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## Metering & Monitoring Application

### Metering & Monitoring Program goals:

Ameren Illinois is offering financial support for enhancements to metering and monitoring of energy. The program will pay up to an initial \$5,000 (up to 25% of the costs) to install new meters or software to better visualize, manage, and reduce energy use. Metering and monitoring projects that submit regular baseline data for one year may also be eligible for a data bonus of up to \$2,000 (up to 10% of the project cost). When enough energy is saved through efficiency actions that result from use of this enhanced monitoring, an additional potential \$15,000 will be paid (up to 75% of the project costs). The incentive may potentially cover 100% of the cost of enhanced metering and monitoring. **Preapproval is required to receive this offer.**

### Does your facility/project qualify?

- Metering and monitoring software/equipment must be installed to provide data for energy savings and other factors required for a customer decision to move forward with an energy saving project.
- Metering and monitoring software/equipment must be intended to identify and implement energy efficient measures through a structured plan. Subsequent Custom, Standard and Retro-commissioning projects (excluding lighting retrofits) resulting from metering and monitoring data should be extensive energy efficiency projects, equipment optimization or process improvements, and must also meet Ameren Illinois Energy Efficiency Program cost-effectiveness and technical criteria.
- Metering and monitoring software/equipment must be installed at a business or commercial/industrial building.
- Non-residential facility
- Electric projects: electric delivery service rate DS2, DS3, DS4, DS5, or DS6 and Energy Efficiency Demand Response surcharge on Ameren Illinois bill for the service point corresponding to the electric project. DS4 and DS6 service points: please verify with Ameren Illinois that your service point is eligible (historical demand less than 10MW).
- Gas projects: gas delivery service rate GDS2, GDS3, GDS4, GDS5, or GDS7 and Rider Gas Energy Efficiency Cost Recovery surcharge on Ameren Illinois bill
- Metering & Monitoring equipment to be installed on or after June 1, 2017, and by December 31, 2017

### Incentives:

- Base incentive:** lesser of 25% of the metering and monitoring installed costs, or \$5,000. Paid once new metering and monitoring software/equipment is installed.
- Data incentive:** lesser of \$2,000 or 10% of the project cost. Paid upon submission of regular (at least quarterly) baseline data for the first year after metering and monitoring equipment is installed.
- Performance incentive:** \$0.02/kwh or \$0.20/therm saved based on annual energy savings generated by projects identified and implemented via metering and monitoring. Capped at lesser of 75% of metering and monitoring installed costs or \$15,000. Performance incentives are contingent upon approval of the budgets and structure of the Ameren Illinois Energy Efficiency Program for Program Years 10 through 12.
- Total maximum for Base, Data, and Performance incentives is \$22,000.

### What you should know before beginning:

- Preapproval is required for ALL Metering & Monitoring applications.
- Subsequent projects resulting from metering and monitoring must be submitted within two years of the Base incentive check is approved.
- Submitted projects must be completed within the current or following two program years (unless an exception is granted by Energy Efficiency staff).
- Only external labor costs and be incentivized; internal labor is not eligible for incentive money.
- Metering and monitoring Performance incentives cannot be combined with the Staffing Grant,

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Competitive Large Incentive Project, or Retro-commissioning incentives.

- Participation may be limited to the first 20 applications received during the effective dates listed.
- Single customers/companies are limited to three applications during the effective dates listed. Caps may be lifted by Program Management for each Metering & Monitoring installation that generates savings.
- Individual Program Allies are limited to three applications during the effective dates listed. Caps may be lifted by Program Management for each Metering & Monitoring installation that generates savings.
- Application paperwork can be submitted via email, fax, or hard copy. Do not submit “zip” files. You will receive a confirmation email within two business days of submitting a complete and correct application.

