

# 2023-2024 Distributed Generation Project Purchase 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 Purchase 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](#)

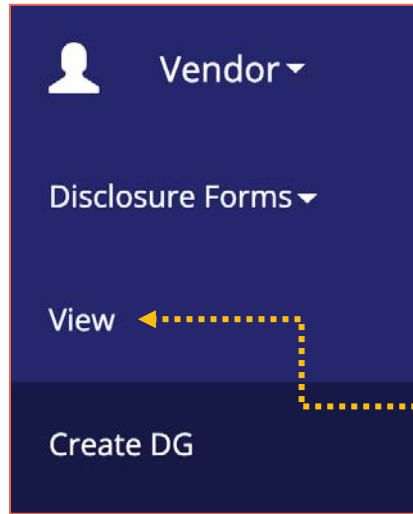
**Step 1:** In your browser, navigate to <https://portal.illinoisabp.com/>

**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](mailto:admin@illinoisabp.com)

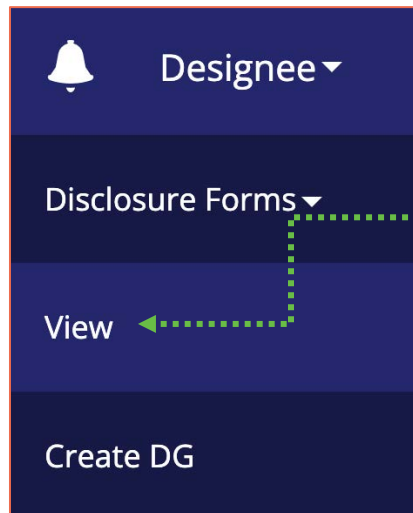
**Step 3:** Select "*Sign In*" to be taken to your Dashboard.

# 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



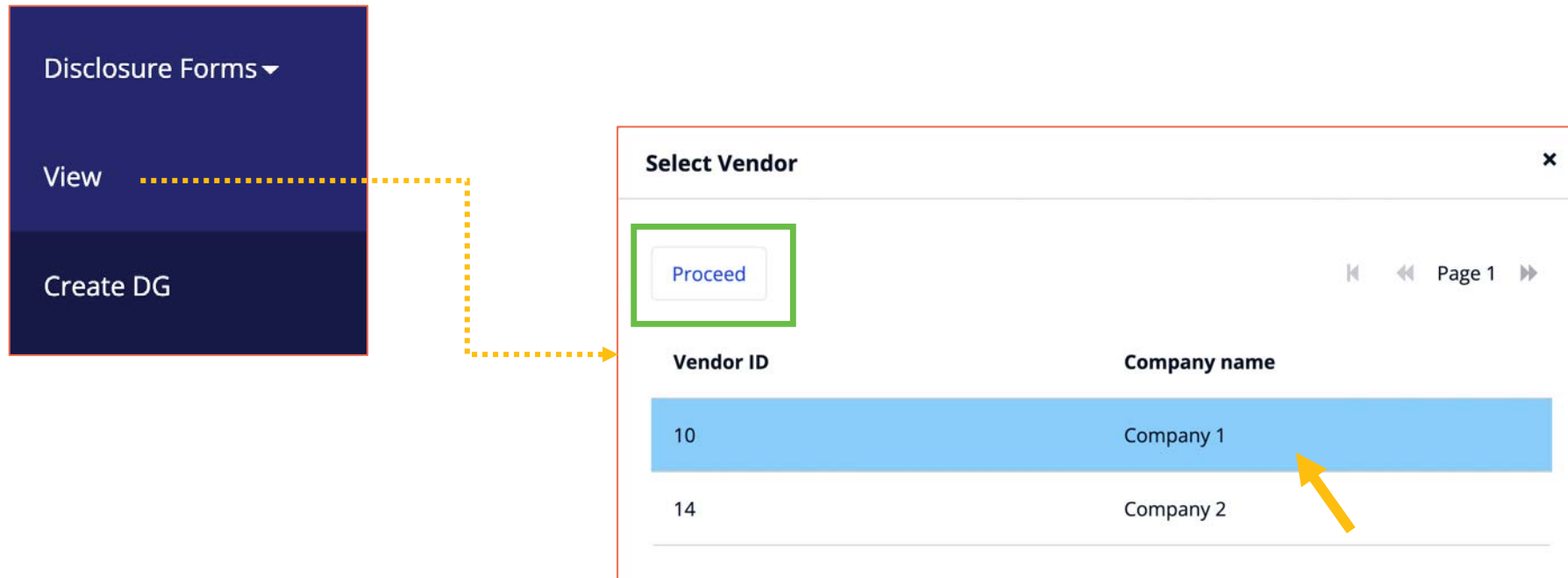
If you're acting as a designee

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.



