

Ameren Illinois Energy Efficiency Program

# SBDI Program Ally Update

Mike Thompson, Small Business EA Manager

# Why You Are Here Today

1. What's in it for you?
2. Program communications
3. Illinois Commerce Commission (ICC)
4. Project statements/invoices
5. Proper W-9 documentation
6. Photo requirements

*Ask questions & share  
your thoughts in chat.  
We will review at Q&A.*



# What's In It For You Today

- ✓ Clarification on roles and communication with Program staff.
- ✓ Faster turnaround time when processes are understood and followed "**Speed to Check**".
- ✓ Less back and forth communications with processing teams.
- ✓ Accurate assessments to final invoice without scope changes are the best path for fast processing.
- ✓ Quality photos for existing and final (the more the better).
- ✓ We strive to make the process as easy as possible while adhering to requirements.
- ✓ SBDI has the **best incentives** for Business in the region!



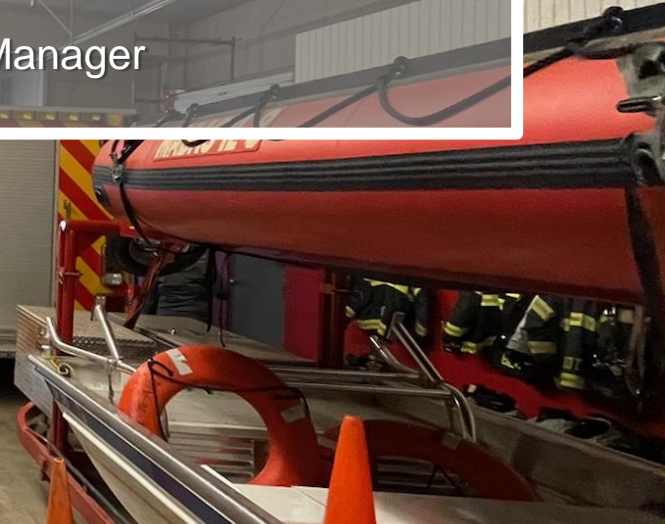
Your primary channel of Program communication is through Your Energy Advisor.

- This is the internal point of contact for the SBDI Program.
  - No direct lines via text, email or phone to support staff.
- The SBEA is your direct source of all Program Communication.
  - Snapshot issues (provide a screenshot if possible) or unlocking of a project.
  - Questions, concerns or Program specific inquiries.
  - Direct assistance and guidance for program processes.
- The SBEA will escalate any issue they cannot handle or answer.
  - SBEAs will reach out to appropriate program staff for resolution.



# Illinois Commerce Commission (ICC)

Tucker Blum, Program Ally Marketing Manager



- Illinois energy legislation requires contractors who are installing energy efficiency measures to be certified with the Illinois Commerce Commission (ICC).
- Applies to any measure that requires an electrical connection.  
**AND**  
Applies to any measure that will receive an incentive of \$300 or more.
- Certified installers agree to comply with building and electrical codes and manufacturer's installation instructions.
- Self-installed measures (those installed by an internal employee or staff member) are excluded from the certification requirement.

- Certified energy efficiency measures installers must submit a recertification report.
- Installer Recertification **must be submitted to the ICC between Jan. 1 – June 1 annually** to avoid ICC late fees.
- There are no fees to recertify, however, late fees could be high if your recertification isn't submitted by June 1 annually.
  - Our Program cannot issue incentive payments until recertification is up to date.



[AmerenIllinoisSavings.com/Installer](https://AmerenIllinoisSavings.com/Installer)

# ICC Recertification Delays and Fines



- Only a \$100 fee for new ICC certifications, June 1 deadline for notarized recertification (***no charge if recertification submitted on time***).
- To avoid possible delays in payments or fees\* from the ICC, we strongly recommend that contractors doing electrical work register and stay in good standing annually with the ICC for the current fiscal year dating back to original filing year.

*\*\*\*Up to a \$1,000 annual fine from the ICC for failure to recertify and not remaining in good standing.*



[ICC.Part462@illinois.gov](mailto:ICC.Part462@illinois.gov)

