



Illinois Shines/Adjustable Block Program Portal Help Guides: Batching

Last updated: November 2, 2022



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

Sign in

Username

yourusername

Password

.....

Sign in [Forgot Password](#)

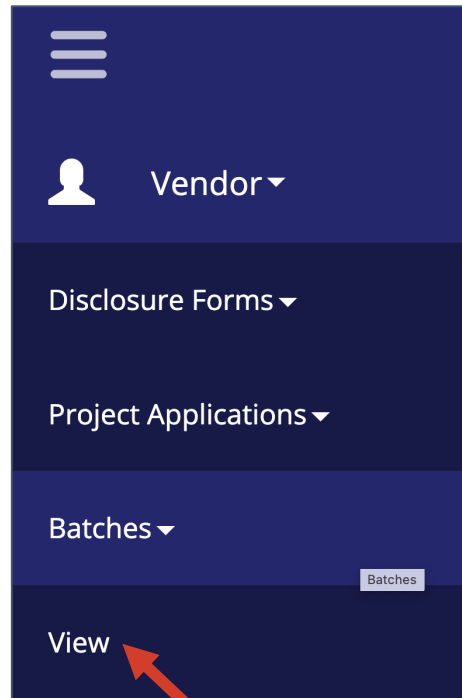
Step 1: In your browser, navigate to <https://portal.illinoisabp.com/>

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: 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.





Managing your batch list




Managing your batch list: Overview

Search bars: filter by column criteria

Show/hide columns

Create a **new** batch

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

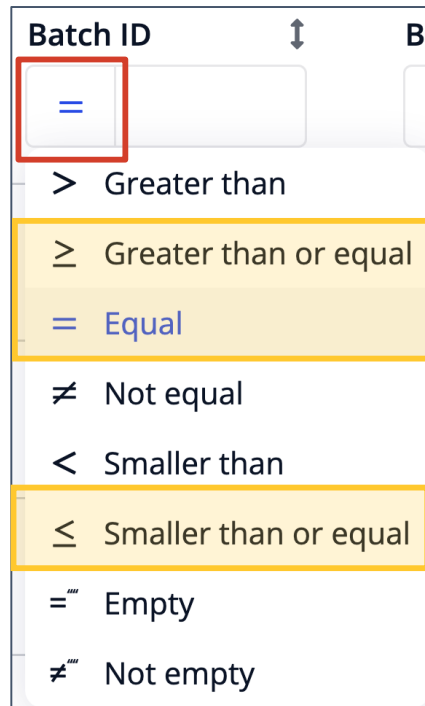
View batch

1 to 4 of 4

Viewing your batch list

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

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



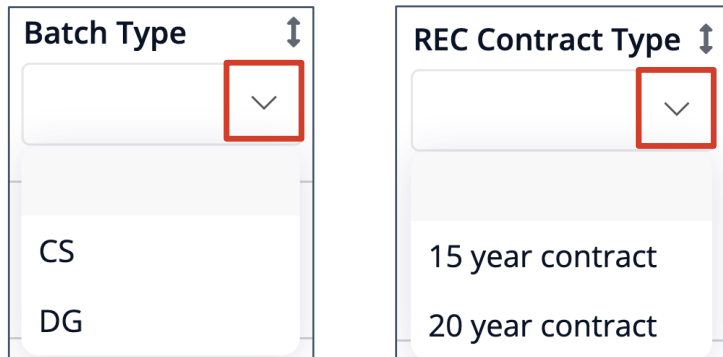
The image shows a dropdown menu for filtering 'Batch ID'. The menu is open, showing several options. The top option is '=' (Equal), which is highlighted with a red box. Below it are '>' (Greater than), '≥' (Greater than or equal), '= Equal' (highlighted with a yellow box), '≠' (Not equal), '<' (Smaller than), '≤' (Smaller than or equal, highlighted with a yellow box), '=""' (Empty), and '≠' (Not empty).

- 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)

Viewing your batch list

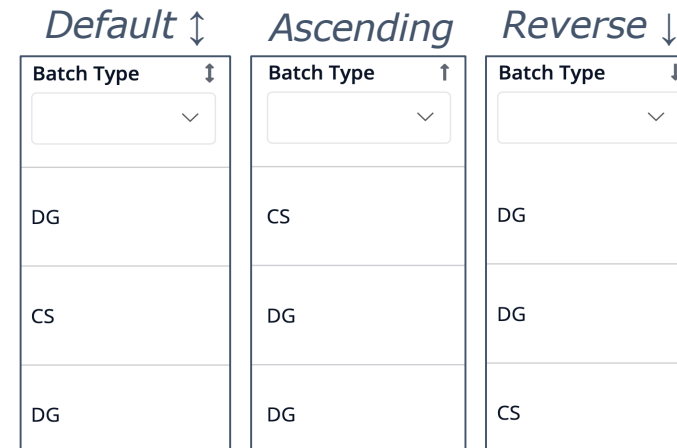


Dropdowns: Select the down arrows to see your options.