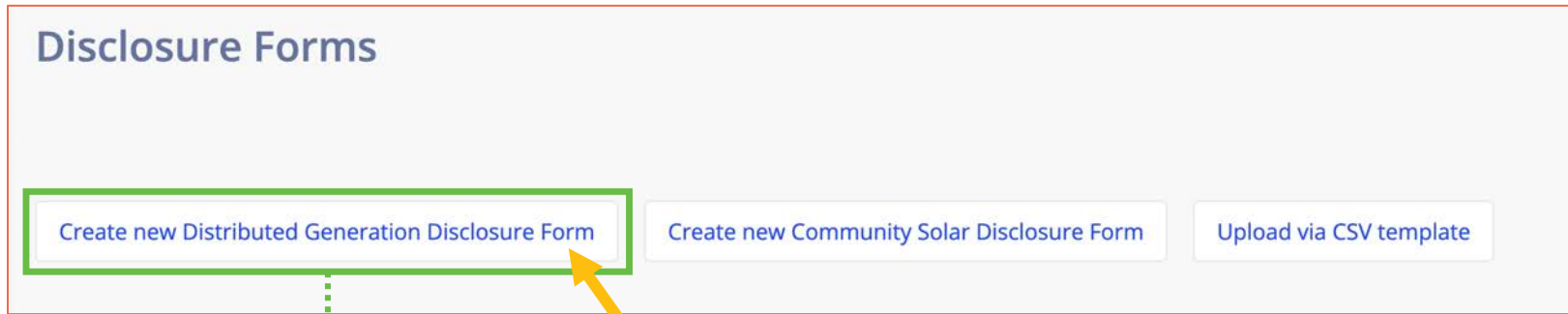
# Getting started: “Disclosure Forms” menu

**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 the 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**

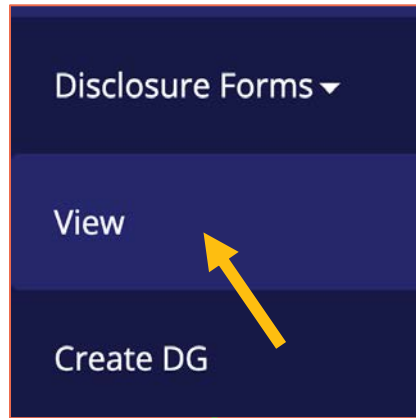
*If any of the selections below do not align with this project's model, please contact the Program Administrator.*

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.



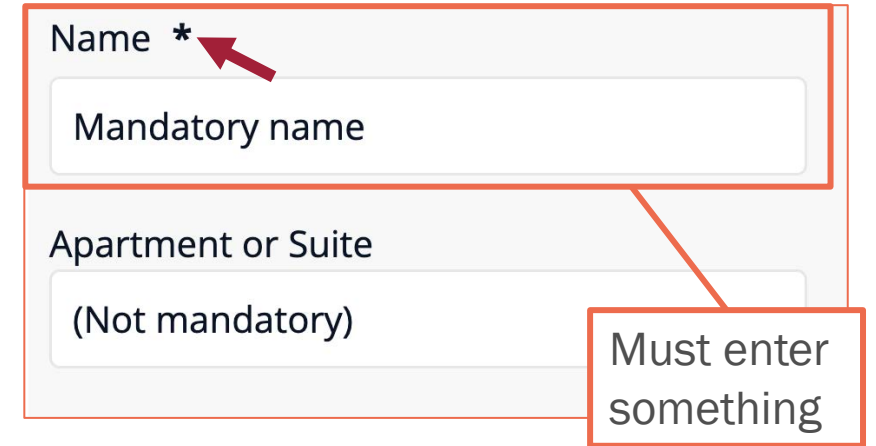
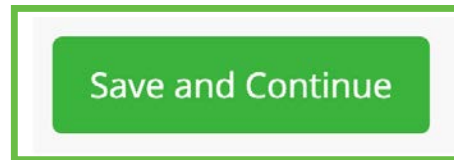
**Step 1:** Navigate to the Disclosure Forms > **View** task. When prompted, select the Vendor ID/Company Name with the incomplete DF and then select the “*Select Vendor*” button.


**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  

# 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.

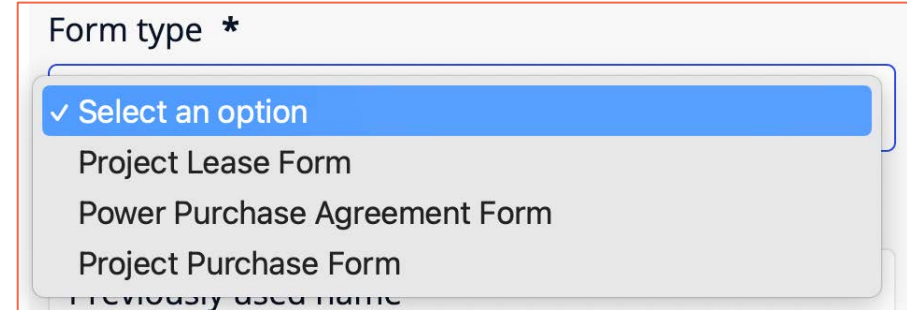
Vendor \*

**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)

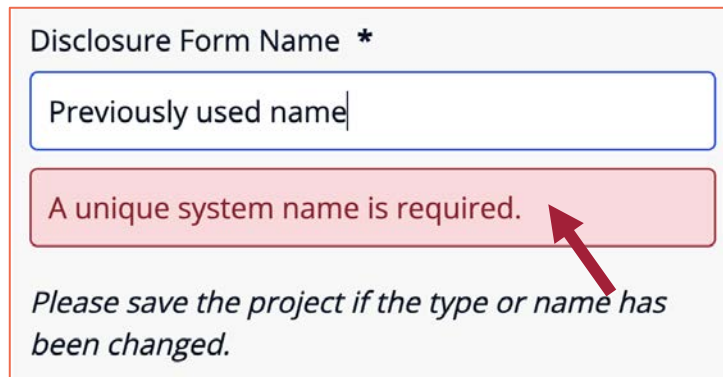
**Step 2: Form Type.** Use the dropdown to select the form that matches the project financing structure.



