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## Standard HVAC/Water Heaters Application

### Does your facility qualify?

- Privately-owned, non-residential facility (public facilities are eligible through the Illinois Energy Now program; visit [www.illinoisenergy.org](http://www.illinoisenergy.org) for details)
- Electric delivery service rate DS2, DS3, DS4, DS5, or DS6 and Energy Efficiency Demand Response surcharge on Ameren Illinois bill for all electric projects
- Gas delivery service rate GDS2, GDS3, GDS4, GDS5, or GDS7 and Gas Energy Efficiency Cost Recovery surcharge on Ameren Illinois bill for all gas projects

### Does your project qualify?

- Installing new, energy efficient equipment
- New equipment meets eligibility guidelines as specified in this application
- Estimated project completion date is on or after June 1, 2016, and by May 31, 2017

### What you should know before beginning:

- Preapproval is **required** for ALL Standard Application projects requesting more than \$10,000 of incentive money. Do not purchase (including generating purchase orders) new equipment until receiving an official preapproval letter.
- Multiple incentive applications less than \$10,000 at the same facility within 120 days of each other will not be accepted. Phased projects requesting less than \$10,000 may submit separate applications when completion dates are at least 120 days apart.
- Stockpiles of equipment are not allowed: all incentivized material must be installed and operational.
- Projects must be completed within 120 days of equipment purchase date.
- Final application paperwork is due within 30 days of project completion.
- Electric projects are capped at \$500,000.
- Gas projects are capped at \$250,000.
- Incentive applications are also capped at the project cost, which includes the costs of material and external labor (internal labor is not considered).
- Application paperwork can be submitted via email or hard copy. Emails that include “zip” files cannot be received. You will receive a confirmation email within two business days of submitting an application; please contact us if you do not receive a confirmation email.

### Participation instructions:

- **Step One:** Determine if your project requires preapproval. If the total incentive request is over \$10,000, preapproval is **required**.
- **Step Two, Track A:** If preapproval is required, submit the application for preapproval and 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, Track B:** If preapproval is not necessary, an application for “funds reserved” may be submitted, or the project may begin.
- **Step Three:** Within 30 days of project completion (all equipment installed and operational), submit a completed Incentive Payment Request form and all supporting documentation requested (or an entire application if not previously submitted). 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 ([www.ActOnenergy.com/portals/0/business/forms/application-guide.pdf](http://www.ActOnenergy.com/portals/0/business/forms/application-guide.pdf)).

# Standard HVAC/Water Heaters 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:*		
Tax ID (SSN/FEIN)		Ameren Illinois Natural Gas Account Number:*		
Mailing Address			City	State <b>IL</b>
Contact Name			Title	
E-mail Address	Phone	Ext.	Fax	
Secondary Contact Name (if applicable)	Phone	E-mail Address		
Physical Installation Address (if different than above)				
Installation Address		City	State <b>IL</b>	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		
Contractor/Program Ally Information (if applicable)				
Company Name	Contact Name		Title	
Mailing Address	City		State	Zip
E-mail Address	Phone	Ext.	Fax	
Facility/Project Description				
Facility Type (check one):	Hospital	Religious Building		
Assembly	Hotel/Motel	Restaurant		
Assisted Living	Manufacturing Facility	Retail Dept. Store		
College	Multifamily Common Areas	Retail Strip Mall		
Convenience Store	Movie Theater	Multiple (please include an itemized description of the work that will be done at each facility type)		
Elementary School	Office – High Rise (10+ floors)	Warehouse		
Grocery	Office – Low Rise (<5 floors)	Unknown/Misc		
Healthcare clinic	Office – Mid Rise (5-9 floors)			
High School				
For hospitals and high rise offices, specify HVAC system type:	Project Description (check one):			
CAV (no economizer)	Replacement of Failed Equipment			
CAV (with economizer)	Replacement of Operating Equipment(retrofit)			
VAV	Process Improvement			
FCU	New Construction – Existing Facility			
Facility Size (total interior square feet served by the account number provided above):	New Construction – New Building			

