

## Custom Application

### Does your facility qualify?

- Non-residential facility
- Electric projects: electric delivery service rate DS2, DS3, DS4, DS5, or DS6 and Energy Efficiency Programs Charge on Ameren Illinois electric bill. DS5 accounts should discuss with Ameren Illinois' representatives prior to starting. DS1 projects will be considered if there is no other Offering in the Residential or Business Program able to serve the DS1 customer.
- Gas projects: gas delivery service rate GDS2, GDS3, GDS4, GDS5, or GDS7 and Energy Efficiency Programs Charge on Ameren Illinois gas bill. GDS1 projects will be considered if there is no other Offering in the Residential or Business Program able to serve the GDS1 customer.

### Does your project qualify?

- Electric or gas energy efficiency measures not incentivized under the Standard, Streetlighting, or Retro-commissioning Initiatives (Lighting, HVAC, VFD, Specialty)
- Installing new, energy efficient equipment
- New equipment meets eligibility guidelines as specified in this application
- Estimated project completion date is on or by December 31, 2019 (please contact a program representative if the project is estimated to extend into the next program year)
- Incentive for electric projects (lighting and non-lighting) – \$0.12/kWh saved/year, capped at 80% of project cost
- Incentive for Public Sector (all rate codes) or DS2 customers – \$0.18/kWh saved/year, capped at 80% of project cost
- Incentive for gas projects - \$1.00/therm saved/year, capped at 80% of project cost
- Incentive for Public Sector (all rate codes) or GDS2 customers- \$2.00/therm saved/year, capped at 80% of project cost
- Public Sector for these enhanced rates include Municipalities, Local Government, Public Schools, Community Colleges, State, and Federal customers

### What you should know before beginning:

- Preapproval is **required** for ALL Custom projects. Do not purchase (including generating purchase orders) new equipment until receiving an official preapproval letter.
- Incentive requests greater than \$100,000 must submit a corporate letter of commitment with 30 days of receiving a preapproval letter and also submit an executed purchase order for project equipment within 60 days.
- Stockpiles of equipment are not allowed: all incentivized material must be installed and operational.
- Final application paperwork is due within 30 days of project completion **or by December 31, 2019, whichever comes first.**
- Electric projects are capped at \$500,000.
- Gas projects are capped at \$100,000.
- Custom incentive payments are capped at 80% of the customer's incremental cost to purchase energy efficiency measures, or the preapproved amount, whichever is less.
- Incentive calculations for **Custom HVAC projects** will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds \$0.03\*annual kWh usage on electric and \$0.30\*annual therm usage on gas incentive. A completed [supplemental calculator](#) must be submitted with the Custom application. (\$0.045\*annual kWh usage and \$0.50\*annual therm usage for Public Sector or DS-2/GDS-2, respectively).
- Please be aware that projects may only receive incentives for eligible equipment if it is (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. A full list of Certified Installers can be found at <https://www.icc.illinois.gov/utility/default.aspx?type=28>.

### Participation instructions:

- **Step One:** Submit your application for preapproval as directed within this application form. Do not purchase any material or generate purchase orders until a preapproval letter is issued. You will be notified if a pre-inspection is required.
- **Step Two:** Upon receipt of the preapproval letter, purchase and install the approved equipment. **NOTE:** if you are considering changes to the scope of work, it is **imperative** to contact a program representative to discuss how the change will impact your savings/incentive and the necessary steps required to request incentive changes.
- **Step Three:** Within 30 days of project completion (all equipment installed and operational) or by December 31, 2019 – whichever comes first – submit a completed Incentive Payment Request form and all supporting documentation requested. Applications are reviewed and approved projects paid within 60 days of approval.
- **Step Four:** Program staff may conduct a post installation verification inspection upon receiving final application paperwork.

