

Government Support Portal – Those municipal, township, or county authorities who are aggregators, actively bill a municipal utility tax, or are considering a municipal utility tax can use this self-service web portal to obtain jurisdictional premises information and load data. In addition, State Government authorities whose responsibility includes reporting eligible State tax exemptions and/or verifying the status of customers currently listed with Gas Energy Efficiency Rider (GER) exemptions are able to access this web program to electronically notify effective and termination dates of the applicable exemption(s). Ameren Illinois calls these groups Government Entities (GE).

The five levels of access built into the web portal are described below:

- 1. <u>Government Site Administrator</u> This is a state, municipal, township, or county employee who completes and maintains registration and has <u>full</u> access to the portal. It is the Government Administrator's responsibility to set up additional program administrators, program non-administrator users, and program view only users for access to reports provided by each program.
- 2. <u>Program Administrator</u> This is a state, municipal, township, or county employee who completes and maintains registration and has <u>full</u> access to a specific program in the portal. It is the Program Administrator's responsibility to set up additional program non-administrator users and program view only users for access to reports provided by each program.
- 3. <u>Program Non-Administrator / Consultant</u> This can be multiple employees, agents, or a consultant with the GE who has access to view the government dashboard and request, view, and maintain reports.
- 4. <u>Program View Only</u> This can be multiple employees, agents, or a consultant with the GE who has access to view the government dashboard and view reports.
- 5. **No Program Level Role** This can be applied to any user with multiple service role access and will eliminate the ability for that user to view/edit anything within that selected service.



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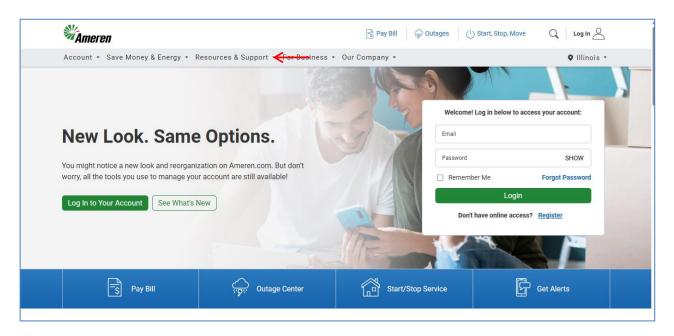
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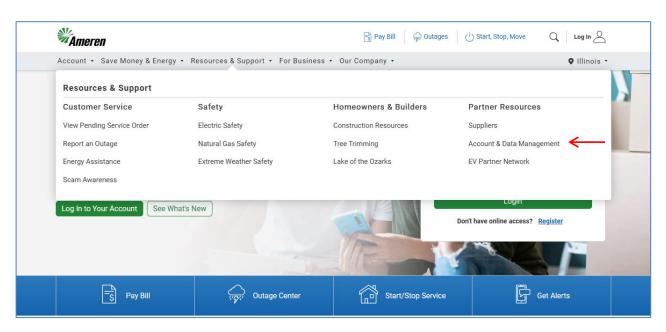
#### **Government Support Portal**

To gain access to the Government Support Portal

- Go to the Ameren website at www.Ameren.com
- Select "Resources & Support"

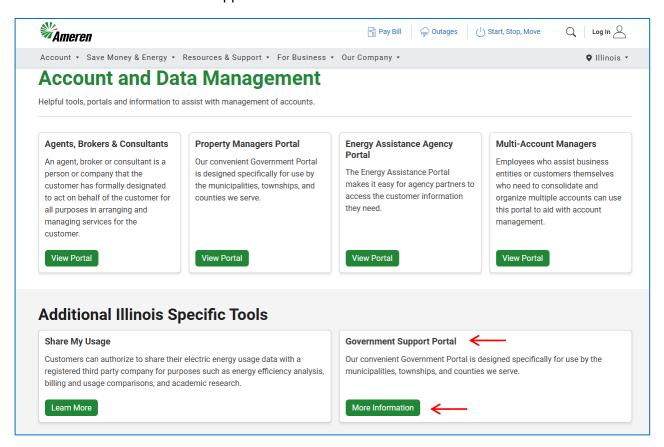


Select "Account & Data Management"



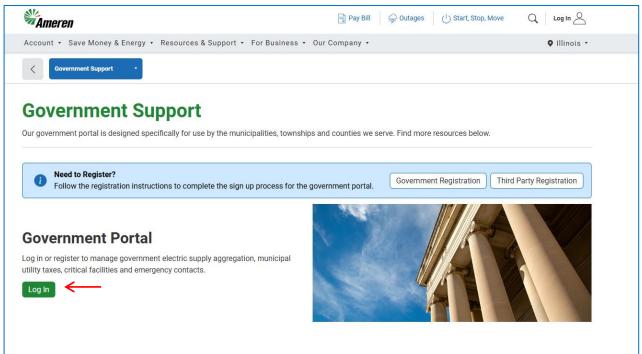


• Go down to Government Support Portal and select "More Information".

