Small Business Direct Install Channel
Program Ally Implementation Training

Meghan Roath and Mike Thompson

May 22, 2024

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

We understand the challenges you have faced and have worked internally to REMOVE those BARRIERS.

- **Incentive increases: *Effective May 28, 2024***
- **Process changes:**
  - ✓ Paperwork processing (reduced requirements)
  - ✓ Snapshot™ tool modifications (user interface, defaulted fields)
  - ✓ Enhanced Energy Advisor engagement (weekly communication, paperwork review)
  - ✓ Toolkit and Snapshot training (plug-and-play templates, one-on-one snapshot training)

PROGRAM ALLY INCENTIVES

- What incentives are increasing?
- When are the incentive increases effective?

Artwork by Chantell Marlow, member of the Peoria Guild of Black Artists

Ameren ILLINOIS | Energy Efficiency PROGRAM

Increased Incentives

- ❖ Increasing incentives up to $0.85/watt reduced for all LED fixture replacement measures as of May 28, 2024, except for T12 fluorescent existing (previously $0.80/watt reduced).

Measure Name	05/28/2024	Incentive per
LED Highbay Fixture Replacing HID	$0.85	Watts Reduced
LED Fixture Replacing T8 U-Bend Lamps & Ballasts	$0.85	Watts Reduced
LED Fixture replacing existing T8 4' lamps & ballasts	$0.85	Watts Reduced
LED Fixture replacing existing T8 8' lamps & ballasts	$0.85	Watts Reduced
LED Exterior fixture replacing HID	$0.85	Watts Reduced

Ameren ILLINOIS | Energy Efficiency PROGRAM

Program Ally Incentive Information

- Please refer to the Product Incentive List spreadsheet for customer co-pay and Program incentives for each measure, found in the Reference Library in Snapshot™.
- Customer must be informed of any additional fees during the Energy Assessment, which may include taxes, project-specific equipment and other unique charges.
  - These fees are to be included as additional line items in the Assessment Report and to the final invoice as co-pay from the Program Ally to the customer.
- Incentives are not intended to fully cover project costs.

CHANNEL OVERVIEW

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

Ameren ILLINOIS | Energy Efficiency PROGRAM

Artwork by Chantell Marlow, member of the Peoria Guild of Black Artists

SBDI Channel Description

- Only Ameren Illinois electric ***DS-2 and D3-A*** customers (unless otherwise approved) are eligible for the Ameren Illinois Energy Efficiency Small Business Direct Install Program. ***This includes commercial businesses, non-profits and private schools.***
- The SBDI Channel is not designed or intended to provide no-cost projects.
- Energy Assessments are ***FREE*** with an eligible utility account.
- SBDI is unique among Ameren Illinois Energy Efficiency Programs because all incentives are paid to the Small Business Program Ally.
- A copy of the utility bill can confirm rate class, account number, customer information and facility type.
- Other Retail Electric Supplier (RES) are eligible to participate with Ameren Illinois delivery service and their 10-digit electric account number. SnapshotTM fields will automatically default to Ameren Illinois.
- Customer must be interested in doing the project because of the incentives offered. Any customer that pays into the Ameren Illinois Energy Efficiency Program is eligible (unless deemed otherwise through verification).
- The **Small Business Program Ally** and **Small Business Energy Advisor** play critical roles in the SBDI process.

NEW! SBEA and SBPA Roles and Responsibilities

- **Small Business Energy Advisor (SBEA)**
  - ✓ **Manage territory Small Business Program Ally Network and projects.**
    - Pending Install Reports
      - Energy Advisor will communicate with Program Ally weekly on all pending project statuses.
    - Manage all pipeline and completed projects including projects with low annual usage.
      - Energy Advisor will work with Program Ally on all projects in the pipeline and will ensure all paperwork is submitted to ensure timely payment.
    - Energy Advisor will conduct monthly visits to Program Ally.
  - ✓ **Reviews all preliminary and final project paperwork**
- **Small Business Program Ally (SBPA)**
  - ✓ Perform free Energy Assessments.
  - ✓ Provide estimated sales tax on all assessments and get signed W9 for 1099 requirement.
  - ✓ Work with customer to identify any possible project issues prior to installation and inform customer of any additional costs.
  - ✓ Collect applicable project paperwork and submit to Snapshot for approval and payment.
  - ✓ Complete projects and serve Ameren Illinois' customers.

Ameren ILLINOIS | Energy Efficiency PROGRAM

NEW! Program Staff Roles and Responsibilities

❖Qualified Product List (QPL)

- Now featuring approved DLC measures for the majority of lighting measures.
- Spec sheets are required for eligible equipment not included in the DLC.
- ***Evidence of unapproved materials being used on a project will result in incentive payment being withheld until the issue is resolved!***

❖Program Team Coordinator (Meghan Roath)

- Process final paperwork and incentive payments to SBPA.
- Contacts SBEA with requests, inspections reports and statements to coordinate with Program Ally.
- Distributes communication on requirements to Program Allies and conducts training.
- Works with SBEA on project exceptions, and aids the SBEA and SBPAs.
- Meghan Roath – mroath@ameren.com and BUS Data Team – SmallBizIL@ameren.com

❖Program Team EA Manager (Mike Thompson)

- Manages SBEA and SBPA networks, escalates project issues and completes inspections.
- Mike Thompson – mthompson2@ameren.com

Ameren ILLINOIS | Energy Efficiency PROGRAM

SBEA and Territory Guide

- **Territory 1 -**
  - **Gretchen Primeau** (309) 512-2778 GPrimeau@ameren.com
- **Territory 2 -**
  - **John Griffard** (309) 262-2749 JGriffard@ameren.com
- **Territory 3 -**
  - **Greg Ward** (262) 336-4274 GWard@ameren.com
- **Territory 4 -**
  - ***Coming Soon*** (309) 213-0336 MThompson2@ameren.com
- **Territory 5 -**
  - **Jason Noe** (262-409-1232) JNoe@ameren.com
- **Territory 6 -**
  - **Jarod Thompson** (618) 772-9312 JTthompson9@ameren.com
- **Territory 7 -**
  - **Terry Tebbe** (618) 972-0695 TTebbe@ameren.com

Ameren ILLINOIS | Energy Efficiency PROGRAM

Assessment Guidelines

Small Business Program Ally (SBPA)

- Submit all paperwork for pre-approval and payment.
- Change status as appropriately and notify completion to the SBEA.
- Enroll eligible customers in the SBDI Program.

