



Illinois Shines

Building Our Solar Future

Designee Registration and Renewal

Presented By:

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Designee Registration Manager

What is a Designee?



Designee: Third party (i.e., non-Approved Vendor) entities that have direct interaction with end-use customers.

- Ex. installers, entities that perform maintenance and repair, marketing firms, community solar subscriber agents, lead generators, and sales organizations.

All Designees are publicly listed on the [Find a Designee Report](#).



Nested Designee: Designees of Designees are called Nested Designees.

- Nested Designees may hold only Marketing/Sales Designee or Installer Designee roles.

Only Approved Vendors can add Disclosure Form Designees and Community Solar Subscriber Agent Designees directly beneath their account.

Designee Types



Disclosure Form Designee: An entity that the Approved Vendor has designated who is permitted to generate Disclosure Forms on behalf of the Approved Vendor.



Community Solar Subscriber Agent Designee: An entity that the Approved Vendor has designated to manage the community solar subscription information for an Approved Vendor's Community Solar projects.



Marketing or Sales Designee: An entity that the Approved Vendor or Designee has designated to act as a marketing agent and/or customer acquisition agent on behalf of the Approved Vendor or Designee.



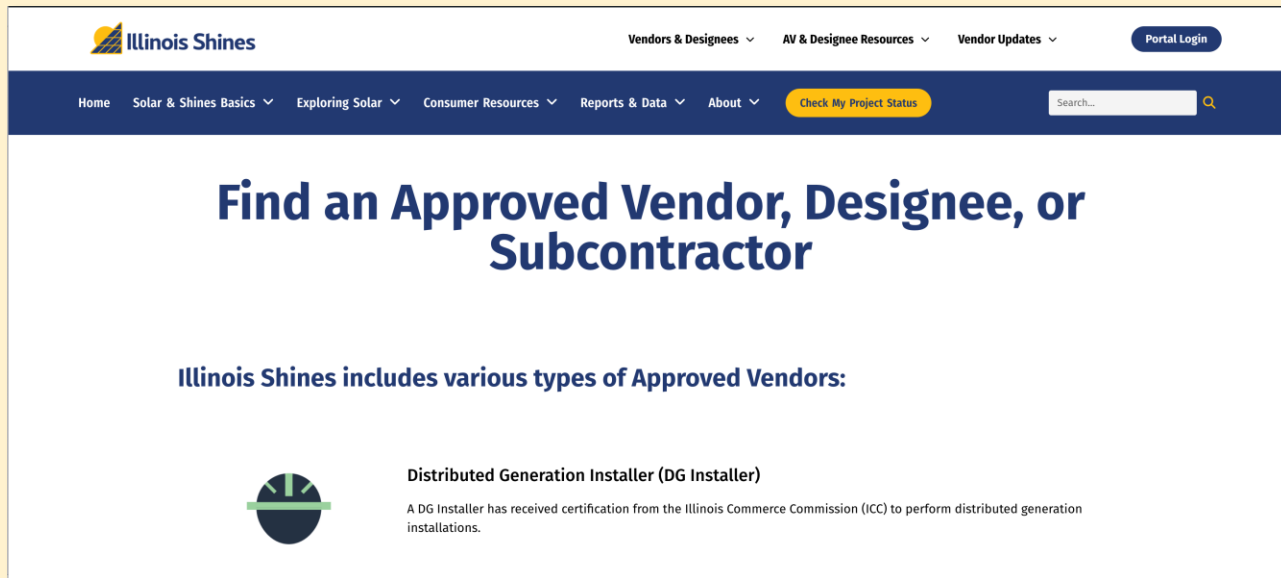
Installer Designee: An entity that the Approved Vendor or Designee has designated to install systems on behalf of the Approved Vendor or Designee.



How To Register as a Designee

1. Identify an Approved Vendor or Designee to work with and register as a Designee under them.

- A list of Approved Vendors and a list of Designees in the Program can be found on the [Find an Approved Vendor, Designee, or Subcontractor](#) webpage.