\*Detailed, step-by-step instructions, FAQs, and other helpful information are available in the Application Guide ([AmerenIllinoisSavings.com/portals/0/business/forms/application-guide.pdf](http://AmerenIllinoisSavings.com/portals/0/business/forms/application-guide.pdf))

# Custom Application

## Customer and Project Information

*Red indicates a required field.*

Ameren Illinois Customer Information				
Customer Name on Ameren Illinois Account	Signed W-9 form is required documentation <a href="#">Click here for a blank W-9 form</a>		Ameren Illinois Electric Account Number: * Ameren Illinois Natural Gas Account Number: *  <i>*Both electric and gas account numbers are required if you are an Ameren Illinois electric and gas customer.</i>	
Mailing Address	City	State	Zip	
Contact Name	Title			
E-mail Address	Phone (XXX) XXX-XXXX	Ext.	Fax (XXX) XXX-XXXX	
Secondary Contact Name (if applicable)	Phone (XXX) XXX-XXXX		E-mail Address	
Physical Installation Address (if different than above)				
Installation Address	City	State	Zip	
Check one:    Owner                      Tenant (If tenant, please complete the Landlord Consent Form)				
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		
Project Installation Information				
<input type="checkbox"/> Self-installed by an employee of the Ameren Illinois customer listed on this application		<input type="checkbox"/> Installed by Illinois Commerce Commission-registered Certified Installer (Name, as registered with ICC: _____)		
Contractor/Program Ally Information (if applicable)				
Company Name	Contact Name	Title		
Mailing Address	City	State	Zip	
E-mail Address	Phone (XXX) XXX-XXXX	Ext.	Fax (XXX) XXX-XXXX	
Facility/Project Description				
Facility Type (check one): Office Medical Restaurant Grocery School/College Municipality Multifamily		Warehouse/Distribution Retail/Service Manufacturing/Industrial Hotel/Motel Multiple Other (please specify):		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):		Project Description (check one): Replacement of Failed Equipment Replacement of Operating Equipment(retrofit) Process Improvement New Construction – Existing Facility New Construction – New Building		

Newer versions 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.

# Custom Application

ELECTRIC PROJECT CALCULATIONS AND INFORMATION			
Make copies of this page if more than one measure is being implemented.		EXISTING OR BASELINE EQUIPMENT	NEW ENERGY EFFICIENT EQUIPMENT
A	Description of Measure <i>(e.g., compressed air, exterior lighting, VFD, or process improvement)</i>		
B	Electrical Load (total) kW = (W ÷ 1,000)		
C	Estimated Annual Hours of Operation (hours/year)		
D	Estimated kWh/year Used <i>(Row B x Row C )</i> kWh/year)		
		INSTRUCTIONS	ANSWER
E	Reduced kW (kW)	(difference between the two numbers in Row B)	
F	Reduced kWh per year (kWh per year)	(difference between the two numbers in Row D)	
G	Your Electric Rate (\$/kWh)	(money spent on electricity for a year) divided by (kWh used in a year)	\$
H	Annual Energy Cost Savings (\$)	(Row F) x (Row G)	\$
	Type of Project	(Choose one)	<input type="checkbox"/> Custom electric project <input type="checkbox"/> Custom Public Sector or DS2
I	Custom Incentive (\$)	Row F x \$0.12 (all facilities excluding Public Sector and DS2 customers) Row F x \$0.18 (Public Sector or DS2 <b>only</b> )	\$
J	Cost of Materials* <i>(please provide a quote or proposal to support this value)</i>		\$
K	Cost of Labor – External Labor Only* <i>(please provide a quote or proposal to support this value)</i>		\$
L	Project Cost	(Row J) + (Row K)	\$
M	Payback Period Before Incentive (years) <i>(must be between six months and ten years)</i>	Cost / Savings (Row L) divided by (Row H)	
N	Payback Period After Incentive (years) <i>(Incentive will be capped at six months OR ten years)</i>	(Cost-Incentive) / Savings (Row L) – (Row I) divided by (Row H)	
O	Incentive is What Percent of the Job Cost <i>(Ineligible if less than 10%, capped at 80%)</i>	(Row I) divided by (Row L) x 100	_____ %

\*For new construction projects and system expansions, as well as replacement of equipment at the end of its useful life, project cost and savings are based on the incremental cost and savings of high-efficiency equipment over standard efficiency equipment.

