2023-2024 Community Solar Disclosure Form Walkthrough

A step-by-step portal help guide

Last updated: May 30, 2023

Illinois Shines

Contents

What's a Disclosure Form?

A **Disclosure Form (DF)** is a document that includes key information about a proposed solar project that a customer needs to know. A DF protects customers and Approved Vendors (AVs) by making sure that the terms of the project are clear. DFs have a standardized format that customers can use to directly compare offers.

For CS projects, customers must sign a DF before they can sign the subscription agreement. The AV must upload all subscribers' signed DFs during the Part II application process.

The Disclosure Form Leniency Period for CS projects will end on June 29, 2023. The program requirement for new Community Solar Disclosure Forms to be executed by the customer prior to contract will be reinstated on June 30, 2023.

What's new for CS Disclosure Forms this year?

The 2023-2024 Illinois Shines program year starts on **June 1, 2023**. New disclosure forms will completely replace the old ones on June 1, and AVs/designees <u>must</u> use the new forms going forward. Read the full announcement <u>here</u>.

- **Updated questions:** The Community Solar DFs have been updated with new questions, layouts, and data entry checks to help simplify and clarify DF generation.
- **API upload:** Now available for Community Solar DFs.
- **Redesigned PDFs**: The generated DFs are more compact and easier to read.
- **End of Sharepoint upload**: The workaround process will be discontinued and all forms must be uploaded within the portal (via webform, CSV upload, or API).
- **"TBD" policy:** The "To Be Determined" DF option (Vendor ID 99999) is only valid for Traditional Community Solar (TCS) projects. It <u>cannot</u> be used with Community-Driven Community Solar (CDCS) projects.

What's in this guide?

This guide covers **Community Solar (CS)** DF creation for AVs and Designees using the **2023-2024 Program Year** forms (available June 1, 2023).
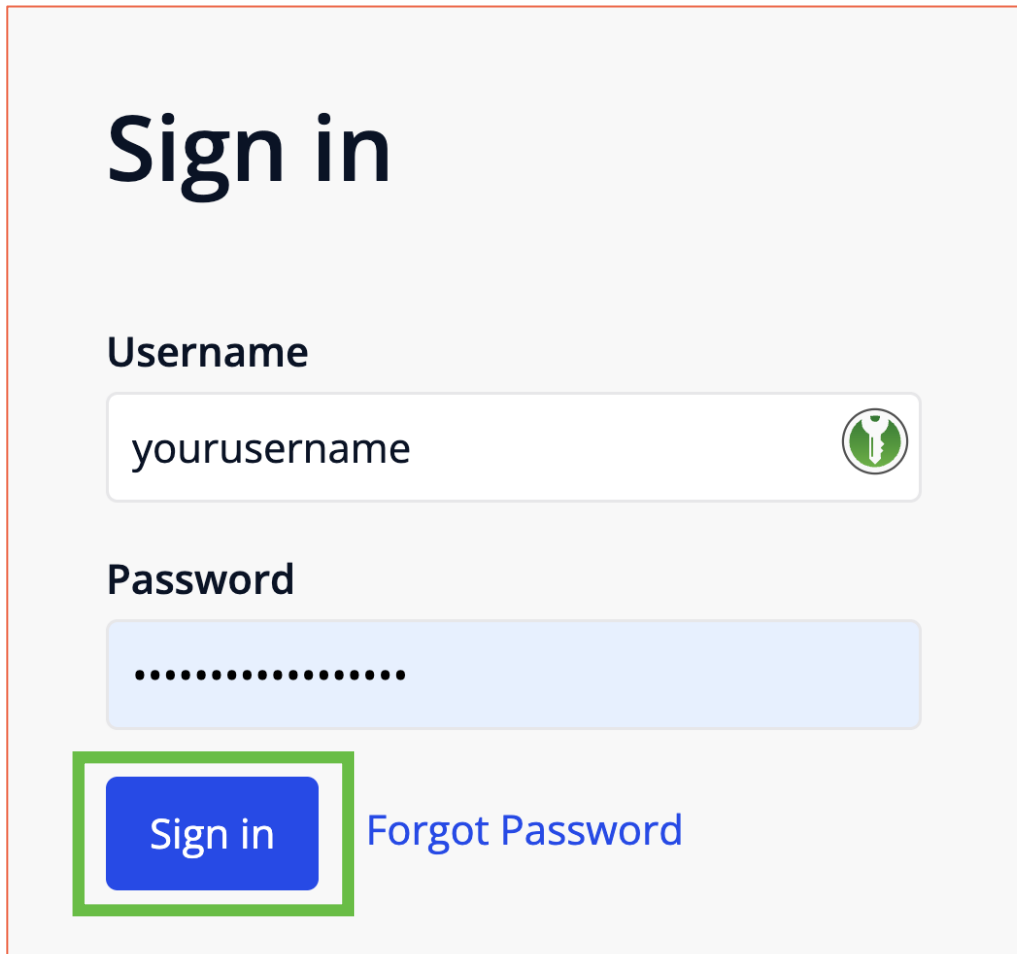
This guide focuses on the **website interface** for generating DFs one at a time. However, those using the CSV or API upload features may find this guide helpful to understand what questions are being asked and when answers (data) are conditionally required.