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.

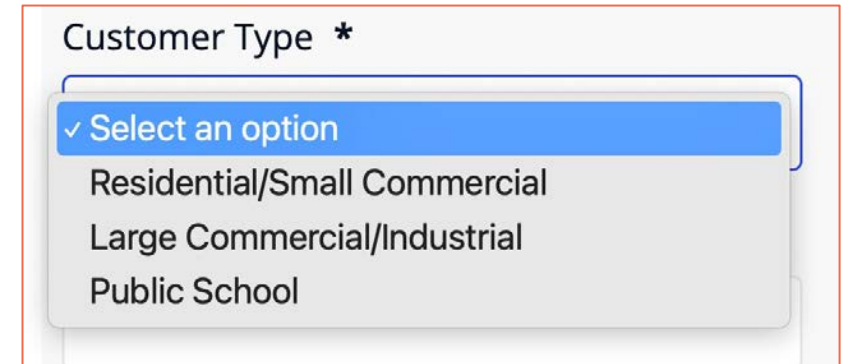


# Customer Contact Information (Section 1)



# Customer Contact Information (Section 1)

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

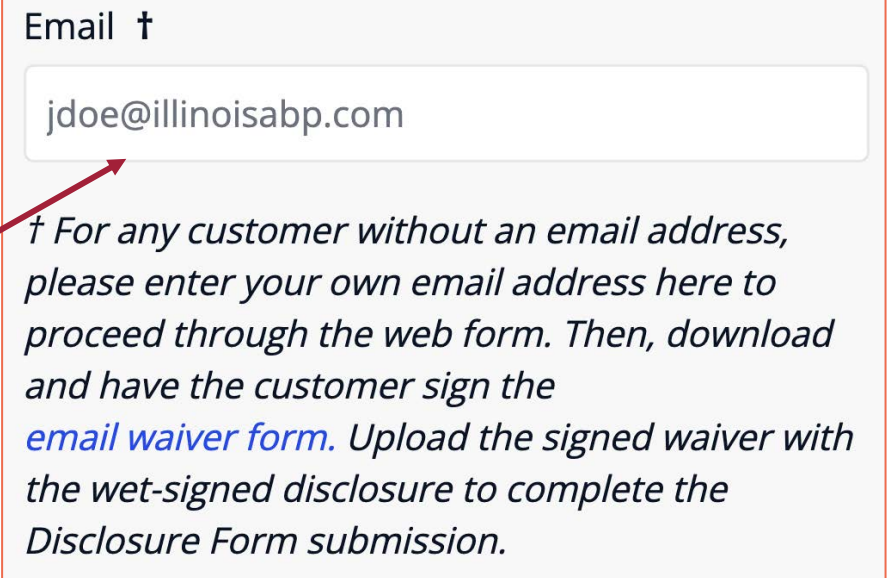


Customer Type \*

- ✓ 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

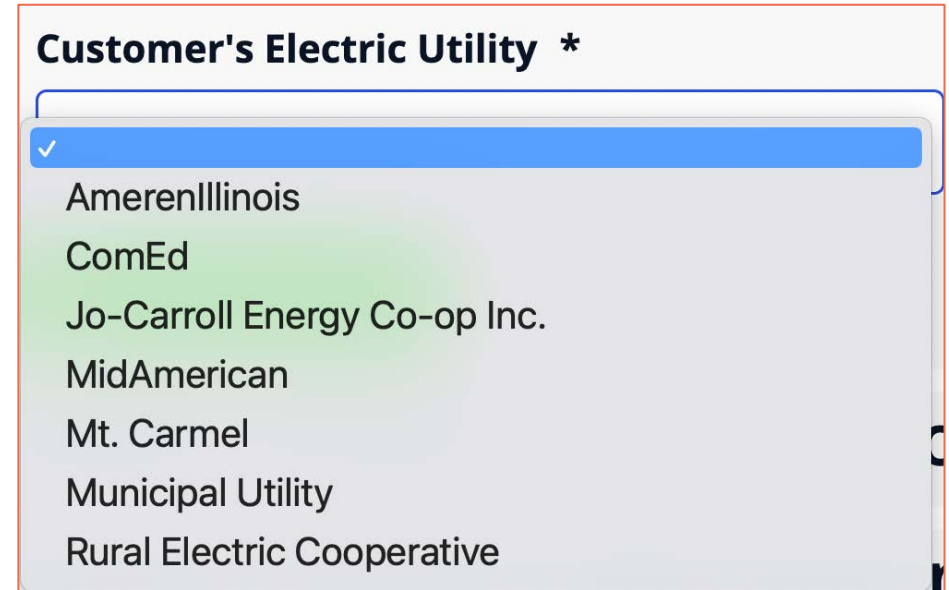
† For any customer without an email address, please enter your own email address here to proceed through the web form. Then, download and have the customer sign the [email waiver form](#). Upload the signed waiver with the wet-signed disclosure to complete the Disclosure Form submission.

