Ameren ILLINOIS | Energy Efficiency PROGRAM

Small Business Direct Install Channel

PY2026 Program Ally Implementation Training

SBDI Operations Team:

Sara Goff, SBDI Operations Coordinator

Colin Santel, Energy Engineer Lead

Libby Stevenson, Deputy Business Program Manager

December 8, 2025

Questions & Answers

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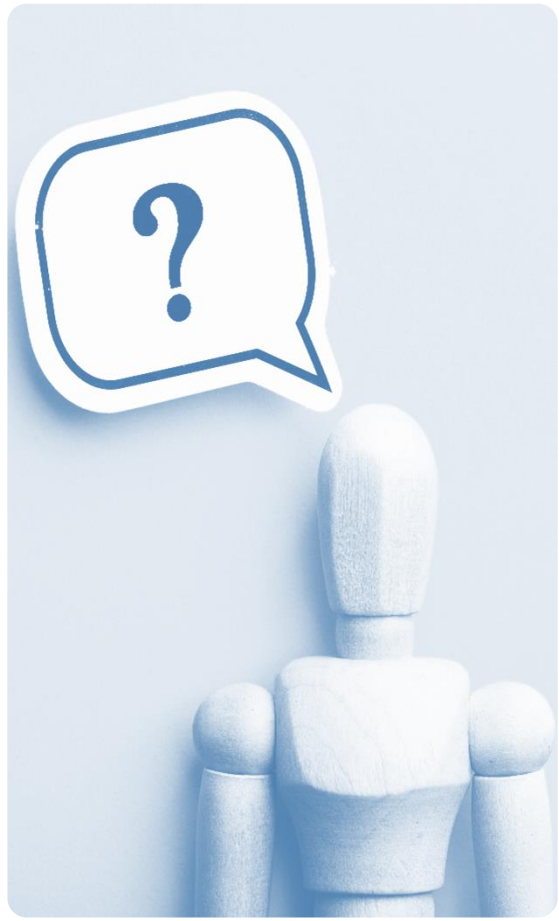
Please submit all questions in the chat.

Our Moderator will track and identify them for the SBDI Operations Team in real time.

All questions will be answered at the end of the presentation!



Small Business Direct Install

Program Ally Resources

Available to you:

1. **Program Ally Marketing Portal**

   *Professionally pre-designed marketing materials available to be shipped to YOU at **no charge**.*

   You can create your own materials and use our approved Program Ally logo.
   Requires Pre-Approval from the Program before use.

   Catapult.rgcnet.com/Portal

2. **Program Ally Resource Page**

   Links to applications and forms, helpful resources and training videos, Marketing Portal access, bonus information (as applicable), etc.

   AmerenIllinoisSavings.com/Ally

3. **Program Ally Partner Portal**

   For projects, large file uploads and payment information.

Tucker Blum

Program Ally and Midstream Marketing Manager

309.857.9773 | TBlum@ameren.com

Small Business Direct Install (SBDI) Channel Overview

- How does the SBDI Channel work?
- What is changing?
- Who can I ask for help?
- What are the guidelines?

Libby Stevenson

Deputy Business Program Manager

309-368-3475 | LStevenson@ameren.com

A Program Ally is a PARTNER, and the Ameren Illinois Energy Efficiency Program is here to HELP YOU!

We understand the challenges you face and continuously work internally to REMOVE those barriers.

- **Incentive increases:** **Enhanced incentive rates will be available for Public, Non-Profit and Disadvantaged Community participants in 2026.**
- **Process changes:**
  1. Paperwork processing (requirements)
  2. Snapshot tool modifications (user interface, defaulted fields)
  3. Enhanced Energy Advisor engagement (weekly communication, paperwork review)
  4. Toolkit and Snapshot training (plug-and-play templates, one-on-one Snapshot training)

SBDI Channel Description

- SBDI is unique in the Ameren Illinois Energy Efficiency Program because all incentives are paid to the Small Business Program Ally.
- While it might be possible, the SBDI Channel is *not* designed to provide no-cost projects.
- **Energy Assessments are *FREE* with an eligible utility account.**
- Customer must be interested in doing the project because of the incentives offered.
- Any customer that pays into the Ameren Illinois Energy Efficiency Program is eligible (unless deemed otherwise through verification).

- Unless otherwise approved, Ameren Illinois eligible customers rate codes include:
  - **Electric**: DS-2, DS3-A, Public K-12 School DS3-B
  - **NEW! Gas**: GDS-2, Public K-12 School GDS-3
- **New incentive rates for Public sector and Non-Profit Participants in 2026!**
- A copy of the utility bill can confirm rate class, account number, customer information and facility type.
- Other Retail Electric Suppliers (RES) are eligible to participate with Ameren Illinois delivery service and their 10-digit electric account number. SnapShot™ fields will automatically default to Ameren Illinois.
  - Examples: Mid-American Energy; Constellation Energy; Spark Energy, etc.

BOTH the **Small Business Program Ally** and **Small Business Energy Advisor** play critical roles in the SBDI process.

Small Business | Field Teams

Role and Responsibilities

Small Business Program Ally (SBPA)

- **Perform free Energy Assessments.**
  - Project assessments must be done on-site by a Program Ally.
- **Provide estimated sales tax on all assessments and get signed W-9 for 1099 requirement.**
- **Work with customer to identify any possible project issues prior to installation and inform customer of any additional costs.**
- **Collect applicable project paperwork and submit to Snapshot for approval and payment.**
  - Accuracy in counts and existing equipment descriptions are expected and required. Estimates of fixtures and measures are not allowed.
- **Complete projects for Ameren Illinois customers.**

Small Business Energy Advisor (SBEA)

- **Manage territory's Small Business Program Ally Network and projects.**
  - **Pending Install Reports**
    - Energy Advisor will communicate with Program Ally weekly on all pending project statuses.
  - **Manage all pipeline and completed projects, including projects with low annual usage.**
    - Energy Advisor will work with Program Ally on all projects in the pipeline and will ensure all paperwork is submitted to ensure timely payment.
  - **Energy Advisor will conduct monthly visits to Program Ally.**
- **Review all preliminary and final project paperwork.**

Small Business Direct Install

Energy Advisor Territory Guide

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Territory 1: Gretchen Primeau
(309) 512-2778 | GPrimeau@ameren.com

Territory 2: Grant LaMar
(217) 977-4503 | GLamar@ameren.com

Territory 3: Greg Ward
(262) 336-4274 | GWard@ameren.com

Territory 4: Terry Tebbe
(618) 972-0695 | TTebbe@ameren.com

Territory 5: Jason Noe
(262) 409-1232 | JNoe@ameren.com

Territory 6: Ross Gugliotta
(730) 263-8179 | RGugliotta@ameren.com

Territory 7: Rob Moss
(618) 540-9207 | RMoss4@ameren.com

Small Business Program Staff

Roles and Responsibilities

Small Business Operations Coordinator (Sara Goff)

- Process final paperwork and incentive payments to Small Business Program Allies.
- Contacts Small Business Energy Advisor with requests, inspection reports and statements to coordinate with Program Ally.
- Distributes communication on requirements to Program Allies and conducts training.
- Works with Small Business Energy Advisor on project exceptions and aids the Small Business Energy Advisors and Small Business Program Allies.
- Contact Info:
  - **Sara Goff, SBDI Operations Coordinator**
    SGoff@ameren.com | SmallBizIL@ameren.com

Small Business Energy Advisor Manager (Libby Stevenson)

- Manages Small Business Energy Advisor and Small Business Program Ally networks.
- Escalates project issues.
- Ensures completed inspections.

Libby Stevenson, Deputy Business Program Manager
LStevenson@ameren.com

Multifamily Initiative and One-Stop Shop

The SBDI Program works with the Multifamily Initiative to offer the customer a “one-stop shop” (single point of contact) for commercial and residential incentive offerings.

As an SBDI Program Ally, you *may* be contacted by the Multifamily Initiative team to request an assessment of available SBDI measures for a multifamily facility.

- **Miritza Thorpe**, Multifamily/One-Stop Shop Initiative Manager
- **Angela Stewart**, Multifamily/One-Stop Shop Program Assistant (CMC)

Please contact your Small Business Energy Advisor with any questions when requested to complete an assessment for the Multifamily Initiative.

- Please note, when partnering with Multi-Family and One Stop Shop, common areas are the only eligible areas. (Examples: hallways, exterior measures and parking lot lighting that are eligible under SBDI.)

SBDI Assessment Guidelines

Small Business Program Ally (SBPA)	Small Business Energy Advisor (SBEA)

• Submit all paperwork for pre-approval and payment.
• Change status as appropriate and notify completion to the Small Business Energy Advisor.
• Projects must complete within 90 days of pre-approval.
  ◦ Estimated Completion Reminder (ECD) emails will be generated during a project's life cycle.
  ◦ Project ECDs may be extended through communication with your Small Business Energy Advisor and the SBDI Operations Team at SmallBizIL@ameren.com.
  ◦ If ECDs are not met, incentive requests may be denied.
• Enroll eligible customers in the SBDI Program.
	• Shadow first three assessments of new Program Ally.
	• Verify all paperwork for pre-approval and payment.
	• Opportunities for ride-alongs as needed/requested.
	• Weekly/daily communication with Sara Goff to ensure questions are being answered.
	• Monthly meetings with all Program Allies.
	• Conduct inspections once project completed.
	• Review final completion paperwork for payment processing.

Energy Advisors and Program Allies are working together to reach the same goals. Open lines of communication are a necessity for success!

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PY2026 Incentives

- What's Changing?
- PY2026 Incentive Rates
- Measure Eligibility

Colin Santel

Energy Engineer Lead

309-368-3475 | CSantel@ameren.com

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PY2026 Lighting Incentive Rates

- Public sector, non-profit, and disadvantaged communities will automatically qualify for enhanced incentives.
- LED Exterior Dark Sky Fixtures Addition
- Please refer to the SBDI Measure List (PDF) for Program incentives for each measure, found in the ***Reference Library*** in Snapshot.

Ameren Illinois PY26 SBDI Measure List				
	Measure Name	Standard	Enhanced (Public + Non-Profit + Disadvantaged Communities)	Incentive per
1	LED Highbay Fixture Replacing HID	$ 1.00	$ 1.10	Watt Reduced
2	LED Fixture Replacing T12 U-bend Lamps and Ballasts	$ 0.50	$ 0.55	Watt Reduced
3	LED Fixture Replacing T8 U-bend Lamps and Ballasts	$ 1.00	$ 1.10	Watt Reduced
4	LED Fixture replacing existing T12 4' lamps and ballasts	$ 0.50	$ 0.55	Watt Reduced
5	LED Fixture replacing existing T12 8' lamps and ballasts	$ 0.50	$ 0.55	Watt Reduced
6	LED Fixture replacing existing T8 4' lamps and ballasts	$ 1.00	$ 1.10	Watt Reduced
7	LED Fixture replacing existing T8 8' lamps and ballasts	$ 1.00	$ 1.10	Watt Reduced
8	LED Exterior fixture replacing HID	$ 1.00	$ 1.10	Watt Reduced
9	LED Exterior fixture replacing HID - Dark Sky Eligible	$ 1.10	$ 1.20	Watt Reduced
10	Linear T5 LED tube 2'	$ 7.00	$ 7.75	Unit
11	Linear T8 LED tube 2'	$ 7.00	$ 7.75	Unit
12	Linear T8 LED tube 2' replacing T12	$ 7.00	$ 7.75	Unit
13	Linear T5 HO LED tube 4'	$ 14.00	$ 15.25	Unit
14	Linear T5 LED tube 4'	$ 11.00	$ 12.00	Unit
15	Linear T8 LED tube 4'	$ 12.00	$ 13.25	Unit
16	Linear T8 LED tube 4' replacing T12	$ 11.00	$ 12.00	Unit
17	Linear T8 LED tube 8'	$ 16.00	$ 17.50	Unit
18	Linear T8 LED tube 8' replacing T12	$ 16.00	$ 17.50	Unit
19	Permanent Lamp Removal: T12 Removal	$ 0.30	$ 0.35	Watt Reduced
20	Permanent Lamp Removal: T8 Removal	$ 0.35	$ 0.40	Watt Reduced
21	Permanent Lamp Removal: T5 Removal	$ 0.35	$ 0.40	Watt Reduced
22	Fixture mounted occupancy sensor for interior LED systems	$ 0.35	$ 0.40	Watt Controlled
23	Fixture mounted occupancy + daylight sensor for interior LED	$ 0.40	$ 0.45	Watt Controlled
24	Remote mounted interior occupancy sensors	$ 0.35	$ 0.40	Watt Controlled
25	Remote mounted interior occupancy + daylight sensors	$ 0.40	$ 0.45	Watt Controlled
26	Wall switch plate mounted occupancy sensors	$ 0.35	$ 0.40	Watt Controlled
27	Networked Lighting Controls - Without LLLC	$ 0.60	$ 0.65	Watt Controlled
28	Networked Lighting Controls - With LLLC	$ 1.75	$ 2.00	Watt Controlled
29	Exterior Networked Lighting Controls - Without LLLC	$ 0.60	$ 0.65	Watt Controlled
30	Exterior Networked Lighting Controls - With LLLC	$ 1.75	$ 2.00	Watt Controlled
31	Glass Door LED Cooler Lighting replacing T8	$ 1.00	$ 1.10	Watt Reduced
32	Glass Door LED Freezer Lighting replacing T8	$ 1.00	$ 1.10	Watt Reduced
33	Glass Door LED Cooler Lighting replacing T12	$ 0.55	$ 0.60	Watt Reduced
34	Glass Door LED Freezer Lighting replacing T12	$ 0.55	$ 0.60	Watt Reduced
35	LED interior OPEN sign replacing neon sign	$ 45.00	$ 50.00	Sign
36	LED interior EXIT sign replacing incandescent sign	$ 25.00	$ 27.50	Sign

