

Subscriber Management Portal Feature Training Guide

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Introduction to the Subscriber Management Portal Feature

What is the Subscriber Management Portal Feature?

The Program Administrator developed a new Subscriber Management feature which will be added to the Illinois Shines portal. This feature will allow management of Community Solar (CS) subscribers to move from SharePoint to the Illinois Shines portal, effectively centralizing access and increasing subscription management permissions for Approved Vendors (AVs) and Designees. This feature will bring all current subscriber data into the portal and create relationships between records, providing users with two dashboards: the Subscriptions Dashboard and the Projects Subscriptions Summary.

AVs and Designees will have the ability to:

- View subscriptions
- Manage subscriptions
- View projects
- View unsubscribed completed Disclosure Forms (DFs)
- Import subscription data
- Export subscription data

AVs will also have the ability to manage project permissions for their Designees.

The initial release of this feature will only include enough core functionality to accomplish subscription management tasks and reflect Minimal Viable Product requirements.

Viewing and Utilizing the Project Subscriptions Summary

The Project Subscriptions Summary page enables AVs and Designees to view and export all CS projects with a Batch Status of ICC Pending or ICC Approved, along with unverified details, and subscription totals for each project. Designees will be able to view projects they are delegated to manage.

Note: The subscription rates here are unconfirmed by the Program Administrator's subscriber verification process. Utility matching, small subscriber, and other project specific requirements, such as local or school subscriber requirements, will be verified via an off-platform process to confirm final subscription rates.

To access the “Project Subscriptions Summary” page and view a list of all CS projects, navigate to the “CS Subscription Management” tab in the portal and select “Projects”.

To export a CSV file of all, or a filtered set of CS projects, select “Export”.

Viewing and Utilizing the Subscriptions Dashboard

The Subscription Dashboard enables AVs and Designees to view, import, and export CS project subscriptions, DFs, and unsubscribed completed DFs available for subscription, so data can be available for verification events and subscription imports.

To access the Subscription Dashboard and view a list of all CS project subscriptions and DFs, navigate to the “CS Subscription Management” tab of the portal and then select “Subscriptions”.

To view completed unsubscribed DFs, select the toggle labeled “Include Unsubscribed DFs”. The page may take a few moments to load.

To export a CSV file of all or a filtered set of CS project subscriptions, subscription details, and DF details, select “Export”. The page may take a few moments to load. To view downloading progress bar, scroll to the center of the screen.

The Disclosure Form Dashboard enables AVs and Designees to view DFs that are unsubscribed to a project, so that they can export a report and subscribe these DFs to a project via the import process.

To view whether a DF is active or archived in the Portal or export file, locate the column titled “Is DF Archived,” which will indicate “Yes” or “No”.

Managing Subscriptions

To export the list of unsubscribed DFs, select “Export”. To view downloading progress bar, scroll to the center of the screen.

To access this dashboard and view the list of DFs, navigate to the “CS Subscriber Management” tab of the portal and then select “Disclosure Forms”.

Approved Vendor ID	Designee ID on DF	Disclosur	Subscriber Street	Subscriber Apt/Suite	Subscriber City	Subscriber Zip
Confidential	Confidential	Submitted	Confidential	Confidential	Confidential	11111
Confidential	Confidential	Submitted	Confidential	Confidential	Confidential	11111
Confidential	Confidential	Submitted	Confidential	Confidential	Confidential	11111
Confidential	Confidential	Submitted	Confidential	Confidential	Confidential	11111
Confidential	Confidential	Submitted	Confidential	Confidential	Confidential	11111
Confidential	Confidential	Submitted	Confidential	Confidential	Confidential	11111
Confidential	Confidential	Submitted	Confidential	Confidential	Confidential	11111

