



Adjustable Block Program Informational Webinar for Approved Vendors

Wednesday, July 6, 2022



Presented by: Energy Solutions & Illinois Power Agency

Agenda

- 1** **Welcome and Presenters** – *IPA and Energy Solutions*

- 2** **June 28 Webinar Recap** – *Energy Solutions*

- 3** **Operational Updates and How-to** – *Energy Solutions*

- 4** **What's Next** – *Energy Solutions*

- 5** **Q&A** – *IPA and Energy Solutions*

Welcome from IPA



Anthony Star
Director, Illinois Power Agency



Audrey Steinbach
Program Manager, Adjustable Block Program/
Illinois Shines, Illinois Power Agency

Energy Solutions' Presenters



Tamara Perry
Director, Solar and
Storage Programs



Rebecca Feuerlicht
Senior Manager



Randi Moscoe
Senior Software Product Owner



Keely Weiss
Project Manager II
Program Operations



Sara Wood
Data Analytics and Reporting
Project Manager



June 28 Webinar Recap

The Energy Solutions ABP Team



Operations Team	Technical Team	Transition SMEs
  GROUP O 	  	   

Program Administrator

Support key functions and efforts including:

- Program Management
- Operations and Systems
- Technical Engineering Assistance
- Contact Center
- Consumer Protection
- Stakeholder Communications and Resources
- Diversity, Equity and Inclusion
- Sector Strategists

Transition Period Operational Review

Review key activities and activities to close out on existing portal, and whether activities will be handled via initial new portal, SharePoint or Email processes



Legacy Portal	New Portal and July 1 Functionality	SharePoint Processes	Email Processes
<p>Activities AVs are encouraged to finish prior to 7/1 - Extension requests, July REC invoicing</p>	<p>Logins, AV and AVD linkages, Creating Disclosure Forms and In-Process DFs, REC Invoicing, Anticipated future functionality</p>	<p>Annual Reports, Bi-Annual Reports, CSV process for CS Disclosure Forms</p>	<p>Extension requests, Designee requests, Need Info curing and any other questions</p>

Questions and Answers – 6/28/22 Webinar

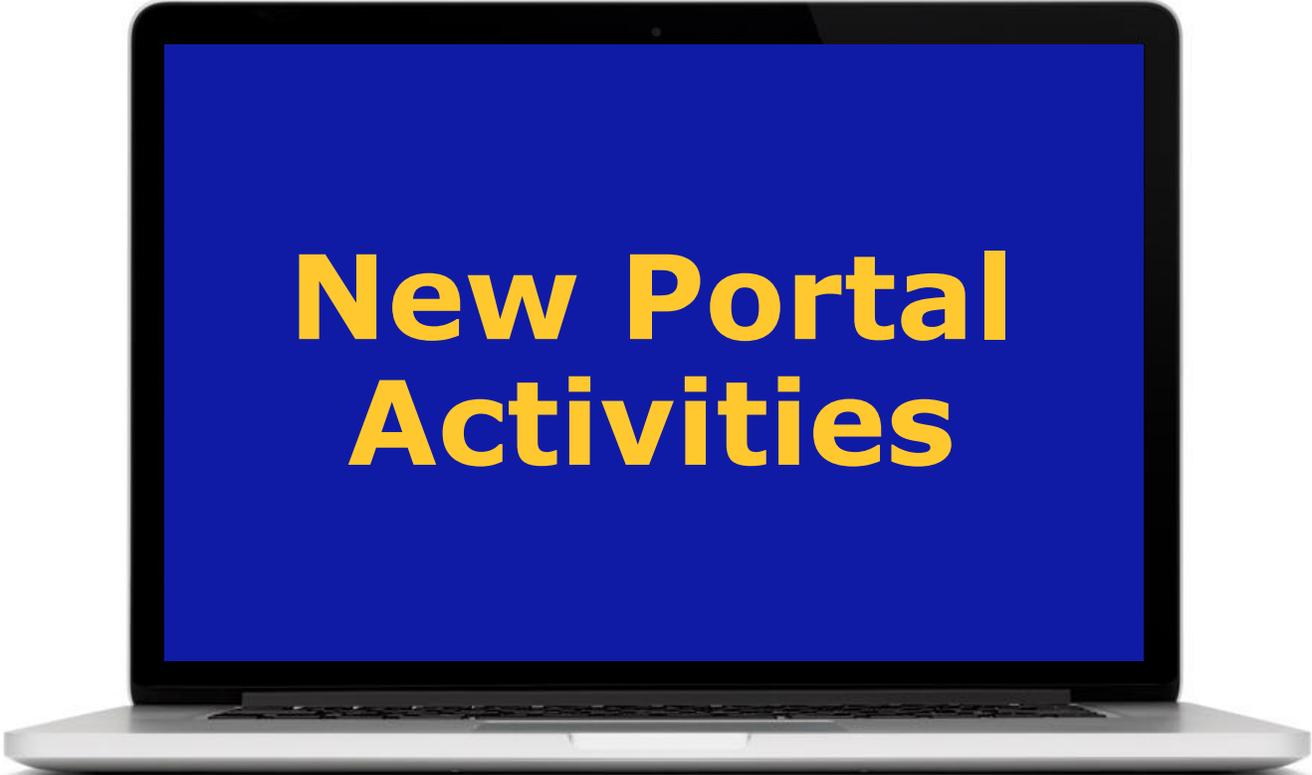
Nearly 75 questions were posed by attendees!