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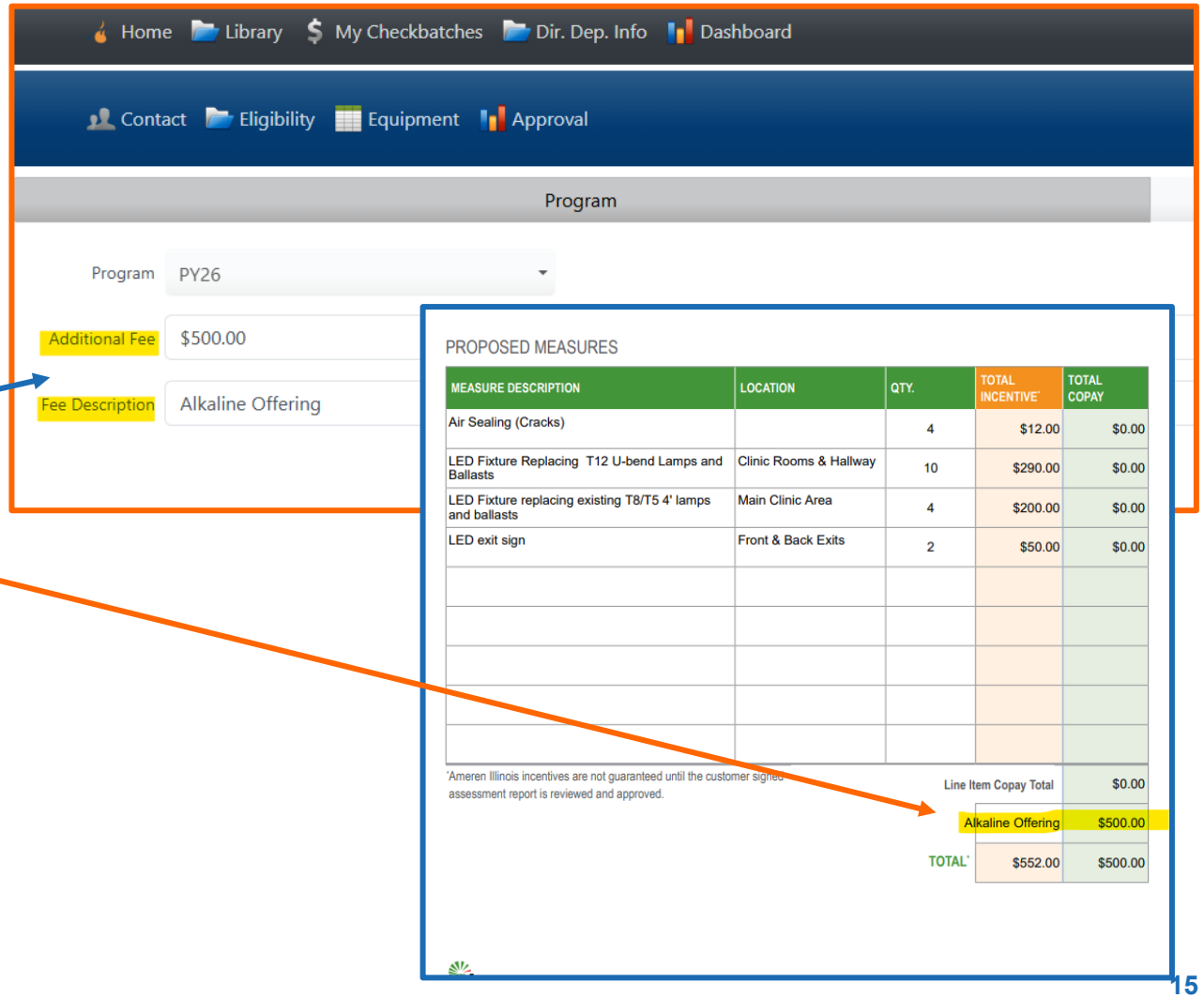
PY2026 Refrigeration, Weatherization and HVAC Incentive Rates

- *Public sector, non-profit, and disadvantaged communities will automatically qualify for enhanced incentives.*
- Please refer to the SBDI Measure List (PDF) for Program incentives for each measure, found in the ***Reference Library*** in Snapshot.

Ameren Illinois PY2026 SBDI Measure List				
	Measure Name	Standard	Enhanced (Public + Non-Profit + Disadvantaged Communities)	Incentive Per
37	EC Motors for walk-in cooler/freezer	$ 230.00	$ 250.00	Per Motor
38	Evaporator Fan Control for EC Motors	$ 270.00	$ 300.00	Per Control
39	Q-Sync motors for reach-in coolers and freezers	$ 200.00	$ 220.00	Per Motor
40	Door Heater Controls for Cooler/Freezer (Anti-Sweat)	$ 175.00	$ 190.00	Per Door Controlled
41	Cooler/ Freezer Door Closers	$ 210.00	$ 230.00	Per Door
42	Zero Energy Doors	$ 225.00	$ 250.00	Per Door
43	Smart Thermostats	$ 200.00	$ 220.00	Per Thermostat
44	Door Air Sealing - Single Door	$ 40.00	$ 45.00	Per Door
45	Door Air Sealing - Double Door	$ 80.00	$ 90.00	Per Door
46	Air Sealing - Exterior Penetration Sealing	$ 25.00	$ 27.50	Per Sealed Penetration
47	Air Sealing - Exterior Electrical Outlet Gaskets	$ 4.00	$ 4.50	Per Gasket
48	Air Sealing - Exterior Crack Sealing	$ 3.00	$ 3.25	Per Linear Foot
49	Wall Insulation	$ 0.40	$ 0.45	Per Square Foot
50	Roof/Attic Insulation	$ 0.40	$ 0.45	Per Square Foot
51	Duct Sealing	$ 6.00	$ 6.50	Per Linear Foot
52	Duct Insulation	$ 2.00	$ 2.25	Per Square Foot
53	Small Pipe Insulation	$ 0.50	$ 0.55	Per Linear Foot
54	Demand Controlled Ventilation	$ 0.25	$ 0.28	Per Square Foot
55	Advanced Power Strips	$ 20.00	$ 22.00	Per Power Strip

Program Ally Incentive Information

- Customer must be informed of any additional fees during the Energy Assessment. This may include taxes, project-specific equipment and other unique charges.
  - These fees should be included as additional line items in the Assessment Report and on the final invoice as co-pay from the Program Ally to the customer.
- Incentives are <u>not</u> intended to fully cover project costs.



SBDI Measure Eligibility
Overview

Lighting products must be selected from Qualified Product List (QPL) within Snapshot.

The DLC website (https://designlights.org) should be utilized to find currently listed products.

If a product found on DLC is not found in the QPL, please email SmallBizIl@ameren.com and include your product's spec sheet.

This is not intended for entire product offering lists.
The QPL will be updated in mass at intervals throughout the Program year.

Refrigeration, non-NLC sensors and HVAC measures will require a spec sheet uploaded to the assessment in Snapshot.

Please reach out to your Small Business Energy Advisor (SBEA) with additional questions regarding these measures.

- Material specifications are required at the time of requesting Pre-Approval to ensure all new material is eligible for incentives.

Insulation and sealing measures will require a photo of the replaced product.

Areas with no existing insulation or sealing will require photos showing the existing condition.

Details of the square footage or length must be submitted in the notes of the measure.

SBDI Measure Eligibility

Lighting and Lighting Controls

- Photos are required to document the commissioning and operation of the identified control strategies of Networked Lighting Controls (NLC/LLLC) (minimum of three).
  - Screenshots of the Lighting Control System App work well.
  - These images must show the operational control strategies. Multiple images may be necessary to clearly illustrate this functionality and should be labeled accordingly.
- Fixtures installed at a reduced (adjusted) setting must provide a photo of the installed setting.
  - Reach out to SmallBizIL@Ameren.com if you need an adjustable wattage setting added to our QPL.
  - Please include a spec sheet showing details of the different settings along with DLC Product ID.
- NLC/LLLC measures cannot be combined with a fixture using a reduced wattage.
- Photos of the wattage listed on the lamp are required for 500+ watt existing fixtures.

SBDI Measure Eligibility

Weatherization and HVAC

- For air sealing and insulation, a photo showing the existing condition is required.
- Explanations of the square footage or linear feet estimates entered must be logged in the notes for each line item.
- Minimum R-value improvement is listed in the measure eligibility section of the 2026 measure list.
- Smart Thermostats and Demand Controlled Ventilation will require spec sheets.
- **Please refer to the SBDI Measure List (PDF) for Program incentives for each measure, found in the *Reference Library* in Snapshot.**

Sealing Weatherization BEFORE

Sealing Weatherization AFTER

SBDI Measure Eligibility (Continued)

Small Business Program Ally is responsible for procuring the necessary equipment through their own supply chains.

- All lighting equipment installed must be on the Snapshot QPL derived from the active DLC versions.
- DLC versions will begin updating to a newer version in the latter half of 2026. Stay tuned for more details!
- **Evidence of unapproved materials being used on a project will result in incentive payment being withheld until the issue is resolved!**

Small Business Program Ally or Customer CANNOT purchase equipment to be used on an SBDI project that has already been discounted by another Ameren Illinois Energy Efficiency Initiative (Midstream Lighting and/or Online Store).

- Only one incentive is allowable for each energy efficiency measure. **DOUBLE DIPPING,** or installing equipment already discounted through another energy efficiency program or initiative, is against Ameren Illinois Energy Efficiency Program policies.

Beginning December 8, for 2026 projects only, project pre-approvals for incentives under $15,000 will no longer be subject to pre-approval review.

This means:

1. **If you are on-site and wish to begin a project installation with less than $15,000 in incentives, you can do so.** Note that all technical review processes will *still* occur during final review.
2. **If you elect to begin projects under this incentive threshold, you are REQUIRED to keep existing equipment that was replaced on-site** until the project status shows as pre-approved in Snapshot (weatherization is excluded from this requirement).
3. If at any time you are concerned about eligibility of equipment or other Program criteria, please reach out to your Small Business Energy Advisor so we can ensure your project qualifies before making financial commitments.
4. This does not affect any paperwork or other eligibility requirements. The same documentation at pre-approval and final approval are still required. No other processes have changed.

These changes are a result of direct feedback we have received across our Program Ally network. We value this feedback and look forward to additional opportunities to improve your experience and ultimately our Ameren Illinois customer experience.