# Customer Contact Information (Section 1)

**Step 3A:** *Customer'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.



**Customer's Electric Utility \***

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

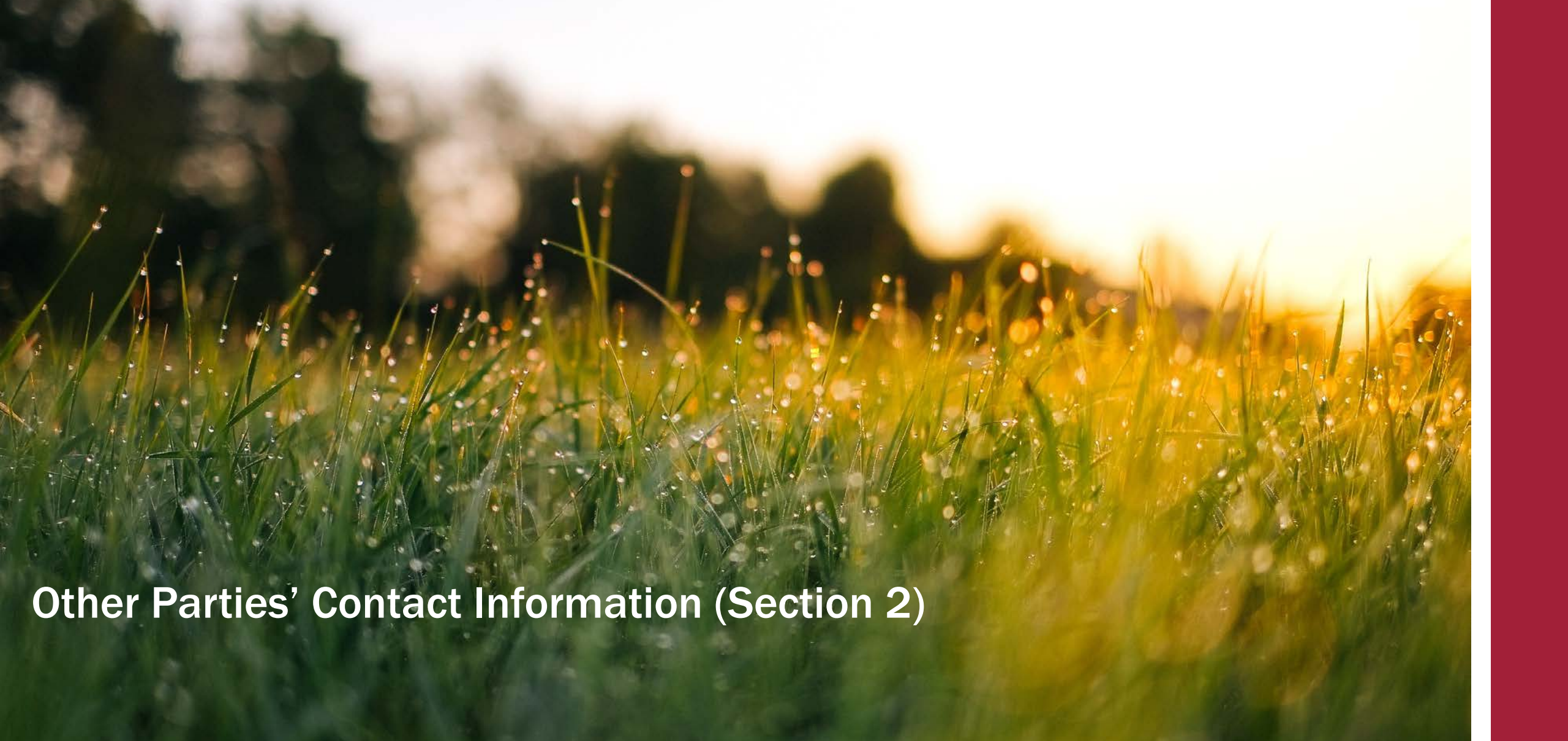


Customer's Electric Utility \*

Rural Electric Cooperative

Name \*

Example Co-op



# Other Parties' Contact Information (Section 2)

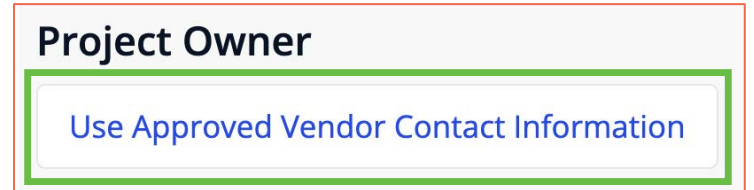
# Other Parties' Contact Information (Section 2)

