

ENERGY PERFORMANCE PROGRAM PORTAL USER GUIDE

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Energy Performance Program (EPP) Portal User Guide, Version 1.2, January 1, 2025

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1. Welcome to the EPP Portal

Welcome to the EPP portal. Within this release of the portal, you will be able to do the following:

- Create an account
- If you are a super-administrator for a company:
 - Create the company account
 - Have access to all the permissions
 - o Transfer super-administrator access to someone else
 - Invite or approve the second user for the company
- If you are a user with the applicable permissions:
 - Invite other people to join your company
 - Approve other people to join your company
 - Grant people different permissions
 - Manage the Participant Agreement process
 - Create, edit and delete facilities including completing data entry
 - Check the data sufficiency of your electricity and independent variable data for your facility
 - o Run automated baseline energy modelling for your facility
 - o Submit your facility for baseline model review
 - Run automated energy savings and incentive calculations anytime during the pay-for-performance periods

The full list of permissions can be found in Section 6 – User Management and Permissions.

Within subsequent releases, you will have access to more features such as access to data analytics and visualizations, benchmarking, new Participant Agreement management features and additional energy modelling approaches.

2. Account Sign-Up and Creation

There are two different types of accounts that you can sign up for:

- 1) Super Administrator
- 2) Individual User

2.1 Super Administrator:

If you will be responsible for creating the company account, please select

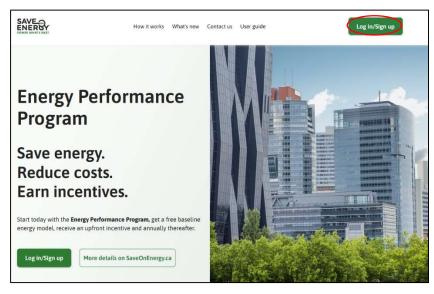
Super Administrator. **Please note that only one account can be a Super Administrator for a company.** Additionally, that user cannot be associated with (have permissions to access) another company.

Tip: Super Administrators have access to all permissions within a company.

Tip: A Super Administrator can transfer their Super Administrator access to another user.

Super Administrators are responsible for inviting or approving the second user to a company. After that, they can enable other users to invite or approve subsequent users and provide them with the access to manage those users' permissions.

If you wish to sign up as a Super Administrator, please do the following:



• Press the "Login/Sign up" Button on the top right

• Press the "Sign Up" text on the top right or at the bottom

		Don't have an account? Sign up
Welcome to the Ener	rgy Performance Program porta	ıl
Email Address *		
Email Address *		
Password *	Forgot password?	
Password *	۲	
Keep me logged in		
Log in		
Don't have an account? Sign up		

• Select the "Super Administrator" tab

Welcome to the Energy Performance Program portal Sign up and start saving			
Individual Super administrator	 Contact Information → (2) Company Details 		
There can only be one super administrator per company. You will be required to verify you name and phone number, and finally enter company information.	ur email first, then select a password and provide your		
Email Address *			
Email Address *			
Send verification code			

• Enter your email and select "Send Verification code". A code will be sent to your email inbox in 5 to 30 seconds

Verify your email address
Thanks for verifying your <u>chenyang@enerva.ca</u> account!
Your code is: 080193
Sincerely, enervastg

- Enter the code provided in the "Verification Code" text box, and select "Verify code"
- Enter your desired password and personal details, and select "Next"

The password needs to be at least 8 characters long, including at least 1 lowercase, 1 uppercase, 1 digit and 1 symbol

email you wish to sign up with. Email Address "		
Chenyang@enerva.ca		
Change sign-up email		
New Password *	Confirm New Password *	
New Password	Confirm New Password	۲
First Name *	Last Name *	
First Name *	Last Name *	
Business Mobile *	Business Landline	
	Business Landline	

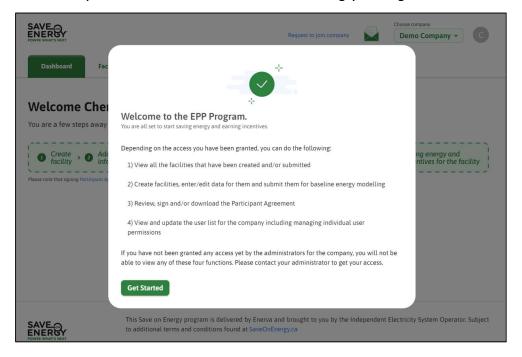
• Complete the process by filling in details about your company, and agree to the terms and conditions

Super administrator Individual	
There can only be one super administrator per com name and phone number, and finally enter compar	pany. You will be required to verify your email first, then select a password and provide your y information.
Company Name *	Website URL
Company Name *	Website URL
How did you hear about us?'	Unit Number
How did you hear about us?*	V Unit Number
Street Number *	Street Address *
Street Number *	Street Address *
City *	Province/State *
City *	Province/State *
Country *	Postal Code *
Canada	Postal Code *
□ I have read and agree to the provisions of the Portal Services A	greement, which includes limitations on Enerva and IESO warranties and liability.
I agree that the information submitted in the sign up form and not personal information of any individual.	in other communications and forms as part of the Program consists solely of business or commercial information and is
I consent to being contacted by IESO or Enerva (IESO Service P gas reducing programs, technologies, products, and services th	rovider) by email, text or other electronic means for program-related matters or about energy efficiency and greenhouse at IESO or Enerva offers.

• For security reasons, confirm your email once more, and click "continue"

Verify your account
Security is important for the EPP portal. Your email account will need to be verified twice during registration. This is the second verification. Please click Send button. Email Address
C******@enerva.ca
Send verification code
Continue Cancel

• Congratulations! Your registration has been completed for the Energy Performance Program Portal. You should be able to see the pop window below and you will also receive an email confirming your registration.



2.2 Individual Users:

If you will not be responsible for creating the company account and do not need access to all permissions within a company, then please sign up as an individual user.

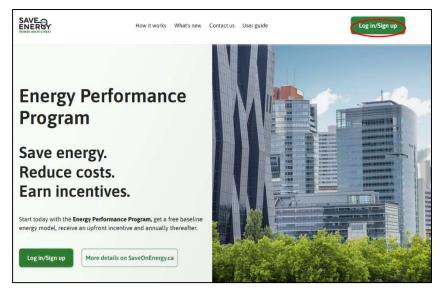
Tip: Individual users will have to be invited to companies or be approved after requesting to join them.

Tip: Individual users can be assigned different roles in different companies.

Tip: Individual users can have all, some or no permissions granted to them, including the permission to invite or approve other users and the permission to manage user permissions for other users.

