Application Guide

Instructions and Guidelines for Participation in the Ameren Illinois Energy Efficiency Program for Business

Applications

Application forms contain all the information you need to participate in the program. Common applications include the following. All applications, including pilot offerings and special incentives are posted in the Business Forms Library at https://amerenillinoissavings.com/business-forms-library

Specialty Equipment
- *Agriculture Equipment*
- *Industrial Facilities Equipment*
- *Refrigeration Equipment*
- *Data Centers*
- *Hospitality Equipment*
- *Water Saving Devices*
- *Steam Trap Repair/Replacement*
- *Monitored Steam Traps*
- *Variable Frequency Drives (VFD)*

New Construction
- *New Construction*
- *Design Team*

HVAC/Water Heaters
- *HVAC/Water Heaters*
- *Ground-Source Heat Pumps*
- *Weatherization*

Custom
- *Custom Projects*
- *Feasibility Studies*
- *Metering and Monitoring*

Retro Commissioning (RCx)
- *RCx Large Facilities*
- *RCx Lite*
- *RCx Industrial Refrigeration*
- *Monitoring-Based RCx*

Lighting
- *Standard Lighting (pdf)*
- *Standard Lighting (online)*
- *Streetlighting*

Instant Incentives Installation
- *Public Instant Incentives Installation*
- *Non-Profit Instant Incentives Installation*

Most applications are divided into **six sections**:

- **General Information** – program goals, applicant and project eligibility, limitations and incentive caps
- **Customer and Project Information** – customer contact information and account numbers, program ally (if applicable) and basic facility information
- **Incentive Calculation** – list of specific incentives, incentive rates and eligibility requirements. After filling this section, you should have an estimate of the proposed incentive amount for your project.
- **Terms and Conditions** – legal definitions and terms of agreement
- **Customer Acknowledgment** – documentation checklist and customer signature
- **Incentive Payment Request Form** – submitted after project completion

Additional Forms

In some situations, the following forms may also be needed:

- *Payment Release Authorization* – submitted when the Ameren Illinois customer wishes to assign payment of the incentive to a third party, such as a contractor or vendor
- *Landlord Consent* – documents the facility owner's approval of an energy efficiency project undertaken by a tenant
- *Large Incentive Request Form (LIRF)* – required for all applications requesting more than $50,000 in incentives

Preapproval vs. Final Approval

Projects **requiring preapproval** should not begin work, or make any financial commitments (including issuing PO's) until the project is preapproved. Doing so may render the project ineligible for incentives. Once preapproved, and after work is complete, documentation should be submitted for final approval.

Projects **not requiring preapproval** may purchase and install equipment before submitting their application, which is then reviewed for final approval.

The same application is used for both preapproval and final approval. It is not necessary to fill it out twice.

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Preapproval *is* required:

- when requested incentives are greater than $15,000,
- for all Custom, RCx, Metering and Monitoring, Feasibility Study, New Construction, and Strategic Energy Management projects, regardless of incentive amount,
- for pilot and special offerings, when stated on the application form.

Preapproval *is not* required:

- for Standard incentives less than $15,000 which are not one of the project types listed above.

Participation Overview

Steps for Preapproval Participation

(Preapproval Required)

- Submit application and supporting documentation for preapproval
- Program staff will conduct a pre-installation technical review. This may take as few as five business days for most Standard applications, or last two or more weeks for Custom, RCx and other applications, depending on complexity and applicant responsiveness to follow up questions and documentation requests.
- In some cases, a preapproval site inspection is required to verify baseline conditions
- **Do NOT begin work**, or make any financial commitments (including issuing PO's) until the preapproval letter is received. Doing so may void the application.
- A preapproval letter will be issued. Sign and return the preapproval letter, then follow the steps on the right for final approval participation.

