Annual Reports, New Disclosure Forms, and Long-Term Plan Stakeholder Feedback Released

June 9, 2023

Program News

- **Annual Reports -** AVs participating in Illinois Shines are required to submit an Annual Report pertaining to the contracts and systems in their portfolio.
  - On May 1, 2023, AVs received an email that gave an overview of the Annual Report process including the model, requirements, and a general timeline for important Annual Report dates. Community Solar AVs received an email that provided guidance on updating their Subscriber Workbook which included important reminders; **Subscriber updates are due June 10, 2023**.
  - An informational webinar was held Tuesday, May 9, 2023, and the recording and presentation slides have been uploaded to the Program Year Updates page on the website.
  - **Annual Reports will open on July 1, 2023 and are due no later than July 17, 2023. Failure to submit an Annual Report is an Event of Default under the REC Contract and could impact an Approved Vendor's standing in the Program.**
    - **A guide to completing the Annual Report will be distributed to AVs on June 16, 2023.**
- **New Program Year -** The 2023-2024 Illinois Shines Program year began on June 1, 2023. The new Program year brings new block capacity across project categories and groups, new REC prices, updated contract requirements, an updated Program Guidebook, an updated Consumer Protection Handbook, new Disclosure Forms, the start of the first year of the Minimum Equity Standard requirements, and more. An announcement published on June 1, 2023 provided updated Program documents including:
  - Program Guidebook – May 31, 2023 version – updated to conform with the ICC's Order on Reopening dated May 4, 2023 (Docket 22-0231) and to correct typographical errors
  - Consumer Protection Handbook – published April 17, 2023 - effective June 1, 2023
  - Distributed Generation and Community Solar Contract Requirements – effective June 1, 2023
  - Program Year 2023-2024 REC Prices
  - REC Payments Calculator
  - Updated Distributed Generation and Community Solar Program brochures and *Guide to Going Solar* flyer/timeline at www.IllinoisShines.com
  - Program Year 2023-2024 Webinar – May 25, 2023 - recording, presentation slides, Q&A
  - As a reminder, the Program website recently updated the block capacity dashboard to provide a clearer resource for stakeholders to view the status of Program capacity, and restored the Project Map, a dynamic, visual map tool to search projects by Approved Vendor, Energization status, Program category, projects or kilowatts, county, zip code, and application ID to view project information.
  - The Agency is currently working on a rationale document that outlines the process for the reallocation of uncontracted capacity from the 2022-23 Program year. This rationale document will be released as a stand-alone announcement in the coming days.
- **New Disclosure Forms for Program Year 2023-2024 -** On May 5, 2023, the Program announced the release of new DG and CS Disclosure Forms, which are now available in the portal and required for use by participating AVs and Designees effective June 1, 2023. An additional announcement with updates was sent out on May 18, 2023. Below are notable highlights from the announcements and additional information regarding the new DFs.
  - The Program Administrator has provided the new CSV Disclosure Form templates on the Program's Resources page and published updated PDF and video DF walkthroughs on the Portal Help Guide page.
  - **The Disclosure Form leniency period for Community Solar (creating a limited exception to the requirement that Disclosure Forms must be signed before the subscription contract) will extend through June 29, 2023.** This extension does not apply to Distributed Generation Disclosure Forms, and the leniency period for the DG Disclosure Forms officially ended on May 31, 2023 as shared in the May 5 announcement;

- o The SharePoint workaround process for the CSV upload of Disclosure Forms was discontinued effective May 31, 2023.
  - o In the June 2, 2023 weekly announcement the Program Administrator provided updates to Program participants on bug/functionality issues with the new Disclosure Forms. Please contact the Program Administrator at admin@illinoisabp.com if you have any questions or concerns.
- **Long-Term Plan Update -** The Illinois Power Agency has issued the first two sets of requests for stakeholder feedback as the Agency prepares to develop its 2024 Long-Term Renewable Resources Procurement Plan. The linked information below provides background on the various feedback requests for stakeholder input, additionally the links provide details for how to submit responses. Stakeholders may respond to any of these subjects or submit feedback on any other topic related to the Agency's work. Chapters 7 and 10 are directly applicable to Illinois Shines program requirements.

  The May 26 stakeholder feedback request subjects are listed below. Comments are due **June 16, 2023** and the draft of the plan will be released for public comment on August 15, 2023.
  - o Chapter 3: REC Portfolio/RPS Budget and Goals
  - o Chapter 4: REC Eligibility
  - o Chapter 5: Competitive Procurements
  - o Chapter 6: Self-Direct Program
  - o Chapter 9: Consumer Protection

  The June 8 stakeholder feedback request subjects are listed below. Comments are due **June 29, 2023** and the draft of the plan will be released for public comment on August 15, 2023.