- Portal Access
- Disclosure Forms
- CSV access for Community Solar and Distributed Generation projects
- Approved Vendor management
- Deadline management
- Backlog applications and application processing
- Community Solar subscription management
- Marketing and Consumer Protection
- Miscellaneous
- Questions and answers can be found at www.IllinoisABP.com





Operational Updates and How To



New ABP Portal – July Release



<https://portal.illinoisabp.com/> - Portal URL remains the same
New Password/Same Username

For first time login into the new ABP Portal, all users, including those with Portal access prior to July 1st, as well as new users, are required to reset (or newly establish) their passwords, using the Forgot Password process to establish a new, secure Portal password.

Our webinar presentation should have mentioned that for identification management purposes, the Forgot Password link process triggers the generation of a unique URL sent to the AV at their registered program email, which then supported a unique, user authentication process. The system did not make use of a default password.

1. At the Sign In area, click Forgot Password
2. At the Forgot Password screen, enter registered program email
3. Click the unique URL sent to you via email
4. Use the Password Reset tool

Sign in

Username

Password

Sign in Forgot Password

This portal is designed for the Illinois Adjustable Block Program's Approved Vendors or their Designees. Homeowners and businesses interested in participating in the Adjustable Block Program and contributing to the growth of renewable energy in Illinois must go through an Approved Vendor.

Forgot your password?

Don't worry, just enter your email address and we will send you an email to update your password.

Email Address

Your registered email address

Recover Password

Please confirm your password reset request

ILABP Support <illinoisadjustableblockprogram@outlook.com>
To: Anu Vijay

Tuesday, July 5, 2022 at 7:14 PM

Hello,

Please use the link below to confirm your password reset request <https://ilabp.apps.us-2a.mendixcloud.com/link/ForgetPassword?GUID=15f23d72-dca5-46ce-82d6-a5b4305d035c>

If you did not request a password reset, you can ignore this message.

ILAB Support Team

Password Reset

Please create a new password for your account

New password

Confirm password

Your new Password —
min 12 characters, Alpha, Numeric, Upper &
lower case and special character \$@!#

Continue

New ABP Portal – July Release



Forgot Password AFTER first time login

- Click Forgot password
- Provide your registered email
- Receive email with link
- For access or disclosure form troubleshooting, email admin@illinoisabp.com or call 877-783-1820

Sign in

Username

Password

[Sign in](#) [Forgot Password](#)

This portal is designed for the Illinois Adjustable Block Program's Approved Vendors or their Designees. Homeowners and businesses interested in participating in the Adjustable Block Program and contributing to the growth of renewable energy in Illinois must go through an Approved Vendor.

Forgot your password?
Don't worry, just enter your email address and we will send you an email to update your password.

Email Address

[Recover Password](#)

Please confirm your password reset request

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Password Reset

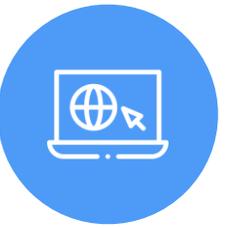
Please create a new password for your account

New password

Confirm password

[Continue](#)

New ABP Portal – July Release



Disclosure Forms

Data brought over from Legacy portal

- Submitted, Awaiting Signature, Complete
- Signed .pdf which were uploaded and are stored (accessible soon)
- Awaiting signature will be resent thru Energy Solutions so they can be received and then updated to status complete (coming soon)

View a disclosure form – starting place

- Workbench
 - Search by Form ID & System Name
 - More sort and search due soon

Create a new disclosure form (from Workbench) (direct create soon)

- Distributed Generation
- Community Solar

Create .pdf for signature (coming soon)

Upload a disclosure form (wet signed .pdf) (coming soon)

Landing Page – Vendors and Designees

A screenshot of a web application interface. At the top left is the 'ILLINOIS SHINES' logo with the tagline 'Supporting Solar Development in Illinois'. At the top right is the 'IPA ILLINOIS POWER AGENCY' logo. Below the logos are two buttons: 'View Disclosure Forms' and 'Upload Signed Forms'. To the right of these buttons is a pagination control showing 'Page 1' with navigation arrows. Below the buttons is a table with two columns: 'Vendor ID' and 'Company name'. The table contains two rows of data: one with '14' in the Vendor ID column and one with '1136' in the Vendor ID column. The Company name column is currently empty for both rows.

Vendor ID	Company name
14	
1136	

Landing Page – Vendors and Designees



SELECT YOUR VENDOR ID

(You should see a color change for your selected row). Then, select View Disclosure Forms

A screenshot of a web application interface. At the top left is the 'ILLINOIS SHINES' logo with the tagline 'Supporting Solar Development in Illinois'. At the top right is the 'IPA ILLINOIS POWER AGENCY' logo. Below the logos are two buttons: 'View Disclosure Forms' and 'Upload Signed Forms'. A purple arrow points to the 'View Disclosure Forms' button. Below the buttons is a table with two columns: 'Vendor ID' and 'Company name'. The first row has '14' in the 'Vendor ID' column and a greyed-out 'Company name' cell. A yellow box highlights the first row, and a red error message 'Select the Vendor ID before starting' is displayed in the 'Company name' column. The second row has '1136' in the 'Vendor ID' column and a white 'Company name' cell. An 'Information' dialog box is overlaid on the right side of the table, containing the text 'No selection available.' and an 'OK' button.