## 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.
- **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:** The Base metering and monitoring application incentive is paid upon installation of the metering and monitoring software/equipment. Complete rows A, B, and C of the Incentive Calculation, Table 2, for an estimated incentive amount. Submit completed Metering & Monitoring Application Incentive Payment Request within 30 days of metering equipment installation **or by December 31, 2017, whichever comes first.**
- **Step Four:** Upon satisfactory submission of regular baseline data for one year after metering and monitoring equipment installation, complete Row D of the Incentive Calculation, Table 2. Submit completed Metering & Monitoring Application Incentive Payment Request by December 31, 2018.
- **Step Five:** Within 30 days of completing subsequent projects, return a copy of the Metering & Monitoring application Incentive Payment Request Form, and the required documents indicated on that form. Complete rows E, F, and G of the Incentive Calculation, Table 2, to tally the Performance incentive amount.

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

# Metering & Monitoring Application

## Customer and Project Information

*Red indicates a required field.*

Table 1 - 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:*	
Tax ID (SSN/FEIN)		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		
Email	Phone (xxx) xxx-xxxx	Ext.	Fax (xxx) xxx-xxxx
Secondary Contact Name (if applicable)	Phone (xxx) xxx-xxxx	Email	
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	
Company Used for Metering & Monitoring Software			
Company Name	Contact Name	Contact Title	
Mailing Address	City	State	Zip Code
E-mail Address	Phone (xxx) xxx-xxxx	Fax (xxx) xxx-xxxx	
Facility/Project Description			
Facility Type (check one):		If Manufacturing/Industrial, specify type:	
Office	Warehouse/Distribution	Food Processing	
Medical	Retail/Service	Automotive/Transportation/Infrastructure	
Restaurant	Manufacturing/Industrial	Other (please specify):	
Grocery	Hotel/Motel		
School/College	Multiple		
Other (please specify below):			
		Facility Size (total interior square feet served by the account number provided above):	

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

Due to the nature of this offering and the incentive dollars committed, Ameren Illinois has established the following requirements

ALL METERING & MONITORING APPLICATIONS

- Return the signed pre-approval letter within 14 days of receipt.

# Metering & Monitoring Application

- Periodic contact (no less than quarterly) with a member of the Energy Efficiency team to discuss the project plan, scope, and timeline – until all subsequent projects are completed and the “performance” Incentive Payment Request is submitted. This contact will be initiated by Ameren Illinois Energy Efficiency Staff.

## Customer Commitment Form

You must complete the following form and submit it with your Metering & Monitoring Application to be eligible for incentive payment. Completing this form indicates that the Ameren Illinois customer is **committed to completing all satisfactory projects** that are identified by the Metering & Monitoring software/equipment plan. Incompletion of projects identified by the Metering & Monitoring software/equipment forfeits any “performance” Metering & Monitoring application incentive payment.

Please attach the structured metering plan which is the cornerstone of the incentive. This should be completed by the customer together with input from their Metering & Monitoring supplier and an Energy Efficiency Advisor. Facility metering can have a variety of applications for the energy manager. The necessity to control costs, diagnose equipment malfunction, allocate usage, and set resource efficiency goals are all increasingly important reasons for energy metering. The plan should describe the need for the Metering & Monitoring, the project(s) to be investigated, data to be collected (meter type, location and sampling rate), and any potential proposed solutions or project outcomes. The plan should:

- Formalize objectives and goals of metering: Identify and confirm goals of stakeholders/users; Prioritize goals as near-term, mid-term, and long-term; Formalize necessary/expected outcomes
- Develop plan structure: Identify data and analysis needs based on necessary outcomes; Develop equipment needs based on data needs; Take advantage of existing infrastructure; Identify responsible staff
- Develop criteria for evaluation metering costs, benefits, and impacts to existing systems, infrastructure, and staff: Determine relative economics of proposal; Justify with cost/benefit, return on investment, or payback metric
- Develop a prioritized implementation plan targeting manageable successes: Screen opportunities based on success potential; Start small/manageable—build off success
- Develop a sustainable plan targeting use, updates, calibration, maintenance, and program reinvestment: Maintain your investment; Make this success visible; Plan for future implementation/reinvestment
- Metering for energy efficiency refers to the measurement of quantities of a product delivered (e.g., kilowatt-hours of electricity, cubic feet of natural gas, pounds of steam, or gallons of water). Metering may also involve identifying times-of-use for the various energy sources, the instantaneous demand for energy, as well as identify energy use for a collection of buildings, individual buildings, rooms, or specific equipment (e.g., a boiler, chiller, or motor).
- Eligible software/equipment includes:
  - any installed meter or data logger that will allow the customer to more carefully track energy consumption (not restricted to electric and gas meters; could include measurement of steam generation or process flow, for example)
  - communication media for the sole purpose of metering
  - software for real time and historical analysis of energy related data
  - existing metering system expansion that incorporates new meter points or adds desirable functionality

What simple payback period would be necessary for you to complete the project(s) identified by Metering & Monitoring?