- Incentive calculations for **Custom HVAC projects** will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds \$0.03\*annual kWh usage on electric incentive. A completed [supplemental calculator](#) must be submitted with the Custom application
- Incentive calculations for Public Sector or DS2/GDS2 **Custom HVAC projects** will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds \$0.045\*annual kWh usage on electric incentive. A completed supplemental calculator must be submitted with the Custom application.

# Custom Application

GAS PROJECT CALCULATIONS AND INFORMATION		
<i>Make copies of this page if more than one measure is being implemented</i>	EXISTING OR BASELINE EQUIPMENT	NEW ENERGY EFFICIENT EQUIPMENT
A	Description of Measure <i>(e.g., Steam system, process heat system, heat recovery, other process improvements)</i>	
B	Natural Gas Load (total Therms per hour) Therms = (Btu ÷ 100,000)	
C	Estimated Annual Hours of Operation (Hours/Year)	
D	Estimated Annual Therms <i>(Row B x Row C )</i> Therms/Year	
<b>INSTRUCTIONS</b>		
E	Reduced Therms (Therms)	(difference between the two numbers in Row B)
F	Reduced Therms per year (Therms)	(difference between the two numbers in Row D)
G	Your Natural Gas Rate (\$/Therm)	(money spent on gas for a year) divided by (Therms used in a year)      \$
H	Annual Natural Gas Cost Savings (\$)	(Row F) x (Row G)      \$
	Type of Project	(Choose one) <input type="checkbox"/> Custom gas project <input type="checkbox"/> Custom Public Sector or GDS2
I	Incentive (Custom Gas) (\$)	Row F x \$1.00 (all facilities excluding Public Sector and GDS2 customers) Row F x \$2.00 (Public Sector or GDS2 <b>only</b> )      \$
J	Cost of Materials*	<i>(please provide a quote or proposal to support this value)</i> \$
K	Cost of Labor – External Labor Only*	<i>(please provide a quote or proposal to support this value)</i> \$
L	Project Cost	(Row J) + (Row K)      \$
M	Payback Period Before Incentive (years) <i>(must be between six months and ten years)</i>	Cost / Savings (Row L) divided by (Row H)
N	Payback Period After Incentive (years) <i>(Incentive will be capped at six months OR ten years)</i>	Cost-Incentive / Savings (Row L) – (Row I) divided by (Row H)
O	Incentive is What Percent of the Job Cost <i>(Ineligible if less than 10%, capped at 80%)</i>	(Row I) divided by (Row L) x 100  _____ %

\*\*For new construction projects and system expansions, as well as replacement of equipment at the end of its useful life, project cost and savings are based on the incremental cost and savings of high-efficiency equipment over standard efficiency equipment.

- Incentive calculations for **Custom HVAC projects** will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds \$0.30\*annual therm usage on gas incentive. A completed [supplemental calculator](#) must be submitted with the Custom application
- Incentive calculations for Public Sector or DS2/GDS2 **Custom HVAC projects** will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds \$0.50\*annual therm usage on gas incentive. A completed supplemental calculator must be submitted with the Custom application.

# Custom Application

## Terms and Conditions

**1. DEFINITIONS:** In addition to terms defined elsewhere herein, when any one of the following terms is used in these Terms and Conditions, wherein the first letter is written with a capital letter, then that term shall have the following definition. Words importing persons include corporation, and words importing only the singular include the plural and vice versa when the context requires.

