

Community Solar Subscriber Management Portal Feature

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Presented by Energy Solutions



Today's Presenters



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Agenda

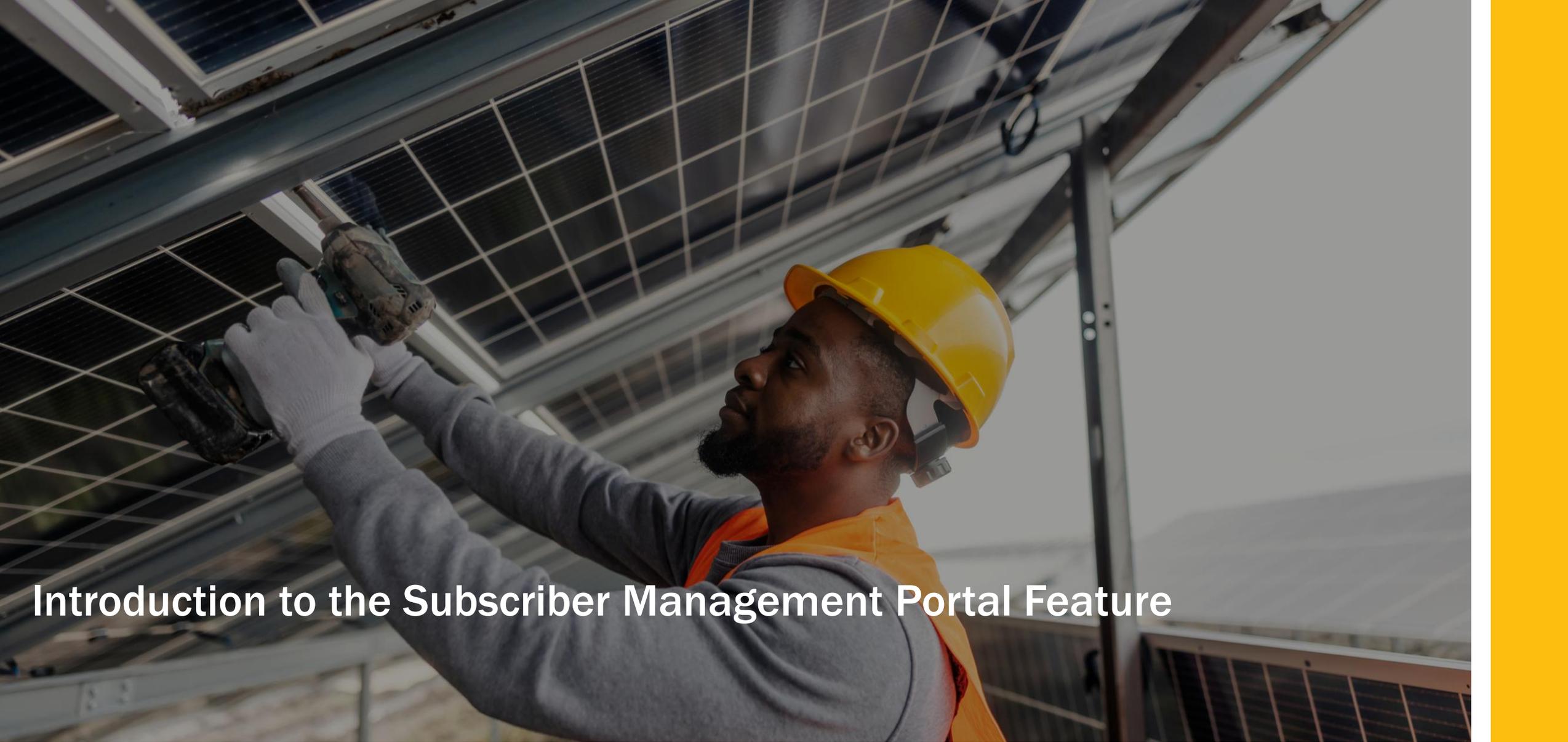
1 Introduction to the Subscriber Management Portal Feature

2 Live Demo

3 Program Support & Resources

4 Q&A





Introduction to the Subscriber Management Portal Feature

Background



What is the Subscriber Management Portal Feature?

Feature that allows management of Community Solar subscribers to move from SharePoint to the Illinois Shines Portal, effectively centralizing access and improving subscription management permissions.

AVs and Designees will be able to:

- View and manage subscriptions
- View unsubscribed completed Disclosure Forms
- Import and export subscription data
- Manage project permissions and assign Designees to projects



What are the benefits?

- Increased process efficiency
- Data centralization and standardization
- Self-service permissions
- Any-time access
- Subscription history tracking



Market Input and Collaboration



Subscriber Management Working Group

January 2025: The Program Administrator successfully held a one-hour online Working Group session that generated strong participation, and valuable stakeholder perspectives and insights supporting further development of the subscriber management functionality.