For walkthroughs of all forms (DG and CS) and entry methods (webform, CSV, and API), please visit the Portal Help Guides page at https://illinoisabp.com/portal-help/.

Getting started

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Getting started: Logging in

Step 1: In your browser, navigate to https://portal.illinoisabp.com/
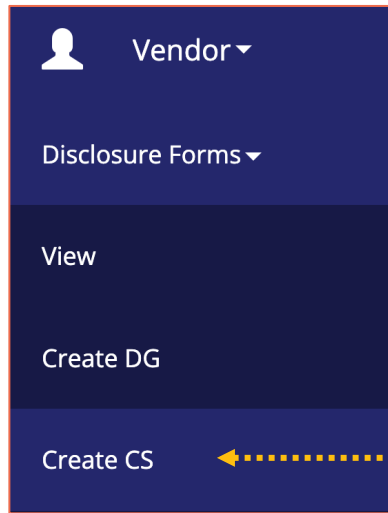
Step 2: Enter your registered username and password.

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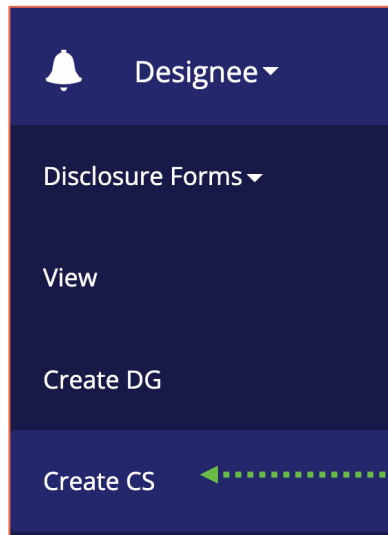- Contact Support for further help at admin@illinoisabp.com

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

Getting started: "Create CS" task

Vendor ▾

Disclosure Forms ▾

View

Create DG

Create CS ◄ - - - - - - - - - - - - -

Designee ▾

Disclosure Forms ▾

View

Create DG

Create CS ◄ - - - - - - - - - - - -

If you're acting as an **AV**

If you're acting as a **designee**

Step 4: In the left menu, select your active role (Vendor or Designee) to expand its sub-menu. Select the "*Disclosure Forms*" functionality and then select the "***Create CS***" task.

If you're an AV but sometimes work as a Designee for other AVs (e.g., you're an AV <u>and</u> a Designee), you may have access to <u>both</u> sub-menus. Make sure you choose "View" from the correct sub-menu for your current intended role/task.

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Getting started: "Create CS" task

Step 5: (Some users only) After you select the "Create CS" task, you'll see a "Select Vendor" pop-up window. Select an AV from the list in the pop-up window. Once it's highlighted, select the *"Proceed"* button to go to the DF Dashboard for that AV.