If you forgot to make a selection, you will receive this message - Just click OK, and select a vendor ID

Landing on the Disclosure Form Workbench



DF which have been created under your vendor ID will be listed

- *System names have been hidden to protect data*
- *Application data is still being imported and may not be present at this time*

New forms created on this portal may have status “In Progress” and “Resume Form” is working

- The other Action buttons are soon to be released

Imported forms have statuses of Completed, Submitted, Awaiting Signature

Disclosure Forms							
Create new Distributed Generation Disclosure Form				Create new Community Solar Disclosure Form			
Form ID	System Name	Form Type	Status	Action	Application ID	Date Submitted	Download Form
235107	testppa123	PPA Form	In Progress	Resume Form			
220325		Purchase Form	Completed	View Form		6/29/2022	Download
220296		Purchase Form	Completed	View Form		6/29/2022	Download
220130		Purchase Form	Completed	View Form		6/29/2022	Download
219586		PPA Form	Submitted	Upload/E-Sign Form		6/27/2022	
219466		Purchase Form	Completed	View Form		6/27/2022	Download
218939		Purchase Form	Submitted	Upload/E-Sign Form		6/24/2022	

Searching – By System Name, By Form ID



By System Name, using a string:

Form ID	System Name	Form Type
TEST		
235110	RMTESTPURCHASE234	Purchase Form
235107	testppa123	PPA Form

By Form ID :

Form ID	System Name	Form Type
222		
35222		Purchase Form
22221		Purchase Form



Starting A New Disclosure Form, From the Disclosure Form Workbench

Substantially the same as the legacy portal, with minor look and feel differences.

Disclosure Forms

Create new Distributed Generation Disclosure Form

Form ID	System Name	Form Type	Status



Starting A New Disclosure Form, From the Disclosure Form Workbench

The vendor ID you selected at the start is automatically assigned. IF you have other vendors you are associated to, you may make a change now.

Select your form type.

Add a system name.

Then, **Save and Continue**

New Distributed Generation Disclosure Form

Form ID 235110 Vendor ID selected from the opening is identified. If you meant for this to be your other vendor, you can fix that now

Vendor *

Vendor ID for this form: 14

Vendor ID

= Search

14

1136

1 to 2 of 2

System Name *

RMTESTPURCHASE234

Save and Continue

Type of Form *

Purchase Form

Type of Form *

- ✓ Lease Form
- Over 25 Form
- PPA Form
- Purchase Form



Starting A New Disclosure Form, From the Disclosure Form Workbench

Errors in data entry are flagged before you go to the next section -

Click OK to close the message then you can manage what issue need to be addressed

Customer Contact Information In Progress

Please put the Installation Address of the project

Customer

Name *
RANDI TEST234

Apartment or Suite

State *
Illinois

Phone *
999=123-777

This data field is required

Enter 123-123-1234 with no extensions allowed

Customer's Electric Utility *
AmerenIllinois

Information [X]

'Please check your form application for validation errors'

OK

Email
ME@MYEMAIL.COM

The standard waiver which can be downloaded in the Additional Terms and Disclosures section below must be signed and uploaded for any customer without an email address in order to generate a disclosure form.



Starting A New Disclosure Form, From the Disclosure Form Workbench

As each section is completed and validated, the next section will open:

Customer Contact Information	Completed Revisit
Other Parties' Contact Information	In Progress
System Seller	
Use Approved Vendor Contact Information	



Starting A New Disclosure Form, From the Disclosure Form Workbench

When filling out data, there are options to use existing address information in several places in the form.

System Seller

[Use Approved Vendor Contact Information](#)

Legal Name *
RANDI'S BEST COMPANY

Street *
123 HAPPY PLACE

City *
MYTOWN

Zipcode *
54321

Email
EMAIL@XX.COM

Company's DBA
BESTIES

Name Used for Marketing (if different)
NONE

Apartment or Suite

State *
OH

Phone *
555-232-3232

Enter 123-123-1234 with no extensions allowed



Starting A New Disclosure Form, From the Disclosure Form Workbench

EMAIL@XX.COM

The standard waiver which can be downloaded in the Additional Terms and Disclosures section below must be signed and uploaded for any customer without an email address in order to generate a disclosure form.

System Installer

Is the system installer known at this time? *

Yes

If no, must provide at least three potentials

Installer

Use Approved Vendor Contact Information

Legal Name *

Note: use Seller Info matches what was entered earlier

Terms and Disclosures section below must be signed and uploaded for any customer without an email address in order to generate a disclosure form.

System Warranty and/or Maintenance Provider

System Warranty and/or Maintenance Provider is the same as Installer

Yes

Use Approved Vendor Contact Information Use System Seller Contact Information

Legal Name *

RANDI'S BEST COMPANY

Street *

123 HAPPY PLACE

City *

MYTOWN

Company's DBA

BESTIES

Company Name Used for Marketing (if different)

NONE

Apartment or Suite

State *

OH



Starting A New Disclosure Form, From the Disclosure Form Workbench

COMPLETE ALL SECTIONS –

REVISIT ALLOWED to make any last-minute changes.

See message at the end for hints and added information

And then **"SUBMIT"**

Other Parties' Contact Information	Completed Revisit
System Purchase Information	Completed Revisit
Fees	Completed Revisit
System Installation Timing	Completed Revisit
System Design Specifications	Completed Revisit
System Operations, Maintenance, Warranties, and Guarantees	Completed Revisit
Additional Terms and Disclosures	Completed Revisit
Submit and Download	In Progress

Please review all information you've entered before hitting submit. Once you click on Submit, you will be unable to make any changes to this form.