CS – Community Solar
DG – Distributed Generation

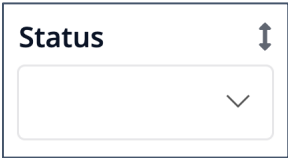
Sorting the table

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.

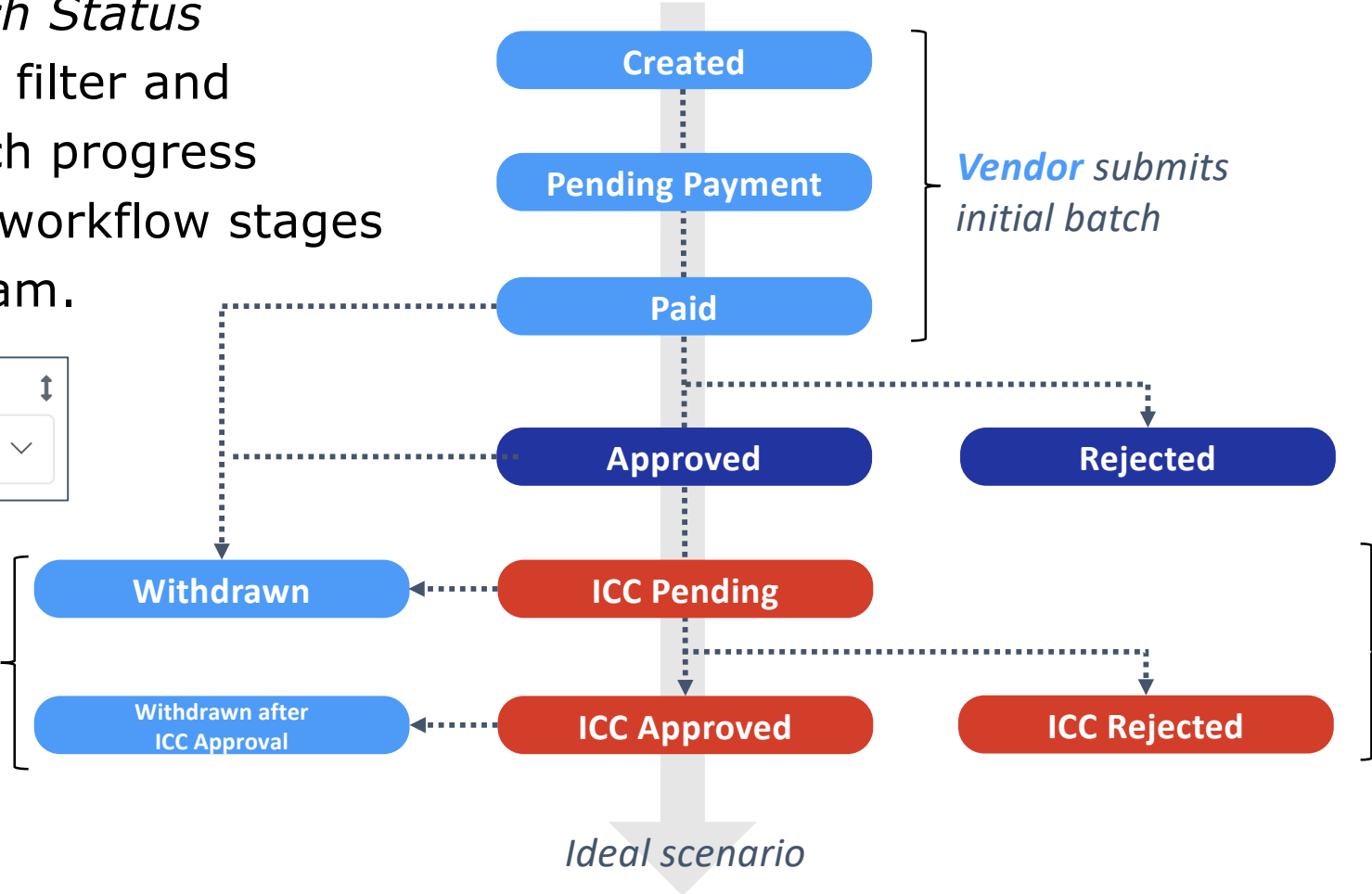


Viewing your batch list

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



Vendor withdraws all applications in batch



PA works with Vendor to qualify and/or rebatch

ICC reviews batches every 2 weeks



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:

- Use the radio buttons to choose the project type to be batched (Distributed Generation or Community Solar) and the REC contract length.
- Select a Vendor number from the dropdown.
- Select the “*Create Batch*” button. You’ll be sent to a page for your new batch.

