Energization Extensions for November, Advance of Capital Evaluation Criteria, CDCS Update

November 17, 2023

<u>Program News</u>

- **Illinois Shines Program Holiday Hours -** In observance of Thanksgiving holiday the Program will have limited services and updates on November 24 – 25, 2023. The Program's contact center will be closed, updates to the Capacity Dashboard, Application tables, and application project reports or waitlists will resume November 27, 2023. There will be no weekly announcement.
- **Energization Extensions for November -** To maximize the number of Energization extension requests processed before the Thanksgiving holiday, please submit any energization extension requests for November as early as possible. The Thanksgiving holiday will impact the number of days available to process extensions.
- **Equity Eligible Contractor (EEC) Program News -** Recent EEC updates include the following:
  - o **Advance of Capital Evaluation Criteria -** Stakeholders comments were due on November 14, 2023, and five commenters submitted their feedback. Comments have been posted to the Program website and are currently under Agency review. The Agency tentatively estimates finalizing and publishing the final Advance of Capital evaluation criteria at the end of the month and begin accepting re-submissions of requests during the month of December.
  - o The **EEC Project Category Hub** has previous updates on: Equity Investment Eligible Community (EIEC) Map Updated, Advance of Capital Authorizations Temporary Pause, EEC Waitlists, and other items.
- **Community Solar Program News -** Recent CS Program updates include:
  - o **Program Year 2023-24 Community-Driven Community Solar (CDCS) -** As announced on Monday, October 30, 2023, all projects submitted in the 2023-2024 Program Year have been processed and scored. The appeal period has concluded, and the Agency did not receive any appeals. The Agency will hold a Random selection event for projects with tied scores on:
    - ▪ **December 6, 2023 at 2:00 p.m. CPT**– Registration link: https://energy-solution.zoom.us/webinar/register/WN_2m44QuuCTOiN2-FDKEu3EQ
- **Minimum Equity Standard (MES) Mid-Year Reports Due – December 31, 2023 -** Mid-Year Reports to show progress toward meeting the Minimum Equity Standard for the 2023-24 Program Year are due December 31, 2023. Participating Approved Vendors and Designees should submit their Mid-Year Report for Program Administrator review by completing the form found here. If your organization is struggling to meet the requirement, the Program Administrator will reach out after your submission is received to share additional resources and guidance.
- **Distributed Generation (DG) Program News -** Recent DG updates include the following:
  - o **Power Purchase Agreement (PPA) Pricing in Disclosure Forms (DF) – Entry Clarification -** In the PPA Disclosure Form, AVs and Designees are required to enter the starting and ending price per kWh for the PPA. The fields specify that the prices are in dollars ($). The Program Administrator has seen an increase in DFs generated with the price incorrectly entered – for example, if the price is 13 cents/kWh, it should be entered as $0.13/kWh, and NOT as $13.00/kWh. The Program Administrator encourages AVs and Designees with pending PPA applications to review their DFs to ensure these fields were appropriately completed. The Application Processing team will review DFs for this issue and will place incorrect DFs into *Needs Info* status. For any incorrectly completed DFs, the AV or Designee must generate and have the customer sign a new, corrected DF.

