



Austin Utilities Partnering in Energy Solutions Program

Customer Billing Payment Approval Guidelines

If customer qualifies, Austin Utilities will put the project cost on the customer's Austin Utilities bill and pay the ESP.

- Requirements for putting on the customer's bill:
 - Follow Austin Utilities Financing Plan.
 - Need signed "Customer Billing Payment Option Memo of Understanding".
 - Allows Austin Utilities to investigate customer's credit history
 - Copy of the project proposal/cost benefit analysis
 - Project's final invoice; no in-process billing
 - Project's completed rebate application(s) with final invoice(s)
 - Approved "Customer Billing Payment Approval Form" (AU in-house document).
 - 2 year payment history as an Austin Utilities customer
 - Acceptable Austin Utilities credit history review
 - If needed, a credit report at customer's expense
 - Projects will be financed up to \$25,000 per technology. Total projects can not exceed the \$500,000 cap per year.
 - The rebate amount will be paid directly to the customer, either by check or bill credit, which is to be used to make a final payment to the Energy Solutions Partner. The remaining balance will be spread out over an agreed upon timeframe not to exceed 24 months.
 - Balances under \$5,000 limited to 12 months
 - Austin Utilities administrative fee \$300
 - Balances over \$5,000 not to exceed 24 months
 - Austin Utilities administrative fee \$500



Austin Utilities Partnering in Energy Solutions Program

Customer Billing Payment Option Memo of Understanding

Customer Name: _____

Contact Name: _____

Address: _____

E-mail: _____

Customer Account #: _____ Phone #: _____

Energy Solutions Partner: _____

Customer Billing Payment Option

Austin Utilities' Partnering in Energy Solutions Program allows for a significant portion of the cost of the customer's project to be placed directly on their energy bill. To qualify for this financing, please complete the following.

Provide a brief description of the energy conservation project:

- A. Project's total cost (Completed detailed estimate or invoice attached): \$ _____
- B. Payment by Customer directly to ESP \$ _____
- C. Project's estimated rebate (Completed rebate application attached): \$ _____
- D. Project's requested financing amount (Line **A** minus Line **B** or **Maximum of \$25,000**): \$ _____

The customer agrees to:

- Allow Austin Utilities to investigate your credit history
- Pay for a credit report, if required
- Pay the proper administration fee (**fee is required with the submission of this form**)

Project's Requested Financing Amount	Maximum Length Payment Term (Months)	Administration Fee	Interest Rate
\$5,000 or less	12	\$300	0%
\$5001 to \$25,000	24	\$500	0%

Upon completion of the customer billing payment option approval process, Austin Utilities agrees to:

- Pay the project's actual rebates directly to you, the customer, for you to make your final payment to our Energy Solutions Partner (rebate application must be completed by the Energy Solutions Partner)
- Pay the Energy Solutions Partner for the project's total cost minus project's actual rebates (not to exceed \$25,000, copy of the project's customer invoice must be attached)
- **Hold the requested financing funds for a MAXIMUM of sixty days (project is expected to be completed within sixty days of the customer billing payment option approval by Austin Utilities)**

The customer has carefully reviewed the above customer billing payment option. The 1) respective administrative fee, 2) completed estimated rebate application, and 3) estimated project cost invoice are required with submission of this form. Austin Utilities will notify the customer and the Energy Solutions Partner when the customer billing payment option approval process is completed. If approved, the customer authorizes Austin Utilities to bill them using the customer billing payment option upon completion of the customer's qualifying energy conservation project.

Customer Signature: _____ Date: _____

Austin Utilities Approval Signature: _____ Date: _____