

New Disclosure Form Informational Webinar

Presented by Energy Solutions and the
Illinois Power Agency

May 18, 2023



Presenters



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Agenda

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Background of Disclosure Form Updates





Background of Disclosure Form Updates

- **Purpose of Disclosure Forms**
- **Goals for updating Disclosure Forms**
- **Stakeholder feedback process resulting in updated Disclosure Forms**
 - 2022 Long Term-Plan included initial draft Disclosure Forms
 - Comment process and Long-Term Plan litigation
 - Winter 2022/Spring 2023 additional stakeholder feedback process

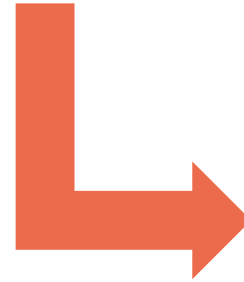


Overview of Disclosure Form Changes – Distributed Generation



Overview of Disclosure Form Changes – Distributed Generation

- Simplified form navigation/organization and auto-calculations
- Discontinuing the over 25kW Disclosure Form
- Ability to export the Disclosure Forms in Spanish

A screenshot of a form with a light gray background, enclosed in a thin red border. The form contains the text "Export PDF in Spanish?" followed by an unchecked checkbox. Below the checkbox is a green button with the text "Save and Continue" in white.

Overview of Disclosure Form Changes – Distributed Generation

- **DG fees section**

- Conditional and non-conditional fees are broken out separately to allow for summation of non-conditional fees with other costs

Fees that will apply	Amount	When Due	# of Payments	Amount
Maintenance Fee	\$100.00	Monthly for the first year	12	\$1,200.00
Delivery Fee	\$500.00	After Installation	1	\$500.00
Pest Barrier Fee	\$2,000.00	15 days before installation	1	\$2,000.00
Additional Fee	\$50.00	Yearly over lifetime of System	25	\$1,250.00

Total amount paid, including purchase price and above fees, for duration of contract

\$54,950

Amount includes \$50,000 purchase price and \$4,950 of non-conditional fees.

Other Fees that May Apply	When Applicable	Amount
Late Payment Fee	If payment is more than 30 days late	\$500.00

Overview of Disclosure Form Changes – Distributed Generation

- Additional of Collateral Requirements and Possible Refund



Collateral Charge and Possible Refund

Your Approved Vendor will charge you a fee as collateral in case your solar project does not generate as many Renewable Energy Credits (RECs) as expected. This collateral may be refunded later.

Amount of collateral	\$1,000.00
Estimated date for return of collateral fee	Collateral date
Conditions for return of collateral fee	Collateral conditions

Total amount paid, including purchase price and above fees, for duration of contract.

\$64,950

A withheld collateral fee will not be included in the total cost of the project, but a “charge as a fee” type will be added to the total cost of the project.

Overview of Disclosure Form Changes – Distributed Generation

- Updates to section on Net Metering and Smart Inverter/DG Rebate

Net Metering and Smart Inverter Rebate

You may be eligible for net metering, which credits your electric bill for excess generation from your solar project. Net metering credits can have a significant impact on the financial benefits of your solar project. **To participate in net metering, an application must be submitted to your electric utility.** For more information on net metering including credit amounts, how credits roll over, and whether credits expire, please see <https://illinoisshines.com/consumer-protection/disclosure-form-resources>.

An Application will be submitted for your project to receive the Smart Inverter Rebate.

Your electric utility will provide an upfront lump-sum payment, but **you may receive a lower net metering rate.** Please see <http://illinoisshines.com/consumer-protection/disclosure-form-resources> for more information.