The screenshot shows a 'Create Batch' pop-up window with the following elements highlighted by green boxes and arrows:


- A 'Create Batch' button in the top right corner of the dashboard, with an arrow pointing to the 'Batch Type' section.
- A green box around the 'Batch Type' section, which includes radio buttons for 'DG' (selected) and 'CS'.
- A green box around the 'REC Contract Type' section, which includes radio buttons for '15 Year Contract' and '20 Year Contract'.
- A green box around the 'Vendor' dropdown menu, with an arrow pointing to the 'Create Batch' button at the bottom.
- A green box around the 'Create Batch' button at the bottom of the pop-up window.

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

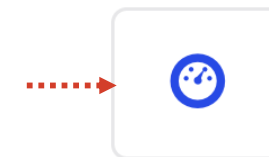
Resuming a batch

(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
<input type="text" value="="/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="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

Search bars

Show/hide columns

Eligible projects

- Matching type
- Submitted status
- Not already in batch

Add/remove projects from batch

Visible vs. total number of eligible projects; page control

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

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

1 to 3 of 3

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 "xRemove" 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?

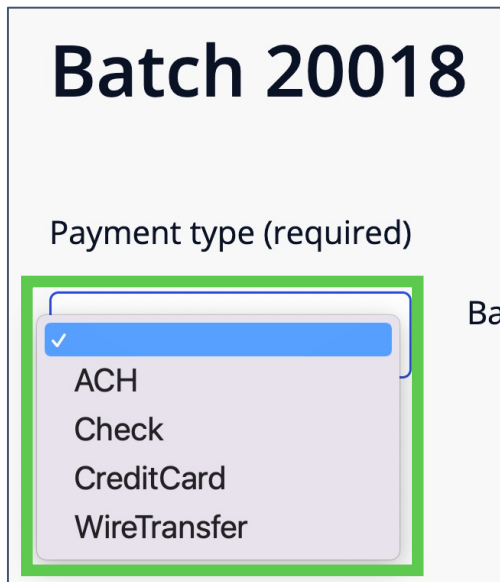
The easiest way is to associate the button with a status:

9	CS	93251	test12	Submitted	<input type="button" value="x Remove"/>	= <i>Included</i>
9	CS	93251	test12	Submitted	<input type="button" value="+ Add"/>	= <i>Excluded</i>

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

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)

Payment type (required) dropdown menu options:

- ACH (selected)
- Check
- CreditCard
- WireTransfer

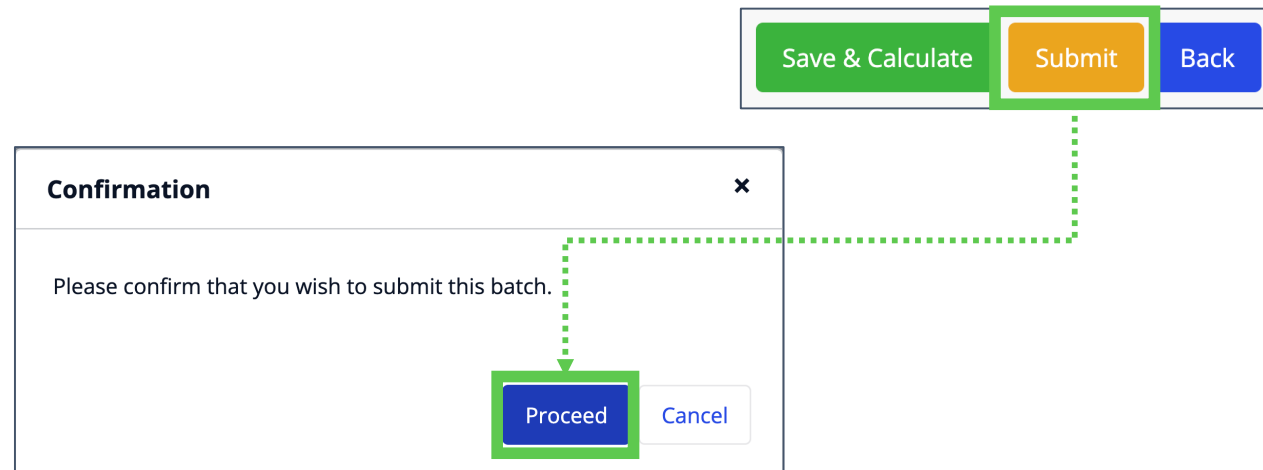
You'll be able to pay the batch fee *after* you finalize and submit the batch.

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.

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.

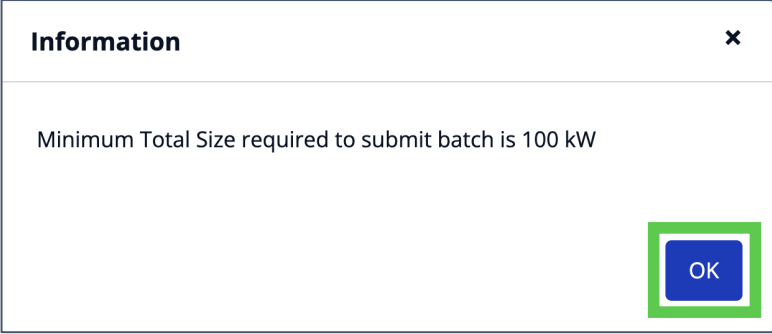


If you're not ready to move ahead, select the "Save & Calculate" button to save your changes for later, and/or select the "Back" button to go back to the Batch View dashboard.

