



Designee Management Plan



Overview

As of September 1st, 2023, all Approved Vendors, like Halo Solar LLC, are responsible for managing and actively supervising Designees to ensure compliance with Illinois Shines Program requirements. Below, we have outlined our plan to manage all Designees and Nested Designees to ensure that all Program requirements are met.

VETTING NEW DESIGNEES

When vetting new Designees, Halo Solar will take the following steps to ensure that these entities can be trusted partners in the Program.

1. If the potential Designee will be installing systems for Halo Solar, we will first verify whether the potential Designee is registered as a Distributed Generation Installer with the Illinois Commerce Commission. If they are not registered as a DG installer with the ICC, Halo will not allow them to work independently on any installation until the certification is received.
2. Next, we will verify whether the potential Designee has a Certificate of Good Standing with the State of Illinois. If the potential Designee does not have this documentation, Halo Solar will require that they obtain this certificate prior to moving forward with the Designee enrollment process.
3. If the potential Designee has been a Designee in the past, we will verify with the Program Admin whether this entity has had any Program violations. From this information, we will assess whether we feel it is reasonable to proceed.
4. Once we have assessed the credentials listed above, we will provide information to the potential Designee on the requirements, reports, and documentation necessary to become and remain a Designee in the Program, including Minimum Equity Standards, to assess whether the entity is willing to meet all requirements.
5. If all of the above criteria are met, and we determine that this entity can be trusted to work with us in the Program, Halo Solar will proceed by sending over our Subcontract Agreement and a Designee Request Form for the entity to sign.

ONBOARDING AND EXPECTATIONS FOR NEW DESIGNEES

When a new Designee begins working with Halo Solar, they will be required to sign our Subcontract Agreement and the Designee Request Form, and review all Program Documents and Halo training materials that are relevant to their work prior to doing any work in the Program. Those documents are listed below.

Expectations

Halo Solar Subcontract Agreement

Halo Solar Agreement to Comply with Terms of the Illinois Shines Program

Designee Request Form

Program Documents

- [ABP Program Guidebook](#)
- [ABP Consumer Protection Handbook](#)
- [ABP DG Contract Requirements](#)
- [ABP Program Brochure](#)
- [ABP Guide to Going Solar](#)

Halo Training Materials

- Halo Consumer Protections and MES Training Video
- Halo Field Install Guide *
- Halo Solar Installation Training Resources *

*if applicable

REVIEWING DESIGNEE MARKETING MATERIALS, SCRIPTS, AND CHANNELS

When a new Designee begins working with Halo Solar, they are required to sign our Subcontractor Agreement contract. In this contract, Halo Solar requires that any marketing materials, scripts, or channels that mention Halo Solar or IL Shines be reviewed by the Halo team before being finalized and released to the public view. Materials will be sent to the Halo team via email, and will be reviewed for proper language in accordance with the IL Shines Consumer Protections Handbook. If the material does not adequately meet IL Shines Consumer Protections standards, the Halo team will respond to the Designee with the needed adjustments and the material will be reviewed again prior to being finalized.

CRITERIA FOR REVIEWING DESIGNEE ENROLLMENT PROCESSES

As of the creation of this Designee Management Plan, Halo Solar is conducting all enrollment processes internally - including the generation and signing of Disclosure Forms and execution of contracts. Designees enrolled under Halo Solar will not be submitting any Program documentation on Halo Solar's behalf.

ENSURING ADEQUATE TRAINING OF DESIGNEE EMPLOYEES AND AGENTS

When a new Designee begins working with Halo Solar, at least one representative from their team will be required to review all Program Documents and Halo training materials that are relevant to their work prior to doing any work in the Program. Those documents are listed below.

Program Documents

- [ABP Program Guidebook](#)
- [ABP Consumer Protection Handbook](#)
- [ABP DG Contract Requirements](#)
- [ABP Program Brochure](#)
- [ABP Guide to Going Solar](#)

Halo Training Materials

- Halo Consumer Protections and MES Training Video
- Halo Field Install Guide *
- Halo Solar Installation Training Resources *

*if applicable

Once all materials are reviewed, the Designee's representative will be required to sign and submit an attestation form to Halo Solar. These materials must be reviewed, and a new attestation submitted at the beginning of each Program year.

REGULAR COMMUNICATIONS BETWEEN HALO SOLAR AND DESIGNEES

All Designees will be required to subscribe to Program email updates so that they receive necessary communication regarding Illinois Shines. Halo Solar also has a Designee Portal on our website with up-to-date resources and important dates for Designees to reference. When Halo Solar is utilizing a Designee to install a project, communications with that Designee will occur at minimum once per week, either by email or video call, to relay project updates and expectations. Two months prior to the middle of each Program year and the end of each Program year, Halo Solar will reach out to all Designees to inform them of the expectations involved with reporting, and check in on their Minimum Equity Standards progress. Once a new Program year has started, Halo Solar will again reach out to provide updated Program materials, training, and training attestation items.

REQUIREMENTS TO ENSURE DESIGNEES SUBMIT PROJECT APPLICATION MATERIALS IN A TIMELY MANNER

When an entity becomes a Designee under Halo Solar, they are required to sign Halo's Designee Contract. In this contract, they must attest that they will provide all necessary application materials within 1 week of the completion of any solar installation. If they fail to provide this material within the week allotted, Halo Solar will reach out to the Designee to understand why the material was not provided. If the material is not provided a week after being contacted, or a reasonable explanation is not given, they will be given a warning. If a Designee receives 3 warnings, Halo Solar will remove them as a Designee.

REPORTING CUSTOMER COMPLAINTS

Halo Solar has a [Consumer Complaint](#) form available on our website. If a Designee would like to report a customer complaint, they are encouraged to fill out that form, or send an email to someone on the Halo Solar Team. Designees and customers are also made aware of the Consumer Protections Complaint Center on the IL Shines website.

RESPONDING TO DESIGNEE'S VIOLATIONS OF PROGRAM REQUIREMENTS

If a Designee is in violation of Program requirements, Halo will notify the Illinois Shines Program Administrator for guidance on how to handle the situation.