Small Business Energy Advisor (SBEA)

- Shadow first five assessments of new Program Ally.
- Verify all paperwork for pre-approval and payment.
- Opportunities for ride-a-longs as needed/requested.
- Weekly/daily communication to Meghan Roath to ensure questions are being answered.
- Monthly meetings with all Program Allies.
- Conduct inspections once project completed
- Review final completion paperwork for payment processing.

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

REMOVING PROCESS BARRIERS TO IMPLEMENTATION

- What is needed?
- What is changing?

Artwork by Chantell Marlow, member of the Peoria Guild of Black Artists

Ameren ILLINOIS | Energy Efficiency PROGRAM

Streamlined Paperwork Requirements

Pre-Approval Requirements:	Final Paperwork Requirements:
•**Signed and Completed Assessment** •**A copy of the Utility Bill OR all Snapshot™ fields populated correctly** •An uploaded copy of the Utility Bill will help prevent the potential for project rejection. •**Before Photos (per unique measure – no area photo needed)** •Existing fixtures over 400-watts nominal require photo documentation of fixture nameplates and/or wattage stamp on lamp. •**Spec Sheets (for eligible non-QPL measures)**	•**Signed and Completed Work Order** •Handwritten changes allowable for quantity changes ONLY •Must be initialed & signed by customer & Program Ally •**Signed and Completed customer W-9 form** •**Customer Invoice (template)** •**After Photos (per unique measure – no area photo needed)** •Existing fixtures over 400-watts nominal require photo documentation of fixture nameplates and/or wattage stamp on lamp.

The Power of One Document

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

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

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

Reviewing the Ameren Illinois Utility Bill

1. DS2/D3A rate code
   - Always shown on detail page of bill after “Small General Service”
2. 10-digit account number
   - Shown on the top left of the detail page of the bill
3. Customer name and address
   - Must match utility bill
4. Ameren Illinois Energy Efficiency Program charges
   - Charged to all Ameren electric bills to fund energy efficiency programs
5. Any issues finding the account number or verifying eligibility:
   - Ameren Illinois Energy Efficiency Customer Service Call Center – 866.800.0747

Ameren Illinois Utility Bill Features

(Rate Code) → DS-2 Small General Delivery

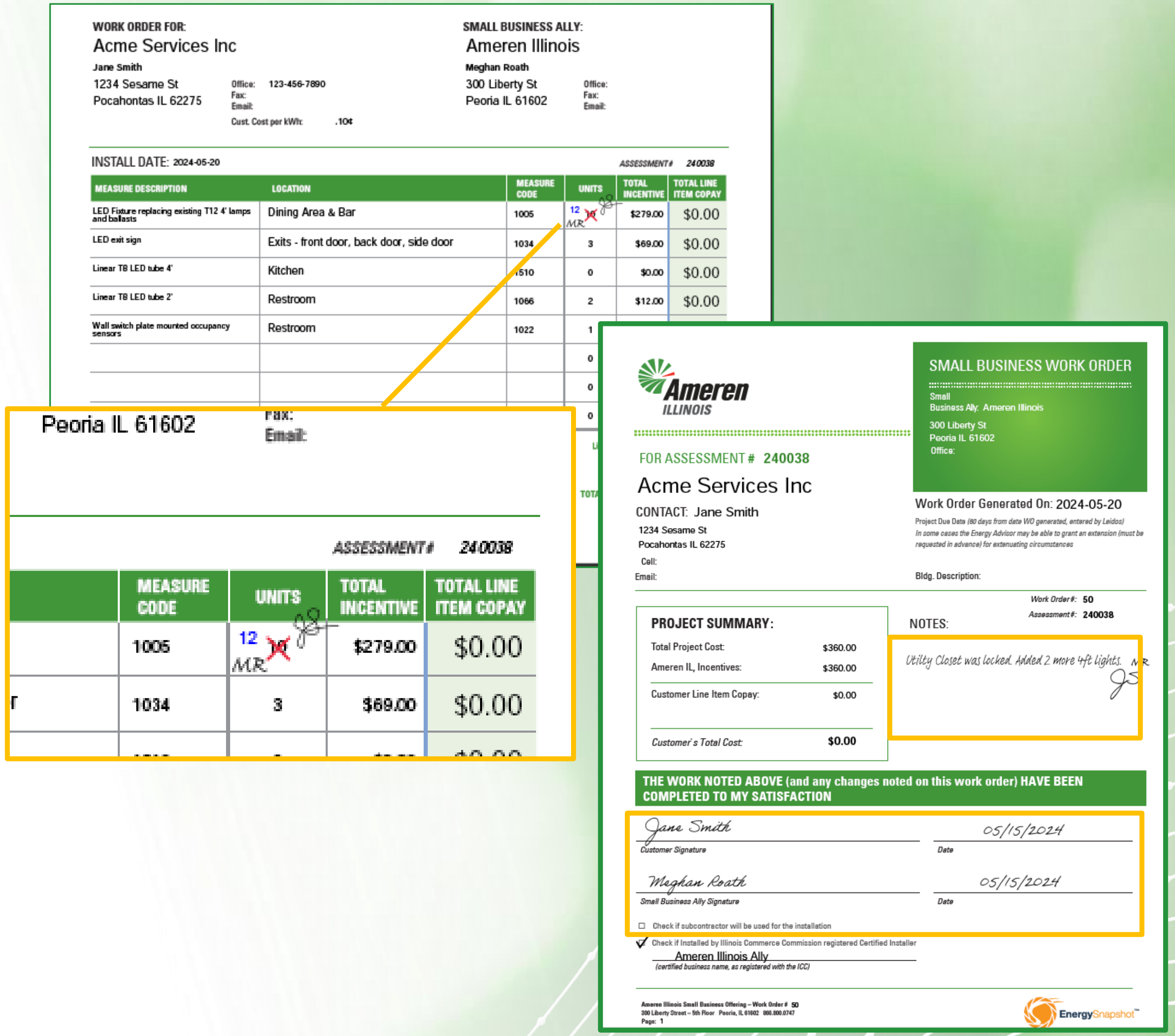
(EE Funding) → Energy Efficiency Programs Charge