- a) "Ameren Illinois" shall mean Ameren Illinois Company d/b/a Ameren Illinois.
- b) "Application" shall mean the Customer completed document used to apply for cash incentives, program Terms and Conditions, and any other appropriate application-specific documentation.
- c) "Application Guide" shall mean the downloadable file (PDF format) that includes: directions for completing the Application, Customer eligibility criteria, and any other appropriate documentation.
- d) "Customer" shall mean an Eligible Customer who has submitted an Application for incentive money using their Ameren Illinois account number. The Customer shall become a party to the agreement upon acceptance of Customer's Application by Ameren Illinois.
- e) "Custom Initiative" shall mean those projects associated with incentives that are not Standard or Streetlighting Initiatives, including but not limited to: *Custom, New Construction Lighting, and Feasibility Study*. See 1.k) below for a list of Standard Initiative Applications.
- f) "EEM" shall mean energy efficiency measures.
- g) "Eligible Customers" shall mean non-residential electric and/or gas Customers of Ameren Illinois. Each 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 applications to determine if your business is eligible for that application. The Ameren Illinois incentive payments are awarded only to Eligible Customers for equipment that is owned by them and installed in the Ameren Illinois service area at the location that corresponds with the Ameren Illinois account number listed in the Application. All Eligible Customers are ultimately responsible for compliance with these Terms and Conditions.
- 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) "Pre-approval" shall mean written notification to Customer of a maximum pre-approved incentive amount through a Pre-approval letter, which Ameren Illinois issues after review of the Customer's Application.
- k) "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: *Lighting, VFD, HVAC, Specialty Equipment, Steam Trap, and Leak Survey and Repair*); 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. Technologies that purport to save energy through reduction of voltage, demand, or power conditioning are not Qualifying EEMs. EEMs that displace electrical energy use or natural gas to another fuel (i.e., fuel switching proposals) are not Qualifying EEMs. Other than geothermal projects, renewable energy projects (solar, wind power, etc.) are also not eligible for incentives under this program. Unless explicitly pre-approved, EEMs must be new and covered by warranties. Natural Gas (gas) incentives do not include propane or butane measures.
- l) "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, Steam Trap and/or Leak Survey and Repair*. See the Ameren Illinois Energy Efficiency website for applications (AmerenIllinoisSavings.com).

### 2. OWNERSHIP OF CAPACITY AND/OR ENVIRONMENTAL CREDITS:

- a) EEMs purchased and installed in part through incentives provided by this program are the property of the Customer, subject to any limitations contained within these Terms and Conditions.
- b) Notwithstanding the above, unless otherwise requested in writing by the Customer prior to installation of the EEMs, Ameren Illinois holds sole rights to any system capacity credits and environmental credits that may be associated with EEMs for which incentives from Ameren Illinois were received, and Ameren Illinois can dispose of these credits in any manner authorized by law or regulation.
- c) In no event shall activity associated with any energy or environmental credits noted in Section 2(b) result in interference with the Customer's sole discretion to operate EEMs as approved in his/her incentive award.

### 3. PRE-APPROVAL

For all Applications, Ameren Illinois is not obligated to award any incentive payment unless Pre-approval is granted. Further, Ameren Illinois will not pay incentives for any EEMs ordered or any purchase order generated prior to the date of the Pre-approval letter, UNLESS, the requested incentive is less than \$10,000 on any Standard Initiative Application (see 1.j above). Pre-approval reserves incentive funds for a period up to the Estimated Completion Date provided in the Pre-approval letter. After the Estimated Completion Date, Ameren Illinois may revoke the Pre-approval letter and associated incentive funds. Customer is responsible for ensuring application is accurate and equipment meets eligibility requirements in order to receive the Pre-approval incentive payment.

**4. POST-INSTALLATION VERIFICATION:** Ameren Illinois is not obligated to make any incentive payment until it has performed a satisfactory post-installation verification. This provision may be waived at the sole discretion of Ameren Illinois.

### 5. INCENTIVE PAYMENT AMOUNTS:

a) Incentive caps (per program year for a facility) are defined as follows:

- i) Standard, Custom, and Retro-Commissioning applications: Electric incentives are capped at \$500,000 per project. Gas incentives are capped at \$100,000 per project.
  - ii) Incentives awarded under the Staffing Grant will be pro-rated based upon the energy savings achieved compared to the accepted savings in the staffing grant pre-approval letter, up to the pre-approved staffing grant incentive amount. See the Staffing Grant Application for further criteria.
  - iii) 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 applications for further details.
- b) Ameren Illinois reserves the right to adjust and/or negotiate the incentive amount, based upon its independent assessment of appropriate savings or cost estimates.
- c) Once an incentive Application is pre-approved, Ameren Illinois will pay no more than the pre-approved incentive amount.
- d) Ameren Illinois reserves the right to cap incentives at \$10,000 for Standard projects that did not obtain pre-approval.
- e) Incentives for Standard or New Construction applications will be capped at the project cost, which includes material cost and external labor cost (Internal labor is not considered in the project cost). Steam Trap Surveys are eligible for incentives when internal labor is used per the guidelines of the Steam Trap application.