April 2025: The Program Administrator sent a follow-up survey for additional input and feedback on the design of the Portal.



Portal Testing

January 2026: Several AV/Designees from the Working Group participated in a live demo and Portal testing session for the Subscriber Management Portal Feature in a test server.



Portal Feature Go-Live



March 2026

What's changing?

- Subscriber data will move from SharePoint to the Illinois Shines Portal in March of 2026.

Approved Vendors will be responsible for:

- Historical subscriber data reporting
- Completing subscriber verifications at different intervals throughout the REC contract (Part II, Quarterly Reports, Semi-Annual Verifications, Annual Reports)





Recorded Demo

Subscriber Management Portal Feature

Permissions Overview



High Level Overview of Permissions

Visibility of Records:

- Visibility is based on the AV who owns the project and any Designee delegated to manage it
- Generally, an AV can view anything regarding Disclosure Forms or subscriptions that are associated with their projects
- AVs can have visibility to Disclosure Form or subscription records that they do not own, only if the record is associated to a project that they do own
- Designees can see any Disclosure Form and subscription records for projects for which they have been delegated to manage, but PII is redacted on specific Disclosure Forms that are not owned by them

Editing of Records:

- Ability to manage/edit records is based on who "owns" the Disclosure Form, which is the AV and/or Designee ID on the Disclosure Form.
- The "owner" defaults to the AV/Designee that is listed on the Disclosure Form when it is initially created
- Designees will only be able "manage" records for projects for which they are delegated to manage, and for Disclosure Forms which they own

Disclosure Form Transfers:

- If an AV or Designee needs to view a Disclosure Form that initially listed an AV ID or Designee ID different than their own, a Disclosure Form transfer would need to be requested.
- A Disclosure Form transfer changes the "owner" of the Disclosure Form

Redacted Records

Disclosure Form ID	Disclosure Form Status	Subscriber Name	Subscriber Street	Subscriber Apt/Suite	Subscriber City	Subscriber Zip
32896	Completed	Jane Doe	123 Main Street	Apt 123	Chicago	60007
32990	Completed					

Unredacted record example

Redacted record example

Subscriber Management Portal Feature

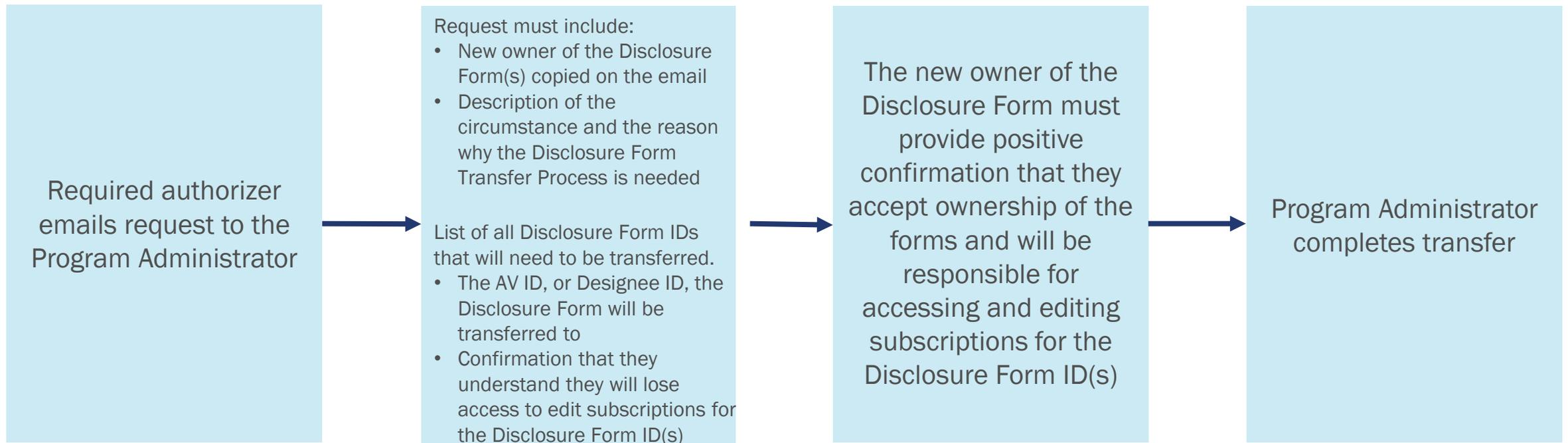
Disclosure Form Transfer Process



Disclosure Form Transfer Process

In the case that an AV or Designee needs to view a Disclosure Form that initially listed an AV ID or Designee ID different than their own, a Disclosure Form transfer must be requested to change the Disclosure Form "owner."

