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# ENERGY PERFORMANCE PROGRAM PORTAL USER GUIDE

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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:

- Register for the Program
- Create an account and select a role
- Upload an executed Participant Agreement (if you are a company administrator)
- Invite other users to your account (if you are a company administrator)
- Create facilities (if you are a company administrator)
- Complete information for the facility, upload electricity consumption and an electric utility bill and enroll the facility in the program

Within subsequent releases, you will have access to more features such as automated baseline energy modelling, energy savings and incentive calculations, access to data analytics and visualizations, and benchmarking. For the first release, these additional features will be delivered by email and other file types.

## 2. Role Selection

Within the portal, there are two different roles that can be selected for EPP program:

**Company Administrator:** If you will be responsible for creating the company account, uploading the executed Participant Agreement and inviting other users to access the account, please select Company Administrator. **Please note that only one account can be a company administrator for a company.** Additionally, that account cannot be a user for another company.

**User:** If you do not have these responsibilities, please select User, and the Company Administrator will invite you to the company to provide you with access.

Once you make your selection on role, you cannot change it. If you need assistance, please contact EPP Support at [info@energyperformanceprogram.ca](mailto:info@energyperformanceprogram.ca) or 1-888-852-2440 (Monday to Friday 9am - 5pm EST).

### Please choose **Company Administrator**, if

- you are main contact of the program
- you are able to upload the signed Participation Agreement
- you have the responsibility to invite others to access the portal to work for your company

### Please choose **User**, if

- you are invited to register by someone else in your company
- you are a third party to help the applicant to complete their application
- you are able to provide information for some specific facilities but not all facilities
- you may need to work on several company accounts

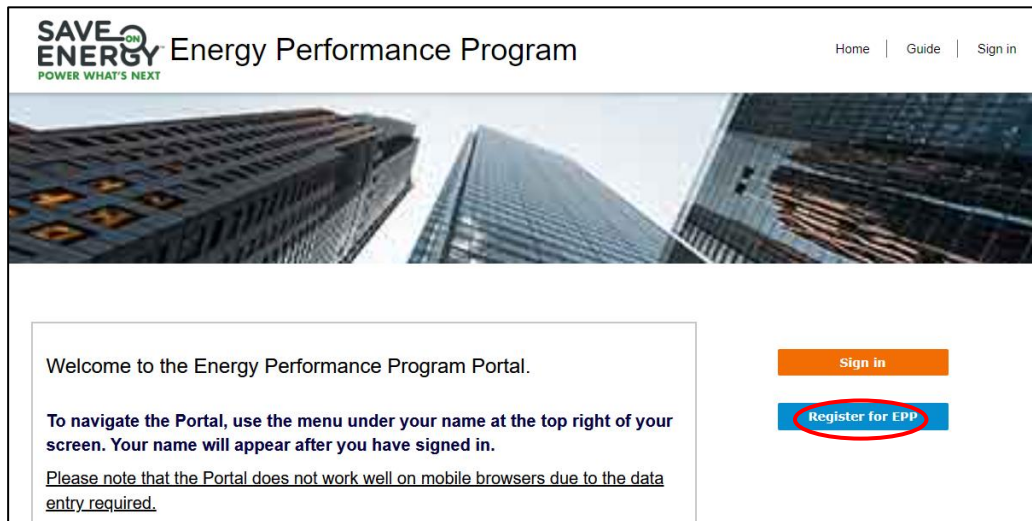
Please also refer to the figure below to choose the right role for you:

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

## 3. Creating Your EPP Account

### 3.1 Registering for an EPP Account

Visit [www.energyperformanceprogram.ca](http://www.energyperformanceprogram.ca) and click on "Register for EPP".

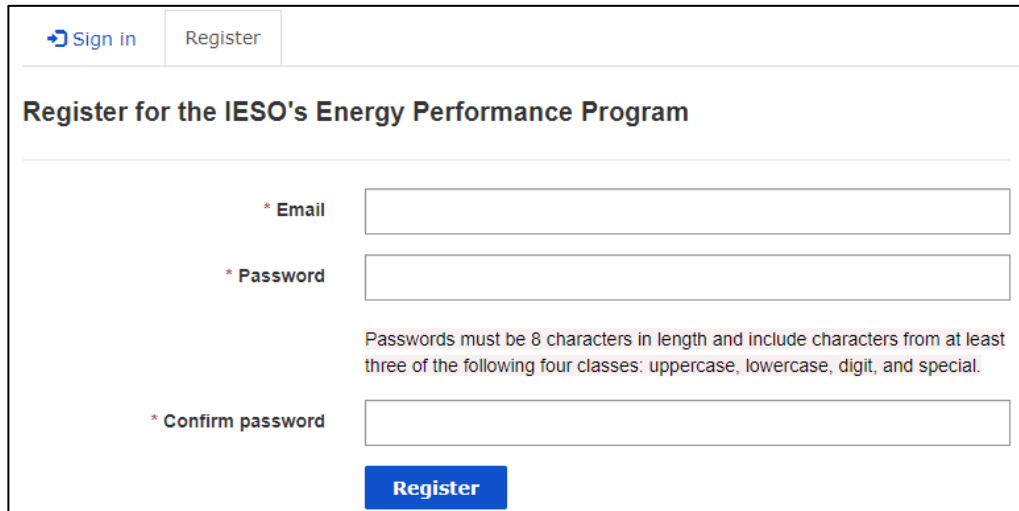


This will redirect you to the page 'Register for the IESO's Energy Performance Program', where you will create your EPP account.

### 3.2 Creating an EPP Account

Manually fill in each of the white cells with the required information:

- Provide an email address that will serve as the account username
- Enter a password for your account, ensuring password requirements are met
- Repeat this password, ensuring both passwords match



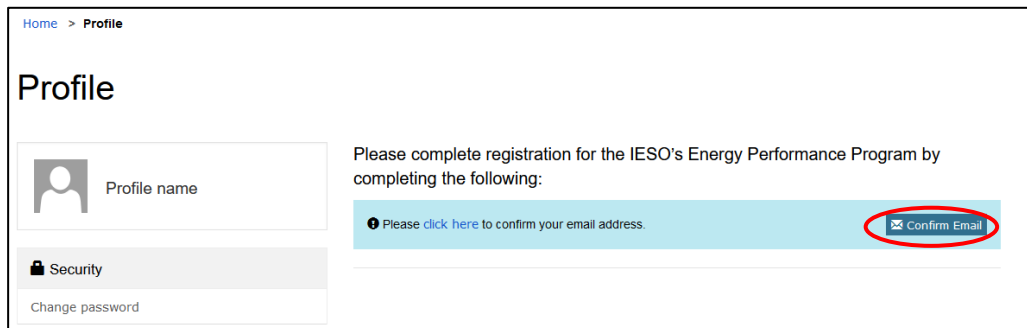
The screenshot shows a registration form with the following elements:

- Navigation links: [Sign in](#) and [Register](#)
- Section title: **Register for the IESO's Energy Performance Program**
- Input fields: **\* Email**, **\* Password**, and **\* Confirm password**
- Text below password fields: "Passwords must be 8 characters in length and include characters from at least three of the following four classes: uppercase, lowercase, digit, and special."
- Submit button: **Register**



Once white cells are filled, click "Register". This will redirect you to the EPP site.