**Step 1:** *Project owner'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”.

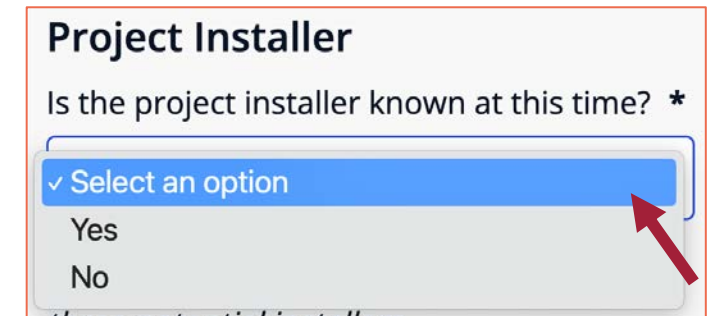
**Step 2:** *Project Installer.* Use the dropdown box to state whether the installer is already known (Yes or No). The section will expand based on your choice.

- 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 Owner**

Use Approved Vendor Contact Information



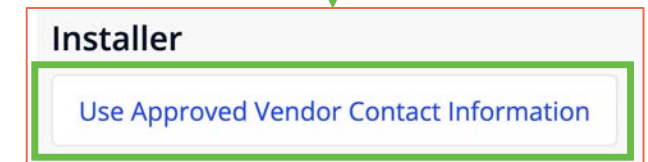
**Project Installer**

Is the project installer known at this time? \*

✓ Select an option

Yes

No



**Installer**

Use Approved Vendor Contact Information



## Project Purchase Information (Section 3)

# Project Purchase Information (Section 3)

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

**Step 1:** *Deposit, first, final, and intermediary payments.* Enter each payment amount as a number with two decimal places (omit commas and \$ signs). Enter 0 if no payment is owed.

Deposit or amount owed to the seller at contract signing (\$) *	The amount owed to seller at the start of project installation (\$) *
<input type="text" value="00.00"/>	<input type="text" value="00.00"/>
The amount of the final payment due to seller (\$) *	The amount of any other intermediary payments for the project (\$) *
<input type="text" value="00.00"/>	<input type="text" value="00.00"/>

# Project Purchase Information (Section 3)

**Step 2: Due dates.** Enter the final and intermediary payment due dates as free text descriptions. Standard dates (mm-dd-yyyy) are also fine.

The final payment is due *	Time any other intermediary payments are due *
Ex: 60 days after project installation	Ex: 30 days after installation

**Step 3: Total estimated project price.** The portal will calculate this automatically. Select “Save and Continue” to continue to the next section.

Project Purchase Price (\$) *
Calculated based on payments

*Example: Sum of amounts from Step 1 = calculated amount in Step 8*

Deposit or amount owed to the seller at contract signing (\$) *		The amount owed to seller at the start of project installation (\$) *		=	Project Purchase Price (\$) *
1000.00	+	0.00			8260.00
The amount of the final payment due to seller (\$) *		The amount of any other intermediary payments for the project (\$) *			
1000.00		6260.00			



## Fees and Total Cost (Section 4)



# Fees and Total Cost (Section 4)



There are **two separate tables** in this section:

- Fees that **will** apply to the project in all circumstances
- Fees that **may** apply, but only if a certain situation happens (e.g., if a payment is late)



Note the difference from last year's disclosure forms, which had sections for:

- The late payment fee
- A non-connection to internet fee
- All other “will” and “may” fees combined in one table

# 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 energizac	8	80.00	



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

8440.00

Calculated automatically from amount x number of payments



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

# 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.

# Fees and Total Cost (Section 4)

**Step 3A: Collateral fee or withholding.** Use the dropdown to select “Yes” or “No.” If you select “Yes,” three additional questions will appear.

Will the Approved Vendor charge a collateral fee or withhold part of the customer's REC incentive payment? \*

*Note: The collateral fee is required of the Approved Vendor to ensure performance under the REC contract.*

Yes

Collateral fee requirement type: \*

✓ Select an option

Charge a fee

Withhold part of the REC payment

Estimated date for return of collateral fee \*

Ex: 30 days after completion of 15 year REC contract

Amount of collateral fee: (\$) \*

00.00

Conditions for return of collateral fee \*

Collateral conditions

**Step 3B: Fee details.** Use the dropdown to select the requirement type (how the fee will be charged). Enter the fee amount as a number with two decimal places (omit commas and \$ signs). Enter the “estimated date” and “conditions” as free text.



## 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 2:** *REC Payment amount passed on to customer.* Enter a number (omit commas and \$ signs). This value should not include project price reductions or withheld collateral.