After submitting, you will be able to access this form from your dashboard. To find this form on your Consumer Disclosure Form Dashboard and search for Form ID #235110

After downloading the form, you must have it signed by the Customer and uploaded or sent to the customer for an electronic signature.

Upcoming Features





UPCOMING FEATURES

Consumer Disclosure Form - Upload

System Name: RMTSTPURCHASE234 (ID # 235110)
Form Status: Submitted

[View Form PDF](#) Your form still needs to be either signed and uploaded, or sent for an e-signature.

Upload Signed Copy of Disclosure Form

... [Browse...](#)

[Upload Signed Form and Submit](#) If you have utilized a third party e-signature program to obtain the customer's signature, please attach a copy of the signature summary/tracking page to the signed Consumer Disclosure form

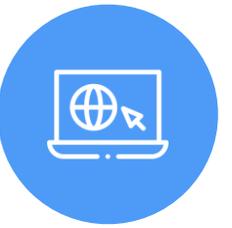
Send to Customer for E-Signature

[Send to Customer for E-Signature](#) If you have utilized a third party e-signature program to obtain the customer's signature, please attach a copy of the signature summary/tracking page to the signed Consumer Disclosure form

If this system was energized or went under contract prior to the IPA's finalization of the disclosure form on December 27, 2018, you have the option of attesting that your good-faith, diligent efforts to contact the system host to secure signature on the disclosure form were unsuccessful or resulted in the system host refusing to sign the disclosure. If you would like to exercise this option in order to initiate a Part 1 application for the system, please contact the Program Administrator. The option cannot be exercised until 7 days have passed after you generate the disclosure and provided it to the system host.



Legacy Portal



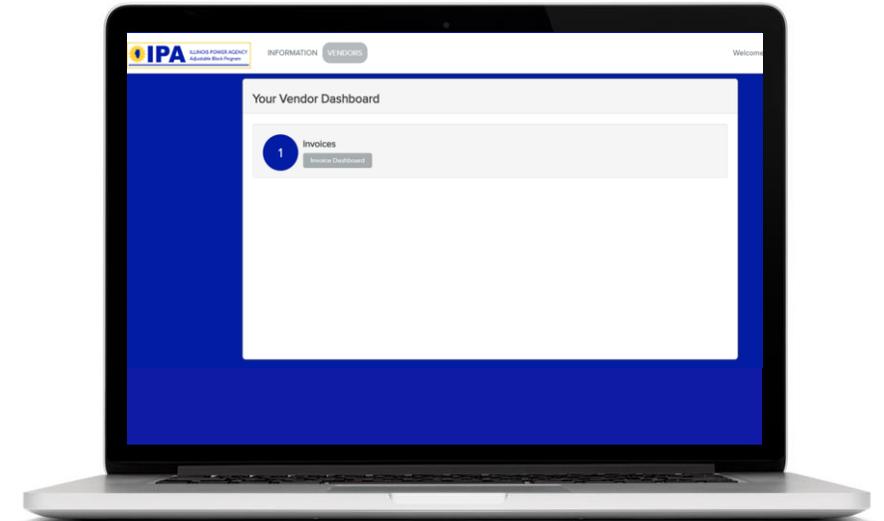
- **Read-only access to all historical records**
 - Please note the legacy ABP portal run by InClime ceased to be available after 2PM Central on June 30, 2022.
 - Read-only access to the legacy portal will be granted to Approved Vendors and Designees on an as-needed basis and at the discretion of the IPA.
 - Please email IPA.Solar@illinois.gov to request read-only access, if needed.
- **Submit any Part I or II applications before 2PM Central (by June 30, 2022)**
- **July REC Invoicing (more details on next slide)**