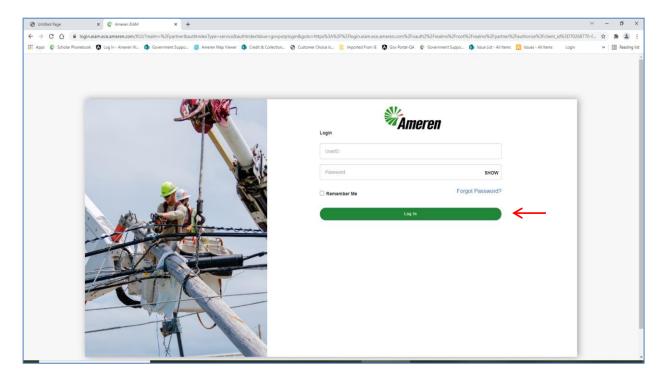


• Select "Log In"





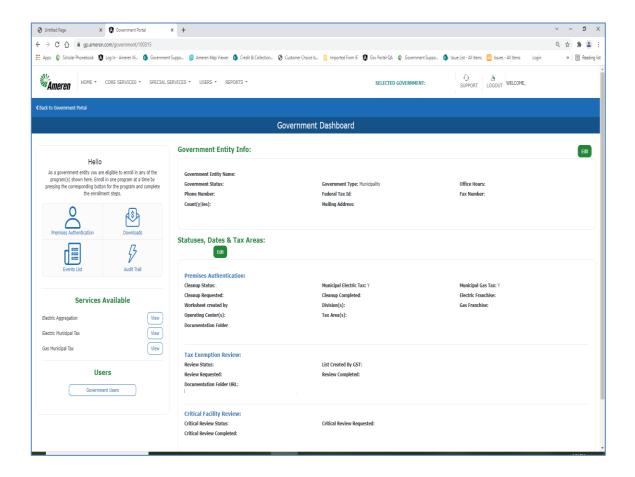
Enter your email address used during registration and the permanent password that was set after registration. Select "Log In".





#### **Government Dashboard**

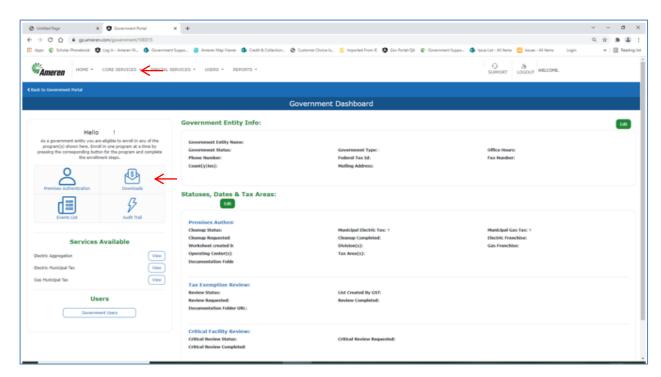
"Government Dashboard", contains GE specific data that can be edited by the Government Site Administrator and where services are accessed or added. This window will list all services available based on the Government Type selected during initial registration.



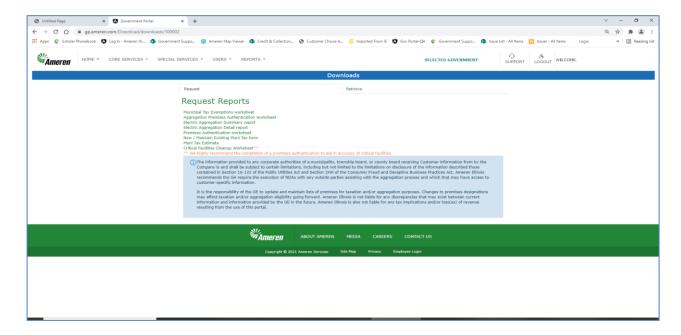
#### **Downloads**

To access select either the "Downloads" from the quick side menu <u>or</u> the "Downloads" option under the Core Services menu, at the top of the page.