- o **DG Disclosure Form (DF) Application Programming Interface (API) Working Group** – The third session was held on November 7, 2023. A fourth and final session, including stakeholder support, will soon be scheduled. AVs and Designees interested in participating should email the Program Administrator at admin@IllinoisShines.com.
- **Chicago Jobs Council Roundtable Session and Networking Event on November 20, 2023** – The Chicago Jobs council is hosting a roundtable session and networking event that will focus on increasing EEC participation in the CEJA Contractor Incubator Hubs Program. The hybrid event will be held on November 20, 2023, from 9:00 a.m. to 11:00 a.m. CPT. Interested stakeholders are asked to RSVP by November 15, 2023, and questions may be directed to Mimi Hutchinson at mimi@cjc.net or (312) 252-0460 x303. For details on the event and/or to RSVP visit https://cjc.app.neoncrm.com/np/clients/cjc/eventRegistration.jsp?event=5587&.
- **180-Day Prioritization Window for Public Schools Subcategories Closes on November 28, 2023** - As stated in the Program Guidebook Section 1.D., Public Schools projects are allocated by Group, Tier, location, and project size. With separate allocations to Groups A and B, 70% of capacity will be allocated to schools categorized as Tier 1 and Tier 2 schools, or located within Environmental Justice Communities (EJCs), and 30% will be allocated to Tier 3 and Tier 4 schools not located within EJCs. The Guidebook includes a table with public school block sizes for the 2023-24 Program Year on page 13. If any of the allocations are not filled within the first 180 days of the Program Year, public school projects will be accepted on a first come, first serve basis regardless of Tier, EJC location, or project size. The 180-day prioritization window closes on November 28.
- **Designee Renewal Process** - Section 2.G of the Program Guidebook states that "Designees must renew their registration once a year. As part of this process, Designees will submit their training materials and certifications showing that their agents have been trained in accordance with Program requirements." Examples of applicable training materials include PowerPoints, handouts, and other resources shared with Designee agents for Program-related training. Designee renewals are due on November 30, 2023, for all Designees and Nested Designees that registered in the Illinois Shines program before August 1, 2023. If a Designee or Nested Designee is no longer participating in Illinois Shines, it should use the renewal form to indicate this, and it will be removed from the Program. **It is the AV's responsibility to ensure that their Designees and Nested Designees are compliant with this Program requirement**; non-compliance may result in the Program Administrator requesting the AV provide its Designee Management Plan for Program Administrator review, and possible additional responses as set out in the Consumer Protection Program Violation Response Matrix located in Section X.D. of the Consumer Protection Handbook. Any Designees and Nested Designees that do not renew their status will receive a Notice of Potential Violation and may be subject to disciplinary action. The application for Designee renewal can be found here: https://forms.office.com/r/NJF18YrAnT.
- **Consumer Education and Protection**
  - o **DG Project Look Up Tool** - The Program website has restored a Project Look Up tool, enabling customers to view the status of DG projects submitted to the Program. The tool, which requires the entry of an Application ID, a Disclosure Form ID, or the customer email address, is available at the Program website's Project Status page.
  - o **Consumer Satisfaction Survey** - As previewed during the July 7, 2023, Consumer Protection Working Group, in the coming weeks, the Program Administrator will distribute its first Consumer Satisfaction Survey. The Program Administrator will issue this survey to a randomly selected group of Small Distributed Generation consumers whose projects were approved by the Illinois Commerce Commission in the past six months. The purpose of the survey is to better understand consumers' experience working with Illinois Shines participating entities and to help us improve consumer protections within the Program. Customers are not required to provide their name and are not asked to identify the AV or Designee with whom they contracted. If you receive questions from customers who receive the survey, please feel free to direct them to the Program Administrator.

o The Vendor-oriented [Consumer Protection Requirements and Resources Hub](#) contains important information and links, including information on Net Metering Credits and Vendor DF Resources. Recent updates include: [Reminder to Register Designees/Nested Designees](#), [When Are Net Metering Waivers Applicable?](#), and [Disclosure Forms (DFs) - When New DFs are Needed, Signatory Requirement Exceptions, and Portal Inputs](#).

Ongoing Operations Updates

- **Re-Batching for ICC Meetings -** In advance of each submission of batches to the ICC for approval, AVs are provided the opportunity to withhold or re-batch projects. In the absence of any action by an AV, the Program Administrator will re-batch the projects at their discretion and submit eligible projects to the ICC.

  It is extremely important that AVs review their re-batching files on SharePoint to indicate any re-batching preferences, but especially requests to withhold projects from submission. The Program Administrator alerts AVs by email when they have projects that are eligible for re-batching and planned to be submitted to the ICC in the next memo. Unfortunately, sometimes these communications are missed and projects are submitted to the ICC despite an AVs intent to hold a project back.

  The Program Administrator requests that AVs who believe they may want to withhold or re-batch projects mark their calendars and review SharePoint folders for re-batching templates. This way, if any email alerts are missed, AVs are still aware of the dates that re-batching opens and can check if any projects are in the upcoming ICC submission. Below are re-batching windows for the rest of 2023 and for the first part of 2024:

Re-Batching Opens for AVs	Election Deadline – 12:00 CPT (Re-batching closes for AVs)	Trade Date (ICC Meeting Date)
11/28/2023	11/30/2023	12/14/2023
12/14/2023	12/18/2023	1/3/2024
12/28/2023	1/2/2024	1/17/2024
1/12/2024	1/17/2024	1/31/2024
1/23/2024	1/25/2024	2/8/2024
1/31/2024	2/2/2024	2/20/2024
2/20/2024	2/22/2024	3/7/2024
3/5/2024	3/7/2024	3/21/2024
3/19/2024	3/21/2024	4/4/2024

