

## Designee Request Form

Section 2.G of the Program Guidebook describes a requirement for any third-party (i.e., non-Approved Vendor) entities that have direct interaction with end-use customers of the Illinois Shines program to register as a Designee and be listed on the Illinois Shines website, along with the Approved Vendors with which they work. The purpose of this requirement is to increase transparency for the Program. Potential customers will be able to verify that a company that reaches out to them is a registered Program participant and likewise be able to review if they are listed in the Program's consumer complaint database or the disciplinary actions report. All Designees are added to the Program's Designee database once registered. This database is housed on the Illinois Shines website. **All third-party entities that have direct interaction with end-use customers of the Illinois Shines Program need to register by submitting a Designee Request Form.**

Designees of Designees are referred to as Nested Designees and can be registered underneath the Designee(s) with which they work. A Nested Designee may hold only Marketing or Sales Designee or Installer Designee roles. Nested Designees may not hold Disclosure Form Designee or Community Solar Subscriber Agent Designee roles. This requirement exists to prevent a Designee from giving another Designee the ability to generate Disclosure Forms or manage community solar subscribers on behalf of the parent Designee's Approved Vendor. Only Approved Vendors can add Disclosure Form Designees and Community Solar Subscriber Agent Designees directly beneath their Approved Vendor account.

- **Disclosure Form Designee** — An entity that is permitted to generate Disclosure Forms on behalf of an Approved Vendor. A Disclosure Form Designee may create disclosure forms only after it has established an affiliation in the portal in that role with at least one Approved Vendor
- **Community Solar Subscriber Designee** — An entity that is permitted to manage the community solar subscription information for an Approved Vendor's community solar projects.
- **Marketing or Sales Designee** — An entity that is designated to act as a marketing agent and/or customer acquisition agent on behalf of the Approved Vendor or Designee. This includes, among others, entities that engage in solicitations through any channel (in person, telephone, etc.), as well as entities that perform online lead generation.
- **Installer Designee** — An entity that has been designated to install systems on behalf of an Approved Vendor or Designee.

The IPA and Program Administrator reserve the right to add or remove roles as needed over time. Once a Designee has completed, initialed, and signed the Designee Request Form, it should be emailed to the Approved Vendor/Parent Designee to return to the Program Administrator. In writing, the Approved Vendor/Parent Designee must provide approval to the Program Administrator to accept the Designee Request Form. A new Designee is not authorized to act in the indicated role until affirmatively approved in writing by one or more Approved Vendors/Parent Designees. A Designee is authorized to act only in that designated role with Approved Vendors/Parent Designees that have approved it as a Designee and have not revoked that acceptance.

Failure by a Designee to comply with applicable Program requirements could subject the Designee to suspension or termination from registration. If the Designee ignores a suspension or termination decision made by the Program Administrator or the IPA and continues its market activity nonetheless, any Approved Vendor or Designee that works with the Designee during that period may be subject to discipline. Likewise, Approved Vendors and Designees found to be working with entities that fail to register as Designees with the Program will be subject to discipline.

Approved Vendor/Parent Designee

Approved Vendor/Parent Designee ID

**Designee/Nested Designee Information**

Name

Company Name

Street Address

Phone

City

State

Email Address

Zip Code

Type of Designee/Nested Designee:

Disclosure Form Designee

Community Solar Subscriber Designee

*Select all that apply*


Marketing or Sales Designee

Installer Designee

**D/B/A Information:** Please provide information related to “trade name”, “assumed name” or other “doing business as” (d/b/a) company name information.

**Social Media:** Please include all social media accounts that contain Illinois Shines information, market your company’s Illinois Shines offers, and/or connects customers to the Illinois Shines program

We hereby agree to the following terms and conditions for our approval and ongoing participation as an Approved Vendor Designee (“Designee”) in the Illinois Shines Program.

We have reviewed and commit to comply with all Illinois Shines requirements applicable to our work as a Designee.

We have read, understand, and will abide by the Consumer Protection Handbook, Program Guidebook, and associated materials, and commit to ensuring that our employees and any agents operating on our behalf are trained to understand and abide by these requirements.

We acknowledge that, subject to our approval as a Designee by one or more Approved Vendors, we will be listed in a public database of Designees on the Illinois Shines website (illinoisshines.com).

We will maintain accurate, current, and comprehensive registration information related to our business relationships with Approved Vendors and Designees and acknowledge this information is subject to review, verification, and acceptance by the Approved Vendor.

We acknowledge and accept that Designees that act in violation of Illinois Shines requirements are subject to disciplinary action from the IPA which could result in suspension from the Illinois Shines program of both the Designee and/or any Approved Vendors on whose behalf the Designee ultimately acts.

Additionally, through my execution below, I assert that I have the authority to enter into binding agreements on behalf of this Designee.

Signature

Print Name

Title

Company

Date