Getting started: Resume an incomplete DF

If you started creating a DF earlier and want to pick it up again, log in and follow these steps.
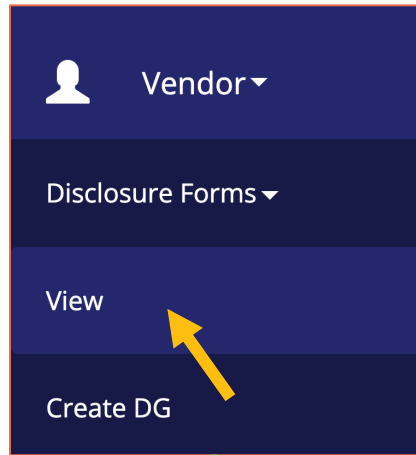
Step 1: Navigate to the Disclosure Forms > **View** task. If prompted, select the Vendor ID/Company Name with the incomplete DF and then select the "*Select Vendor*" button.
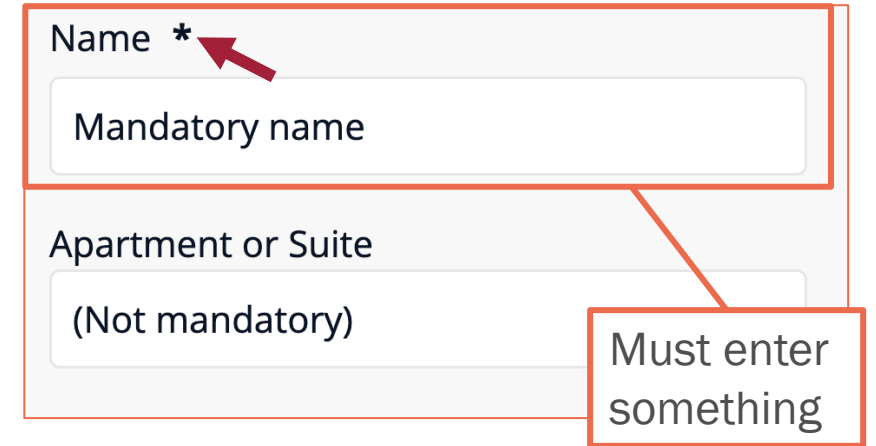
Step 2: The table of existing DFs and drafts will appear. Find your incomplete DF in the list and confirm that its Status is "In Progress." In the Action column, choose the "*Resume Form*" link.

Form ID	System Name	Form Type	Submitted by	Status	Date Started	Date Submitted	Action	Download	View
Search									
251886	Example1	Lease Form	username	In Progress				Resume Form	

Navigating DF creation: general tips

- Fields marked ***** are mandatory.

- Select the "*Save and Continue*" button at the **bottom left** of each section to save your entries and move to the next section.
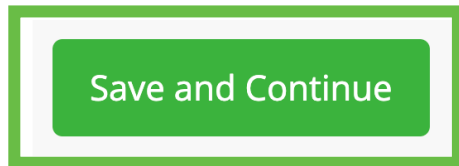
Name *****

Mandatory name

Apartment or Suite

(Not mandatory)

Must enter something

Save and Continue

- If you need to return to an earlier section, select the "*Revisit*" link of that Completed section.

Customer Contact Information   Revisit Complete

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System Lease Walkthrough (Portal Help Guides)

Starting a new CS DF (Section 0)

When you start or return to a CS DF, you should see a DF number at the top of your screen:

New Community Solar Disclosure Form

If any of the selections below do not align with this project's model, please contact the Program Administrator.

Form ID: 457778   Vendor *

Step 1: *Vendor ID*. Confirm that the number at the top of this section matches the Vendor for whom you're preparing the DF. To change AVs, click or select from the list below the search bars.

Vendor ID for this form: 4

Vendor ID ↕	Company Name ↕
= Search	Ab
4	Company 1
101	Company 2

Starting a new CS DF (Section 0)

Step 2: *Disclosure Form Name.* Enter a uniquely identifying name for this DF. The name cannot exist in your previous DFs.

Step 3: *Project Application.* If you <u>previously submitted</u> a Part I Application under your selected AV for this project, use the dropdown to find and select the project name. Key data for the project will be shown on the PDF.

Disclosure Form Name*

Project name

If you would like to associate a project application with this form, please select below. Otherwise, please proceed without a project selected.

✓ Select Project Application
Example Existing CS Project

If you're generating a "TBD DF," *i.e.,* a DF for a project that does not yet have a Part I application, leave the dropdown on *"Select Project Application."* **The TBD DF must be for a TCS project.**

If you don't see the Project Application you want in the list, make sure you've selected the right AV and that the **CS** Application's status is "Submitted", "Verified", or "Reviewed."

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Starting a new CS DF (Section 0)

Step 4: *Disclosure Form Language.* Select the checkbox to generate the form in Spanish. Leave it <u>blank</u> to generate a form in English.

Export PDF in Spanish?

Step 5: Select the "*Save and Continue*" button to move to the next section.

