

2023-2024 Distributed Generation Project Lease Disclosure Form Walkthrough

A step-by-step portal
help guide

Last updated: May 30, 2023



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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.

Before an AV can submit a Part I Distributed Generation (DG) application, the AV must create a DF and have the customer sign a copy. The information from the DF will be automatically transferred to the Project Application.

What's new for DG 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 must use the new forms going forward. Read the full announcement [here](#).

- **The “Over 25 kW” DG form has been retired:** Please use the form that corresponds to your project’s financing model (Purchase, Lease, or PPA) regardless of size.
- **Updated questions:** All forms (web and CSV) have been updated with new questions, layouts, and data entry checks to help clarify the DF generation process.
- **Redesigned PDFs:** The generated DFs are more compact and easier to read.

For walkthroughs and help guides on all forms and entry methods, please visit the Portal Help Guides page (<https://illinoisabp.com/portal-help/>)

What's in this guide?

This guide covers **Project Lease Distributed Generation (DG)** 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

Getting started: Logging in

Sign in

Username



Password

Sign in [Forgot Password](#)

Step 1: In your browser, navigate to

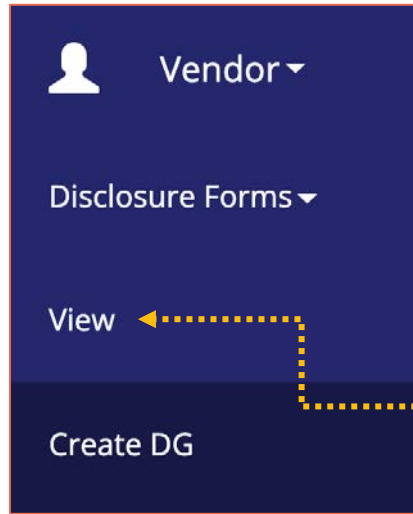
<https://portal.illinoisabp.com/>

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

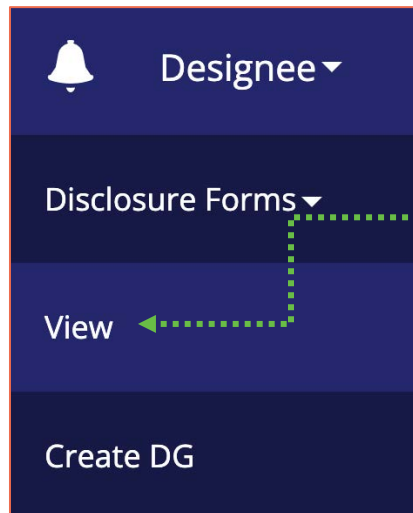
Step 3: Select "*Sign In*" to be taken to your Dashboard.

Getting started: “Disclosure Forms” menu



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 “**View**” task.

If you're acting as an AV

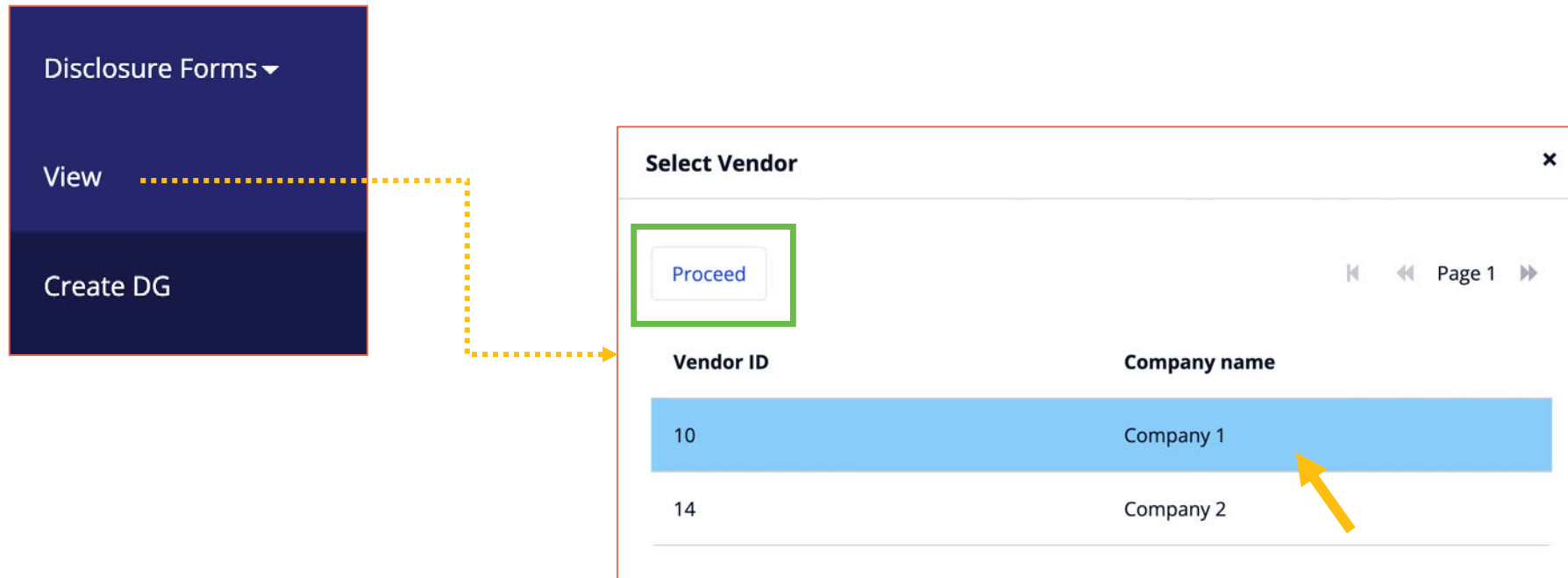


If you're acting as a designee

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

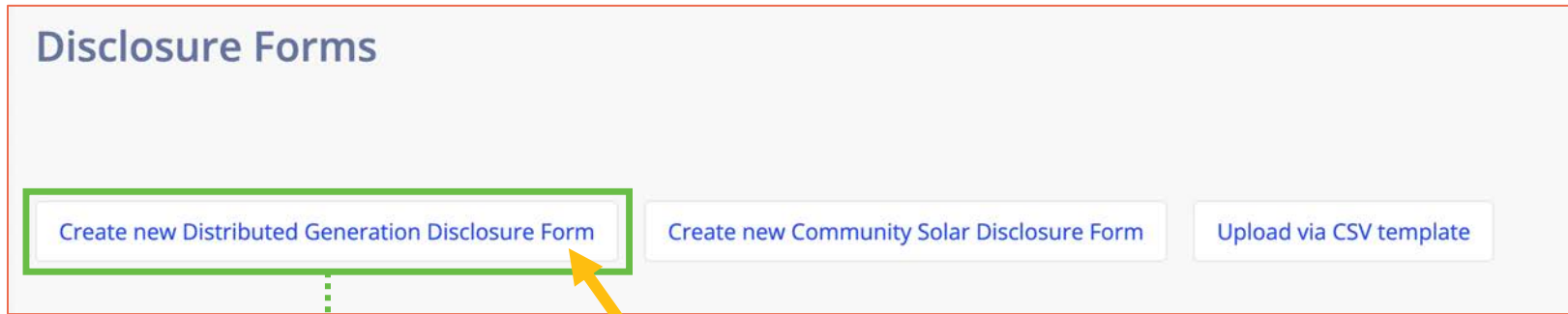
Getting started: “Disclosure Forms” menu

Step 5: After you select the “View” 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: “Create new” button

Step 6: From your Disclosure Forms dashboard, select the “Create new Distributed Generation Disclosure Form button.” The portal will take you to a webpage for the new form.



