

# Contractor Enrollment Process and Requirements

The following outlines the contractor enrollment process and participation requirements for Ameren Missouri's Energy Efficiency Pay As You Save (PAYS) and Single Family Income Eligible programs.

| PAYS Whole Home                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
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| <b>Contractor Enrollment Process</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <p>PAYS Whole Home is a rolling (yearlong) open enrollment. Contractors complete an online interest form, and the details are provided to EEtility who schedules orientation and training. EEtility is the program implementation contractor for the program.</p> <p>To become a participating Whole Home contractor, a contractor must:</p> <ul style="list-style-type: none"><li>• Attend orientation</li><li>• Provide administrative contact information to fill out onboarding form to begin company profile and portal user log-ins.</li><li>• Read the Trade Ally Manual(s) and sign all appropriate Trade Ally Agreements. Provide certificates of insurance, W9, and a list of zip codes served.</li></ul> <p>For weatherization contractors:</p> <ul style="list-style-type: none"><li>• A member of the staff must have an Infiltration &amp; Duct Leakage Building Performance Institute Certificate or equivalent.</li><li>• Attend training on customer management database</li><li>• Attend training on photo requirements</li><li>• Attend training on workmanship &amp; installation standards</li><li>• Attend training on job completion requirements</li></ul> <p>For HVAC contractors:</p> <ul style="list-style-type: none"><li>• Attend training on customer management database</li><li>• Attend training on HVAC quote process</li><li>• Attend training on photo requirements</li><li>• Attend training on workmanship &amp; installation standards</li><li>• Attend training on job completion requirements</li></ul>                 |
| <b>Disqualification Process</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <p>Contractors found to be in violation of the PAYS Contractor Agreement are subject to the disqualification process outlined below:</p> <p>Step 1: Written Notice of Non-Compliance (Corrective Action Required)</p> <ul style="list-style-type: none"><li>• Description of the non-compliance (policy, contract, QA/QC, safety, documentation, customer complaint, etc.)</li><li>• Reference to the specific program rule, contract term, or requirement violated</li><li>• Date(s) and evidence supporting the finding (inspection results, file review, complaints, missing documents)</li><li>• Required corrective action(s)</li><li>• Deadline for correction</li><li>• Consequences of failure to correct (progression to suspension or removal)</li></ul> <p>Step 2: Final Warning and Program Suspension (Escalated Corrective Action)</p> <ul style="list-style-type: none"><li>• Failure to resolve Step 1 issues</li><li>• Repeated violations of the same requirement</li><li>• Material violations impacting customer safety, program integrity, or regulatory compliance</li></ul> <p>Step 3: Formal Disqualification and Program Removal</p> <ul style="list-style-type: none"><li>• Summary of the full compliance history</li><li>• Dates and copies of prior notices and warnings</li><li>• Final determination and effective date of disqualification</li><li>• Scope of removal (program-specific or enterprise-wide, if applicable)</li><li>• Re-eligibility conditions (if allowed) or statement of permanent disqualification</li></ul> |

## **PAYS FastTrack**

### **Contractor Enrollment Process**

PAYS FastTrack is a rolling (yearlong) open enrollment.

Orientation sessions are listed on Ameren's contractor webpage and can be booked on a first-come, first-serve basis.

To become a participating FastTrack contractor, a contractor must:

- Attend orientation.
- Provide administrative contact information to receive a login to the FastTrack portal.
- In the FastTrack portal, read and sign the Contractor Agreement, including all exhibits and upload required documents: certificate of insurance, license, W9 and provide a list of zip codes served.
- Complete FastTrack program app training.
  - All intended users of the tool, such as sales technicians, must attend this training

### **Disqualification Process**

Contractors found to be in violation of the PAYS Contractor Agreement are subject to the disqualification process outlined below:

#### **Step 1: Written Notice of Non-Compliance (Corrective Action Required)**

- Description of the non-compliance (policy, contract, QA/QC, safety, documentation, customer complaint, etc.)
- Reference to the specific program rule, contract term, or requirement violated
- Date(s) and evidence supporting the finding (inspection results, file review, complaints, missing documents)
- Required corrective action(s)
- Deadline for correction
- Consequences of failure to correct (progression to suspension or removal)

#### **Step 2: Final Warning and Program Suspension (Escalated Corrective Action)**

- Failure to resolve Step 1 issues
- Repeated violations of the same requirement
- Material violations impacting customer safety, program integrity, or regulatory compliance

#### **Step 3: Formal Disqualification and Program Removal**

- Summary of the full compliance history
- Dates and copies of prior notices and warnings
- Final determination and effective date of disqualification
- Scope of removal (program-specific or enterprise-wide, if applicable)
- Re-eligibility conditions (if allowed) or statement of permanent disqualification

## Single Family Income Eligible

### Contractor Enrollment Process

Contractors interested in participating in the program may express interest at any time during the year by submitting their information through the CommunitySavers program webpage. Beginning October 1, the program will contact interested contractors to initiate the participation process for the subsequent calendar year.

Requirements for Contractors to participate:

- Contractor will review and submit RFP packet with provided documents:
  - maximum measure rebates (as filed)
  - Insurance requirements
  - Equipment requirements (HVAC and DI)
- Applications will be evaluated through:
  - Initial review of submitted materials
  - Interview
  - Scoring based on the following criteria:
    - Ability to meet program customer service, safety, and training requirements outlined in the Statement of Work
    - Capacity to meet program demand, including seasonal workload increases
    - Agreement to fixed pricing established for each Program Year
    - Willingness to sign the annual Statement of Work
    - Ability to serve a defined Ameren Missouri service area
    - Maintenance of required insurance coverage
    - Demonstrated commitment to strong customer service
    - Alignment with the number of contractors the Program can support within the available program budget
- Contractors selected for participation will be notified and required to complete the following onboarding steps:
  - Review and sign the Statement of Work (SOW)
  - Complete program training with Implementor
  - Participate in supervised fieldwork with Implementor

### Disqualification Process

Applications are reviewed for completeness, qualifications, and alignment with program requirements. Contractors may be disqualified at any point during review or onboarding if requirements are not met. All communications related to application status, follow-up requests, and disqualification will be conducted via email.

- Incomplete or late submissions may be rejected without further consideration. Contractors that do not demonstrate required qualifications, capacity, or ability to meet program requirements will not advance.
- Information provided by contractors may be verified through interviews, site visits, or reference checks. Contractors may be disqualified if information cannot be validated or if they are determined to be incompatible with program requirements.
- Contractors must agree to program terms, including fixed pricing and execution of the annual Statement of Work. Failure to agree to these terms will result in disqualification.
- Final participation is contingent upon successful completion of onboarding requirements, including training and supervised fieldwork. Contractors who do not successfully complete onboarding may be removed from the Program.