Monitoring-Based Commissioning Application

Monitoring-Based Commissioning (MBCx) Program:
Ameren Illinois is offering financial support for monitoring-based commissioning of HVAC, industrial and other systems. Eligible MBCx systems will collect and trend key data points and include an analytic software package capable of identifying energy savings opportunities. **Preapproval is required to receive this offer.**

Does your facility/project qualify?

- ☐ Monitoring-Based Commissioning software and equipment must be installed to identify energy efficiency measures through a structured monitoring plan, with results reported by a qualified Retro-Commissioning Service Provider (RSP), and the intent to implement energy saving projects.
- ☐ Monitoring-Based Commissioning software and equipment must provide sufficient energy savings and other data for the customer to decide whether to move forward with energy saving projects.
- ☐ Monitoring-Based Commissioning software and equipment must be installed at a business, commercial/industrial, or other non-residential facility by a qualified Retro-commissioning Service Provider (RSP).
- ☐ Electric projects: electric delivery service rate DS2, DS3, DS4, DS5, or DS6 and Energy Efficiency Demand Response surcharge on Ameren Illinois bill for the service point corresponding to the electric project. If the account is opted out of the Energy Efficiency Programs for 2026, you will be ineligible to participate in Ameren Illinois' Energy Efficiency electric program.
- ☐ Gas projects: gas delivery service rate GDS2, GDS3, GDS4, GDS5, or GDS7 and Energy Efficiency Programs Charge on Ameren Illinois gas bill for the service point corresponding to the gas project.
- ☐ Monitoring-Based Commissioning equipment to be installed on or after January 1, 2026 and by December 31, 2026.
- ☐ Measures must be (1) self-installed by an employee of the Ameren Illinois customer listed on this application, or (2) installed by an Illinois Commerce Commission-approved Certified Installer to qualify for an incentive. Certification of the self-installation or evidence of installation by a Certified Installer will be required. A complete list of Certified Installers can be found at http://www.icc.illinois.gov/emdb/ucdb/search by choosing Authority Type, 'Energy Efficiency Installers.'
- ☐ **Please save a copy of this form to your computer and use Adobe Acrobat to complete the document. Most browsers (Chrome, Internet Explorer, Safari) do no auto-fill calculations.**

Incentives:

- ☐ **Base incentive**: lesser of **60%** of the Monitoring-Based Commissioning installed costs, or **$20,000**. Paid once new Monitoring-Based Commissioning software and equipment is installed.
- ☐ **Performance incentive**: **$0.15/kWh** or **$0.20/therm** saved based on annual energy savings generated by projects identified and implemented via Monitoring-Based Commissioning. Capped at Monitoring-Based Commissioning installed costs. Not combinable with other energy efficiency program incentives.
- ☐ Total maximum for Base and Performance incentives is the system cost.

What should you know before beginning?

- ☐ Preapproval is required for ALL Monitoring-Based Commissioning applications.
- ☐ Existing HVAC controls must have significant remaining useful lifetime and be able to interface with software and equipment. If controls need updating/replacing, please submit a Custom Application.
- ☐ Performance incentives are available for up to two years after the Base incentive check is approved.
- ☐ Submitted projects must be completed within the current or following two program years (unless an exception is granted by Energy Efficiency staff).
- ☐ Only external labor costs can be incentivized; internal labor is not eligible.
- ☐ Monitoring-Based Commissioning Performance incentives cannot be combined with the Feasibility Study.
- ☐ Single customers/companies are limited to three applications during the effective dates listed. Quantity caps may be lifted by Program Management for installations that generate savings.
- ☐ Individual Program Allies are limited to three applications during the effective dates listed. Quantity caps may be lifted by Program Management for installations that generate savings.
- ☐ Application paperwork can be submitted via email or hard copy. Do not submit "zip" files. You will receive a confirmation email within two business days of submitting a complete and correct application.

