



Illinois Shines

Building Our Solar Future

Designee Management Plan

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Designee Management Plans

- Approved Vendors are responsible for managing and actively supervising their Designees (including nested Designees) and ensuring compliance with all Program requirements. It is imperative that Approved Vendors successfully and consistently perform this oversight of their Designees as it is often Designees who have the most direct contact with consumers.
- Every Approved Vendor that works with or uses Designees is required to have and follow a Designee Management Plan.
- Requirements found in Section X.B.1 of the [Consumer Protection Handbook](#).
- Designee Management Plans are required when you begin working with a Designee. If you never work with a Designee, you need not create and maintain such a Plan.
- Approved Vendors must provide the Program Administrator with a copy of its Designee Management Plan(s) upon the Program Administrator's request.



Designee Management Plans

- Currently, Program Administrator requests for Designee Management Plans occur in connection with Designees (or Approved Vendors) receiving a Notice of Potential Violation
- Submission of Plan in any format is acceptable (although most Plans submitted to date are in Word or PDF)
- Common issues in Plans submitted to date:
 - Missing criteria
 - Partially responsive explanations
- Ensure all criteria outlined in Consumer Protection Handbook are included in Plan
- Program Administrator will provide Approved Vendor with an opportunity to cure any deficiencies
 - As always, timely responses to follow-up requests are appreciated and required



Thank you for watching!

For questions or assistance:

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