To request a new report please make sure you are on the "Request" sub-window and then click the appropriate report name. If reports were previously requested you will need to select "Retrieve". If a Government Entity is registered for multiple programs, reports provided are dependent on the access rights of the user logged in. In the example below, the Government Administrator is logged in therefore all service reports are listed.





<u>Municipalities</u> will not have the ability to request a Muni Tax Estimate or New/Maintain Existing Muni Tax form until premises authentication is complete.

<u>Townships</u> will not have the ability to request a preliminary Summary report or Detail report until premises authentication is complete.

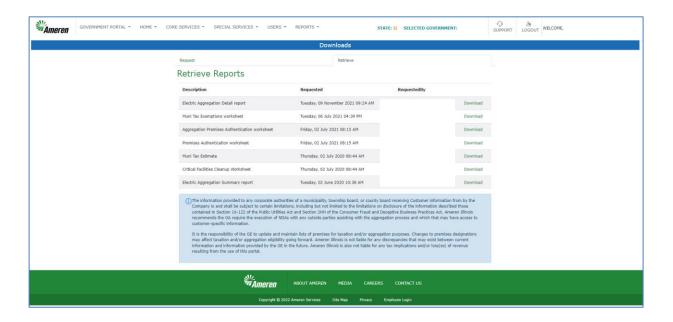
<u>Counties and Townships</u> will not have the ability to request a Muni Tax Estimate or New/Maintain Existing Muni Tax form.

Reports that could be available on the Retrieve tab depending on the Services that have been signed up for:

- (Aggregation or Muni Tax) Premises Authentication Worksheet Once this report is retrieved it must be reviewed and completed by the GE and Ameren Illinois before the GE can request a new premises authentication report.
- Summary Report The first time the summary report is pulled, (assuming it is pulled at the same time as the premises authentication report), the data will reflect the premises prior to premises authentication. A revised summary report can be requested the Monday after receipt of the completion email for premises authentication.
- <u>Detail Report</u> Prior to completion of the premises authentication report and receipt
  of ordinance (opt-in) or certified referendum results (opt-out), the detailed report *will*not include the customer account numbers.
- Muni Tax Estimate Once the premises authentication report is reviewed and completed, this report will become available to begin the estimate process of establishing a municipal utility tax.
- Municipal Tax Exemptions Report Once the premises authentication report is reviewed and completed, this report will provide information related to those customers who are exemption from the Municipal's Utility Tax.
- New / Maintain Existing Muni Tax This form is available after the completion of premises authentication and is for municipalities who are looking to implement or modify an existing municipal utility tax. Once the form is completed you can either fax or mail it into Ameren Illinois' Tax Department.

The requested report will automatically move to the "Retrieve" window. If it doesn't then refresh your browser screen (F5) or go back to your Dashboard and back to the Downloads screen. To view the report(s), select the "Download" link. The report(s) can then get exported to an Excel document.





#### **Municipal Utility Tax Exemption Review**

Municipal Tax Exemption worksheet can only be requested if a Premises Authentication has been completed within the last 12 months. After Premises Authentication is complete and the user has requested and downloaded the Muni Tax Exemptions worksheet, they will need to access the Municipal Tax Exemptions window to complete the review process.

The Municipal Utility Tax Ordinance must have verbiage that applies to any/all accounts listed on the Muni Tax Exemptions worksheet. If the accounts are not defined in the ordinance the Municipality has two options.

- Amend the current ordinance verbiage to include the accounts
- 2. Remove all Exemptions

To access this window, click on Special Services from the top menu bar and then select Municipal Tax Exemptions.