1.217.782.7434

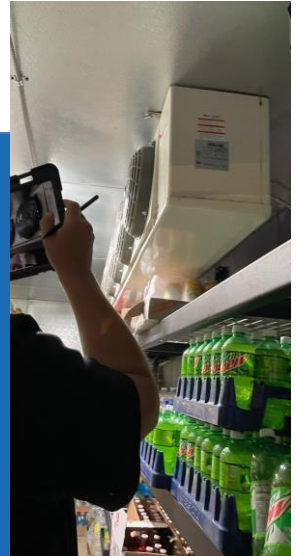




# Points of Emphasis

Mike Thompson, Small Business EA Manager

- What is pre-approval?
  - Is the customer and/or account eligible for SBDI?
  - Assessment evaluation to verify measures are being utilized correctly.
  - Verify eligibility of proposed equipment for installation.
    - For lighting, if it is on the QPL it is eligible.
      - If the equipment is installed as listed and intended.
    - For non-lighting or other non-DLC equipment, spec sheets are still required.
      - Refrigeration measures, remote occupancy sensors.
      - Energy Star is no longer eligible for SBDI due to regulation and TRM changes.
  - Establishes and reserves funding for specific project.
    - Provided scope of project of equipment used has not changed.
  - Establishes the start of project completion timeline.
    - Projects are required to be completed within 90 days of pre-approval.



- What is final approval?
  - Initial process for payment of completed projects.
  - Verification of installation of all equipment as per pre-approved assessment.
    - Specified and eligible equipment installed and operational.
    - Model/Part number match exactly as listed in QPL.
    - Quantities installed as were approved on original assessment.
  - All required documentation has been properly submitted.
    - All pages of the work order, signed by customer upon project completion.
    - Signed W-9 for customer, matching the utility account name.
      - Program Ally W-9 and ACH Form (in Snapshot) required at start of each Program Year.
    - Clear photos to show each type of equipment installed and scope/quantity.
    - Customer invoice to list material and labor.



- Customer information
  - Does the name on the account information match?
    - Is this a landlord/tenant project? Who is requesting the project?
  - What is the connection between the customer and account owner?
    - The account owner is the primary designated recipient of EE benefits.
    - If this is not so, who is and how are they connected?
- Why does this matter?
  - The program is responsible to ensure required IRS reporting is made to proper parties who may incur tax implications.
    - We need to make certain the right parties are being included and notified.
    - This can be a complex scenario and we are here to help you.



## Required Details for Invoices

- Date of Project Completion
- Your Company Name and Address
- Name of Customer and Address
  - Project address if different from mailing address
- Individual Lines of Installed Equipment
  - Information matches DLC 5.1 listing (*or most current DLC listing*).
    - Provide DLC Product ID numbers on the invoice to streamline processing and avoid delays.
    - For non-QPL equipment, a spec sheet will be required.
    - Additional information or location details added to streamline processing and avoid delays.
  - Quantity of equipment installed for project.
- Individual Line of Labor for Project
  - Additional charges for lifts, etc.
- Project Total Cost
  - Ameren Illinois Incentive
  - Customer Co-pay

"Help us Help you"



# Invoice Sample

ABC Company  
1 Shop Dr.  
Peoria, IL 61603

Logo/Information for your business

Need to include Installation location on invoice if not the same as billing address

Invoice Date  
January 1, 2024

Installation completion date

Bill To:  
Customer Name  
1 Location Dr.  
Peoria, IL 61603

Quantity installed at jobsite

Quantity	Description	Cost
2	Manufacturer: Acuity Brands Lighting Model: CSS L96 ALO4 UVOLT SWW3 80CRI High-Bay Luminaire	500.00
1	Labor	500.00
1	Ameren Incentive	- 750.00
Total		250.00

Information matches DLC listing

Can add information about existing equipment, location, etc.

- This is a sample of an acceptable invoice.
  - Date of installation
    - May be different than date of invoicing.
  - Your company name and address
  - Customer name and address
    - Project address if different from mailing address.
  - Equipment installed
    - DLC 5.1 Listing
    - Quantity
  - Labor
  - Line Item Cost
    - Cost for each product
    - Ameren Incentive
    - Customer Co-pay
- You **DO NOT** need to copy or utilize this format.
  - This provides a model for what is required.
- Distributor invoices are **NO** longer accepted.

# Program Expectations

## What the Program needs from you?

- Accurate assessments
  - Correct existing facility evaluation
    - Accurate counts
    - Correct wattage
    - Verified hours of operation for exterior lighting
  - Utilizing eligible equipment
    - Lighting equipment selected from the QPL
    - Spec sheets for all other equipment
- Timely project completion
  - Once pre-approval is granted, you have 90-days to complete the project.
    - Designed for a quick turn-around, be sure to reply to Estimated Completion Date (ECD) messaging if project exceeds initial date. Projects will be voided, could be reopened with exception.
- Complete final documentation
  - All requirements as per Final Assessment section.