  - o Chapter 7: Illinois Shines
  - o Chapter 8: Illinois Solar For All
  - o Chapter 10: Diversity, Equity, and Inclusion
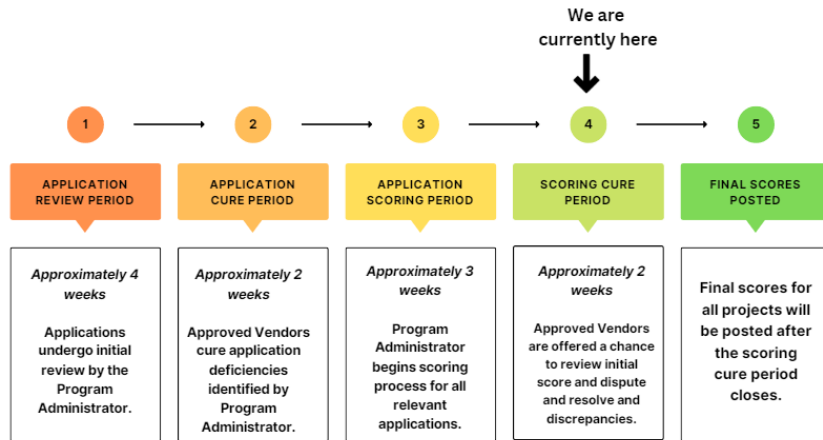 - o REC Pricing Study by Sustainable Energy Advantage

Ongoing Operations Updates
- **Portal Tips and Tools -** Below are tips to assist those submitting applications:
  - o *Need Info -* Resolving the high *Need Info* volume and resulting delays in application approvals is a high priority. The *Need Info* working group, created to address this volume of applications continued to resolve currently flagged applications and prevent erroneous patterns. The *Need Info* working group has identified the most common causes of *Need Info* requests resulting from AV submissions on project applications. These include:
    - ▪ Part I Applications
      - • Inconsistency or errors in Financing/Ownership structure: For example, project is listed as "Customer-Owned", but owner listed on DF and/or Application is conflicting.
      - • Documents uploaded for wrong property address.
    - ▪ Part II Applications
      - • Meter photos which do not show cumulative lifetime meter reading as required.
      - • The number of modules in the application do not match the number of modules shown in the array photos as required.
      - • Demographic and zip code information missing or incomplete. Reminder, this requirement comes from the Climate and Equitable Jobs Act.
      - • The inverter information in the application does not match the inverter photos.
- **May REC Invoicing Opened June 1, 2023 -** REC invoices and Quarterly Netting Statements will be made available for download from Approved Vendor SharePoint folders on the morning of June 1, 2023. Invoices must be submitted to the utility by **tomorrow, June 10, 2023,** to receive payment for the June invoice period.

Any invoice amounts not submitted to the utility by June 10, 2023 will be carried forward and included in the next invoice period (September 2023).

Application Processing Updates

- **Application Processing Tables -** The Program Administrator updates the application processing tables at IllinoisABP.com/project-application-reports/ on Mondays, Wednesdays, and Fridays. On June 9, 2023, the Program Administrator published its newest Weekly Detail on Application Processing Progress announcement, including updated processing tables and staffing and portal improvements. For questions about specific project applications, please contact the Program Administrator at admin@illinoisabp.com.
- **Community-Driven Community Solar Application Review and Scoring Process –** The Program Administrator has completed the application scoring period. Community-Driven Community Solar projects entered the scoring cure period on May 26, 2023. AVs, please check your SharePoint folders for more information regarding the curing of any *Need Info* requests related to project scores. Please respond promptly when possible so the scoring cure process can close out on time.

Ongoing Program Portal Updates

- Ongoing portal updates can be found at IllinoisABP.com/portal-updates/, and a library of portal help guides can be found at IllinoisABP.com/portal-help/.

  ### Updates on Portal Issues, Improvements, and Future Releases
  - The planned system maintenance windows on **Tuesday and Thursday evenings (from 8:00 p.m. to 10:00 p.m. CPT) will extend through June**. During these maintenance windows, the Portal is expected to be unavailable to users, which the Program Administrator and Agency hope will be minimally disruptive to Program participants. **Any users working in the portal should save their work prior to the 8:00 p.m. CPT start of the system maintenance window each day, as any unsaved information will be lost when the system is moved into maintenance mode**. In the event that portal restoration is unexpectedly incomplete as of 10:00 p.m. CPT on a given evening, an update notice will be sent to AVs and Designees.