### 3.3 Verifying Your Account

Confirm your email address by clicking "Confirm Email".



The screenshot shows a profile page with the following elements:

- Navigation: [Home](#) > [Profile](#)
- Section title: **Profile**
- Profile information:  Profile name
- Security section:  Security, Change password
- Registration instruction: "Please complete registration for the IESO's Energy Performance Program by completing the following:"
- Confirmation step: "Please [click here](#) to confirm your email address." with a **Confirm Email** button circled in red.

You will receive a confirmation email containing further instructions.

Locate the confirmation email in your Inbox and click "Complete Registration" or follow the link provided.

Check your Spam/Junk folders if you don't see the email in your Inbox.

Hello,

Your account requires confirmation. Please click the following link to complete the registration.

[Complete Registration](#)

Or you can copy the following URL and paste it into your web browser.

<https://www.energyperformanceprogram.ca/Account/Manage/ConfirmEmail?userId=d7777b9d-cdd0-ee11-904d-000d3af4f81a&code=scrib81XmshT9P3SVN7MNMu9muD%2B9FZCnnj1164YRPrtrPoVuTfh3s4BHbmt0%2FASmubnisz%2Be5bcl65MFWCHEAyRPPIbdYYhakhxtssWyyZvmlmd5OTOk95fH8061b%2BhljRfbzvd8NtsY6HTp1B62Pw3CgOwMEJGFmj4JxXCn6m1PPSw1grJ2VdWVRNd7zpx>

If you believe you received this email in error, please contact Customer Service for assistance.

The phone number is 1-888-852-2440 and the email is [info@energyperformanceprogram.ca](mailto:info@energyperformanceprogram.ca)

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.

Thank You,

Energy Performance Program

If you do not receive a confirmation email, please contact EPP Support at [info@energyperformanceprogram.ca](mailto:info@energyperformanceprogram.ca) or 1-888-852-2440 (Monday to Friday 9am - 5pm EST).


### 3.4 Completing Your Account Registration

Fill in each of the cells with the required information:


- First name
- Last name
- Business phone number
- Company name
- Company website (optional)
- Company head office address (including city, postal code, province and country)
- Role
- How you heard about the program (optional)

Home > Profile

## IESO's Energy Performance Program

 Profile name

---

 Security

Change password

Please complete registration for the IESO's Energy Performance Program by completing the following:

<b>First Name *</b> <input type="text"/>	<b>Last Name *</b> <input type="text"/>
<b>E-mail</b> <a href="mailto:Chenyang@enerva.ca">Chenyang@enerva.ca</a>	<b>Business Phone *</b> <input type="text"/> Provide a telephone number
<b>Company Name *</b> <input type="text"/>	<b>Company Web Site</b> <input type="text"/>
<b>Address *</b> <input style="width: 100%; height: 40px;" type="text"/>	
<b>City *</b> <input type="text"/>	
<b>Postal Code *</b> <input type="text"/>	

	<b>Province/State *</b> <input type="text"/>
	<b>Country *</b> <input type="text"/>
	<p><small>If you will be responsible for creating the company account and inviting other users to access the account, please select Company Administrator. Please note that only one account can be an administrator for a company. If you do not have these responsibilities, please select User, and the Company Administrator will invite you to the company to provide access. Once you make your selection, you can not change it. If you have any questions, please contact us at <a href="mailto:info@energyperformanceprogram.ca">info@energyperformanceprogram.ca</a></small></p>
	<b>Role *</b> <input type="text"/>
	<b>How did you hear about the program?</b> <input type="text"/>
	<input type="checkbox"/> I have read and agree to the provisions of the <a href="#">Portal Services Agreement</a> , which includes limitations on Enerva and IESO warranties and liability.
	<input type="checkbox"/> 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
	<input type="checkbox"/> I consent to being contacted by IESO or Enerva (IESO's Service Provider) by e-mail, 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
	<input type="button" value="Complete Registration"/>

Read and agree to all necessary information, then click "Complete Registration". A pop-up window will confirm the role selection.

You have selected Company Administrator as your role. This is the correct selection if you will be responsible for uploading the Participant Agreement for the company and inviting other Users to your company to assist with facility submission. If you will not be uploading the Participant Agreement for the company and inviting other Users to assist with facility submission, please select User. If you do cancel, and go back and select User, please note that you will need to wait until you are invited by a Company Administrator before you can begin work in the Portal. Please note that there is only one Company Administrator for every Company. Please press "OK" to continue as the Company Administrator. If you want to register as a User, please press "Cancel".

Ok

Cancel

You will be redirected to your profile page within the portal and will see the page below:

## Profile



Chenyang Zhang

Profile

Participant Agreement

Security

Change password

Thank you for registering with the EPP Portal.

**If you are a Company Administrator**, you can begin by reviewing the Participant Agreement, and uploading a signed copy. **To review the Participant Agreement, you need to go to "Participant Agreement" in the top right corner menu under your name.**

Only **after you upload the Participant Agreement** will you be allowed to start adding facilities. Once you add facilities, you can invite Users to assist with entering the information for the facility and submitting it to the program. To invite Users, you need to go to "User Access" in the top right corner under your name.

**If you are a User**, you will need to **wait until a Company Administrator invites you** to get access to specific facilities. Once you are invited to those facilities, you can assist with entering the information for the facility and submitting it to the program. **To view the facilities you have been invited to, you need to go to "Access Dashboard" in the top right corner menu under your name.**

If you wish to update your profile, you can do that on the screen below.

Your profile has been updated successfully.