New Distributed Generation Disclosure Form

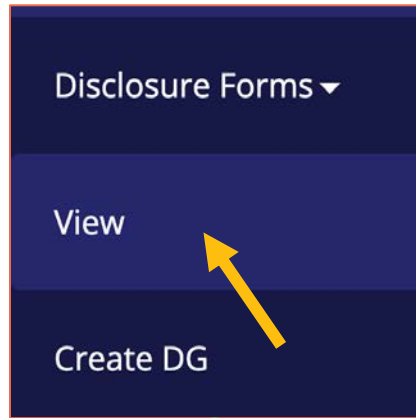
If any of the selections below do not align with this project's model, please contact the Program Administrator.

Form ID 457875	Vendor *
Form type *	Vendor ID for this form: 1091

If the Vendor ID on the new form webpage does not match your intended AV, please return to step 4 (“Create DG”) and make sure that you select your intended AV in the pop-up.


Getting started: Resume an incomplete DG DF

If you started creating a DF earlier and want to pick it up again, log in and follow these steps.



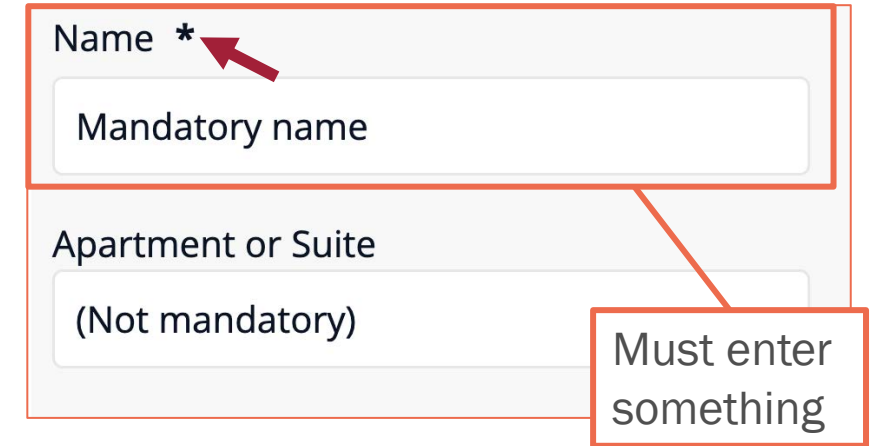
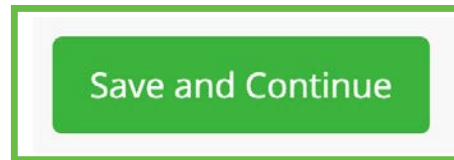
Step 1: Navigate to the Disclosure Forms > **View** task. When prompted, select the Vendor ID/Company Name with the incomplete DF and then select the “*Select Vendor*” button.

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 <input type="text"/> 									
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

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



Customer Contact Information

Revisit Complete

Starting a new DG DF (Section 0)

The portal will create a new form and assign it a unique Form ID, as shown at the top of the new webpage.

New Distributed Generation Disclosure Form

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

Form ID 457761

Vendor *

Step 1: Confirm your Vendor ID. Confirm that the number at the top of this section matches the AV for whom you're preparing the DF. If you need to change the AV, return to "Create DG" in the sidebar menu and make sure that you select your intended AV in the pop-up.

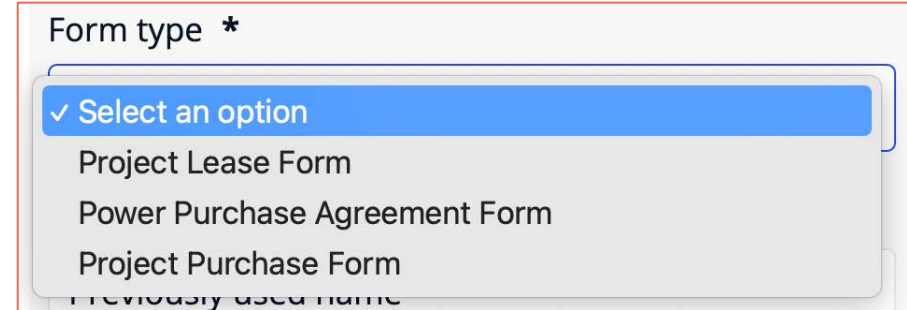
Vendor *

Vendor ID for this form: 1091

Some portal participants have multiple sub-companies and may need to change the active AV before filling out the Disclosure Form.

Starting a new DG DF (Section 0)

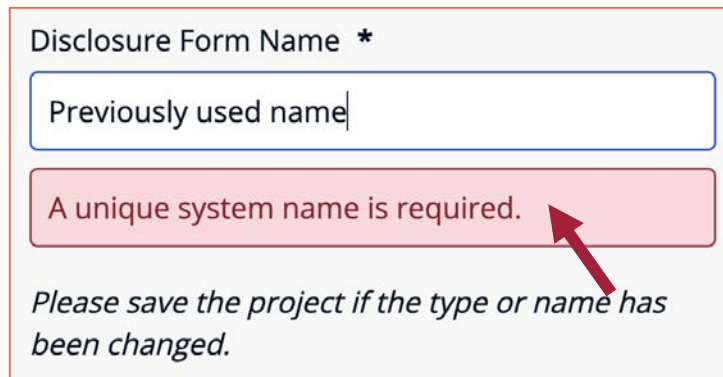
Step 2: Form Type. Use the dropdown to select the form that matches the project financing structure.



Form type *

- ✓ Select an option
- Project Lease Form
- Power Purchase Agreement Form
- Project Purchase Form
- Previously used name

Step 3: Disclosure Form Name. Enter a uniquely identifying name for the DF. You'll use this name to identify your DF in the future, so choose a name that makes sense to you.