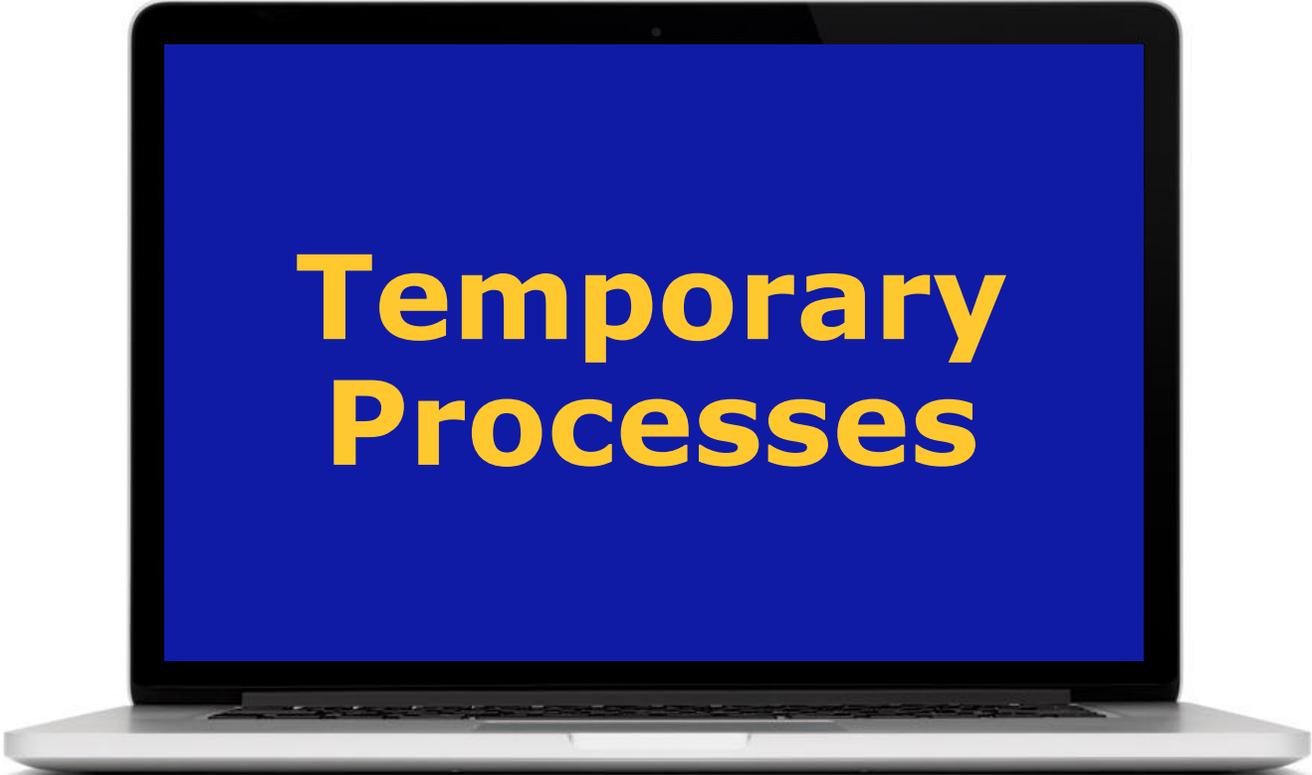


July REC Invoicing



- Those AVs who have projects eligible for REC invoicing in July should have received an email from InClime on June 30th with access information.
- July REC invoicing is open from July 1 – 10 only
- Login to the legacy portal remains the same
- Process to generate invoices is the same
- After July REC invoicing is complete, invoice history will be migrated into the legacy Portal for read-only access.





Temporary Processes – SharePoint and Email

SharePoint Processes

- Annual Report
- Bi-Annual Report
- CSV process for Community Solar Disclosure Forms
- Community Solar Subscriber Management



Email Processes

- Designee Requests
- Extension Requests
- Need Info Responses
- General questions



Accessing SharePoint





Rebecca Feuerlicht shared a folder with you

Here's the folder that Rebecca Feuerlicht shared with you.

 999_Approved Vendor Name Test

Ⓜ This link only works for the direct recipients of this message.

[Open](#)

***Please check your bulk/spam folder**

Request Verification Code

You've received a secure link to:

 999_Approved Vendor Name Test

To verify your identity, we'll send a code to you

[Send Code](#)

By clicking Send Code you allow Energy Solutions to use your email address in accordance with their privacy statement. Energy Solutions has not provided links to their terms for you to review.

© 2017 Microsoft [Privacy & Cookies](#)

Enter Verification Code

You've received a secure link to:

 999_Approved Vendor Name Test

To open this link, enter the code we just emailed [Send again](#)

ⓘ

[Verify](#)

Keep me signed in

Accessing SharePoint



IL Adjustable Block Program Extranet

+ New ▾ ↑ Upload ▾ 📄 Edit in grid view ➦ Share 🔗 Copy link ↻ Sync ↓ Download 📁 Add shortcut to OneDrive

Annual Reports > 999_Approved Vendor Name Test

📄 Name ▾	Modified ▾	Modified By ▾	+ Add column ▾
Bi-Annual Report AV Template.xlsx	June 28	Keely Weiss	
Community Solar Subscriber Information_A...	June 23	Keely Weiss	
RECsDelivered_AV999.csv	June 23	Keely Weiss	
SystemsEnergizedNoRECs_AV999.csv	June 23	Keely Weiss	
SystemsNotEnergized_AV999.csv	June 23	Keely Weiss	



Annual Report

Both necessary emails have been sent

- One email with SharePoint access
- One email with links to Annual Report and instructions

Reminders

- Self identification required
- Reference SharePoint folders
- Progress not saved
- Click Submit button
- Open July 5th - July 15th, 2022
- Failure to submit an annual report is considered an event of default under the REC contract.

2022 Annual Report Form IL ABP

* Required

Please submit your response to the 2022 Annual Report using this form. This is a shift in approach from previous years where the Annual Report was completed and submitted solely through the ABP portal.

Answers to these questions should reflect all ABP activity from **June 1, 2021 through May 31, 2022**.

The Annual Report will open on July 5, 2022, with submitted **responses due by Approved Vendors to the Program Administrator by July 15, 2022**. Please keep in mind that submission of an Annual Report is a requirement and failure to submit an Annual Report is an Event of Default under the REC Contract.

Once you begin, progress will not be saved. Your response must be recorded and submitted in one sitting. Please do not submit duplicate responses. If you need to edit any of the information in your response to the Annual Report, or have any questions, please contact the Program Administrator at admin@illinoisabp.com.

Please be sure to click the Submit button at the end of the form. If you do not click this button, your entries will be deleted and your submission will not be recorded.

If you do not have any relevant projects for the Annual Report and your SharePoint folder (correctly) does not contain any files, you still must submit a response indicating N/A as appropriate.