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

Ameren ILLINOIS | Energy Efficiency PROGRAM

Updated Work Order Process

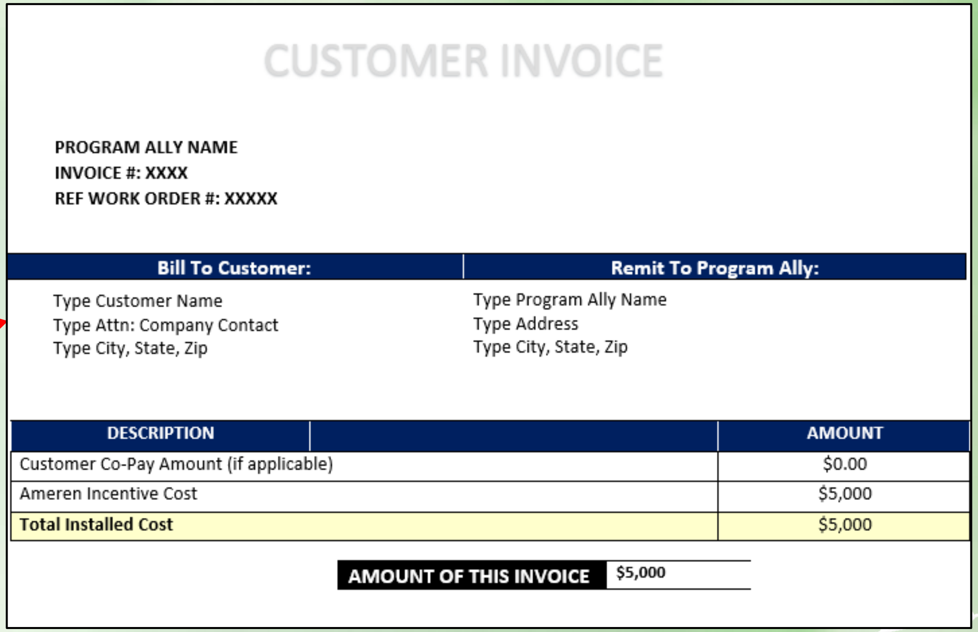
- SBPA completes all work within 90 days of pre-approval.
  - ✓ Enter the scheduled install date in the Estimated Date of Install field in the Approvals Tab in Snapshot™.
- SBPA may make *minor* adjustments to work orders in the field (i.e., incorrect quantities _only_).
  - ✓ Modified work orders require SBPA mark-up and customer signature and customer initials on each change. SBEA will verify this.
  - ✓ All incentives/co-pay changes must be clearly identified to the customer and legibly noted on submitted work order and invoice.
  - ✓ A change in equipment measures will require a new work order to be generated and signed by the customer.



Work Order Process (cont'd)

❖SBPA submits all final paperwork to Snapshot per project.

- Signed energy assessment report
- Completed work order signed by *customer* and *SBPA*
- SBPA invoice to customer (see our ***newly*** featured template for ease of invoicing)
- Correct W9 for 1099 requirements
- All required photos with clear images per unique measure
  - Photo documentation of existing lighting greater than 400 watts nominal.


CUSTOMER INVOICE

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

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

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

AMOUNT OF THIS INVOICE $5,000

❖Incentive payment issued directly to SBPA within 60 days of submittal of all final paperwork.

- Incentive check lead time may be extended due to missing Program requirements (e.g., incorrect material used, outstanding inspection issues, ICC certification still pending, ACH/W9 forms expired or missing, etc.).
- All current completed projects are combined into one check.
- SBPA Supervisor has access to the My Check Batches Report in Snapshot which outlines the processed check batches and the SBPA's projects and incentives included in each.

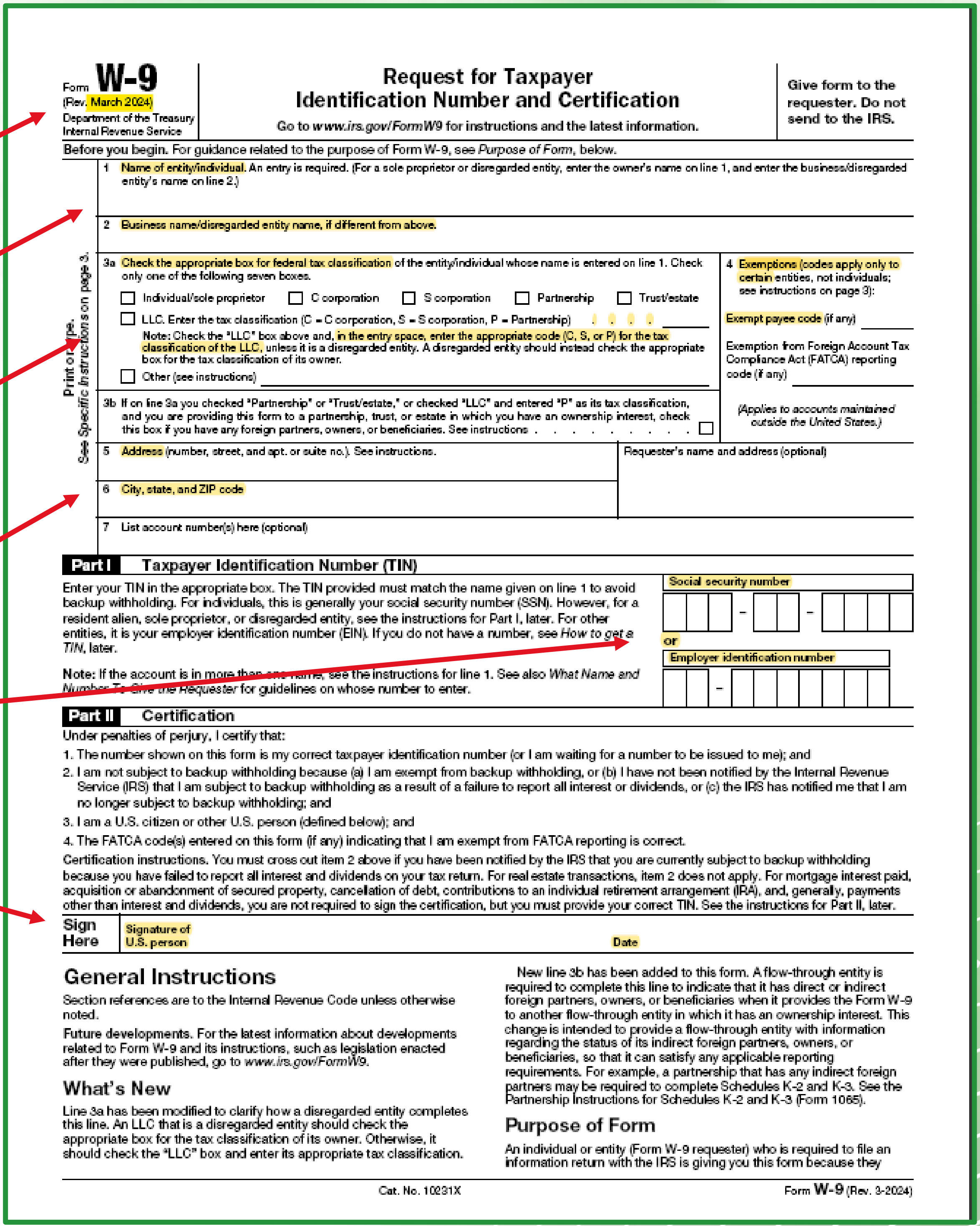
Ameren ILLINOIS | Energy Efficiency PROGRAM