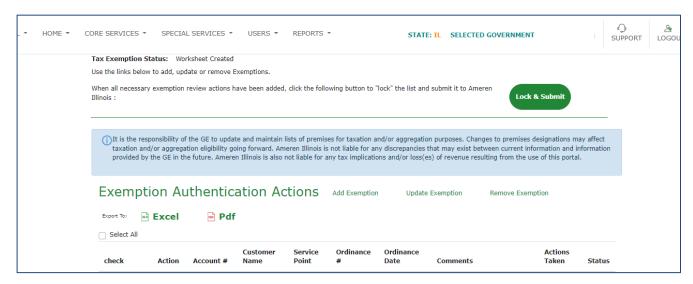




#### Municipal Tax Exemption Guide

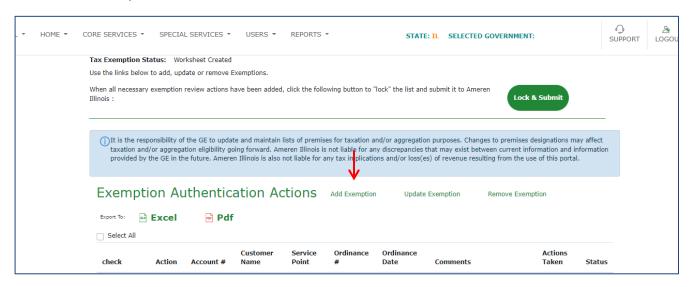
#### **Government Portal**

If the Municipal Tax Exemption List is accurate and requires no revisions select "No Modifications Needed". A message will appear confirming the status of the premises authentication and notify the Government Support Team.



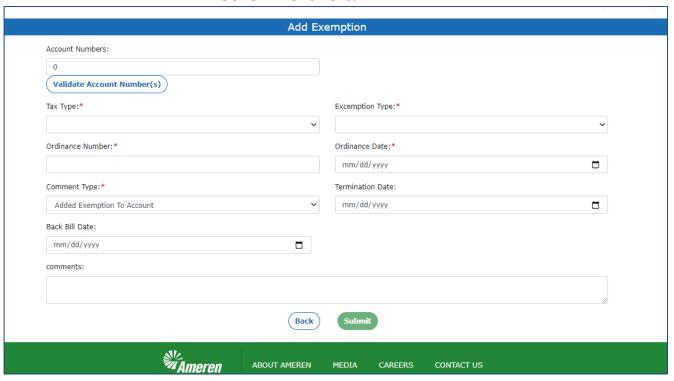
#### **Add an Exemption**

"Add Exemption" allows the user to add accounts to the Muni Tax Exemptions worksheet. Select "Add Exemption".



The following window will populate. Enter and validate the Account Number of the account you are wanting to add to your exemption list and then fill out all required fields indicated with an asterisk. Select "Submit".





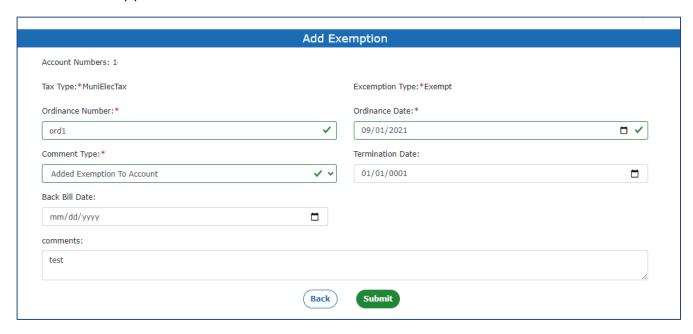
The following is a list of options for the Tax Type and Exemption Type that you will use:

- Tax Type
  - Muni Gas Tax
  - Muni Elec Tax
  - Muni Gas Use Tax
  - Muni Gas Trans Tax
  - Muni Elec Maintenance fee
- Exemption Type
  - Exempt
  - Federal Government
  - Other Government

For the purpose of training, we will add an electric exemption. Enter and validate the account number and then select the Tax Type and Exemption Type fields.

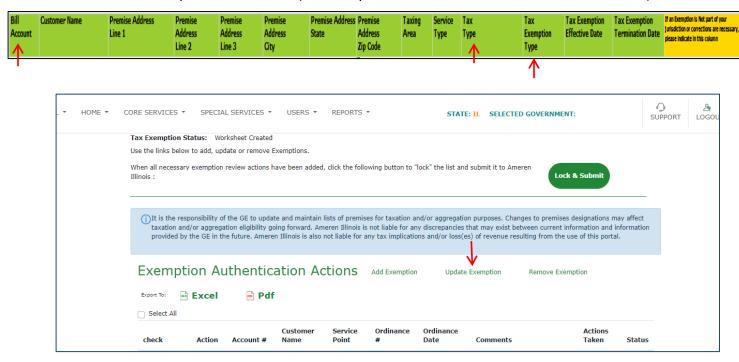


Enter the Ordinance number, date, and comments supporting the action taken for the account number(s) and select "Submit".