If you wish to sign up as an Individual User, please do the following:

• Press the "Login/Sign up" Button on the top right



• Press the "Sign Up" text on the top right or at the bottom

	Don't have an account? Sign up
Welcome to the Energy Perfor	mance Program portal
Email Address *	
Email Address *	
Password * Forgot password	rd?
Password *	
Keep me logged in	
Log in	
Don't have an account? Sign up	

• Select the "Individual" tab (should be selected by default)

Welcome to the Energy Performance Program portal Sign up and start saving			
Individual Super administrator			
Individual accounts can work with multiple companies. You can join a company after creating your account.			
Email Address *			
Email Address *			
Send verification code			

• Enter your email and select "Send Verification code". A code will be sent to your email inbox in 5 to 30 seconds

Verify your email address
Thanks for verifying your <u>chenyang@enerva.ca</u> account!
Your code is: 080193
Sincerely, enervastg

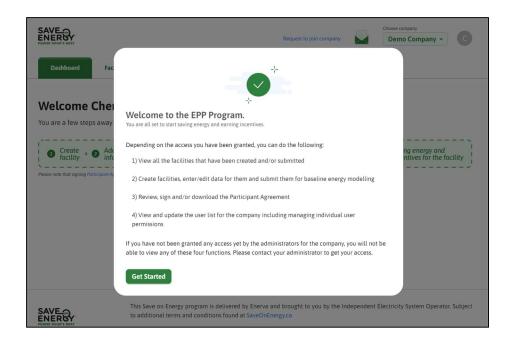
- Enter the code provided in the "Verification Code" text box, and select "Verify code"
- Set your password, enter your personal information, and confirm that you consent to the terms and conditions The password needs to be at least 8 characters long, including at least 1 lowercase, 1 uppercase, 1 digit and 1 symbol

Your email address has been verified. You can now enter your name, password and phone number. You can also change the email you wish to sign up with.			
Email Address *			
harnoor.boparai@enerva.ca			
Change sign-up email			
New Password *	Confirm New Password *		
New Password	Confirm New Password		
First Name *	Last Name *		
First Name *	Last Name *		
Mobile *			
Mobile *			
I have read and agree to the provisions of the Portal Services Agreement, which includes limitations on Enerva and IESO warranties and liability.			
I agree that the information submitted in the sign up form and in other communications and forms as part of the Program consists solely of business or commercial information and is not personal information of any individual.			
Consent to being contacted by IESO or Enerva (IESO Service Provider) by email, text or other electronic means for program-related matters or about energy efficiency and greenhouse gas reducing programs, technologies, products, and services that IESO or Enerva offers.			
Create			

• For security reasons, confirm your email once more, and click "continue"

Verify your a	ccount
	he EPP portal. Your email account vice during registration. This is the e click Send button.
C*****@enerva.ca	
Send verification co	de
Continue	Cancel

• Congratulations! Your registration has been completed for the Energy Performance Program Portal. You should be able to see the pop window below and you will also receive an email confirming your registration.

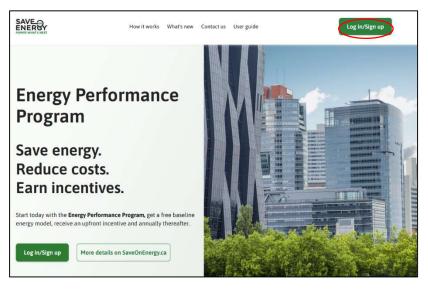


If you are not sure of what user account to sign up for or have any other questions, please contact EPP Support at <u>info@energyperformanceprogram.ca</u> or 1-888-852-2440 (Monday to Friday 9am - 5pm EST).

3. Account Log In

When you signed up successfully, you will be able to log in anytime you want.

• Press the "Login/Sign up" Button on the top right



• Input the Email Address and Password and click "Log in"

		Don't have an account? Sign up
Welcome to the En Log in to continue Email Address *	ergy Performance Program porta	al
Email Address *	Forgot password?	
Password *	۲	
Keep me logged in		

- You may be asked to verify your account click "Send verification code" and input the code you received in your email. And the click "Verify code"
- With successful verification, you will see the notification below. Click "Continue" to go to the dashboard

Verify your account

Your account has been verif button. Email Address	fied. Please click on continue
C******@enerva.ca	
Continue	Cancel

4. Role Selection for Individual Users

Within the portal, there are four different roles within an Individual User account type that can be selected within a company for the EPP program:

- Sub-Administrator
- Employee
- Consultant
- Account Manager/Customer Support This is a role for Energy Performance Program Team Members to support with data entry and navigating the portal

Tip: Individual users can have multiple roles approved for them. For example, an individual user can be an Employee of one company and a consultant for another company.

Roles are useful to define if you plan to set default permissions for groups. For example, if you do not wish to individually manage permissions for 10 different users, you can define a set of permissions for a role. Any users that have been assigned that role will then all have those permissions. The intentions behind the roles are included in the table below:

Role	Intention
Sub- Administrator	This role type is intended for users who will assist with the management of the company account including the following:
	- Inviting and/or approving other users
	- Managing user permissions
	 Being able to view, create, edit, delete and submit facilities for baseline modelling
	 Being able to see all reports and visualizations
	 Being able to manage the Participant Agreement process (if granted permission to be a Binding Authority)
Employee	This role type is intended for users who are employees of the company. They may only be required to:
	 Being able to create facilities if given access
	 Being able to view, edit, delete and submit facilities for baseline modelling where access has been granted to
	 Being able to see reports and visualizations where permission has been granted

4.1 **Role Types and Intentions**

	 Being able to manage the Participant Agreement process (if granted permission to be a Binding Authority)
Consultant	This role type is intended for users who are consultants for the company. They may only be required to:
	 Being able to create facilities if given access
	 Being able to view, edit, delete and submit facilities for baseline modelling where access has been granted to
	 Being able to see reports and visualizations where permission has been granted
Account Manager	This role type was created to support situations where a company does not have individuals to create facilities and submit them for baseline modelling. As required, members of the Energy Performance Program Team can be assigned that role in the company and support the facility creation, data entry and submission process.

Tip: Please note that permissions can be granted for any role. A consultant can be given permission to be a Binding Authority and sign the Participant Agreement if needed.

If you are not sure of your role selection or have any other questions, please contact EPP Support at <u>info@energyperformanceprogram.ca</u> or 1-888-852-2440 (Monday to Friday 9am - 5pm EST).

4.2 Requesting to Join Company and Selecting Role

To request to join a company and select a role, please do the following:

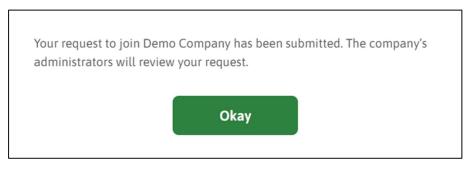
• Press the blue "Request to join company" in the top right corner

	Request to join company.
Dashboard	
Welcome	to the EPP Portal
Please note, you do not have access to view thi	s page. Administrators will give you access to see the dashboard.
If you have received an email from a company to join, you can join that compa	my by accepting the invitation by clicking on the notification icon in the header in the top right.
If you are a new user, and want to join a com	pany, please click on "Request to join company" on the header.

• Type in the Company Name. Only exact matches will allow you to continue with the process

ew this		you ac
company to join	Request to join company	the notificatio
	Please enter the following details to send request to join company	
u are a new use	Company Name Company E Company E	ny" on the head

• Select your desired role from the dropdown, press Submit, and you will get the pop-up window below



Tip: The roles and permissions can be changed by the Super-Admin when the invitation is accepted, and it can be also changed in the future.

5. Changing Company View

If you are part of multiple companies, you can change the company view by doing the following:

• Click the Company dropdown in the header, and select the company you want to use

Company Y Company T
the following steps:
the following steps:
your $\rightarrow \bigcirc$ Start saving energy and earn incentives for the facility
Participant Agreement.