Disclosure Form Name *

Previously used name

A unique system name is required.

Please save the project if the type or name has been changed.

The portal won't let you choose a name that's already been used. If you get this error message, try a different name.

Starting a new DG DF (Section 0)

Step 4: *Spanish PDF.* Check the box if you want to generate the DF PDF in Spanish. (The default language is English.)

Export PDF in Spanish?

Note: You can return to this top section to change the type of DF at any time before you “*Submit and Download*” the form. Make sure that you select the “*Save and Continue*” button after changing your selection. The portal will save any relevant inputs and transfer them to the new form when possible. You’ll want to review all sections for any new empty fields.

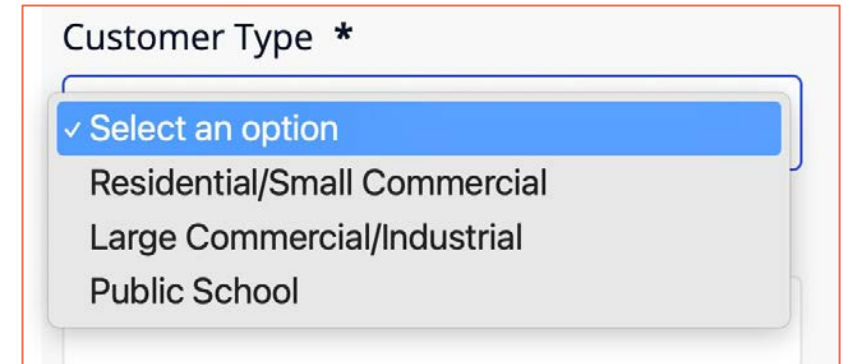
Step 5: Select the “*Save and Continue*” button to move to the next section.



Customer Contact Information (Section 1)

Customer Contact Information (Section 1)

Step 1: *Customer type.* (New question) Use the dropdown to select the load type/customer class.

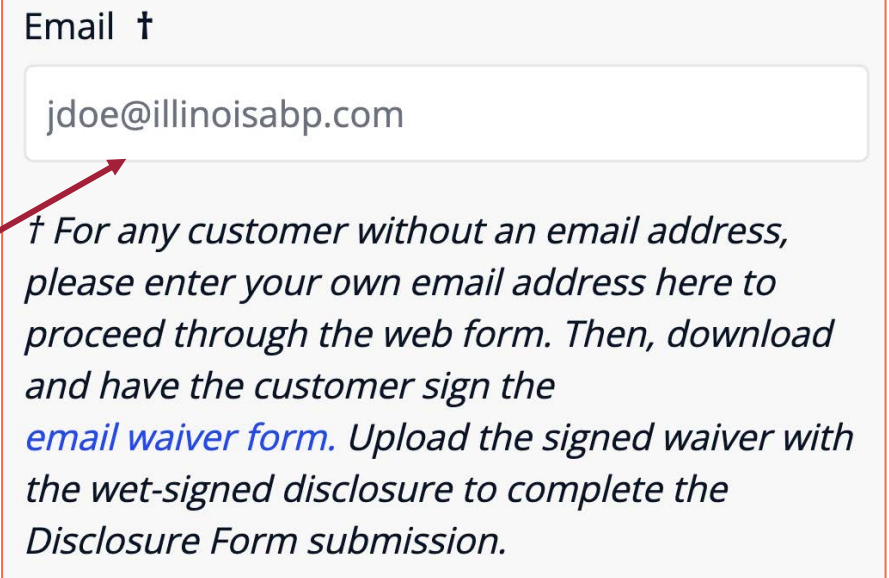


Customer Type *

- ✓ Select an option
- Residential/Small Commercial
- Large Commercial/Industrial
- Public School

Step 2: *Customer's address.* Enter the customer's installation address, phone number, and email address in the input fields.

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



Email †

jdoe@illinoisabp.com

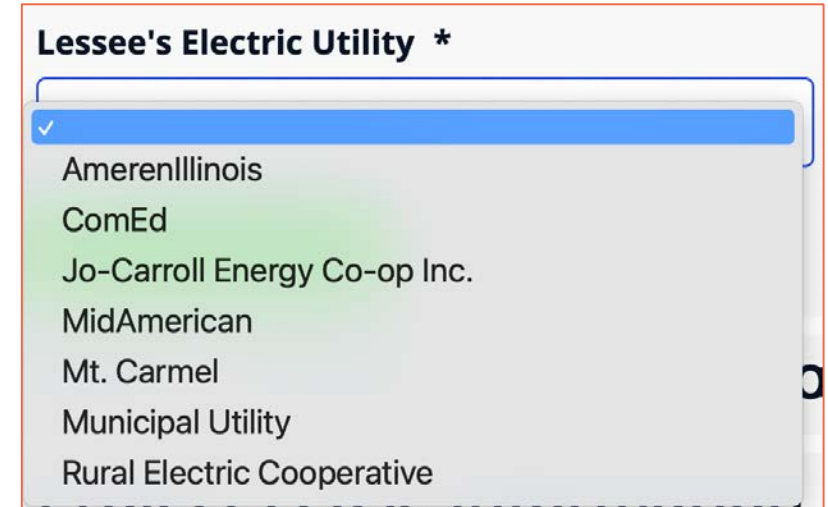
† For any customer without an email address, please enter your own email address here to proceed through the web form. Then, download and have the customer sign the [email waiver form](#). Upload the signed waiver with the wet-signed disclosure to complete the Disclosure Form submission.

Customer Contact Information (Section 1)

Step 3A: *Lessee's Electric Utility.* Use the dropdown box to select the customer's electric utility company.

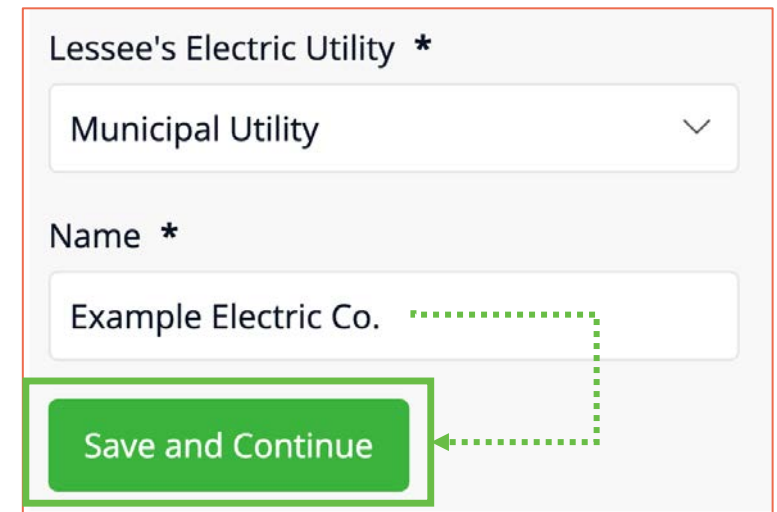
Step 3B: If you select "Municipal Utility" or "Rural Electric Cooperative," the portal will prompt you to type the name of the utility or co-op in a new field.