*Example: If the total REC payment is \$20,000 and from that payment, the AV keeps \$2,000 as a processing fee, and holds \$5,000 as collateral, the amount that should be entered into this field is \$13,000. The \$5,000 would be disclosed under the collateral section. If the value of the REC payment to the customer is passed through as a reduction to overall project costs, the amount that should be entered into this field is \$0.*

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

00.00

Amount of the REC payment that the Approved Vendor will pass on to the customer (\$): \*

00.00

*This field only refers to the amount that will be directly paid to the customer. Do not include amounts withheld as collateral or value indirectly passed through via reduced project price.*

# Illinois Shines Incentive Payment (Section 5)

**Step 3A: Contract contingency.** Use the dropdown to select “Yes” or “No.”

**Step 3B: Pricing terms change.** If the answer to the question in Step 3A is “No,” a follow-up question appears. Use the dropdown to select “Yes” or “No.”

**Step 4: Illinois Shines Application.** Enter a date or description as free text.

Is the installation contract 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

When will Approved Vendor submit an application to the project to Illinois Shines? Please enter a date or condition below. \*

Ex: Within 30 days of contract signing




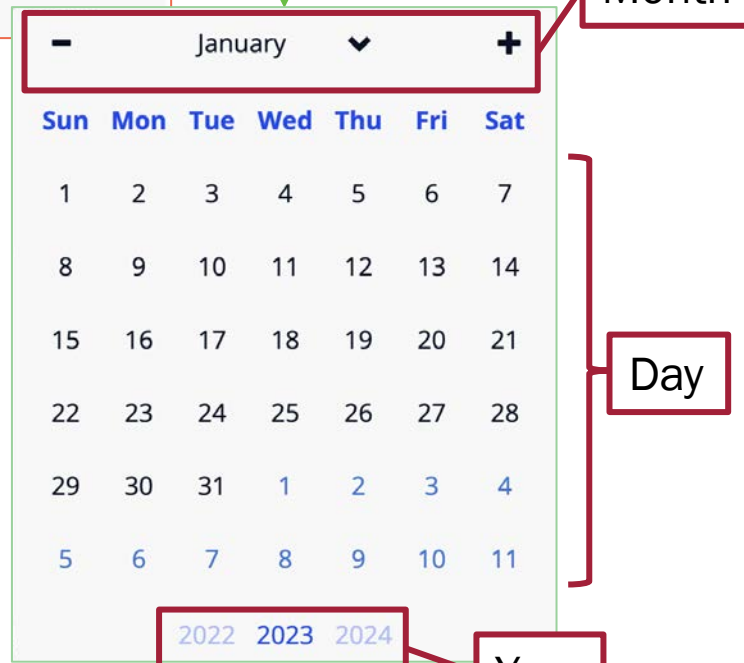


## Project Installation (Section 6)

# 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  




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 project owner 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.