Tip: The look of dashboard and available functions may be varied when switching companies, this is because the user may have different roles and permissions given by the Super-Admin of that company

6. User Management and Permissions

6.1 General User Account Management

If you are the Super-Admin or you have been given permission, you can manage user accounts for the company via the "User Management" tab as shown below.

			Request to j	oin company	Choose company Demo Company C
Dashboard	Facility List Particip	ant Agreement	User Management		
User Managen	ient		All users 👻	Search	Invite User
ALL USERS					Request to join company
Name 븆	Email ID	Facility name	Role Type 🖨	Status	Action
	yesfrankie@gmail.com		Employee	Invitation sent	Manage permission Delete
Chenyang Zhang	Chenyang@enerva.ca		Super-Admin	Active	View permission Delete
Harnoor Boparai	harnoor.boparai@enerva.ca		Employee	Active	Manage permission Delete
			Rows p	er Page: 10 💌 Page 1	of1 < < 1 > >

6.2 Inviting Users to Company

To invite a user and select a role for them, please do the following:

• Press the "User Management" tab, and select "Invite User"

			Request to join company	P	Choose company Demo Company C
Dashboard	Facility List	Participant Agreemen	nt User Management		
Invite user	and set perm	issions			
lusiness Email*	Role Type				
	Select	t			Send Invite
Business Email	Seleci				
Business Email	Selec	-t			
Business Email					
Business Email	Selec Empl Cons		Please select role type		

• Enter the email of the individual you would like to invite, and select the role you wish for them to have, you will also choose to grant different permissions from the list

		Request to join company	Choose compa	ompany - C
Dashboard Facility List	Participant Agreement	ser Management		
Nite user and set p	ermissions			
Business Email* Ro	le Type*			
yesfrankie@gmail.com	Employee 👻			Send Invite
List of Permissions			Toggle to grant	
Inviting and adding other users to the	company account		YES NO	
Grant/revoke access to and from othe	r users in the company account		YES NO	
Updating the company account profil	e information and super administrator pa	ssword	YES NO	
Binding the company to sign and view	the Participant Agreement		YES NO	
Creating a facility <having access="" t<="" td="" to=""><th>he add facility button></th><td></td><td>YES NO</td><td></td></having>	he add facility button>		YES NO	
Completing facility data entry <being< td=""><th>able to complete the Details, Energy + Wa</th><td>ater, other facility data input tabs></td><td>YES NO</td><td></td></being<>	able to complete the Details, Energy + Wa	ater, other facility data input tabs>	YES NO	
Delete Facility			YES NO	
Send Invite				

Tip: The screen below will be popped up if you grant permission to the user for "Binding the company to sign and view the Participant Agreement"



6.3 Approving Users to Join Company

To approve a user who has requested to join the company and grant a role for them, please do the following:

• Head to the "User Management" tab, and select accept or reject on the

request you wish to approve or deny

				Request to join company	Choose company Demo Company C
Dashboard	Facility List Partic	cipant Agreement	User Mana;	zement	
Jser Manage	ment		A	ll users 👻	Invite User
ALL USERS	-				Request to join compar
Name 🖨	Email ID 🖨	Facility name	Role Type 🖨	Status	Action
Harnoor Boparai	harnoor.boparai@enerva.ca		Employee	Accept Reject	Manage permission Delete
	yesfrankie@gmail.com		Employee	Invitation sent	Manage permission Delete
Chenyang Zhang	Chenyang@enerva.ca		Super-Admin	Active	View permission Delete
				Rows per Page: 10 V Pa	agelofi K < 1 > >K

• After clicking accept, the permissions management can be updated

			Reque	st to join company		Choose company Demo Company C
Dashboard	Facility List	Participant Agreement	User Management			
Manage p	ermission					
Business Email*	Role	ype"				
harnoor.boparai@	enerv Em	ployee 👻				Update Permission
List of Permissions					Τοį	zgle to grant
Inviting and adding ot	her users to the co	mpany account			YES	NO
Grant/revoke access to	o and from other u	sers in the company account			YES	NO
Updating the company	y account profile in	formation and super administra	tor password		YES	NO
Binding the company t	to sign and view th	e Participant Agreement			YES	NO
Creating a facility <ha< td=""><td>ving access to the</td><th>add facility button></th><td></td><td></td><td>YES</td><td>NO</td></ha<>	ving access to the	add facility button>			YES	NO
Completing facility da	ita entry <being ab<="" td=""><th>le to complete the Details, Energ</th><td>y + Water, other facility d</td><td>lata input tabs></td><td>YES</td><td>NO</td></being>	le to complete the Details, Energ	y + Water, other facility d	lata input tabs>	YES	NO
Delete Facility					YES	ю
Update Permission	1					

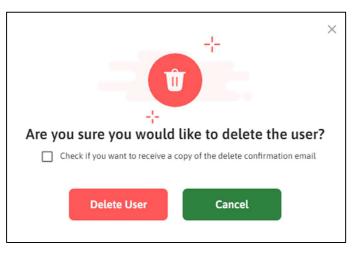
6.4 Deleting/Removing Users from Company

To delete or remove a user in the company list, please do the following:

• Head to the "User Management" tab, and press "delete" on the user you wish to remove

		Request to	Choose company Demo Company C			
Dashboard	Facility List Particip	ant Agreement	User Management			
Jser Managen	nent		All users 👻	Search	Invite L	Jser
ALL USERS	-				Request to joi	n company
Name 🕏	Email ID	Facility name	Role Type 🖨	Status		Action
	yesfrankie@gmail.com		Employee	Invitation sent	Manage permission	Delete
Chenyang Zhang	Chenyang@enerva.ca		Super-Admin	Active	View permission	Delete
Harnoor Boparai	harnoor.boparai@enerva.ca		Employee	Active	Manage permission	Delete
			Rows p	per Page: 10 🔻 Page	lof1 < < 1 >	>1

• Select "Delete User" to confirm the removal of the user



6.5 List of Permissions

Permission	Type of Access
Inviting and adding other users to the company account	The ability to invite other users to the company account and select their role.
	The ability to review join requests from other users and approve them joining the company with the role they have selected.

Grant/revoke access to and from other users in the company account	The ability to manage permissions for other users associated with the company.
Updating the company account profile information and super administrator password	The ability to change the company details and update the super administrator password.
Binding the company to sign and view the Participant Agreement	The ability to view and download the Participant Agreement.
	The ability to electronically sign the Participant Agreement.
	The ability to upload a manually signed Participant Agreement.
	The ability to view and download the signed Participant Agreement.
Creating a facility <having access="" add="" button="" facility="" the="" to=""></having>	The ability to create a facility for the company.
Completing facility data entry <being +<="" able="" complete="" details,="" energy="" td="" the="" to=""><td>The ability to view, edit a created facility</td></being>	The ability to view, edit a created facility
Water, other facility data input tabs>	The ability to submit a facility for baseline modelling.
Delete Facility	The ability to delete a created facility

7. Participant Agreement Management

7.1 Viewing and Downloading Participant Agreement

To navigate to and view the Participant Agreement, please do the following:

• Head to the "Participant Agreement" tab. A copy of the Participant Agreement will be shown here.