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.

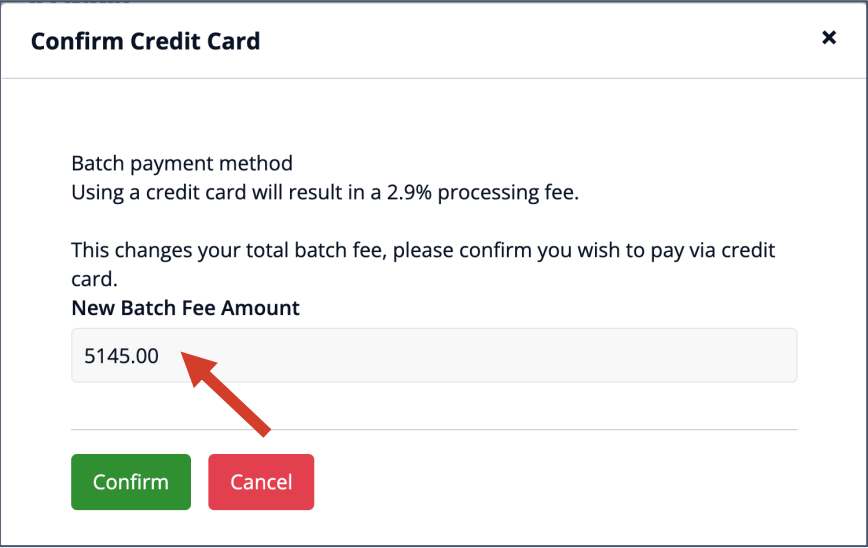
Step 5: If you selected "Credit Card" as your Payment Type in Step 3, the portal will inform you of the 2.9% credit card processing fee and show you a preview of resulting final amount. Select "Confirm" to proceed with credit card. Select "Cancel" to choose a different payment method.



Information

Minimum Total Size required to submit batch is 100 kW

OK



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.