Identify
Relationship



Complete
Registration Form



Submit Form and
Requested
Documents to
Program
Administrator

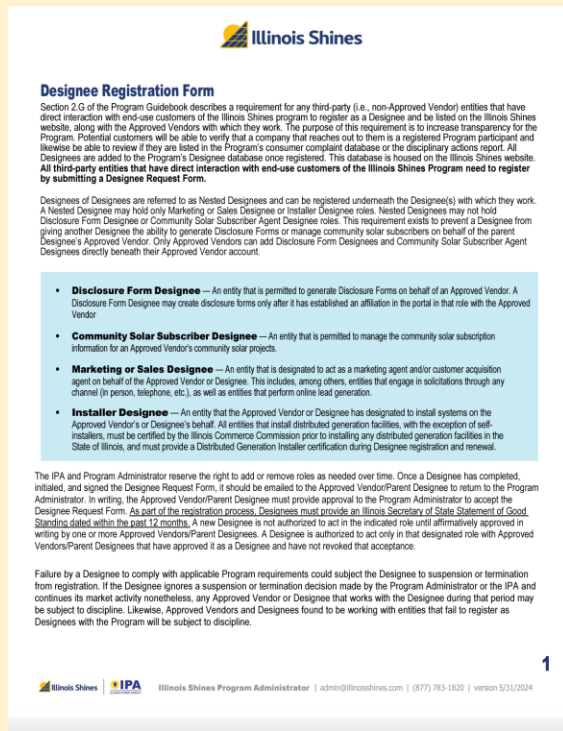
Respond if Additional
Items Requested



How To Register as a Designee

2. Complete the Designee Registration Form

- Complete "Designee/Nested Designee Information."
- Initial and sign attestations.



Designee Registration Form

Section 2.G of the Program Guidebook describes a requirement for any third-party (i.e., non-Approved Vendor) entities that have direct interaction with end-use customers of the Illinois Shines program to register as a Designee and be listed on the Illinois Shines website, along with the Approved Vendors with which they work. The purpose of this requirement is to increase transparency for the Program. Potential customers will be able to verify that a company that reaches out to them is a registered Program participant and likewise be able to review if they are listed in the Program's consumer complaint database or the disciplinary actions report. All Designees are added to the Program's Designee database once registered. This database is housed on the Illinois Shines website. All third-party entities that have direct interaction with end-use customers of the Illinois Shines Program need to register by submitting a Designee Request Form.

Designees of Designees are referred to as Nested Designees and can be registered underneath the Designee(s) with which they work. A Nested Designee may hold only Marketing or Sales Designee or Installer Designee roles. Nested Designees may not hold Disclosure Form Designee or Community Solar Subscriber Agent Designee roles. This requirement exists to prevent a Designee from giving another Designee the ability to generate Disclosure Forms or manage community solar subscribers on behalf of the parent Designee's Approved Vendor. Only Approved Vendors can add Disclosure Form Designees and Community Solar Subscriber Agent Designees directly beneath their Approved Vendor account.