			Request to join company		Choose company Demo Company -
Dashboard	Facility List Participant A	greement User Manager	nent		
Participant Ag	greement				
Read and sign the click to e-sig	he Participant Agreement to en gn button	rol your facilities. If you are	e going to e-sign, plea	ase scrol	l to the bottom to activate
	ieso Pouris Envir Pouris Envir	Rey			
		RMANCE PROGR	MAX		_
	PARTICIPANT	AGREEMENT			
	respect of electricity savings energy efficiency measures a under the Save on Energy - E	Applicant" in the Application) h achieved at one or more Faciliti nd equipment retrofits, pursuant nergy Performance Program (the its. All capitalized terms not defin reement.	es through operational a to the Application submit "EPP" or the "Program"	nd mainte ted to the ") in accor	enance e IESO rdance
		nance Incentives being provided which are hereby acknowledge			

• Scroll to the bottom of the User Management page. There will be two options here: "Click to e-sign", and "Download as PDF"

SAVE	Choose company
POWER WHAT'S NEXT	Request to join company Demo Company -
	Adjustment (NRA) within 60 days of becoming aware of such NRE. In the event of disagreement as to whether an event constitutes a Non-Routine Event, the opinion of the IESO shall govern.
	2021-0224 CDH Pramework – Energy Performance Program (EPP) Participant Agreement, Version 3.0, Pebruary 27, 2024 1
	2. PARTICIPANT OBLIGATIONS, ELIGIBLE MEASURES AND SAVINGS SUBMISSION
	Solumi Solumi In addition to the other obligations contained in this Agreement, the Participant will fulfill the following obligations in order to maintain its eligibility in the Program and as a condition of receiving any Performance Incentives:
	(a) The Participant will implement Eligible Measures for each Facility before the end of the second Pay-For-Performance Period.
	(b) After the generation of the Baseline Energy Model for a Facility via the EPP Portal, the Participant will not enroll in any program or initiative incentivizing electricity savings and/or peak demand savings undertaken by the Government of Ontario or the IESO to receive any incentives for that Facility. The Participant will inform IESO if any projects receiving electricity saving incentives and/or peak demand savings are commissioned after the

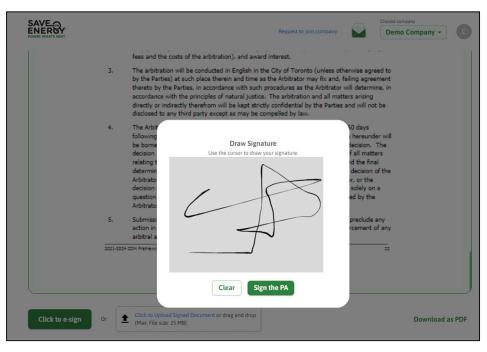
Tip: These two options will only be working when the PA is fully scrolled down.

There are two options to sign the Participant agreement.

7.2 Electronic Signature of Participant Agreement

To e-sign the Participant Agreement:

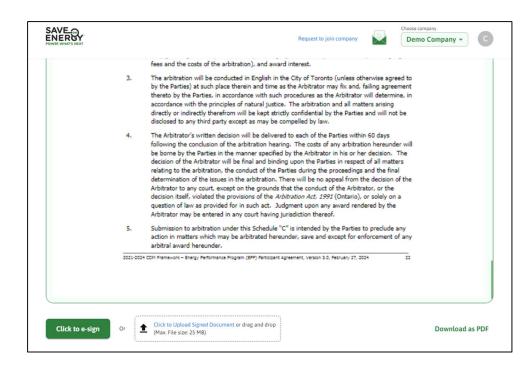
• Press on the "Click to e-sign" option and draw your signature within the grey popped-up box. If you wish to redo the signature, press the "Clear button". If you are happy with your signature, press the "Sign the PA" button.



7.3 Manual Signature and Upload of Participant Agreement

To manually sign the Participant Agreement:

- Press the download button in the bottom right corner to download it as a PDF file.
- Sign the Participant Agreement either manually or via your preferred document signing software.
- To Upload the signed Participant Agreement, Click the "Upload Signed Document" button, or drag the signed document into the space.



7.4 Viewing and Downloading Signed Participant Agreement

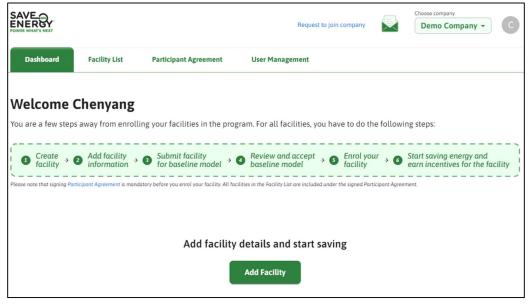
To navigate to and view the signed Participant Agreement, please do the following:

- Head to the "Participant Agreement" tab. A copy of the Participant Agreement will be shown here. The signature will be on page 13. You will not be able to edit this signed document.
- To download a copy of this signed document, scroll to the bottom of the page, and press the "Download the signed participant agreement" button.



8. Dashboard

The dashboard is the homepage where you will be able to navigate through the platform. For release 1, you will just be able to add a facility on the screen if you have been given access. For future releases, this is where you will see all the reporting and visualization.



9. Facility List

This is the screen where you will see all the facilities that have been created that you have access to. If you have the permissions to edit facilities, submit them for baseline modeling or give other people access to facilities, this is where you will do it.

Dashboard	Facility List	Participant Agreement	User Management		
Facility List			Search by Facility name	Assign Access	Add Facility 🕂
Name/Nick Name 🖨	Total Electicity Savings	% Energy Savings	Total Incentive Earned Benchmarking EUI	Facility Status	Actions
Test Facility 1				Draft	Edit Delete
Test Facilit 2				Draft	Edit Delete
			Rows per Page: 10	▼ Pagelofl K K	1 > >

10. Adding Facilities

First, in order to start your application, you need to create a facility:

• Head to the "Facility List" tab. Press on the "Add Facility +" button. Optionally, the dashboard tab also has the "Add Facility" button.

			Requ	iest to join company	Choose company Demo Com	pany - C
Dashboard	Facility List	Participant Agreement	User Management			
Facility List			Searc	h by Facility name	Assign Access	Add Facility 🕂
Name/Nick Name 🕏	Total Electicity Savings	% Energy Savings	Total Incentive Earned	Benchmarking EUI	Facility Status	Actions

• You will be redirected to a page where you can enter basic facility details. Mandatory fields are identified with an asterisk (*). Once done with the data entry, press the "Add Facility" button at the bottom of the page.

		Request to join com		hoose company Demo Company C
Dashboard Facility List	Participant Agreement	User Management		
Add Facility Facility Details				Status: Draft
Facility construction status*	Facility name*			
Facility category*	Facility type*	•	NAIC's code*	
What is your target energy savings for this facil 5 5 % Facility photo	100 %			
Address				
Unit number	Street number*		Street name*	
City*	Province*	Country*	Po	stal code*
	Ontario	Canada		
Add Facility				

Tip: The facility needs to be an "Existing Building" in "Ontario, Canada" to participate in the EPP program. And the facility shall achieve a minimum of five percent (5%) of the Total Electricity Savings by the end of the second Pay-for-Performance Period (the "Minimum Savings") as required in the Participant Agreement

• If you wish to edit the facility details that you have entered in this section, press the "Edit" button next to the facility you wish to edit.