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Frequently Asked Questions

What happens if the estimated incentive for any reason starts under the $15,000 level but changes result in the final incentive exceeding $15,000?

Answer: For any incentives that exceed $15,000, please notify the Program immediately to avoid potential incentive cap. Additional information regarding the reasoning for the incentive change may be requested as part of any exception request.

What happens if my equipment does not qualify after it is installed, and I did not wait for pre-approval?

Answer: If equipment is installed that does not qualify, it will not be eligible for incentives. For any concerns regarding eligibility, please input in the Snapshot system prior to installation to ensure qualifying equipment is used.

Why do I have to keep the existing equipment on-site until pre-approval is received?

Answer: Existing equipment is a requirement for potential pre-inspections or other review processes that are required as part of program operation. If you or the customer have any concerns about leaving equipment on-site until the application is pre-approved, please wait for pre-approval before beginning any work.

***** Weatherization is excluded from this requirement.***

Small Business Direct Install

Process Implementation

- What is needed?
- What is changing?

Sara Goff

SBDI Operations Coordinator

618-889-8608 | SGoff@ameren.com

Small Business Direct Install
Paperwork Requirements

Ameren ILLINOIS | Energy Efficiency PROGRAM

Pre-Approval Requirements:	Final Paperwork Requirements:

• **Signed and Completed Assessment**
  • Fine Print Pages (3 of them)
  1. Agreement For Site Access, Measurement Installation, and Inspections
  2. Guarantee of Work to be Performed
  3. Notice Regarding IRS Reporting
• **A copy of the Utility Bill OR all Snapshot fields populated correctly**
  • An uploaded copy of the utility bill will help prevent the potential for project rejection.
• **Before photos (per unique measure – area photo recommended but not required)**
  • Existing fixtures over 500 watts nominal require photo documentation of fixture nameplates and/or wattage stamp on lamp.
• **Spec Sheets (for eligible non-QPL measures)**
	• **Signed and Completed Work Order**
	  • Handwritten changes allowable for quantity changes ONLY.
	  • Must be initialed and signed by customer and Program Ally.
	• **Signed and Completed Customer W-9 form**
	  • **NEW!! W-9 forms are no longer required for**
	  1. **ALL Public Sector participants**
	  2. **SOME Non-Profit participants**
	• **Customer Invoice (template)**
	• **After photos (per unique measure – no area photo needed)**
	  • Existing fixtures over 500 watts nominal require photo documentation of fixture nameplates and/or wattage stamp on lamp.

Once a project is pre-approved, the work MUST be completed within 90 days.

Small Business Direct Install
The Power of One Document

WORK ORDER GENERATION (WITH UTILITY BILL)	WORK ORDER GENERATION (WITHOUT UTILITY BILL)

• **Utility Bill**
• Signed Assessment
• Photographs (per unique measure)
• Spec sheets (as applicable)
	• **Accurate Snapshot Fields**
	  • **Customer Name**
	  • **Eligible 10-Digit Account Number**
	  • **Site Address**
	  • **Rate Code(s)**
	  • **Facility Type**
	  • **Utility Provider**
	• Signed Assessment
	• Photographs (per unique measure)
	• Spec sheets (as applicable)

By submitting the utility bill, you are providing confirmation of all currently required Snapshot fields. These are still required, but if incorrect, the Program can help you!

Ameren Illinois Utility Bill

Rate Codes

- **Electric**: **DS-2; DS3-A** (**DS3-B for K-12 public schools only**)
- **NEW!** **Gas**: **GDS-2** (**GDS-3 for K-12 public schools only**)
- *Always shown on detail page of bill after "Small General Service"*

10-digit account number

- *Shown on the top left of the detail page of the bill*

Customer Name and Address

- *Must match utility bill*

Ameren Illinois Energy Efficiency Program charges

- *Charged to all Ameren electric bills to fund energy efficiency programs*

Any issues finding the account number or verifying eligibility?

Contact the Ameren Illinois Energy Efficiency Customer Service Call Center:
866-800-0747

Ameren Illinois Utility Bill
Features

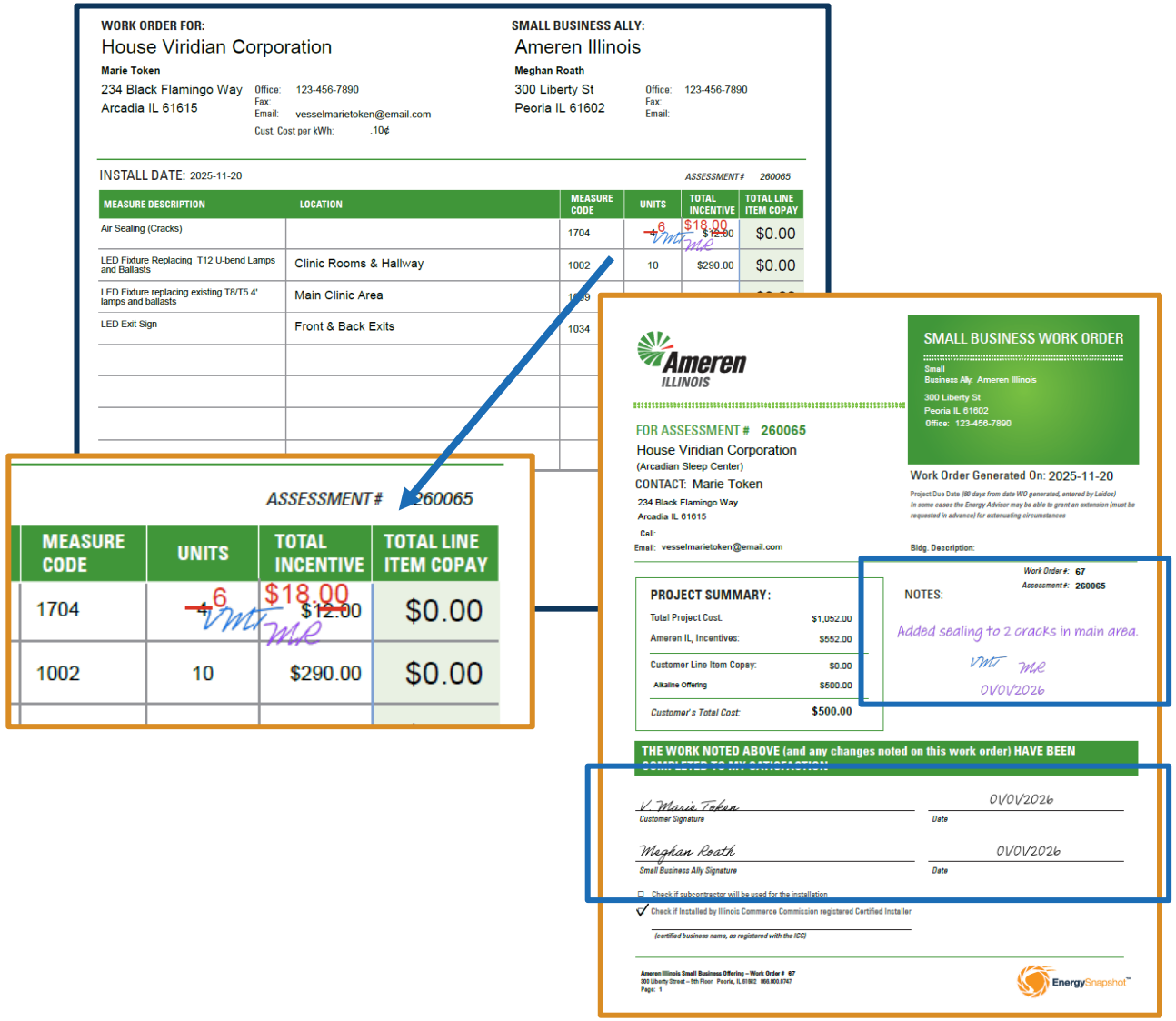
(Rate Code) →

(EE Funding) →

	CHARGE DESCRIPTION	USAGE	UNIT	RATE	CHARGE
Electric Delivery	Customer Charge				$21.70
Ameren Illinois	Meter Charge				$7.31
DS-2 Small General Delivery Service	Distribution Delivery Charge Non-Summer	2,000.00	kWh	@ $ 0.02959000	$59.18
	Distribution Delivery Charge Non-Summer	912.00	kWh	@ $ 0.01516000	$13.83
	Electric Deferred Income Tax Adjustment	$100.34		@ -2.730000%	$-2.74
	Delivery Service Cost Adjustment	$100.34		@ 9.800000%	$9.83
				Electric Delivery	**$109.11**
Electric Supply	Purchased Electric Non-Summer	2,000.00	kWh	@ $ 0.07485000	$149.70
Ameren Illinois	Purchased Electric Non-Summer	912.00	kWh	@ $ 0.07485000	$68.26
BGS-2 Basic Generation Service	Purchased Electricity Adjustment	2,912.00	kWh	@ $-0.00468500	$-13.64
	Supply Cost Adjustment	2,912.00	kWh	@ $ 0.00047437	$1.39
	Transmission Service Charge	2,912.00	kWh	@ $ 0.02281000	$66.42
				Electric Supply	**$272.13**
State and Local Taxes and Other Mandated Charges	Customer Generation Charge				$1.33
	Clean Energy Assistance Charge	2,912.00	kWh	@ $ 0.00183000	$5.33
	Coal to Solar and Energy Storage Charge*	2,912.00	kWh	@ $ 0.00002000	$0.06
	Renewable Energy Adjustment*	2,912.00	kWh	@ $ 0.00458000	$13.34
	EDT Cost Recovery	2,912.00	kWh	@ $ 0.00125310	$3.65
	Energy Efficiency Programs Charge	2,912.00	kWh	@ $ 0.00617000	$17.97
	Energy Transition Assistance Charge*	2,912.00	kWh	@ $ 0.00072000	$2.10
	Utility-Owned Solar and Storage Adjustment*	2,912.00	kWh	@ $ 0.00008400	$0.24
	Illinois State Electricity Excise Tax				$9.51
				Total Taxes and Other Charges	**$53.53**

Work Order Process

- Small Business Program Ally completes all work within 90 days of pre-approval.
- Small Business Program Ally may make *minor* adjustments to work orders in the field (i.e., incorrect quantities *only*).
  - Modified work orders require Small Business Program Ally markup and customer signature and customer initials on each change. A Small Business Energy Advisor will verify this.
  - All incentives/co-pay changes must be clearly identified to the customer and noted legibly on submitted work order and invoice.
  - A change in equipment measures will require a new work order to be generated and signed by the customer.
  - **All equipment and incentives data within Snapshot must match the work order modifications before submitting the assessment for payment.**



Work Order Process
The +/- $1000 "Rule”

Why is this a requirement?

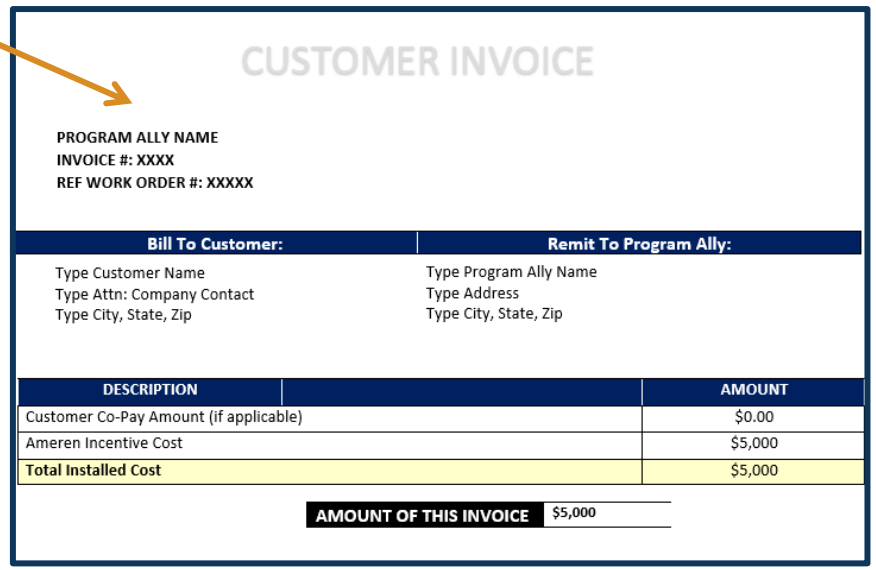
- Formerly known as the +/- $500 Rule, this rule is implemented to protect the Program, the Ally and the Participant where product prices may vary in a dynamic marketplace.
- If a project, during its lifetime, increases or decreases in requested incentives by $1,000 or more, the Program Ally must have the Participant sign a new IRS Reporting Page and submit with the final paperwork.