Save and Continue

> You can return to this top section to change your selections at any time before you "*Submit and Download*" the form. Make sure that you select the "*Save and Continue*" button after making your changes.

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Subscriber Contact Information (Section 1)

Subscriber Contact Information (Section 1)

Step 1: *Subscriber's contact information.* Enter the subscriber's physical address, phone number, and email address in the input fields.

Email *

jdoe@illinoisabp.com

† For any customer without an email address, you must download, have the customer sign, and then upload the email waiver form before you can generate a Disclosure Form.

If the subscriber does not have email, enter your own address in the "Email" field. The subscriber will need to sign a physical copy of the disclosure form and the linked email waiver form. You'll scan and upload both.

Subscriber Contact Information (Section 1)

Step 2: *Subscriber's Electric Utility.* Use the dropdown box to select the subscriber's electric utility company.

> As noted in the screenshot, only the top three utilities are valid for CS DFs, even though others are listed in the dropdown box.

Step 3: *Utility Account Number.* Free text entry - include any dashes, spaces, or non-numeric characters.

Subscriber's Electric Utility *

Please note that you can only use "Ameren Illinois", "ComEd", and "Jo-Carroll Energy Co-op Inc." on a CS Form

✓ Select an option
Ameren Illinois
ComEd
Jo-Carroll Energy Co-op Inc.
MidAmerican
Mt. Carmel
Municipal Utility
Rural Electric Cooperative

Subscriber's Utility Account Number *

(Free text entry)

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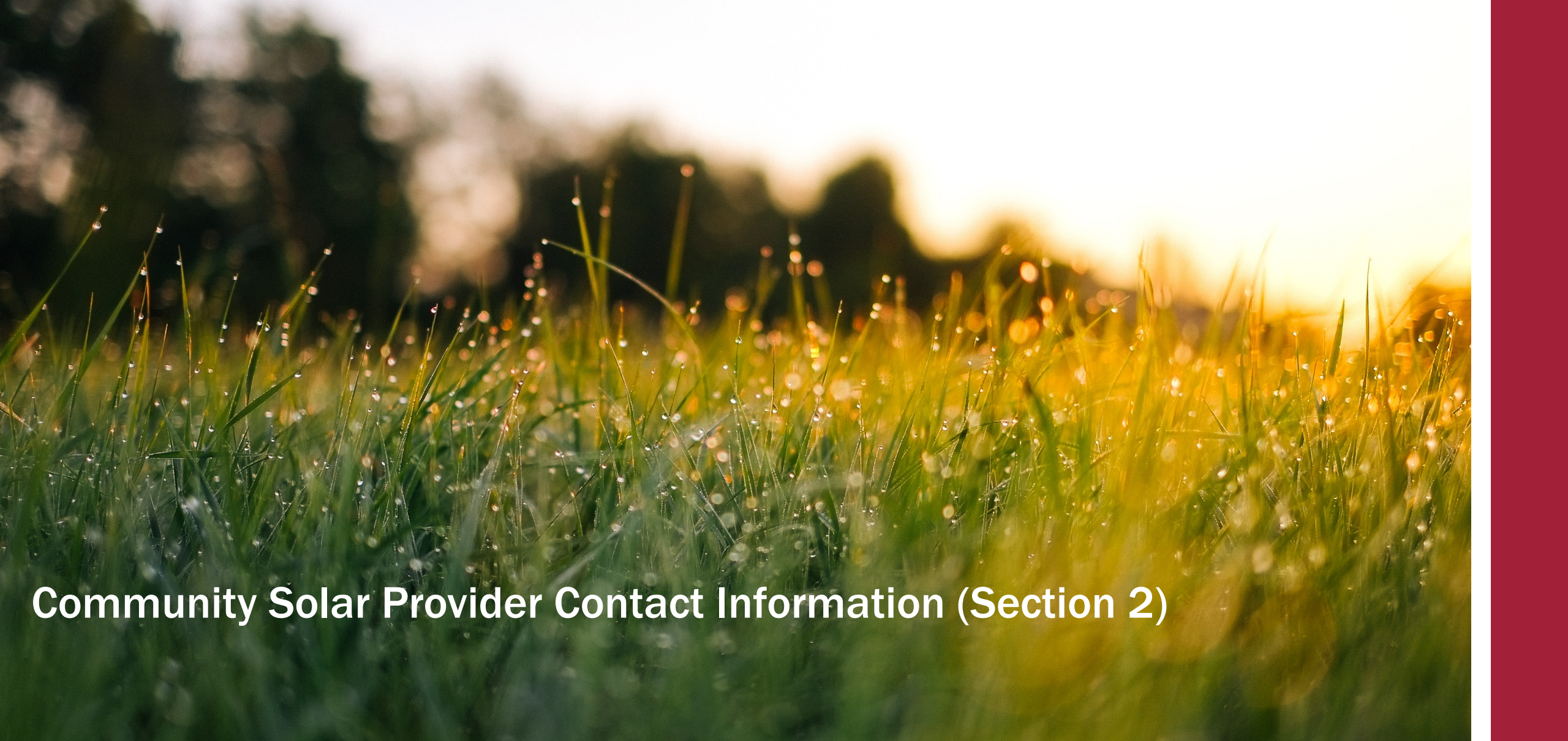
Community Solar Provider Contact Information (Section 2)