Step 4: Select the "*Save and Continue*" button to move to the next section.



Lessee's Electric Utility *

- ✓ AmerenIllinois
- ComEd
- Jo-Carroll Energy Co-op Inc.
- MidAmerican
- Mt. Carmel
- Municipal Utility
- Rural Electric Cooperative



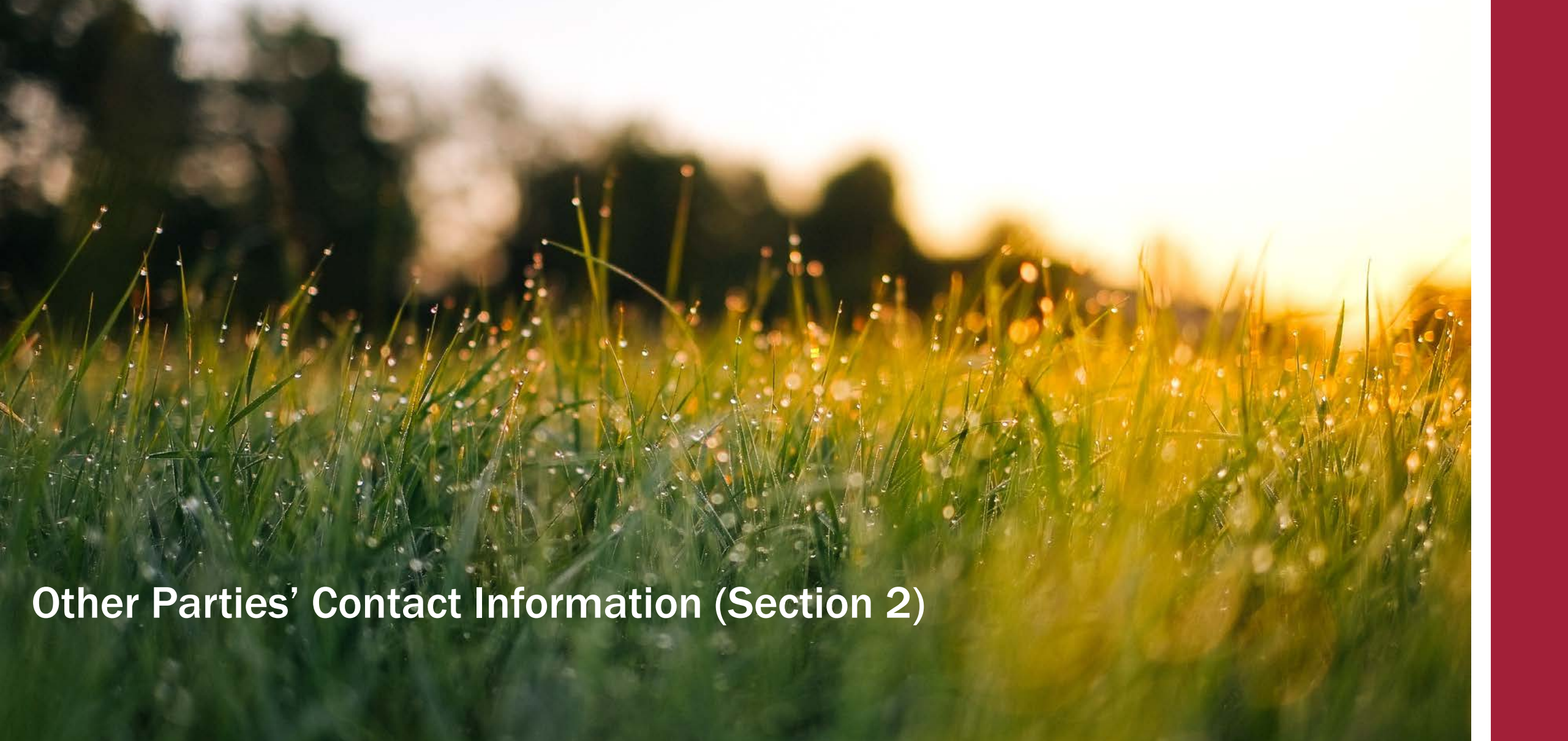
Lessee's Electric Utility *

Municipal Utility

Name *

Example Electric Co.

Save and Continue



Other Parties' Contact Information (Section 2)

Other Parties' Contact Information (Section 2)

Step 1: Lessor's address. Select the “Use Approved Vendor Contact Information” button to have the portal automatically fill your AV contact information. Otherwise, enter the contact information in the labeled input fields.

- If the AV or lessor does not have a website, you can type “none”.

Step 2: Project Installer. Use the dropdown box to state whether the installer is already known (Yes or No). The section will expand based on your choice.

- If **Yes:** Select the “Use Approved Vendor Contact Information” shortcut button to auto-fill your AV contact information. Otherwise, enter the information manually.
- If **No:** Manually enter the names of your three potential installers.

Project Lessor

Use Approved Vendor Contact Information

Project Installer

Is the project installer known at this time? *

✓ Select an option

Yes

No

Installer

Use Approved Vendor Contact Information



Project Lease Information (Section 3)

Project Lease Information (Section 3)

This section covers the project cost and payment amounts/due dates.

Step 1: *Estimated lease payment total.* Enter the total lease payment amount as a number with two decimal places (omit commas and \$ signs).

Step 2: *Lease payment frequency.* This describes how often the customer needs to make a payment. You can enter any phrase, such as “monthly,” “quarterly,” “every 2 months,” etc.

Total amount of all lease payments over the course of the lease contract. Do not include any down payment or other fees: (\$) *

00.00

Frequency of lease payments: *

Ex: Monthly

Project Lease Information (Section 3)

Step 3: *Term of lease.* The lease term (length) is in years and months. Enter both as whole numbers (example: 10 years and 2 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 2 years and 6 months.

Step 4: *Total number of lease payments.* Enter the total number of payments as a whole number (example: 120).

Term of lease. Please enter the entire contract duration in years and the remainder in months. *

years and

months

Total number of payments over the term of the lease contract *

Project Lease Information (Section 3)

Step 5: *Deposit or down payment.* Enter the amount as a number with two decimal places (omit commas and \$ signs).

Deposit, down payment, or initial/upfront amount owed at lease signing (\$) *

00.00

Step 6: *First payment and final payment.* Enter the first and final lease payment amounts as numbers with two decimal places (omit commas and \$ signs). You can enter the first and final payment due dates as phrases (like the examples), or as dates (e.g., “3/1/2023”).