#### **Update an Exemption**

"Update Exemption" requires the account number, tax type, and exemption type provided on the Muni Tax Exemption worksheet. (An example of the worksheet header is shown below)

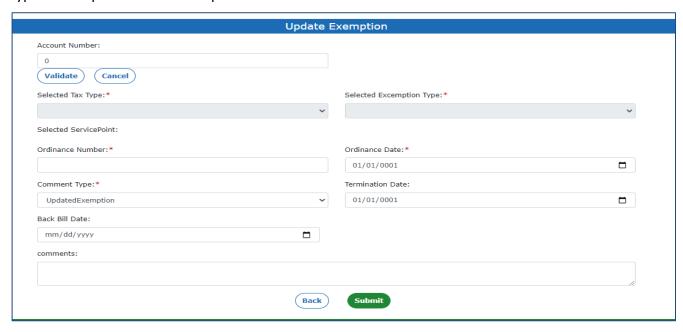




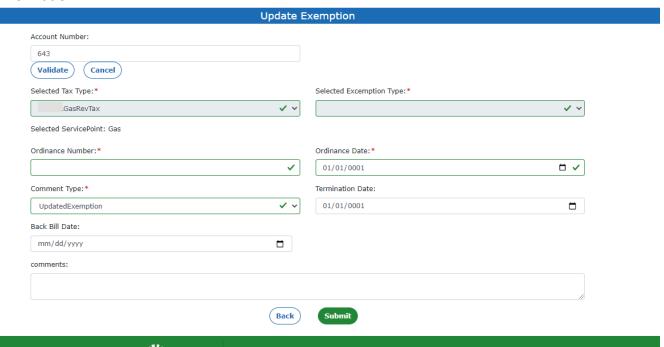
#### Municipal Tax Exemption Guide

#### **Government Portal**

The account number allows the Government Portal to locate the tax type and tax exemption type and helps ensure that we perform maintenance on the correct account.



Users must enter and validate the account number before they can enter any further information.

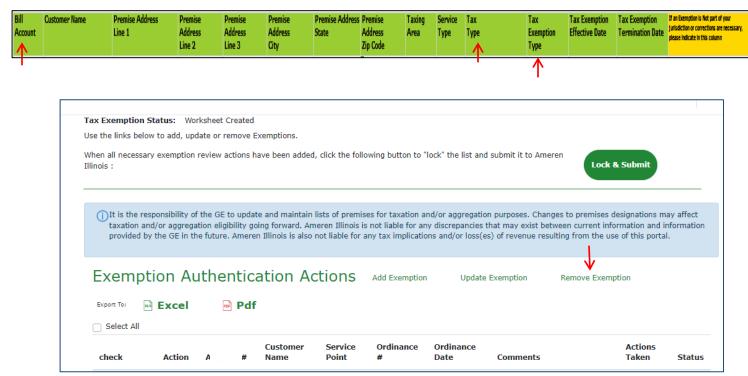


Enter the updated information (i.e. - Ordinance number and date), an explanation in the comments, and select "Submit".

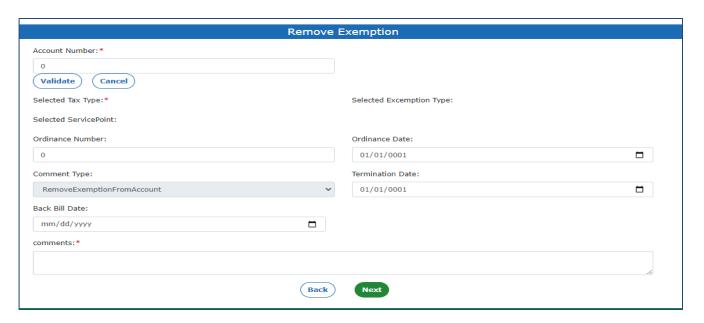


#### **Remove an Exemption**

"Remove Exemption" also requires the account number provided on the Muni Tax Exemption worksheet. (An example of the worksheet header is shown below)

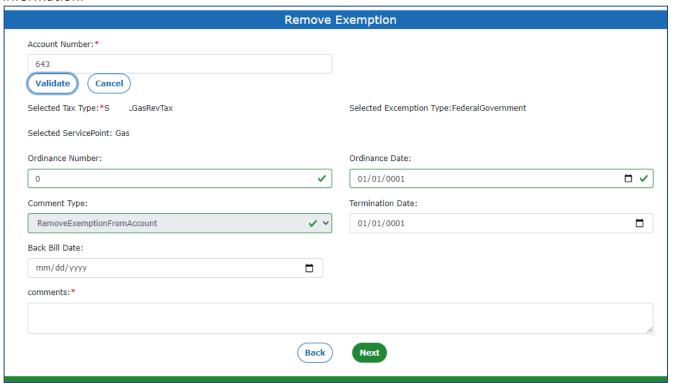


The account number allows the Government Portal to locate the tax type and tax exemption type and helps ensure that we perform maintenance on the correct account.





