

Training Support for Disclosure Form Upload Template

The below information outlines how to use the Illinois Solar for All Disclosure Form Upload Template, available from January 7, 2025. Please see the detailed training video for a visual walkthrough of the template and additional information.

Introduction and Purpose of Template

The template supports Illinois Solar for All: Non-Profit and Public Facilities projects and Residential Solar (Small and Large) projects. It ensures the accurate and streamlined upload of new Disclosure Form data while portal changes are completed.

- **Intended Use:** Approved Vendors fill out and submit this template specifically for new Residential Solar (Small and Large) and Non-Profit and Public Facilities Disclosure Forms.

Template Tips

- **Review Instructions Tab:**
 - Provides tips and guidance for filling in the template fields correctly.
- **Use the Helper Text Row:**
 - This is equivalent to hovering over question mark icons in the portal and provides additional context for specific fields.
- **Use Microsoft Excel “Freeze Panes” feature:**
 - Freezing specific rows or columns so they are always visible when scrolling can better ensure correct input across template rows and columns.
- **Fields Overview:**
 - Fields are organized by columns, with instructions on whether they are required.
 - Drop-down menus are provided for ease of selection in certain fields.

- **Complete Required Fields:**
 - Row 2 indicates whether a field is required based on specific conditions.
 - Missing required fields will be flagged by Approved Vendor Managers, causing delays in Disclosure Form creation.
- **Customer and Account Tab:**
 - Use this tab for creating new customer or Approved Vendor profiles or accounts not already in the portal.
 - Includes fields such as name, email, address, and phone number.

Guidelines

- **Submission:**
 - Complete the Disclosure Form template.
 - Save the document to a preferred location.
 - Email the completed form to vendors@illinoissfa.com.
- **Post-Submission:**
 - Approved Vendor Managers provide the Disclosure Form IDs to Approved Vendors within one business day.
 - Approved Vendors review the Disclosure Form in the portal for accuracy.
 - This is a critical step to reduce re-work. If edits are needed after a form is sent for signature, a new form will need to be generated by the Approved Vendor Manager team.
 - Any errors or clarifications are communicated to Approved Vendor Managers for resolution prior to sending the form for signature.
 - Approved Vendors send new Disclosure Form for signature from the portal.

Support and Assistance

- Vendors can contact their assigned Approved Vendor Manager for guidance during the upload process.
 - Please cc vendors@illinoissfa.com in these communications.
- Upload concerns or errors in the Disclosure Form should be communicated via email to vendors@illinoissfa.com
- Office hours will be conducted twice weekly for additional support.

Please ensure the accuracy and completeness of the template to avoid delays in processing.