Please see the 2022 Approved Vendor Annual Report Guide, which was emailed to you, for further instructions.

1. Vendor ID

If you are unsure of your Vendor ID, please reference your SharePoint folder name or annual report email which will include this number. It is a one, two, or three digit number. *

2. Company Name *

3. Your First and Last Name *



Bi-Annual Report

- Email notification sent when a response is due
- Use SharePoint link for Annual Report access
- Provide responses directly in Excel form
- Responses shared with Utility

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	This report will be shared with the contracting utility. Completing this report in the ABP portal fully satisfies the requirements of the Bi-Annual System Status Form in Exhibit B of the REC contract.															
2	Please provide your project updates in columns L-O in this report.															
	Utility											Project Status				
	REC Contract	Effective Date	Trade Date	Mid-American	Approved Vendor Name	Vendor ID	Batch ID	Application ID	Project Name	Proposed Nameplate Capacity	Proposed Capacity Factor	REC Version	By indicating "Cancelled" I understand that I've indicated that my project has been canceled and that it may be withdrawn from the Adjustable Block Program.	If project is in progress (not cancelled or completed), when do you anticipate completing the system? Please enter a date.	If project is in progress (not cancelled or completed), have any of the following caused delays to the system?	If project is in progress (not cancelled or completed), have there been any significant changes to the system?
3																
4	5/2/2019	7/17/2019		2	Test Vendor	999	999	999	Test Project	10	14.26	1				
5	5/2/2019	7/17/2019		2	Test Vendor	999	999	999	Test Project	10	14.26	1				
6	5/13/2019	10/8/2020		1	Test Vendor	999	999	999	Test Project	4	15.13	1				
7	5/13/2019	10/8/2020		1	Test Vendor	999	999	999	Test Project	4	15.13	1				
8																
9																



Community Solar Disclosure Form Workaround Process

On request – ES will create a community solar disclosure form folder on SharePoint to act as a document transfer hub

- Three subfolders will be: "Blank Disclosure Form PDF", "Executed DFs", and "DF CSV"

Blank DFs Folder – Access blank, unique DFs

- Each DF has a pre-populated name and number – Please do not change

Executed DFs Folder – Upload populated, executed DFs

- Both wet and electronic signatures are acceptable

DF CSV – Upload populated CSV template



Subscriber Management

Process to update Subscribers for next Quarterly Subscriber Verification beginning September 1, 2022

Temporary SharePoint based process

- Create Workbook for each Approved Vendor
- Input subscribers from Legacy Portal, as well as any unassigned disclosure forms

Disclosure Form and Subscriber Tab

- AVs and AVDs can create subscribers based on disclosure forms
- PA team will input disclosure forms from the portal or temporary CSV option

Project Dashboard Tab

- Summarizes total and small subscribers by project

Available July 20th, 2022

CS Subscriber Tracking Demo



Disclosure Form Template Information								Create/Edit Subscriber Information										Formulas		
Disclosure Form ID	Subscriber Name	Subscriber Street	Subscriber Apt/Suite	Subscriber City	Subscriber State	Subscriber Zip	Utility Account Number from DF	Date Subscriber Created (added to legacy Portal or created in this workbook)	Date Subscription Terminated (if applicable)	Subscriber ID	Subscriber Status	Subscription Size (kW AC)	Subscriber Utility	Last 5 digits of Subscriber Utility Account Number	Date Subscriber was Sent to Utility	Subscriber Type	Project Name	Project Application ID	Small Subscriber	Subscriber
100001	Test Name 1	123 Main St		Chicago	IL	60007	12345678	1/1/2022			Active		7 Ameren Illinois	12345	1/1/2022	Residential	Project A	1001	1	1
100002	Test Name 2	124 Main St		Chicago	IL	60007	12345679	1/2/2022	3/31/2022		Terminated		7 Ameren Illinois	12345	1/2/2022	Residential	Project A	1001	0	0
100003	Test Name 3	125 Main St		Chicago	IL	60007	12345680	1/3/2022			Active		9 Ameren Illinois	12345	1/3/2022	Residential	Project A	1001	1	1
100004	Test Name 4	126 Main St		Chicago	IL	60007	12345681	1/4/2022			Active		5 Ameren Illinois	12345	1/4/2022	Residential	Project B	1002	1	1
100005	Test Name 5	127 Main St		Chicago	IL	60007	12345682	1/5/2022			Active		4 Ameren Illinois	12345	1/5/2022	Residential	Project B	1002	1	1
100006	Test Name 6	128 Main St		Chicago	IL	60007	12345683	1/6/2022			Active		4 Ameren Illinois	12345	1/6/2022	Residential	Project B	1002	1	1
100007	Test Name 7	129 Main St		Chicago	IL	60007	12345684	1/7/2022			Active		6 Ameren Illinois	12345	1/7/2022	Residential	Project C	1003	1	1
100008	Test Name 8	130 Main St		Chicago	IL	60007	12345685	1/8/2022			Active		10 Ameren Illinois	12345	1/8/2022	Residential	Project C	1003	1	1
100009	Test Name 9	131 Main St		Chicago	IL	60007	12345686	1/9/2022			Active		8 Ameren Illinois	12345	1/9/2022	Residential	Project C	1003	1	1
100010	Test Name 10	132 Main St		Chicago	IL	60007	12345687	1/10/2022			Active		5 ComEd	12345	1/10/2022	Residential	Project D	1004	1	1
100011	Test Name 11	133 Main St		Chicago	IL	60007	12345688	1/11/2022			Active		14 ComEd	12345	1/11/2022	Residential	Project D	1004	1	1
100012	Test Name 12	134 Main St		Chicago	IL	60007	12345689	1/12/2022			Active		8 ComEd	12345	1/12/2022	Residential	Project D	1004	1	1
100013	Test Name 13	135 Main St		Chicago	IL	60007	12345690	1/13/2022	3/31/2022		Terminated		45 ComEd	12345	1/13/2022	Residential	Project E	1005	0	0
100014	Test Name 14	136 Main St		Chicago	IL	60007	12345691	1/14/2022			Active		25 ComEd	12345	1/14/2022	Residential	Project E	1005	0	1
100015	Test Name 15	137 Main St		Chicago	IL	60007	12345692	1/15/2022			Active		30 ComEd	12345	1/15/2022	Small Commercial	Project E	1005	0	1
100016	Test Name 16	138 Main St		Chicago	IL	60007	12345693													
100017	Test Name 17	139 Main St		Chicago	IL	60007	12345694													
100018	Test Name 18	140 Main St		Chicago	IL	60007	12345695													
100019	Test Name 19	141 Main St		Chicago	IL	60007	12345696													
100020	Test Name 20	142 Main St		Chicago	IL	60007	12345697													
100021	Test Name 21	143 Main St		Chicago	IL	60007	12345698													
100022	Test Name 22	144 Main St		Chicago	IL	60007	12345699													
100023	Test Name 23	145 Main St		Chicago	IL	60007	12345700													

