Questions & Answers from February 26, 2026 Community Solar Subscriber Management Portal Feature Webinar

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Import Template

What are the options for Termination Reason? Is this a free entry field?

- Termination Reason is a free-text field with a 500-character limit, so any description can be input.

Most of the columns appear to be empty in the examples. How do you know which columns need to be populated in the context of subscription management?

- The import template has several column headers. One of the header rows gives instructions on whether or not the field is required to be populated for import, and if so, under what conditions. Another gives instructions for populating the column, and third tells you the field type. Many of the fields are from the Disclosure Form and are not required as they are "helper" columns, others are optional or only required for specific project types.

Is a Termination Reason required?

- It is a required field if a record status is changing from Active to Terminated, and is a free-text field so any description can be input.

Does the bulk import template allow for actions to be taken for subscribers across projects as long as the project application ID is assigned within the template?

- Yes, the template can be used to import and/or manage subscriptions across various projects, as long as the user has access to manage those projects.

Are the explainer column headers always required when uploading a subscriber spreadsheet?

- The column headers are part of the template; they should not be changed before importing.

Subscription Management

Should we edit subscription status/size etc., when the change occurs in the utility portal or just ensure it's done before a verification cycle?

- It is best practice to keep this information updated across the course of the year to support Daily Average subscription rate calculations during the Annual Report process. However, the portal will only be required to be updated to support subscriber verificatoin events (PII verification, Quarterly Reports under the 15-Year REC Contracts, Semiannual Verifications under the 20-Year REC Contracts, and for Annual Reporting for all contracts).

If your AV contains multiple projects or is a TBD Approved Vendor how can we assign a subscription to a specific project?

- The AV will provide Designees access to manage specific projects. If delegated to manage, a Designee will have permission to add subscriptions to those specific project IDs. A To Be Determined (TBD) Disclosure Form can be subscribed to any project that a Designee is delegated to manage.

If we have 500 clients in a Community Solar project, do we need to input the AC every single month for all of them?

- AC sizes only need to be input when the subscription is created or changed.

What is the starting point for subscription management records - all completed Disclosure Form records?

- We are importing all subscriber data up to and including the December 2025 subscriber verification event, as well as any new Part II verifications that occur through February 2026. Any records that fail Portal validations will not be imported; AVs and Designees will need to correct and import those records. AVs will receive those reports in late February 2026.

How long do AVs/Designees have to correct records?

- After the initial import, the next major reporting deadline for most projects will be June 10, 2026, allowing time for AVs to review and correct those records.

Can we assign any AC we want? At the start of the project we will have production enough to cover or offset 100 % of the consumption, but after we fill all our capacity we can only ofset maybe 50% of the consumption. Do we need to change every time we make these decisions?

- Subscriber Agents will be able to assign any AC size to subscriptions. The portal gives a warning message if the sum of subscriptions exceeds the project's Actual Nameplate Capacity, but will allow the user to proceed. Subscription size changes should be updated in the portal throughout the Delivery Year to ensure accurate Daily Average subscription rate calculations in Annual Reporting.

Do subscription records need to be updated for the 2025-2026 Program Year only - ie. annual report?

- It would be best practice to update historical records, but the upcoming Annual Report will primarily review subscribers from the 2025-2026 Delivery Year.

How will current subscriptions be handled for the intial data?

- We are importing all subscriber data up to and including the December 2025 subscriber verification event, as well as any new Part II verifications that occur through February 2026. Any records that fail Portal validations will not be imported; AVs and Designees will need to correct and import those records. AVs will receive those reports in late February 2026.

Disclosure Forms

Will there be an option added to download multiple Disclosure Forms at the same time?

- Yes, all Disclosure Forms can be downloaded at the same time in an Excel report export.

Is it the case that a Disclosure Form that the Designee creates makes the Designee the owner, but that any Disclosure Form that the AV has on the project would need to be formally transferred to us so the Designee could view the Part II? Does that mean the AV would lose access to the Part II, or is that transfer applicable for a third party that is not a Designee or AV?

- A Disclosure Form can have both an AV owner and a Designee owner simultaneously. If a form is generated by a Designee and specifies the AV identification number (ID), both the AV and Designee could view and manage the form, which would include personally identifiable information (PII).

Is there a plan for addressing Disclosure Forms which were submitted without signatures due to the 2023 Leniency period?

- If you have forms that were submitted during the leniency period, please reach out to the Program Administrator for assistance.

How did we solve the outstanding problem of having mixed sources of Disclosure Forms for a project? For example as an SO, if we have a developer sourced account with a Disclosure Form, how would we get access?

- The "owner" of the form, who will have permission to subscribe it will be the AV and/or Designee indicated on the form when it's created. If a different entity needs to "manage" the subscription for that form, a Disclosure Form transfer can be requested.

Reporting

For initial verification, or quarterly/biannually, will we continue to have the same timelines of ensuring that the portals are all accurate before the program checks for verification?

- Yes, the same reporting deadlines, some of which are outlined in the REC Contracts, will apply.

For reporting (such as Quarterly or Part II Verification), do Disclosure Forms that are not in Completed status (and the subscriber is not subscribed) all need to be archived?

- Unsubscribed Disclosure Forms do not need to be archived to support subscriber verification events. However, only Completed Disclosure Forms will be permitted to be used for subscriptions. The Portal will not allow a subscription to be imported for a Disclosure From in a not-Completed status. We will only review subscribed Disclosure Forms for subscriber verification events.

For reporting (such as quarterly or Part II Verication), what is being checked by the Illinois Shines program for verification since we are no longer using the spreadsheet? Are we replacing the spreadsheet with the Subscription Management page and making sure all records on there match the utility records?

- The portal feautre is designed to collect, store, and allow AVs and Designees to manage subscriber data. The portal is replacing the SharePoint workbooks for the purposes of collecting data. To verify subscribers, the Program Administrator will use the subscriber data reported in the portal and perform the same subscriber verification checks, such as matching subscribers to the utility-provided subscriber reports.

General

Will the office hours be sent out or do we need to register for them?

- You do not need to register; the link for Office Hours can be found in the weekly Program Announcements

Some of the feedback provided in the last session was to advocate for the source of truth to come from the utility. Was there a determination on implementing that?

- We took that feedback into consideration but it was determined to be a larger scope than what we could support with this project. We will continue dialogue with the Illinois Power Agency (IPA) on this.