

# Questions & Answers from the May 18, 2023 New Disclosure Forms Webinar



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## When are new DFs needed?

*If a new DF needs to be created between Part I and Part II, and the original DF was the prior version, which version of the DF will now be needed?*

- We are still finalizing and confirming the options that will be available after the new Disclosure Forms launch and will release additional information on this topic.

*In situations where a new Disclosure Form is needed, but only a few fields need to be updated, will the Portal allow users to generate a copy of the old Disclosure Form to edit, rather than requiring all of the information to be re-entered?*

The portal previously supported the ability for Approved Vendors and Designees to generate a revised Disclosure Form based on a previous Disclosure Form with the support of the Program Administrator in order to revise a submitted Disclosure Form. This functionality will not be available on June 1, but the Program Administrator is developing features to streamline operations including this request.

## DG DFs

*At this time, DG participants do not have access to a functional API or CSV tool to complete Disclosure Forms. Can the Program describe how the following logic does not also apply to DG participants the under the Program?*

- The Program carefully considered the requests and information we received from Program participants regarding the DF cut-over date and the leniency period. This decision was based on differences in customer acquisition. In addition, the CSV tool will be available for DG (as well as community solar) on June 1, 2023.

*Is the DG Rebate an optional field?*

- Yes, there will be an opportunity for the AV/Designee to enter whether or not the project will take the DG Rebate. If not, further questions will not be asked about the Rebate and that information will not appear on the DF. If a new DF needs to be created between Part I and Part II, and the original DF was the prior version, which version of the DF will now be needed?

*We are receiving complaints regarding the leniency period ending, and Distributed Generation participants not being able to complete their own Disclosure Forms. Who or where can I refer these complaints to?*

- Please send concerns to the Program Administrator at [admin@illinoisshines.com](mailto:admin@illinoisshines.com).

*Will Disclosure Form editing be available for DG DFs? This was a feature that we were anticipating on June 1.*

- There will not be an option to edit DG Disclosure Forms. Once a form is submitted, you cannot edit the information. We intend to offer an option to generate a new DF based on a previous DF, essentially duplicating the information but with a new DF ID number. However, this option will not be available on June 1, 2023. The Program Administrator is currently scoping this functionality and expects to provide updates in upcoming Program announcements.

*When will the functionality be created to make changes to an existing DG Disclosure Form with ability to have the customer re-sign, without having to create an entirely new Disclosure Form?*

- There will not be an option to edit DG Disclosure Forms. Once a form is submitted, you cannot edit the information. We intend to offer an option to generate a new DF based on a previous DF, essentially duplicating the information but with a new DF ID number. However, this option will not be available on June 1st. The Program Administrator is currently scoping this functionality and expects to provide updates in upcoming Program announcements.

## **New DF Features**

*Will the DFs still have the same footer at the bottom of the PDF pages that include the DF ID and date?*

- The forms will include a header with the disclosure form ID that reads "Solar Project Purchase Disclosure Form - ID# XXXXXX"

## **API**

*How do the auto calculated fields work if we are generating the Disclosure Form outside of the Program portal using the API?*

- All Disclosure Form fields should be accessible through the GET functions. This will be reflected in the updated documentation including the new Developer's Guide.

*Will the DG API be available on June 1, or will only the CSV import be available?*

- The CSV import will be available June 1, but the DG API will not. A DG Disclosure Form API working group will be organized in the near future, with further information forthcoming.

*When should we expect to see these updates in the test API and receive updated documentation?*

- Updated documentation was provided to the Working Group on 5/18. Please reach out to [admin@illinoisshines.com](mailto:admin@illinoisshines.com) if you need to be added to the working group or receive updated documentation.

*Is the API only available for community solar Disclosure Forms, and not DG Disclosure Forms?*

- On June 1, the API will be available for community solar DFs. We will develop the DG API as soon as possible thereafter.

*When can we get details about the production release of the API, including receiving credentials?*

To request credentials, please contact the Program Administrator at [admin@illinoisshines.com](mailto:admin@illinoisshines.com), and you'll be connected to the CS API beta testing process to get involved ASAP. Final credentials will be issued on June 1, but participating in beta testing will provide a big head start for users.