**Newer application versions posted to the Ameren Illinois Energy Efficiency Program website supersede all previous versions. The revision number is listed in the footer of each page. If you received pre-approval, the version of the application that was available at the time you submitted your pre-approval application will apply. If you did not obtain pre-approval, the version of the application that corresponds with the purchase dates of your equipment will apply.**

# Standard HVAC/Water Heaters Application

## Incentive Calculation Section

<b>Unitary and Split Air Conditioning Systems and Air Source Heat Pumps</b>	<b>Eligibility Criteria:</b>					
	<b>BPC2:</b> Existing: Can be a new installation or replacement of an existing unitary or split air conditioner, or air source heat pump up to 65,000 Btuh input with a new unit of equivalent size New: Unitary or split air conditioner, or air source heat pump up to 65,000 Btuh input (replacing unit of equivalent size) with minimum 15 SEER					
	<b>BPC4:</b> Existing: Can be a new installation or replacement of an existing unitary or split air conditioner, or air source heat pump 65,000 to 134,999 Btuh input with a new unit of equivalent size New: Unitary or split air conditioner, or air source heat pump 65,000 to 134,999 Btuh input (replacing unit of equivalent size) with minimum 12 EER					
	<b>BPC25:</b> Existing: Can be a new installation or replacement of an existing unitary or split air conditioner, or air source heat pump 135,000 to 239,999 Btuh input with a new unit of equivalent size New: Unitary or split air conditioner, or air source heat pump 135,000 to 239,999 Btuh input (replacing unit of equivalent size) with minimum 12.1 EER					
	<b>BPC6:</b> Existing: Can be a new installation or replacement of an existing unitary or split air conditioner, or air source heat pump 240,000 to 759,999 Btuh input with a new unit of equivalent size New: Unitary or split air conditioner, or air source heat pump 240,000 to 759,999 Btuh input (replacing unit of equivalent size) with minimum 10.8 EER					
	<b>BPC8:</b> Existing: Can be a new installation or replacement of an existing unitary or split air conditioner, or air source heat pump 760,000 or more Btuh input with a new unit of equivalent size New: Unitary or split air conditioner, or air source heat pump 760,000 or more Btuh input (replacing unit of equivalent size) with minimum 10.2 EER					
	Measure Code	Description	New Unit Efficiency Rating	Actual New Unit kBtuh	Number of Units Installed (A)	Incentive (B)
BPC2	Up to 65,000 Btuh input, minimum 15 SEER	_____ SEER Rating			\$50/unit installed	
BPC4	65,000 to 134,999 Btuh input, minimum 12 EER	_____ EER Rating			\$50/unit installed	
BPC25	135,000 to 239,999 Btuh input, minimum 12.1 EER	_____ EER Rating			\$150/unit installed	
BPC6	240,000 to 759,999 Btuh input, minimum 10.8 EER	_____ EER Rating			\$300/unit installed	
BPC8	760,000 or more Btuh input, minimum 10.2 EER	_____ EER Rating			\$500/unit installed	

# Standard HVAC/Water Heaters Application

<b>Air-cooled Chillers</b>	<p><b>Eligibility Criteria:</b> Must have Ameren Illinois electric service to qualify</p> <p><b>BPC12:</b> Existing: Can be a new installation or replacement of any size existing air-cooled chiller                  New: Only single-chiller configurations may be submitted using the measure. Multiple-chiller configurations should use the Custom application                  New equipment must be air-cooled only (no water cooled) and must have efficiency rating better than 10.1 full load EER and 13.7 IPLV EER (or less than 0.876 IPLV expressed as kW/ton)</p> <p><b>BPC26:</b> Existing: Can be a new installation or replacement of any size existing air-cooled chiller                  New: Only single-chiller configurations may be submitted using this measure. Multiple-chiller configurations should use the Custom application                  New equipment must be air-cooled only (no water cooled) and must have efficiency rating better than 10.1 full load EER and 14 IPLV EER (or less than 0.845 IPLV expressed as kW/ton)</p>							
	Measure Code	Description	Actual New Unit Size in Tons	Actual New Unit IPLV Rating	Peak efficiency of New Equipment Expressed as Full Load EER (may be listed as EER on chiller)	Unit Installed (limit of 1)	Incentive	Incentive Requested
	BPC12	Up to 150 tons					\$3,000/unit installed	
	BPC26	150 tons and larger					\$3,000/unit installed	