**6. MONITORING AND EVALUATION FOLLOW-UP VISITS:** Customer grants Ameren Illinois and any of its agents, the right to make follow-up visits, inspections or surveys of the Customer's facility during the 36 months following the completion date of the project at a time convenient to the Customer. If Ameren Illinois discovers that the EEMs were not actually and properly installed or were subsequently disconnected within 36 months after installation, Ameren Illinois shall be entitled to money damages equal to the total amount of incentive payments made plus interest.

### 7. CHANGES IN/CANCELLATION OF THE PROGRAM:

- a) Ameren Illinois may change the program requirements, incentives, or these Terms & Conditions at any time without notice, including suspending acceptance of Applications, denial of Applications already received, or terminating the program.
- b) In the event of program change, Applications that have been granted Pre-approval will be processed to completion under the Terms & Conditions in effect at the time of Pre-approval by Ameren Illinois.
- c) Cash incentives under the Ameren Illinois programs are offered on a first-come, first-served basis and are subject to project and Customer eligibility, and the availability of funds.

### 8. 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 PAYING THE INCENTIVE PAYMENTS SPECIFIED IN THE APPLICATION OR PRE-APPROVAL LETTERS. AMEREN ILLINOIS, ITS PARENT, AFFILIATES AND SUBSIDIARIES, AND THEIR DIRECTORS, OFFICERS, EMPLOYEES, OR AGENTS SHALL NOT BE LIABLE TO THE CUSTOMER OR FOR ANY DAMAGES IN TORT (INCLUDING NEGLIGENCE) CAUSED BY ANY ACTIVITIES ASSOCIATED WITH THIS APPLICATION; 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. BY PARTICIPATING IN THE AMEREN ILLINOIS PROGRAM, CUSTOMER AGREES TO WAIVE ANY CLAIMS, EXCEPT AS PROVIDED IN THIS ARTICLE 8.a) ABOVE, AND FULLY RELEASES AMEREN ILLINOIS FROM ANY OTHER DAMAGES, OF ANY KIND ARISING OUT OF OR RELATED TO CUSTOMER'S APPLICATION.

b) The Customer shall defend, protect, indemnify, and hold harmless Ameren Illinois, its parent, affiliate and subsidiaries, and their representative directors, officers, employees, and agents from and against all liabilities, losses, claims, damages, judgments, penalties, costs and expenses (including, without limitation, attorney's fees and expenses) with respect to all demands, claims, suits, causes of action, and/or judgments for injuries, including death, to any person, of third parties, and for property damage incurred by or assessed against Ameren Illinois arising out of or relating to Customer's Application.

**9. NO WARRANTIES:** Ameren Illinois does not guarantee the energy savings and its parent, affiliates, employees, and agents 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, and agents do not endorse, guarantee, or warrant any particular manufacturer, contractor or product, and it provides no warranties, expressed or implied, including any implied warranty of merchantability or implied warranty of fitness for any product or services. Ameren Illinois has no obligations regarding and does not endorse or guarantee any claims, promises, work, or equipment made performed or furnished by any contractors or equipment vendors that sell or install EEMs.

**10. CUSTOMER SHALL PAY ALL TAXES:** Incentive payments received by the Customer or any Third Party Payee under this Agreement may be taxable by the federal, state, and local government. The Customer is responsible for declaring and paying all such taxes, regardless of who receives the incentive.

a) Except as expressly provided herein, if either Ameren Illinois or the Customer desires to modify these Terms and Conditions, the modification must be in writing and signed by an authorized representative of the party against which enforcement of the modification is sought.

**11. REMOVAL OF EQUIPMENT:** The 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. The Customer further agrees not to reinstall any of replaced equipment anywhere in Illinois, or transfer it to any other party for installation in Illinois.