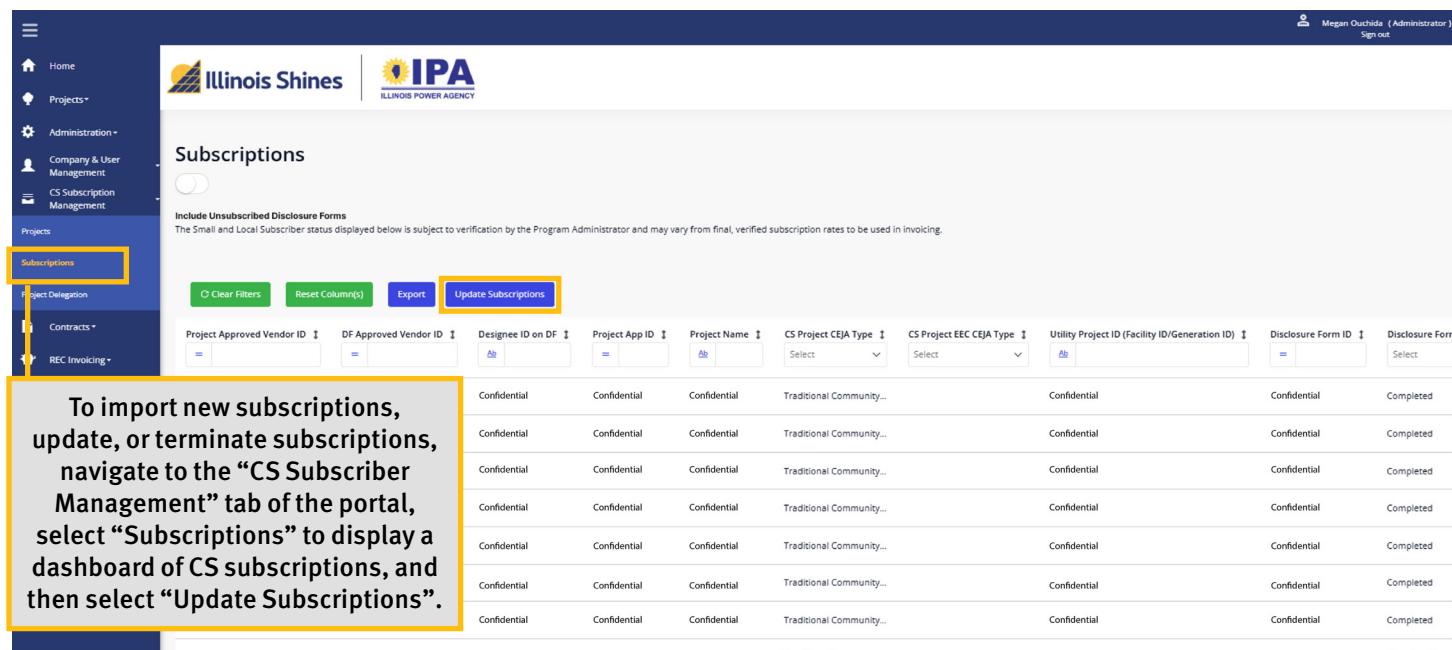
Viewing Subscriptions

This dashboard includes subscription details, which are sortable, filterable, and searchable.

To view subscriptions, navigate to the “CS Subscriber Management” tab of the portal and select “Subscriptions”.

Project Approved Vendor ID	DF Approved Vendor ID	Designee ID on DF	Project App ID	Project Name	Disclosure Form ID	Disclosure Form
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Completed
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Completed
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Completed
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Completed
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Completed
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Completed
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Completed

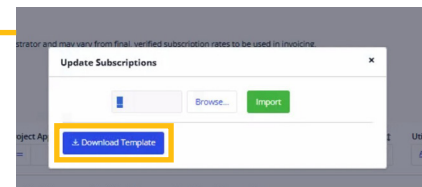
Importing New Subscriptions, Updating Existing Subscriptions, and Terminating Subscriptions



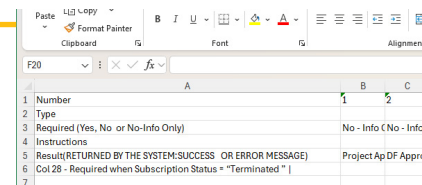
To import new subscriptions, update, or terminate subscriptions, navigate to the “CS Subscriber Management” tab of the portal, select “Subscriptions” to display a dashboard of CS subscriptions, and then select “Update Subscriptions”.

Project Approved Vendor ID	DF Approved Vendor ID	Designee ID on DF	Project App ID	Project Name	CS Project CEJA Type	CS Project EEC CEJA Type	Utility Project ID (Facility ID/Generation ID)	Disclosure Form ID	Disclosure Form
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Confidential	Completed		
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Confidential	Completed		
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Confidential	Completed		
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Confidential	Completed		
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Confidential	Completed		
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Confidential	Completed		
Confidential	Confidential	Confidential	Confidential	Traditional Community...	Confidential	Confidential	Completed		

Once “Update Subscriptions” is selected, a “Download Template” pop-up will appear. The import template and export template are structured in the same way.