W-9 Form (Required)

❖Requirements

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

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



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

Request for Taxpayer Identification Number and Certification

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

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

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

Print or type. See *Specific Instructions* on page 3.

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

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

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

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

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

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

☐ Other (see instructions)

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

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

Exempt payee code (if any)

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

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions.

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

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

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

Social security number

or

Employer identification number

Part II Certification

Under penalties of perjury, I certify that:

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

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

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

General Instructions

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

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

What's New

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

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

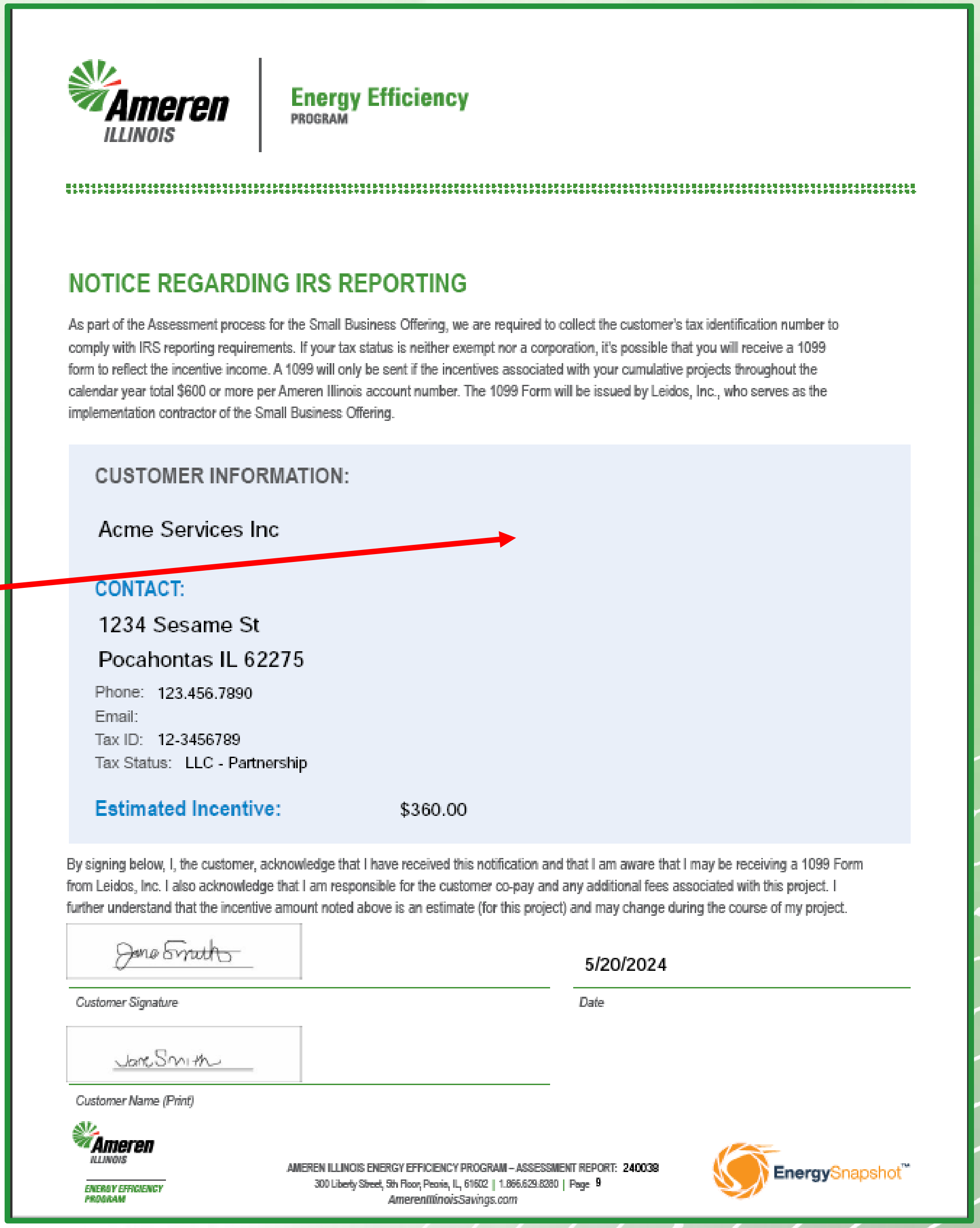
Purpose of Form

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

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

IRS Reporting Page – W-9s and 1099s

- When the Business Name doesn't match the utility account holder's name... that’s OK!
- A checkbox has been added to the IRS Reporting Page for this purpose.
  - The customer can simply check this box to:
    1. Acknowledge the situation, and
    2. Accept responsibility for the savings and potential 1099 at the end of the year.