### 12. CHOICE OF LAW AND DISPUTES.

a) THESE TERMS AND CONDITIONS, OR ANY OTHER REQUIREMENT OF THE APPLICATION GUIDE 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 PROJECT.

b) Customer agrees that any dispute arising out of or related to the workmanship or performance of an EEM or the adequacy or safety or such measure shall be resolved solely between the Customer and either the EEM contractor or equipment provider (Rev15)

# Custom Application

## Required Documentation Checklists

### Application for Pre-Approval

To submit your Custom application, complete and submit all the items in this checklist, and fill out the fields on this application form:

Check here if this Custom project was identified during a retro-commissioning study.

Complete all fields in the Customer and Project Information Section (p. 2)

Complete "Electric Project Calculations and Information" and/or "Gas Project Calculations and Information" tables" (p. 3 and/or p. 4)

Attach manufacturers' cut sheets for all energy saving equipment for which you are requesting incentives. *Please circle or highlight the information showing the equipment meets program technical requirements.*

Required Project Documentation (as specified on the Required Project Documentation table on p. 7.

Ensure the application is signed by the Ameren Illinois customer and that the individual signing the form has checked the box indicating compliance with the Terms and Conditions.

Completed Large Incentive Request Form (required with all applications over \$25,000) (attached after p. 7)

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 has been received.**

### Note: All Custom Projects

You should immediately contact a member of the Energy Efficiency team should project scope, equipment, cost structure, projected energy savings, or estimated completion date change

### Supplemental Documentation

There are several supplemental forms required for specific situations, as described below. All supplemental documentation can be found on the Ameren Illinois Energy Efficiency Programs website at [AmerenIllinoisSavings.com/forms](http://www.AmerenIllinoisSavings.com/forms).

[Landlord Consent Form](http://www.AmerenIllinoisSavings.com/portals/0/business/forms/landlord-consent-form.pdf) (<http://www.AmerenIllinoisSavings.com/portals/0/business/forms/landlord-consent-form.pdf>) is required if the Ameren Illinois customer is a tenant.

[Payment Release Authorization](http://www.AmerenIllinoisSavings.com/portals/0/business/forms/payment-release-authorization.pdf) (<http://www.AmerenIllinoisSavings.com/portals/0/business/forms/payment-release-authorization.pdf>) is required if the incentive is to be paid to a party other than the Ameren Illinois customer.

### CUSTOM PROJECTS WITH AN INCENTIVE REQUEST GREATER THAN \$100,000

Completion and submission of a letter of notice, signed by a corporate officer, that the company is proceeding with the project – due within 30 days of the project pre-approval.

Submission of documentation clearly demonstrating the project has commenced. This documentation may include, but is not limited to, purchase requisitions, purchase orders, invoices, sales contracts, etc., for equipment and/or services – due within 60 days of pre-approval letter (contact us if this is a problem).

Monthly contact (no later than the end of each calendar month) with a member of the Energy Efficiency team to discuss the project plan, scope, and timeline –until the project is complete and the final Incentive Payment Request is submitted.

## Customer Acknowledgment and Signature

I certify that all information provided is correct to the best of my knowledge, and I give the Company's permission to share my records with the Illinois Commerce Commission, or its contractors, who plan to evaluate my energy usage. Additionally, I will allow reasonable access to my property to verify the installation and performance of the Energy Efficiency Measures that are eligible for incentives under the Programs.

By checking this box and signing below, I certify that I have read, understood and agree to the Terms and Conditions listed above (p. 5). **Applications will not be accepted as "complete" unless this box is checked**

**Project Estimated Completion Date: (mm/dd/yyyy)** \_\_\_\_\_

**Estimated Lead Time for Major Equipment (weeks)** \_\_\_\_\_

**Print Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date: (mm/dd/yyyy)** \_\_\_\_\_

*Electronic signatures allowed and accepted by the Business Program.*

*Typing your name above constitutes a valid electronic signature.*

# Custom Application

## REQUIRED PROJECT DOCUMENTATION

*Ameren Illinois requires sufficient project documentation to verify the savings estimates provided in the application. The following serves as guidelines for the minimum required documentation that must accompany your pre-approval application.*

### PROJECT SUMMARY

- Include a summary of proposed measures (briefly describe why you are proceeding with this project and what will be done.)