## Testing Requests

*Is the CSV upload template/process fully functional for the new Community Solar DFs? Is there a test area available for this capability prior to June 1?*

- This process will be fully functional on June 1 for both DG and CS Disclosure forms. A test area is not currently available, but a draft CSV template will be available at the Program website's [Resources](#) page, in the Disclosure Forms section, on May 26, 2023. Please note, beginning June 1, 2023, participating entities should always ensure they download the current version of the CSV template from the Program portal.

*Is there a test site we can use to create the new DFs and use the new portal interface?*

- Unfortunately, there will not be a test portal interface available to interact with the new DFs.

*When will the updated CSV upload template example be available for review for the updated community solar DF and can we specify the project in the CSV upload?*

- A draft CSV template will be available at the Program website's [Resources](#) page, in the Disclosure Forms section, on May 26, 2023. Please note, beginning June 1, 2023, participating entities should always ensure they download the current version of the CSV template from the Program portal. There will be a field to specify project ID.

*Will CSV upload templates be available to view before functionality goes live on June 1?*

- The CSV template will be available for use on June 1. A draft CSV template will be available at the Program website's [Resources](#) page, in the Disclosure Forms section, on May 26, 2023. Please note, beginning June 1, 2023, participating entities should always ensure they download the current version of the CSV template from the Program portal.

## Requests

*Can the Program Administrator provide a list of the fields that need to be collected for the new standard DF as well as the validation/requirements for each field?*

- The CSV template will provide the needed field information and will be available June 1. A draft CSV template will be available at the Program website's [Resources](#) page, in the Disclosure Forms section, on May 26, 2023. Please note, beginning June 1, 2023, participating entities should always ensure they download the current version of the CSV template from the Program portal.

*Can we access a copy of the new Community Solar Disclosure Form that was shared on the webinar?*

- The new Community Solar DF that was shown in the webinar will be provided on the Program website in the coming days.

*Could blank Disclosure Forms be provided to AVs/Designees?*

- The Program will not provide blank Disclosure Forms. Because of data integrity and validation concerns, as well as DF ID tracking concerns, all DFs must either be generated in the Portal or through the API. In addition, blank Forms would not be practical because of the numerous dynamic elements in the DFs.

## Listing Fees

*I currently list fees due to both us as the Approved Vendor and our partner broker. If fees are listed in the required fees section, will it separate who it is to be paid to or not?*

- There will be an option to list fees with descriptions and amounts both in the required fees and other fees sections. The description area would be the best place to describe to whom fees are owed. Keep in mind this Disclosure Form is not meant to be an invoice.

## REC Payments

*Currently, we type "TBD" for estimated REC payment. Will we be able to continue this process?*

- This response represents a CORRECTION to information provided in the webinar. The field for estimated REC payment will require a number to be entered and will not accept non-numerical values such as TBD. To calculate the REC payment, you should use the REC prices and the formula for calculating the total REC payment of an energized system, which can be found in the program guidebook. The Program Administrators will be publishing an excel based tool to help calculate these estimated values for the disclosure form.

## Future Features

*Has the Agency considered adding the ability to create a template to start the document? On our DFs the general information remains the same from project to project and if we could have some of the information prefilled it would help us save a great deal of time.*

- The Agency had not previously considered that but will review the request as we are scoping additional portal functionality. The use of the CSV upload feature might be best solution at this time, for these types of scenarios, to accelerate the process on the AV side.

*Would it be possible for the portal to carbon copy (CC) the sender of the DF on the email with the e-Signature request? That would be very helpful to validate to the contractor that the email did successfully get delivered.*

- The Agency appreciates this suggestion and will review and consider this possibility.

## Signing DFs

*Can the DF be signed on the same day as the solar contract, as long as it is signed first?*

- Yes, as long as the DF is signed before the customer contract, both documents can be signed on the same day.

*Can the homeowner still sign either e-sign or wet sign?*

- Yes, the homeowner can still sign by e-sign or wet sign.

*I have noticed that the current Disclosure Form does not include the "sign date" and "printed name" on the is the signature page. Will this be corrected on the new DF?*

- Yes, these items will be corrected on the new Disclosure Forms.

*Is there a PDF paper version of the DG DF that sales representatives can have homeowners wet sign while face to face?*

- AVs/Designees can generate DFs in the Portal and then download and print the DFs for wet signature. There will not be blank PDFs that could be filled out by hand.