- 0-12 month payback** (May be eligible for the “performance” Metering & Monitoring application incentives but not project incentives)
- 1-3 year payback**
- 3-5 year payback**
- 5-10 year payback**
- 10-15 year payback**

What other requirements or criteria does the Metering & Monitoring plan need to address in order to move forward with potential project(s) that are identified?

# Metering & Monitoring Application

Table 2 – Base/Performance Metering & Monitoring Incentive Calculation		
Complete rows <u>A</u> , <u>B</u> and <u>C</u> to be included with your “base” incentive application for pre-approval. When the first year of metering and monitoring has been completed and all documentation submitted, complete row <u>D</u> to be included in your “data” incentive application. Once you have identified and completed subsequent projects, complete rows <u>E</u> , <u>F</u> , and <u>G</u> to be submitted with your “performance” Incentive Payment Request.		
A	\$	Anticipated Metering & Monitoring cost
B	\$	25% of cost on line A
C	\$	Maximum possible “base” incentive (capped at the lesser of Line B or \$5,000 )
D	\$	Maximum possible “data” incentive (capped at the lesser of 10% of Line A or \$2,000)
E1		kWh
E2		therms
Actual annual energy savings achieved from projects resulting from the installation of the Metering & Monitoring components.		
F	\$	Potential “performance” incentive = (\$0.02 X Row E1 + \$0.20 X Row E2)
G	\$	Maximum possible “performance” incentive (capped at lesser of Line F or 75% X Line A or \$15,000 )

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

Table 4 - Project Participant Survey	
<b>Barriers to Implementation</b>	
Ameren Illinois understands that energy savings is just one of the many potential benefits of a project. Please identify up to 4 primary barriers that prevented this project from being installed prior to involvement by Ameren Illinois.	
	Unaware of the opportunity or possible solutions.
	Lacked confidence in potential savings.
	Lack of interest or support from company decision-makers.
	Business conditions were not suitable.
	Project payback was too long.
	Other projects or job responsibilities took priority.
	Project implementation costs were too high.
	Lack of capital or access to financing.
	Insufficient internal staffing to manage and advance projects.
	Other (Specify):
<b>Customer Factors</b> Please check the box if the answer to any of the questions regarding this project is yes.	
Yes    No	Does your company have a designated Energy Manager who was involved in this project?
Yes    No	Was this project part of a regulatory mandate? (if yes, please provide an explanation of why incentive money was needed.)
Yes    No	Was this part of a “green” goal or specified energy reduction goal? (if yes, please provide an explanation of why incentive money was needed.)
Yes    No	Is this project the same or similar to a project previously implemented by your company?
Yes    No	Would you have undertaken this project in the near future even without assistance from Ameren Illinois?
Yes    No	Would you consider this project or technology to be typical within your industry? (if no, please explain below)
Yes    No	Are other project benefits more important than energy savings? (if yes, please provide an explanation of other benefits.)