What Changed?

- You no longer need to have the entire assessment resigned.
- The increase/decrease value has increased with the changes we are seeing you experience in the market.

Work Order Process (Continued)

- Small Business Program Ally submits all final paperwork to Snapshot per project.
  - Signed Energy Assessment
  - Completed work order signed by *customer* and *Program Ally*
  - Program Ally invoice to customer (see our featured template for ease of invoicing)
  - Correct W-9 for 1099 requirements (*where required*)
  - All required photos with clear images per unique measure
    - Photo documentation of existing lighting greater than 500 watts nominal
- Incentive payment issued directly to Small Business Program Ally within 60 days of submittal of all final paperwork.
  - Incentive check lead time may be extended due to missing Program requirements (e.g., incorrect material used, outstanding inspection issues, ICC Certification still pending, ACH/W9 forms expired or missing, etc.).
  - All current completed projects are combined into one direct deposit (ACH) transaction per check batch.
  - Program Ally Supervisor has access to the My Check Batches Report in Snapshot which outlines the processed check batches, and the Program Ally's projects and incentives included in each.
  - Approved for Payment email notifications will be sent to the Program Ally contacts upon complete remittance of the entire batch.



CUSTOMER INVOICE

PROGRAM ALLY NAME
INVOICE #: XXXX
REF WORK ORDER #: XXXXX

Bill To Customer:	Remit To Program Ally:
Type Customer Name Type Attn: Company Contact Type City, State, Zip	Type Program Ally Name Type Address Type City, State, Zip

DESCRIPTION	AMOUNT
Customer Co-Pay Amount (if applicable)	$0.00
Ameren Incentive Cost	$5,000
Total Installed Cost	$5,000

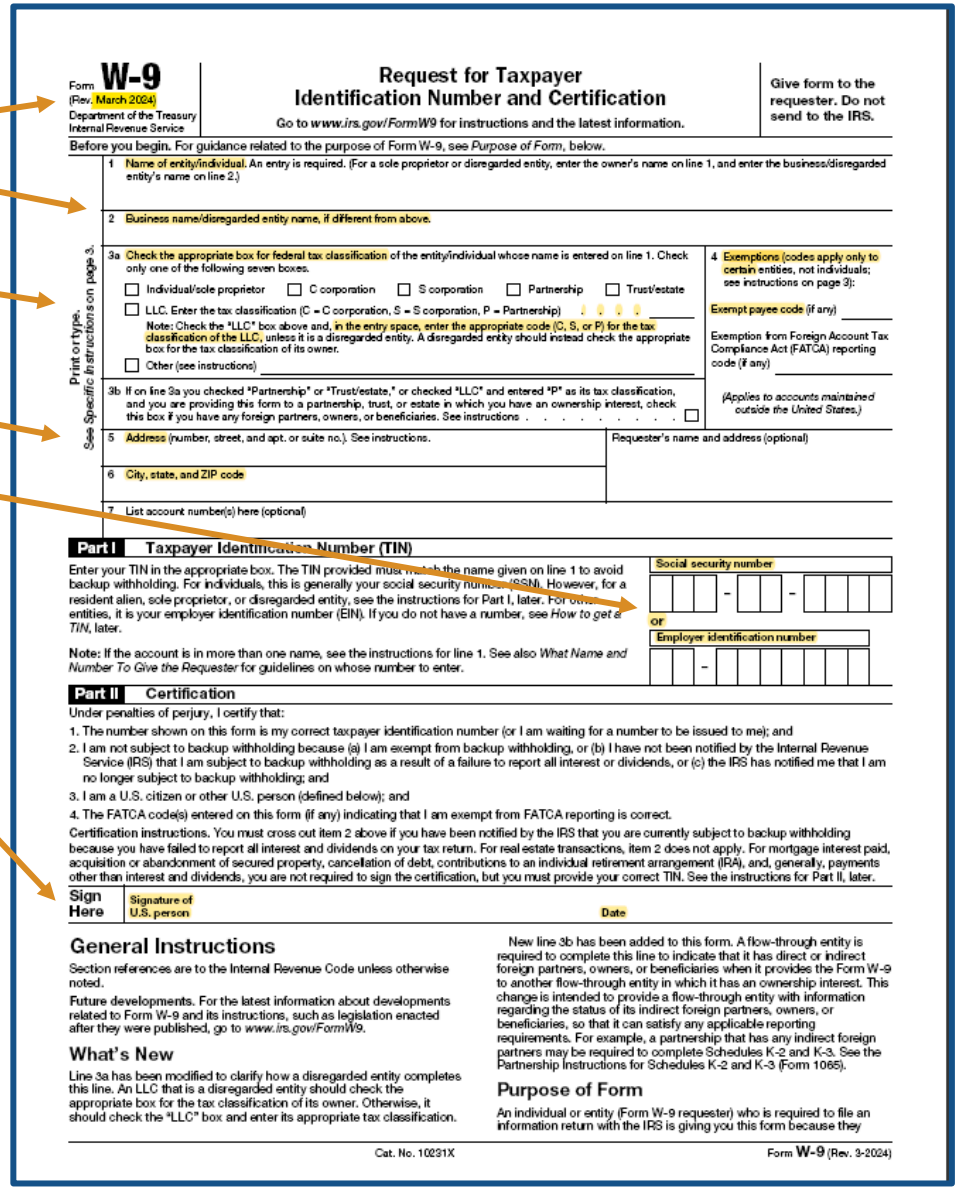
AMOUNT OF THIS INVOICE $5,000

W-9 Form (Required)

Ameren ILLINOIS | Energy Efficiency PROGRAM

- **Requirements**
  - Ideally, W-9 form version should be 2024, but will accept 2018 or later.
  - Business Name and/or DBA should match the Utility Account Holder's Name.
  - Tax Classification should be filled out completely.
  - Business Mailing Address on record with the IRS.
  - Either the Business Federal Tax ID (TIN) or the W-9 holder's Social Security Number (SSN).
  - Signature of Business representative and date of signature (within the last 7 years).
    - Ideally, signature date should also be from 2024 or newer.

- **Program Allies MUST provide a 2024 W-9 form for all direct deposit paperwork.**



Form **W-9** (Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐

5 Address (number, street, and apt. or suite no.). See instructions. | Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Print or type. See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number

or

Employer identification number

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here | Signature of U.S. person | Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

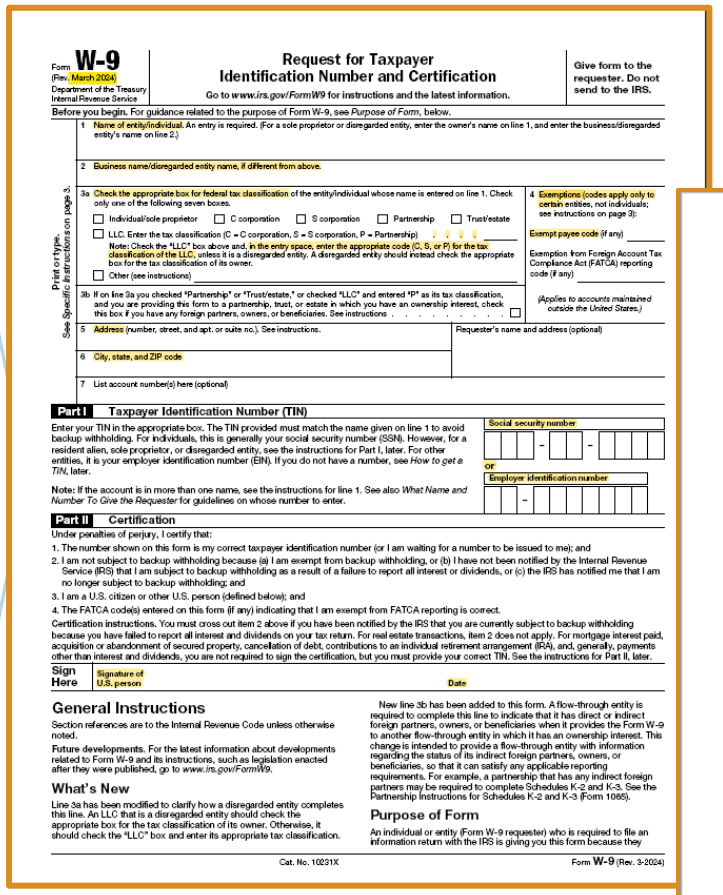
New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

Cat. No. 10231X Form **W-9** (Rev. 3-2024)

Direct Deposit Forms



Form **W-9** (Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership)

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

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5 Address (number, street, and apt. or suite no.). See instructions. Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Print or type. See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number

or

Employer identification number

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here — Signature of U.S. person — Date

General Instructions

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What's New

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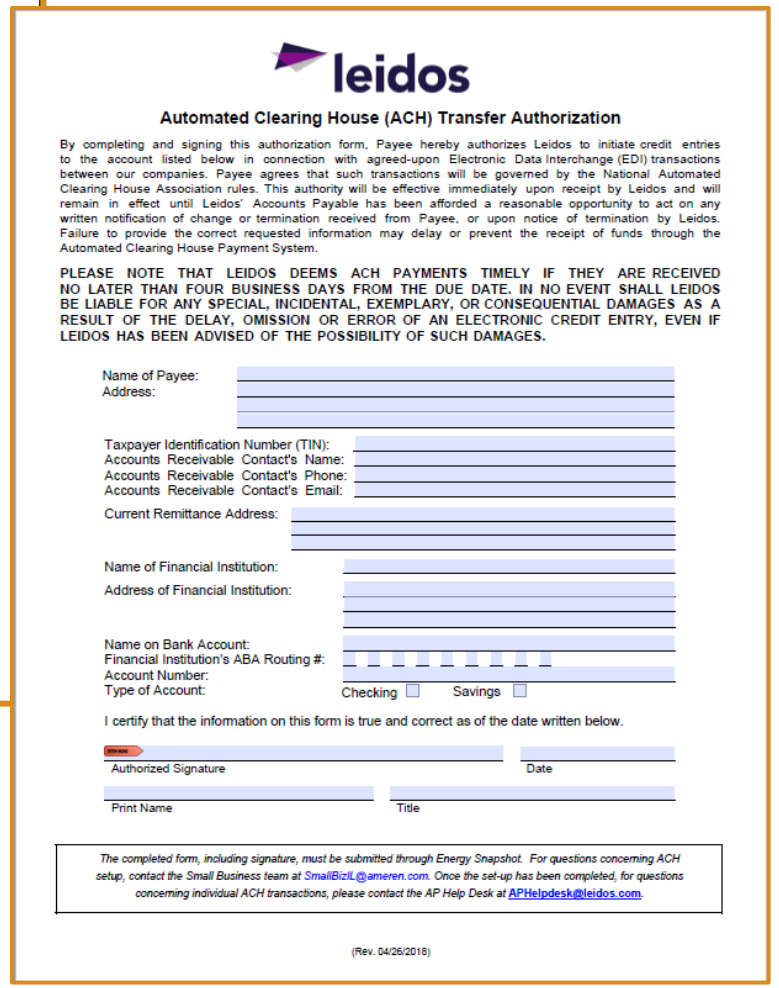
Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

Cat. No. 10231X — Form **W-9** (Rev. 3-2024)



leidos

Automated Clearing House (ACH) Transfer Authorization

By completing and signing this authorization form, Payee hereby authorizes Leidos to initiate credit entries to the account listed below in connection with agreed-upon Electronic Data Interchange (EDI) transactions between our companies. Payee agrees that such transactions will be governed by the National Automated Clearing House Association rules. This authority will be effective immediately upon receipt by Leidos and will remain in effect until Leidos' Accounts Payable has been afforded a reasonable opportunity to act on any written notification of change or termination received from Payee, or upon notice of termination by Leidos. Failure to provide the correct requested information may delay or prevent the receipt of funds through the Automated Clearing House Payment System.