- This template will need to be filled out according to the instructions, with the ability to add new subscriptions, update subscriptions, or terminate subscriptions.

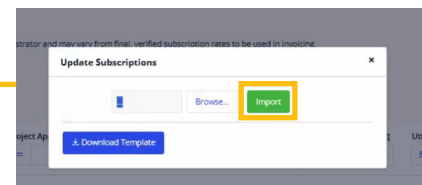


Number	Type	Required (Yes, No or No-Info Only)	Instructions	Result (RETURNED BY THE SYSTEM: SUCCESS OR ERROR MESSAGE)	Project App DF Approv
1					
2					
3					
4					
5					
6					
7					

- The template will indicate which fields are required for a successful submission. The template will return an “Error” message if fields are incorrectly populated or missing.

The export file from the Unsubscribed Disclosure Form Dashboard may also be prepared to match this template

Upload the template by selecting “Import”.



- Once the file has been uploaded, a response file will be made available.
- The response file will include either a “Success” or “Error” message.

Record Type	Definition
Import	The combination of Project App ID and Disclosure Form ID does NOT already exist in the Subscription table.
Updated	The combination of Project App ID and Disclosure Form ID already exist in the Subscription table.
Termination	The combination of Project App ID and Disclosure Form ID already exists in the Subscription table and the status is going from “ Active ” to “ Terminated. ” Other data points may also be updated.
Reactivation	The combination of Project App ID and Disclosure Form ID already exists in the Subscription table and the status is going from “ Terminated ” to “ Active. ” Other data points may also be updated.

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 see anything about DFs or subscriptions that are associated with their projects.
- AVs can have visibility to DF or subscription records that they do not own, but the record must be associated to a project that they do own.
- Designees can see any DF and subscription records for projects for which they have been delegated to manage, but personally identifiable information (PII) is redacted on specific DFs that are not owned by them.

Editing of Records

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

Disclosure Form Transfers

- In the case that an AV or Designee needs to view a DF that initially listed an AV ID or Designee ID different than their own, a DF transfer would need to be requested.
- A DF transfer changes the “owner” of the DF.

The process to request a DF transfer is outlined below:

- The AV or Designee who is the required authorizer must email the Program Administrator requesting a DF Transfer. The required authorizer is outlined in the table below.
- The AV or Designee who is the required authorizer must also copy the AV or Designee who will be the new owner of the DF(s). In the email, provide a thorough description of the circumstance and the reason why the DF Transfer Process is needed.
- Provide a list of all DF IDs that will need to be transferred.
- Provide the AV ID, or Designee ID, the DF will be transferred to.

- The required authorizer must provide positive confirmation that they understand they will lose access to edit subscriptions for the DF ID(s).
- The AV or Designee who will be the new intended owner of the DF must provide positive confirmation that they accept to be the new owner of the forms and will be responsible for accessing and editing subscriptions for the DF ID(s).

AV DF Transfers	Authorized Requester
AV on a project changes due to batch or contract assignment	No request – Program Administrator initiates transfer
AV needs to change from 99999/TBD to a specified AV for unsubscribed forms	Designee listed on form
AV needs to change from one specified AV to either 1) another specified AV or 2) 99999/TBD on an unsubscribed form (not due to batch or contract assignment)	AV listed on the form
AV needs to change for subscribed forms (not due to batch or contract assignment)	AV of the project to which the DF is subscribed

Designee DF Transfers	Authorized Requester
Designee needs to change on unsubscribed form	Designee listed on form
Designee needs to change on subscribed form	AV of the project to which the DF is subscribed

Ability to View Records – Approved Vendors

Disclosure Forms Dashboard

- Able to see & export CS DFs in any status, that are not associated with an “active” subscription, that list an AV ID associated with the logged in user.*
- Will not see any TBD/99999 forms, will see any form that lists their AV ID.*

**If necessary, a DF transfer can change the AV/D ID on the DF.*

Projects Dashboard

- Will see any CS project that is under the AV ID associated with the logged in user.
- Project totals will include subscription sizes from any records.

Subscriptions Dashboard

- Able to see & export unsubscribed DFs that list an AV ID associated with the logged in user.*
- Able to see any subscription record (regardless of DF owner) to projects that are under the AV ID associated with the logged in user.
- The AV ID listed on the DF is not taken into consideration for ability to view a record.

