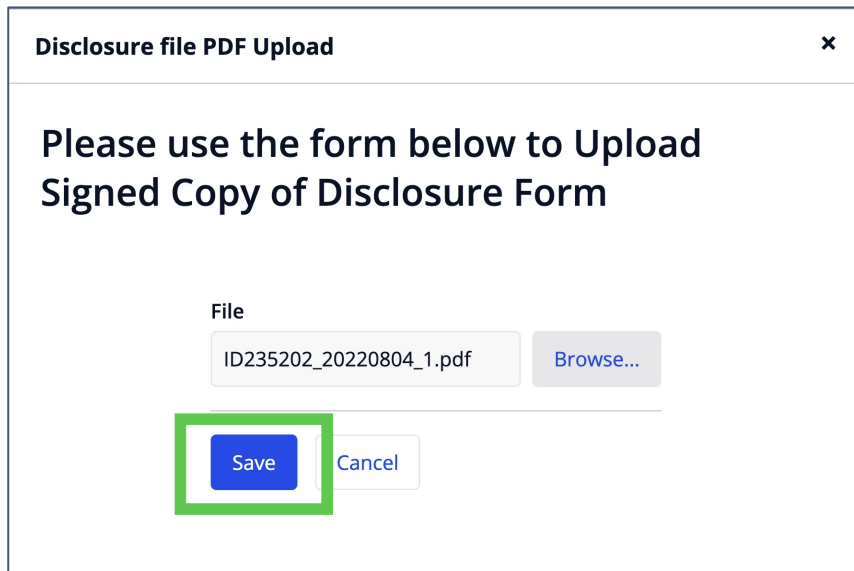
Step 3: A "Disclosure file PDF Upload" pop-up window will appear. Select the "Browse" button to find the signed DF on your local computer.

Example:



Uploading a signed Disclosure Form

Step 4: Once you've selected and opened your DF, select the "Save" button. You'll be brought back to your list of DFs, and the Status of your form will be set to "Completed."



Disclosure file PDF Upload

Please use the form below to Upload Signed Copy of Disclosure Form

File
ID235202_20220804_1.pdf Browse...

Save Cancel

Form ID	System Name	Form Type	Submitted by	Status
Search				
235202	test100	Lease Form		Completed

You can now start a Part I application based on this DF.

Questions?

Contact Program Administration Support:

admin@illinoisabp.com

877.783.1820