PLEASE NOTE THAT LEIDOS DEEMS ACH PAYMENTS TIMELY IF THEY ARE RECEIVED NO LATER THAN FOUR BUSINESS DAYS FROM THE DUE DATE. IN NO EVENT SHALL LEIDOS BE LIABLE FOR ANY SPECIAL, INCIDENTAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES AS A RESULT OF THE DELAY, OMISSION OR ERROR OF AN ELECTRONIC CREDIT ENTRY, EVEN IF LEIDOS HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Name of Payee:
Address:

Taxpayer Identification Number (TIN):
Accounts Receivable Contact's Name:
Accounts Receivable Contact's Phone:
Accounts Receivable Contact's Email:

Current Remittance Address:

Name of Financial Institution:
Address of Financial Institution:

Name on Bank Account:
Financial Institution's ABA Routing #:
Account Number:
Type of Account: Checking ☐ Savings ☐

I certify that the information on this form is true and correct as of the date written below.

Authorized Signature — Date

Print Name — Title

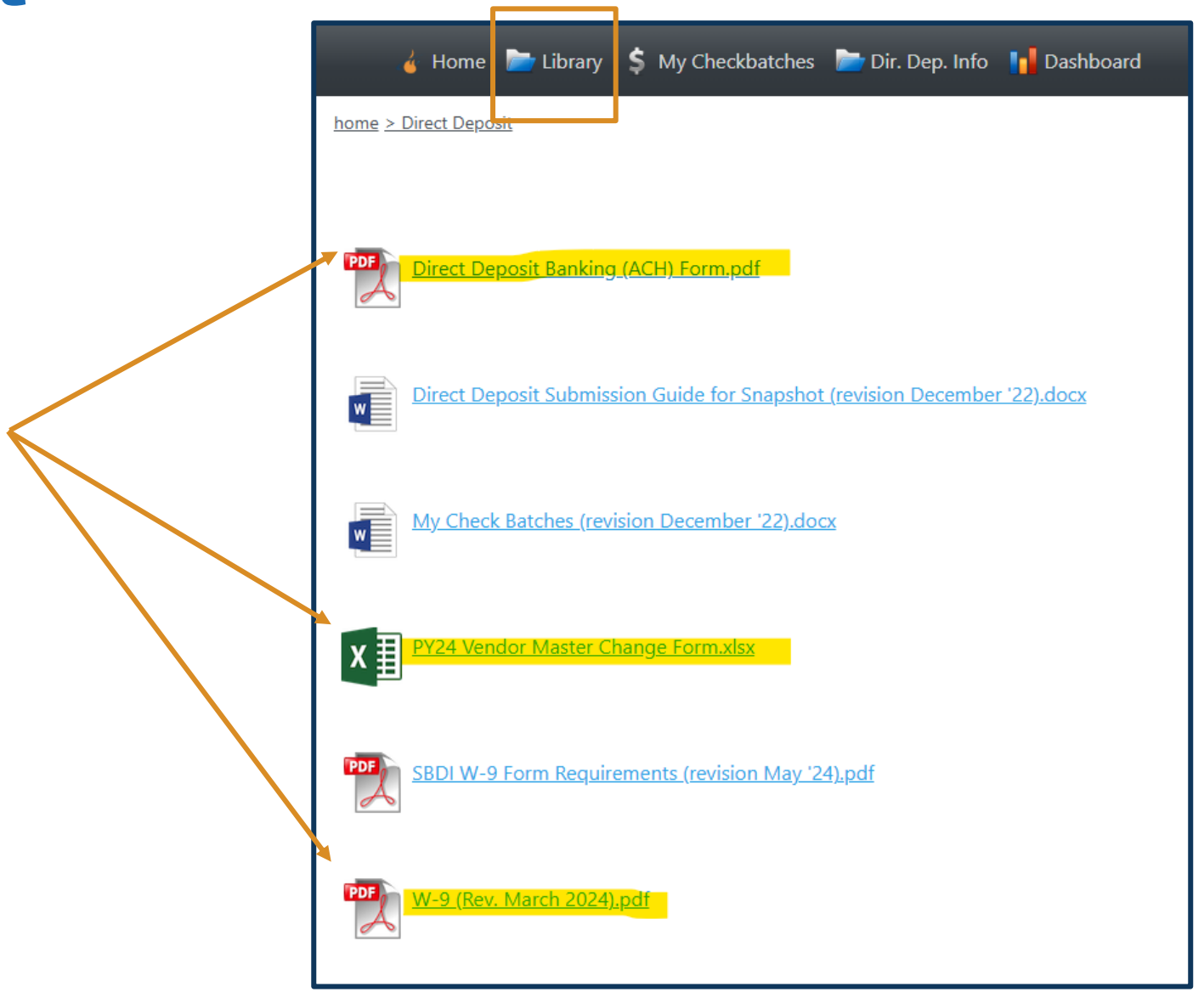
The completed form, including signature, must be submitted through Energy Snapshot. For questions concerning ACH setup, contact the Small Business team at SmallBizIL@ameren.com. Once the set-up has been completed, for questions concerning individual ACH transactions, please contact the AP Help Desk at APHelpdesk@leidos.com.

(Rev. 04/26/2018)

- **Requirements**
  1. **W-9 form** version **MUST** be 2024 for all Program Allies.
  2. **ACH Form** (Direct Deposit banking information)
  3. **Vendor Master Data Change Form**
  - These **must** include a DocuSign signature or a wet signature, including the date and timestamp on the document.
- **All forms** are located on the Snapshot Reference Library in the Direct Deposit subfolder.

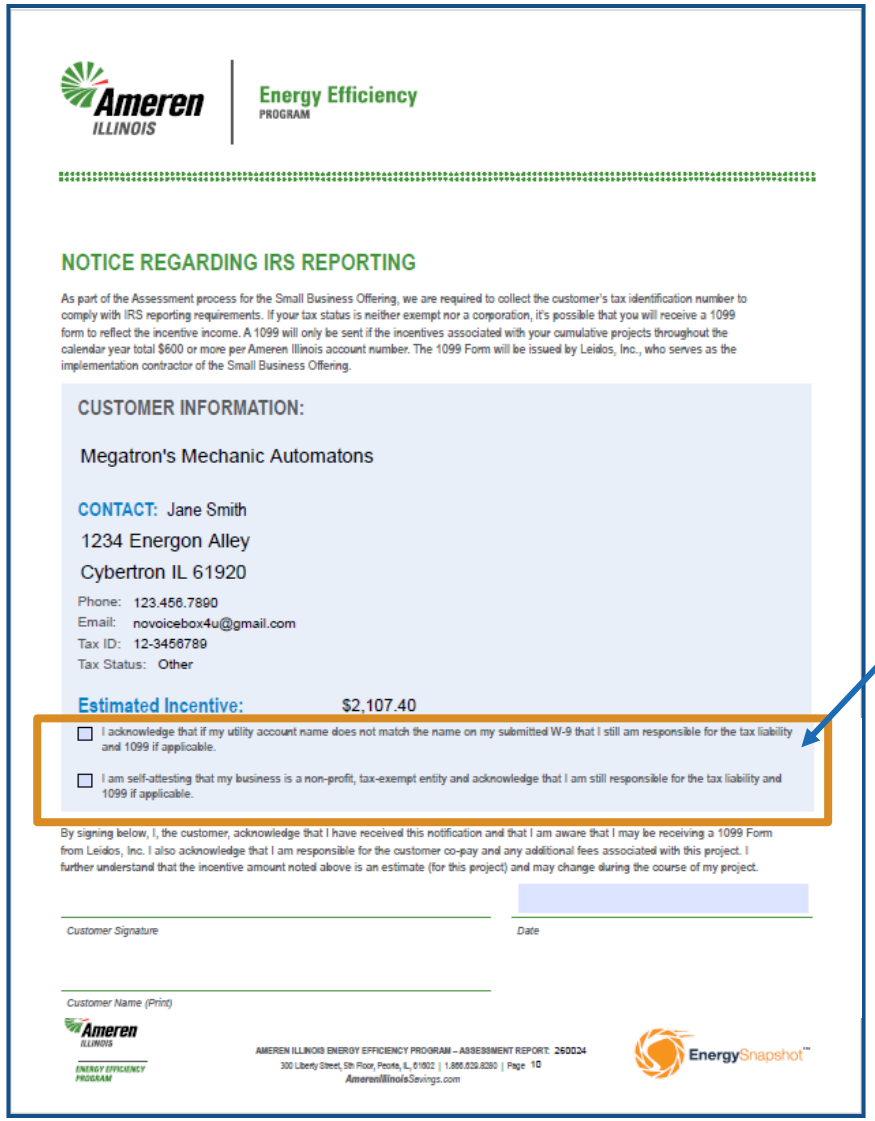
Direct Deposit Forms

- **All forms** are located on the **Snapshot Reference Library** in the Direct Deposit subfolder.



IRS Reporting Page

W9 and 1099 Forms



Ameren ILLINOIS Energy Efficiency PROGRAM

NOTICE REGARDING IRS REPORTING

As part of the Assessment process for the Small Business Offering, we are required to collect the customer's tax identification number to comply with IRS reporting requirements. If your tax status is neither exempt nor a corporation, it's possible that you will receive a 1099 form to reflect the incentive income. A 1099 will only be sent if the incentives associated with your cumulative projects throughout the calendar year total $600 or more per Ameren Illinois account number. The 1099 Form will be issued by Leidos, Inc., who serves as the implementation contractor of the Small Business Offering.

CUSTOMER INFORMATION:

Megatron's Mechanic Automatons

CONTACT: Jane Smith
1234 Energon Alley
Cybertron IL 61920

Phone: 123.456.7890
Email: novoicebox4u@gmail.com
Tax ID: 12-3456789
Tax Status: Other

Estimated Incentive: $2,107.40

☐ I acknowledge that if my utility account name does not match the name on my submitted W-9 that I still am responsible for the tax liability and 1099 if applicable.

☐ I am self-attesting that my business is a non-profit, tax-exempt entity and acknowledge that I am still responsible for the tax liability and 1099 if applicable.

By signing below, I, the customer, acknowledge that I have received this notification and that I am aware that I may be receiving a 1099 Form from Leidos, Inc. I also acknowledge that I am responsible for the customer co-pay and any additional fees associated with this project. I further understand that the incentive amount noted above is an estimate (for this project) and may change during the course of my project.

Customer Signature *Date*

Customer Name (Print)

Ameren ILLINOIS ENERGY EFFICIENCY PROGRAM

AMEREN ILLINOIS ENERGY EFFICIENCY PROGRAM – ASSESSMENT REPORT: 260024
300 Liberty Street, 5th Floor, Peoria, IL, 61602 | 1.866.629.8280 | Page 10
AmerenIllinoisSavings.com

EnergySnapshot™

- When the Business Name doesn't match the utility account holder's name... that's OK!
- A checkbox has been added to the IRS Reporting Page for this purpose.
  - The customer can simply check this box to acknowledge the situation and accept responsibility for the savings and potential 1099 at the end of the year.
  - **NEW!** An additional checkbox will appear for Non-Profit Participants to check, self-attesting their exempt tax classification and negating the need for a W-9 Form.

Post-Installation Inspections

- Conducted by Small Business Energy Advisors and other Ameren Illinois Energy Efficiency Program Staff.
- Small Business Program Ally shall make reasonable repairs or corrections to work performed, if necessary.
- Corrections shall bring work up to Program standards.
- Small Business Program Ally agrees to remedy any defects of a non-emergency nature within 10 days of notification.
- Small Business Program Ally agrees to remedy any defects of an emergency nature immediately upon notice by the customer or Program staff.

Small Business Direct Install

Customer Satisfaction

- **What is needed to be successful?**

Gretchen Primeau

Small Business Energy Advisor | Territory 1

(309) 512-2778 | GPrimeau@ameren.com

The SBDI Channel must be easy, quick and cost-effective.
It's for Small Businesses!