Community Solar Provider Contact Information (Section 2)

Step 1: *Provider's Address, Phone, etc.* Enter the provider's business contact information in the labeled input fields.

> If the provider does not have a website, you can type "<u>none</u>".

Step 2: Select the "*Save and Continue*" button to move to the next section.

Project Information (Section 3)

Project Information (Section 3)

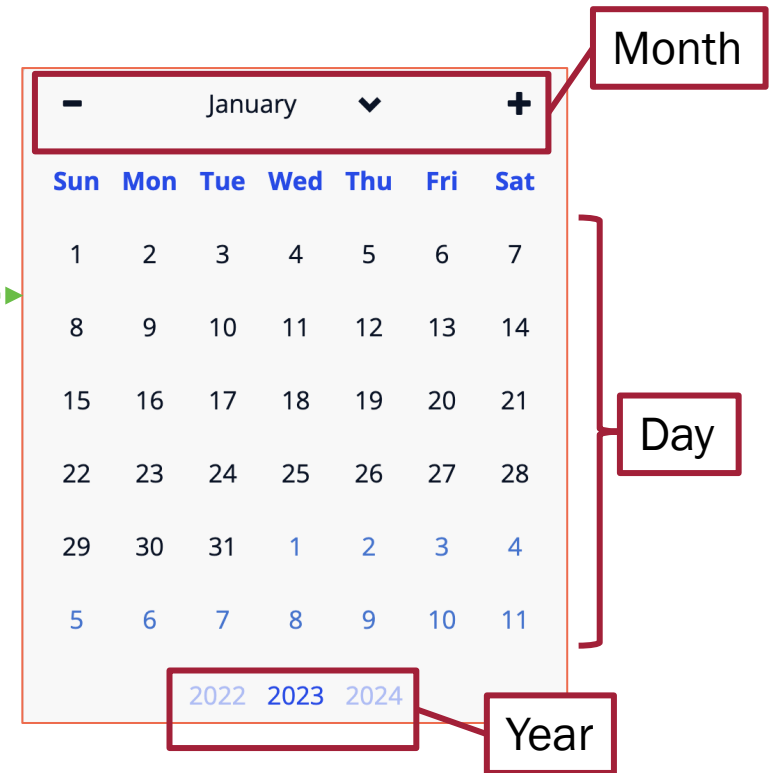You'll see this section only if you're creating a DF for a project that already has a Part 1 project application.

Step 1: *Estimated (or existing) date of operation.* Enter a date as shown (mm-dd-yyyy format) or click the calendar button (📅) to select from a pop-up:

- Change the **month** using the dropdown and -/+ buttons at the top of the pop-up.
- Change the **year** at the bottom of the pop-up.
- Finally, select a **day** to auto-fill the full date.

Month

—		January	**⌄**			**+**
Sun	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11
		2022	**2023**	2024		

Day

Year

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Project Information (Section 3)

You'll see these questions only if you're creating a DF for a project that already has a Part 1 project application.

Step 2A: *Refund Type.* Use the dropdown to select a refund type. If you select "<u>Partial</u>" or "<u>Full</u>," an additional question will appear.