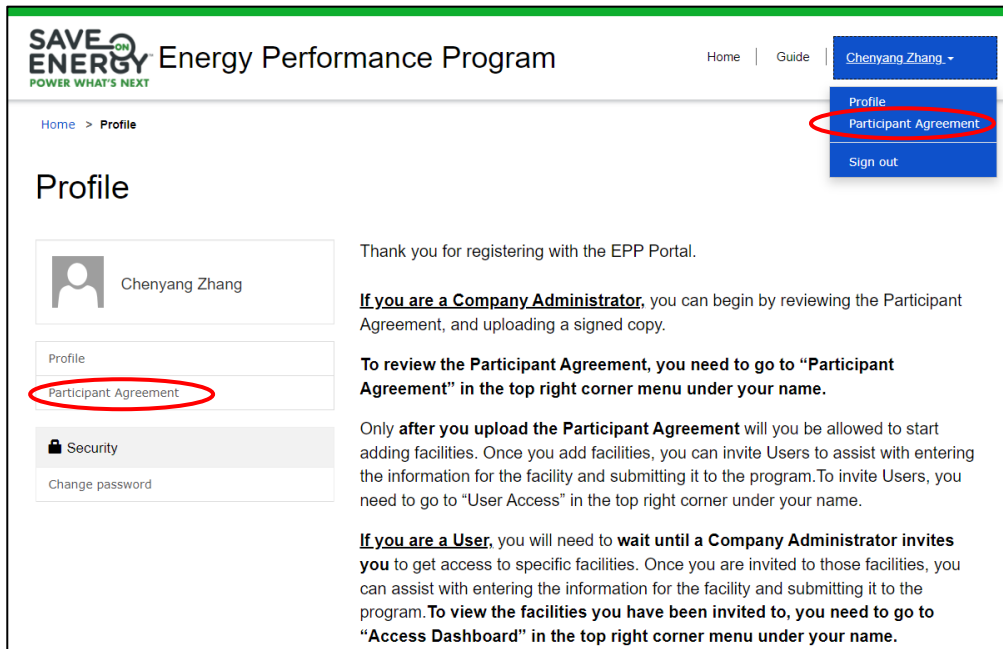
You can make changes to your account information if needed, under the profile tab, by clicking "Update Profile" at bottom.

## 4. Uploading Participant Agreement as a Company Administrator

As a Company Administrator you can upload the Participant Agreement and add new facilities. You can also invite users to your company account to work on specific facilities. The user will be able to add/edit facility components such as "Details" and "Electricity Consumption" for existing facilities, after the Company Administrator grants access.

The following outlines the steps necessary for a Company Administrator to upload the participation agreement and add new facilities:

### Step 1: Access "Participant Agreement"



The screenshot shows the 'SAVE ON ENERGY' logo with the tagline 'POWER WHAT'S NEXT' and the title 'Energy Performance Program'. The user's name 'Chenyang Zhang' is displayed in the top right corner. A dropdown menu is open, showing 'Profile', 'Participant Agreement' (circled in red), and 'Sign out'. The main content area is titled 'Profile' and includes a user profile card for 'Chenyang Zhang', a list of menu items ('Profile', 'Participant Agreement' circled in red, 'Security'), and a 'Change password' link. The text on the page provides instructions for both Company Administrators and Users regarding the Participant Agreement.

Thank you for registering with the EPP Portal.

**If you are a Company Administrator**, you can begin by reviewing the Participant Agreement, and uploading a signed copy.

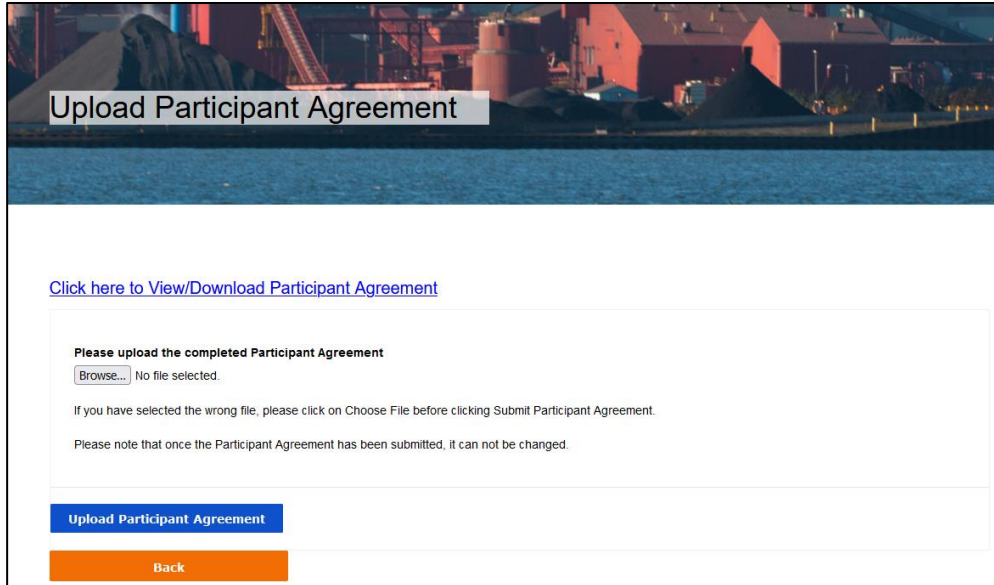
**To review the Participant Agreement, you need to go to "Participant Agreement" in the top right corner menu under your name.**

Only **after you upload the Participant Agreement** will you be allowed to start adding facilities. Once you add facilities, you can invite Users to assist with entering the information for the facility and submitting it to the program. To invite Users, you need to go to "User Access" in the top right corner under your name.

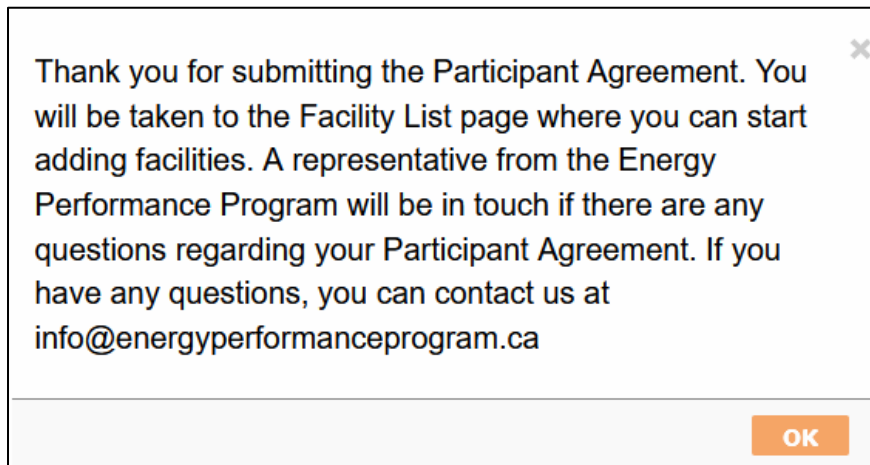
**If you are a User**, you will need to **wait until a Company Administrator invites you** to get access to specific facilities. Once you are invited to those facilities, you can assist with entering the information for the facility and submitting it to the program. **To view the facilities you have been invited to, you need to go to "Access Dashboard" in the top right corner menu under your name.**

**Step 2:** View and download the Participant Agreement at the link provided. Have the Participant Agreement signed by someone who has the authority to bind the company. Then, upload the signed Participant Agreement by clicking "Browse..." and submit by clicking "Upload Participant Agreement".