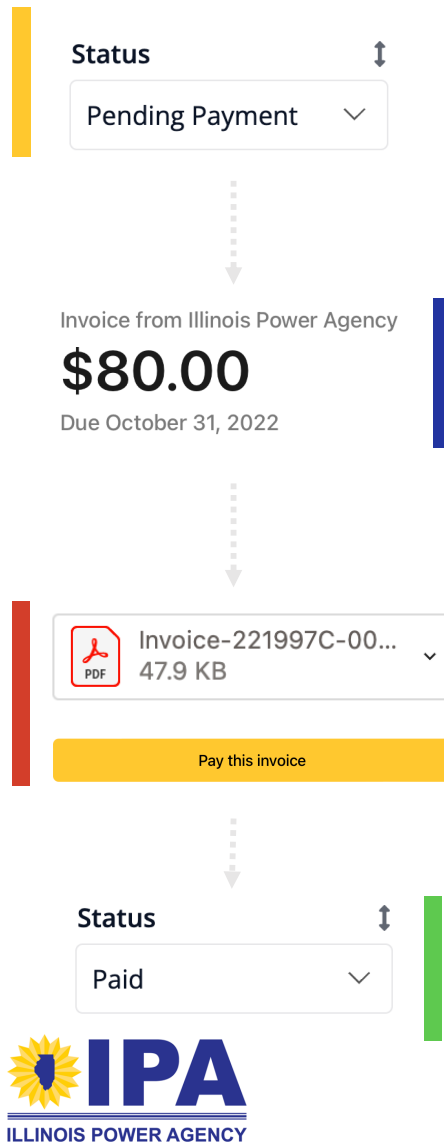
OK

20026	CS	A	Pending Payment	
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Paying your batch fees

Paying your batch fees: workflow



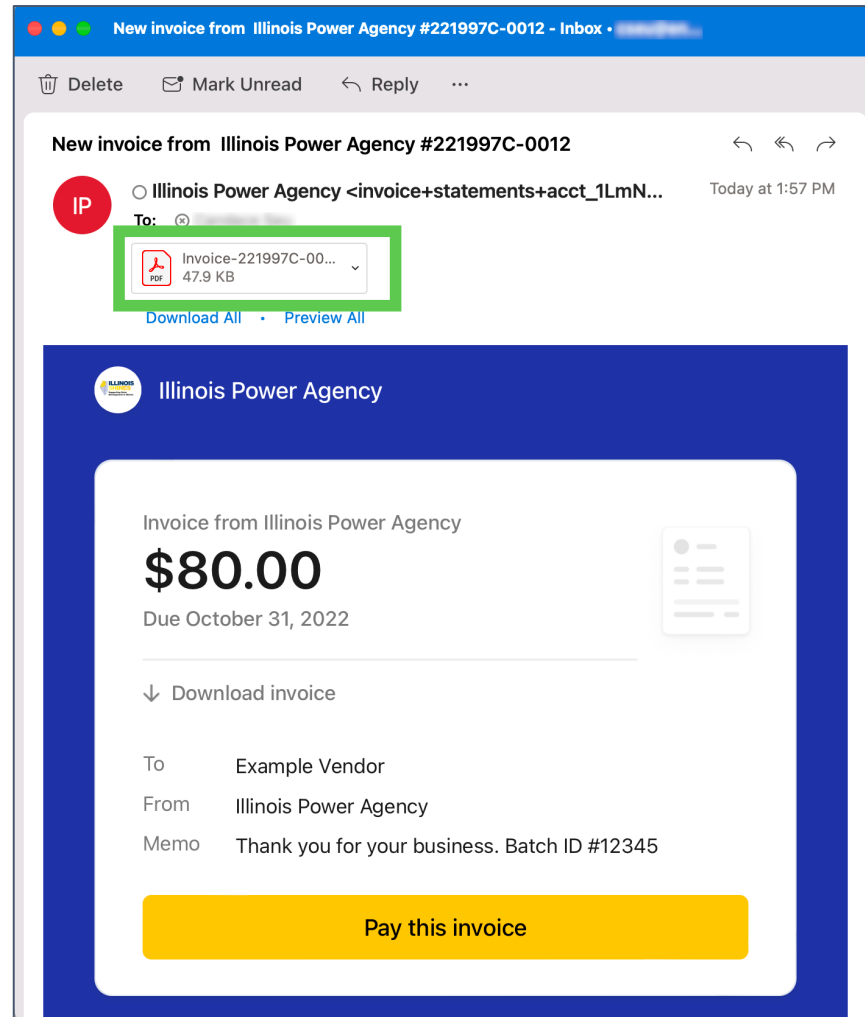
After you've **submitted a batch**, the batch status will change to "Pending Payment".

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



If you previously selected [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.

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

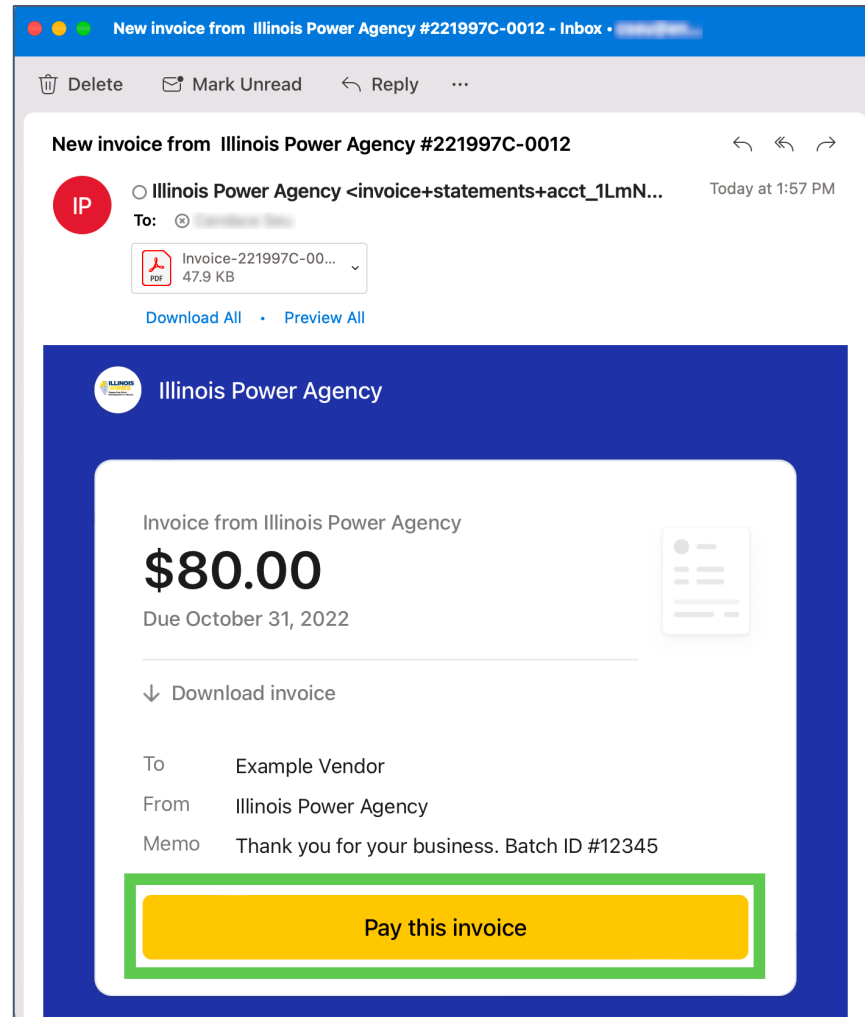
The check must be payable to **Illinois Shines-Cohen Ventures**.