<b>Demand Controlled Ventilation</b>	Measure Code	Description	Eligibility Criteria for Existing Condition	Eligibility Criteria for New Installation	Number of Sensors Installed	Square Footage of Conditioned Space Controlled by Sensor (A)	Unit Incentive (B)	Total Incentive (A) x (B)
	BPH18	Demand Controlled Ventilation	<ul style="list-style-type: none"> <li>Must be an existing commercial space with no demand control capability</li> <li>The current code minimum for outside air (OA) is 17 CFM per occupant (ASHRAE 62.1) which is the value assumed in this measure</li> <li>Terminal reheat systems may be eligible using the Custom application</li> </ul>	<ul style="list-style-type: none"> <li>New CO2 sensors installed on return air systems where no other sensors were previously installed</li> <li>For heat systems, this measure does not apply to any system with terminal reheat (constant volume or variable air volume)</li> </ul>		_____ sq ft controlled	\$0.15/sq ft controlled	
					<b>Heating Type Variable (choose one)</b>			

# Standard HVAC/Water Heaters Application

## Thermostats

### Eligibility Criteria:

- Must have Ameren Illinois natural gas service to qualify
- Must use natural gas to heat zone controlled by thermostat
- Must be installed in one of the following facility types:
  - Assembly (theater, hall)
  - Convenience store
  - Office, low rise (four or fewer stories)
  - Religious facility
  - Restaurant, fast food
  - Restaurant, full service
  - Retail, strip mall
  - Retail, department store
- Must control a single zone HVAC system; multi-zone systems are not eligible for this measure
- Thermostat must control both a heating unit AND a cooling unit
- Must have intermittent fan operation during unoccupied mode

### BPH17

- Must be replacement of existing non-programmable thermostat requiring manual intervention to adjust setpoints
- New programmable thermostat must have capability to change setpoints without manual intervention
- Must set back both heat and cooling by at least 10° F

### BPH23

- Must be replacement of existing programmable or manually-controlled thermostat
- The initial program schedule must set back both heat and cooling by at least 10° F – may change over time with learning functions
- Install new ENERGY STAR-listed “smart” thermostat (visit <https://www.energystar.gov/productfinder/product/certified-connected-thermostats/results> for full list)
- Installed thermostat must be wi-fi-connected and have any available learning features enabled

Measure Code	Description	Existing Thermostat Type	Setback Temperatures*	Weekly Hours in Occupied Mode*	HVAC Equipment Capacity (total – all units)	Number of Units Installed (A)	Unit Incentive (B)	Total Incentive (A) x (B)
BPH17	Programmable Thermostat	Must be Manual	_____°F cooling setback temp _____°F heating setback temp		_____ Cooling capacity (tons) _____ Heating capacity (kBtuh)		\$100/thermostat	
BPH23	Advanced Thermostat	Existing Thermostat Type	_____°F cooling setback temp _____°F heating setback temp		_____ Cooling capacity (tons) _____ Heating capacity (kBtuh)		\$100/thermostat	
		Manual						
		Programmable						

\*Setback temperatures are the difference in temperature setpoints between occupied and unoccupied periods. For advanced thermostats, setback temperatures and weekly hours in occupied mode refer to the initial programmed setting, even though they may change over time with advanced learning functions built into the thermostat.

# Standard HVAC/Water Heaters Application

<b>PTAC/PTHP Units</b>	<b>Eligibility Criteria:</b> Must have Ameren Illinois electric service to qualify  <b>BPC30:</b> <ul style="list-style-type: none"> <li>Replacing an existing unit</li> <li>Minimum EER rating: 11 OR minimum SEER rating: 12.7</li> <li>All EER values must be rated at 95 degrees outdoor dry-bulb temperature</li> </ul> <b>BPC27:</b> <ul style="list-style-type: none"> <li>New installation</li> <li>Minimum EER rating: 13 OR minimum SEER rating 16.42</li> <li>All EER values must be rated at 95 degrees outdoor dry-bulb temperature</li> </ul>									
	Measure Code	Description	New unit cooling capacity (kBtuh)	New PTHP unit heating capacity (kBtuh)	PTAC or PTHP installed	New unit EER or SEER rating	Actual new unit COP rating for PTHP units	Number of Units installed (A)	Incentive (B)	Incentive Requested (A x B)
	BPC30	PTAC/PTHP less than 65 kBtuh, replacement			PTAC PTHP	EER SEER			\$35/unit installed	
	BPC27	PTAC/PTHP less than 65 kBtuh, new installation			PTAC PTHP	EER SEER			\$25/unit installed	