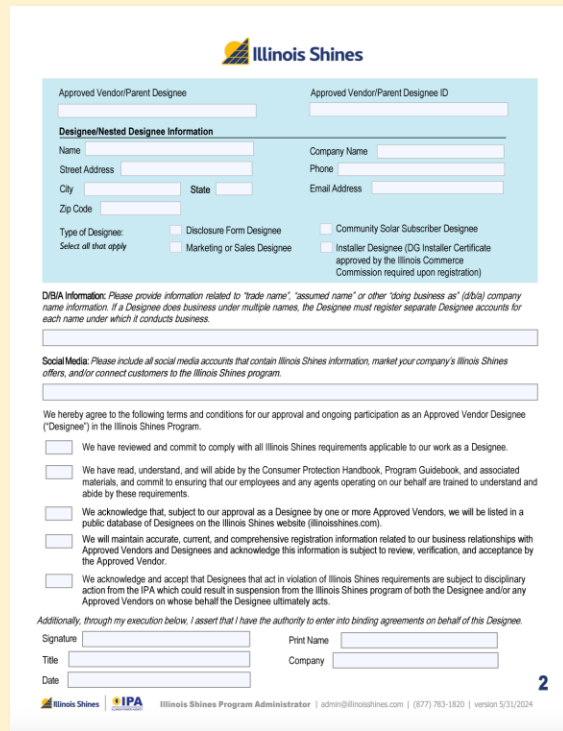
- **Disclosure Form Designee** — An entity that is permitted to generate Disclosure Forms on behalf of an Approved Vendor. A Disclosure Form Designee may create disclosure forms only after it has established an affiliation in the portal in that role with the Approved Vendor.
- **Community Solar Subscriber Designee** — An entity that is permitted to manage the community solar subscription information for an Approved Vendor's community solar projects.
- **Marketing or Sales Designee** — An entity that is designated to act as a marketing agent and/or customer acquisition agent on behalf of the Approved Vendor or Designee. This includes, among others, entities that engage in solicitations through any channel (in person, telephone, etc.), as well as entities that perform online lead generation.
- **Installer Designee** — An entity that the Approved Vendor or Designee has designated to install systems on the Approved Vendor's or Designee's behalf. All entities that install distributed generation facilities, with the exception of self-installers, must be certified by the Illinois Commerce Commission prior to installing any distributed generation facilities in the State of Illinois, and must provide a Distributed Generation Installer certification during Designee registration and renewal.

The IPA and Program Administrator reserve the right to add or remove roles as needed over time. Once a Designee has completed, initiated, and signed the Designee Request Form, it should be emailed to the Approved Vendor/Parent Designee to return to the Program Administrator. In writing, the Approved Vendor/Parent Designee must provide approval to the Program Administrator to accept the Designee Request Form. As part of the registration process, Designees must provide an Illinois Secretary of State Statement of Good Standing dated within the past 12 months. A new Designee is not authorized to act in the indicated role until affirmatively approved in writing by one or more Approved Vendor/Parent Designees. A Designee is authorized to act only in that designated role with Approved Vendors/Parent Designees that have approved it as a Designee and have not revoked that acceptance.

Failure by a Designee to comply with applicable Program requirements could subject the Designee to suspension or termination from registration. If the Designee ignores a suspension or termination decision made by the Program Administrator or the IPA and continues its market activity nonetheless, any Approved Vendor or Designee that works with the Designee during that period may be subject to discipline. Likewise, Approved Vendors and Designees found to be working with entities that fail to register as Designees with the Program will be subject to discipline.

Illinois Shines | IPA | Illinois Shines Program Administrator | admin@illinoisshines.com | (877) 783-1820 | version 5/31/2024

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Designee Registration Form

Approved Vendor/Parent Designee: _____ Approved Vendor/Parent Designee ID: _____

Designee/Nested Designee Information

Name: _____ Company Name: _____
Street Address: _____ Phone: _____
City: _____ State: _____ Email Address: _____
Zip Code: _____

Type of Designee: Disclosure Form Designee Community Solar Subscriber Designee
Select all that apply: Marketing or Sales Designee Installer Designee (DG Installer Certificate approved by the Illinois Commerce Commission required upon registration)

DBIA Information: Please provide information related to "trade name", "assumed name" or other "doing business as" (d/b/a) company name information. If a Designee does business under multiple names, the Designee must register separate Designee accounts for each name under which it conducts business.

Social Media: Please include all social media accounts that contain Illinois Shines information, market your company's Illinois Shines offers, and/or connect customers to the Illinois Shines program.

We hereby agree to the following terms and conditions for our approval and ongoing participation as an Approved Vendor Designee ("Designee") in the Illinois Shines Program.