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



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).

https://invoice.stripe.com/i/acct_1LmNo9CH1AnqtiPy/test_YWNjd...

ILLINOIS SHINES
ILLINOIS POWER AGENCY

Illinois Power Agency TEST

\$80.00
Due October 31, 2022

To Example Vendor
From Illinois Power Agency
Invoice #221997C-0012
Memo Thank you for your business.
Batch ID #12345

View invoice details >

Paying by card via Stripe

If you previously selected [pay by] "Card":

- **Step 4:** In the "Pay with card" section on the bottom half of the screen, enter your credit card information as prompted and select the "Pay" button to authorize.

The 2.9% card processing fee will be added at this point in Stripe.

Pay with card

Card information

4242 4242 4242 4242 VISA

12 / 23 123

Pay \$5,290.00

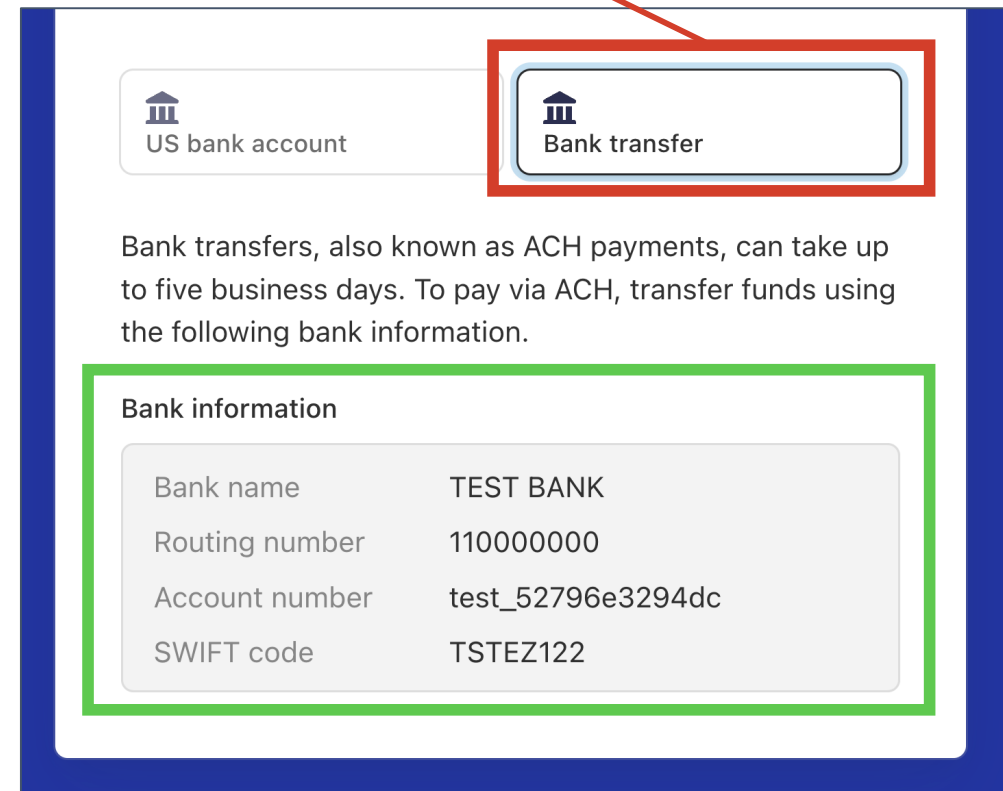
Paying by wire transfer via Stripe

If you previously selected [pay by] "Wire transfer":

- **Step 4:** For **wire transfer**, select the "*Bank transfer*" button. You'll need to log in to your bank's website or call your bank to authorize the transaction.

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

Wire transfer option



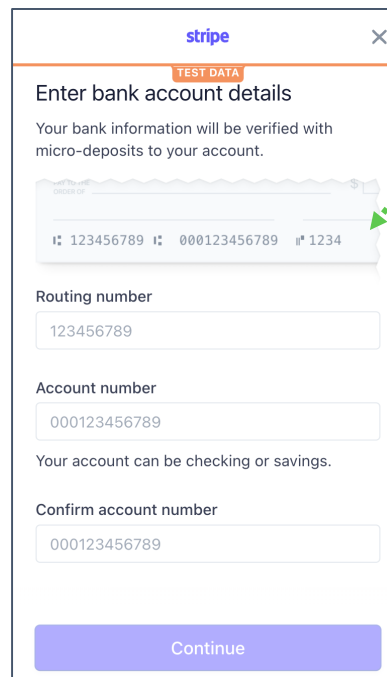
The screenshot shows a payment interface with two options: "US bank account" and "Bank transfer". The "Bank transfer" option is highlighted with a red box. Below the options, there is a text block explaining that bank transfers (ACH payments) can take up to five business days. Below that, a table titled "Bank information" is shown, which is also highlighted with a green box. The table contains the following information:

Bank information	
Bank name	TEST BANK
Routing number	110000000
Account number	test_52796e3294dc
SWIFT code	TSTEZ122

Paying by ACH via Stripe

If you previously selected [pay by] "ACH":

- **Step 4:** For **ACH direct debit**, select the "US bank account" option.
- You may need to search for your bank and go through the bank verification process as shown.



stripe

TEST DATA

Enter bank account details

Your bank information will be verified with micro-deposits to your account.