# Standard HVAC/Water Heaters Application

## VFD on HVAC Motors

**Eligibility Criteria:** Must have Ameren Illinois electric service to qualify

- New installations only
- Must drive a variable load
- Used in conjunction with cooling tower fans or HVAC pumps (see next page, BPC20, for supply or return fans)
- VFDs may be used for the following (other uses may apply under the Standard VFD program or the Custom program): hot water pump, chilled water pump, air foil/inlet guide vanes fan, forward curved fan/discharge dampers, forward curved inlet guide vanes fan, air foil/backwards incline
- May not control motor over 500 hp
- Must be installed on an AC motor (DC motors are not eligible)
- Redundant/backup units do not qualify
- Incentive may not exceed 75% of the project cost
- Installations of new equipment with VFDs which are required by IECC 2015 are not eligible for incentives.

Measure Code	Description	Capacity (total hp) (A)	Incentive (B)	Motor Efficiency	Load Factor	Use	Calculated Incentive (A x B) (C)	VFD Project Cost (D)	75% of Project Cost (D) x 0.75 (E)	Requested Incentive Lesser of (C) & (E)
BPC31	Variable Frequency Drive on HVAC Motors – Cooling Tower Fans or HVAC Pumps		\$115/hp controlled		%*  *Load factor=ratio of actual load to motor's maximum load rating. Enter 65% if unknown.	Hot water pump Chilled water pump Air foil/Inlet guide vanes fan Forward curved fan/discharge dampers Forward curved inlet guide vanes fan Air foil/backwards incline  <i>Other VFD uses may apply under the Custom program</i>				

# Standard HVAC/Water Heaters Application

<b>VFD on HVAC Motors</b>	<b>Eligibility Criteria:</b> Must have Ameren Illinois electric service to qualify <ul style="list-style-type: none"> <li>• New installations only</li> <li>• Must drive a variable load</li> <li>• Used in conjunction with supply or return fans (see previous page, BPC31 for cooling tower fans or HVAC pumps)</li> <li>• Existing use must be: no control or bypass damper; discharge damper; BI and airfoil/outlet damper; inlet damper box; BI and airfoil/inlet guide vanes; inlet vane damper; forward curve/outlet damper; eddy current drive; forward curve/inlet guide vanes</li> <li>• VFDs may be used for the following (other uses may apply under the Standard VFD program or the Custom program): VFD with duct static pressure controls, VFD with low-no static pressure controls</li> <li>• May not control motor over 500 hp</li> <li>• Must be installed on an AC motor (DC motors are not eligible)</li> <li>• Redundant/backup units do not qualify</li> <li>• Incentive may not exceed 75% of the project cost</li> <li>• Installations of new equipment with VFDs which are required by IECC 2015 are not eligible for incentives.</li> </ul>								
	Measure Code	Description	Capacity (total hp) (A)	Incentive (B)	Motor Efficiency	Calculated Incentive (A x B) (C)	VFD Project Cost (D)	75% of Project Cost (D) x 0.75 (E)	Requested Incentive Lesser of (C) & (E)
	BPC20	Variable Frequency Drive on HVAC Motors – Supply or Return Fans		\$115/hp controlled	_____ %				
	<b>Existing Use</b>		No control or bypass damper Discharge damper BI and airfoil/outlet damper	Inlet damper box BI and airfoil/inlet guide vanes Inlet vane damper	Forward curve/outlet damper Eddy current drive Forward curve/inlet guide vanes		<b>New Use</b>	VFD with duct static pressure controls VFD with low/no static pressure controls	