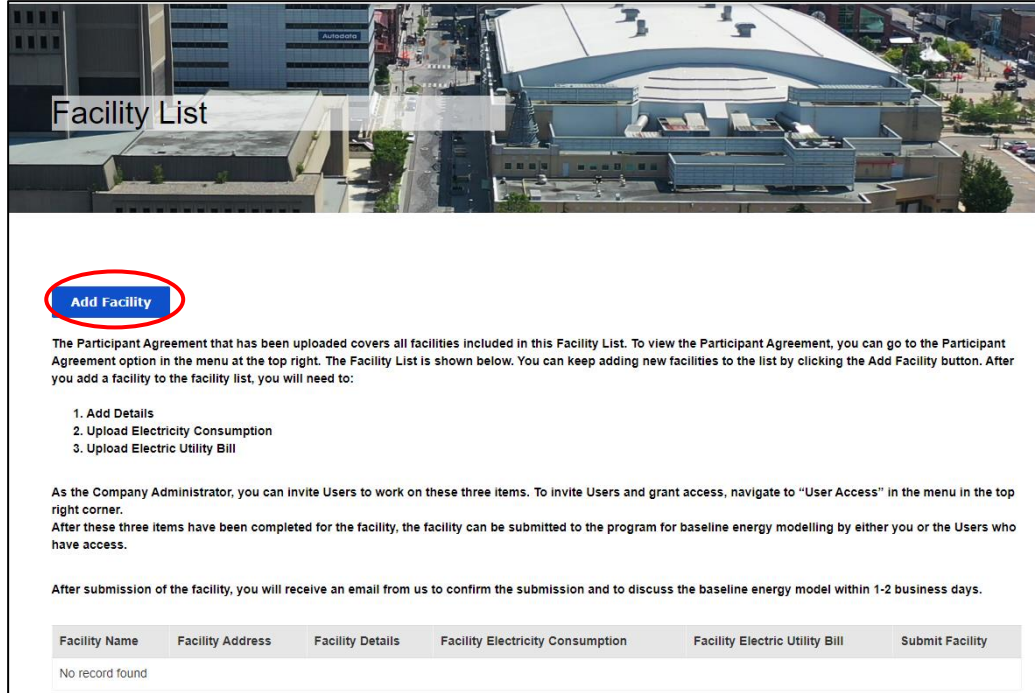
**Step 3:** With a successful upload, the following window will pop up. Click "OK" to proceed.



## 5. Adding Facilities and Facility Information as a Company Administrator

“Add Facility” page can only be accessed after the executed Participant Agreement has been uploaded. Once the Participant Agreement is uploaded, “Add Facility” page will pop up. You can also access it from the Profile page.

**Step 1:** Click “Add Facility”.



The screenshot shows a web interface for managing facilities. At the top, there is a header area with an aerial view of a city and the text "Facility List". Below this, a blue button labeled "Add Facility" is circled in red. The main content area contains the following text:

The Participant Agreement that has been uploaded covers all facilities included in this Facility List. To view the Participant Agreement, you can go to the Participant Agreement option in the menu at the top right. The Facility List is shown below. You can keep adding new facilities to the list by clicking the Add Facility button. After you add a facility to the facility list, you will need to:

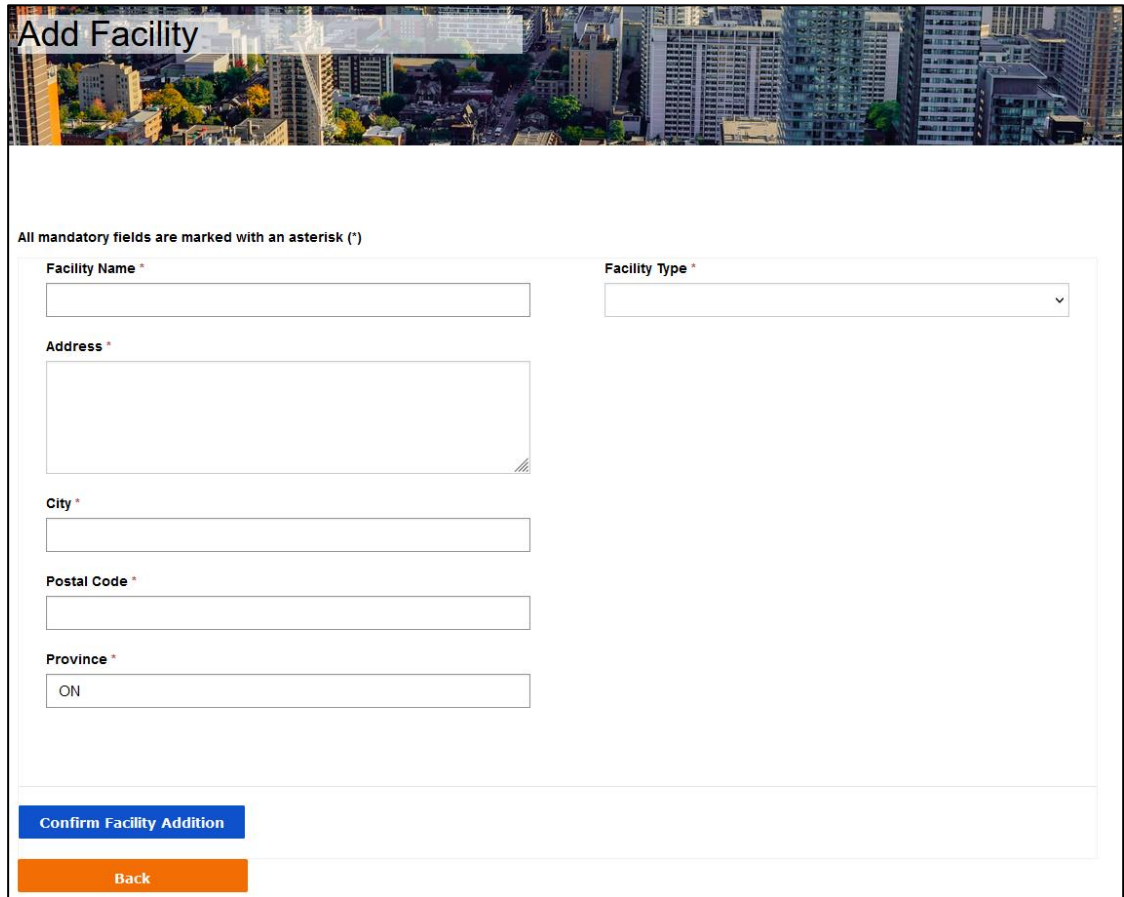
1. Add Details
2. Upload Electricity Consumption
3. Upload Electric Utility Bill

As the Company Administrator, you can invite Users to work on these three items. To invite Users and grant access, navigate to “User Access” in the menu in the top right corner. After these three items have been completed for the facility, the facility can be submitted to the program for baseline energy modelling by either you or the Users who have access.