Users must enter and validate the account number before they can enter any further information.



Enter an explanation of actions requested in the comments and select "Next".



#### **Lock and Submit Municipal Tax Exemption**

Once the Municipal Tax Exemption worksheet has been thoroughly reviewed and accounts have been removed, updated, or added select "Lock and Submit". The first message users will receive is a verification of the action, select "Yes" as long as you are ready to submit the modifications. The final message will appear notifying the Government Support Team (GST) of the submission.









#### **Government Review of completed Municipal Tax Exemption**

Once Ameren Illinois has completed the edits, the GE will receive an email advising that they should log into the portal to review and approve or decline the modifications completed by Ameren Illinois.

Ameren Illinois has completed its internal review of the Tax Exemptions List that you provided and revised the list to accurately reflect the customers in your area.

Please log in to the portal to review the revised Tax Exemption List and approve all requested changes. In addition, if you haven't already done so, please provide a true and correct copy of the referendum and certified results of the completed referendum, and/or ordinance authorizing aggregation, as applicable.



THIS MESSAGE WAS SENT FROM THE AMEREN ILLINOIS GOVERNMENT PORTAL

Our website address is <a href="http://sc.uat.ameren.com/illinois/government-support/aggregation">http://sc.uat.ameren.com/illinois/government-support/aggregation</a>

THANK YOU FOR USING THE PORTAL

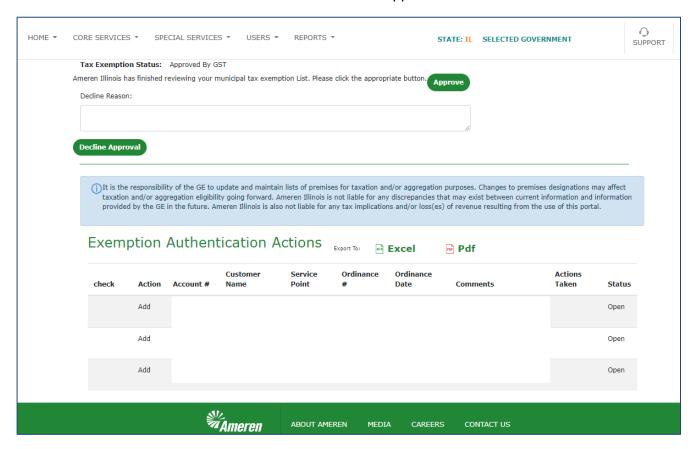
If you have any questions, please email <a href="mailto:GovernmentSupportTeam@AmerenIllinois.com">GovernmentSupportTeam@AmerenIllinois.com</a>.

Ameren Illinois will never contact you by email asking you to validate your password. If you receive such a request, please notify us.

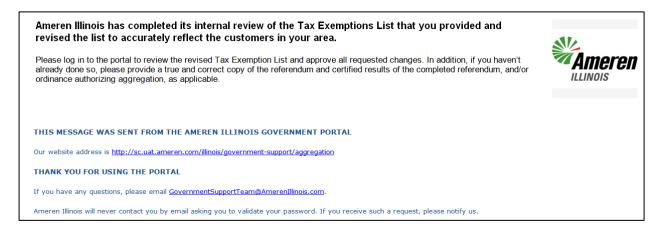


#### **Decline Modifications**

After the user has reviewed and they disagree with Ameren Illinois' modifications, enter comments in the decline reason box and select "Decline Approval".



This will automatically notify GST that further review and modifications are required. Once Ameren Illinois completes the additional review and/or modifications the GE will receive another email advising to log into the portal, review and approve or decline the modifications completed by Ameren Illinois.