<b>Notched V-belts for HVAC Systems</b>	<b>Eligibility Criteria:</b> Must have Ameren Illinois electric service to qualify <ul style="list-style-type: none"> <li>• Notched V-belt replacing standard smooth fan belt</li> <li>• Must be installed on supply or return air fan</li> <li>• If installing multiple notched V-belts on motors of differing sizes, please attach a table indicating HP, motor efficiency, and load factor for each</li> </ul>							
	Measure Code	Description	HP of Motor	Efficiency of Motor	Motor Load Factor	Quantity of V-belts Installed (A)	Unit Incentive (B)	Total Incentive (A) x (B)
	BPH16	Notched V-belts for HVAC Systems		_____ %	_____ % (Use 80% if unknown)		\$15/belt	



# Standard HVAC/Water Heaters Application

## Gas Boiler Replacement & Controls

**Eligibility Criteria:** Must have Ameren Illinois gas service to qualify

**Gas Boiler (BPH4) :** New natural gas fueled, hot water or steam boiler replacing existing hot water or steam natural gas fueled boiler, or new installation.

**New equipment must be listed on the AHRI website:** <http://www.ahridirectory.org/ahridirectory/pages/home.aspx>.

Boiler must be used for at least 80% space heating (not process).

Hot water boiler 93% minimum efficiency; steam boiler 91% minimum efficiency (AFUE or thermal efficiency (TE)).

**Boiler Controls (BPH9) :** To be installed on an existing boiler without reset controls.

Boiler must be used for at least 80% space heating (not process).

Boiler capacity must be less than 2,000 kBtuh. Boilers greater than or equal to 2,000 kBtuh must use the Custom application.

No manual controls.

Must install reset controls.

Must implement boiler lockout at 55°F or higher outdoor air temperature.

Measure Code	Description	Type	Mfg and Model of New Equipment	Size Range (kBtuh input)	New Unit Size (in kBtuh input)	Actual AFUE or TE of new unit	Quantity (A)	Incentive (B)	Incentive Requested (A x B)	
BPH4	<b>Gas Boiler</b> (Hot water 93% minimum efficiency; steam 91% minimum efficiency) (To apply for incentives for units over 2,000 kBtuh input, use the Custom application)	Existing System: steam hot water boiler new installation		Up to 299		_____ %		\$300		
				300-499		_____ %		\$800		
				500-999		_____ %		\$1,500		
			New System: steam hot water boiler		1,000-1,699		_____ %		\$2,650	
				1,700-1,999		_____ %		\$3,600		
				2,000+				Custom		
Measure Code	Description	Unit Incentive (A)	Boiler Size (kBtuh input) (B)	Calculated Incentive (A x B)	Capped at \$600	Incentive Requested				
BPH9	<b>Boiler Lockout / Reset Controls</b>	\$0.50/kBtuh, up to \$600	_____ kBtuh (2,000+ kBtuh must use the Custom application)							

# Standard HVAC/Water Heaters Application

Gas Furnace Replacement

**Eligibility Criteria:** Must have Ameren Illinois gas service to qualify

**New equipment must be listed on the AHRI website:** <http://www.ahridirectory.org/ahridirectory/pages/home.aspx>

**BPH7:** New natural gas fueled furnace; can be a new installation or replacement of an existing natural gas fueled furnace.  
New equipment must meet minimum 94% AFUE

**BPH8:** Existing furnace must currently be providing sufficient space conditioning and/or total cost of repair to full functionality <\$500.

In order to qualify as early replacement, the Ameren Illinois customer must sign (as defined below) to indicate the existing furnace currently provides sufficient space heating or can be repaired for \$500 or less. If the furnace is in need of repair, a service quote must be included with the application materials clearly indicating the willingness of a contractor to repair the existing furnace to full working order at a price of \$500 or less.

The existing furnace must be removed.

New furnace maximum input 225 kBtuh (MBH).

New furnace must have brushless DC or electrically commutated fan blower motor.

New equipment must meet minimum 94% AFUE.