			R	equest to join company	Choose company Demo Co	
Dashboard	Facility List	Participant Agreement	User Manageme	nt		
Facility List			Se	arch by Facility name	Assign Access	Add Facility 🕂
Name/Nick Name 荣	Total Electicity Savings	% Energy Savings	Total Incentive Earned	Benchmarking EUI	Facility Status	Actions
Test Facility					Draft	Edit Delete
				Rows per Page: 10 👻	Pagelofl K K	1 > >

11. Facility Data Entry

11.1 Summary Tab

The Summary tab is the landing page for your facility and is where your energy model will be displayed.

- Head to the "Facility List" tab. Hover over the facility you wish to view and click on it.
- If you have not submitted energy data yet, your summary page will not display a model yet. After you have submitted your data, the model will be displayed here.
- The Pending tabs will show the color Pink/Orange and the Completed tabs will show the color Green

		Request to join compan	y 💌	Choose company Demo Company	с
Dashboard Facility List	Participant Agreement	User Management			
Create Facility	Enter Facility Data	Submit Facility Accept Ba	seline Model	Facility Enrolled	
Test Facilit 123, Test Road Toronto, Canac Ontario, TLEIS	a Total	Energy saving On-Peak Off-Peak \$3255.00		Facility UBI 87M2MG2M+54	
Draft Edit Delet	Incentives 2nd P4P Incentives 1st P4P Incentives	\$750.00 \$800.00 \$525.00 \$560.00 500.00			
Summary Details	Facility Category				
Energy and Water	Office has not been uploaded and v	verified yet or uploaded data is in pro	ocessing state,	so this visualization is not	
Savings Plan and Document					
Pending Completed					

11.2 Details Tab

There are three sections in the Details Tab, which are Characteristics, Heating and cooling systems and Operational details

		Facility Data	Submit Facility	Accept Baseline Model	Facility Enrolled
Â	Test Facility 123, Test Road Toronto, Canada Ontario, T1E1S1 Draft Edit Delete	Incentive Soci P4P Incentives Incentives Incentives Incentives Pre-Project Incentives	■ Off-Peal \$3255.00		Facility UBI 87M2MG2M+54
Summary	Characteristics				0
Details Energy and Water	Heating and coo	ling systems			0
Weather & Independent Variables Savings Plan and	Operational deta	ils			0
Document Pending Completed	Save				

 Press on the "+" button to expand each section. Mandatory fields are identified with an asterisk (*).

• Characteristics

Characteristics		•
Annual operational hours*	Year of construction*	
Conditioned gross floor area including common area (Sq ft)	Unconditioned gross floor area such as parking lots (Sq ft)	
Number of storeys*		
Facility electricity service size (Amps)	Facility service entrance voltage (Voltage)	

• Heating and cooling systems

Heating and cooling systems		0
Space cooling energy source*		
•		
Space cooling technology*		
•		
Space heating energy source*		
Space heating technology*		
•		
Water heating energy source*		
•		
Water heating technology*		

Does the facility have energy-using equipment that is not standard HVAC? Please check all that apply.
Industrial/Process
Refrigeration
Compressed air
Commercial kitchen
Swimming pool
Other
None
Space cooling technology description Space cooling technology age (Years)
Space cooling technology capacity (Tons) Space cooling efficiency (EER, SEER, COP)
EER -
Space heating technology description Space heating technology age (Years)
Space heating technology capacity (MBH) Space heating efficiency (%, HSPF, COP)
% -
Water heating technology description Water heating technology age (Years)
Water heating technology capacity (MBH) Water heating efficiency (%, COP)
% ~

Tip: If you choose "Other", another input box will appear and ask you to describe the specifications.

• Operational details

Operational details		•
Maximum number of occupants	Average number of occupants	
Year round or seasonal Year round 🗸		
Is lighting controlled for occupancy?	Is space heating controlled for occupancy? YES NO	Is space cooling controlled for occupancy? YES NO

• Once done with the data entry, press "Save", and you will get the pop-up message below

Facility details	\times
The facility details have been updated successfully	ι.
Okay	

11.3 Energy and Water Tab

Energy consumption data is required to determine eligibility and develop the baseline model. The applicant needs to add a meter to the facility to proceed.

Create F	Facility	Enter Facilit		Submit Facility	Accept Ba		lodel	Facility	Enrolled
	Test Facility 123, Test Road Toronto, Canada Ontario, T1E1S1 Draft Edit Delete		Total Incentives 3rd P4P Incentives	Energy saving On-Peak On-Peak 33255.00 5750.00 5.00 5.00 5.00 5.00 5.00 5	k			Facility 87M2	MG2M+54
Summary	Meter type	Electricity	Water	Natural Gas					
Details	Total meters	0	0	0					Add Meter 🕂
Weather & Independent Variables Savings Plan and Document	Current date			Þ					
Pending Completed	Meter name	Meter type	Meter ID 븆	Status	Most recent update	¢	In use(inactive date)	¢	Actions
				No Data foun	d.				

• Press on the "Add Meter +" button

• Mandatory fields are identified with an asterisk (*). Once done with the data entry, press "Add Meter" to go to the next section

Add Meter		
Add Meter		
Meter Type*		
ELECTRICITY NATURAL GAS WATER		
Purchased from the Grid O Behind-the	Meter Generation	
Meter name*	Meter ID*	Unit*
	Meter number can be found on the electricity bill	
	Ditt	
Is meter still in use?*		
Date meter became active	Date meter became inactive	
DD/MM/YYYY	DD/MM/YYYY	
Is this a revenue-grade meter?*		
YES NO		
YES NO		
Upload the most recent utility bill*		

• Once you have submitted your meter, press "Add data" from the previous page.



• Press "Add entries" and upload electricity consumption data set for the baseline development. The format of this submission must follow the spreadsheet linked in the red circle below.

Summary	€
Details	Meter Name Meter ID Meter type Date meter became active Revenue-grade meter Edit Delete Meter 112233 Electricity 2006-08-02 Revenue-grade meter Edit Delete
Energy and Water	HOURLY OR SUB-HOURLY ENTRIES MONTHLY ENTRIES View entries Delete entries 📀 Add entries
Weather & Independent Variables	
Savings Plan and Document	Upload data in bulk for this meter You can upload a Green Button XML file or an Excel-compatible file. Use the single meter spreadsheet grupload the Excel file.
Pending Completed	Choose File
	I hereby certify that this is the original file from the Utility.
	Upload

• The Spreadsheet format, an example pictured below, needs to have the starting hour of the observation in the first column, the end hour in the second column, and the Meter reading (in kWh) in the third.