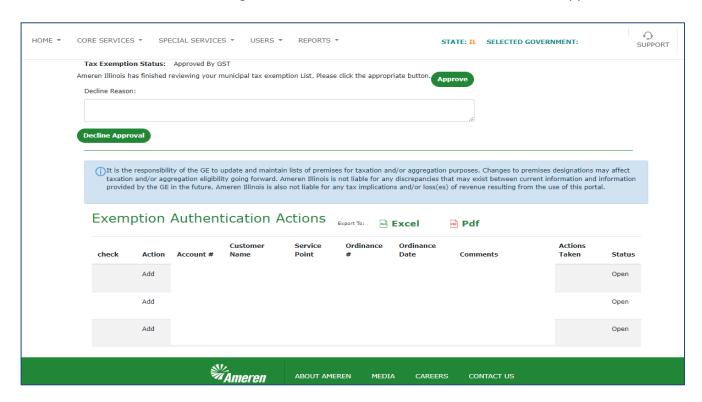




If the GE agrees with the additional modifications, continue with the instructions below to approve.

#### **Approve Modifications**

After the user has reviewed and agrees with Ameren Illinois' modifications, select "Approve".



This will automatically notify GST to change the Municipal Tax Exemption status to "Exemption Review Complete". The GE will receive an email advising the premises authentication is complete.

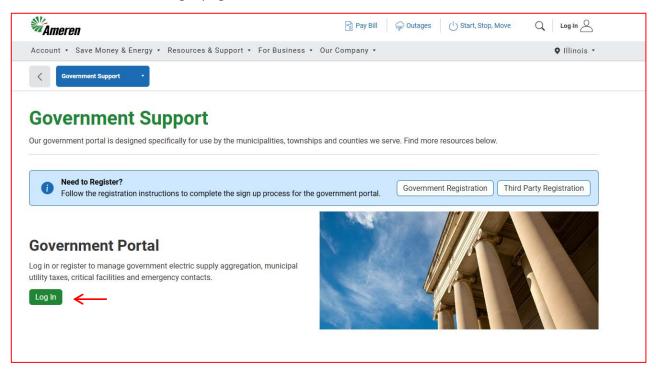




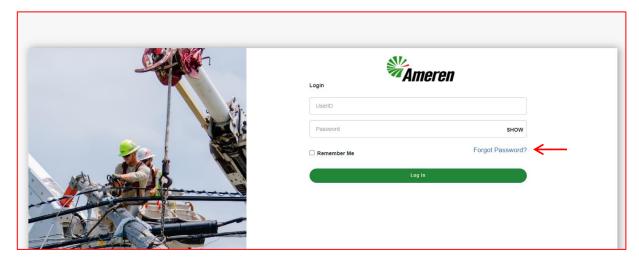
#### **Appendix**

#### **Forgot Password**

Once you have selected the Government Support page (steps begin on page 3), users can select the Government Portal Login page.

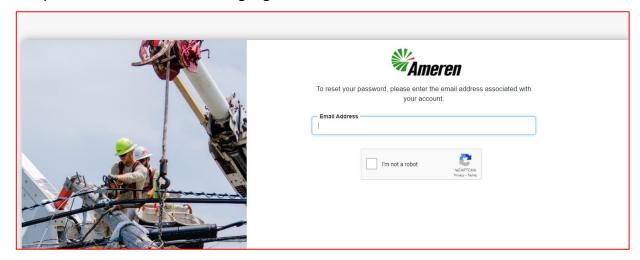


#### Select the "Forgot Password?"

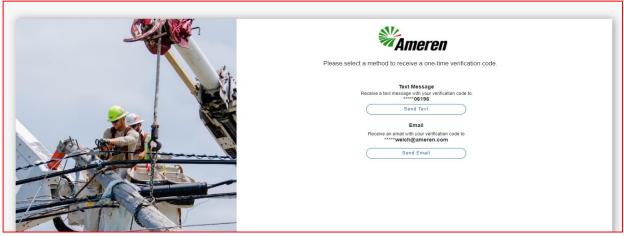




Enter your email address used during registration and select "I'm not a robot".



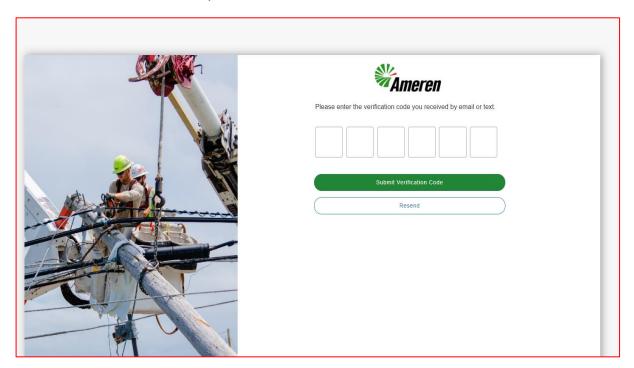
As long as the address is valid, the following page will display.