Measure Code	Description	Type	Mfg and Model of New Equipment	Size Range (kBtuh input)	New Unit Size (in kBtuh [MBH] input)	Actual AFUE of new unit	Quantity (A)	Incentive (B)	Incentive Requested (A x B)
BPH7	High Efficiency Gas Furnace (94% AFUE min)	Furnace blower fan used for A/C? Yes No		40-140		____%		\$250	
		Furnace blower fan used for A/C? Yes No		141-225		____%		\$500	
Measure Code	Description	Type	Mfg and Model of New Equipment	Size Range (kBtuh input)	New Unit Size (in kBtuh [MBH] input)	Actual AFUE of new unit	Quantity (A)	Incentive (B)	Incentive Requested (A x B)
BPH8*	Gas Furnace Early Replacement (94% AFUE min)	Furnace blower fan used for A/C? Yes No		40-140		____%		\$500	
		Furnace blower fan used for A/C? Yes No		141-225		____%		\$1,000	

**\*Gas Furnace Early Replacement (BPH8) Customer Acknowledgement and Signature**

The incentive is a major factor in the replacement of my existing furnace. My existing furnace provides sufficient space heating or can be repaired for \$500 or less.

Print name: \_\_\_\_\_ Title: \_\_\_\_\_

Ameren Illinois customer signature: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

*(This portion of the form must be printed and signed, in person, by the customer. Electronic signatures will not be accepted.)*

# Standard HVAC/Water Heaters Application

<b>Gas Furnace Replacement (Cont.)</b>	<b>Eligibility Criteria:</b> Must have Ameren Illinois gas service to qualify <ul style="list-style-type: none"> <li>• New installation or replacement of existing non-condensing forced air furnace rated 80% efficient or below</li> <li>• New unit must be a condensing forced air furnace rated 90% or higher gas thermal efficiency (TE)</li> <li>• New equipment must be listed on the AHRI website: <a href="http://www.ahridirectory.org/ahridirectory/pages/home.aspx">http://www.ahridirectory.org/ahridirectory/pages/home.aspx</a></li> </ul>							
	Measure Code	Description	Facility Operating Hours (choose one)	Quantity Installed	New Unit Thermal Efficiency (TE)	New Unit Size in kBtuh (A)	Unit Incentive (B)	Total Incentive (A) x (B)
	BPH20	Unitary HVAC Condensing Furnace	24 hr/7 days 19 hr/7 days 14 hr/7 days 14 hr/5 days		_____%  Manufacturer and Model of New Unit		\$3/kBtuh	

<b>Multifamily Facility Hot Water</b>	<b>Eligibility Criteria:</b> Must have Ameren Illinois gas service to qualify					
	Measure Code	Description	Eligibility Criteria	Number of Multifamily Units Served (A)	Unit Incentive (B)	Total Incentive (A) x (B)
	BPWH7	Controls for Multifamily Central Domestic Hot Water Plants	<ul style="list-style-type: none"> <li>• New installation or replacement of uncontrolled recirculation pumps on existing demand hot water system</li> <li>• Recirculating pump shall cycle based on:                             <ul style="list-style-type: none"> <li>○ Recirculation loop return water dropping below a prescribed temperature (e.g. 100°F)</li> <li>○ CDHW demand is sensed as water flow through the CDHW system</li> </ul> </li> </ul>		\$50/living unit served	

# Standard HVAC/Water Heaters Application

## Commercial Water Heaters

**Eligibility Criteria:**

New equipment must be listed on the AHRI website: <http://www.ahridirectory.org/ahridirectory/pages/home.aspx> (note that tankless models may be in the residential section)

**BPWH4:** Replace gas commercial-grade tanked water heater having 50 or more gallon storage capacity with a new gas water heater of the same capacity

- Existing unit must have input greater than or equal to 75 MBTUH
- The new unit must have thermal efficiency greater than or equal to 90% and equivalent storage capacity to unit being replaced

**BPWH5:** May be new installation or replacement of gas tanked water heater with a new gas water heater having 50 or more gallon storage capacity

- New unit must have input greater than or equal to 75 MBTUH
- New equipment thermal efficiency must be greater than or equal to 88%

**BPWH2:** May be new installation or replacement of existing electric commercial-grade water heater having 50 or more gallon storage capacity and input wattage between 12 and 54 kW with a new electric water heater of the same capacity. Existing unit must have energy factor less than or equal to 0.90, or water heater is five or more years old.