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

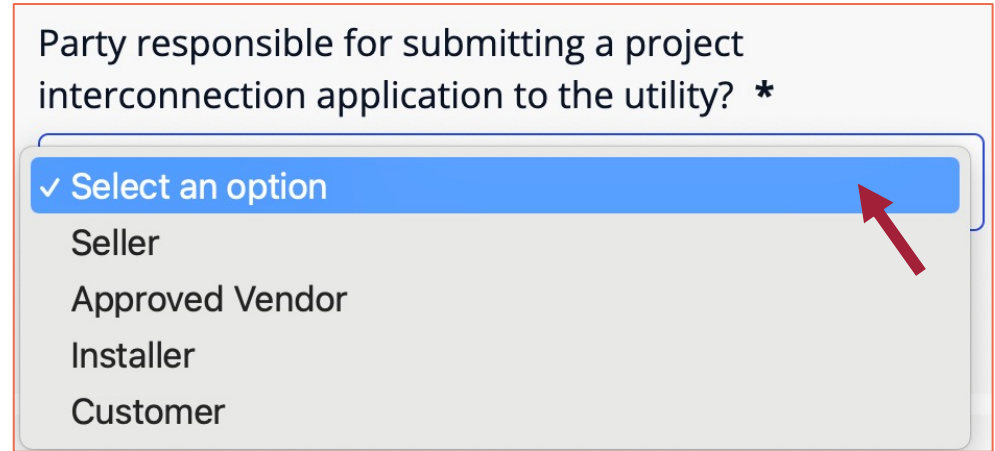
✓ Select an option

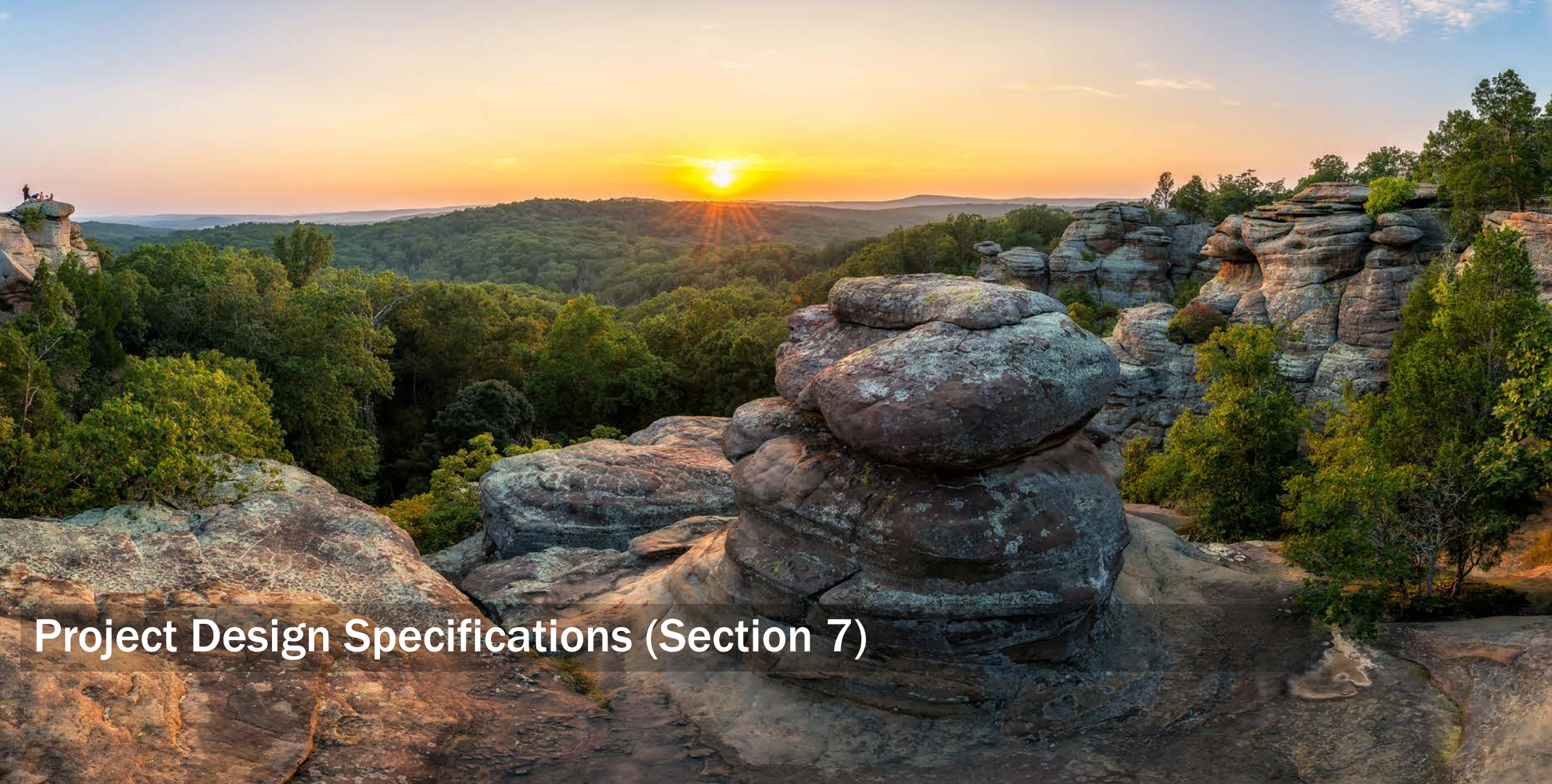
Seller

Approved Vendor

Installer

Customer





## 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)

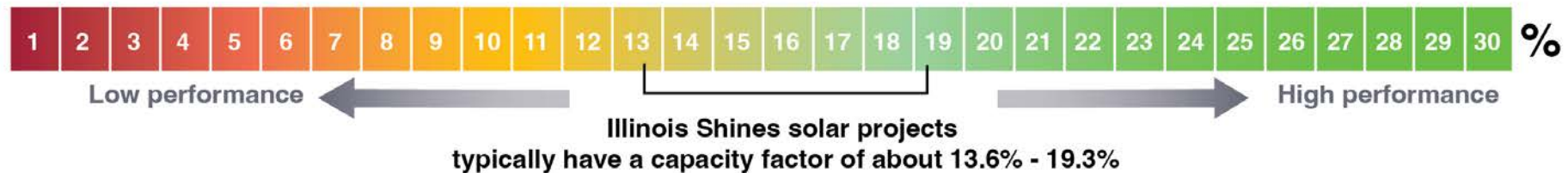
## Step 6: *Project performance explanation.* (Optional)

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:** A question box titled "For this project, will an application be submitted for the Smart Inverter Rebate (also known as the DG Rebate)?" with an asterisk. Below it is a dropdown menu with "Yes" selected. A green dashed arrow points from the dropdown to the next step.
- Step 2:** A question box titled "Who keeps the rebate payment?" with an asterisk. Below it is a dropdown menu with "Select an option" highlighted in blue. The menu is open, showing options: "Seller", "Approved Vendor", "Installer", and "Customer". A green dashed arrow points from the dropdown to the next step.
- Step 3:** A question box titled "Rebate amount (\$)" with an asterisk. Below it is a text input field containing "00.00".



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

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

**Step 1A:** *Project maintenance covered in contract?* 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 purchase contract? \*

✓ Select an option

Included

Not Included

For how many years is it included? \*

0

Who is responsible for repairs? \*

✓ Select an option

Seller

Approved Vendor

Installer

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

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

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

✓ Select an option

Included

Not Included

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

For how many years is it included? \*

0

Who is responsible for repairs? \*

✓ Select an option

Seller

Approved Vendor

Installer

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

# 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.

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

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

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

✓ Select an option

Included

Not Included

For how many years is it included? \*

0

Who is responsible for warranties related to improper installation? \*

✓ Select an option

Seller

Approved Vendor

Installer

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

**Step 4A:** *Roof warrantied in contract?* (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

Seller

Approved Vendor


Installer

# 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 seller 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.

Is insurance included for loss or damage to the project?