Monitoring-Based Commissioning Application

Participation Instructions

Step	Description	Timeline
1 **Preapproval and Base Incentive**	Select a registered retro-commissioning service provider (RSP; *see page 3*). Create a monitoring plan (*page 3*). Submit this application, including rows A, B and C of Table 2, Table 3, and signed Terms of Agreement (*page 8*), along with the monitoring plan. Do not purchase any material or generate purchase orders until a preapproval letter is issued. Notify the program of any changes to project scope after submittal. After receiving preapproval, install equipment and software. Submit the Incentive Payment Request form (*page 9*), checking the box for base incentive, within 30 days of equipment installation or by **December 31, 2026**, whichever comes first.	3 to 4 weeks
2 **Trend and Report**	Begin data collection and trending. Submit a savings opportunity report every six months (at minimum).	Every 6 months
3 **Implement and Verify**	At least two weeks after submitting a savings opportunity report, schedule and conduct an Implementation Plan meeting. RSP will present retro-commissioning energy savings opportunities. Energy Efficiency representative will provide guidance on eligibility and verification. Customer will approve a set of opportunities to implement. Customer will notify Energy Efficiency representative and RSP after implementation. RSP will verify savings and submit verification documentation to Energy Efficiency program. Follow these links for **implementation plan** and **verification step**.	2+ weeks
4 **Repeat**	Repeat steps two and three until retro-commissioning savings opportunities are exhausted (projects with ≤ 2 year payback). Submit opportunity reports, hold implementation plan meetings, implement and verify savings. Submit Custom applications for projects with > 2 year payback.	Every 6 months
5 **Technical Review and Performance Incentive**	Submit a revised copy of this application, with rows E, F and G from Table 2, and a signed Incentive Payment Request Form with box checked for performance incentive. Include Verification Report and invoices.	Allow 6 to 8 weeks for final processing

Monitoring-Based Commissioning Application

Retro-Commissioning Service Providers (RSPs)

What is an RSP?

- An RSP is a consulting firm or design build contractor with skills and experience in retro-commissioning (RCx).
- Approved RSPs are registered with the Ameren Illinois Energy Efficiency program to assist in the delivery of this program to Ameren Illinois customers.

How does a customer select their RSP?

- Customers typically have an ongoing relationship with an RSP and use this program to implement no-cost/low-cost energy efficiency measures and develop a game plan for future capital improvements.
- Customers who do not have a current relationship with an RSP can work with Energy Efficiency program staff to select an approved RSP that meets their needs.
- Customers who have an ongoing relationship with a firm they would like to use as an RSP can work with Energy Efficiency program staff to obtain approval to use their desired service provider.

What can a customer expect from their RSP?

- Appropriate skills and experience to perform an RCx audit of their facility.
- Solid understanding of the retro-commissioning process.
- Proven experience in successfully completing retro-commissioning projects through the Ameren Illinois Energy Efficiency Program.

Who are the current RSPs?

- The current list of approved RSPs is available at: www.amerenillinoissavings.com/business/retro-commissioning/

Please contact program representatives with questions: IllinoisBusinessEE@ameren.com or 1.866.800.0747

Monitoring Plan

A structured Monitoring Plan is the cornerstone of the incentive. The plan should be created by the customer and their selected RSP, with input from a program Energy Advisor. The plan should describe the need for the Monitoring-Based Commissioning, the project(s) to be investigated, data to be collected, and any proposed solutions or outcomes.

The plan should:

- Formalize objectives and goals of monitoring: identify and confirm goals of stakeholders/users; prioritize goals as near-term, mid-term, and long-term; formalize necessary/expected outcomes.
- Develop plan structure: identify data and analysis needs based on necessary outcomes; develop equipment needs based on data needs; take advantage of existing infrastructure; identify responsible staff.
- Develop criteria for evaluation monitoring costs, benefits, and impacts to existing systems, infrastructure, and staff: determine relative economics of proposal; justify cost/benefit, return on investment, or payback metric.
- Develop a prioritized implementation plan targeting manageable successes: screen opportunities based on success potential.
- Develop a sustainable plan targeting use, updates, calibration, maintenance, and program reinvestment: maintain your investment; make success visible; plan for future implementation/reinvestment.
- Measure quantities of a product delivered (e.g., kilowatt-hours of electricity, therms or cubic feet of natural gas, pounds of steam, or gallons of water). May also identify times-of-use for various energy sources, instantaneous demand for energy, as well as energy use for a collection of buildings, individual buildings, rooms, or specific equipment (e.g., a boiler, chiller, or motor).
- Identify selected monitoring-based commissioning software and equipment. Eligible software and equipment includes:
  - Any installed meter or data logger that will allow the customer to more carefully track energy consumption (not restricted to electric and gas meters; could include measurement of steam generation or process flow, for example),
  - Communication media for the sole purpose of metering,
  - Software for real time and historical analysis of energy related data,
  - Existing metering system expansion that incorporates new meter points or adds desirable functionality.