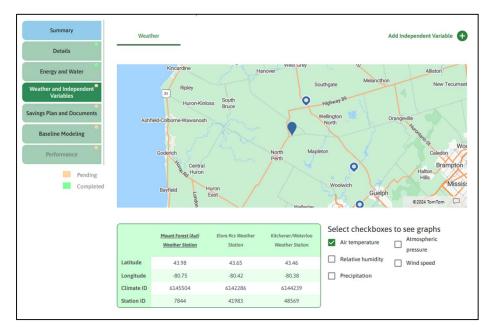
Fi	ile <mark>Home</mark> Insert	Page Layout Formu	las Data Review	View A	utomate Developer
1	Calibri B I	\downarrow	≡ ≡ ë¢ Custo ≡ ≡ ₫ ~ \$	om ~ ~ % 9	🔛 Conditional Formatti
ŀ	Paste ✓ ↔ ✓	• • A • =		.00 →0	Cell Styles ~
				umber 🔽	Styles
-					Styles
D1	• • • × ✓	$f_x \sim$			
1	А	В	С	D	E
	Start Date (Required)	End Date (Required)	Meter Reading		
1			(Required)		
2	2022-03-02 0:00	2022-03-02 1:00	137.76		
3	2022-03-02 1:00	2022-03-02 2:00	141.36		
4	2022-03-02 2:00	2022-03-02 3:00	138.00		
5	2022-03-02 3:00	2022-03-02 4:00	137.52		
6	2022-03-02 4:00	2022-03-02 5:00	134.64		
7	2022-03-02 5:00	2022-03-02 6:00	144.24		
8	2022-03-02 6:00	2022-03-02 7:00	156.96		
9	2022-03-02 7:00	2022-03-02 8:00	182.64		
10	2022-03-02 8:00	2022-03-02 9:00	188.88		
11	2022-03-02 9:00	2022-03-02 10:00	191.04		
12	2022-03-02 10:00	2022-03-02 11:00	190.32		
12	2022-03-0211.00	2022-03-02 12:00	192 00		

Tip: The Meter ID number can be found on the electricity bill. The electricity bill also provides information of service level (needs to be >50kW to be eligible) and facility address

11.4 Adding Independent Variables

Some facilities may have additional data that you can provide, which may increase the accuracy of the baseline model generated by the EPP Portal. This type of data are called Independent Variables. This is an optional feature and is not required for the creation of the baseline.

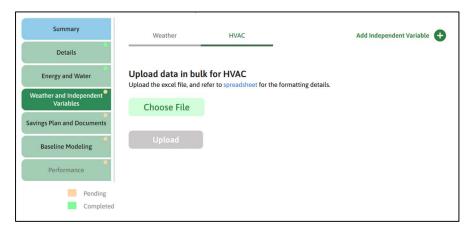
• On the facility page, press on the "Weather and Independent Variables" tab. By default, you can see that the portal considers outside air temperature as a variable.



• In order to add additional variables, press on the "Add Independent Variable" button on the top right. A window will appear, prompting you to enter the variable name and a short description.

Please enter the fo	ollowing details to add a new independent variable for this mete
Independent Varia	ble Name
ndependent Varia	ble Description

 You will be redirected to a page where you can upload a spreadsheet with your independent variable data. You can create as many independent variables as you want. In the screenshot below, the independent variable data has been called HVAC. A spreadsheet template can once again be downloaded for your convenience.



• The formatting for the independent variable is similar to the format for baseline. Place the starting hour of the observation in the first column, the end hour in the second column, and independent variable in the third.

For the independent variable, there can be various formats. You may have a binary format, where 1 indicates the "on" state, when the consumption is actively affected by the variable, and 0 indicating the "off" state, where consumption is not being affected by the variable.

F	ile H	ome	Insert	Page Lay	out	Formu	las	Data	Review	View	Autom
$\begin{array}{c c c c c c c c c c c c c c c c c c c $											
		A			В			С			D
1	Start D	ate (R	equired)	End Date	(Requ	uired)	м	leter R (Requ	eading ired)		
523	2	020-09	9-22 17:00	2020	-09-22	18:00			1		
524	2	020-09	9-22 18:00	2020	-09-22	19:00			1		
525	2	020-09	9-22 19:00	2020	-09-22	20:00			1		
526	2	020-09	9-22 20:00	2020	-09-22	21:00			1		
527	2	020-09	9-22 21:00	2020	-09-22	22:00			1		
528	2	020-09	9-22 22:00	2020	-09-22	23:00			1		
529	2	020-09	9-22 23:00	202	0-09-2	3 0:00			0		
530	1	2020-0	09-23 0:00	202	0-09-2	3 1:00			0		
531			09-23 1:00			32:00			0		
532			09-23 2:00			3 3:00			0		
533			09-23 3:00			34:00			0		
534			09-234:00			3 5:00			0		
535			09-23 5:00			36:00			0		
536			09-236:00			37:00			0		
537			09-237:00			38:00			0		
538			09-238:00			39:00			1		
539			09-23 9:00			10:00			1		
540			9-23 10:00			11:00			1		
541	2	020-09	9-23 11:00	2020	-09-23	12:00			1		

• The independent variable can also be in a format where you have numbers indicating an activity, such as the amount of product being manufactured or the occupancy of a building.

Fi	le <mark>Home</mark> Insert Pa	ge Layout Formulas	Data Review View	Automate							
	$\begin{array}{c c c c c c c c c c c c c c c c c c c $										
G3	$G3 \qquad \checkmark \mid \times \checkmark f_{x} \checkmark$										
	A	В	C	D							
	Start Date (Required)	End Date (Required)	Meter Reading								
1			(Required)								
2	2020-07-01 0:00	2020-07-01 1:00	4801.666667								
3	2020-07-01 1:00	2020-07-01 2:00	4801.666667								
4	2020-07-01 2:00	2020-07-01 3:00	4801.666667								
5	2020-07-01 3:00	2020-07-01 4:00	4801.666667								
6	2020-07-01 4:00	2020-07-01 5:00	4801.666667								
7	2020-07-01 5:00	2020-07-01 6:00	4801.666667								
8	2020-07-01 6:00	2020-07-01 7:00	4801.666667								
9	2020-07-01 7:00	2020-07-01 8:00	4801.666667								
10	2020-07-01 8:00	2020-07-01 9:00	4801.666667								
11	2020-07-01 9:00	2020-07-01 10:00	4801.666667								
12	2020-07-01 10:00	2020-07-01 11:00	4801.666667								
13	2020-07-01 11:00	2020-07-01 12:00	4801.666667								
14	2020-07-01 12:00	2020-07-01 13:00	4801.666667								
15	2020-07-01 13:00	2020-07-01 14:00	4801.666667								
16	2020-07-01 14:00	2020-07-01 15:00	4801.666667								
17	2020-07-01 15:00	2020-07-01 16:00	4801.666667								
18	2020-07-01 16:00	2020-07-01 17:00	4801.666667								
19	2020-07-01 17:00	2020-07-01 18:00	4801.666667								
20	2020-07-01 18:00	2020-07-01 19:00	4801.666667								
21	2020-07-01 19:00	2020-07-01 20:00	4801 666667								

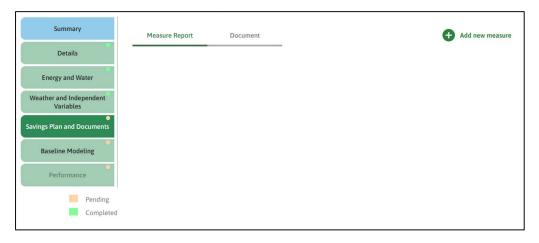
• Once you have uploaded the independent variable spreadsheet, please remember to press the upload button once more to confirm. You should see a "Processing started" notification on the top right of the screen.