Project Name	Project App ID	Project Size kW AC	Number of Subscribers Small Subscribers	Capacity Subscribed (kW) Small Subscriber	Percent Subscribed (kW) Small Subscriber	Number of Subscribers Total	Capacity Subscribed (kW) Total	Percent Subscribed (kW) Total
Project A	1001	2000	2	16	0.80%	2	23	1.15%
Project B	1002	2000	3	13	0.65%	3	13	0.65%
Project C	1003	2000	3	24	1.20%	3	24	1.20%
Project D	1004	2000	3	27	1.35%	3	27	1.35%
Project E	1005	2000	0	0	0.00%	2	100	5.00%
			0	0	#DIV/0!	0	0	#DIV/0!
			0	0	#DIV/0!	0	0	#DIV/0!
			0	0	#DIV/0!	0	0	#DIV/0!
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Designee Request Form & Process

1. Designee Makes Request

- Contact PA by phone or email to request a Designee Request Form

2. Designee Completes, Signs and Initials Form

- Form includes basic information, requested designee roles, initials on program attestations, and a signature
- Designee returns form to AV

3. AV Sends Completed Designee Request Form to PA

- Once the Designee has completed the form, it is sent to the AV, who emails the form to the PA, providing record of approval.

4. PA Tracks New Designee Relationship

*Note that portal registration is paused until September 1, 2022

Designee Request Form



Designee Request Form

Section 6.9.1 of the Revised Long-Term Plan describes a new requirement for any third-party (i.e., non-Approved Vendor) entities that have direct interaction with end-use customers of the ABP to register as a Designee and be listed on the ABP and Illinois Shines websites, along with the Approved Vendors with which they work. The purpose of this new 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 will be added to the Program's Designee database once registered. This database will be housed on both the ABP and Illinois Shines websites. **Moving forward, all third-party entities that have direct interaction with end-use customers of the ABP and that operate within the Illinois Adjustable Block Program need to register by submitting a Designee Request Form, which is a temporary process during the program transition. Please note that portal access for new designees will be delayed until September, 2022.**

- Disclosure Form Designee — An entity that is permitted to generate Disclosure Forms on behalf of an 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 an 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 services.
- Installer Designee — An entity that has been designated to install systems on behalf of an Approved Vendor or Designee.

The IPA and Program Administrator reserve the right to add or remove roles as needed over time. Once a Designee as completed, initialed, and signed the Designee Request Form, it should be emailed to the Approved Vendor to return to the Program Administrator. In writing, the Approved Vendor must provide approval to the Program Administrator to accept the Designee Request Form. A new Designee is not authorized to act in the indicated role until affirmatively approved in writing by one or more Approved Vendors. A Designee is authorized to act only in that designated role with Approved Vendors that have approved it as a Designee and have not revoked that acceptance.

Existing Designees of an Approved Vendor have 45 days from the release of this Program functionality on October 26, 2020 to register and act in compliance with this new Program requirement. 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.

DESIGNEE REQUEST FORM

Requested Approved Vendor		Requested Approved Vendor ID	
Name		Company Name	
Street Address		City	
State	Zip Code	Phone	
Email address			
Type of Designee:		<input type="checkbox"/> Disclosure Form Designee <input type="checkbox"/> Community Solar Subscriber Designee <input type="checkbox"/> Marketing or Sales Designee <input type="checkbox"/> Installer Designee	

Social Media: Please include all social media accounts that contain Illinois Adjustable Block Program (ABP) information, market your company's ABP offers, and/or connects customers to the ABP.