To Be Successful... We Need You!

- Always offer to complete the free assessment to give a better estimate of how the Ameren Illinois Energy Efficiency Program can specifically help their small business.
- The goal is to obtain a customer testimonial for every project.
- Customers love to be informed. Be proactive with a full explanation of the assessment report, applicable taxes and fees, Program funding and project timeline.
- As a Program Ally, you can help small businesses understand and use Program incentives by providing a turnkey service from the vantage point of a similar, local small business.
- All customer co-pays and Program incentives are paid to the Small Business Program Ally. All money stays local.
- A positive customer experience is a critical metric for our Program's success.
- Any customer issues are always best dealt with immediately! Contact your Small Business Energy Advisor or Energy Advisor Manager to help find a quick resolution to these issues.

Small Business Direct Install
Existing Customers

Ameren ILLINOIS | Energy Efficiency PROGRAM

Create and review a list of your current customers who could benefit from the Program. Possible targets include small businesses you do business with.

Who do you…

1. Bank with? . . . invest with? . . . buy insurance from?
2. Perform routine maintenance or service calls for?
3. Don't forget veterinarians, doctors, car dealerships, restaurants, hair salons…

Provides a great opportunity for you to approach customers with additional Ameren Illinois Energy Efficiency Incentives.

Reminds customers of your services and promotes customer loyalty.

Successful installations will gain referral work and increase your customer base.

Small Business Program Ally / Ameren Illinois Energy Efficiency Program co-branded marketing materials are available for your distribution.

Small Business Direct Install

Program Tips

If you don't know or aren't sure… **ASK!**	*ALWAYS use the **six-digit project number** when referring to a project.*	Become familiar with other Ameren Illinois Energy Efficiency Program initiatives.
• Your Small Business Energy Advisor is readily available to help you on a day-to-day basis.	**<u>It is imperative that this number is included in the subject line of all project email correspondence.</u>** • Keep all new, pending and completed project paperwork in one place or file for quick reference. • Use the project number in the files' title for easy searching. • Upload to Snapshot quickly for ease of processing.	• Almost every SBDI customer will have an opportunity to utilize weatherization measures in their facilities! • Maximize your income potential at each customer project.

Small Business Direct Install

Snapshot Enhancements

- What stayed the same?
- What is **NEW**?
- What is changing?

Sara Goff

SBDI Operations Coordinator

618-889-8608 | SGoff@ameren.com

Snapshot – What stayed the same?

The Highlights

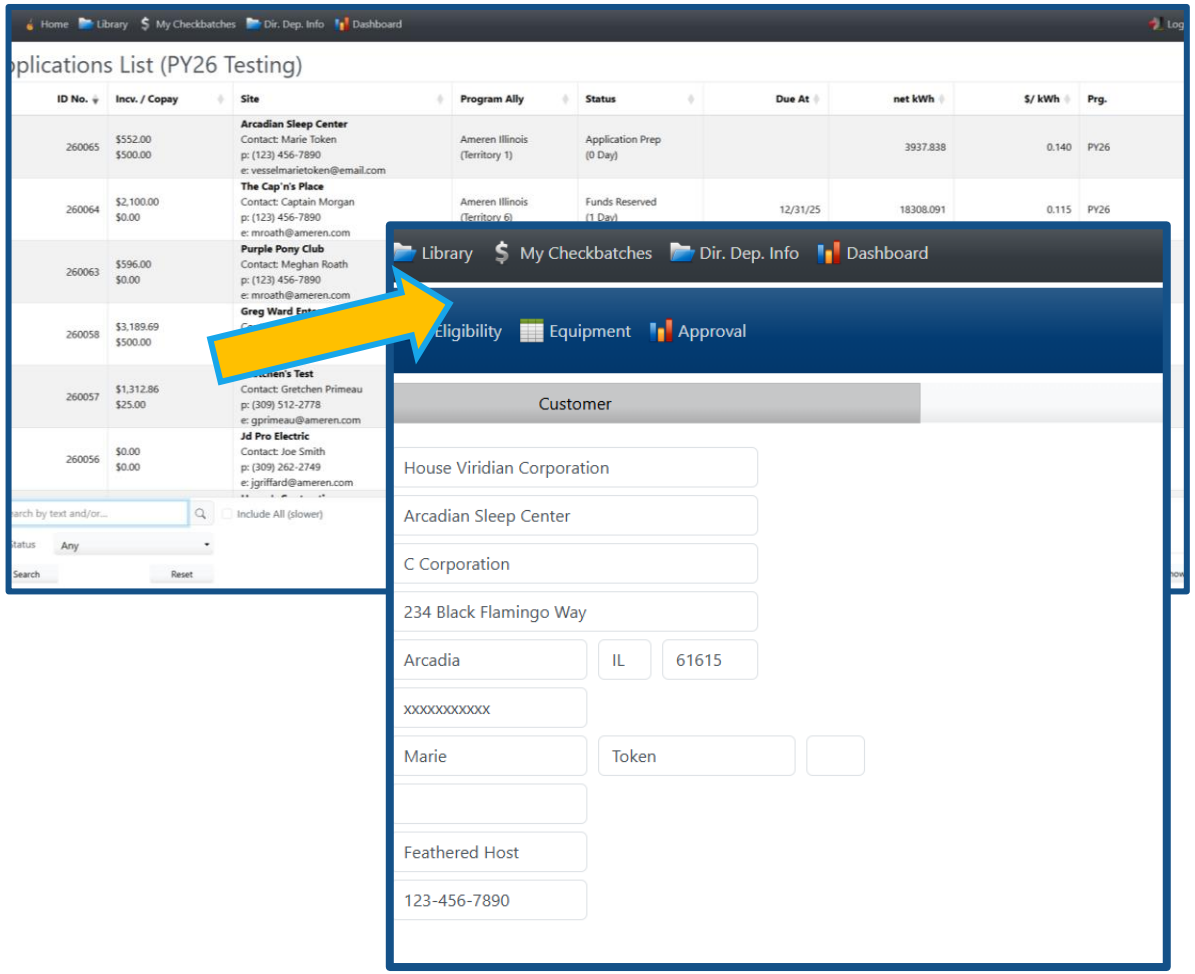
1. **The User Experience**
   - This year's layout matches last year's user experiences for ease of navigation and efficiency.
   - Enhancements to mobile and tablet-friendly navigational and viewing capabilities.
2. **Program Type Field**
   - On the Program Tab, the Program Type field auto-defaults to PY2026 – no more public or private sector selections to worry about here!
3. **Image Uploading**
   - Additional capabilities are present to remove unintended images from the upload prior to uploading.
4. **Utility Bill Folder**
   - The Utility Bill subfolder is still present for your convenience!

Snapshot Preserved
Program Ally User Experience

Ameren ILLINOIS | Energy Efficiency PROGRAM

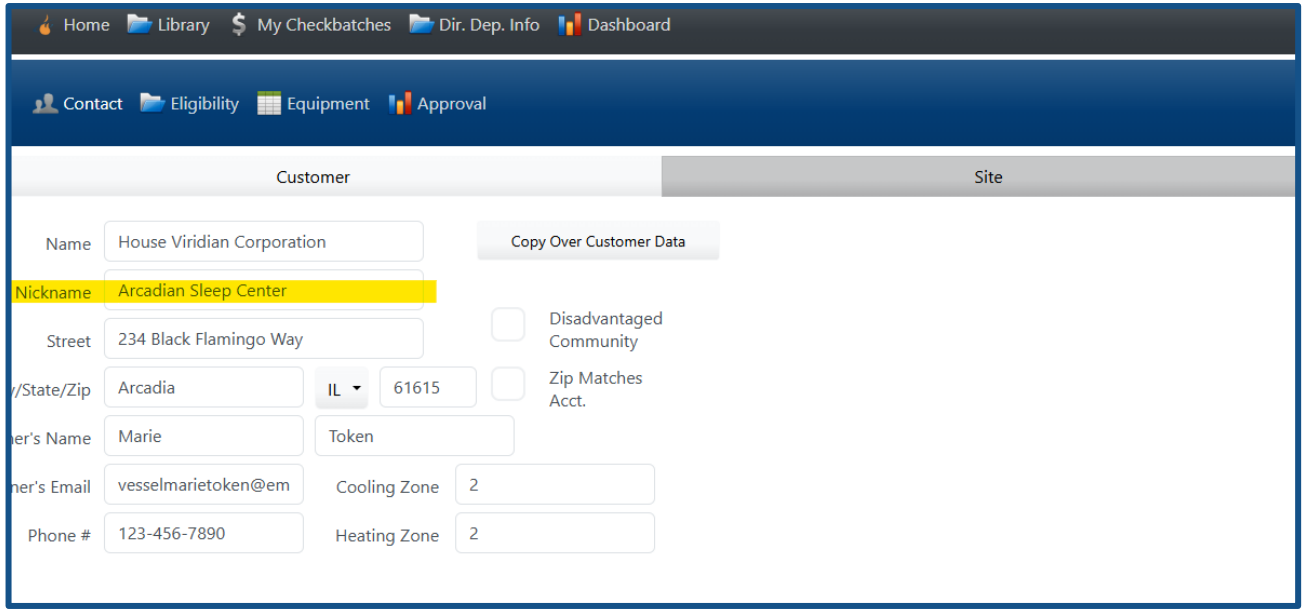
Home page after login:

- We've continued the simple design using navigational icons.
- Each icon features the same informational tabs you're used to!



Snapshot Preserved
Site Nickname

- We've added a field to the Site Tab where the Program Ally can enter the business:
  - Nickname
  - Street name
  - DBA
  - Whatever name is on their sign, door or window!
- ...whatever the name is that *doesn't* match the Utility Bill or W-9, we've got you covered!

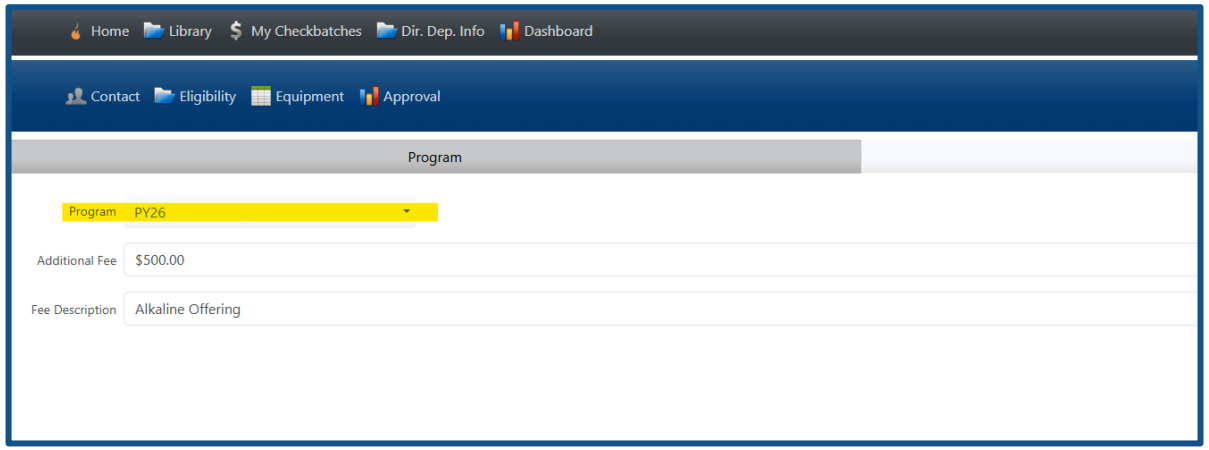


The nickname appears on **BOTH the Assessment and the Work Order for your field teams' convenience!*