What type of refund will the CS provider make to the subscriber if the project is not completed or energized by the specific date (entered in the field below if refund is provided) *

✓ Select an option
 No Refund
 Partial Refund
 Full Refund
 N/A - no payments until project is operating
 N/A - project is already operational

Step 2B: *Refund schedule.* If a **partial refund or full refund** will be provided if the project is not completed/energized, type or use the calendar button to enter a date in the new field.

Date subscriber will receive a refund if the CS project is not completed or energized *

mm-dd-yyyy

Subscription Information (Section 4)

Subscription Information (Section 4)

Step 1: *Subscription size.* Enter a number with up to 2 decimal places.

Subscription Size (kW AC) *****

00.00

Step 2A: *Guaranteed minimum.* Use the dropdown to select "Yes" or "No." If you select "<u>No</u>," skip to Step 3. If you select "<u>Yes</u>," a new question will appear.

Is there a guaranteed minimum level of electricity production? *****

Yes

Provide details about dollar amount and the frequency or basis of guaranteed bill credits for subscription *****

(Enter any text)

Step 2B: *Guaranteed bill credit amount and frequency.* Enter any text to describe <u>both</u>. For example, you can enter the amount in <u>$00.00</u> format, along with the frequency as a phrase ("<u>guaranteed each month</u>," "<u>guaranteed each year</u>," etc.)

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Subscription Information (Section 4)

Step 3: *Estimated date when bill credits start*. Use the 📅 icon to select any date within a month to set the estimated date to that month. Alternatively, you can directly type the month name-YYYY (example: <u>December-2023</u>).

> If you need to select a new date, you can delete your entry and the calendar icon will reappear.

Estimated date when subscriber will start receiving bill credits through CS subscription *

Select any date within the desired month | 📅

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Subscription Information (Section 4)

Step 4: *Estimated 1st year production.* Enter a number with up to 2 decimal places.

Estimated first year annual electricity production for the subscription (kWh) based on project design and environmental factors *

> 00.00

Step 5: *Term of subscription.* The term length is in years and months. Enter <u>both</u> as whole numbers.

(Example: <u>10</u> years and <u>0</u> months).

Term of Subscription (duration for which subscriber will receive bill credits). Please enter the entire contract duration in years and remainder months *

> 0 years and 0 months

If the number of months is 12 or greater, you'll need to convert that into years. For example, if the term is 30 months, you should enter <u>2</u> years and <u>6</u> months.

Rate and Payment Information (Section 5)

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Rate and Payment Information (Section 5)

Step 1A: *Subscription type payment structure.* Use the dropdown to select your option…

If none of the selections are accurate, please select 'None' and provide additional details for the subscription type in the next text box (Step 1B). If you want to request that an additional payment structure is added to the list, email admin@illinoisabp.com with your disclosure form number, a proposed name for your new subscription type, and a description of how it works. The Program Administrator will review and evaluate your request.

Rate and Payment Information (Section 5)

Step 1B: *Subscription type follow up: pricing details.*

If you selected...	Then enter...
Set Payment *or* Price per kWh produced by subscription	a fixed dollar amount with two decimal places (omit commas and $ sign)
Set payment with annual escalation rate *or* Price per kWh produced by subscription with annual escalation rate	payment -- as a fixed dollar amount with two decimal places (omit commas and $ sign) escalation rate -- as a percentage with up to two decimal places (omit % sign)
% of community solar credits on the utility bill	a percentage with up to two decimal places (omit % sign)
kWh produced by subscription multiplied by a variable rate	free text describing the method or formula used (**Example:** "$0.11/kWh up to 500 kWh/month and $0.15/kWh thereafter")
None	free text describing your subscription pricing *(please send the description to admin@illinoisabp.com)*

Rate and Payment Information (Section 5)

Step 2: *Format of bill.* Use the dropdown to select the delivery method.

Step 3: *Deposit or down payment at signing.* Enter a dollar amount (omit commas and the $ sign).

Step 4: *Payment frequency and start date.* Free text entry – please describe both. For example, the frequency can be "Monthly" or "Every two weeks," while the start date can be "at energization," "one month after energization," etc.

Format of Bill *****

✓ Select an option
Electronic
Paper
Customer chooses paper or electronic

The deposit, down payment, or initial amount owed at contract signing ($00.00) *****

00.00

Frequency of payments and start date *****

Rate and Payment Information (Section 5)

Step 5A: *Subscription fee included in utility bill.* Use the dropdown to select "Yes" or "No." If you select "<u>No</u>," you'll need to provide more details in Step 5B.