## Community Solar DFs

*Are community solar providers able to generate these Disclosure Forms from the portal in their CRM software as was possible with the previous portal?*

- Yes, the API for Community Solar Disclosure Forms that facilitates this functionality will be available 6/1. If you would like to be involved in the API working group and beta testing prior to this release, please reach out to the Program Administrator at [admin@illinoisabp.com](mailto:admin@illinoisabp.com).

*What information should be entered for project name and estimated date for receiving credits if a community solar customer is being added to a waitlist and we do not have those details at the moment?*

- The TBD form is intended to be used when the customer is signing up for a subscription, but the specific project hasn't been determined yet. It is not intended to be used for customers to be put on indefinite waitlists. The TBD DFs therefore do require this information on estimated dates. The "Project Name" field is being replaced with "Disclosure Form Name" which is defined by the user.

*Will the API going live on June 1 create this new DF? Will the interface be updated for the new fields?*

- The API for Community Solar Disclosure Forms will be available on June 1 and the interface will be updated with the new DF fields that were shown in the webinar.

*Will the Illinois Shines brochure be included with the traditional community solar DF?*

- Yes, the applicable informational brochure will be pre-pended to all Disclosure Forms.

*Does the extension of the community solar DF leniency period extend the SharePoint Workaround?*

- The SharePoint Workaround is still being retired on May 31. Beginning June 1, the CSV should be used instead of the SharePoint Workaround.

*The community solar cutover date is end of June. Will we have access to the CSV functionality prior to that date?*

- Yes, the CSV option will **be** available on June 1.

*Does the extended community solar leniency period mean that Version 1 DFs that were sent to customers prior to June 1 and signed before June 30 will still be valid?*

- Yes, this would be allowed even without the leniency period. Version 1 DFs that were sent for e-signature prior to June 1 can be signed after June 1 and will then appear in the Portal as normal.

*What is the process to have an accurate subscription size in kW AC for a community solar customer that is enrolled with TBD disclosure form? We have seen community solar farms that have different production values that can greatly effect the kW AC subscription.*

- The TBD community solar Disclosure Forms are intended to be used when a Community Solar provider or subscriber may subscribe the customer to one of several community solar projects, but the information in the TBD Disclosure Form (rate/price, fees, subscription size, etc.) will not change regardless of which specific project the customer is ultimately subscribed to. It is the responsibility of the Approved Vendor or Designee to ensure that the Disclosure Form is filled out with accurate information and a reasonable estimate of the first-year annual production from a subscription based on subscription size. If there is a change in subscription size that exceeds the permissible variation window set out in the AV Manual, a new Disclosure Form is required. If different community solar projects have a wide variation in capacity factors, Approved Vendors and Designees may want to develop "portfolios" of projects with similar capacity factors and fill out TBD Disclosure Forms to be consistent with a specific portfolio of projects (rather than using the same TBD Form, and inputs, for a variety of projects that have widely differing capacity factors).

## **TBD DFs**

*Is there a way for community solar Designees to fill out a TBD form without a project and without a vendor?*

- Yes.

*What is the process for creating DFs for customers enrolling in Community Driven Community Solar farms where a TBD form is not permitted?*

- The Portal will allow AV/Designees to create either TBD Disclosure Forms, or DFs that are linked to a specific community solar project application. For Community Driven Community Solar projects, the DFs should be linked to that project.

*Can you explain how to submit a TBD form? It looked like vendor ID was a requirement.*

- To submit a TBD form, 99999 can be used as the Approved Vendor ID.

*Following up to the question on how to submit a TBD form, will that be no longer be permitted past June 1?*

- The TBD form exception is not being extended for use in the Community-Driven Community Solar category. Traditional Community Solar projects may continue to use the TBD form for the approved purpose.



*In regards to the REC payment, TBD entry, the video stated we needed to calculate the REC payment amount and enter it on the form. We do not currently do that. Can we continue to put TBD or 0 and allow ABP to calculate that?*

- No, vendors are expected to fill in this amount with the Estimated REC payments for the project. The methodology is provided in the Program Guidebook. Additionally, [this calculator](#) can be used to calculate the estimated value for the specific project for Disclosure Form submission