First Lease Payment (\$) *

00.00

When the first payment is due *

Ex: 30 days after project interconnection

Final Lease Payment (\$) *

00.00

When the final payment is due *

Ex: 20 years after the first payment

Project Lease Information (Section 3)

Step 7: Escalation rate. If the payment amount will increase every year, enter the escalation rate as a number without the % symbol. For example, if the increase is 2.5%, enter “2.5”. If the amount will not increase, enter “0”.

Annual escalation rate % *

Step 8: Total project payments. The portal will calculate this automatically. Select “Save and Continue” to continue to the next section.

Total project payments (\$) *



Example: Amounts from Step 1 + Step 5 = calculated amount in Step 8

<p>Total amount of all lease payments over the course of the lease contract. Do not include any down payment or other fees: (\$) *</p> <input type="text" value="9000.00"/>	+	<p>Deposit, down payment, or initial/upfront amount owed at lease signing (\$) *</p> <input type="text" value="1000.00"/>	=	<p>Total project payments (\$) *</p> <input type="text" value="10000.00"/>
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Fees and Total Cost (Section 4)

Fees and Total Cost (Section 4)

Step 1: Fees that will apply. Select the  button to add a fee item. Select the  button to delete a fee item. The portal will automatically sum and add these fees to the total project cost. Move to the next item when you are done entering fees.

Fees that will apply
*List all fees associated with the project that are **known to apply** at this time (for example, interconnection fees, maintenance fees, document preparation fees, etc.).*

Fee Name	Amount (\$)	When It's Due	Number of Payments	Total Amount	
<input type="text" value="Ex: Maintene"/>	<input type="text" value="00.00"/>	<input type="text" value="Ex: Monthly over syste"/>	<input type="text" value="Number of P,"/>	<input type="text" value="Total Amount"/>	

Free text entry



Number (omit commas and \$)

Enter a whole number

Auto-calculated from amount x number of payments

Fees and Total Cost (Section 4)

Example: We added two Example Fees. The portal calculates the total amount of each fee in the right column, then adds those totals to the ongoing total project cost from Section 3.

Fee Name	Amount (\$)	When It's Due	Number of Payments	Total Amount	
Example fee	100.00	Date of energization	1	100.00	
Example 2	10.00	Monthly after energizæ	8	80.00	



The total cost to be paid, including any installation fees, document preparation fees, service fees, or other fees: *

10180.00

Calculated automatically from amount x number of payments



The fees are then added to the total project cost from Section 3, Step 8.

Fees and Total Cost (Section 4)

Step 2: Fees that may apply. Select the  button to add a fee item. Select the  button to delete a fee item. These fees will not be automatically added to the total project cost. Select “Save and Continue” when you are done entering fees.

Other fees that may apply

List all fees associated with the project that **may apply** and the applicable customer conditions that would warranty the fees (for example, late payment fees, early termination fees, etc.)

Fee Name	Amount (\$)	When Applicable	
<input type="text" value="Ex: Late payment fee"/>	<input type="text"/>	<input type="text" value="Ex: Payment more than 30 days"/>	

Free text entry

Free text entry:
Include all symbols (\$, .) for flat fee dollar amounts. Example: \$1,100.50
Text descriptions such as "Accrues at 5% annually" are also allowed.



Illinois Shines Incentive Payment (Section 5)

Illinois Shines Incentive Payment (Section 5)

Step 1: *Expected REC value.* Enter a number with two decimal places (omit commas and \$ signs).

Payment amount can be calculated using the [REC Payments Calculator](#) tool.

Step 2A: *Lease contingency.* Use the dropdown to select “Yes” or “No”.

Step 2B: *Pricing terms change.* If the answer to the question in Step 2A is “No,” a follow-up question appears. Use the dropdown to select “Yes” or “No.”

The expected value of the REC incentive payment(s) that will be received by the Approved Vendor for this project is (\$): *

00.00

Is the lease contingent upon selection for the Adjustable Block Program incentive? *

✓ Select an option

Yes

No

Will the pricing terms change if the project is not selected for the Adjustable Block Program Incentive? *

✓ Select an option

Yes


No



Project Installation (Section 6)

Project Installation (Section 6)


Step 1: Installation start date. Enter a whole number in the first column or a date into the second column. (You can only choose one.)

The estimated start date of project installation will be days from the date the contract is signed. **OR** Alternatively, the estimated start date will be 

Month

Day

Year




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

If you're entering a date in the second column, you can 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.

Project Installation (Section 6)

Step 2: *Installation completion date.* Enter a whole number in the first column or a date into the second column. (You can only choose one.)

The estimated completion date of project installation will be	OR	Alternatively, the estimated completion date will be
<input type="text" value="0"/> days from the date the contract is signed.		<input type="text" value="yyyy-MM-dd"/> 

Step 3: *Date of mechanic's lien waiver.* Enter the estimated date as free text. You can enter a description or an actual date.

What is the estimated date for the lessor to furnish a mechanic's lien waiver? *

Project Installation (Section 6)

Step 4: *Interconnection Application.* Use the dropdown to select who will need to submit the application.

Step 5: *UCC filing statement.* Use the dropdown to select 'Yes' or 'No'.

Party responsible for submitting a project interconnection application to the utility? *