**If necessary, a DF transfer can change the AV/D ID on the DF.*

Project Delegation

- AV's can self service to delegate projects to a designee and the logged in user will see any CS project that is under all AV ID(s) associated with the logged in user.
- After clicking into a project, the list of Designees that show can be added/removed to projects. The list of available Designees will be any Designee associated with the AV under Company & User Management > Associated Designees > Active Community Solar Subscriber Designee.

Ability to View Records – Designees

Disclosure Forms Dashboard

- Able to see & export CS DFs in any status, that are not associated with an “active” subscription, that list a Designee ID associated with the logged in user.*
- Will see any TBD/99999 forms, will not see forms that don't list their Designee ID.*

Projects Dashboard

- Will see any CS project that they are delegated to manage.
- Project totals will include subscription sizes from any records, even records that the logged in user does not “own” (i.e. records from other Designees).

Subscriptions Dashboard

- Able to see & export unsubscribed DFs that list a designee ID associated with the logged in user.*
- The Designee ID listed on the DF is not taken into consideration for ability to view a record.
- Able to see any subscription record (regardless of DF owner) to projects that the designee is delegated to manage.
- Columns with PII will be redacted for DFs not owned by the Designee.

**If necessary, a DF transfer can change the AV/D ID on the DF*

Project Delegation

- Designees will see this screen, but no projects will be listed.
- If a user is a dual AV/D user, the Project Delegation info on previous slide will apply.

Ability to Manage Records – Approved Vendors

Subscriptions Dashboard

- Able to “manage” any DF that list an AV ID associated with the logged in user.*
- Cannot manage TBD/99999 forms.*
- Cannot “manage” DFs that were created under a different AV ID (i.e. in the case of an assignment).*

**If necessary, a DF transfer can change the AV/D ID on the DF*

- AVs are able to manage Designee permissions for any of their projects.

Subscriptions Dashboard

- *If necessary, a DF transfer can change the AV/D ID on the DF*

- Designees are not able to manage Designee permissions.

AVs can manage which Designees can access subscriptions for a project.

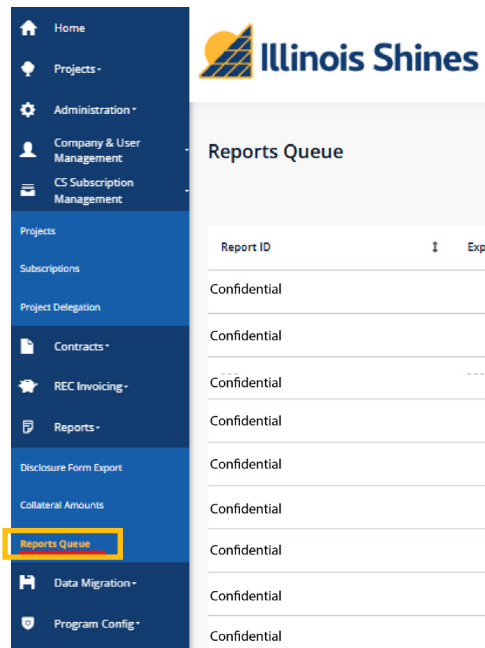
Designees will be able to view and export all projects with a Batch Status of ICC Pending or ICC Approved, along with unverified details, and subscription totals for each project.



 Illinois Shines Program Administrator | admin@illinoisshines.com | (877) 783-1820
 

Reports Queue

You can access the Reports Queue, where subscription exports are temporarily saved, by navigating to Reports and selecting “Report Queue.”



Import Error Codes

When updating subscriptions in the Portal using the import function, imported data will need to meet certain validation requirements in order to successfully update. If these validation requirements are not met, the user will receive an error message under the column labeled “RETURNED BY THE SYSTEM” in the Response File, indicating the specific import error.

Import errors refer to specific rows. If you receive an error message, it means the import was successful for all rows except the row or rows causing the error. To correct the error, a new import with valid information will be required.

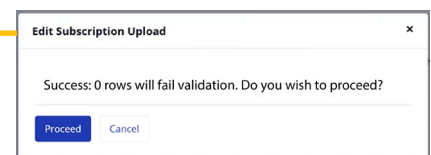
Below are details outlining what to expect if an import error occurs:

After importing a file, a popup window will appear, indicating the number of rows that failed validation.

