

## Application Guide

**This Application Guide provides instruction, guidelines and best practices regarding the participation in the Ameren Illinois Energy Efficiency Program.**

### Application Forms

The application forms contain all of the information you need to participate in the program – eligibility requirements, incentive rates, equipment performance thresholds, and submittal instructions.

Application forms are available on the program website and a separate form is available for each project type:

- [Standard Lighting](#)
- [Process Steam/Steam Trap](#)
- [Standard HVAC/Water Heaters](#)
- [Standard VFD](#)
- [Custom Projects](#)
- [Leak Survey and Repair](#)
- [New Construction Lighting](#)
- [Specialty Equipment – Agriculture](#)
- [Specialty Equipment – Hospitality](#)
- [Specialty Equipment – Industrial Facilities](#)
- [Specialty Equipment - Refrigeration](#)
- [Feasibility Study](#)
- [Metering & Monitoring](#)

**Each application form has four main sections:**

- (1) General Information,
- (2) Customer and Project Information,
- (3) Incentive Calculation Section
- (4) Customer Acknowledgement of Terms and Conditions

The General Information section describes the program goals, eligibility details, incentive offerings, any applicable limitations and caps on the total incentives, and instructions for completing the application.

The Customer and Project information section is used to verify the applicant is an eligible Ameren Illinois customer, confirm the account number submitted for the installation address is on an eligible rate, and to capture the contact information for individuals involved in the energy efficiency project. At the bottom of the Customer and Project Information section, some basic details about the applicant's facility are captured for data tracking purposes. These details vary between forms.

The Incentive Calculation section of the application lists the specific equipment requirements and the incentive levels for different equipment types. Within this section applicants will enter the quantities of equipment related to the project, as well as equipment performance details when needed. This information, combined with detailed guidance in the Incentive Calculation Section, will lead the applicant through the calculation of the proposed incentive amount.

The Customer Acknowledgement of Terms and Conditions is at or near the end of every application. This signature constitutes an agreement between the customer and the program. Applicants and Program Allies need to read the Terms and Conditions carefully and ask questions of program representatives when clarification is needed.

Depending on the application, additional signatures and acknowledgements may be required. These requirements are clearly noted on the forms and are distinguished by the bold "signature box" with related agreement and acceptable signatures. Please review the signature box carefully to ensure the correct party is signing the acknowledgement and an acceptable signature is provided. In many cases, electronic signatures are acceptable, as noted in specific signature boxes.

# Application Guide

[Retro-Commissioning](#) (RCx) projects use application forms with a slightly different format to accommodate the various project phases. RCx applications have separate color-coded sections for Screening, Application, Survey, Installation and Verification. (Note that only Large Facilities RCx includes the screening step.) For each phase, you are only required to submit the information in that section's checklist. The information required for later steps may be submitted as the project moves through the process.

Additionally, RCx must utilize a Retro-commissioning Service Provider (RSP) approved to work on RCx projects supported by the program. Current RSP lists for each of the respective offerings are available to download from the RCx portion of the [AmerenIllinoisSavings.com/Business](http://AmerenIllinoisSavings.com/Business) website.

RCx projects should use one of the following documents to apply:

- [Retro-commissioning for Compressed Air](#)
- [Retro-commissioning for Large Facilities](#)
- [Retro-commissioning for Industrial Refrigeration](#)
- [Retro-commissioning for Grocery Stores](#)
- [Retro-commissioning Lite](#)

Additionally, there are several documents that may be needed for specific situations, but are not required for all applications: The [Large Incentive Request Form \(LIRF\)](#) is a required document for all applications requesting more than \$50,000 in incentives. This form is included as part of the Custom Project application and is available as a separate document in the [Forms Library](#).

The [Payment Release Authorization form](#) is an optional document that may be used if the Ameren Illinois customer wishes to assign payment of the incentive to a third party, such as a contractor or equipment vendor. The Payment Release Authorization form is a separate document, available in the [Forms Library](#).

The [Landlord Consent Form](#) should be used to document the building owner's approval of an energy efficiency project undertaken by a tenant. The Landlord Consent form is a separate document, available in the [Forms Library](#).

## Quick Tips for Faster Application Processing

Submitting complete application packages will speed the application process and allow program representatives to provide preapprovals and incentive payments more quickly. Your application will not be processed until all information is received.