We have reviewed and commit to comply with all Illinois Shines requirements applicable to our work as a Designee.

We have read, understand, and will abide by the Consumer Protection Handbook, Program Guidebook, and associated materials, and commit to ensuring that our employees and any agents operating on our behalf are trained to understand and abide by these requirements.

We acknowledge that, subject to our approval as a Designee by one or more Approved Vendors, we will be listed in a public database of Designees on the Illinois Shines website (illinoisshines.com).

We will maintain accurate, current, and comprehensive registration information related to our business relationships with Approved Vendors and Designees and acknowledge this information is subject to review, verification, and acceptance by the Approved Vendor.

We acknowledge and accept that Designees that act in violation of Illinois Shines requirements are subject to disciplinary action from the IPA which could result in suspension from the Illinois Shines program of both the Designee and/or any Approved Vendors on whose behalf the Designee ultimately acts.

Additionally, through my execution below, I assert that I have the authority to enter into binding agreements on behalf of this Designee.

Signature: _____ Print Name: _____
Title: _____ Company: _____
Date: _____

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Identify Relationship



Complete Registration Form



Submit Form and Requested Documents to Program Administrator

Respond if Additional Items Requested



The form can be found on the Become an AV or Designee page on the website

How to Register as a Designee

3. Submit Registration Form to admin@illinoisshines.com with the following required items:

- Illinois Secretary of State Statement of Good Standing dated within the past 12 months.
- Minimum Equity Standard Compliance Plan or an Equity Eligible Contractor ("EEC") Application.
- **Distributed Generation Installer Certificate with the Illinois Commerce Commission (If applicable).**
 - Only required if you are registering as an Installer Designee.

Please Note: Form must be submitted by the Approved Vendor/Designee your company is registering under, authorizing the Program Administrator to process the request. Designees are not permitted to self-register.

Identify
Relationship



Complete
Registration Form



Submit Form and
Requested
Documents to
Program
Administrator

Respond if Additional
Items Requested



Application Review and Approval

Illinois Shines Program Administrator team will intake and process the Designee registration request and will follow up as needed.

Application review typically takes two to four weeks.

- If items are not submitted, the review process may take longer.
- Once the application is processed, you will receive a confirmation email from admin@illinoisshines.com that you have been registered as a Designee.

Identify
Relationship



Complete
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Designee Renewal Requirements

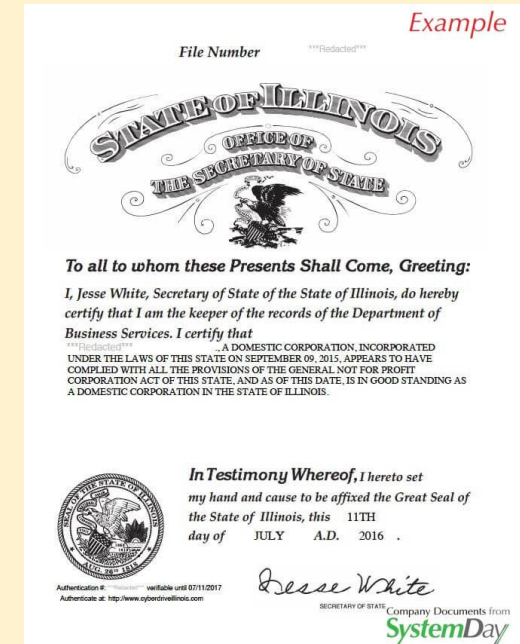


Designee Renewal

Designees are required to renew their status in the Program annually.

Designees will submit a Designee Renewal Microsoft Form for that Program Year, and upload the following supplemental documents in their Designee SharePoint Folders:

- Illinois Secretary of State Statement of Good Standing dated within the past 12 months.
- Training materials and/or training certificates of completion showing that your agents and/or staff have been trained in accordance with Program requirements.



Thank you for watching!

For questions or assistance:

Email: admin@illinoisshines.com

Phone Number: (877) 783-1820