After submission of the facility, you will receive an email from us to confirm the submission and to discuss the baseline energy model within 1-2 business days.

Facility Name	Facility Address	Facility Details	Facility Electricity Consumption	Facility Electric Utility Bill	Submit Facility
No record found					

**Step 2:** Fill in all fields and click "Confirm Facility Addition".



**Add Facility**

All mandatory fields are marked with an asterisk (\*)

**Facility Name \***

**Facility Type \***

**Address \***

**City \***


**Postal Code \***

**Province \***

[Confirm Facility Addition](#)

[Back](#)

**Step 3:** Add "Facility Details", "Facility Electricity Consumption" and "Facility Electric Utility Bill".



### Facility List

**Add Facility**

The Participant Agreement that has been uploaded covers all facilities included in this Facility List. To view the Participant Agreement, you can go to the Participant Agreement option in the menu at the top right. The Facility List is shown below. You can keep adding new facilities to the list by clicking the Add Facility button. After you add a facility to the facility list, you will need to:

1. Add Details
2. Upload Electricity Consumption
3. Upload Electric Utility Bill

As the Company Administrator, you can invite Users to work on these three items. To invite Users and grant access, navigate to "User Access" in the menu in the top right corner. After these three items have been completed for the facility, the facility can be submitted to the program for baseline energy modelling by either you or the Users who have access.

After submission of the facility, you will receive an email from us to confirm the submission and to discuss the baseline energy model within 1-2 business days.

Facility Name	Facility Address	Facility Details	Facility Electricity Consumption	Facility Electric Utility Bill	Submit Facility
Test Facility <a href="#">Edit</a>   <a href="#">View</a>	111 Test Avenue	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	

Adding "Facility Details": fill in all required fields and click "Save Facility Details".

Facility Details

All mandatory fields are marked with an asterisk (\*)

Is the facility equipped with a revenue-grade meter and the electricity consumption data collected from the same meter? \*

Yes  No

Is there on-site generation that needs to be removed from the electricity consumption entered? \*

Facility Number of Storeys \*

Facility Square Footage \*

Are there any unique features of your facility that may impact its energy use that we should be aware of? \*

NAICs Code

Facility Year of Construction \*

Facility Space Cooling \*

Facility Space Heating \*

Facility Water Heating \*

Facility Space Cooling Technology \*

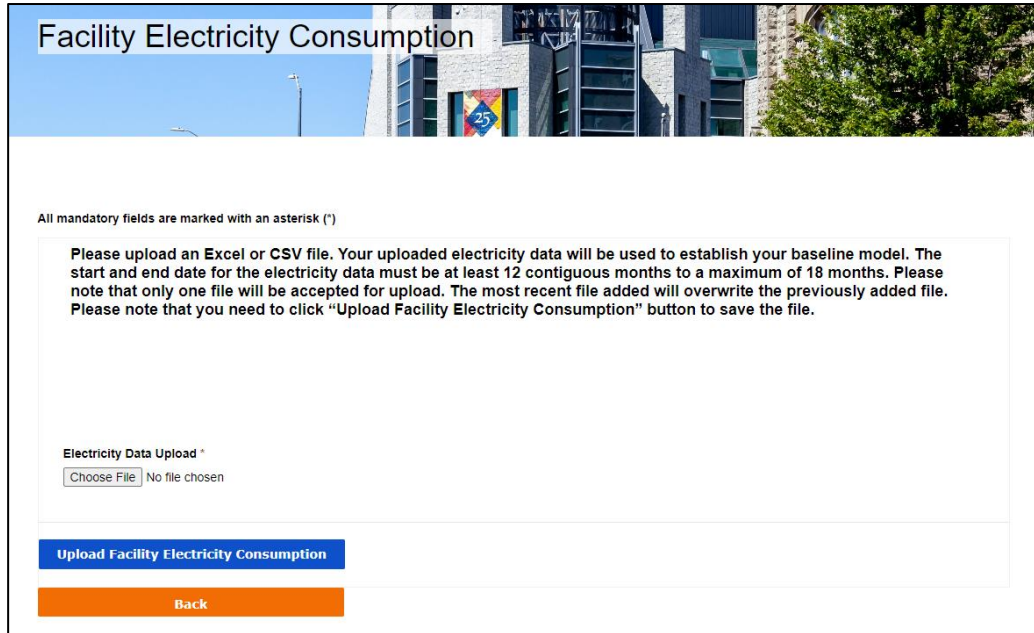
Facility Space Heating Technology \*

Facility Domestic Water Heating Technology \*

Save Facility Details

Back

Adding "Facility Electricity Consumption": upload the required document and then click "Upload Facility Electricity Consumption"



Facility Electricity Consumption

All mandatory fields are marked with an asterisk (\*)

Please upload an Excel or CSV file. Your uploaded electricity data will be used to establish your baseline model. The start and end date for the electricity data must be at least 12 contiguous months to a maximum of 18 months. Please note that only one file will be accepted for upload. The most recent file added will overwrite the previously added file. Please note that you need to click "Upload Facility Electricity Consumption" button to save the file.