11.5 Savings Plan and Documents

This is the location for you to store documents that outline your savings plan, any projects that you may have completed on the site, invoices, and any other documents you may want to save for the reviewer to access.

• Press on the "Savings Plan and Documents" tab. You can add a new measure by clicking on the "Add new measure" button on the top right.



Measure category	Measure installation costs
	•
Measure description	
Measure description Measure installation start date DD/MM/YYYY	Measure completion date
Measure installation start date	

• Here, you can fill a variety of fields detailing the measures that have been completed.

• To add a document, click on the "Document" tab on the top, and select the type of document you wish to upload. Then, press the "Add document" button on the top right.

Summary	Measure Report	Document				Đ	Add document
Details							
Energy and Water	All Study Report	Design Report	Drawing	Invoice	Quotation	Certification	Photo
eather and Independent Variables							
o ings Plan and Documents							
Baseline Modeling							
Performance							
Pending							
Completed							

• Here, you can fill in details about the document you are uploading. Press the "Add" button to finalize the upload.

Add Document						
Select file						
Upload						
Please upload a file before submitting this document.						
Document name*	Document type					
	-					
Document description						
Add						

11.6 Baseline Modelling

Once you have finished filling out the other tabs, you can head over to the Baseline Modelling tab to generate your baseline model.

• Once you have pressed "Baseline Modelling", the portal will clean up your baseline data. This will cause the page to load for a while, but this is normal. Please do not refresh the page.

Summary Details	Data exploration	Baseline model	
Energy and Water	Visualization	Э	0
Weather and Independent Variables	Electricity	Natural gas	
Savings Plan and Documents		indiate Pas	
Baseline Modeling			
Performance			
Pending Completed			

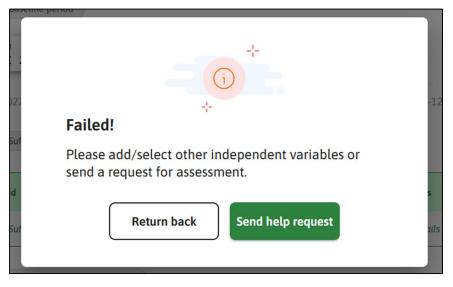
• Once it has finished loading, press on the "Baseline model" tab. Here, you can select the period that you wish to create a baseline for and enable any independent variables that you have added. The model type will be automatically selected by the Portal to ensure that the model generated has the highest accuracy possible.

Once you are satisfied with your selection, press on the "Calculate baseline" button.

Data exploration	Baseline model				
Electricity Na	tural gas	_			
Model constructor					9
Baseline period					
Baseline Start 2022-01-01	Baseline End 2022-12-31	\backslash			
•	2022-12-51)			
2822-01-01				2024-12-20	
Sufficiency verification					
id	Hourly	Daily	Monthly	details	
Sufficiency verification	Verify	Verify	Verify	See details	
Baseline independent var	iable)	
Model granularity					
Hourly Daily					
Calculate baseline					

• If your baseline has failed, you will see the following message pop up. You can return to the sheet to continue tinkering with your baseline model by pressing the "Return back" button, or if you require assistance, you can press the "Send help request" button.

If you do decide to send a help request, an administrator will assist you in selecting parameters that will generate an acceptable baseline model.



• Please be aware that you will be locked out from further edits to your baseline model if you do choose to request assistance from an administrator.

Details	Data exploration	Baseline model				
Energy and Water	Electricity N	latural gas				
Weather and Independent Variables	Model constructo	r				•
Savings Plan and Documents						
Baseline Modeling	Baseline period					
Performance		aseline End 21-08-31				
Pending Completed	2020-09-01	0			2024-12-20	
	Sufficiency verification					
	id	Hourly	Daily	Monthly	details	
	Sufficiency verification	Verify	Verify	Verify	See details	
	Baseline independent v	ariable				
	Mvac					
	Model granularity					
	Hourly Daily					

• When an administrator has returned a model to you, you can accept by pressing a button on the top right, on the Baseline modeling page.

12. Submitting a Facility for Baseline Modelling

After providing all the information above, and generating a valid baseline model, you will be able to press the "Submit facility" button. Our technical review team will contact you if more information is needed. If not, you will receive an email with confirmation of your enrollment.

Details Energy and Water Weather and Independent Variables	Electricity Natural gas Electricity baseline has been successfully calculated on :2024-12-20 03:57:39							
Savings Plan and Documents	Model constructor					•		
Baseline Modeling Performance	Baseline period							
Pending Completed		Baseline Start 2020-12-13	Baseline End 2021-12-14					
	2019-01-01	•	•		2024-12-20			
	Sufficiency verification							
	id	Hourly	Daily	Monthly	details			
	Sufficiency verification	Verify	Verify	Verify	See details			
	Baseline independent var	iable						
	Model granularity							
	Hourly Daily							
	Calculate baseline							

13. Submitting Documents for Your First Payment for Performance (P4P) Period

Once you have completed implementing energy-saving improvements to your facility, and have collected a year's worth of data, you are ready to submit documents for your first pay for performance period.

• To begin, navigate back to the facility that you wish to submit your payment for performance (P4P) data for. A new tab named "Performance" should be available.

Summary	Summary	
Details	NAIC's Code 31-33	Facility Category Manufacturing/Industrial
Energy and Water		
Weather and Independent Variables		
Savings Plan and Documents		
Baseline Modeling		
Performance		
Pending		
Completed		

13.1 Uploading your Data

The process for uploading energy consumption data is identical to uploading the data for the baseline.

• Select the Energy and Water tab, select the meter you wish to upload data for, and press "add data". Then, press on the "Add entries" button on the top right, and upload your data.

Remember that the formatting must follow the sheet that is linked on the upload page, which is once again identical to the baseline upload.

Summary Details	Meter type Total meters Current date	Electricity 1 2024-12-18	Water 0	Natural Gas O		Ad	d Meter 🕂
Energy and Water							
Weather and Independent Variables	Meter type	Meter ID 🖨	Status	Most recent update	In use (inactive) date 🕈		Actions
Savings Plan and Documents	Electricity	123	Active	12/18/2024		Add data Ec	lit Delete
Baseline Modeling				Rows per Page:	10 ▼ Pagelofl K	< 1	> >
e Performance							
Pending Completed							

13.2 Non-routine Adjustments (NRA)

During the duration of a P4P period, you may encounter one-time events that may have led to extra energy consumption. Non-routine adjustments allow you to account for this during your P4P period. These are done on a case-by-case basis, so please contact us at <u>info@energyperformanceprogram.ca</u> if you believe that you need a nonroutine adjustment for your application.

• To upload NRA data, head over to the performance tab on the left. Here, you can see various information about your baseline and performance period. Select the "Performance period reporting information" dropdown.

Summary	Electricity Natural gas	Submit Savings Report
Details	Baseline summary	0
Energy and Water		
Weather and Independent Variables	Performance period data summary	0
Savings Plan and Documents		
Baseline Modeling	Performance period reporting Information	0
Performance		
Pending	Performance period data visualization	O
Completed	Tabular Summary	0
	laboral Summary	v

• On the top right, you can press the "Add non-routine event" button to submit your NRA data.