✓ Select an option

Approved Vendor

Installer

Lessor

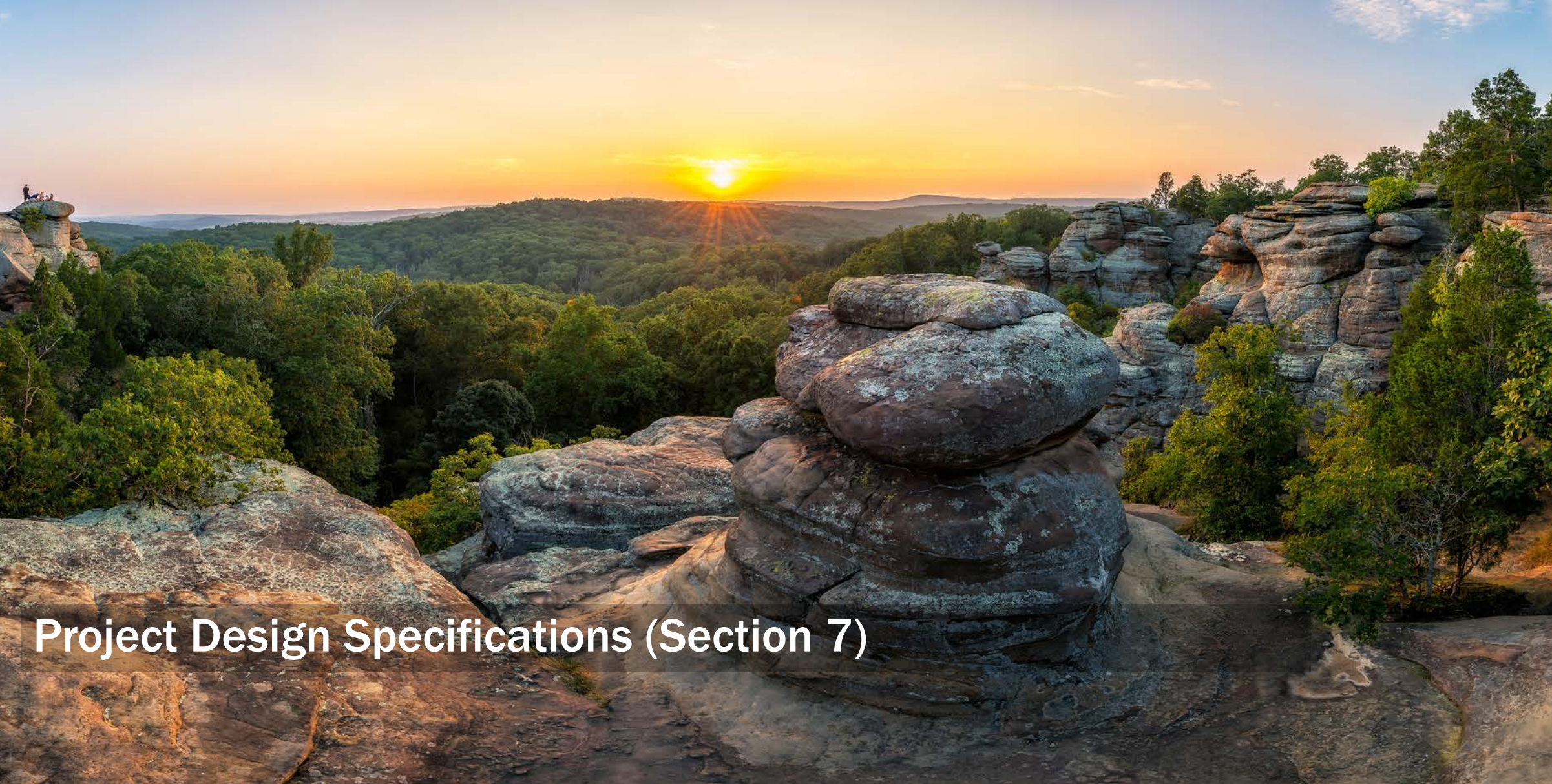
Customer

Does the lessor intend to file a Uniform Commercial Code-1 filing statement? *

✓ Select an option

Yes

No



Project Design Specifications (Section 7)

Project Design Specifications (Section 7)

Step 1: Project size. Enter numbers (up to two decimal places) for the DC and AC kW project sizes.

Project Size (DC kW): *	Project Size (AC kW): *
<input type="text" value="00.00"/>	<input type="text" value="00.00"/>

Step 2: Expected project life. Enter a whole number for the number of years the project is expected to be active.

Expected life of the project (years): *

Step 3: Mounting location. Use the dropdown to select “Roof-mounted” or “Ground-mounted”.

Mounting location: *

- ✓ Select an option
- Roof-mounted
- Ground-mounted

Project Design Specifications (Section 7)

Step 4: *Gross annual production.* Enter a number in kWh with up to two decimal places.

Estimated gross annual electricity production in kilowatt-hours from the project in the first year (based on project design and environmental factors): *

00.00

Step 5: *15 year capacity factor.* (New) The portal automatically calculates this based on the ratio of the estimated production over 15 years (with degradation factor of 0.05%) and project size in AC kW. (*First year kWh/AC size kW/8760*0.96574*)

Example:

Estimated gross annual electricity production in kilowatt-hours from the project in the first year (based on project design and environmental factors): *

7178.00

Project Size (AC kW): *

5.20



15 Year Capacity Factor (%): *

15.22

Project Design Specifications (Section 7)

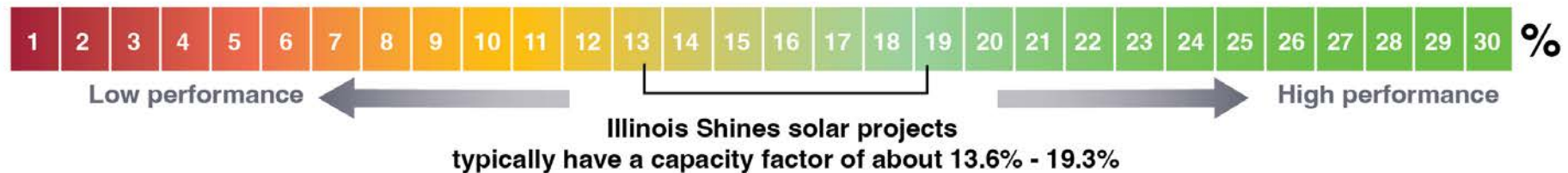
Step 6: *Project performance explanation.* (Optional)

Describe how you arrived at the estimated annual production (for example, the model or software you used) and any factors that affected the calculation (for example, orientation and shading).

Project performance explanation:

Ex: System performance is based on PVWatts modeling for a south-facing 5kW system. Partial shading in the afternoon due to a tree on the property.

This is particularly recommended if the estimated capacity factor is outside of the typical range for Illinois Shines projects:





Net Metering & Smart Inverter/Distributed Generation Rebate (Section 8)

Net Metering & Smart Inverter/DG Rebate (Section 8)

This section will only appear if your customer's utility is ComEd or Ameren.

Step 1: Rebate application intent. Use the dropdown to select "Yes" or "No." If you select "Yes," additional questions will appear.

Step 2: Rebate recipient. Use the dropdown to select a party.

Step 3: Rebate amount. Enter the amount as a number with two decimal places (omit commas and \$ signs).

The screenshot shows a three-step form process. Step 1 is a dropdown menu with 'Yes' selected. Step 2 is a dropdown menu with 'Approved Vendor' selected. Step 3 is a text input field containing '00.00'. Dashed green arrows indicate the flow from Step 1 to Step 2, and from Step 2 to Step 3.

For this project, will an application be submitted for the Smart Inverter Rebate (also known as the DG Rebate)? *

Yes

Who keeps the rebate payment? *

✓ Select an option

Approved Vendor

Installer

Lessor

Customer

Rebate amount (\$) *

00.00



Project Operations, Maintenance, Warranties, and Guarantees (Section 9)

Project Operations, Maintenance, Warranties, and Guarantees (Section 9)

Step 1A: *Project maintenance covered in lease?* Use the dropdown to select. If you choose “Included,” additional questions will appear.