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

Please initial below

- We have reviewed and commit to comply with all ABP requirements applicable to our work as a Designee.
- We have read, understand, and will abide by the Program's Marketing Guidelines, 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 both the ABP website (illinoisabp.com) and the Illinois Shines website (illinoisshines.com).
- We will maintain accurate, current, and comprehensive registration information related to our business relationships with Approved Vendors 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 ABP requirements are subject to disciplinary action from the IPA which could result in suspension from the ABP 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	<input type="text"/>	Print Name	<input type="text"/>
Title	<input type="text"/>	Company	<input type="text"/>
Date	<input type="text"/>		

New Approved Vendor Requests



- **Applications for new Approved Vendors are paused until September 1, 2022.**
- **Any companies interested in becoming an Approved Vendor can be added to a waitlist.**
- **Reminder that renewal requirements for Approved Vendors are also paused until September 1, 2022.**



For Ongoing Support



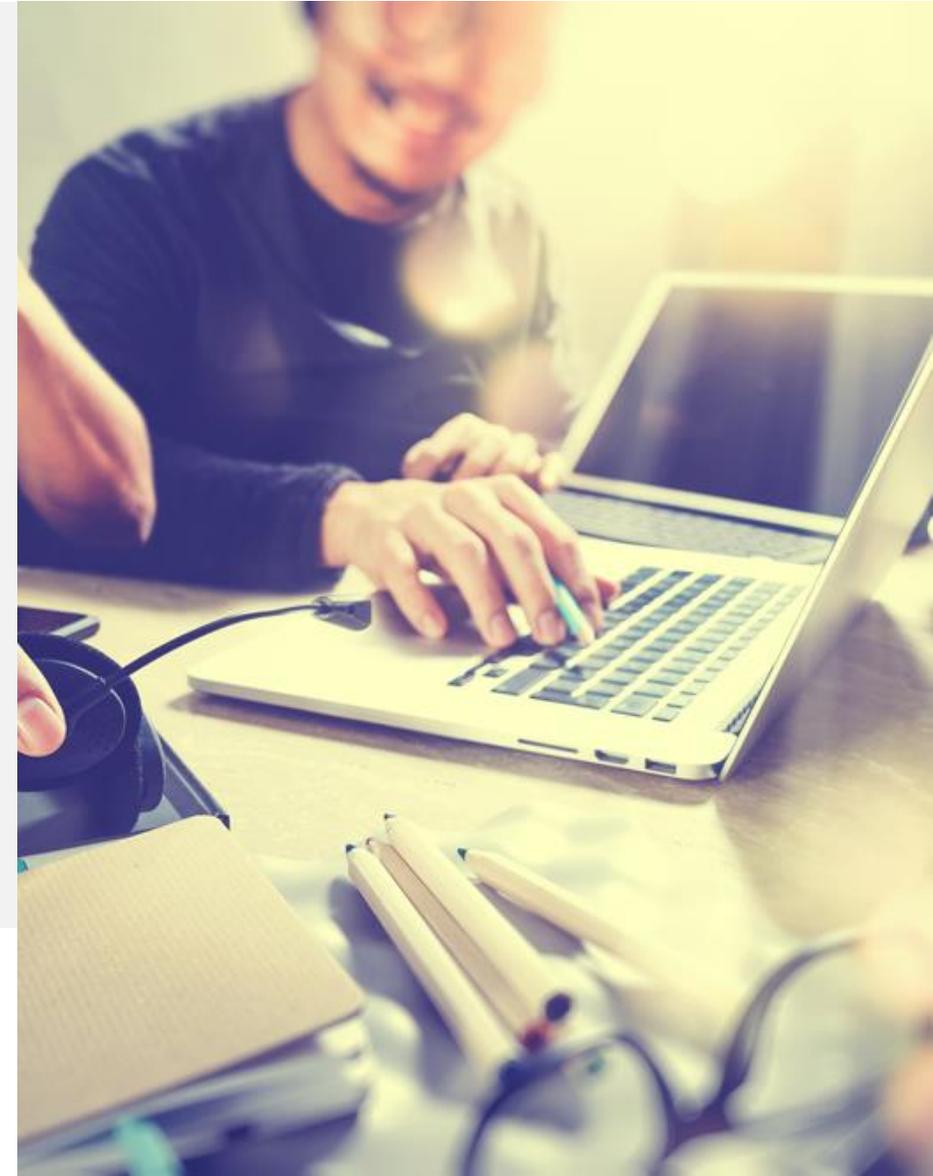
Process to request extension has not changed

- Email requests to IPA (IPA.Solar@illinois.gov) and contracting utility (ComEd, Ameren, or MidAmerican)
- Energy Solutions will email new Schedule A to AV and Utility within 24 hours of an extension being approved

Responses to *Need Info* requests have not changed

- Provide any *Need Info* request, and PA team will process in your applications.

For any other questions, please submit via email –
admin@illinoisabp.com



Application Processing Timeline



Additional details on the prioritization of application review during the application pause will be shared soon



What's Next

What's Next

For immediate support, email admin@illinoisabp.com

- Growth through Collaboration – AVS and AVDs, IPA and the ES team
 - Increased stakeholder collaboration, forums, communications and engagement
 - Skilled Program Management, Operations, Software, Support and Communications
 - Concierge Service (Sector Strategists and Self-operated Call Center)
 - Experienced engineers providing tech review & project support
- Upcoming new portal functionality and support, including enhanced capabilities (including August 1st-15th API/CSV Disclosure Forms)
- Improved websites with focus on updated resources, announcements and materials supporting AV efforts, and enhancing the consumer experience



Q&A



Thank you!