Ameren ILLINOIS | Energy Efficiency PROGRAM

NOTICE REGARDING IRS REPORTING

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

CUSTOMER INFORMATION:

Acme Services Inc

CONTACT:

1234 Sesame St
Pocahontas IL 62275

Phone: 123.456.7890
Email:
Tax ID: 12-3456789
Tax Status: LLC - Partnership

Estimated Incentive: $360.00

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

Jane Smith | 5/20/2024
Customer Signature | Date

Jane Smith
Customer Name (Print)

Ameren ILLINOIS ENERGY EFFICIENCY PROGRAM

AMEREN ILLINOIS ENERGY EFFICIENCY PROGRAM – ASSESSMENT REPORT: 240038
300 Liberty Street, 5th Floor, Peoria, IL, 61602 | 1.866.629.8280 | Page 9
AmerenIllinoisSavings.com

EnergySnapshot™

Ameren ILLINOIS | Energy Efficiency PROGRAM

CUSTOMER SATISFACTION

- What is needed to be successful?

Ameren ILLINOIS | Energy Efficiency PROGRAM

Artwork by Chantell Marlow, member of the Peoria Guild of Black Artists

To Be Successful… We Need You!

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

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

Post Installation Inspections

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

Inspections Criteria and Ramifications

- If faulty work is discovered by the Ameren Illinois Energy Efficiency Program during the post-installation inspection or brought to the attention of the Program by the customer, the program can take the following actions:
  - **One to two jobs reporting faulty work**
    - Program Ally given an opportunity to correct any issues and maintains program eligibility.
  - **Three to four jobs reporting faulty work**
    - Program Ally reminded of Program quality expectations and maintains program eligibility.
    - SBEA will inspect all future projects until work meets Program standards.
  - **Greater than Five jobs reporting faulty work**
    - Program Ally may not perform any Program work or be assigned any new work orders.
    - Program Ally will meet with Program staff to discuss possible solutions moving forward.
    - As a result of this meeting, Program Ally will either be reinstated to continue Program work, or lose Program eligibility status.

Existing Customers

- Create and review a list of all your current customers who could benefit from the Program. Possible targets include small businesses you do business with. Who do you…
  - bank with? . . . . invest with? . . . . buy insurance from?
  - perform routine maintenance for? . . . . perform service calls for?
  - Don’t forget veterinarians, doctors, car dealerships, restaurants, hair salons…
- Provides a great opportunity for you to approach customers with additional Ameren Illinois Energy Efficiency incentive.
- Reminds your customers of your services and promotes customer loyalty.
- Successful installations will gain referral work and increase your customer base.
- SBPA / Ameren Illinois Energy Efficiency Small Business Program co-branded literature available for your distribution.

Program Tips!

❖ If you don’t know or aren’t sure… **ASK!**
- Your SBEA is readily available to help you on a day-to-day basis.

❖ *ALWAYS use the* ***six-digit project number*** *when referring to a project.*
- **<u>It is imperative that this number is included in the subject line of all project email correspondence.</u>**
- Keep all new/pending/completed project paperwork in one place or file for quick reference (use the project number in the file title for easy searching). Upload to Snapshot quickly for ease of processing.

❖ Become familiar with other Ameren Illinois Energy Efficiency Program Initiatives to maximize your income potential at each customer project.

Snapshot Enhancements

- What is new?
- What is changing?

Ameren ILLINOIS | Energy Efficiency PROGRAM

Artwork by Chantell Marlow, member of the Peoria Guild of Black Artists

What's Changed in Snapshot™?