Monitoring-Based Commissioning Application

Customer and Project Information

Red indicates a required field.

Table 1 - Ameren Illinois Customer Information

Customer Name on Ameren Illinois Account	Customer tax status:	Ameren Illinois Electric Account Number:* / Ameren Illinois Natural Gas Account Number:*
Signed W-9 form is required documentation Click here for a blank W-9 form	☐ Taxable/non tax-exempt ☐ Government ☐ 501(c)(3) ☐ Other tax exempt	*Both electric and gas account numbers are required if you are an Ameren Illinois electric and gas customer.

Payment Remit To Mailing Address	City	State	Zip

Participant Contact Name	Title

Participant Email	Phone (XXX) XXX-XXXX	Ext.	Fax (XXX) XXX-XXXX

Secondary Participant Contact Name (if applicable)	Phone (XXX) XXX-XXXX	Email

Physical Installation Address (if different than above)

Installation Address	City	State	Zip
		IL	

Check one: ☐ Owner ☐ Tenant

Name(s) of the person(s) who referred you to the Ameren Illinois Energy Efficiency Program for this project:

Name of Ameren Illinois or Energy Efficiency Employee	Name of Referring Contractor or Program Ally

Company Used for Metering & Monitoring Software

Company Name	Contact Name	Contact Title

Mailing Address	City	State	Zip Code

E-mail Address	Phone (XXX) XXX-XXXX	Fax (XXX) XXX-XXXX

Facility/Project Description

Facility Type (check one):

☐ Office
☐ Medical
☐ Restaurant
☐ Grocery
☐ School/College
☐ Other (please specify below):
☐ Warehouse/Distribution
☐ Retail/Service
☐ Manufacturing/Industrial
☐ Hotel/Motel
☐ Multiple

If Manufacturing/Industrial, specify type:

☐ Food Processing
☐ Automotive/Transportation/Infrastructure
☐ Other (please specify):

Facility Size (total interior square feet served by the account number provided above):

Newer versions of the application forms posted to the Ameren Illinois Energy Efficiency website supersede all previous versions. The revision number is listed in the footer of each page. The version of the application that was available at the time you submitted your pre-approval application will apply.

Monitoring-Based Commissioning Application

Incentive Calculation

Table 2 – Monitoring-Based Commissioning Incentive Calculation			
Complete rows A, B and C to estimate your base incentive for preapproval. When the first year of Monitoring-Based Commissioning has been completed, complete row D to be included in your performance incentive application. Once you have identified and completed subsequent projects, complete rows E, F, and G to be submitted with your performance Incentive Payment Request.			
A	$		Anticipated Monitoring-Based Commissioning cost
B	$		60% of cost from line A
C	$		Maximum possible "base" incentive (capped at the lesser of Line B or $20,000)
D1		kWh	Actual annual energy savings achieved from projects resulting from the installation of the Monitoring components.
D2		therms	
E	$		Potential "performance" incentive = ($0.15 X Row D1 + $0.20 X Row D2)
F	$		Maximum possible "performance" incentive (capped at System Cost)

Table 3 – Impact Questionnaire
Without the requested incentive funds, this project would not be completed because:

Customer Commitment

You must complete the following and submit it with your application to be eligible for incentive payment. Completing this section indicates that the Ameren Illinois customer is committed to completing all satisfactory projects that are identified by the Monitoring Plan**. Incompletion of identified projects may forfeit performance incentives.**

What simple payback period would be necessary for you to complete the project(s) identified through Monitoring-Based Commissioning?

- ☐ **0-12 month payback** *(may be eligible for performance incentives through this application)*
- ☐ **1-2 year payback** *(may be eligible for performance incentives through this application)*
- ☐ **2-5 year payback** *(may be eligible for incentives by submitting a Custom application)*
- ☐ **5-10 year payback** *(may be eligible for incentives by submitting a Custom application)*
- ☐ **10-15 year payback** *(may be eligible for incentives by submitting a Custom application)*

What other requirements or criteria would the Monitoring Plan need to address in order for customer to move forward with energy saving project(s) that are identified?