Application Processing Updates

- **Reminder that Project Submissions to Group A Still Encouraged** – Although both distributed generation blocks of annual capacity for Group A have been exhausted for this Program Year, AVs may still submit applications to reserve a place on the waitlist for the next Program Year for each Program category. AVs are encouraged to submit applications as they are ready instead of holding applications until June 2024. Applications on the waitlist will be processed in the order in which they were received once the new Program Year starts on June 1, 2024 when new Program capacity will be released.
- **Extended Part II Application Processing Times** - As [previously shared](#), the Program Administrator continues to receive an unusually high number of Small DG applications. Due to recurring high volumes week over week,

application review time is <u>currently just over a month</u>, exceeding the typical target of two-week processing. The Program Administrator anticipates review times will reduce week over week and will be back within target range for Part I by the end of November 2023 and Part II in January 2024.

- **Application Processing Tables** - Application processing tables are maintained at IllinoisShines.com/project-application-reports/. These tables are updated daily. For questions about specific project applications, please contact the Program Administrator at admin@IllinoisShines.com.
- **Application Tips and Tricks** - Supplementing previous guidance, the Program Administrator seeks to continue supporting stakeholders in the avoidance of project applications entering *Need Info* status.
  - *Need Info Backlog:* Last quarter, 75% of Part I applications and 85% of Part II applications that went into *Need Info* status were verified within an average of 16 days, supported by timely response by Approved Vendors of requested information. The Program's current queue of applications in *Need Info* status is at 2,263, including some project applications that are many months old.
  - Approved Vendors are reminded that timely response to *Need Info* requests is a Program expectation, and that delays in responding can lead to consumer complaints and Program disciplinary action.
  - The most effective way to support expeditious application processing is to ensure it is submitted with complete and accurate information, avoiding *Need Info* requests. When a *Need Info* request is issued, timely response to the Program Administrator is required. A tip for AVs is to search email inboxes for "needs more information" to quickly find requests for information related to applications placed in *Need Info* status. AVs may request clarifications as needed, or to initiate dialog to work through unusual situations, and responding to a *Need Info* email, rather than starting a new email thread, will result in quicker processing. *Need Info* requests are sent on Mondays and Wednesdays.
  - For DG projects, the Program website's Look Up Tool can be used to view application status. Sector Strategists can also provide dedicated application and *Need Info* support.

Ongoing Program Portal Updates

- **Portal Upgrade to PVWatts API Version 8 Planned for December 12, 2023** - The Program portal currently uses PVWatts API version 6, to calculate REC values, which is due to be retired in early Jan 2024. A release currently scheduled for December 12, 2023, will upgrade the portal to PVWatts API version 8, which is the most current version. PVWatts V8 also updates the weather data to 2020 TMY data from the NREL National Solar Radiation Database (NSRDB) for locations covered by the database.
- Ongoing portal updates, a Portal Development Roadmap, and a library of help guides can be found at IllinoisShines.com/portal-updates-help-guides/. As of November 14, 2023, portal releases will take place on Tuesday nights. Stakeholders can refer to the Portal Updates page to view the latest market facing enhancements.
- **Updates on Portal Issues, Improvements, and Future Releases** – The planned system maintenance windows on **Tuesday and Thursday evenings** <mark>(from 8:00 p.m. to 11:00 p.m. CPT) will extend through November.</mark> 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 some cases, Portal availability may resume earlier than 11:00 p.m. CPT, though **AVs and Designees should plan on the full three hours.** In the event that portal restoration is unexpectedly incomplete as of 11:00 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		
DF – Archiving for AVs	This new feature will allow Disclosure Forms to be archived, allowing users to archive and remove unneeded DFs from their current lists. Users will also be able to un-archive DFs if needed.	November 14, 2023
Part I Application Validations	This feature adds Program-specific validations into the Part I application, providing users instant feedback when entering project specifications that are outside the bounds of the Program. Validations include but are not limited to: • Warning message will appear when DC to AC size ratio exceeds 155%. • Inverter Size AC kW cannot change by more than the greater of 5% or 1 kW from the size noted on the Disclosure Form. The application will now display the value originally entered in the Disclosure Form under the Total Inverter Size AC field. • Inverter Size DC kW cannot decrease by more than the greater of 5% or 1 kW from the size noted on the Disclosure Form. • AVs can no longer mark that an application is both a co-location and an expansion.	November 14, 2023
Lease & PPA Disclosure Form PDF Page Breaks	This enhancement will ensure that the Value of Electricity and Savings Estimate section on the DG Disclosure Form PDF will not be split up by page breaks, making the section more readable and less confusing for customers who are trying to understand their potential savings.	November 14, 2023
Part II – Subsequent sections missing data when a section is marked not matching Part I	When completing a Part II Application, changing the response to "Does this system still match the information submitted in Part 1?" from "No" back to "Yes" was overwriting new information supplied with the original response, and created an issue when questions/responses not populated in the Part I application overwrote Part II answers with a blank value. To address this issue, the following corrections have been made: • The Part II Question "Does this system still match the information submitted in Part I?" in each section, will only apply to the given section • Once the answer to the question is Changed to "No" and Saved, the field will lock, not allowing the user to change the answer back to "Yes" again • When answer is first changed to "No", the other Part II fields in that section will retain their original values from Part I until the user changes them	November 14, 2023