\*

✓ Select an option

Included

Not Included

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

Exceptions



# Additional Terms and Disclosures (Section 10)

# Additional Terms and Disclosures (Section 10)

**Step 1:** *Requirements for transfer on move.*

Free text entry – enter details as needed.

**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.

## If you move

Requirements for including the transfer of your solar project as part of a real estate transaction if you sell your home or business: \*

Enter requirements here...

## 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 11)

# Submit and Download (Section 11)

**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

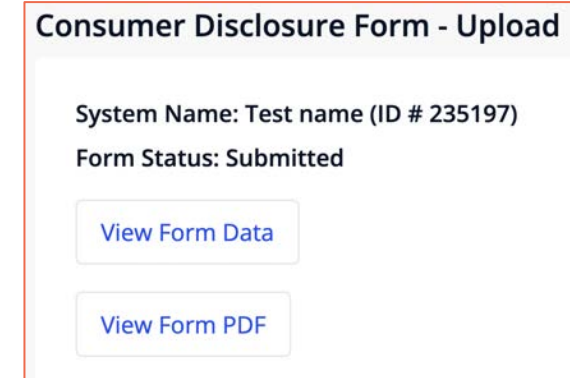
After downloading the form, you must have it signed by the Customer and uploaded or sent to the customer for an electronic signature.

[Submit and Download](#)

# Submit and Download (Section 11)

**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 11)

**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 492521

Form type \*

Project Purchase Form

Project Name \*

Example Purchase 1

*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.

## Customer

Customer Type \*

Name \*

Apartment or Suite

State \*

Phone \*

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.

Customer's Electric Utility \*



## Other Parties' Contact Information

Complete

### Project Seller

Legal Name \*

Example Company

Name Used for Marketing (if different)

Marketing name

Street \*

5636 Illinois Ave

Apartment or Suite

Suite 456

City \*

Washington

State \*

DC

ZIP code \*

20015

Phone \*

123-432-4546

Email \*

name@company.com

## Project Installer

Is the project installer known at this time? \*

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

## Installer

Legal Name \*

Street \*

City \*

ZIP code \*

Email \*

Name Used for Marketing (if different)

Apartment or Suite

State \*

Phone \*

## Project Purchase Information

Complete

Deposit or amount owed to the seller at contract signing (\$) \*

1000.00

The amount of the final payment due to seller (\$) \*

1000.00

The final payment is due \*

60 days after project installation

Project Purchase Price (\$) \*

8260.00

The amount owed to seller at the start of project installation (\$) \*

0.00

The amount of any other intermediary payments for the project (\$) \*

6260.00

Time any other intermediary payments are due \*

At start of construction

## 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, application fees, interconnection fees, maintenance fees, etc.). Do not list any portion of the REC incentive withheld from the customer if that amount has already been accounted for in disclosing the amount of the REC incentive payment passed through to the customer.

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 energization	8	80.00

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

9440.00

### 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
No potential fees. Use the '+' button above to add a fee.		

Will the Approved Vendor charge a collateral fee or withhold part of the customer's REC incentive payment? \*

*Note: The collateral fee is required of the Approved Vendor to ensure performance under the REC contract.*

Yes

Amount of collateral fee: (\$) \*

1000.00

Conditions for return of collateral fee \*

Conditions

Collateral fee requirement type: \*

Charge a fee

Estimated date for return of collateral fee \*

30 days after completion of REC contract

## 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 (\$): \*

4500.00

Is the installation contract 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

Amount of the REC payment that the Approved Vendor will pass on to the customer (\$): \*

0.00

*This field only refers to the amount that will be directly paid to the customer (not the value of a reduced project price -- including but not limited to withheld collateral).*

When will Approved Vendor submit an application to the project to Illinois Shines? Please enter a date or condition below. \*

Within 30 days of contract signing

## 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 seller to furnish a mechanic's lien waiver? \*

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



## 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:

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.

Project Size (AC kW): \*

5.20

Mounting location: \*

Roof-mounted

15 Year Capacity Factor (%): \*

15.22



## Net Metering & Distributed Generation Rebate

Complete

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

Yes

Rebate amount (\$) \*

1200.00

Who keeps the rebate payment? \*

Approved Vendor

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 purchase contract? \*

Not Included

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

Not Included

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

No

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

Details

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

Not Included

Is the roof warranted against leaks from the project installation? \*

Not Included

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

No

Is insurance included for loss or damage to the project? \*

Included

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

Exceptions

## Additional Terms and Disclosures

Complete

### If you move

Requirements for including the transfer of your solar project as part of a real estate transaction if you sell your home or business: \*

Explanation

### Additional details or explanatory information

Please provide any other information related to the project:

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# 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](mailto:admin@illinoisabp.com)

877.783.1820