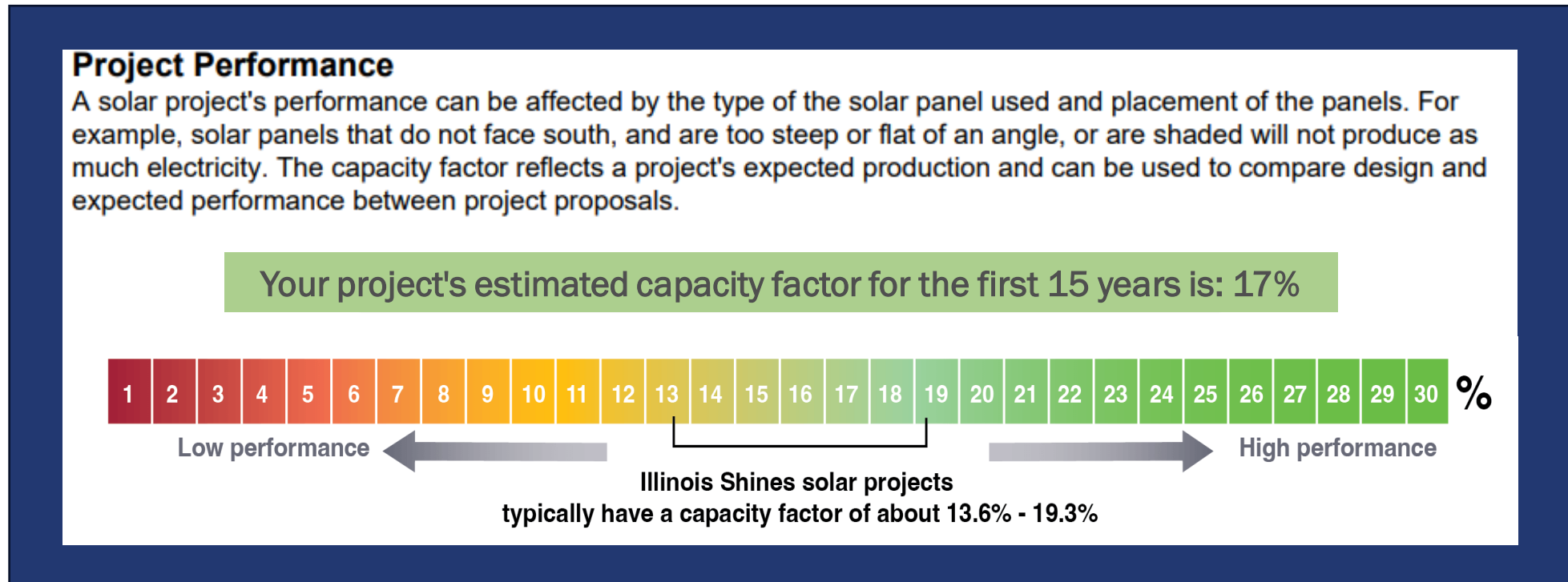
Rebate Amount	\$123,456.98
Who keeps the rebate payment	Approved Vendor



Overview of Disclosure Form Changes – Distributed Generation

- **Overview of new efficiency graph**

- Project's estimated starting efficiency is auto-calculated using Disclosure Form inputs



Overview of Disclosure Form Changes – Distributed Generation

- Updated savings section with new method for calculating estimated value of electricity generated by the solar project
- Removal of value of electricity and savings section on Disclosure Forms for commercial and industrial customers and public school projects

To estimate overall savings over the first 15 years (if any), compare the expenses to the estimated benefits:

Benefits	
Medium estimate of value of electricity generated over 15 years	\$<< fill in from above >>
Value of federal tax credit (if any)	Consult a tax professional
Illinois Shines incentive payment paid to customer (if any)	\$<< fill in from above >>

Expenses	
Medium estimate of value of electricity generated over 15 years	\$<< fill in from above >>
Value of federal tax credit (if any)	Consult your financing agreement (if applicable)



Overview of Disclosure Form Changes - Community Solar



Overview of Disclosure Form Changes – Community Solar

Please note: TBD forms for Community-Driven Community Solar are prohibited for the 2023-24 Program Year

- **Simplified form navigation/organization and auto-calculations**
- **Clarity on community solar rate and payment information**
- **Community solar provider authorization to manage customer's utility account**

Rate and Payment Information

Enrollment fee or amount due at contract signing	\$0.00
Subscription structure and rate	Payment equal to 80.00 % of community solar credits on your utility
Frequency of payments and start date	Monthly starting June 1st
Format of bill	Electronic
Payment method options	Payment will be administered through Subscriber utility bill

Authorization to Manage Your Utility Account and Bill Payment

Be sure to carefully review all agency authorization agreement that your community solar provider requires you to sign.