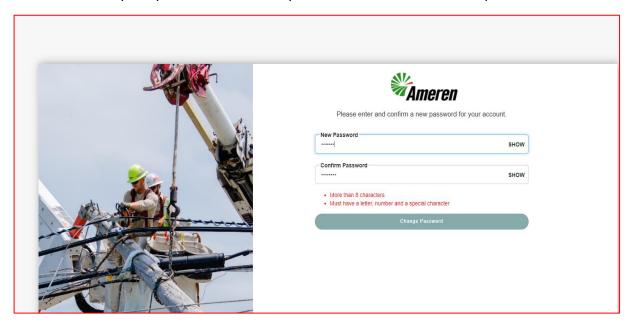
You will need to select to have either a code sent to you via text or email.



Enter the code that is sent to you and select "Submit Verification Code."



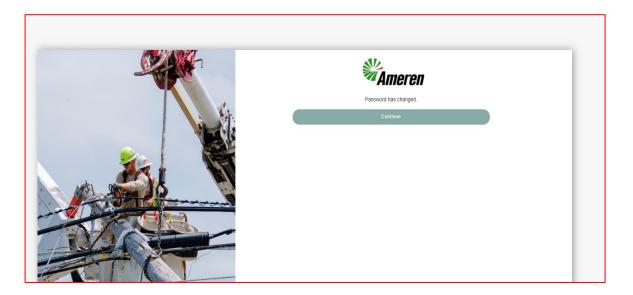
You will then be prompted to enter a new password and to confirm that password.



**Your password is case sensitive.** Follow the guidelines provided and set a new password. Select "Change Password".



You should receive the screen below and select "Continue".





#### **Glossary**

<u>Detail Report</u> – Prior to completion of the premises authentication and receipt of ordinance (optin) or certified referendum results (opt-out), the detailed report **will not** include the customer account numbers.

<u>Government Aggregation</u> – Corporate authorities of a municipality, township, and county board of a county who may aggregate residential and small commercial retail customers.

<u>Government Site Administrator</u> – This is a municipal, township, or county employee who completes and maintains registration and has <u>full</u> access to the portal. It is the Government Administrator's responsibility to set up additional program administrators, program non-administrator users, and program view only users for access to reports provided by each program.

<u>Municipal Utility Tax</u> – Ameren Illinois will work with the municipality to make an additional charge (tax) to its customers receiving service in municipalities pursuant to 65 ILCS 5/8-11-2.

<u>Muni Tax Estimate</u> – Once the premises authentication report is reviewed and completed, this report will become available to begin the estimate process of establishing a municipal utility tax.

<u>New / Maintain Existing Muni Tax</u> – This form is for municipalities who are looking to implement or modify an existing municipal utility tax. Once the form is completed you can either fax or mail it into Ameren Illinois' Tax Department.

**No Program Level Role** – This can be applied to any user with multiple service role access and will eliminate the ability for that user to view/edit anything within that selected service.

<u>Premises Authentication Report</u> – Once this report is retrieved it must be reviewed and updated by the GE and Ameren Illinois before the GE can request a new premises authentication report.

<u>Program Administrator</u> — This is a municipal, township, or county employee who completes and maintains registration and has <u>full</u> access to a specific program in the portal. It is the Program Administrator's responsibility to set up additional program administrators, program non-administrator users, and program view only users for access to reports provided by each program.

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<u>Program View Only</u> – This can be multiple employees, agents, or a consultant with the GE who has access to view the government dashboard and view reports.

<u>Summary Report</u> – The first time the summary report is pulled, (assuming it is pulled at the same time as the premises authentication report), the data will reflect the premises prior to premises authentication. A revised summary report can be requested the Monday after receipt of the completion email for premises authentication.



**Staffing Hours:** 

#### Municipal Tax Exemption Guide Government Portal

<u>Tax Exemption</u> – This is the exclusion of a utility tax to an active customer's account. To allow a customer tax exemption status proper documentation (i.e. – ordinance) must be on file with the utility.

#### **Contact Information**

Monday – Friday 7:00 am – 4:00 pm	
Send your general inquires to us by email.	
Email:	
GovernmentSupportTeam@amerenillinois.com	
Phone:	
217.424.6968	
Fax:	
217.424.6964	