# MES Mid-Year Reports Due December 31, Program Holiday Hours

## December 22, 2023

Next Two Weeks in Illinois Shines *(Program events & due dates found at the Vendor Forums & Key Dates webpage)*

- Due Dates
  - Sunday, December 31, 2023 by 11:59 p.m. - Minimum Equity Standard (MES) Mid-Year Reports Due

Stakeholder Support

- **Program Administrator Office Hours -** December 27, 2023 and January 3, 2024 - 10:00 – 11:00 a.m. CPT - individual AV or Designee support for Program requirements, portal, application, or other questions. Zoom join link: https://energy-solution.zoom.us/j/95588710302Co
- **Illinois Shines Program Holiday Hours -** In observance of upcoming holidays, the Program will have the following schedule adjustments:
  - Contact Center closures all day on December 25, 2023 and January 1, 2024.
  - Website reports will be updated on their normal schedules, excluding holidays.
  - The Program will not issue a weekly announcement the week of December 25, 2023.
  - *Need Info* emails will be sent once during the week of December 25, 2023.
- **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.
  - Earlier this Program Year the Program Administrator identified the most common causes of *Need Info* requests resulting from AV submission on project applications. These include:
    - Double check that the system size is entered in kW (not Watts).
    - If a customer does not have an email address, AVs/Designees need to fill out a DF email address waiver. The AV/Designee email address should not be entered in the customer email address field.
    - Consider having the DF open when entering the application information. If information is entered that is different from what is on the DF, please add a comment in the Part I Overview or in the Part II Differences section. Unexplained data discrepancies between the DF and the application result in a high percentage of applications moving to *Need Info* status.

Program News – New or Updated Items *(All Program updates can be found on the Program Updates webpage)*

- **2023 Illinois Shines AV and Designee Program Satisfaction Survey Results -** On December 21, 2023 the Program Administrator issued an announcement sharing the results of the 2023 Illinois Shines AV and Designee Program Satisfaction Survey.
- **New to the Program Website -** The following key additions to www.IllinoisShines.com have been shared:
  - New Program Help Guides and Application Tips page
  - CDCS Random Selection Event FAQs (CDCS Program Hub page)
  - MES Mid-Year Report Submission Form (Equity Accountability System page)
  - DG Disclosure Form Deep Dives with updated sample data (Disclosure Form Deep Dive page)
  - Portal Updates Blog will be updated on the Portal Updates page next week
  - The sites' homepage includes a banner addressing block closures and directing visitors to a detailed Program announcement issued November 21, 2023.

<u>Program News – Previously Published Items</u> (*All Program updates can be found on the [Program Updates webpage)](#)*

- **General Program**
    - o **Minimum Equity Standard (MES) Mid-Year Reports Due –** Mid-Year Reports to show progress toward meeting the [Minimum Equity Standard](#) for the 2023-24 Program Year are <mark>due December 31, 2023.</mark> Participating Approved Vendors and Designees are required to 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.
    - o **AV Application Stakeholder Feedback Request**
        - ▪ The Program Administrator proposes to update the current AV application to improve clarity and relevance; incorporate questions on demographic information the Agency is required to collect from AVs; and reflect the application's use for verifying Equity Eligible Contractors.
        - ▪ The Program Administrator seeks feedback on the proposed updated AV application and stakeholder feedback is due <mark>January 11, 2024</mark>. Feedback should be submitted to [admin@illinoisshines.com](mailto:admin@illinoisshines.com). **The updated AV application will go into effect June 1, 2024 for the next Program Year.**
        - ▪ Stakeholders can review the redlined [AV Application](#) and [Program Guidebook Section 2](#) updates on the Program website's [Become and AV or Designee](#) page.
    - o **Draft Drawdown Calculations Now Available to AVs on SharePoint -** Following the cure period for the 2023 Annual Report, the Program Administrator has calculated Drawdowns resulting from the REC Performance Evaluation process and has reported these calculations to the contracting utility. The contracting utility is responsible for providing formal notification of any Drawdown amounts to AVs. Once this formal notification is made, the AV is required to act within a short window of time. To allow AVs more time to become familiar with the calculations and receive support from the Program Administrator before the formal notification on Drawdowns is sent, the Program Administrator is providing DRAFT calculations for your review. Calculations are not final until they have been delivered by the Contracting Utility. There are no changes anticipated between the draft and final calculations; however, if any issues come to light before final calculations are sent there may be adjustments to address those concerns.