Monitoring-Based Commissioning Application

Terms and Conditions

1. **DEFINITIONS**: Capitalized terms used but not defined elsewhere herein shall have the following meanings:

a) **"Ameren Illinois"** shall mean Ameren Illinois Company d/b/a Ameren Illinois.

b) **"Application"** shall mean the Customer completed program application used to apply for the specific Ameren Illinois incentive, these Terms and Conditions, and any other supplemental documentation.

c) **"Retro-commissioning"** shall mean those projects that are found on the Large Facility, Industrial, or Retro-commissioning Lite applications

d) **"Customer"** shall mean an Eligible Customer who has submitted an Application.

e) **"Custom Initiative"** shall mean those projects that are not Standard, Retro-commissioning, or Streetlighting Initiatives. Projects that are found on New Construction Lighting, Metering & Monitoring, and Feasibility Study are also part of the Custom Initiative.

f) **"EEM"** shall mean energy efficiency measures.

g) **"Eligible Customer"** shall mean a non-residential electric and/or gas customer of Ameren Illinois that own and install a Qualifying EEM at the Facility corresponding to the Ameren Illinois account number. Each program application has different eligibility requirements for Delivery Service rates (DS# for electric, GDS# for gas) to be eligible for that program. Refer to the specific program application to determine if your business is eligible for that application.

h) **"Facility"** shall mean a single premise that, in general, consists of a contiguous tract of land separated by nothing more than a street, alley, or railroad right-of-way, where all buildings and/or energy-consuming devices are owned by a single Customer.

i) **"New Construction"** shall include construction of new buildings, change-of-use of existing buildings or land, additions to existing buildings, or when two or more building systems are renovated, such as shell and heating, heating and lighting, etc.

j) **"Preapproval"** shall mean written notification via a preapproval letter to Customer that Ameren Illinois has reviewed Customer's Application and determined that the project meets the program eligibility requirements for a maximum preapproved incentive amount if the project is completed by the estimated completion date and all final application paperwork is submitted and approved.

k) **"Program Bonus"** shall mean any seasonal, temporary, or promotional additional incentive paid by Ameren Illinois to Customer.

l) **"Qualifying Energy Efficiency Measures (EEMs)"** shall mean either (i) standard gas or electric EEMs (i.e., measures found on any of the Standard Initiative applications); or (ii) measures eligible under the Custom Initiative approved by Ameren Illinois; or (iii) measures found in the Streetlighting or Retro-commissioning Initiative as identified in official program materials found on the Ameren Illinois Energy Efficiency website. The following technologies are not Qualifying EEMs: (i) technologies that do not demonstrate measurable and verifiable energy savings, including power conditioning; (ii) technologies that displace electrical energy use or natural gas to another fuel (i.e. fuel switching); or (iii) renewable energy projects (solar, wind power, etc.). Eligible gas measures do not include propane or butane measures.

m) **"Standard Initiative"** shall mean those projects associated with standard gas or electric EEMs. Standard Initiative includes the following: Lighting (not New Construction Lighting), VFD, HVAC, Specialty Equipment, Equipment Installation, Smart Thermostat, Steam Trap and/or Leak Survey and Repair. See the Ameren Illinois Energy Efficiency website for individual program applications (AmerenIllinoisSavings.com).

n) **"Streetlighting Initiative"** shall mean those projects that are found on the Ameren Illinois owned and Municipal-owned streetlighting applications

2. **PREAPPROVAL, INSPECTIONS AND FINAL APPROVAL**:

a) For all projects, Ameren Illinois is not obligated to award any incentive payment unless an Application is submitted and Preapproval is granted. Ameren Illinois will not pay incentives for any EEMs ordered or any purchase order generated prior to the date of the Preapproval letter, unless the requested incentive is less than $15,000 on any Standard Initiative Application. Preapproval reserves incentive funds for a period up to the estimated completion date provided in the Preapproval letter. After the estimated completion date, Ameren Illinois may revoke the Preapproval letter and reserved incentive funds. Customer is responsible for ensuring that the project is completed by the estimated completion date, the Application is complete and accurate, and the project meets program eligibility requirements in order to receive final approval and the incentive payment.

b) A preapproval inspection and post-installation inspection of the project may be required before an incentive payment is made.

c) Ameren Illinois reserves the right to request additional supporting documentation as deemed necessary to ensure program eligibility and verify that the expected energy savings will occur.