### EQUIPMENT DOCUMENTATION

- A list of equipment and components to be installed, including manufacturers' catalog/model number.
- Manufacturers' specification sheets for all major components.

### ENERGY PERFORMANCE AND OPERATIONAL SEQUENCE REQUIREMENTS

- Provide calculations documenting the predicted energy consumption of the existing usage (or base usage) and proposed design using the appropriate analytical tools and clearly stated assumptions. Calculations may be performed by "hand" but spreadsheet or computer modeling analysis is preferred, and may be supplied in electronic format.
- All assumptions such as operating hours, existing and proposed equipment, and operational details must be presented.
- List of system requirements (pressure, flows, etc.), operating hours, and control strategies (attach separate sheets).

### OTHER REQUIREMENTS AND COMMENTS

- Provide any further documentation that helps to demonstrate the performance characteristics of the project and the project's ability to demonstrate and promote energy efficiency in the Ameren Illinois service territory.
- Please provide any measured data wherever possible.
- Combustion analysis tests required on any project that would impact boiler efficiency
- Pre and post- metering is encouraged and may be required on large energy saving projects
- Copy of bids to show how project cost was determined (outside labor and materials).

# Custom Application

## Incentive Payment Request Form

This form and required documentation should only be submitted upon project completion. Project completion is defined by the Ameren Illinois Energy Efficiency Programs as all equipment installed and operable. The documentation required for submission with a signed Incentive Payment Request Form varies based on project size and the project scenario as described below.

### Required Documentation Checklists

#### ALL PROJECTS

- Completed this form? (Signed by the Ameren Illinois customer and checked the box indicating compliance with the Terms and Conditions.)
- Changes since pre-approval? (If applicable, submit a written summary of the specific changes and the rationale for the changes.)
- Invoices submitted? (Must show the date, place of purchase, model/part numbers, quantities and unit costs of all equipment.)
- Signed W-9 submitted?
- Certified Installer used or self-installed by Ameren Illinois customer listed on this application? Please list the Certified Installer here, exactly as they are registered with the Illinois Commerce Commission (for a full list, visit <https://www.icc.illinois.gov/utility/default.aspx?type=28>).

### Customer Acknowledgment and Signature

I certify that all information provided is correct to the best of my knowledge, and I give the Company's permission to share my records with the Illinois Commerce Commission, or its contractors, who plan to evaluate my energy usage. Additionally, I will allow reasonable access to my property to verify the installation and performance of the Energy Efficiency Measures that are eligible for incentives under the Programs.

By checking this box and signing below, I certify that I have read, understood and agree to the Terms and Conditions (p. 5) listed in the Application. Further, I confirm that the upgrades have been completed at the facility location as specified in the "Customer and Project Information" Section of the Application. All equipment is installed and operational (not placed into storage). **Applications will not be accepted as "complete" unless this box is checked.**

Company Name (Ameren Illinois Customer): \_\_\_\_\_

Project Number (Pre-Approved Projects Only): \_\_\_\_\_

Project Completion Date: (mm/dd/yyyy) \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: (mm/dd/yyyy) \_\_\_\_\_

*Electronic signatures allowed and accepted by the Business Program.*

*Typing your name above constitutes a valid electronic signature.*



# Custom Application

## **INSTRUCTIONS (for electronic completion and submittal):**

After clicking Submit (above), if a new email message appears with this completed form attached, attach your supporting documentation (cut sheets, W-9 form, signature page, etc) to the email and click send. You can then save a copy of the completed form to your hard drive if you wish.

If a new email message does not appear, please save this completed form to your desktop. Then, create a new email message addressed to [IllinoisBusinessProjects@ameren.com](mailto:IllinoisBusinessProjects@ameren.com), attach the file you just saved as well as required supporting documentation (cut sheets, W-9 form, signature page, etc) to the email and click send. Do not submit "zip" files.

Individual attachments may not exceed 3 MB in size. The sum of all attachments may not exceed 10 MB, (PDF documents can generally be reduced sufficiently by selecting "Reduce File Size" under the "Document" menu in Adobe Acrobat).

Applications submitted electronically, using the "submit" button above, may receive priority in the application review process.