        **Timeline for Drawdowns and Related Events**
        - ▪ Approximately January 8, 2024 (or "notice date") – Contracting Utilities provide formal notification of the amount of Drawdowns to AVs.
        - ▪ 5 Business Days after notice date – Deadline for AV to communicate if they prefer to make a cash payment instead of allowing the letter of credit used for collateral to be drawn upon (if applicable).
        - ▪ 15 Business Days after notice date – Utility will draw on collateral unless an alternative request was received from AV (see above) and/or payment was received by the 14th business day after notice date.
        - ▪ 90 days after drawn upon collateral – AV required to top up collateral, if required.

        **Resources:**
        Please see 6(d)(v)(1) on page 9 and Section 4.3 on page 26 of the [2019 REC Contract](#) for full detail on this process.
        - ▪ [REC Performance Evaluation Guide](#)
        - ▪ [REC Performance Evaluation Walk through Video](#)

- **Equity Eligible Contractors (EEC) Program News** - See full EEC [hub on Program website](#)
  - **Advance of Capital Evaluation– Final Criteria Posted** - On [December 12, 2023](#), the Agency published an announcement which provided the [Final Criteria](#) and [Rationale](#) for the advance of capital evaluation criteria. The Agency has resumed accepting new advance of capital requests through Part I applications. Please see the [full announcement](#) for explanation and details.
- **Distributed Generation (DG) Program News** - See full [Small DG](#) and [Large DG](#) hubs on Program website
  - **Guidance on Group A Distributed Generation (DG) Capacity and Waitlists** - As [previously shared](#), guidance on Group A DG capacity and waitlists was provided for [AVs](#) and [Consumers](#).

## 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) |
|---|---|---|
| 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 |
| 4/2/2024 | 4/4/2024 | 4/18/2024 |
| 4/16/2024 | 4/18/2024 | 5/2/2024 |

## Application Processing Updates

- **Reminder that Project Submissions to Group A Still Encouraged** – See prior [announcement](#).
- **Extended Part II Application Processing Times** – See prior [announcement](#).
- **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](#).

<u>Ongoing Program Portal Updates</u>

- 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 –** Scheduled system maintenance windows continue on **Tuesday and Thursday evenings** (from 8:00 p.m. to 11:00 p.m. CPT), during which times the Portal is expected to be unavailable to users, which the Program hopes is minimally disruptive to Program participants. **Users working in the portal should save their work prior to the 8:00 p.m. CPT start of system maintenance window, 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.**

| Development Focus | Details | Planned or Actual Delivery |
|---|---|---|
| **Enhancements, Features and Bug Fixes** | | |
| Disclosure Form (DF) Enhancement: Make "Upload or Review Documents" button functional regardless of validations | Some values in older, previously submitted DFs don't always meet the field validation requirements for the current Disclosure Forms accepted by the portal. Previously, when navigating to the "Download PDF copies" page for older DFs, users received an error message indicating that one or more uneditable fields required correction, and navigation was blocked. The system has been corrected to allow navigation to this page regardless of validation rules. | December 21, 2023 |
| Add PPA Initial & Final Price/kWh Validations | Field validations were added to the Power Purchase Agreement form questions "Initial PPA price per-kilowatt hour" and "Final PPA price per-kilowatt hour". Validations will not allow values greater than $0.50, to ensure values entered are not misrepresented and entered as dollars. This enhancement also changes question guidance and allows entries in values to the 5th decimal place. These updates effect both the PPA Portal & CSV Disclosure Forms | December 21, 2023 |
| Upgrade PVWatts® from V6 to V8 | This version update upgrades the portal to PVWatts version 8, which includes updating the weather data to 2020 TMY data from the NREL National Solar Radiation Database (NSRDB) for locations covered by the database. | December 21, 2023 |
| Allow AV to download document for all statuses | This enhancement allows AVs to download attached documents in Part I and Part II applications for all project statuses. | December 21, 2023 |
| Community Solar DF: Rate Structure Enhancement | Set payment when Frequency of Payment is not Monthly – This enhancement provides more accurate guidance for Community Solar DF rate and payment information questions, including that "set payment" and "set payment with annual escalation" are monthly. | December 21, 2023 |
| Tab index is incorrect for the project installation section of the DG Lease Disclosure Form | This enhancement updates the tab indexing in the project installation section of the DG Lease Disclosure Forms for simplified keyboard navigation. | December 21, 2023 |
| All DG Disclosure Forms: Jo-Carrol in drop down list | Remove Note/helper text – This enhancement removes unneeded helper text that indicated "Please note that you cannot select Jo-Carroll energy co-op on a DG form" | December 21, 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 |
|---|---|---|---|
| AV Application Stakeholder Feedback | December 8, 2023 | January 11, 2024 | |
| Advance of Capital Evaluation Criteria | October 31, 2023 | November 14, 2023 | Final advance of capital evaluation criteria and rationale were released on December 12, 2023. |
| 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.

- **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.

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