3. **INCENTIVE PAYMENT AMOUNTS**:

a) Incentive caps are defined as follows:

i) Standard, Custom, Retro-Commissioning, and Streetlighting Applications: Electric incentives over $500,000 are likely to be reduced from the full incentive rate based on available program budget. Gas incentives are capped at $250,000 per project.

ii) New Construction Lighting, Feasibility Study, Leak Survey and Repair, Strategic Energy Monitoring, Small Business Direct Install, and Metering & Monitoring incentives are capped all capped at lower amounts. Please see individual program applications for further details.

b) Ameren Illinois reserves the right to adjust the incentive amount, based upon its independent assessment of appropriate savings or cost estimates.

c) Ameren Illinois will pay no more than the incentive amount in the Preapproval letter.

d) Ameren Illinois reserves the right to cap incentives at $15,000 for Standard Initiatives that did not obtain Preapproval.

e) The sum of all Incentives and any applicable Program Bonuses for Standard Initiative, Custom Initiative, or Streetlighting Initiative will be capped at the project cost, which includes material cost and external labor cost. Internal labor cost is not considered in the project cost. Steam Trap Surveys are eligible for incentives when internal labor is used according to the Steam Trap Application.

4. **MONITORING AND EVALUATION**: Customer grants Ameren Illinois and any of its agents, the right to make follow-up visits, inspections, metering, data collection and/or surveys of the Customer's Facility during the 36 months following the completion date of the project to verify

the installation and performance of the EEMs that were funded by incentives upon reasonable notice to Customer. If Customer removes the EEMs at any time or Customer ceases to be a delivery service customer of Ameren Illinois within 36 months after installation, Ameren Illinois shall be entitled to recover from Customer the total amount of incentive payments made plus interest.

5. **CUSTOMER DATA**: By submitting an Application, Customer understands and authorizes Ameren Illinois and its third party providers and agents to retain Customer's Application, and use, store and share the information contained in the Application, together with such data and documentation collected in connection with the project, for the program and its internal business purposes. Customer agrees that Ameren Illinois may share such information with the Illinois Commerce Commission, or its contractors, who plan to evaluate my energy usage. Ameren Illinois may release aggregated, non-identifiable data to third parties for regulatory and non-regulatory purposes.

6. **CUSTOMER SHALL PAY ALL TAXES**: Incentive payments received by Customer or any third party payee designated by Customer on a Payment Release Authorization Form may be taxable by the federal, state, and local government. Customer is responsible for declaring and paying all such taxes, regardless of who receives the incentive.

7. **REMOVAL OF EXISTING EQUIPMENT**: Customer agrees, as a condition of participation in the program, to remove and dispose of any equipment being replaced by the EEMs in accordance with all applicable laws, rules, and regulations. Customer further agrees not to reinstall any replaced equipment or transfer it to any other party for installation in Illinois.

8. **OWNERSHIP**:

a) EEMs purchased and installed with incentives provided by this program, and all energy savings realized from the installation of such EEMs, are the property of Customer.

b) In consideration of the incentives provided by this program, Customer agrees that Ameren Illinois is entitled to all rights to any system capacity and environmental credits and attributes that may be associated with EEMs for which incentives from Ameren Illinois were received, and Customer waives, and agrees not to seek, any right to the same.

9. **CHANGES OR CANCELLATION OF THE PROGRAM**:

a) Ameren Illinois, in its sole discretion, may change any of the terms and conditions of the program, suspend acceptance of Applications, deny Applications already received and not yet preapproved or terminate the program at any time without prior notice.

b) In the event of program change or cancellation, Applications that have been preapproved will be processed to completion under the program requirements and Terms and Conditions in effect at the time of Preapproval by Ameren Illinois.

c) Incentives under the program are offered on a first-come, first-served basis and are subject to project eligibility and the availability of funds.