If selecting “Proceed”

If no validation errors occurred during import, the pop-up window will indicate that zero rows are expected to fail validation.

- If the user selects “Proceed”, the entire file will be imported successfully.



- If the user selects “Cancel”, the import process will be cancelled and no data will be imported.

If a validation error occurs, the pop-up window will indicate how many rows are expected to fail validation and will not be imported.

- If the user selects “Proceed,” then all rows of data in the file that do not fail validation will be imported.

After clicking “Proceed,” a pop-up will appear.

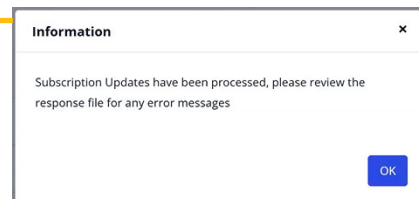
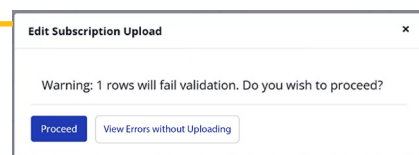
If selecting “View Errors without Uploading”

If the user selects “View Errors without Uploading,” then no rows of data will be imported and a Response File will begin downloading. The Response File will show, in the first column, all validation errors for rows of data that have validation errors.

- To correct errors encountered during a data import, a new import with valid information will be required.

Below is an Error Code Lookup Table, which provides guidance on error messages the user may come across while importing:

Error Message	Description and Solution
Error: You are not authorized to manage subscribers for this Project	If logged in as an AV, the AV is trying to add subscriptions to a project that is currently owned by a different AV ID. If logged in as a Designee, the Designee is not delegated to manage the project. The AV will need to assign the Designee to manage the project under “Project Delegation.”
Error: You are not authorized to apply this Disclosure Form	This means that the logged in user does not match the AV or Designee that “owns” the DF, and therefore cannot be subscribed by the logged in user. The Subscription Dashboard will show the AV/D that “owns” the DF in the “DF Approved Vendor ID” or “Designee ID on DF” column. A DF transfer may need to occur to give the correct entity “ownership” of the DF.
Error: Project must be a CS project	The AV or Designee is trying to import a project that is not a Community Solar project. Check the project ID and try again.
Error: Project must be submitted to ICC before uploading subscriptions	Project must have an ICC Pending or ICC Approved status in order to upload. Try again once the project is in ICC Pending or ICC Approved status.
Error: Disclosure Form must be signed	The DF must be in a “Completed” status to be eligible to use for subscriptions. In order for a DF to be in “Completed” status, it must be signed.
Error: CDCS Projects can only be subscribed to the Project specified on the Disclosure Form	A new DF must be generated which specifies the project ID of the DF being subscribed.
Error: This Disclosure Form is not owned by project owner	The AV ID that “owns” the form does not match the AV ID associated with the project, which inhibits import capabilities. If applicable, the AV/D will need to contact the Program Administrator to initiate a DF transfer. This validation does not apply to “TBD” DFs that list AV 99999.



Error Message	Description and Solution
Error: This Disclosure Form can only be assigned by Designee <Designee ID> <Designee Name>	For “TBD” DFs that list AV 99999, the Designee ID of the logged in user must match the Designee ID that “owns” the form to be able to import. A DF transfer may be necessary to allow the subscription import.
Error: Disclosure Form is already in use on an active subscription	A DF ID can only be used on one active subscription at a time. The existing subscription must first be terminated, or a new DF must be generated and signed.

Troubleshooting

This section is designed to assist you in resolving common issues that may arise while navigating the Subscriber Management Portal Feature. If you encounter difficulties or have questions, please refer to the following troubleshooting solutions, where common problems and their resolutions have been outlined for your convenience:

Approved Vendors:

Topic	Question	Issue	Solution
Designating a Designee	While designating a Designee, why can't I locate a particular Designee in the list of Designees?	The Designee has not yet been assigned the subscriber management role in Designee Management.	Please contact the Program Administrator to register a new Community Solar Subscriber Designee.
Subscription Dashboard	Why am I seeing subscription/DF records that list a different AV ID?	The project may have been assigned, and the DFs may still need to be transferred in order for the correct AV ID to be displayed.	Please contact the Program Administrator to initiate a DF transfer.
Disclosure Forms	Why can't I view a particular DF in the Subscriptions Dashboard?	Possible causes: The DF is not completed.	The DF will need to be moved to Completed status prior to showing up in the Subscriptions Dashboard.
Importing Subscriptions	Why am I getting the message: “An error occurred, please contact your system administrator.”	Possible causes: - The import template could be in the wrong format. - The Part II Application may need a Nameplate Capacity entered.	Please ensure you're using the correct template, downloaded from the Portal, and no columns or rows have been inadvertently deleted/moved.

