



Illinois Solar for All

TBD Disclosure *AV* Guidance

September 2024

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TBD Disclosure Form Process Description

Elevate is initiating the **“To Be Determined” (TBD) Disclosure Forms** in support of the Illinois Solar for All (ILSFA) program in adherence with Section V(B) Standard Disclosure Forms and Requirements for Contract Execution of the Illinois Power Agency (IPA) Consumer Protection Handbook (CP Handbook) effective June 2024.

TBD Disclosure Forms are used for recipients that desire a subscription to a Community Solar (CS) project and where the Approved Vendor (AV) or Designee has not identified the specific CS project at the time of the recipient’s enrollment.

TBD Disclosure Bulk Upload Templates **will be available October 4, 2024.**







Overall TBD Disclosure Process Steps

Generating a TBD Disclosure Form **can include** the following steps:



Overall AV Role & Responsibilities

1. Vendors must be approved by the IPA to submit project applications to ILSFA.
2. AVs must administer the TBD disclosure process in accordance with the CP Handbook, including:
 -  • Executing a signed, correct CS TBD Disclosure Form with the Recipient (see next slide).
 -  • Submitting the TBD CS Disclosure information to the Program Administrator via the Recipient Verification and Bulk Upload Templates.
 -  • Ensuring on time notifications and evidence in alignment with the CP Handbook.
 -  • Updating statuses for cancellation, extensions and project assignment as relevant using the Edited Bulk Upload Template.

Designees:

- AVs can have Designees
- Designees may be responsible for acting on behalf of an AV to satisfy AV requirements.
- AVs are accountable for managing and supervising a Designee that markets CS projects.



What do I need to Get Started?



Requirements:

- Recipient desires a subscription to a CS project AND
 - Project assignment is not confirmed.
- AV must determine 2 to 5 available projects for potential assignment.
 - Note: From the available CS projects, the project with the lowest ACF will be used to calculate all savings.



First steps:

1. Complete a CS TBD Disclosure Form with the recipient (follow the appropriate PDF below for guidance).
2. Initiate the CS Recipient Verification (optional) and Bulk upload templates (see next slides).



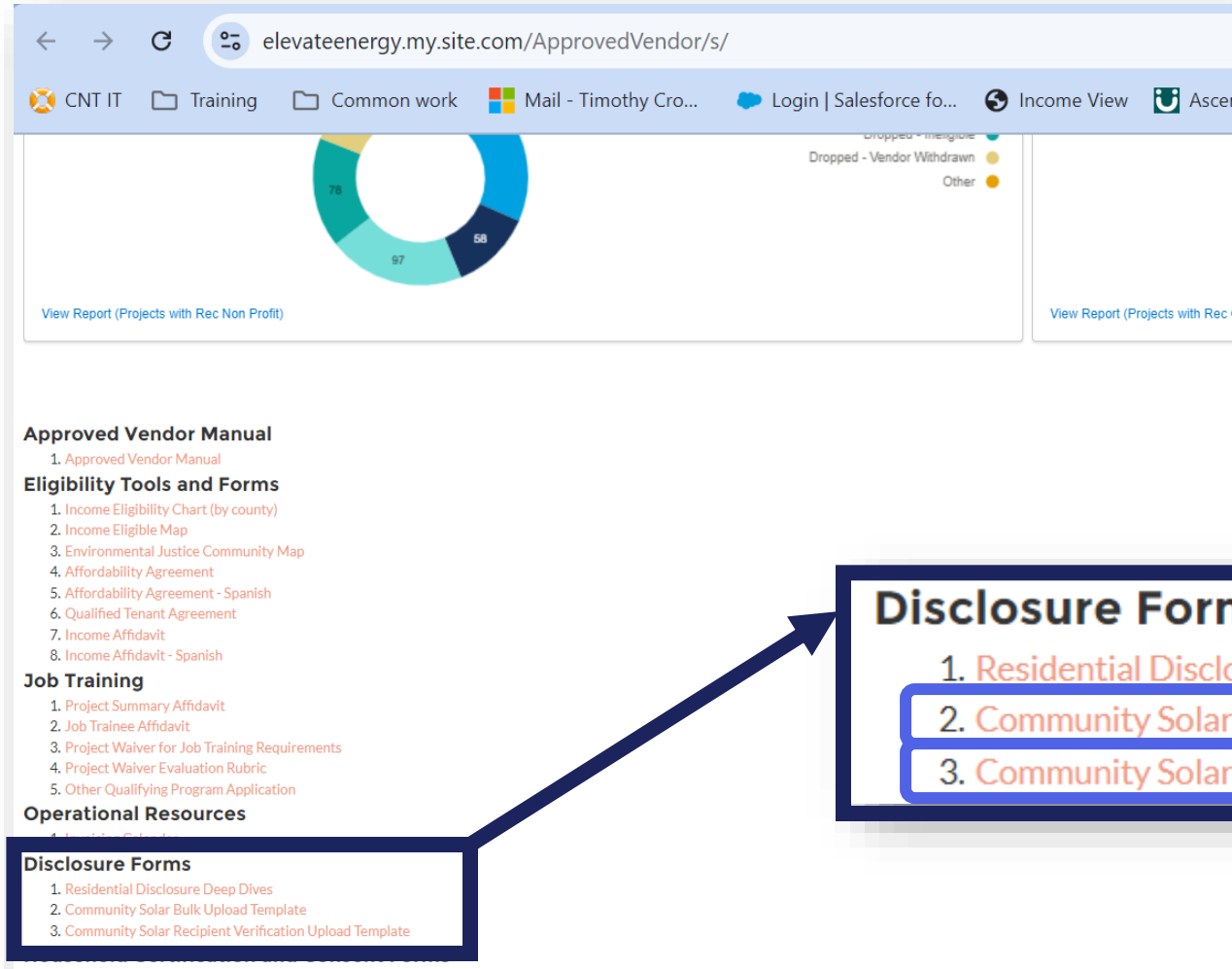
ILSFA Community Solar Anchor Tenant TBD Disclosure Form - v5.pdf