10. **LIMITATION OF LIABILITY AND INDEMNIFICATION**:

a) AMEREN ILLINOIS' TOTAL LIABILITY TO CUSTOMER UNDER THESE TERMS AND CONDITIONS, OR ANY OTHER REQUIREMENT OF CUSTOMER'S APPLICATION OR CONDITION OF INCENTIVE AWARD SHALL BE LIMITED TO PAYMENT OF THE AMOUNT OF THE INCENTIVE PAYMENTS DUE TO CUSTOMER IN THE APPLICATION OR PREAPPROVAL LETTER ACCORDING TO THE PROGRAM. AMEREN ILLINOIS, ITS PARENT, AFFILIATES AND SUBSIDIARIES, AND THEIR DIRECTORS, OFFICERS, EMPLOYEES, CONTRACTORS OR AGENTS SHALL NOT BE LIABLE TO THE CUSTOMER FOR THE CUSTOMER'S FAILURE TO ACHIEVE ANY RESULTS IN ENERGY SAVINGS; THE OPERATION OF THE CUSTOMER'S FACILITY; LOSS OF PROFITS OR REVENUE; LOSS OF USE OF CUSTOMER'S PROPERTY, EQUIPMENT OR POWER SYSTEM; INCREASED COSTS OF ANY KIND, INCLUDING BUT NOT LIMITED TO CAPITAL COST, FUEL COST AND COST OF PURCHASED OR REPLACEMENT POWER; OR ANY SPECIAL, INDIRECT, CONSEQUENTIAL OR INCIDENTAL DAMAGES WHATSOEVER IN CONNECTION WITH CUSTOMER'S APPLICATION, CUSTOMER'S PARTICATION IN THE PROGRAM, ANY EEMS INSTALLED AT CUSTOMER'S FACILITY OR ANY ACTIVITIES ASSOCIATED WITH THE PROJECT. BY PARTICIPATING IN THE AMEREN ILLINOIS PROGRAM, CUSTOMER AGREES TO WAIVE ANY CLAIMS, EXCEPT AS PROVIDED IN THIS SECTION, AND FULLY RELEASES AMEREN ILLINOIS FROM ANY DAMAGES, OF ANY KIND ARISING OUT OF OR RELATED TO CUSTOMER'S APPLICATION AND ANY EEMS INSTALLED AT CUSTOMER'S FACILITY.

b) Customer shall defend, indemnify, and hold harmless Ameren Illinois, its parent, affiliate and subsidiaries, and their representative directors, officers, employees, contractors and agents from and against all liabilities, losses, claims, damages, judgments, penalties, costs and expenses (including, without limitation, attorney's fees and expenses) from and against third party claims for injuries, including death, to any person, or for property damage, or for payment for goods or services arising out of or relating to Customer's Application or any EEMs installed at Customer's Facility.

11. **NO WARRANTIES**: Ameren Illinois and its parent, affiliates, employees, contractors and agents do not guarantee the energy savings, and do not make any representations or warranties of any kind, regarding the results to be achieved by the EEMs or the adequacy or safety of such measures. Ameren Illinois and its parent, affiliates, employees, contractors and agents do not endorse, guarantee, or warrant any particular manufacturer, contractor or product, and do not endorse or guarantee any claims, promises, work, or equipment made performed or furnished by any contractors or vendors that sell or install EEMs.

12. **CHOICE OF LAW AND DISPUTES**.

a) THESE TERMS AND CONDITIONS, OR ANY OTHER REQUIREMENT OF THE APPLICATION OR CONDITION OF INCENTIVE AWARD WILL BE GOVERNED IN ALL RESPECTS BY THE LAWS, STATUTES, AND REGULATIONS OF THE STATE OF ILLINOIS. AMEREN ILLINOIS AND CUSTOMER HEREBY IRREVOCABLY AND UNCONDITIONALLY WAIVE ANY RIGHT EITHER SUCH PARTY MAY HAVE TO A TRIAL BY JURY OR TO INITIATE OR BECOME A PARTY TO ANY CLASS ACTION CLAIMS IN RESPECT OF ANY ACTION, SUIT OR PROCEEDING DIRECTLY OR INDIRECTLY ARISING OUT OF OR RELATING TO THIS PROGRAM.

b) Customer agrees that any dispute arising out of or related the workmanship or performance of an EEM or the adequacy or safety or such measure shall be resolved solely between the Customer and the EEM contractor or equipment provider.

13. IF TENANT: If the facility is under lease, the Customer's tenant who controls the Facility, by executing this agreement, assumes the rights and obligations of the Customer hereunder. (Rev18)

Monitoring-Based Commissioning Application

Required Documentation for Application Submission

Document Checklist for All Applications:

- ☐ Completed ***Customer and Project Information*** section (p. 4 of this Application)
- ☐ Completed ***Incentive Calculation*** and ***Customer Commitment*** section (p. 5 of this Application)
- ☐ ***Terms and Conditions Customer Acknowledgment***, below, signed by the Ameren Illinois customer, with the certification box checked.
- ☐ Copy of monitoring-based commissioning proposal showing estimated installed cost of software and equipment
- ☐ Completed ***Monitoring Plan***, per specifications on page 3 of this Application
- ☐ **Signed W-9 form** with Tax Identification Number associated with the Ameren Illinois customer. Incentives WILL NOT be paid until a completed and signed W-9 is received.