123456789 000123456789 1234

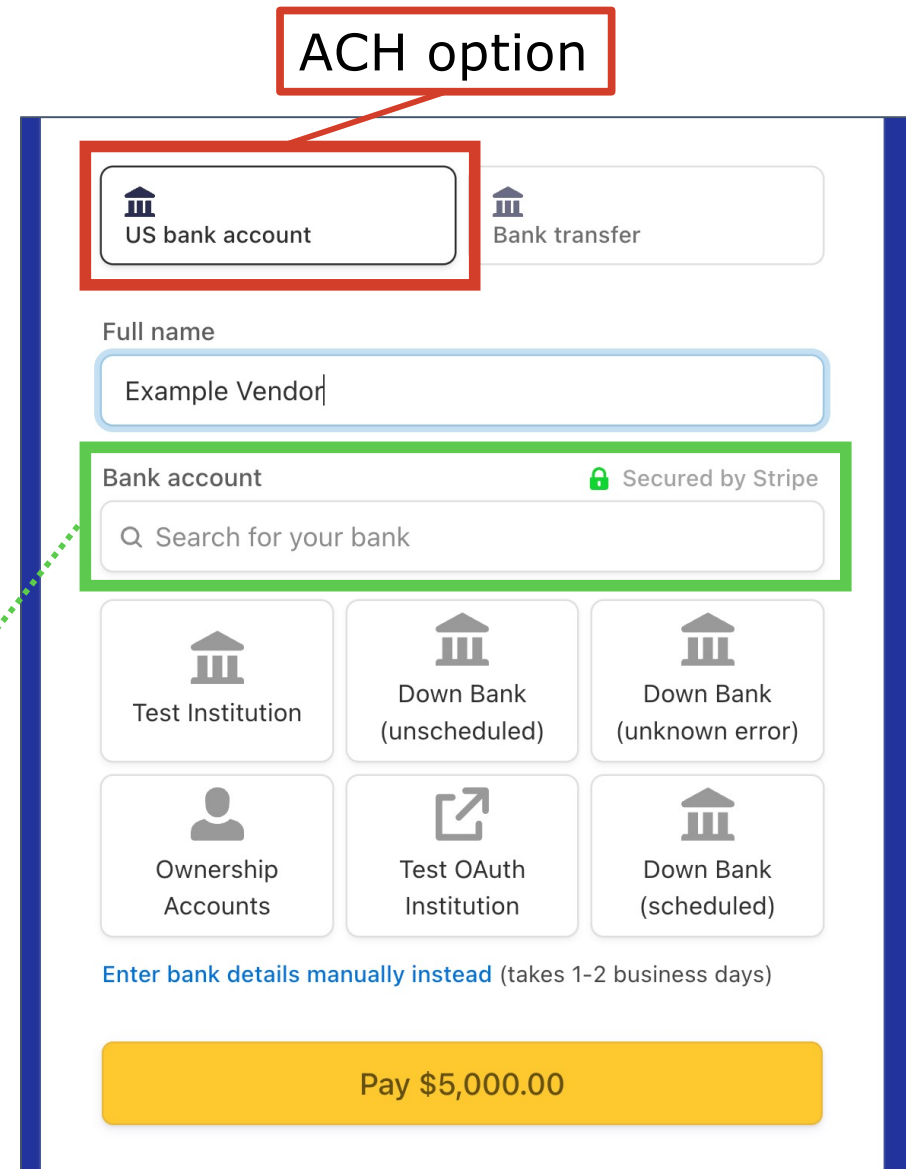
Routing number
123456789

Account number
000123456789

Your account can be checking or savings.