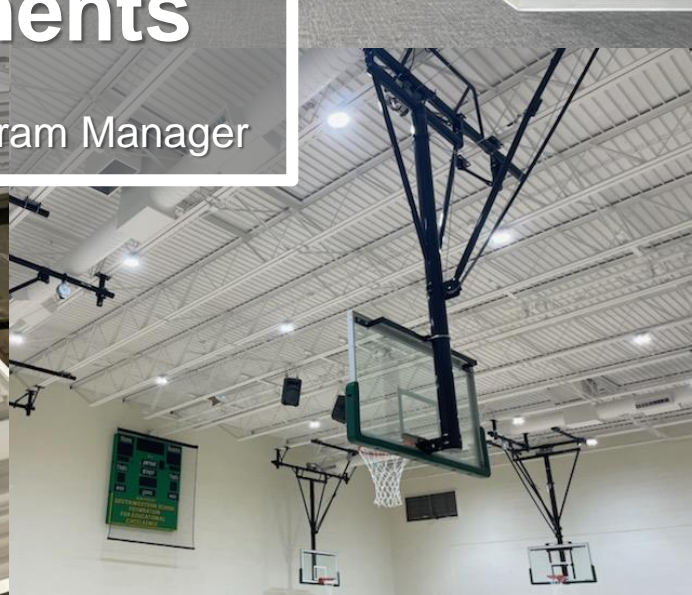
*"We strive to make the process as easy as possible while adhering to requirements."*





# Photo Requirements

Shane Perry, Deputy Business Program Manager





# Photos Tell the Story

## Improving Application Processing Efficiency

- GOAL: Improve overall application documentation to expedite application processing.
- Improved pictures with applications should provide a clear visual of any project's scope.
- Will help reduce back and forth communication and inaccuracies found during inspections.
- Some best captured during installation.