Development Focus	Details	Planned or Actual Delivery
Enhancements, Features and Bug Fixes		
New DFs for 2023 Program Year	All DF have been updated for the 2023 Program year. The revised DG DF PDF is shorter (4 pages) and now includes efficiency information and infographics. The CS form PDFs have been enhanced as well and is now two pages. Visit https://illinoisabp.com/portal-help/ for updated user guides.	June 1, 2023
Capacity Management for 2023 Program Year Blocks	Capacity Management logic has been updated for the 2023 Program Year Blocks. Block limits are configurable by administrators within the portal. The portal will automatically close blocks once the maximum allocation is reached and start waitlisting projects. Application Processors can view live capacity data from the "Capacity Block" tab under Administration > Capacity Block Workbench.	June 1, 2023

API for Community Solar Disclosure Forms	An API specific to Community Solar has been released for AV and Designees wishing to build automated integrations between their systems and the portal. The API includes functionality to create a DF, retrieve status and calculated values from a DF or it's associated Project Application, retrieve a PDF copy of the DF for signature, and upload a signed PDF of the DF. AVs or Designees interested to develop their own integration between their applications may request credentials by completing the intake form at https://forms.office.com/r/ZsDHWsTaYH.	June 1, 2023
Identified Application and Disclosure Form Issues - Launch Related	A variety of project application, API, and Disclosure Form items have been remedied following June 1, 2023 Program year opening: • Updated Character limits for Disclosure Form CSV upload process • The character limits of five fields in the Disclosure Forms have been updated to match the portal versions of the forms. • A corrected CSV Template for "Distributed Generation - Project Lease" button was updated to properly provide the template. • The project application form was updated to ensure a required response only applicable to CDCS was corrected. • Other project application field validation issues have been corrected, with additional data field validation and auto-population issues being addressed. Updates will be added to the Portal Updates page of the Program website.	June 3, 2023
Re-batching Functionality	On/off toggle, ability to create batches by project and by batch Screen, export Batch Shuffling and Batch Audit Log.	Tentatively planned for Q3 2023.
Development Focus	**Details**	**Planned or Actual Delivery**
Required Functionality		
Program year (PY) 2023-2024 Updated Disclosure Forms	Implementation of updated English and Spanish DFs covering all DG and CS.	June 1, 2023 for Program year opening.

Requirements and Reminders

- **Minimum Equity Standard (MES) Compliance Plans -** MES Compliance Plans were due June 1, 2023 and <mark>any plans that have not been submitted ARE OVERDUE. **Failure to comply with this Program requirement by June 15 will result in escalation of the matter to the Program Administrator's Consumer Protection Team**</mark> and may result in disciplinary action. The Program Administrator is currently working to score submitted plans. AVs and Designees can expect to be notified of their MES Score by mid-June. If you have not submitted your MES Compliance Plan, please contact the PA at admin@illinoisabp.com for assistance.

- **Stakeholder Feedback -** This table outlines current and forthcoming proposals and feedback requests:

Proposal or Feedback Topic and Link to Details	Request for Comment Released	Deadline for Comment	Results or Updates to Request
REC Price Modeling Update for Next Long-Term Plan	March 7, 2023	April 4, 2023. Comments have been shared at the Agency's website.	Under Agency review. To be included in Next Long-Term Plan.
Long-Term Plan: Chapter 3: REC Portfolio/RPS Budget and Goals Chapter 4: REC Eligibility Chapter 5: Competitive Procurements Chapter 6: Self-Direct program Chapter 9: Consumer Protection	May 26, 2023	June 16, 2023	Draft Plan to be released expected August 15, 2023.
Long-Term Plan: Chapter 7: Illinois Shines Chapter 8: Illinois Solar For All Chapter 10: Diversity, Equity, and Inclusion REC Pricing Study by Sustainable Energy Advantage	June 8, 2023	June 29, 2023	Draft Plan to be released expected August 15, 2023.

- **Program Administrator Office Hours -** AVs and Designees experiencing technical difficulties with use of the portal or in resolving other challenges are invited to utilize open Office Hours that the Program Administrator

offers via Zoom, using a waiting room format to support meetings with individual AV or Designee teams for privacy. Upcoming Office Hours include the following dates and times with more dates expected to follow, using Join link: https://energy-solution.zoom.us/j/95588710302Co

- o   Wednesday, June 14, 10:00 a.m. – 11:00 a.m. CPT
- o   Wednesday, June 21, 10:00 a.m. – 11:00 a.m. CPT

REMINDER: All transition updates can be found on the ABP Transition Hub webpage, and a new Events & Engagement page at the Program website provides a calendar of upcoming webinars, meetings, support, feedback requests, key dates, holidays, and more. Please visit IllinoisABP.com/events-engagement/ for continuous updates.

CONTACT US: For portal, application, or Program-specific questions and inquiries, please contact admin@illinoisabp.com or call 877-783-1820.