Snapshot Preserved

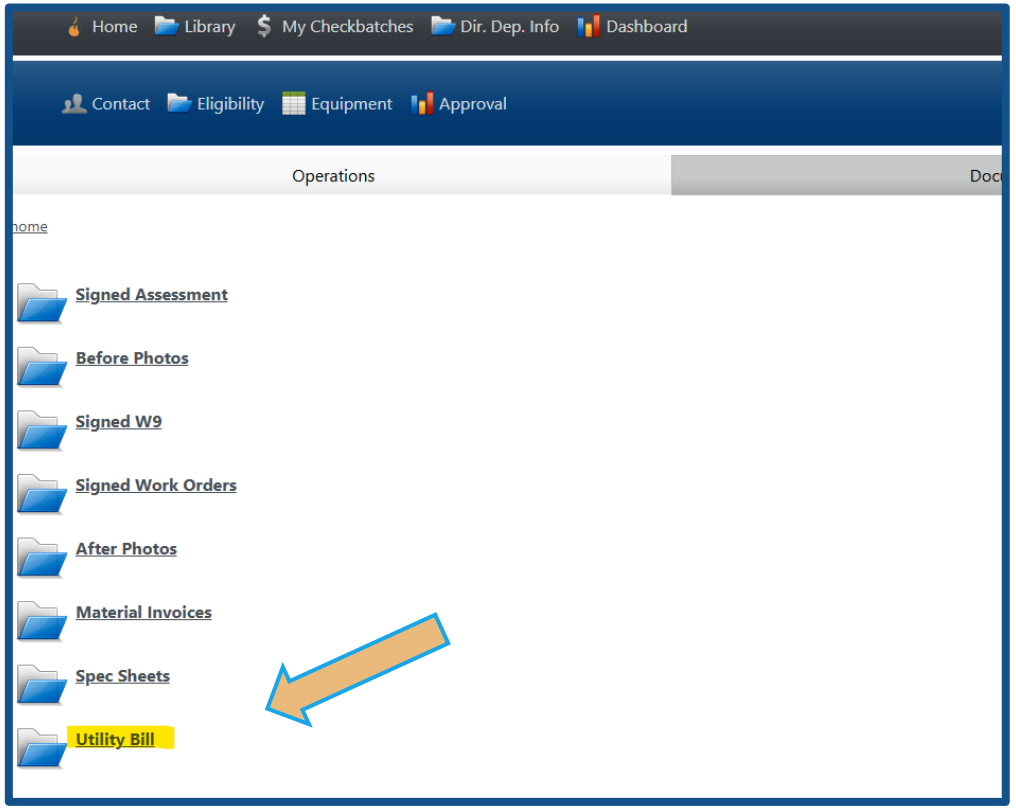
Program Type

- We've streamlined the Program Field!
- Located in Equipment on the Program Tab.
  - Last year, Small Business Program Allies had to select an option and revise the entire project if the selection didn't match the Program Type exactly (Private vs Public sector type).
  - In PY2025, we built that selection into the background based on account number, freeing Small Business Program Allies from that headache!
  - Private versus Public Sector identification will be reviewed and adjusted appropriately prior to pre-approval.
  - We've set it, so you can forget it! ☺



Snapshot Preserved
Utility Bill Folder

- While the Utility Bill is not required, it is **KEY** to ensuring projects are not rejected for minor issues.
- We've brought back a convenient place to upload that customer Utility Bill and "forget about it!"
- Just navigate to the **Eligibility Icon**, pop into that **Documents Tab**, select the **Utility Bill Folder** and upload as normal.



What Changed in Snapshot?
The Highlights

1. **Funds Reserved Process**

- All projects requesting less than $15,000 in incentives will bypass pre-approval review and go directly to Funds Reserved status instead.
- This creates a more efficient timeline for those smaller projects with DLC Qualified products to get started!
- Project Review will occur during payment review after the project has completed, and final paperwork has been submitted.

2. **Utility Provider Field**

- On the Operations Tab, we've included **both** an Electric and a Gas provider field, which will auto-default to Ameren Illinois.
  - You may also select a different provider if either the Participant's Electric or Gas utility is not Ameren Illinois.
  - ***Example**: The participant's Electric Provider is Ameren Illinois, but their Gas Provider is an out-of-network utility provider, like Nicor or a municipal gas utility.*

3. **Eligibility Section**

- On the Program Tab, there are two checkboxes featured. Select the appropriate checkboxes according to the Participant's W-9 or IRS self-attestation – but we'll check your selections, no worries!

4. **Image Uploading**

- Photo uploads will be limited to 1,000 images for smoother navigation of the Snapshot site.

5. **Equipment Measures**

- **NEW** measures with Gas incentives
- Added measure selections to ensure correlation with the new Enhanced Incentives for Public & Non-Profit sectors.

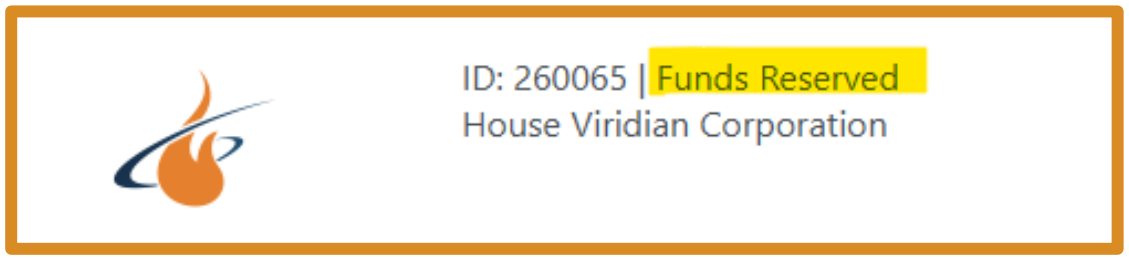
6. **W-9 Folder & Requirements**

- W-9 forms are no longer required prior to Pre-Approval Review – the project will not be rejected due to an empty W-9 folder!
- W-9 forms are no longer required for ALL Public Sector participants and SOME Non-Profit participants. Talk to your Energy Advisor today!

Snapshot Changes
Funds Reserved Process

If your project is **less than $15K** in requested incentives:

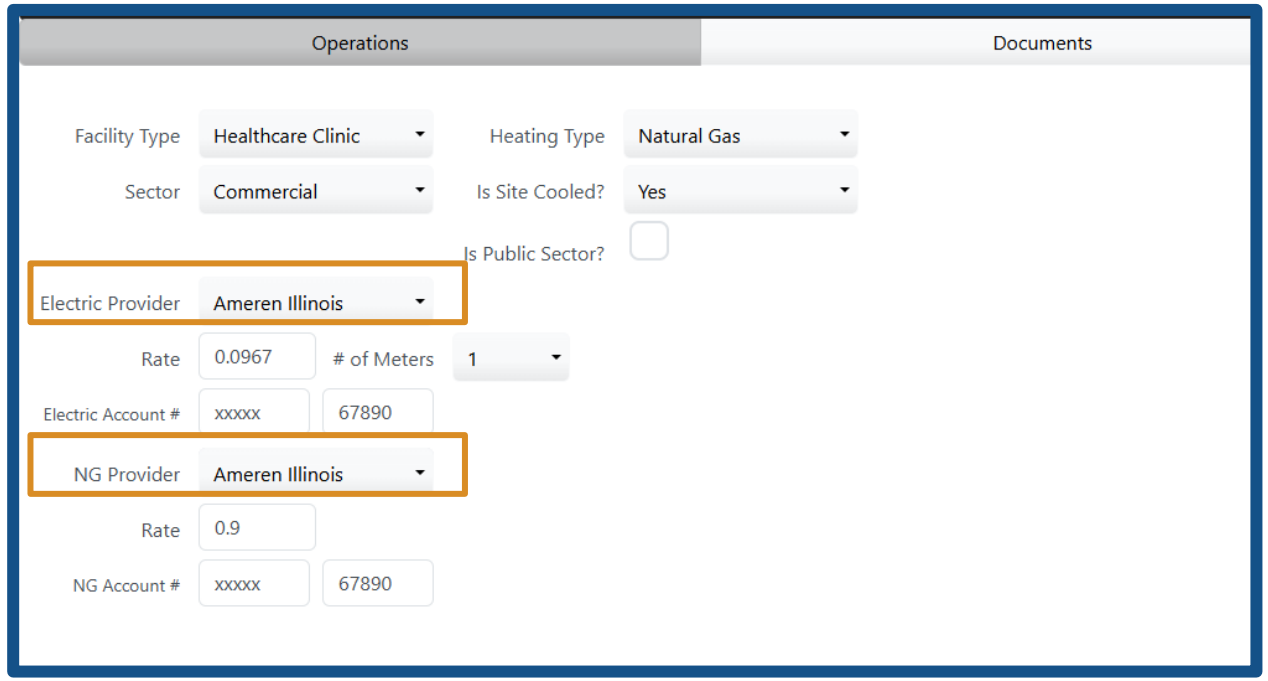
1. No pre-review will take place.
2. A quick Pre-inspection check will occur.
3. The project will be placed in **Funds Reserved** status if no pre-inspections generate for the project.
4. Once a project is in Funds Reserved status, the project may immediately begin!



- ★ *This new process, or status, is similar to Pre-Approval; however, all paperwork and measures review will occur when the project is submitted for payment, as opposed to before the project starts.*
- ★ *Projects qualifying for Funds Reserved status will typically receive that status update within 24 hours.*
- ★ *This cuts additional time for waiting to begin, as well as the payment timeframe of the project, for most projects!*

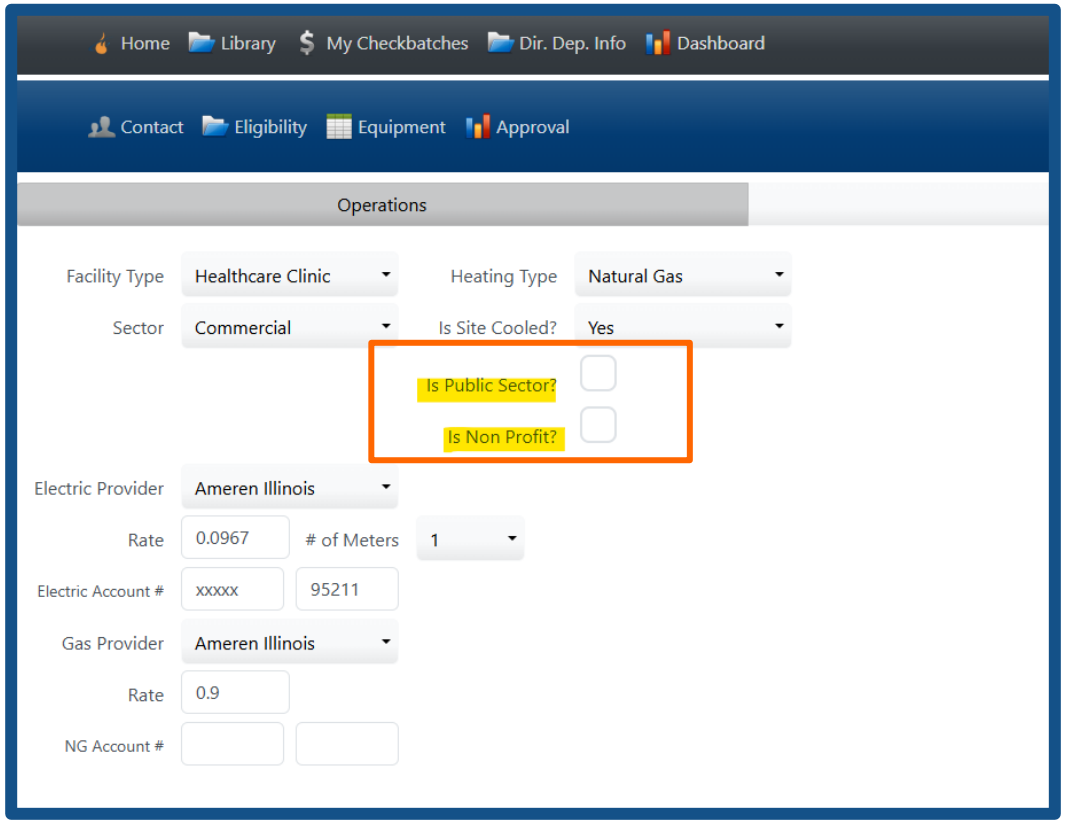
Snapshot Changes
Ameren Utility Provider Field

- The **Electric Provider** field will automatically default to Ameren Illinois.
- The **Gas Provider** will automatically default to Ameren Illinois.
- You can select a different utility provider if one or the other is not Ameren Illinois.