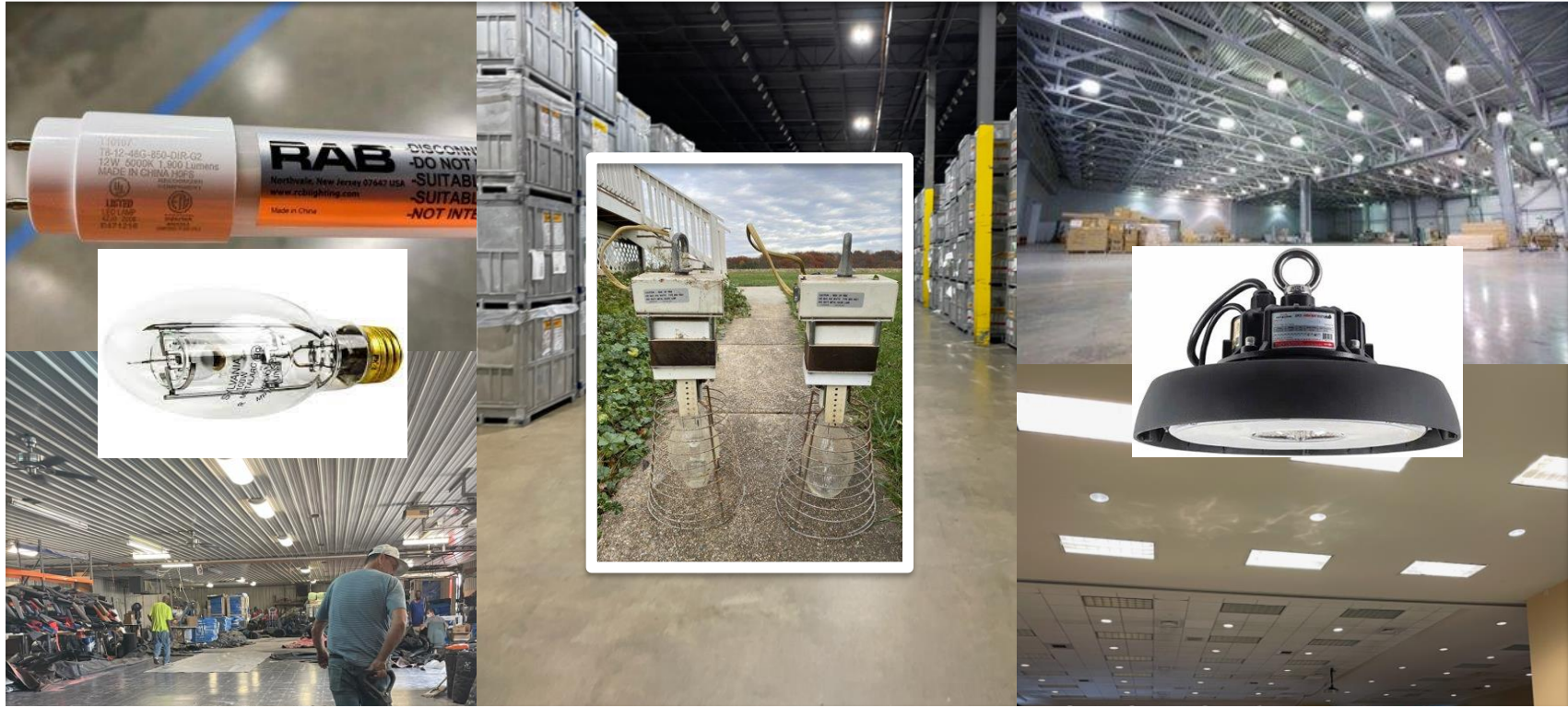
## What to Include

### Pre and Post Photos:

- Two photos per measure (min.).
- Details of old and new items:
  - Model
  - Wattage
- Broader view of project:
  - Equipment installation.
  - Room picture of total light fixtures.
  - Uninstalled equipment.

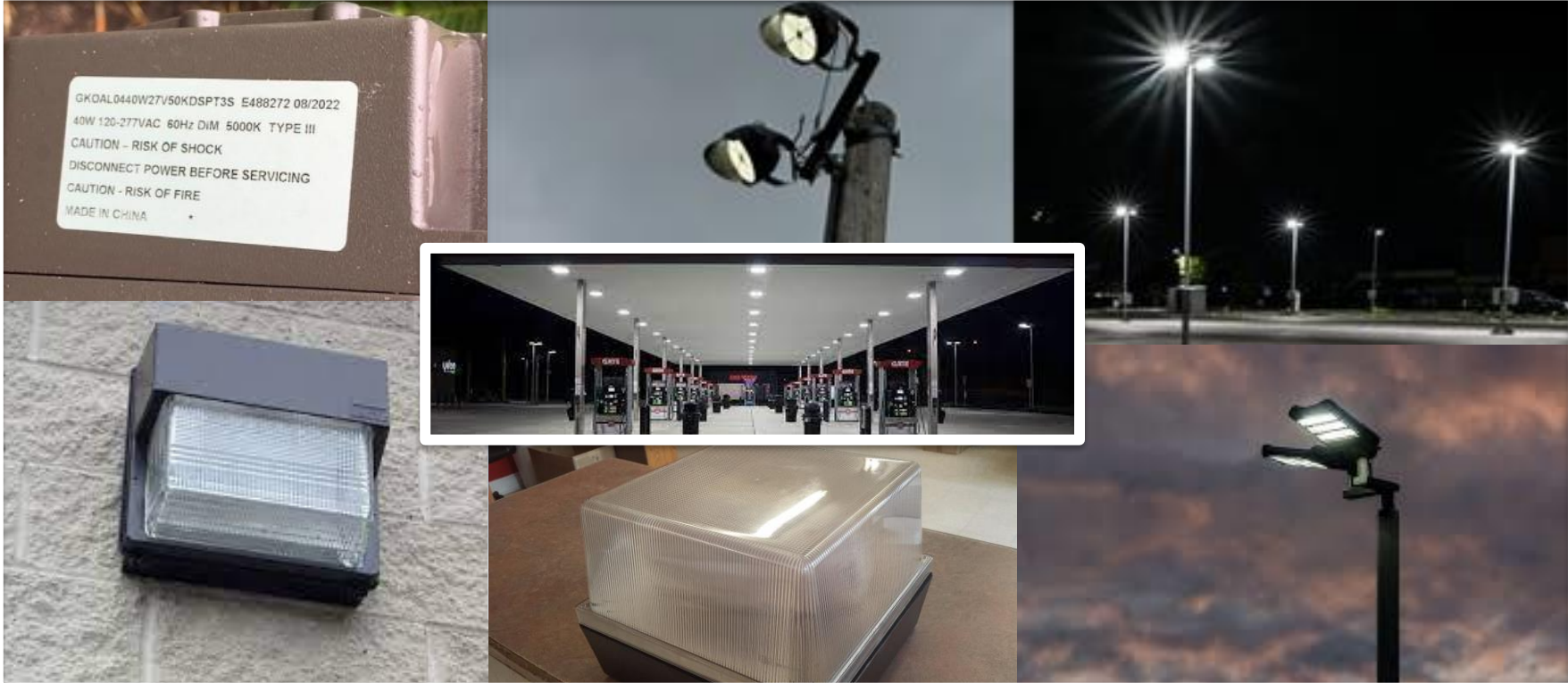
# Interior Lighting Photos

Examples of lamp/ballast labels, fixture close-up and project area scope.



# Exterior Lighting Photos

Examples of lamp/ballast labels, fixture close-up and project area scope.



# In-Progress Photos

Gives best view to verify old lighting and new lighting in 1 picture.







**Energy Efficiency**  
PROGRAM

**[AmerenIllinoisSavings.com](http://AmerenIllinoisSavings.com)**