Designees

Topic	Question	Issue	Solution
Disclosure Forms	Why can't I view a particular DF in the Subscriptions Dashboard?	Possible causes: - The AV has not designated you as a Designee to the project. - The DF is not completed.	- The AV will need to designate a Designee to the project under Project Delegation. - The DF will need to be moved to completed status prior to showing up in the Subscriptions Dashboard.

Topic	Question	Issue	Solution
Disclosure Forms	Why are there empty columns showing on some DFs in the Subscriptions Dashboard?	DF information lists Personally Identifiable Information (PII) that is redacted from users other than the “owner” of the DF.	If applicable, a DF transfer could be requested. Otherwise, PII will not be made visible.
Project Subscriptions Summary	Why can't I see a particular project in the Project Subscriptions Summary?	- The project must be in an ICC Pending or ICC Approved batch. - The Designee must be delegated to manage the project.	- Wait for the project to become ICC Pending or ICC Approved - The AV will need to designate a Designee to the project under Project Delegation.

Approved Vendors and Designees:

Topic	Question	Issue	Solution
Disclosure Forms	How do I manage a DF that initially listed an AV ID or Designee ID different than my own?	A DF Transfer is required.	The AV/D will need to submit a DF Transfer Request to the Program Administrator.
CS Subscription Management Menu	What if I don't have the “CS Subscription Management Menu” in the left hand navigation pane when I log into the portal?	You may not have been granted the proper access to view this section.	Please reach out to the Program Administrator to grant access.

If further assistance is needed, please contact Customer Support at admin@illinoisshines.com or (877) 783-1820.

Appendix A: Required Validations

Below is a table of Required Validations for subscription import:

Field	Requirement
- Project App ID - Disclosure Form ID - Subscriber Status - Subscription Size (kW AC) - Subscriber Type - Last 5 of Choice ID (ComEd) or Subscriber ID Number (Ameren) - Date Subscriber Sent to Utility	Always Required
Date Subscription Terminated	Required when Subscription Status = “Terminated” A Date Subscription Terminated must be: - After 1/1/2018 - On or after “Date Subscriber Sent to Utility” - On or before today's date (cannot be a future date) - Date format: mm/dd/yyyy
Terminate Reason/Comment	Required when Subscription Status = “Terminated.” Cannot exceed 500 characters.

Field	Requirement
Subscription Size	Must be greater than or equal to .2 kW and have up to 3 decimal places
Subscription Size Effective Date	Required when Subscription Size (kW AC) is updated to a new value. Date format: mm/dd/yyyy
Subscriber Type	Allowed values (must match exactly): • Residential • Small Commercial • Large Commercial/Industrial • Government • Non-Profit
Last 5 of Choice ID (ComEd) or Subscriber Identification Number (Ameren) or Member Meter Number (Jo-Carroll)	Always required, must be a maximum of 5 numeric digits. If a value is imported that is fewer than 5 digits, leading zeroes will be added upon import (i.e 123 will be imported as 00123).
Date Subscriber Send to Utility	Always required, date format mm/dd/yyyy

Field	Requirement
Is Subscriber Local	Required only for CDCS Projects or EEC Projects with CDCS Subtype; allowed values (case sensitive): • Yes • No
Subscriber County	Required only for CDCS Projects or EEC Projects with CDCS Subtype; County name must match Appendix B: Counties List.
How was County Identified	Required only for CDCS Projects or EEC Projects with CDCS Subtype; cannot exceed 500 characters

Appendix B: Counties List

For CDCS projects, the county specified must match the Counties List:

A

Adams County
Alexander County

B

Bond County
Boone County
Brown County
Bureau County

D

De Witt County
DeKalb County
Douglas County
DuPage County

E

Edgar County
Edwards County
Effingham County

H

Hamilton County
Hancock County
Hardin County
Henderson County
Henry County

I

Iroquois County

J

Jackson County
Jasper County
Jefferson County
Jersey County
Jo Daviess County
Johnson County

K

Kane County
Kankakee County
Kendall County
Knox County