Requirements and Reminders

- **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
Advance of Capital Evaluation Criteria	October 31, 2023	November 14, 2023	The Agency is reviewing submitted comments. Comments have been posted to the Program Website.
Draft 2024 Long-Term Renewable Resources Procurement Plan	August 15, 2023	September 29, 2023	The filed 2024 Long-Term Plan and Redline between the Draft 2024 Plan and Filed 2024 Plan, along with stakeholder comments for Chapter 7, 9, and 10 have been posted at the Program's website; all other comments have been shared at the Agency's website.

- **Long-Term Plan Update -** As announced on October 23, 2023, the IPA filed the 2024 Long-Term Plan with the ICC on October 20, 2023. Stakeholders can engage with the filed 2024 Long-Term Plan in Docket 23-0714 following the ICC's rules of practice. Please keep in mind that the filed 2024 Plan is not finalized upon filing and anything contained within the Plan should be considered preliminary. The Agency expects a final order from the ICC regarding any contested issues in the 2024 Long-Term Plan no later than February 20, 2024, which will contain the final determination on any contested issues. Then the Agency will publish a final 2024 Long-Term Plan in compliance with that final order, marking the conclusion of this process. Stakeholders can access the filed 2024 Long-Term Plan and Redline between Draft 2024 Long-Term Plan and Filed 2024 Long-Term Plan on the Program Documents page on the website.

- **Part II Verification Cut Off for November -** To allow time for invoice calculation and generation, the last valid Part II Verification date for November will be November 24, 2023. Applications that are Part II verified on or before November 24, 2023, will be included in the December invoicing period. Application processing will continue throughout the last week of the month and any applications that are reviewed between November 25, 2023 and November 30, 2023, will be invoiced in January 2023.

- **IPA Issues Request for AVs and Installer Designees Interested in Serving Stranded Illinois Shines DG Customers -** As previously announced, the Program continues to review submissions on a rolling basis for entities interested in serving stranded customers, with particular interest in identifying AVs and/or installer Designees willing to assist stranded customers with project maintenance/repair work. Please see the full Request for AVs and Designees, including details regarding the opportunity to support stranded customers, eligibility requirements, and anticipated responsibilities.

- **Program Administrator Office Hours -** Existing and prospective AVs and Designees who have Programmatic questions, project application inquiries, are experiencing technical difficulties with the Program portal, or seek support in resolving other challenges are invited to attend open Office Hours offered by the Program Administrator each week. These Zoom meetings use a waiting room format to support meetings with individual AV or Designee teams for privacy. Upcoming Office Hours and join link: https://energy-solution.zoom.us/j/95588710302Co
  - Wednesday, November 22, 10:00 a.m. – 11:00 a.m. CPT
  - Wednesday, November 29, 10:00 a.m. – 11:00 a.m. CPT
  - Wednesday, December 6, 10:00 a.m. – 11:00 a.m. CPT

REMINDER: All Program updates can be found on the Program Updates webpage, and a Vendor Forums & Key Dates page at the Program website provides a calendar of upcoming webinars, meetings, support, feedback requests, key dates, holidays, and more. Please visit IllinoisShines.com/vendor-forums-feedback/ for continuous updates.

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