Will subscription fee payment be administered through the subscriber utility bill? *

✓ Select an option
Yes
No

Step 5B: *Subscription auto-pay.* Use the dropdown to select whether Auto-Pay is required.

Auto-Pay Required? *

✓ Select an option
Yes
No

Early Termination of Subscription (Section 6)

Early Termination of Subscription (Section 6)

Step 1 *Early termination.*
Enter the permitting circumstances as free text.

Step 2 *Advance notice required?* Use the dropdown to select "Yes" or "No." If you select "<u>Yes</u>," you'll need to explain the requirements (example: "<u>30 days notice</u>").

Step 3: *Fee for early termination?* Use the dropdown to select "Yes" or "No." If you select "<u>Yes</u>," explain how the fee will be calculated and applied (example: "<u>Early termination fee is equal to the deposit payment</u>").

Additional circumstances that allow for early termination other than moving outside your electric service utility territory *****

[ex: Additional circumstances; None]

Is advanced notice required for early termination? *****

[Yes ⌄]

Please explain advanced notice requirements *****

[   ]

Will the CS provider impose a fee or penalty for early termination of the subscription? *****

[Yes ⌄]

Please explain how fee or penalty will be applied *****

[   ]

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Other Fees and Costs (Section 7)

Other Fees and Costs (Section 7)

Step 1: *List of fees.* Select the [+] button to add a fee item. Select the [🗑] button to delete a fee item. Select "Save and Continue" when you are done entering fees.

List all other fees associated with the CS subscription (for example, late fees, interconnection fees, maintenance fees, etc.) and the amount of each one and when it is due.

Fee	Amount ($)	When Applicable	[+]
Ex: Late payment fee	00.00	Ex: Payment more than 30 day	[🗑]

All fields are free text entry

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System Lease Walkthrough (Portal Help Guides)

Additional Terms and Disclosures (Section 8)

Additional Terms and Disclosures (Section 8)

Step 2A: *Alternative Retail Electric Supplier required?.* Use the dropdown to select "Yes" or "No." If you select "<u>Yes</u>," the section will expand with several follow-up questions.

Step 2B: *Name of supplier.* Enter the name as free text.

Step 2C: *Energy supply rate.* Enter a number with two decimal places (omit the $ sign).

Step 2D: *Method.* Enter the method or formula as free text.

Alternative Electric Suppliers

Does the subscription require the subscriber to receive service from a specific Alternative Retail Electric Supplier *

Yes

Name of Alternative Retail Electric Supplier *

Company name

The energy supply rate initially charged ($/kWh) *

00.00

The method and formula that will be used to determine the energy supply rate over the full term of the CS subscription *

37

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Additional Terms and Disclosures (Section 8)

Step 3: *Authorization as agent*. Use the dropdown to select "Yes" or "No."

Does this offer require the community solar provider to act as the customer's agent to manage the customer's electric utility account? *

✓ Select an option

Yes

No

Step 4: *Additional details*. (Optional) Enter any additional details about <u>any</u> section or aspect of the disclosure form here as free text.

Additional details and explanatory information

Additional Details or Explanatory Information

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Submit and Download (Section 9)

Submit and Download (Section 9)

Step 1: Review your form by selecting the *"Revisit"* links on each of the sections above.

> Once you Submit this section, your form will be locked. If you want to change anything after that, you'll need to generate a new form instead.

Step 2: If you're happy with your review from Step 1, take note of your form ID and select the *"Submit and Download"* button.

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Submit and Download (Section 9)

Step 3: Once your data has been fully transmitted and saved, you'll see a "Submitted" success message.

You can select the *"View Form Data"* button to review your form in the portal, or *"View Form PDF"* to download a PDF copy of your form.

At the bottom of this screen, you can select *"Request E-signature"* to send the form to your customer via HelloSign or *"Download file for physical signature"* to download a printable PDF. Check out the "Manage Your Disclosure Forms" walkthrough at our Portal Help Guide page to learn how to use these options.