Electricity Data Upload \*

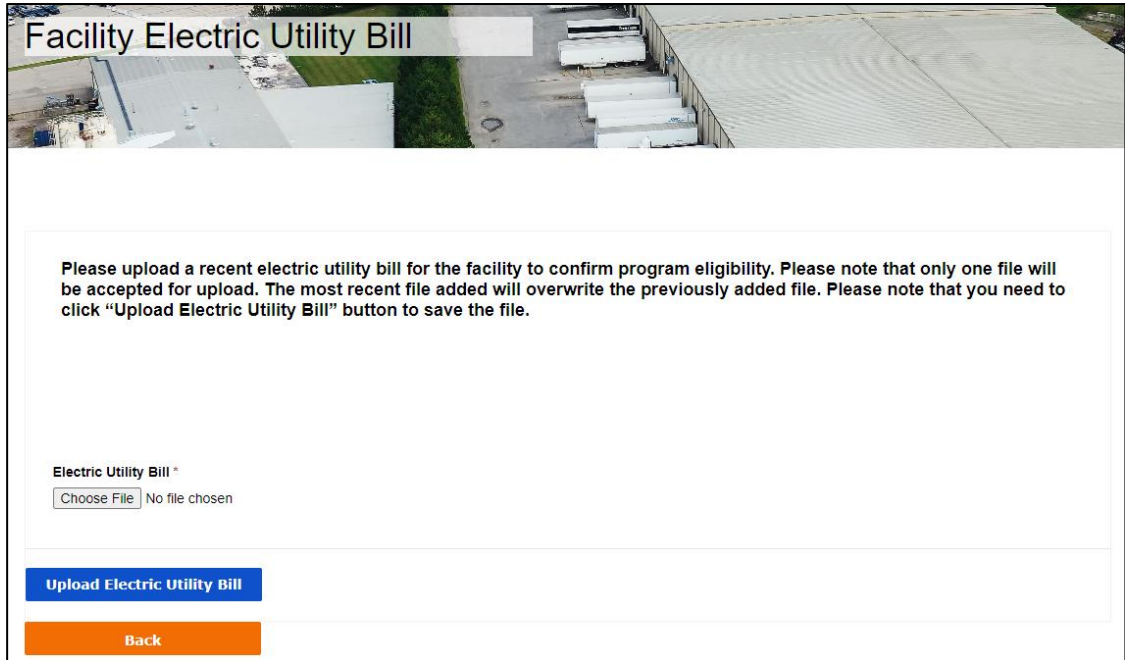
Choose File No file chosen

Upload Facility Electricity Consumption

Back



Adding "Facility Electric Utility Bill": upload the required document and then click "Upload Electric Utility Bill".



**Facility Electric Utility Bill**

Please upload a recent electric utility bill for the facility to confirm program eligibility. Please note that only one file will be accepted for upload. The most recent file added will overwrite the previously added file. Please note that you need to click "Upload Electric Utility Bill" button to save the file.

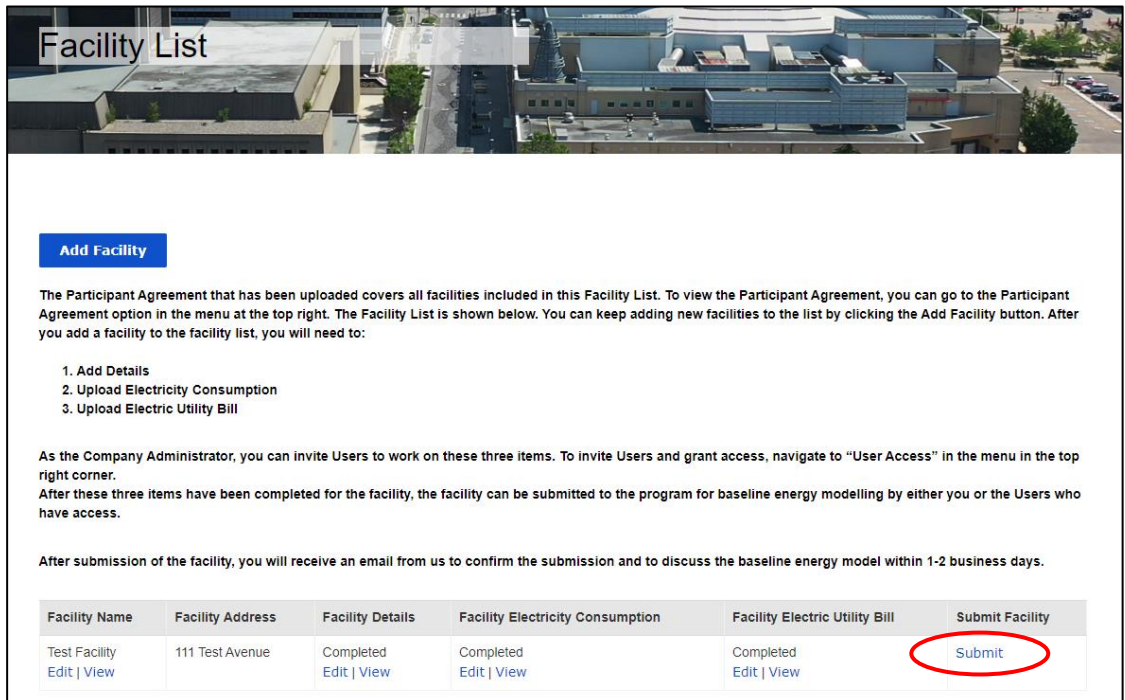
Electric Utility Bill \*

Choose File | No file chosen

**Upload Electric Utility Bill**

**Back**

**Step 4:** All fields can be edited or viewed after completion. Click "Submit".



**Facility List**

**Add Facility**

The Participant Agreement that has been uploaded covers all facilities included in this Facility List. To view the Participant Agreement, you can go to the Participant Agreement option in the menu at the top right. The Facility List is shown below. You can keep adding new facilities to the list by clicking the Add Facility button. After you add a facility to the facility list, you will need to:

1. Add Details
2. Upload Electricity Consumption
3. Upload Electric Utility Bill

As the Company Administrator, you can invite Users to work on these three items. To invite Users and grant access, navigate to "User Access" in the menu in the top right corner. After these three items have been completed for the facility, the facility can be submitted to the program for baseline energy modelling by either you or the Users who have access.

After submission of the facility, you will receive an email from us to confirm the submission and to discuss the baseline energy model within 1-2 business days.

Facility Name	Facility Address	Facility Details	Facility Electricity Consumption	Facility Electric Utility Bill	Submit Facility
Test Facility Edit   View	111 Test Avenue	Completed Edit   View	Completed Edit   View	Completed Edit   View	<b>Submit</b>

**Step 5: Agree to confirmation and click "Submit"**

You have completed the facility details and uploaded the electricity consumption and electric utility bill. Please confirm that you wish to submit this facility to the program.