Step 1B: *Years included.* Enter a whole number.

Step 1C: *Who’s responsible?* Use the dropdown to select who will be responsible for maintenance.

Is project maintenance (operational upkeep) included as part of the lease? *

✓ Select an option

Included

Not Included

For how many years is it included? *

0

Who is responsible for project maintenance? *

✓ Select an option

Approved Vendor

Installer

Lessor

Project Operations, Maintenance, Warranties, and Guarantees (Section 9)

Step 2A: *Project repair covered in lease?* Use the dropdown to select. If you choose “Included,” additional questions will appear.

Step 2B: *Years included.* Enter a whole number.

Step 2C: *Who’s responsible?* Use the dropdown to select who will be responsible for repairs.

Are project repairs (actions required to fix a malfunctioning system) included as part of the lease? *

✓ Select an option

Included

Not Included

For how many years is it included? *

0

Who is responsible for repairs? *

✓ Select an option

Approved Vendor

Installer

Lessor

Project Operations, Maintenance, Warranties, and Guarantees (Section 9)

Step 3A: *Installation warranty?* Use the dropdown to select. If you choose “Included,” additional questions will appear.

Is the project warranted against issues related to improper installation? *

✓ Select an option

Included

Not Included

Step 3B: *Years included.* Enter a whole number.

For how many years is it included? *

0

Who is responsible for warranties related to improper installation? *

✓ Select an option

Approved Vendor

Installer

Lessor

Step 3C: *Who’s responsible?* Use the dropdown to select who will be improper installation repairs.

Project Operations, Maintenance, Warranties, and Guarantees (Section 9)

Step 4A: *Roof warrantied in lease?* (Only shown if you selected “Roof-mounted” in Section 7.) Use the dropdown to select. If you choose “Included,” additional questions will appear.

Step 4B: *Years included.* Enter a whole number.

Step 4C: *Who’s responsible?* Use the dropdown to select who will be responsible for roof leaks caused by installation.

Is the roof warrantied against leaks from the project installation? *

✓ Select an option

Included

Not Included

For how many years is it included? *

0

Who is responsible for the warranty against roof leaks due to improper installation? *

✓ Select an option

Approved Vendor

Installer


Lessor

Project Operations, Maintenance, Warranties, and Guarantees (Section 9)

Step 5: *Panel manufacturer's warranty?* Use the dropdown to select. If you choose “Yes,” enter the number of years as a whole number.


Step 6: *Inverter manufacturer's warranty?* Use the dropdown to select. If you choose “Yes,” enter the number of years as a whole number.

Do the solar panels come with a manufacturer's warranty? *


Yes 

For how many years is it included? *

0




Does the inverter come with a manufacturer's warranty? *

Yes 

For how many years is it included? *

0



Project Operations, Maintenance, Warranties, and Guarantees (Section 9)

Step 7: *Project guarantee?* (Optional) Free text entry – see the helper text for an example of what details are required. If left blank, the Disclosure Form will auto-fill with "No guarantee."

Is the lessor providing a project guarantee? If so, please provide details below:

Ex: Customer's contract includes a guaranteed production of 7,500kWh/year. If production falls short in a calendar year, the customer will be credited at the utility rate (\$) for the shortfall in production (kWh).

Step 8: *Insurance against loss/damage?* Use the dropdown to select. If you choose "Included," a follow-up question will appear. Enter the details (exceptions, limits, etc.) as free text.

Will the lessor insure for loss or damage to the project?

*

✓ Select an option

Included

Not Included

Provide details of insurance coverage, including limitations of coverage. *

Exceptions



Early Termination or Completion of Contract (Section 10)

Early Termination or Completion of Contract (Section 10)

Step 1A: *Fee for early termination?* Use the dropdown to select. If you choose “Yes,” follow up questions will appear.

Step 1B: *Fee amount or calculation.* (Only one required) For a fixed fee, enter the amount as a number with two decimal places (omit commas and \$ signs). For a calculated fee, enter the method as free text.

Will the lessor impose a fee or penalty for early termination of the lease by the lessee prior to the conclusion of the contract term? *

Yes



Amount of Fee/Penalty (\$):

00.00

OR Will be calculated as follows:

Ex: 10% of total project cost

Early Termination or Completion of Contract (Section 10)

Step 2: *End of lease options.* Use the dropdowns to select “Yes” or “No” for each option.

Will the lessor return the site to its original condition upon the removal of the system? *

✓ Select an option

Yes

No

Will the lessor remove the solar project at the conclusion of the term of the system lease? *

✓ Select an option

Yes

No

Will the lessor offer the customer the option to renew after the initial term of the system lease? *

✓ Select an option

Yes

No

Will the lessor offer the customer the option to own and retain the system at the conclusion of the term of the system lease? *

✓ Select an option

Yes

No



Additional Terms and Disclosures (Section 11)

Additional Terms and Disclosures (Section 11)

Step 1: Transfer to purchaser. Use the dropdown(s) to select “Yes” or “No”. Different questions will appear depending on your answer.

If you move

If the home or business where the solar project is located is sold, can the customer transfer the system lease obligations to the purchaser(s) of the home or business? *

✓ Select an option

Yes

No

Requirements for transferring lease obligations: *

(Free text entry)

Is the customer required to purchase the solar project before selling the property where it is located? *

✓ Select an option...

Yes

No

Explain the calculation for the purchase price: *

(Free text entry)

Additional Terms and Disclosures (Section 11)

Step 2: Additional Details. (Optional) Free text entry – add details about any section or item in the disclosure form, or important additions about the proposed project, as desired.

Additional details or explanatory information

Please provide any other information related to the project:

Nothing listed shall alter, amend, repeal, or supersede the disclosure requirements contained in this form.



Submit and Download (Section 12)

Submit and Download (Section 12)

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.

Submit and Download In Progress

Please review all information you've entered before hitting submit. Once you click on Submit, you will be unable to make any changes to this form.

After submitting, you will be able to access this form from your dashboard by searching for Form ID **#492501**

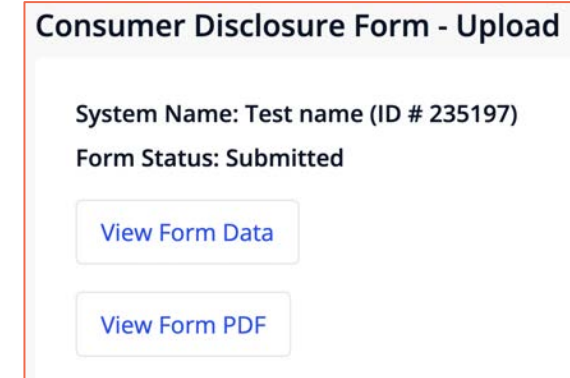
After downloading the form, you must have it signed by the Customer and uploaded or sent to the customer for an electronic signature.