- New unit must have energy factor of  $\geq 0.98$  with greater than 5GPM output and a 70°F temperature rise
- Multiple new units may be installed to meet the demands supplied by the existing tanked unit

Measure Code	Description	Capacity of existing water heater	Existing Quantity of Units	Capacity of new water heater	Quantity of Units (A)	kBtuh Input	Efficiency rating of new Unit(s)	Unit Incentive (B)	Incentive Requested (A x B)
BPWH4	High Efficiency Condensing Tanked Water Heater (Gas)	50-79 gal		50-79 gal		Existing Unit(s)	Energy Factor*	\$300/heater	
		80-99 gal		80-99 gal			%		
		100+ gal		100+ gal			Thermal Efficiency*		
BPWH5	High Efficiency Tanked Water Heater (Gas)							\$150/heater	
BPWH2	High Efficiency Tankless Water Heater (Electric)			5-9.99 GPM		Actual GPM Input		\$500/heater	
				10-14.99 GPM					
				15+ GPM					

\*If both ratings are not available, please provide at least one. Call 1.866.800.0747 if you need assistance.

**Total Incentive**

# Standard HVAC/Water Heaters 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) **"Competitive Large Incentive Project"** shall mean incentives applied for by submitting the Competitive Large Incentive Project Application. Those applications will go through a competitive bidding process to determine which projects will be awarded incentives.
- e) **"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.
- f) **"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.
- g) **"EEM"** shall mean energy efficiency measures.
- h) **"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.
- i) **"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.
- j) **"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.
- k) **"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.
- l) **"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.
- m) **"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 (ActOnEnergy.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 (June 1 through May 31), for a facility) are defined as follows:

- Standard, Custom, and Retro-Commissioning applications: Electric incentives are capped at \$500,000 per project. Gas incentives are capped at \$250,000 per project.
- Caps for incentives awarded under the Competitive Large Incentive Project (CLIP), are specified in the Competitive Large Incentive Project Application.
- 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.
- New Construction Lighting incentives are capped at \$100,000.
- Feasibility Study – the maximum incentive payment for a single Feasibility Study is capped at \$20,000. See the Feasibility Study application for further details.
- 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.
- 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. 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 (Rev10)

# Standard HVAC/Water Heaters Application

## Required Documentation Checklists

### All Applications

Before submitting your application, please be sure to include all required information and documents as listed below.

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

Ensure that all qualifying equipment is entered in the Incentive Calculation Section (pp. 3-11)

For Equipment incentives: 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.*

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

Signed W-9 form with Tax Identification Number associated with the incentive payee. **Incentives WILL NOT be paid until a completed and signed [W-9](#) has been received.**

### Applications Under \$10,000

Standard applications requesting less than \$10,000 in incentives do not require pre-approval and should submit a signed Incentive Request Form along with the required documentation above to receive payment.

### 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 [www.ActOnEnergy.com/Forms](http://www.ActOnEnergy.com/Forms).

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

[Payment Release Authorization](http://www.actonenergy.com/portals/0/business/forms/payment-release-authorization.pdf) (<http://www.actonenergy.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.

[Large Incentive Request Form](http://www.actonenergy.com/portals/0/business/forms/large-incentive-request-form.pdf) (<http://www.actonenergy.com/portals/0/business/forms/large-incentive-request-form.pdf>) is required if the total requested incentive is over \$25,000.

## 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. 13) listed above. **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) \_\_\_\_\_

Total Incentive \_\_\_\_\_

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.*

# Standard HVAC/Water Heaters Application

## Incentive Payment Request Form

This form and required documentation should 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.)
- W-9 submitted?

#### FOR PROJECTS THAT DID NOT RECEIVE PRE-APPROVAL

All items required for ALL PROJECTS above, AND THE FOLLOWING:

- Customer and Project Information Section completed?
- Incentive Calculation Section completed?
- For Equipment incentives: Cut sheets with technical requirements circled?
- Signed by the Ameren Illinois customer?

### 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. 13) 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 operational and installed (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 Programs.*

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

# Standard HVAC/Water Heaters 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 [ActOnEnergyProjects@Ameren.com](mailto:ActOnEnergyProjects@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 a "zip" file.

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.