The required authorizer varies based on how the Disclosure Form was originally generated and if it has been subscribed. Details are included in the Training Guide.



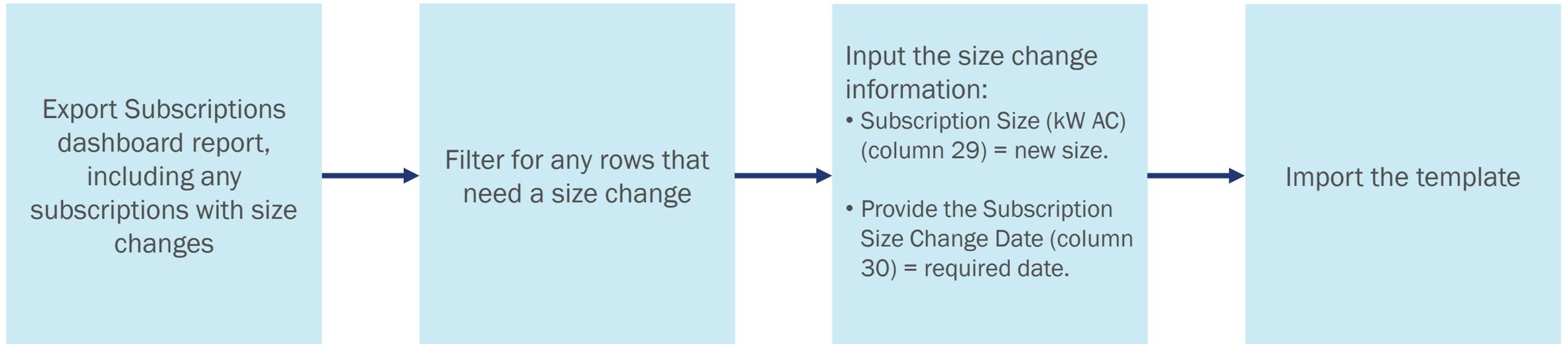
Subscriber Management Portal Feature

Common Actions



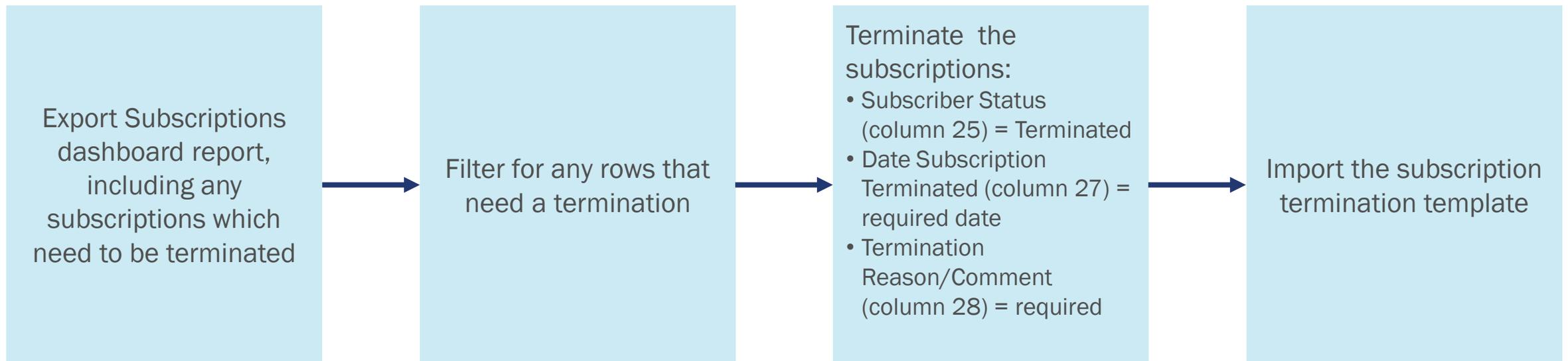
Subscription size changes

Suggested workflow:



Terminating a subscriber

Suggested workflow:





Demo Q&A



Program Support & Resources

Program Support & Resources

Program Administrator Support:

- General Admin Support: admin@illinoisshines.com
 - Used for general Program questions and support navigating the Portal, troubleshooting, bugs etc.
- Sector Strategists: communitysolar@illinoisshines.com, eec@illinoisshines.com, schools@illinoisshines.com
 - Used for specific questions on TCS, CDCS, EEC CS, and Public Schools CS categories in the Program.
- Weekly Office Hours (Zoom) Wednesdays at 10am CST
 - Used for general Program questions and support.

Program Resources:

- Subscriber Management Portal Feature Training Guide
- Subscriber Management Portal Feature Webinar slides and recording
 - Available at the Program website following the webinar





General Q&A

Thank you!

