

# Designee Request Form

Section 6.9.1 of the Revised Long-Term Plan describes a new requirement for any third-party (i.e., non-Approved Vendor) entities that have direct interaction with end-use customers of the ABP to register as a Designee and be listed on the ABP and Illinois Shines websites, along with the Approved Vendors with which they work. The purpose of this new requirement is to increase transparency for the Program. Potential customers will be able to verify that a company that reaches out to them is a registered Program participant and likewise be able to review if they are listed in the Program's consumer complaint database or the disciplinary actions report. All Designees will be added to the Program's Designee database once registered. This database will be housed on both the ABP and Illinois Shines websites. **Moving forward, all third-party entities that have direct interaction with end-use customers of the ABP and that operate within the Illinois Adjustable Block Program need to register by submitting a Designee Request Form, which is a temporary process during the program transition. Please note that portal access for new designees will be delayed until September, 2022.**

- Disclosure Form Designee — An entity that is permitted to generate Disclosure Forms on behalf of an Approved Vendor.
- Community Solar Subscriber Designee — An entity that is permitted to manage the community solar subscription information for an Approved Vendor's community solar projects.
- Marketing or Sales Designee — An entity that is designated to act as a marketing agent and/or customer acquisition agent on behalf of an Approved Vendor or Designee. This includes, among others, entities that engage in solicitations through any channel (in-person, telephone, etc.), as well as entities that perform online lead generation services.
- Installer Designee — An entity that has been designated to install systems on behalf of an Approved Vendor or Designee.

The IPA and Program Administrator reserve the right to add or remove roles as needed over time. Once a Designee as completed, initialed, and signed the Designee Request Form, it should be emailed to the Approved Vendor to return to the Program Administrator. In writing, the Approved Vendor must provide approval to the Program Administrator to accept the Designee Request Form. A new Designee is not authorized to act in the indicated role until affirmatively approved in writing by one or more Approved Vendors. A Designee is authorized to act only in that designated role with Approved Vendors that have approved it as a Designee and have not revoked that acceptance.

Existing Designees of an Approved Vendor have 45 days from the release of this Program functionality on October 26, 2020 to register and act in compliance with this new Program requirement. Failure by a Designee to comply with applicable Program requirements could subject the Designee to suspension or termination from registration. If the Designee ignores a suspension or termination decision made by the Program Administrator or the IPA and continues its market activity nonetheless, any Approved Vendor or Designee that works with the Designee during that period may be subject to discipline. Likewise, Approved Vendors and Designees found to be working with entities that fail to register as Designees with the Program will be subject to discipline.

Requested Approved Vendor		Requested Approved Vendor ID	
Name		Company Name	
Street Address		City	
State	Zip Code	Phone	
Email address			
Type of Designee:	Disclosure Form Designee	Community Solar Subscriber Designee	
	Marketing or Sales Designee	Installer Designee	

*Social Media: Please include all social media accounts that contain Illinois Adjustable Block Program (ABP) information, market your company’s ABP offers, and/or connects customers to the ABP.*

*We hereby agree to the following terms and conditions for our approval and ongoing participation as an Approved Vendor Designee (“Designee”) in the Illinois Adjustable Block Program (“ABP”).*

*Please initial below*

We have reviewed and commit to comply with all ABP requirements applicable to our work as a Designee.

We have read, understand, and will abide by the Program’s Marketing Guidelines, Program Guidebook, and associated materials, and commit to ensuring that our employees and any agents operating on our behalf are trained to understand and abide by these requirements.

We acknowledge that, subject to our approval as a Designee by one or more Approved Vendors, we will be listed in a public database of Designees on both the ABP website (illinoisabp.com) and the Illinois Shines website (illinoisshines.com).

We will maintain accurate, current, and comprehensive registration information related to our business relationships with Approved Vendors and acknowledge this information is subject to review, verification, and acceptance by the Approved Vendor.

We acknowledge and accept that Designees that act in violation of ABP requirements are subject to disciplinary action from the IPA which could result in suspension from the ABP of both the Designee and/or any Approved Vendors on whose behalf the Designee ultimately acts.

*Additionally, through my execution below, I assert that I have the authority to enter into binding agreements on behalf of this Designee.*

Signature \_\_\_\_\_ Print Name \_\_\_\_\_  
 Title \_\_\_\_\_ Company \_\_\_\_\_  
 Date \_\_\_\_\_