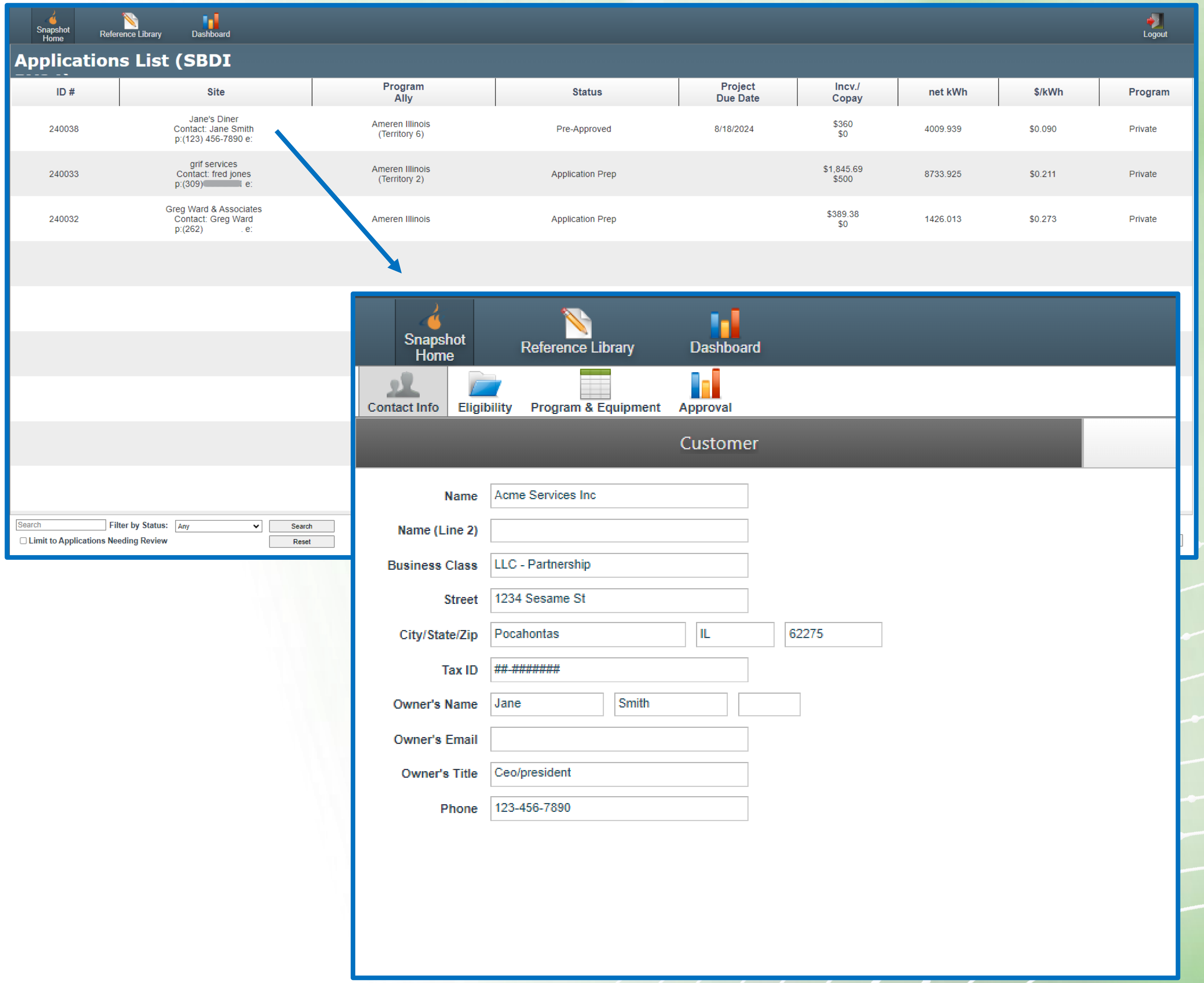
- **The Program Ally User Experience**
  - ✓ The layout is updated to match last year's user experience for ease of navigation and efficiency. It looks and feels like home!
- **Site Nickname:**
  - ✓ We've added a field in the Site Tab for the business's nickname or "slang" name, for when it doesn't match the Utility Account.
- **Electric Provider Field**
  - ✓ We've made this field (on the Operations Tab) auto-default to Ameren Illinois.
- **Estimated Install Date field**
  - ✓ We've added this field for the Ally to easily schedule, track and implement their date of installation.
- **Utility Bill folder**
  - ✓ An additional folder added for the convenience of housing that customer Utility Bill!

Ameren ILLINOIS | Energy Efficiency PROGRAM

Program Ally User Experience

Home Page after Log-In:

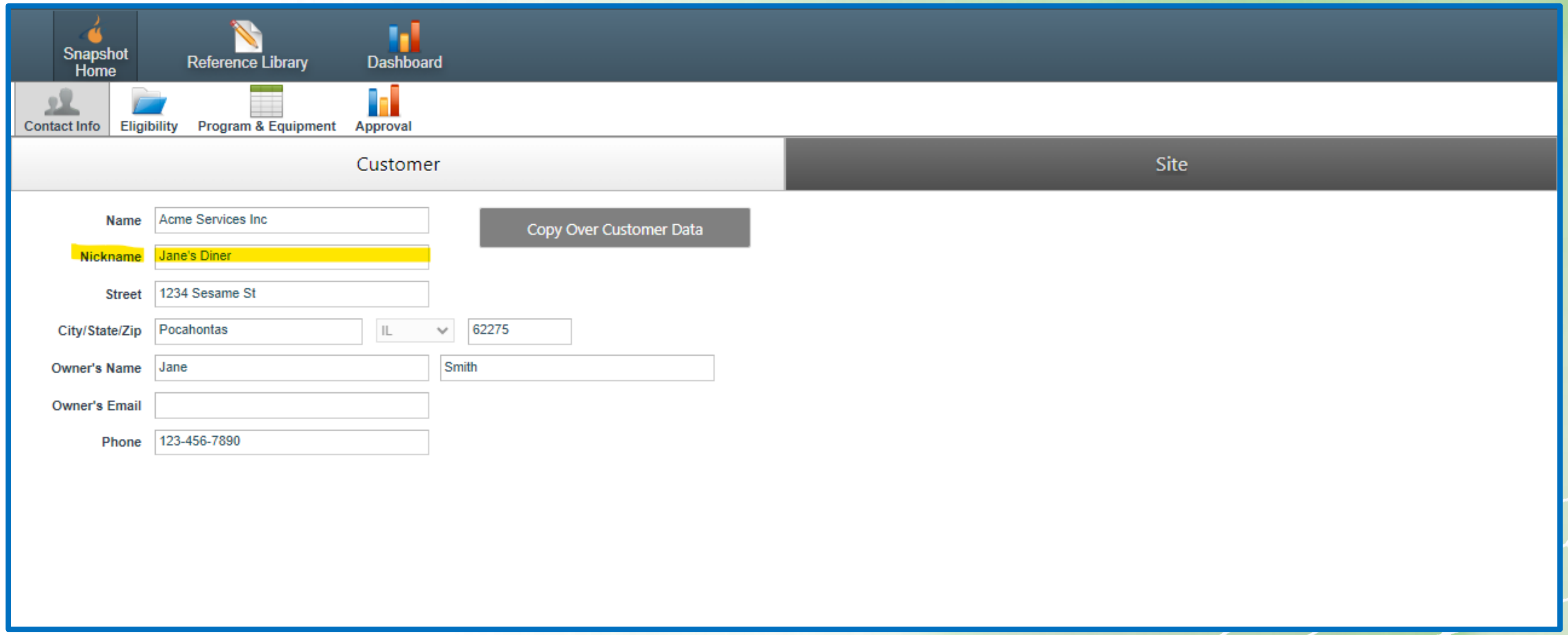
- We've brought back the simple design using navigational icons.
- Each icon features the same informational tabs you are used to!