ILSFA Community Solar Anchor Tenant TBD Disclosure Form - v5.pdf



Location of the Revised CS Upload Templates (Salesforce)



The bulk upload templates are used for the CS Residential and Anchor Tenant Disclosure data upload, and now contain data fields to indicate a TBD Disclosure option.

Revised upload templates are available as of October 4, 2024.

Disclosure Forms

1. Residential Disclosure Deep Dives
2. Community Solar Bulk Upload Template
3. Community Solar Recipient Verification Upload Template



How to Complete and Submit the Upload Templates

Optional: If preferred to create the RECIPIENT(S) via the bulk upload process, complete the Recipient Verification Bulk Upload Template.

The ILSFA AV Manager will upload, and the RECIPIENT VERIFICATION ID will be visible on the Project Details Page in the Portal.

The screenshot shows an Excel spreadsheet with the following data:

Project	What would you like to do?	Recipient Verification ID	kW Contracted	First Name	Last Name	Mailing Street
P-3100 - PY3	Create a new Recipient Verification for my project			1 Johnny	Test	1234 Testing Str
	Create a new Recipient Verification for my project		9.6631	Rodrigo	Rusin	349 E 87th Pl
	Create a new Recipient Verification for my project		10.6294	Alexander	Pineiro	9758 S Calumet /
	Create a new Recipient Verification for my project		11.6923	Ignacio	White	8205 S Carpenter
	Create a new Recipient Verification for my project		6	Emilio	Rogers	6559 S Rockwell

How to Complete and Submit the Upload Templates

Complete the CS Bulk Upload Template. (New fields were added in support of the TDB Disclosure form option.)

Refer to the Instructions tab and complete all relevant data fields.

Required	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Help Text	This value is always the same 18-character ID	This is the current Recipient Verification object that references the customer receiving energy and their eligibility qualifications.	List up to 5 projects to which this recipient might be subscribed. Put commas between Project IDs, where there are multiples.	The project used to calculate the recipient savings.	Set this to indicate if the AV will use their own notification process or use the program assisted notification process.	The date the disclosure was affirmed by the recipient.	This should only be "TBD"	
	Record Type	Associated Recipient Verification	Potential Projects	Provisional Project	Notification Method	Signed Date	TBD Offer Status	Program Year
	012VA000000ikvdYAC	RP-08525	P-3110 - PY7, P-3111 - PY7, P-3112 - PY7	P-7937 - PY7	AV Generated Program Assisted			Year 7
	012VA000000ikvdYAC							
	012VA000000ikvdYAC							
	012VA000000ikvdYAC							
	012VA000000ikvdYAC							

How to Manage TBD Notifications

AVs are responsible for notifications to the Recipient every 30 days after the Disclosure signing date, as described in the CP Handbook.



Using the automated email option provided by the Program Administrator for 30-day notifications:

- An optional resource for the AV – **coming soon**.
- For any Recipient that prefers communications via email.
- To elect, AV must indicate in the bulk upload template.



Not using the automated option:

- Use suggested email template on next page.
- AV is required to submit all notifications sent to the Recipient to the Program Administrator via email address: TBDNotifications@illinoissfa.com for monitoring compliance with the CP Handbook.