This community solar offer requires you to authorize the community solar provider to act as your agent with respect to your electric utility account. (Other community solar offers may not require this authorization). The community solar provide may pay your electric utility bill on your behalf and then bill you for those changes in addition to your community subscription costs. Your community solar provider may also require authorization to make other changes to your utility account, including, but not limited to changing your online account log-in credentials and your energy supplier, and may require authorization to accept utility notifications on your behalf.

Overview of Disclosure Form Changes – Community Solar

Updated savings section that calculates estimated bill credits for the first year based on bill crediting rate (Price to Compare for utilities ComEd and Ameren)

Estimated bill credits for first year		Estimated subscription payments for first year		Enrollment fee		Estimated total savings for first year
\$ <<>>	-	\$ <<>>	-	\$ <<>>	=	\$ <<>>
Estimated first year production of electricity from your share of the solar project, multiplied by the bill crediting rate		Your subscription fee is XX% of your bill credits		Enrollment fee or amount due at contract signing fee		Make sure to also consider any other fees or costs disclosed above

Variable Rate Structure

Estimated bill credits for first year	\$XX,XXX.00
Estimated first year production of electricity from your share of the solar project, multiplied by the bill crediting rate (x.xx cents/kWh)	



Disclosure Form/Portal Walkthroughs



PDF Review - Distributed Generation and Community Solar



Overview of API and CSV Functionality



Overview of CSV Functionality

Use a CSV template to create Disclosure Forms in bulk



There are 4 templates available: DG Purchase, DG Lease, DG PPA, and CS.



The fields in the template correspond to those in the portal.



Data validations apply as well, so reference the template, and user guides to ensure you are filling out the template correctly!

Overview of API Functionality

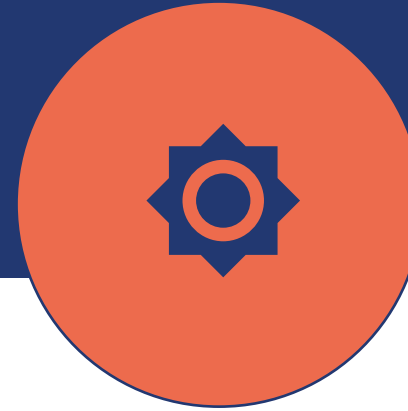
CS API will be available to support Version 2 Disclosure Form activities



3 endpoints allow for form creation, download (and access of specific data fields), and upload of signed forms.



Users will need to access the staging environment to test and validate their code.



Updated Version 2 Documentation will be provided through the working group today **5/18.**



Reach out to admin@illinoisabp.com subject line "API Inquiry" to be included in API-related correspondence.

General Announcements and Reminders



General Announcements and Reminders

May 31, 2023	Old Disclosure Forms will not be available for creation in portal after this date (AVs and Designees should have already started old Disclosure Forms have compliance/submission pathways).
June 1, 2023	Cutover Date for new Disclosure Forms for DG.
June 29, 2023	<i>Community Solar leniency period has been extended through this date.</i>
June 30, 2023	Cutover Date for new Disclosure Forms for Community Solar.

General Announcements and Reminders

Stakeholder Support

- Expanded Office Hours
 - May 26 from 11:00 a.m. – 1:00 p.m. CPT
 - June 1 from 10:00 a.m. – 11:00 CPT
- Contact
 - admin@illinoisabp.com
 - 877-783-1820

Customer Support

- Customer facing resources on website
 - Annotated Disclosure Forms
 - FAQs
- Additional updated resources
 - Updated Program brochures
 - Updated Guide to Going Solar graphic (Timeline)





Questions and Answers

Thank you!

General Program Administrator

Admin@illinoisapb.com