Ameren ILLINOIS | Energy Efficiency PROGRAM

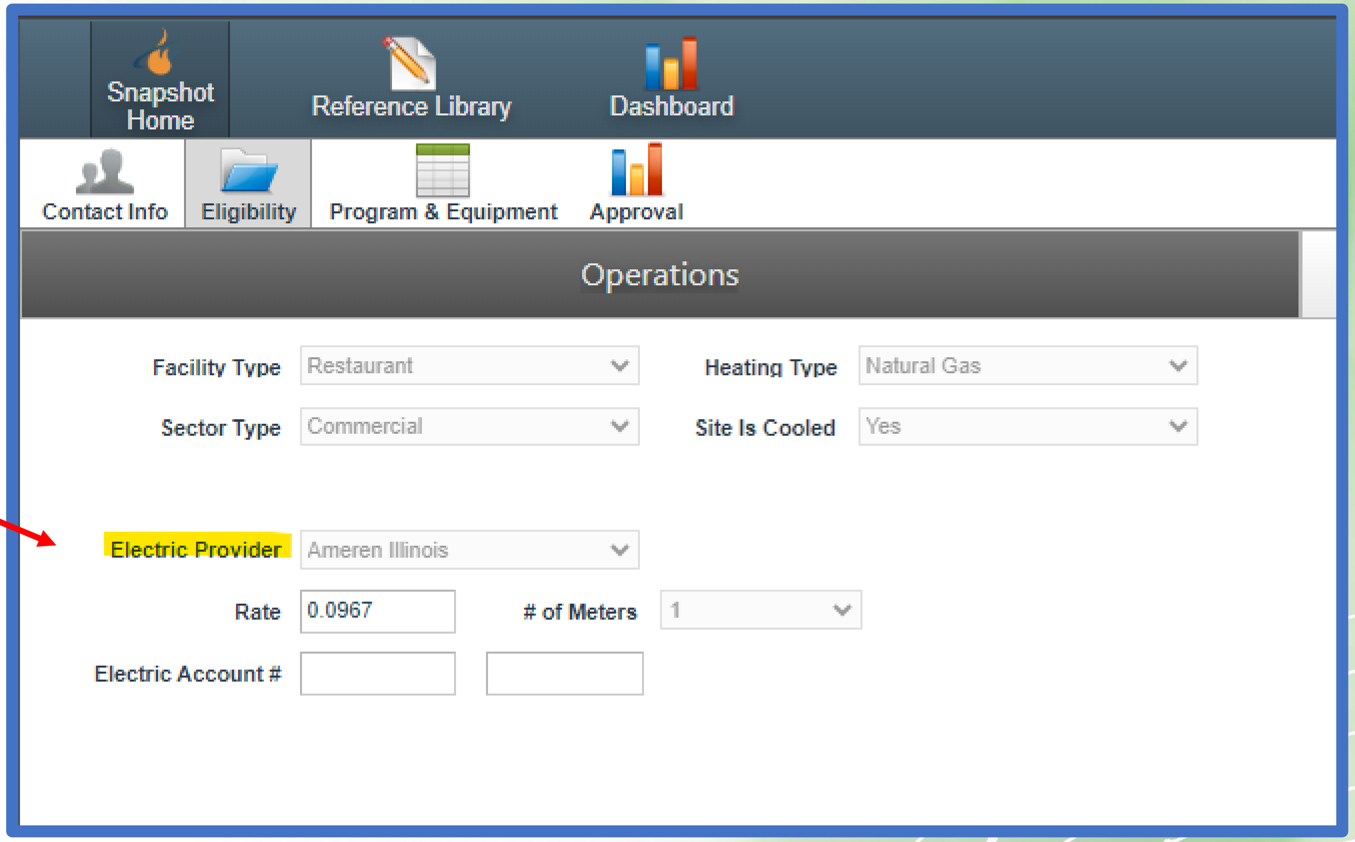
Site Nickname

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



Ameren Utility Field

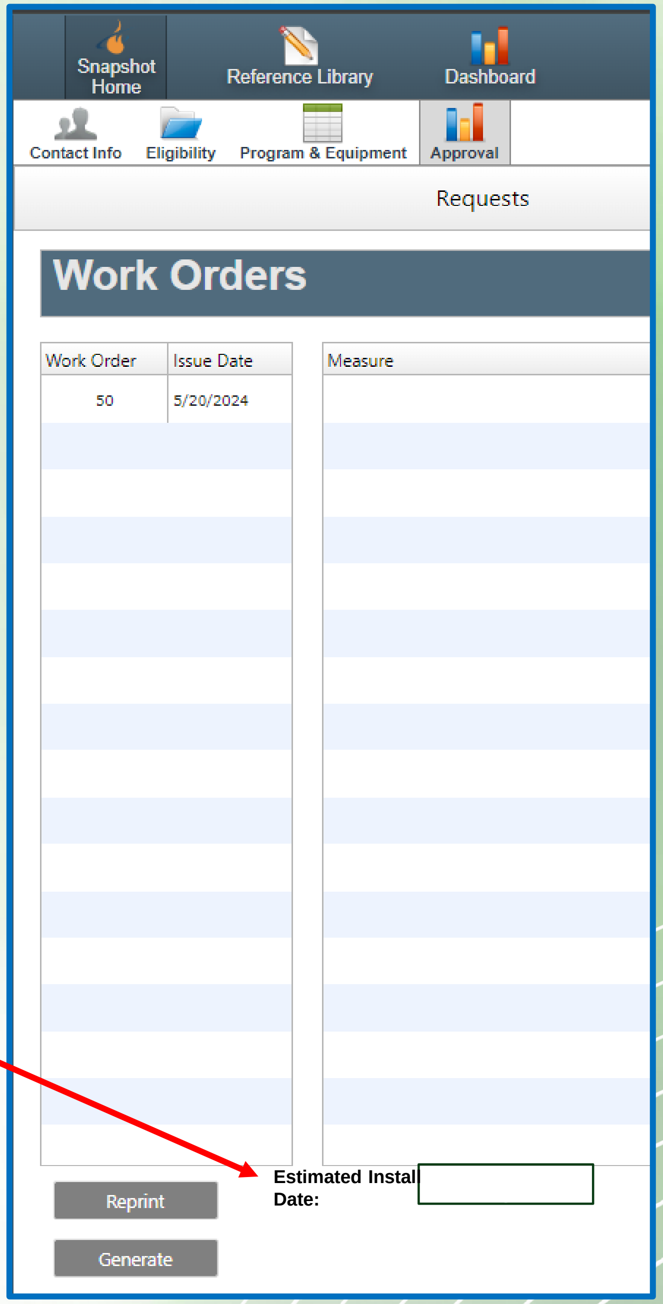
- The Electric Provider Field will automatically default to Ameren Illinois.