Baseline Modeling	Performance period repo	rting Information		•
Performance	FIRST PAY-FOR-PERFORMANCE	SECOND PAY-FOR-PERFORMANCE	THIRD PAY-FOR-PERFORMANCE	
Pending Completed				Add non-routine event
	Pay-for-performance period	From 03-02-2022, to	MM/DD/YYYY	Non-routine event name
	Adjusted baseline electricity consumption (kWh)		Estimated 💌	Non-routine event is not added yet.
	Reporting period electricity		Estimated 👻	

• Here, you can fill in the basic details of your event, as well as the duration of the event.

Event period from*		Event period to*	
MM/DD/YYYY	ā	MM/DD/YYYY	Ċ.
Event name*			
Comment			

- Once you have created an event, there are two ways you can add the non-routine adjustment data:
- First, you can add the data via the filled data option in the portal. Press "Add more row", and a new row should be added. Fill in the start and end date of your non-routine adjustment and the **total** amount of energy added during the non-routine adjustment. Once you are done adding rows, you can press "Done" to submit your data.

Add Non-routin	e Event Data		
Filled data	Upload data in bulk		
Start date*	End date*	Non-routine adjustment*	Action
MM/DD/Y)	MM/DD/YYY		Delete
Done	Add more row		

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 You can also submit non-routine adjustment data by uploading a file. Select the "Upload data in bulk" option, and you can upload a spreadsheet of your extra energy consumption during the period. As always, please follow the formatting of the spreadsheet linked on the page.

Edit non-routi	ne event data
Filled data	Upload data in bulk
Upload data in b Upload the excel file,	ulk and refer to non-routine adjustment spreadsheet for the formatting details.
Select File	
Universit	
Upload	

• If you want to edit your non-routine adjustment data, press on the name of the NRA data you wish to edit, press "edit", and then press "Edit non-routine data".

FIRST PAY-FOR-PERFORM	IANCE	SECOND PAY-FOR	R-PERFORMANCE	THIRD PA	Y-FOR-PERFORMANCE
1					
				A	dd non-routine event
Pay-for-performance period	From 1	0-21-2022, to	MM/DD/YYYY		Non-routine event
Adjusted baseline electricity consumption (kWh)			Estimated	•	Tornado
Reporting period					
L					
-2022					Event name ^{Tornado}
re, please add non	routin	e data.			
	Adjusted baseline electricity consumption (kWh) Reporting period	Adjusted baseline electricity consumption (kWh) Reporting period	Period Adjusted baseline electricity consumption (kWh) Reporting period	Adjusted baseline electricity consumption (kWh) Reporting period	Adjusted baseline electricity consumption (kWh) Reporting period

Event period from*	Event period to*	
10/26/2022	10/31/2022	Ē
Event name*		
Tornado		
Comment		

13.3 Submitting Your Pay for Performance Period

Now that you have entered all the information required to complete your pay for performance period, you can start the process of submitting the data.

• Head over to the performance tab on the left and select the "Performance period reporting information" dropdown.

Summary	Electricity Na	tural gas		Submit Savings Report
Details	Baseline summary			0
Energy and Water Weather and Independent	Performance period	t data summany		0
Savings Plan and Documents	Performance period	u data summary		v
Baseline Modeling	Performance period	d reporting Informati	ion	•
Performance	FIRST PAY-FOR-PERFORM	ANCE SECOND PAY-FO	R-PERFORMANCE	THIRD PAY-FOR-PERFORMANCE
Completed				Add non-routine event
	Pay-for-performance period	From 10-21-2022, to	MM/DD/YYYY	Non-routine event name
	Adjusted baseline electricity consumption (kWh)		Estimated	Tornado

• The start date of the pay for performance period should already be selected by the reviewer that approved your baseline. If you need this to be changed, please contact customer support.

Pay-for-performance period	From 10-21-2022, to	MM/D	D/YY	YY			Non-ro name	outine ev	rent
Adjusted baseline electricity consumption (kWh)		Octo s	ober	202 З	3 • w	т	< F	> S	
Reporting period electricity consumption (kWh)		1 8	2 9	3 10	4 11	5 12	6 13	7 14	
Non-routine adjustment (kWh)		15	16	17	18	19	20	21	
On-peak electricity savings (kWh)	-	29	30	31	1 a 10°	20	Res 7	AL OF	
Off-peak electricity savings (kWh)									
Total electricity savings (kWh)					_	-	Clear	OK	

You will need to select the end date for the pay for performance period.

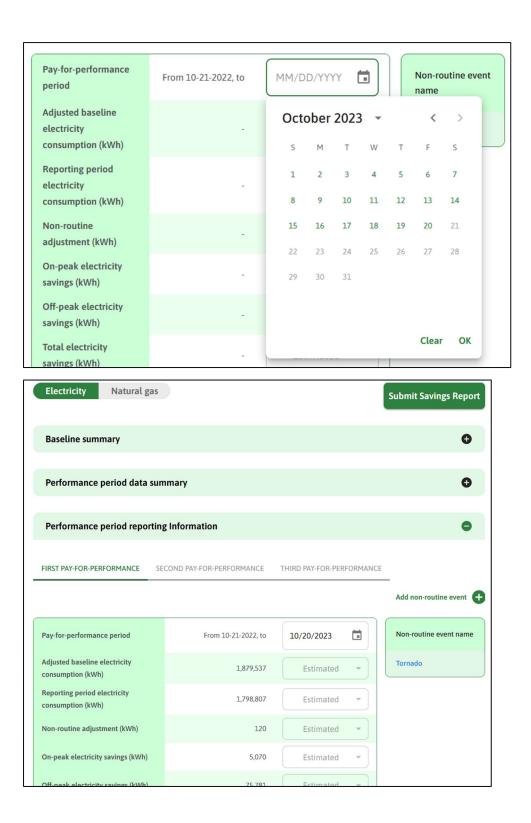
 The details of your pay for performance period should be automatically filled out below. Once you are satisfied, you can press the "Submit Savings Report" button on the top right, and your pay for performance report will be submitted.

			Submit Savings Report
Baseline summary			0
Performance period data su	mmary		0
Performance period reporti	ng Information		٥
FIRST PAY-FOR-PERFORMANCE	ECOND PAY-FOR-PERFORMANCE	THIRD PAY-FOR-PERFORMANCE	_
			Add non-routine event
			Add non-routine event
Pay-for-performance period	From 10-21-2022, to	10/20/2023	Non-routine event name
Pay-for-performance period Adjusted baseline electricity consumption (kWh)	From 10-21-2022, to 1,879,537	10/20/2023	
Adjusted baseline electricity			Non-routine event name
Adjusted baseline electricity consumption (kWh) Reporting period electricity	1,879,537	Estimated *	Non-routine event name
Adjusted baseline electricity consumption (kWh) Reporting period electricity consumption (kWh)	1,879,537	Estimated V	Non-routine event name

• When your pay for performance report has been approved, you will receive an email confirming that your information has been accepted.

14. Tracking Your Performance Before the First Performance Period ("Interim Savings Summary")

The portal can be used to track your energy savings progress before the first performance period. To do this, you can upload the data that you do have available. All you have to do is select the end date, and the table will auto-populate your energy savings and incentive progress.



15. Customer Support

If you need any help, please contact us at EPP Support at info@energyperformanceprogram.ca or 1-888-852-2440 (Monday to Friday 9am - 5pm EST).