[Submit](#)

[Back](#)

**Step 6: Done! You will see the following notification. Click "Back" to go to the facility list. It will be shown as "Completed".**

Thank you for submitting the facility to the Energy Performance Program. A program representative will be in touch with you to discuss your baseline energy model and any other items. You can keep adding and submitting more facilities to the Energy Performance Program. If you have any questions, please contact us at [info@energyperformanceprogram.ca](mailto:info@energyperformanceprogram.ca) x

[Back](#)



## 6. Granting User Access as a Company Administrator

The Company Administrator can grant user access so that users will be able to add facility information (Facility Details, Facility Electricity Consumption, Facility Electric Utility Bill) to any existing facility created by the Company Administrator.

**Step 1:** Access "User Access" page.

SAVE ON ENERGY Energy Performance Program  
POWER WHAT'S NEXT

Home | Guide | Chenyang Zhang ▾

Home > Profile

### Profile

Chenyang Zhang

- Profile
- User Access
- Participant Agreement
- Facility List

Security  
Change password

**First Name \***  
Chenyang

**Last Name \***  
Zhang

**E-mail**  
Chenyang@enerva.ca

**Business Phone \***  
12345678900

**Company Name \***  
Test Company

**Company Web Site**

**Address \***  
111 Test Road

**Step 2:** Click "Add/Invite User".

### User Access

Add/Invite User

User	Participant Agreement	Facility
No record found		

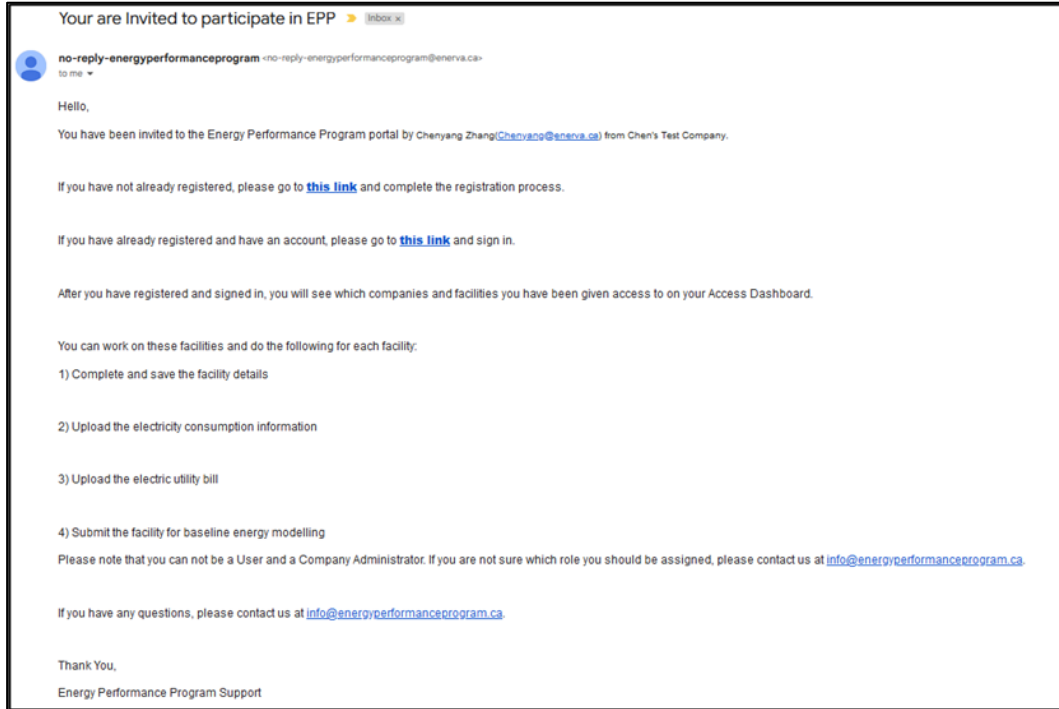
**Step 3:** Add invited user email and click "Submit".

Add Invited User Email \*

Submit

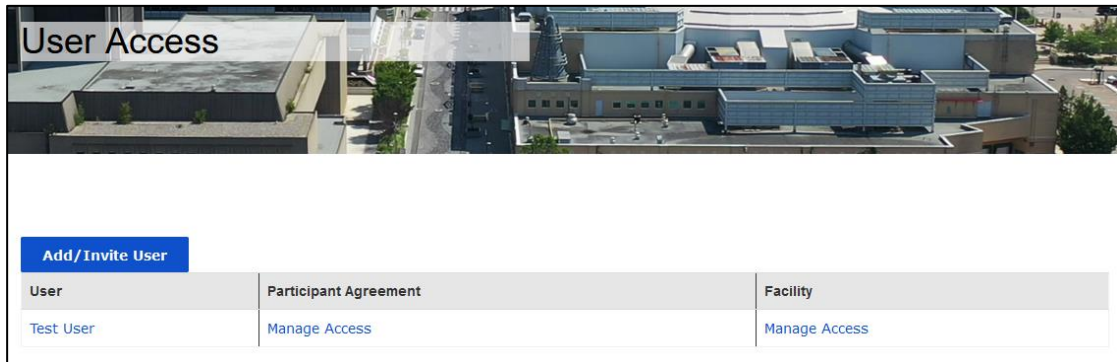
Back

**Step 4:** The invited user will receive a notification email as showing below. The invited user can register if they do not have EPP account yet or log in if they have already have one.



**Step 5:** The invited user will be shown under the "User" tab. Click "Manage Access" under "Participant Agreement" or "Facility" to grant certain access rights to the user. The facility needs to be added before granting access to any user to work on it.

The name under user is clickable as a blue link if the invited user has already registered as shown below. Otherwise, it will show a grey email address, which means the user has not registered yet.



**Step 6:** Check the box to grant access, then click "Submit".

Grant/provide access to view the Participant Agreement  


---

Submit

---

Back

Select Facility to give access:

Facility	
<input type="checkbox"/>	Test Facility
<input type="checkbox"/>	Test Facility 2

---

Submit

---

Back

**Step 7:** Done! You can see what access the user has by looking at the columns beside their name. With the "Participant Agreement", the user will be able to view the uploaded executed copy if they have access. The list of facilities they have been given access to is listed in the "Facility" column. If needed, you can also cancel the access by clicking "Manage Access".