Supplemental Required Documentation:

- ☐ **Large Incentive Request Form** is required if the total requested incentive is over $50,000.

Missing a form? Visit AmerenIllinoisSavings.com/forms.

Additional Information for Projects Requiring Preapproval:

Upon receipt of the preapproval letter, Customer should immediately contact a program representative regarding any change to the project scope or timeline (including changes to equipment, project costs, projected energy savings or estimated completion date) to discuss how the change will impact your savings/incentive and the necessary steps required to request incentive changes.

Terms and Conditions Customer Acknowledgment

I certify that all information provided in this Application is correct and complete. I have read, understand and agree to the program requirements and the Terms and Conditions set forth in this Application, and I agree to abide by these requirements.

☐ By checking this box and signing below, I certify that I have authority to make these statements and submit this Application. **Applications will not be accepted as complete, unless this box is checked and all below fields are completed.**

Project Estimated Completion Date (mm/dd/yyyy) _____

Estimated Lead Time for Major Equipment (weeks) _____

Print Name _____ Title _____

Signature _____ Date (mm/dd/yyyy) _____

Application must be signed & dated by the customer contact or authorized third party. Electronic signatures are accepted. Typing your name above constitutes a valid electronic signature.

Monitoring-Based Commissioning Application

Incentive Payment Request

This form is to be submitted upon project completion, defined as all equipment being installed and operable.

Required Documentation Checklist

- ☐ Completed this form? (Signed by the Ameren Illinois customer.)
- ☐ Changes since pre-approval? (If so, submit a written summary of specific changes and their rationale.)
- ☐ Invoices submitted? (Must include date, place of purchase, model/part numbers, quantities and unit costs.)
  - **For Base Incentive**: software and monitoring equipment invoices.
  - **For Performance Incentive:** all invoices related to implementation of identified retro-commissioning projects.
- ☐ Signed W-9 submitted? (Not required for public-sector customers, or if W-9 is already on file.)
- ☐ Installed by ICC certified installer or by the Ameren Illinois customer listed on this application? (www.icc.illinois.gov/emdb/ucdb/search choose Authority Type, 'EnergyEfficiency Installers.')

Performance Incentives: Must be energy-efficiency projects, equipment optimization, or process improvements, and must meet cost-effectiveness and technical criteria. If you are unsure about eligibility, call 1.866.800.0747 to speak with a representative. Ameren Illinois reserves the right to determine whether or not project(s) are satisfactory.

Payment Information (check one option):

☐ Payment to the Ameren Illinois Customer listed on Page 2 of the application.

☐ Payment to Other Party:

By my signature in the certification section, below, I (Ameren Illinois Customer) authorize payment to the following entity. I understand and agree that I will not receive the incentive payment from Ameren Illinois, and that my release of payment to a third party does not exempt me from the Program requirements and Terms and Conditions of this application.

Payee Company Name:_____

Mailing Address: _____ **City:** _____**State:** _____ **Zip:** _____

Contact Name:_____ **Title:** _____

Email: _____ **Phone:** _____ **Fax:** _____

Customer Certification

I certify that all information provided is correct and complete. I have read, understand and agree to the program requirements and the Terms and Conditions set forth in this Application, and I agree to abide by these requirements. By signing below, I certify that I have authority to make these statements and submit this Application. All equipment is installed and operational.

Company Name (Ameren Illinois Customer): _____

Project Number (Preapproved Projects Only):_____

Check One:

☐ **Base Incentive:** Monitoring software/equipment installation date (mm/dd/yyyy) _____

☐ **Performance Incentive:** Attach supporting documentation

Print Name: _____ **Title:** _____

Signature: _____ **Date: (mm/dd/yyyy)** _____

Please note the application must be signed & dated by the customer or authorized 3rd party. Certified digital signatures are accepted. (If digital signature is not supported in your PDF software, please open this application in Adobe Acrobat Reader.)