How to Manage TBD Notifications



Suggested notification language for Email or Direct Mail Letter:

To: [Recipient Name, Email]

From: [Approved Vendor, Email Address]

Subject: " ILSFA Solar Subscription Status Update"

Template / Content: "We appreciate your interest in participating in the ILFSA Community Solar program. Your subscription is still pending as we are working to determine which project will serve your needs best. Once you are assigned to a project, we will notify you with the project identification number, name, and location within 14 days of assignment. If you have any questions, you can contact me at [AV Contact Name, Phone Number, Email]."



Edited Bulk Upload Template

The CS Edited Bulk Upload Template (**Coming Soon Q4 2024**) will be used to communicate status changes relevant to:

- TBD Disclosure Cancellation
- TBD Disclosure Extension
- Project Assignment



Edited Bulk Upload Template - Cancellations

When cancellation is offered



- If the Recipient has not been assigned to a project within 180 days (plus any approved extension), the AV **must offer** cancellation to the Recipient.

How – steps to take when cancelling



With the Recipient:

- Notify the Recipient of the cancellation (see next slide for example language).
- Provide the Recipient with a listing of potential CS Projects and AVs to work with (<https://www.illinoissfa.com/approved-vendors/>).

With the Program Administrator:

- Indicate the TBD Disclosure status as ‘canceled’
- Provide a cancellation date in the CS edited bulk upload template (**Coming Soon**).



Edited Bulk Upload Template - Cancellations



Suggested cancellation notification language for Email or Direct Mail Letter:

To: [Recipient Name, Email]

From: [AV Contact Name, Email]

Subject: [ILSFA Solar Subscription Cancellation]

Template / Content: "We appreciated your interest in participating in the ILSFA Community Solar program. We cancelled your subscription due to the unavailability of a project for assignment. You may be interested in signing up for a subscription to a community solar project through another vendor. See Community Solar Offers Document, <https://www.illinoissfa.com/approved-vendors/>. If you have any questions, you can contact me at [AV Contact Cell, Email]."



Edited Bulk Upload Template - Extensions

When

- The AV must identify TBD Recipient(s) for which it wishes to extend the assignment deadline prior to the 14th day prior to the 180-day deadline (166 days post-disclosure signing date).
- If approved, the AV would have 210 days post-signing date to assign the TBD Recipient to a project.



How

- The AV will complete the TBD Extension Request Form and submit the form to the Program Administrator via email address: TBDExtensions@illinoissfa.com.
- The AV will notify the Program Administrator in the edited bulk upload template (**Coming Soon**) by indicating the status to 'extend' and providing the extension date associated to the form.



A note about requirements: The ILSFA AV Manager will:

- Review the extension request to ensure extension requirements are met.
- If requirements **are met**, update Salesforce with the extension approval date and notify the AV.
- If requirements **are not met**, will notify the AV of the discrepancy and the option to resubmit the request.



Edited Bulk Upload Template – Project Assignment

Notifying the TBD Recipient

When a TBD Recipient has been assigned to a specific project, the AV must notify the Recipient:

- No later than 14 days after project assignment
- Via the Recipient’s preferred communication method, email or hard-copy mail.
- Provide the following project details, in alignment with the CP Handbook:
 - Project location, including the county in which the project is located
 - Project name (as that project’s name appears in the ILSFA Salesforce portal)
 - Project ILSFA identification number
 - Project size (in kW AC)
 - AV name and contact information, if different than the entity sending the communication
 - CS Provider name and contact information, if different than the AV
 - Project Status (one of the following):
 - Completed and producing energy
 - Completed and awaiting final approval to operate
 - Under construction
 - Construction not yet commenced



Edited Bulk Upload Template – Project Assignment

Notifying the Program Administrator

When a project has been assigned to a TBD Recipient, the AV must:

- Submit the edited bulk upload template **(Coming Soon)**
 - mark the TBD Disclosure status as ‘assigned’
 - provide the assignment date
 - Provide the project ID
 - Provide the project
- If required, submit a new Disclosure Form (reference standards rules in the Illinois Shines Manual for guidance).
- Submit Recipient notifications to the Program Administrator via email address: TBDNotifications@illinoissfa.com for monitoring compliance in accordance with the CP Handbook.





1. Who should I reach out to with questions?

- Your AV Manager:
Timothy Crowder, Timothy.Crowder@elevatenp.org
Marty Black, Marty.Black@elevatenp.org
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2. When is this going to be available?

- October 4, 2024 – CS Bulk Upload and Recipient Verification Templates
- Coming Soon in Q4 2024 – Automated notification option
- Coming Soon in Q4 2024 – Edited Bulk Upload Template

Thank you!