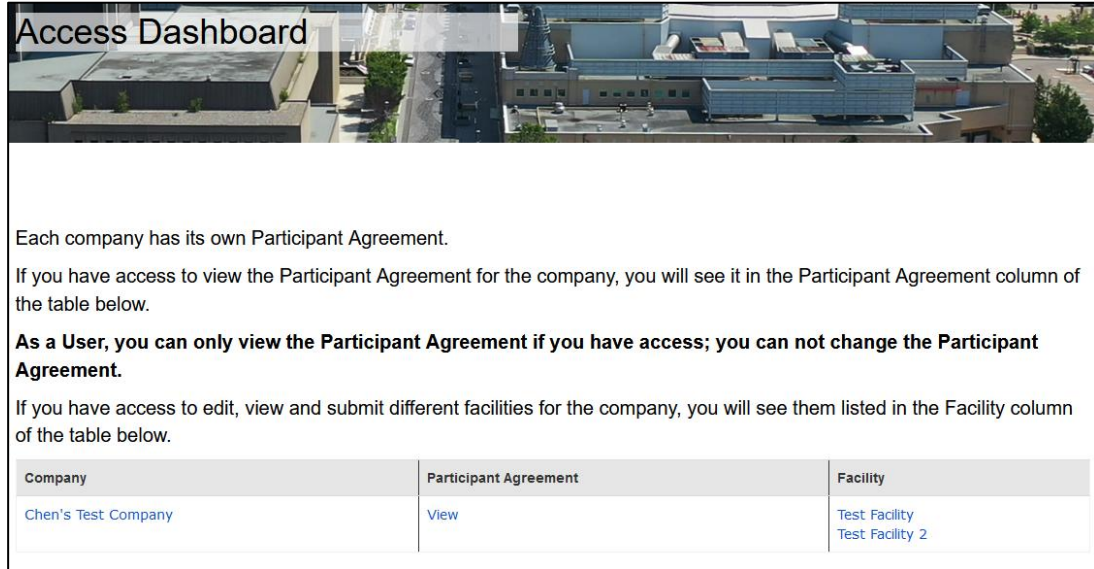
Add/Invite User

User	Participant Agreement	Facility
Test User	Access Granted <a href="#">Manage Access</a>	Test Facility  <a href="#">Manage Access</a>

## 7. Adding Facility Information as a User

The User can only add facility information after the Company Administrator has granted access.

**Step 1:** Access "Access Dashboard". You can access all the facilities and Participant Agreements you were granted access for various companies.



Each company has its own Participant Agreement.

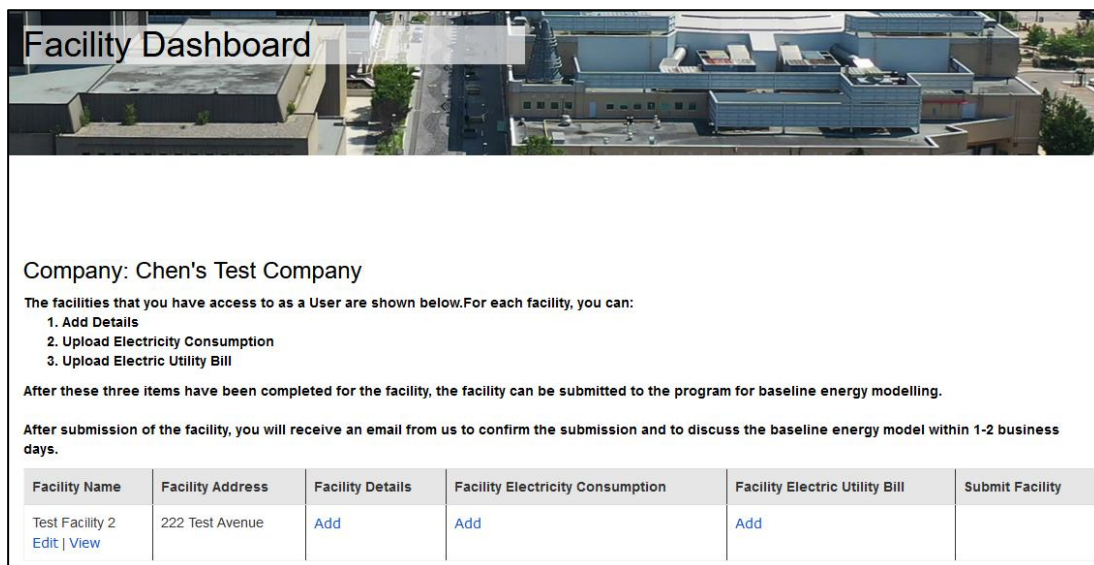
If you have access to view the Participant Agreement for the company, you will see it in the Participant Agreement column of the table below.

**As a User, you can only view the Participant Agreement if you have access; you can not change the Participant Agreement.**

If you have access to edit, view and submit different facilities for the company, you will see them listed in the Facility column of the table below.

Company	Participant Agreement	Facility
<a href="#">Chen's Test Company</a>	<a href="#">View</a>	<a href="#">Test Facility</a> <a href="#">Test Facility 2</a>

**Step 2:** Click any facility you want to view or edit. You can view or edit any information completed by the Company Administrator or other Users and add new information if there are blank fields. These are the same as the steps in Section 5. Either a User or a Company Administrator can submit a facility once all mandatory fields have been filled in.



Company: Chen's Test Company

The facilities that you have access to as a User are shown below. For each facility, you can:


1. Add Details
2. Upload Electricity Consumption
3. Upload Electric Utility Bill

After these three items have been completed for the facility, the facility can be submitted to the program for baseline energy modelling.

After submission of the facility, you will receive an email from us to confirm the submission and to discuss the baseline energy model within 1-2 business days.

Facility Name	Facility Address	Facility Details	Facility Electricity Consumption	Facility Electric Utility Bill	Submit Facility
<a href="#">Test Facility 2</a> <a href="#">Edit   View</a>	222 Test Avenue	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	

**Step 3:** Once the facility has been submitted, it cannot be changed within the portal.



Facility Dashboard

Company: Chen's Test Company

The facilities that you have access to as a User are shown below. For each facility, you can:

1. Add Details
2. Upload Electricity Consumption
3. Upload Electric Utility Bill

After these three items have been completed for the facility, the facility can be submitted to the program for baseline energy modelling.

After submission of the facility, you will receive an email from us to confirm the submission and to discuss the baseline energy model within 1-2 business days.

Facility Name	Facility Address	Facility Details	Facility Electricity Consumption	Facility Electric Utility Bill	Submit Facility
Test Facility 2 <a href="#">Edit</a>   <a href="#">View</a>	222 Test Avenue	Completed <a href="#">Edit</a>   <a href="#">View</a>	Completed <a href="#">Edit</a>   <a href="#">View</a>	Completed <a href="#">Edit</a>   <a href="#">View</a>	<a href="#">Submit</a>

If you need to make a change after you have submitted a facility, please contact EPP Support at [info@energyperformanceprogram.ca](mailto:info@energyperformanceprogram.ca) or 1-888-852-2440 (Monday to Friday 9am - 5pm EST).