# Metering & Monitoring 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 Programs"** shall mean those projects associated with incentives that are not Standard Programs, including but not limited to: *Custom, New Construction Lighting, and Feasibility Study*. See 1.m) below for a list of Standard Programs.
- f) **"EEM"** shall mean energy efficiency measures.
- g) **"Eligible Customers"** shall mean non-residential electric and/or gas Customers of Ameren Illinois. Each program 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 program. 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 Programs applications: *Lighting, VFD, HVAC, Specialty Equipment, Steam Trap, and Leak Survey and Repair*); or (ii) measures eligible under the Custom Program approved by Ameren Illinois; or (iii) measures found in the Retro-commissioning Program 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 Programs"** shall mean those projects associated with Standard gas or electric EEMs. Standard Programs include 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 for these programs (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 Program Application (see 1.m 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 \$250,000 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 incentives are capped at \$100,000.
- iv) Feasibility Study – the maximum incentive payment for a single Feasibility Study is capped at \$20,000. See the Feasibility Study application for further details.
- v) Leak Survey and Repair – the capped incentive is \$20,000 for a compressed air Leak Survey and Repair project. See the Leaks Survey and Repair application for further criteria.
- vi) Metering & Monitoring – the maximum total incentive payment for Metering & Monitoring is \$22,000. See the Metering & Monitoring application 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. 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 (Rev11)

# Metering & Monitoring Application

## Required Documentation Checklists

### Metering & Monitoring Application Form

- Submit a copy of the Metering & Monitoring proposal showing estimated installed cost of software and/or equipment
- Submit a copy of the structured metering & monitoring plan
- Complete all fields in the Customer and Project Information Section, Table 1 (p. 3)
- Complete the Incentive Calculation, Table 2 (p. 5)
- Complete the Impact Questionnaire and Participant Survey. Tables 3 and 4 (p. 5)
- Contact information for the designated point of contact overseeing the projects

## Customer Signature and Acknowledgment

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 Metering & Monitoring software/equipment that is eligible for incentives under the Program.

By checking this box and signing below, I certify that I have read, understood and agree to the Terms and Conditions listed above (p. 6). **Applications will not be accepted as "complete" unless this box is checked**

**Metering & Monitoring Software/Equipment Estimated Installation Date mm/dd/yyyy** \_\_\_\_\_

**Company Name (Ameren Illinois customer):** \_\_\_\_\_

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

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

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

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

**Name of Energy Efficiency Representative assisting with this project:** \_\_\_\_\_



# Metering & Monitoring Application

## Metering & Monitoring Application Incentive Payment Request

### Required Documentation for Incentive Payment(s):

- Submit a copy of the Metering & Monitoring software/equipment invoice for “base” incentive.
- Provide regular (minimum quarterly) reports of baseline metered data for one year for “data” incentive.
- Complete an updated Incentive Calculation, Table 2 (p. 5), for “performance” incentive.
- Complete and sign this form (Metering & Monitoring Application Incentive Payment Request)

#### Type 1: Satisfactory\* project(s) identified are eligible for Program incentive money.

- Complete and submit this form within 30 days of subsequent project completion. Your Metering & Monitoring application “performance” incentive will be paid once we receive documentation that the subsequent project(s) have been completed. Projects must be submitted within the two years following your Metering & Monitoring application “base” incentive check approval and completed within the current or following two program years, unless an extension is granted by Energy Efficiency staff.

#### Type 2: Project(s) were identified, but they do not meet the eligibility criteria for Program incentives (e.g., payback period is less than a year).

- Complete and submit this form once all subsequent projects are completed. Projects must be completed within the current or following two program years, unless an extension is granted by Energy Efficiency staff. Your “performance” Metering & Monitoring application incentive request will be evaluated for approval once we receive documentation supporting the fact that savings were identified through Metering & Monitoring data and do not meet the criteria for other Program incentives.

*\*Projects must be energy-efficiency projects, equipment optimization, or process improvements, and must meet cost-effectiveness and technical criteria. If you are unsure about the eligibility of your project(s), call 1.866.800.0747 to speak with a representative about your project(s) eligibility. Ameren Illinois reserves the right to make an independent determination of whether or not project(s) are satisfactory.*

I certify that all information provided is correct to the best of my knowledge.

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

“Base” incentive Metering & Monitoring Software/Equipment Installation Date: (mm/dd/yyyy) \_\_\_\_\_

“Data” Incentive: Attach Supporting Documentation

“Performance” incentive Type 1: Project Number: \_\_\_\_\_

“Performance” Incentive Type 2: Attach Supporting Documentation

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

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

*Electronic signatures allowed and accepted by the Business Programs.  
Typing your name above constitutes a valid electronic signature.*

### 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.