Consumer Disclosure Form - Upload

System Name: Test name (ID # 235197)

Form Status: Submitted

[View Form Data]

[View Form PDF]

Please choose E-signature or Download PDF (for wet-signature) option below-

Please verify following required information if requesting E-Signature-

Recipient Email * | customer@email.com |

Recipient Name * | First Last |

[Save]

Download file for physical signature

Send to Customer for E-Signature

[✉ Request E-Signature]   [⬇ Download Disclosure Form PDF]

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Submit and Download (Section 9)

Step 4: *View Form Data.* (Optional) Select this button to view your completed form as a webpage within the portal. A demonstration of what this looks like is shown on the next few pages. Note that the answers should not be taken as sample answers.

Subscriber Contact Information

Completed

Name *

First Last

Street *

123 Illinois St

Apartment or Suite

Unit 456

City *

Chicago

State *

Illinois

ZIP Code *

60131

Phone *

123-123-1234

Email *

jdoe@illinoisabp.com

For any customer without an email address, you must download, have the customer sign, and then upload the email waiver form before you can generate a Disclosure Form. The email waiver form is available in the Additional Terms and Disclosures section below.

Subscriber's Electric Utility *

Ameren Illinois

Subscriber's Utility Account Number *

test-44518

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Community Solar Provider Contact Information **Completed**

Legal Name *****

Company name

Name Used for Marketing (if different)

Phone *****

123-123-1234

Email *****

jdoe@illinoisabp.com

Website *****

None

Project Information **Completed**

Estimated date of operation. If the project is already operational please enter the date of operation *

Type of refund subscriber will receive, as sum of CS payments to date, if the project is not completed or energized *

Select an option

> The project information section is filled if you generated a Disclosure Form for an existing project (as shown). If you generated a DF for a "TBD" project, project information will not be shown in this view.

Subscription Information

Subscription Size (kW AC) *****

6.20

Is there a guaranteed minimum level of electricity production? *****

No ⌄

Estimated date when subscriber will start receiving bill credits through CS subscription *****

August-2023

Completed

Estimated first year annual electricity production for the subscription (kWh) based on project design and environmental factors *****

10000.00

Term of Subscription (duration for which subscriber will receive bill credits). Please enter the entire contract duration in years and remainder months *****

7 years and 0 months

Rate and Payment Information

Completed

Subscription Type *****

| Set payment with annual escalation rate | ⌄ |

If the subscription type for this project does not align with the selections provided, please select "None" and contact the Program Administrator to request that additional payment structures are incorporated into future Disclosure Forms.

Set Payment Amount ($) *****

| 25.80 |

Annual Escalation Rate (%) *****

| 1.20 |

Format of Bill *****

| Customer chooses paper or electronic | ⌄ |

The deposit, down payment, or initial amount owed at contract signing ($00.00) *****

| 125.00 |

Frequency of payments and start date *****

| Monthly, one month after energization |

Payments are monthly, beginning one month after Energization.
Will subscription fee payment be administered through the subscriber utility bill? *****

| Yes | ⌄ |

Early Termination of Subscription

Completed

Additional circumstances that allow for early termination other than moving outside your electric service utility territory *****

Will the CS provider impose a fee or penalty for early termination of the subscription? *****

None

No   ⌄

Is advanced notice required for early termination? *****

No   ⌄

Other Fees and Costs

Completed

List all other fees associated with the CS subscription (for example, late fees, interconnection fees, maintenance fees, etc.) and the amount of each one and when it is due.

Fee	Amount ($)	When Applicable
Example late fee	120.00	Payment more than 10 days late

Additional Terms and Disclosures

Alternative Electric Suppliers

Does the subscription require the subscriber to receive service from a specific Alternative Retail Electric Supplier *

| Yes   ⌄ |

Name of Alternative Retail Electric Supplier *

| Company name |

Authorization to manage your utility account and bill payment

The method and formula that will be used to determine the energy supply rate over the full term of the CS subscription *

| Example method |

Does this offer require the community solar provider to act as the customer's agent to manage the customer's electric utility account? *

| Yes   ⌄ |

Additional details and explanatory information

Additional Details or Explanatory Information

| |

Submit and Download

[Upload or review documents]

Completed

The energy supply rate initially charged ($/kWh) *

| 0.17 |

Completed

About Energy Solutions

Energy Solutions

At Energy Solutions we focus on big impacts. And we believe that creating solutions that align with the needs of the market is a powerful force for delivering large-scale energy, carbon and water-use savings. For 25 years we've harnessed this power to offer proven, performance-based solutions for our utility, government, and institutional customers.

Questions?

Contact Program Administration Support:

admin@illinoisabp.com

877.783.1820

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