Confirm account number
000123456789

Continue



ACH option

US bank account Bank transfer

Full name
Example Vendor

Bank account Secured by Stripe

Q Search for your bank

Test Institution Down Bank (unscheduled) Down Bank (unknown error)

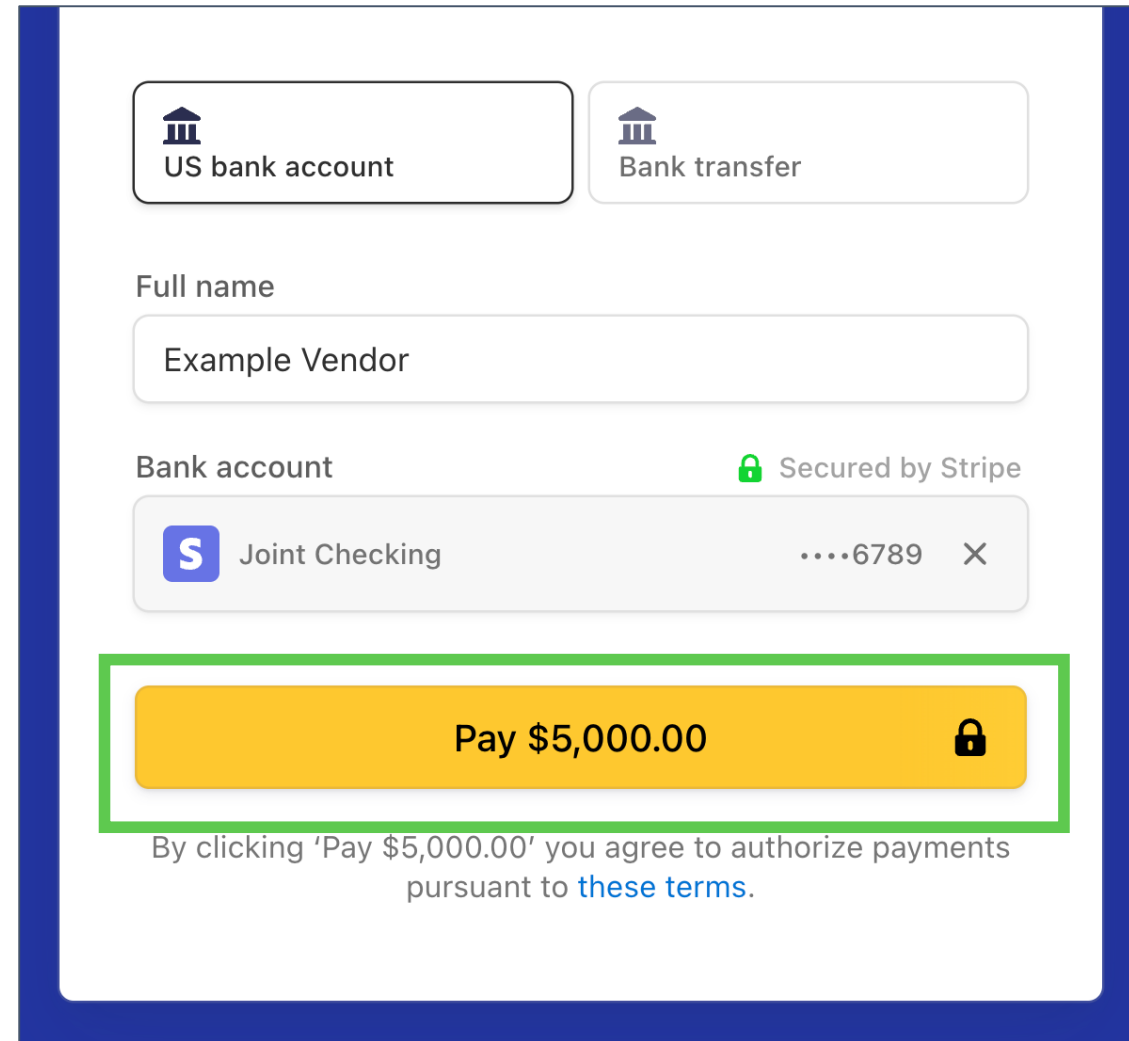
Ownership Accounts Test OAuth Institution Down Bank (scheduled)

Enter bank details manually instead (takes 1-2 business days)

Pay \$5,000.00

Paying by ACH via Stripe

- After you've 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".



The screenshot displays the Stripe payment interface. At the top, there are two buttons: "US bank account" and "Bank transfer". Below these is a "Full name" field containing "Example Vendor". The "Bank account" section shows "Joint Checking" with a masked card number "....6789" and a lock icon. A prominent yellow button labeled "Pay \$5,000.00" with a lock icon is highlighted with a green border. Below the button, a disclaimer states: "By clicking 'Pay \$5,000.00' you agree to authorize payments pursuant to [these terms](#)."

Downloading your payment receipt

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.

Receipt	
Invoice number	221997C-0012
Receipt number	2961-7397
Date paid	October 21, 2022
Payment method	Visa - 4242

https://invoice.stripe.com/i/acct_1LmNo9CH1AnqtiPy/test_YWNjd...

ILLINOIS POWER AGENCY TEST

Invoice paid
\$80.00
View invoice details >

Invoice number 221997C-0012
Payment date October 21, 2022
Payment method Visa •••• 4242

Download receipt
Download invoice

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"

Questions?

Contact Program Administration Support:

admin@illinoisabp.com

877.783.1820