- Please be aware that projects completed Jan. 1, 2018 or later may only receive incentives for eligible equipment if it is (1) self-installed by an employee of the Ameren Illinois customer listed on the application, or (2) installed by an Illinois Commerce Commission-approved Certified Installer. A complete list of Certified Installers can be found at <https://www.icc.illinois.gov/utility/default.aspx?type=28>.
- For all applications, be sure to include manufacturers' specification (cut) sheets with the relevant values for the installed equipment clearly indicated. Key information to highlight or circle includes manufacturer and model number and energy performance specifications such as efficiency ratings.
- While photographs are not required for all measures, they are often beneficial to help verify project and equipment information, particularly if the part number is visible and legible.
- For final applications, include itemized invoices that show item numbers, quantities for each item, and descriptions of sufficient detail to allow program representatives to verify that qualifying equipment was installed and that the equipment quantities indicated on the application are supported by the invoice. Please be sure the manufacturer's name is included on the invoice, along with the part numbers. Please also note on your invoice any items that have extra quantities or items that are not included in the project described in the application.
- When submitting an application with multiple measures, use a Roman numeral for each measure: write it next to the measure on the application, next to the equipment on the invoice, and on the cut sheets submitted with your application paperwork.
- A signed W-9 form is required in order to receive the incentive payment. If the payment is to go to a party other than the Ameren Illinois customer, W-9 forms must be submitted for both parties.
- Contact program representatives with questions prior to submitting an application to ensure that the application is properly completed. Program representatives can be reached via email: [IllinoisBusinessEE@ameren.com](mailto:IllinoisBusinessEE@ameren.com) or by calling toll free 1.866.800.0747.

## Frequently Asked Questions

For a complete listing of Business Program frequently asked questions and their corresponding answers, please visit [AmerenIllinoisSavings.com/FAQ](http://AmerenIllinoisSavings.com/FAQ).

# Application Guide

## Project Pre-Approval Information

### Step 1: Determine if your project requires pre-approval

**Standard projects with incentive requests greater than \$10,000 and ALL Retro-commissioning, Metering & Monitoring, Feasibility Study, New Construction, Strategic Energy Management and Custom projects:** These applications are required to submit an application for pre-approval before any material is purchased or work is begun. Applications for pre-approval will undergo a technical review by program staff, during which time additional information may be requested. Upon completion of the technical review, a pre-approval letter will be issued, usually within two weeks of receipt of the completed application for pre-approval. Once you have received the pre-approval letter, you may purchase and install the proposed equipment.

**Standard projects with incentive requests less than \$10,000:** Standard project applications requesting \$10,000 or less in incentives may optionally request to reserve funds and receive a non-technical review and an Estimated Incentive Letter, usually within two weeks of receipt of the completed application for pre-approval. Once you have received the Estimated Incentive Letter and non-technical review, you may purchase and install the proposed equipment.

---

### Step 2: Complete and submit the appropriate forms

Complete the following for your application for pre-approval:

- ✓ *Customer and Project Information* section of your application (p. 2). If your project requires a Certified Installer, make sure to include the Certified Installer's name exactly as it appears on the Illinois Commerce Commission website (<https://www.icc.illinois.gov/utility/default.aspx?type=28>).
- ✓ *Incentive Calculations* for the proposed equipment (see the Incentive Calculation section of your application).
- ✓ Include any supplemental *Required Documentation* as indicated in the Required Documentation Checklist.
  - For equipment incentives: Attach manufacturers' cut sheets for all energy saving equipment for which you are requesting incentives. Please circle the information showing the equipment meets program technical requirements.
  - There are several supplemental forms required for specific situations, as described below. All supplemental documentation can be found on the Ameren Illinois Energy Efficiency Program's website at [AmerenIllinoisSavings.com/forms](http://AmerenIllinoisSavings.com/forms).
    - [Landlord Consent Form](#) is required if the Ameren Illinois Customer is a tenant.
    - [Payment Release Authorization](#) is required if the incentive is to be paid to a party other than the Ameren Illinois Customer.
    - [Large Incentive Request Form](#) is required if the total requested incentive is over \$25,000.
- ✓ The Ameren Illinois customer must sign and date the *Customer Acknowledgment and Signature*. Your application for pre-approval will not be processed without this signature.
- ✓ Submit your application and all required documentation via e-mail, fax, or hard copy. You will receive an e-mail within two *business days* confirming we received your application.

---

### Step 3: Receive pre-approval letter and begin your project

You can expect to receive your pre-approval letter within two weeks of receipt of your correct and complete application for pre-approval. Your pre-approval letter will include an estimated completion date (usually within 120 days). If your project is estimated to extend beyond this date, contact your Energy Efficiency representative immediately. Once you have received the pre-approval letter, you may purchase and install the proposed equipment.

**NOTE:** If you are considering changes to your scope of work, it is imperative that you contact your Energy Efficiency representative. The Energy Efficiency representative will provide information on how these changes will impact your savings/incentive and the necessary steps required to request incentive changes.

---

### Step 4: Submit the completed *Incentive Payment Request* form within 30 days of project completion

Please contact program representatives with any questions via email at [IllinoisBusinessEE@ameren.com](mailto:IllinoisBusinessEE@ameren.com) or call toll free 1.866.800.0747.