Submit and Download

Submit and Download (Section 12)

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.



Consumer Disclosure Form - Upload

System Name: Test name (ID # 235197)
Form Status: Submitted

[View Form Data](#)

[View Form PDF](#)

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.



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](#)

Submit and Download (Section 12)

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.

View Your Distributed Generation Disclosure Form

Form ID 492501

Form type *

Project Lease Form

Project Name *

Project name

Please save the project if the type or name has been changed.

Export PDF in Spanish?



Vendor *

Vendor ID for this form: 888

Customer Contact Information

Complete

Please enter the installation address of the project.

Lessee

Customer Type *

Name *

Apartment or Suite

State *

Phone *

Lessee's Electric Utility *

Street *

City *

ZIP code *

Email †

† 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.

Other Parties' Contact Information

Complete

Project Lessor

Legal Name *

Vendor Name

Name Used for Marketing (if different)

Marketing name

Street *

5636 Illinois St

Apartment or Suite

Suite 456

City *

Washington

State *

DC

ZIP code *

20015

Phone *

345-345-3456

Email *

name@company.com

Project Installer

Is the project installer known at this time? *

Yes

If the installer is not known, please provide three potential installers.

Installer

Legal Name *

Installer Name

Street *

5636 Illinois St

City *

Washington

ZIP code *

20015

Email *

name@company.com

Name Used for Marketing (if different)

Marketing name

Apartment or Suite

Suite 456

State *

DC

Phone *

345-345-3456

Project Lease Information

Complete

Total amount of all estimated lease payments over the course of the lease contract. Do not include any down payment or other fees: (\$) *

5460.00

Term of lease. Please enter the entire contract duration in years and the remainder in months. *

4

years and

6

months

Deposit, down payment, or initial/upfront amount owed at lease signing (\$) *

500.00

First Lease Payment (\$) *

180.00

Final Lease Payment (\$) *

200.00

Annual escalation rate % *

1.00

Frequency of lease payments: *

Monthly

Total number of payments over the term of the lease contract *

54

When the first payment is due *

30 days after project interconnection

When the final payment is due *

Last month of contract

Total project payments (\$) *

5960.00

Fees and Total Cost

Complete

Fees that will apply

List all fees associated with the project that are **known to apply** at this time (for example, interconnection fees, maintenance fees, document preparation fees, etc.).

Fee Name	Amount (\$)	When It's Due	Number of Payments	Total Amount
Example Fee	160.00	With first payment	1	160.00

The total cost to be paid, including any installation fees, document preparation fees, service fees, or other fees:

*

6120.00

Other fees that may apply

List all fees associated with the project that **may apply** and the applicable customer conditions that would warranty the fees (for example, late payment fees, early termination fees, etc.)

Fee Name	Amount (\$)	When Applicable
Potential fee	Accrues at 3% annually	Upon example circumstances

Illinois Shines Incentive Payment

Complete

The expected value of the REC incentive payment(s) that will be received by the Approved Vendor for this project is (\$): *

8000.00

Is the lease contingent upon selection for the Adjustable Block Program incentive? *

No

Will the pricing terms change if the project is not selected for the Adjustable Block Program incentive? *

No

Project Installation

Complete

The estimated start date of project installation will be **OR**

days from the date the contract is signed.

Alternatively, the estimated start date will be



The estimated completion date of project installation will be **OR**

days from the date the contract is signed.

Alternatively, the estimated completion date will be



What is the estimated date for the lessor to furnish a mechanic's lien waiver? *

Party responsible for submitting a project interconnection application to the utility? *



Does the lessor intend to file a Uniform Commercial Code-1 filing statement? *



Project Design Specifications

Complete

Project Size (DC kW): *

5.20

Expected life of the project (years): *

10

Estimated gross annual electricity production in kilowatt-hours from the project in the first year (based on project design and environmental factors): *

7178.00

Project performance explanation:

PVWatts modeling for a 5.2 kW south-facing system

Project Size (AC kW): *

5.20

Mounting location: *

Roof-mounted

15 Year Capacity Factor (%): *

15.22

Net Metering & Smart Inverter Rebate

Complete

For this project, will an application be submitted for the Smart Inverter Rebate (also known as the DG Rebate)? *

Yes

Rebate amount (\$) *

1800.00

Who keeps the rebate payment? *

Lessor

This section will only appear if your customer's utility is ComEd or Ameren.

Project Operations, Maintenance, Warranties, and Guarantees

Complete

Is project maintenance (operational upkeep) included as part of the lease? *

Included

For how many years is it included? *

10

Who is responsible for project maintenance? *

Installer

Is the project warrantied against issues related to improper installation? *

Included

For how many years is it included? *

10

Who is responsible for warranties related to improper installation? *

Approved Vendor

Are project repairs (actions required to fix a malfunctioning system) included as part of the lease? *

Included

For how many years is it included? *

10

Who is responsible for repairs? *

Approved Vendor

Is the roof warrantied against leaks from the project installation? *

Included

For how many years is it included? *

10

Who is responsible for the warranty against roof leaks due to improper installation? *

Approved Vendor

Do the solar panels come with a manufacturer's warranty? *

Yes

For how many years is it included? *

10

Is the lessor providing a project guarantee? If so, please provide details below:

Details

Does the inverter come with a manufacturer's warranty? *

Yes

For how many years is it included? *

10

Will the lessor insure for loss or damage to the project? *

Included

Provide details of insurance coverage, including limitations of coverage. *

More details

Early Termination or Completion of Contract

Complete

Will the lessor impose a fee or penalty for early termination of the lease by the lessee prior to the conclusion of the contract term? *

Yes

Amount of Fee/Penalty (\$):

00.00

OR Will be calculated as follows:

Calculation method

Will the lessor return the site to its original condition upon the removal of the system? *

Yes

Will the lessor offer the customer the option to renew after the initial term of the system lease? *

Yes

Will the lessor remove the solar project at the conclusion of the term of the system lease? *

Yes

Will the lessor offer the customer the option to own and retain the system at the conclusion of the term of the system lease? *

Yes

Additional Terms and Disclosures

Complete

If you move

If the home or business where the solar project is located is sold, can the customer transfer the system lease obligations to the purchaser(s) of the home or business? *

No

Is the customer required to purchase the solar project before selling the property where it is located? *

Yes

Additional details or explanatory information

Please provide any other information related to the project:

Nothing listed shall alter, amend, repeal, or supersede the disclosure requirements contained in this form.

No additional details.

Explain the calculation for the purchase price: *

(Free text entry)

About 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