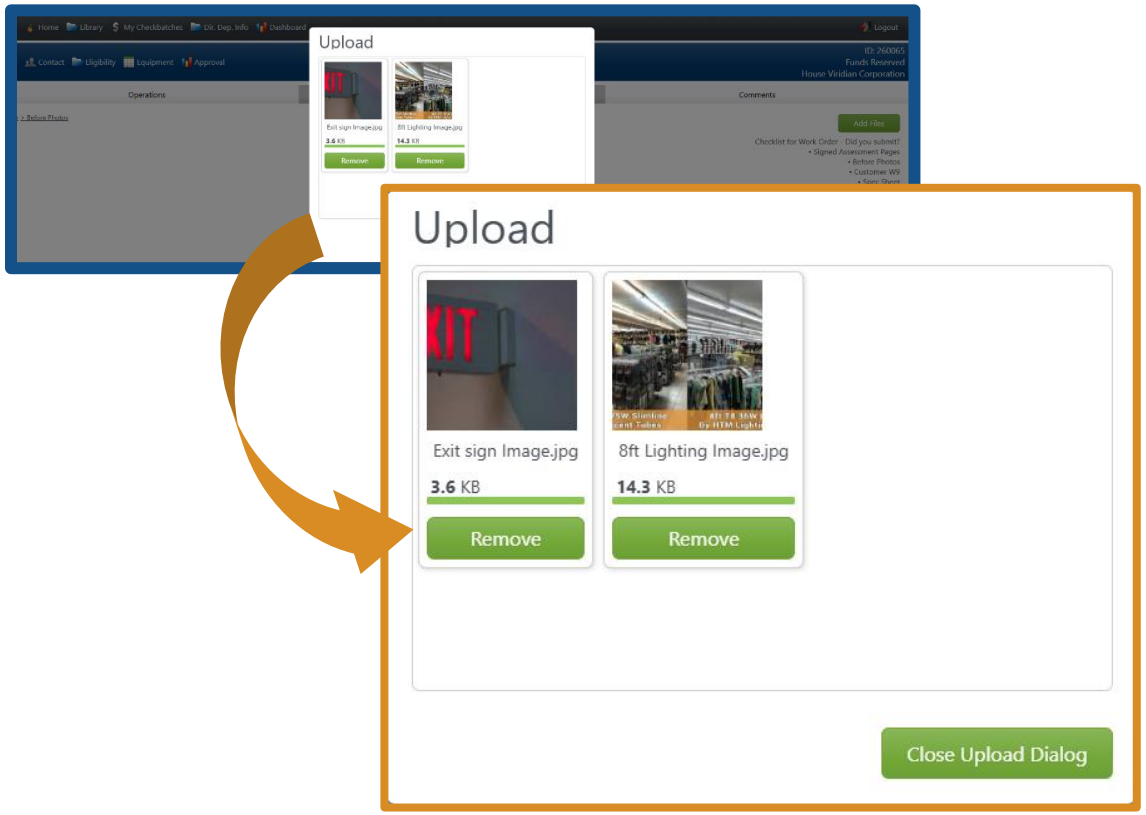
Snapshot Changes
Eligibility Section

- Based on the Participant's W9 or IRS Reporting Page, select the appropriate tax exemption checkboxes.
- Don't worry – we promise to review your selections for accuracy!
  - Is Public Sector? ☑
  - Is Non-Profit? ☑



Snapshot Changes
Image Uploading

- We've kept the ability to remove unwanted images accidentally selected for upload.
- We've added a new limit for up to 1000 images – this cap will help to prevent major lagging issues on the site experienced last year!



Snapshot Changes
Equipment Measure

- **Now available:** Measure including **Gas incentives.**
- An *enhanced* incentive rate for qualifying Public Sector, Non-Profit and Disadvantaged Community Zip Codes.
- For more information on these additions, contact your SBEA!

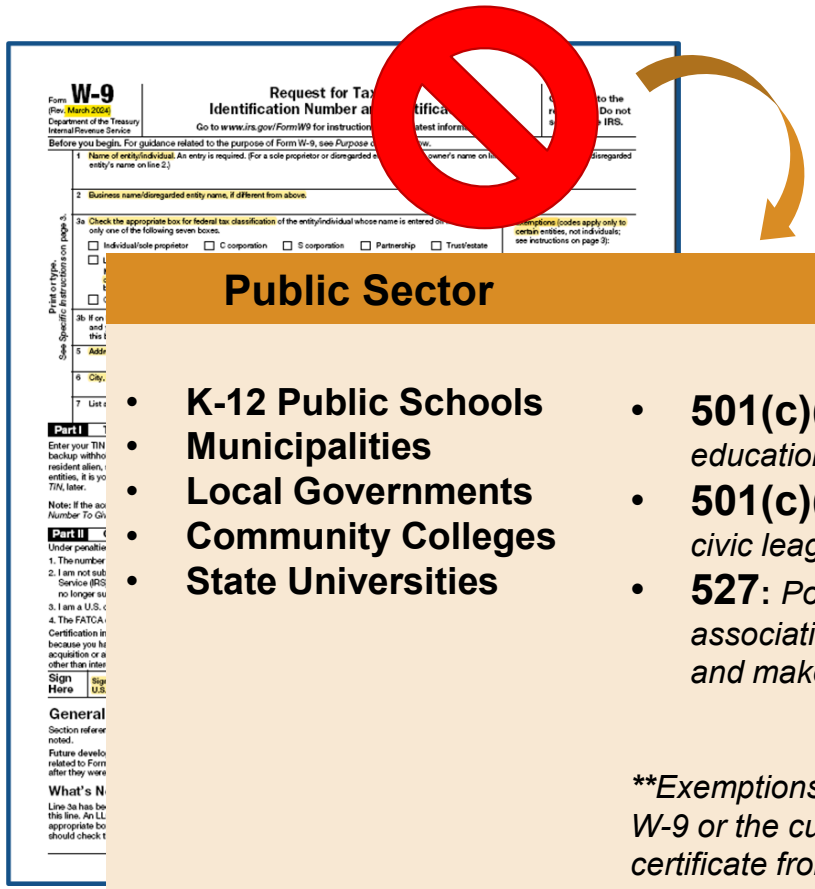
Qty	Equipment Details	Location/ Notes/ NLC
New: 001	**Name:** Air Sealing (Doors)	
New: 002	**Name:** Air Sealing (Cracks)	
New: 002	**Name:** Air Sealing (Gaskets)	
New: 001	**Name:** Duct Sealing	
New: 001	**Name:** Roof/Attic Insulation	
New: 001	**Name:** Small Pipe Insulation	
New: 001	**Name:** Duct Insulation	
New: 001	**Name:** Smart Thermostat	
New: 001	**Name:** Wall Insulation	
New: 001	**Name:** Zero Energy Doors	
New: 001	**Name:** Air Sealing (Doors)	

Snapshot Changes

W-9 Forms and Requirements

- W-9 forms are no longer required prior to Pre-Approval Review.
  - Projects will *not* be rejected due to an empty W-9 folder!
- W-9 forms are no longer required for:
  1. **ALL** Public Sector participants
  2. **SOME** Non-Profit participants

We know you'll have questions, but your SBEA can help. Contact them today!



Public Sector	Non-Profits
• **K-12 Public Schools** • **Municipalities** • **Local Governments** • **Community Colleges** • **State Universities**	• **501(c)(3)**: *Religious, charitable, scientific, educational or literary businesses.* • **501(c)(4)**: *Social welfare organizations like civic leagues or social clubs.* • **527**: *Political organizations, committees, associations or funds that accept contributions and make expenditures for political campaigns.*

***Exemptions will either be clearly marked on their W-9 or the customer may have a non-profit certificate from the IRS.*

Snapshot Server
Troubleshooting

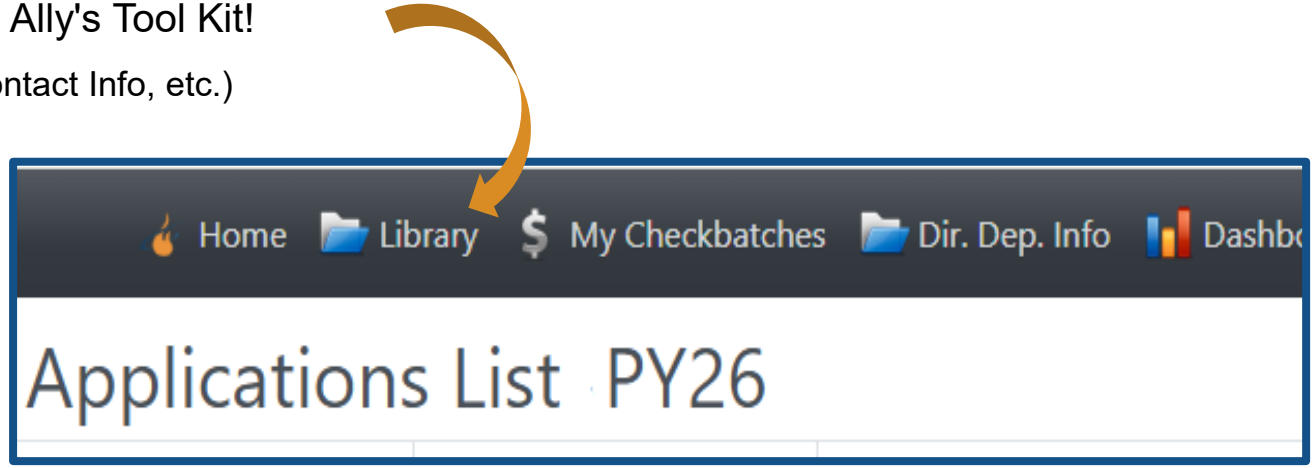
- Assessments may need to be exited and re-entered before data is refreshed.
- If you are experiencing any issues with the server site, please proceed with the following actions:
  - ✓ Contact your Small Business Energy Advisor first. They have the most experience with the tool and may be able to help solve the problem.
  - ✓ If your Small Business Energy Advisor can't find a solution: he/she will help you contact the software support team and work to expedite a solution.
  - ✓ Please have your project number, browser version, screenshots and/or a brief description of what you were doing when you experienced issues to help them diagnose and correct the problem.

Snapshot Server Updates

- Software updates will occur as needed:
  - Significant measure or calculation changes, etc.
  - Significant interface, assessment report, work order changes, etc.
  - Any software housekeeping or cleanup needed
  - General maintenance
- All users will be given advance notice (via email or pop-up message) of any **major** upcoming software updates that will disrupt service during the work week.
  - It is **VERY** important to be on the lookout for any email from Program staff pertaining to Snapshot updates.
  - **The team will strive to run these update *after* business hours and on the weekends, as much as possible, to minimize impact to your processes.**

How the Program Is Committed to Helping YOU

- Communication and training on all Program updates including Snapshot changes and requirement needs.
- For a personal 1:1 Snapshot training, contact your Small Business Energy Advisor and one will be scheduled for you.
- All ***new*** Program Allies are required to schedule a Snapshot training.
- Located in the Reference Library – the Program Ally's Tool Kit!
  - Program Ally Manual (How-To's, Tips & Tricks, Contact Info, etc.)
  - Customer invoice template
  - 2024 W-9 form template
  - ACH (Direct Deposit) forms
  - Vendor Master Change form
- Don't see what you ***need***?
  - **ASK!** We can make it happen!



Small Business Direct Install

Upcoming Important Dates

- **12/8/2025 -**
  - **2026 Snapshot Server Opens for New (uncompleted) Projects**
  - **2026 SBDI and Snapshot Server Informational Training**
- **~~12/12/2025~~ - due to budget, PY2025 is closed to new projects on 12/08 at Midnight.**
  - **2025 Snapshot Server Closes for New Projects**
- **12/31/2025**
  - **2025 Final Paperwork Due for all Projects**
- **1/1/2026**
  - **2026 Updated Direct Deposit Paperwork Due (ACH, W9, Vendor Master Change)**
  - **2026 Snapshot Server open to COMPLETED projects (2026 FPW)**

Ameren ILLINOIS | Energy Efficiency PROGRAM

Questions & Answers