Steps for Final Approval Participation

(Preapproval Complete or *not* Required)

- Purchase equipment and complete installation
- Submit application (if not already submitted) and supporting documentation, including:
  - Invoice(s)
  - Incentive Payment Request form
- Program staff will conduct a final technical review. This averages 5-10 business days for most Standard applications, but may last two or more weeks for complex projects.
- In some cases, a final site inspection is required to verify equipment operation
- An approval letter will be issued and payment will generally be received in 6-8 weeks

Quick Tips for Faster Processing

- For increased security, legacy format Microsoft Office file attachments (.doc, .xls, .ppt) cannot be accepted and may cause the email to fail. Please update any attachments to the current format (.docx, .xlsx, .pptx).
- For final applications, submit itemized invoices which include model number, description and quantity for each item. Please note where items or ordered quantities differ from those submitted on the application.
- Including manufacturer specification sheets, with relevant values highlighted for the installed/proposed equipment, will enable reviewers to quickly verify eligibility and find values for energy calculations.
- While photographs are not required, they are often beneficial, particularly if model numbers, capacities, etc. are visible.
- Watch for email or phone messages from program staff in case additional information is requested.
- Be aware that electrical equipment must either be self-installed by an employee of the Ameren Illinois customer, or installed by an Illinois Commerce Commission (ICC) certified installer to qualify for an incentive. A list of certified installers can be found at www.icc.illinois.gov/emdb/ucdb/search by choosing Authority Type, 'Energy Efficiency Installers.'
- A signed W-9 form is required in order to receive incentive payment. If the payment is to go to a party other than the Ameren Illinois customer, W-9 forms must be submitted for both parties.
- You can contact program representatives with questions prior to submitting an application to ensure that the application is properly completed. Program representatives can be reached at IllinoisBusinessEE@ameren.com or 1.866.800.0747

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Special Considerations: Custom Projects

- Custom applications may be submitted for measures which don't qualify for incentives on other applications.
- To document energy savings, calculations must be provided to predict existing energy consumption and proposed, efficient energy usage using appropriate analytical tools and clearly stated assumptions.
- Please make the review team aware of project deadlines. Custom project reviews generally require more time and communication between program technical reviewers and customer trade allies/contractors/engineers. Please allow at least 2-3 weeks for review; longer for very large or complex projects, which may require additional third-party review.

Special Considerations: Retro Commissioning (RCx)

- RCx applications use a different format than other standard applications to accommodate 5 project phases:
    - Screening phase *(large facility RCx only)*
    - Application phase
    - Survey phase
    - Implementation phase
    - Verification phase

  For each phase, you are only required to submit the information from that section's checklist.
- RCx projects must be completed by an approved Retro-commissioning Service Provider (RSP). A list of RSP's is available at www.amerenillinoissavings.com/business/incentives-services/technical-assistance-optimization-services/

Special Considerations: New Construction

- The New Construction application is in Excel format, with tabs outlining equipment incentives available for construction projects, including lighting, HVAC, water heating, custom and specialty equipment
- "New construction" includes gut remodels, projects where two or more building systems are being replaced, or where the space use type is being changed (for example, a warehouse converted to light manufacturing)
- Some fields in the workbook won't populate until 'Sector' is selected on the 'Project Info' tab, so correct incentive values can be displayed.

Frequently Asked Questions

- **Can I apply online?** *Applications for lighting upgrades may be submitted through Amplify Online Lighting. Links to training videos can be found on the login page. Applications for other incentives are not yet available online.*
- **Are electronic signatures accepted?** *In most cases, electronic signatures are acceptable for the customer acknowledgment and incentive payment request forms.*
- **I received an email that funds are reserved for my project. Does that mean it's preapproved?** *No. Funds reserved designates that a budget placeholder is set aside for your project, pending successful preapproval and final review.*
- **What happens if I order supplies before receiving preapproval?** *First, verify that your project requires preapproval (see, 'Preapproval vs. Final Approval,' above). If preapproval is required, beginning work, purchasing equipment, or issuing PO's prior to preapproval generally leads to denial of the incentive application. Contact program staff, the Energy Advisor for your territory, or the technical reviewer if you have questions regarding this requirement.*
- **What if I can't finish a preapproved project by the estimated completion date from the preapproval letter?** *As soon as you become aware that the estimated completion date will not be met, please notify the program to request an extension, and include a brief explanation of the reason behind the delay.*
- **Can I receive my incentive through electronic payment?** *At this time, all incentives are paid via check to the Ameren Illinois customer, or their designee as listed on the optional Payment Release Authorization form.*
- **What if I need my review to be completed faster?** *The program will try to accommodate requests for expedited review. Please make program staff aware of project deadlines.*
- **Are there other ways to receive incentives?** *Please visit AmerenIllinoisSavings.com to learn more about the Small Business Direct Install (SBDI) and Instant Incentives programs.*