Ameren ILLINOIS | Energy Efficiency PROGRAM

Estimated Install Date

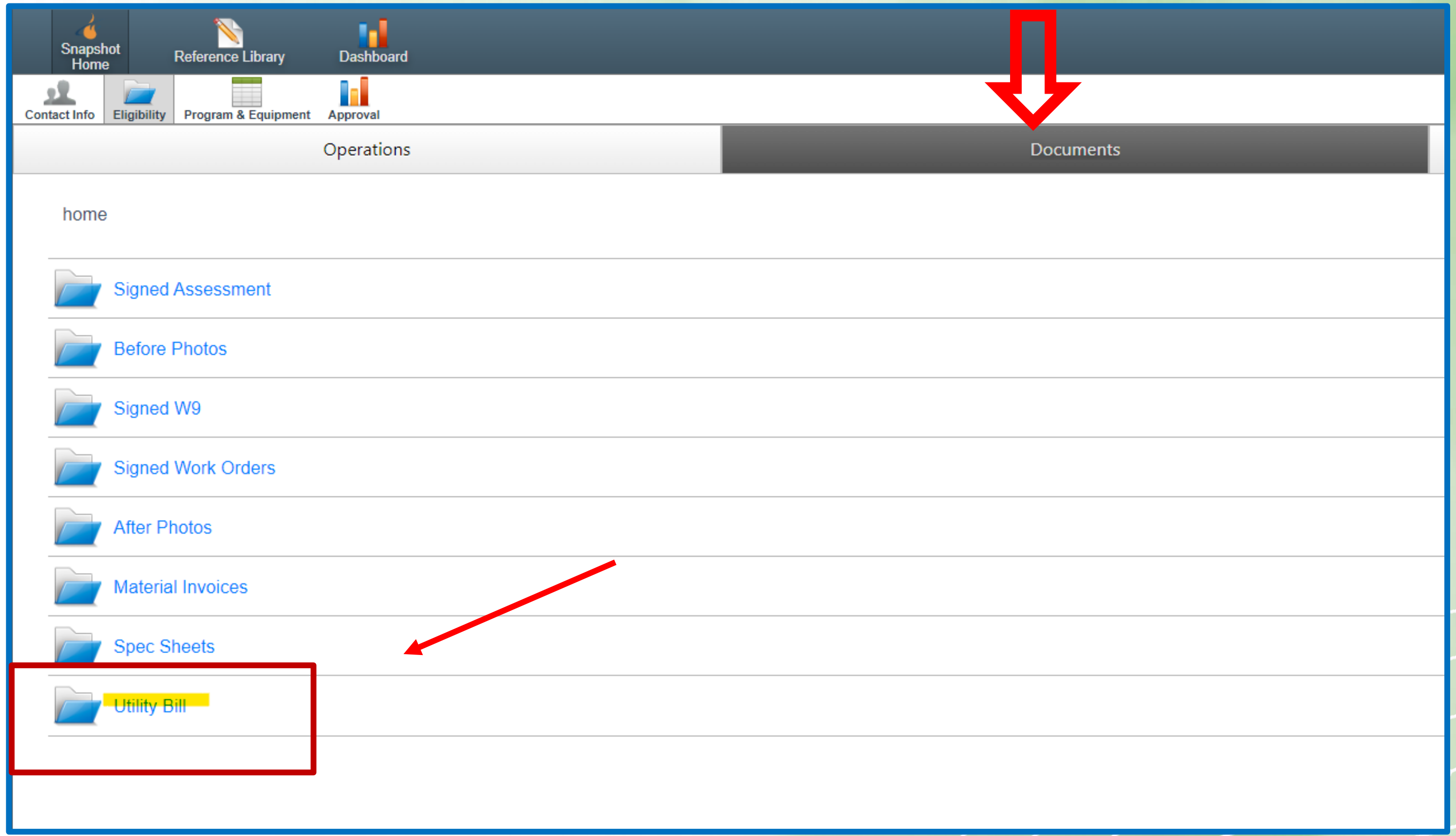
- We've brought back the Estimated Install Date Field.
- Located in Approval, on the Work Orders Tab, to the right of the Work Order *Reprint and Generate* buttons.
  - Simply enter your estimated date of install before clicking the *Generate* button.
  - Both you and your SBEA can track and manage the project completion and details as needed!



Energy Efficiency PROGRAM

Utility Bill Folder

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



Ameren ILLINOIS | Energy Efficiency PROGRAM

SnapShot™ Tips

- ❖Doesn't need internet connection unless syncing.
- ❖Data from your coworkers will sync to your iPad as well.
- ❖Assessments may need to be exited and re-entered before data is refreshed.
- ❖The iPad will need to completely power down from time to time to keep the software operating at an optimal level.
- ❖If you are experiencing any issues with the software:
  - Contact your SBEA first. They have the most experience with the tool and may be able to help you solve the problem.
  - If your SBEA can't find a solution: he/she will help you contact the software support Program staff member and work to help expedite a solution.

SnapShot™ Software Updates

- Software updates will occur as needed.
  - Significant measure or calculation changes, etc.
  - Significant interface / assessment report / work order changes, etc.
  - Software general housekeeping or cleanup needed.
- All users will be given advance notice (via email) of an upcoming software update.
  - All users must perform a full and successful sync before an update. Failure to do so will result in lost data / assessments.
- Users will be given instructions (via email) on how to install any software updates.
  - All users will typically be required to run the “updater” option of the database home screen and perform a sync after running the update. *Always follow the emailed instructions!*
- It is **<u>VERY</u>** important to be on the lookout for any email from Program staff pertaining to a SnapShot™ update.

How the Program is Committed to Helping <u>YOU</u>

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

  <u>**ASK**</u>! We can make it happen!

Questions and Answers

Ameren ILLINOIS

Energy Efficiency PROGRAM