

EXPANDED CONSUMER PROTECTION WORKING GROUP AGENDA

Friday, January 5, 2024

Poll Question Series 1:

Which marketplace participant best describes you?		36 of 57 participated
Approved Vendor	(13/36) 36%	
Designee/Nested Designee	(9/36) 25%	
Consumer	(0/36) 0%	
Government Agency	(8/36) 22%	
Non-Profit Advocacy/Community Group	(5/36) 14%	
Prospective Approved Vendor/Designee	(0/36) 0%	
Other	(1/36) 3%	

TOPIC 1	Illinois Shines Portal Impacts on Revocation of Designee Relationships
BACKGROUND	<p>Both Illinois Shines and Illinois Solar for All require Approved Vendors and Designees (entities acting on behalf of Approved Vendors) to register with the respective programs.</p> <p>Sections 2.A and 2.G of the current 2023 Illinois Shines Program Guidebook discuss these requirements and Section 2.G further explains that the purpose of registration “is to increase Program transparency by creating a searchable database of participating organizations on both the ABP and Illinois Shines websites. Potential customers will be able to verify that an entity representing the Program is indeed a registered participant (and likewise will be able to review if the entity is listed on the complaint or disciplinary databases).”</p> <p>All companies that interact with customers in relation to the Program (including companies that market on behalf of companies that sell solar projects, or subscriptions to community solar projects, that will be submitted to the Program) need to register as a Designee with the Program or become an Approved Vendor.</p> <p>Primarily through the recent Designee renewal process, the Illinois Shines Program Administrator has learned of many discontinued Approved Vendor – Designee and Designee-Nested Designee relationships. In early 2024, the Program Administrator intends to update the Program Portal and the public-facing lists to reflect these severed relationships.</p> <p>With respect to updating relationships in the Portal, the Program Administrator seeks feedback from stakeholders on what should happen with access to existing applications and Disclosure Forms that predated the severed relationship. We hope to learn of any factors we should consider when updating relationships and application access in the Portal.</p>
ISSUES/ QUESTIONS TO	<ul style="list-style-type: none"> • <i>When severing an Approved Vendor-Designee relationship in the Portal, what access to applications and Disclosure Forms do Approved Vendors and</i>

DISCUSS	<p><i>Designees believe that Designees should continue to have after the relationship terminates?</i></p> <ul style="list-style-type: none"> • <i>Other than preventing severed Designees from being able to complete Disclosure Forms or obtain signatures on behalf of their former Approved Vendor, what other restrictions should the Program Administrator consider in the Portal when an Approved Vendor-Designee relationship terminates?</i> • <i>How often do Designees cease working with an Approved Vendor for a period but then later resume that relationship? How should the possibility of relationships resuming impact the permanence of Portal restrictions?</i>
MEETING MINUTES	<p>Stakeholder feedback included:</p> <ul style="list-style-type: none"> • One participant stated that access to Disclosure Forms would no longer be necessary after an Approved Vendor and Designee terminate their relationship and the onus would be on the Approved Vendor to provide Disclosure Forms to the Designee, if necessary. • Multiple participants stated that after an Approved Vendor/Designee relationship has been terminated, it can still be useful for the Designee to have access to the Disclosure Forms created under that relationship in case a customer reaches out to them or if there is a related customer complaint. • One participant outlined that continued access to Disclosure Forms could particularly be helpful in assisting stranded customers if the Approved Vendor stopped working with the Designee and the Designee still needs access to the customers' Disclosure Forms.

TOPIC 2	Potential Process Improvements for Need Info Communications
BACKGROUND	<p>The Program Guidebook for the Illinois Shines Program describes how Approved Vendors must submit project applications for Program Administrator approval before the projects are submitted to the Illinois Commerce Commission (ICC). The Program Guidebook explains that, during its review of project applications, the Program Administrator may “request additional information from the Approved Vendor as needed to verify the submitted information and approve the project.”</p> <p>The Illinois Shines Program Administrator receives regular feedback that Approved Vendors want to be able to see and resolve Need Info requests in the Portal. Currently, Approved Vendors may see in the Portal when an application is in Need Info status; however, they may not see details of the specific Need Info request. In addition, all Need Info requests may currently only be resolved through email.</p> <p>The Illinois Shines Program Administrator is planning for the coming year and seeks feedback from the market on whether incremental steps to move Need Info processes to the Portal would be helpful, understanding that comprehensive Need Info functionality within the Portal will not occur within the next twelve months.</p>

<p>ISSUES/ QUESTIONS TO DISCUSS</p>	<ul style="list-style-type: none"> • <i>Would it be an improvement from the current process is Approved Vendors and Designees could view Need Info notes directly in the Portal, but still were required to respond to Need Info requests via email?</i> • <i>If the Need Info notes were available in the Portal, an AV could potentially view a Need Info note in the Portal before an email was sent explaining the specific Need Info issue. What concerns, if any, do Approved Vendors and Designees have about potential confusion this could cause?</i> • <i>Would a checklist for common Need Info reasons (and how to avoid them) incorporated into the Portal be helpful?</i> <ul style="list-style-type: none"> ○ <i>Which specific Need Info issues do market participants want to make sure the Program Administrator includes in such a checklist?</i>
<p>MEETING MINUTES</p>	<p>Stakeholder feedback included:</p> <ul style="list-style-type: none"> • Several participants agreed that viewing the Need Info prior to receiving an email notice could be helpful. • Several participants agreed a checklist for common Need Info reasons (and how to avoid them) could be helpful. • One participant stated that a spreadsheet report of Need Info requests is more useful than having the Need Info request explained in the portal. • Several participants stated that timestamps for status changes to applications (submission, Need Info, verified, etc.) would be helpful. • Several participants agreed that a list of which utilities provide Net Metering, or a portal validation, would be helpful since one of the common Need Info items is a missing Net Metering Waiver.