



RETROFIT PROGRAM

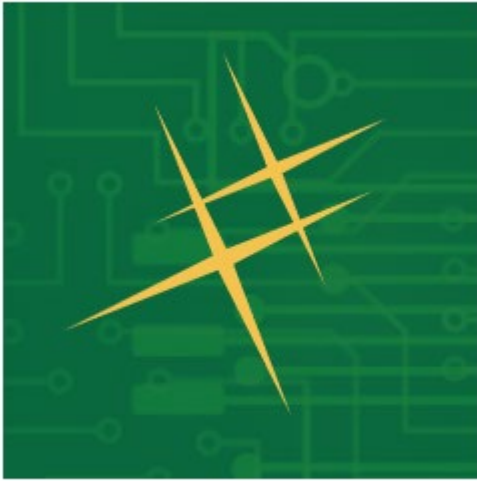
DIGITAL USER GUIDE:
FOR APPLICANTS AND APPLICANT
REPRESENTATIVES

April 2022

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Getting Started

RETROFIT PROGRAM ROLES

There are several roles involved in creating and reviewing a Retrofit project application and post-project submission.

Role	Description
Applicant	<p>The Applicant is the Retrofit project owner. They create the application and post-project submission or assign an Applicant Representative to create them on their behalf. They also accept the terms and conditions of the Participant Agreement when they submit their application.</p> <p>Only the Applicant can submit applications or post-project submissions.</p>
Applicant Representative (App Rep)	<p>An Applicant Representative is an <i>optional</i> proxy who creates or assists with the application and post-project submission on the Applicant's behalf.</p> <p>An Applicant Representative cannot submit applications or post-project submissions.</p>
Save on Energy Service Provider Analyst	<p>The Save on Energy Service Provider Analyst manages Retrofit projects for the IESO. This role is sometimes also referred to as Save on Energy Representative or Technical Reviewer.</p> <p>They review and provide final approval on all applications and post-project submissions.</p>

RETROFIT PROGRAM PROCESS

To receive a project incentive through the Retrofit program, an applicant will go through **three steps**.

First, the **pre-project application** is submitted by the applicant, via the Retrofit portal, to the Save on Energy Technical Reviewer to be reviewed.

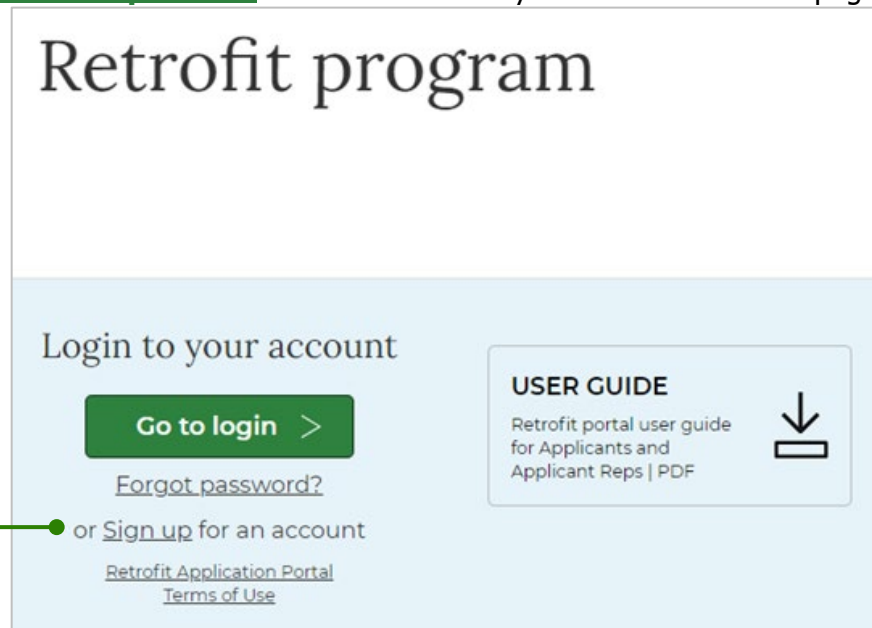
Once the project is pre-approved and the energy-efficiency project work is completed, a **post-project submission** is submitted to the Save on Energy Technical Reviewer for review.

Once the application is post-project approved an invoice is submitted via the Retrofit portal, the savings can be claimed and the project **incentive is issued**.

REGISTERING FOR THE RETROFIT PROGRAM

As a new **Applicant** or **Applicant Representative** you will need to register for a Save on Energy Retrofit account.

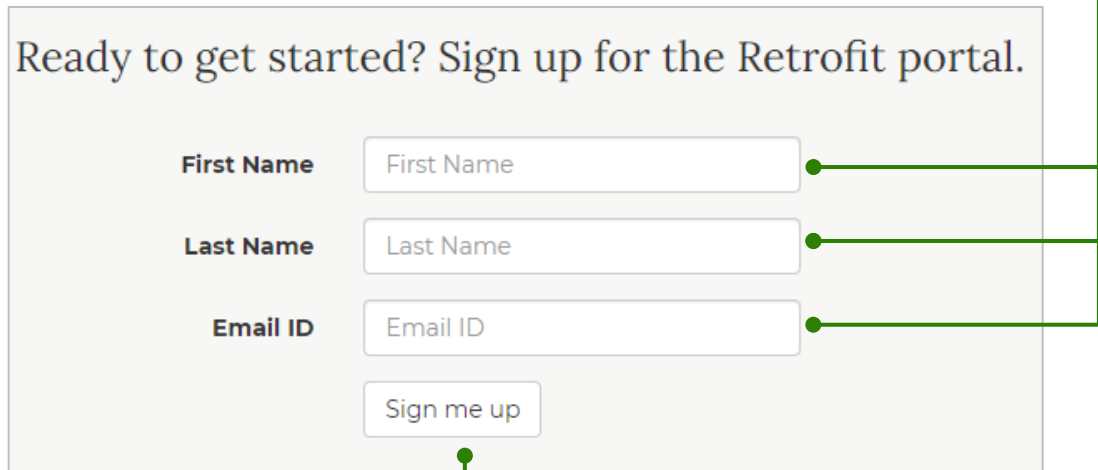
01 Open www.retrofitportal.ca. This URL will take you to the Retrofit webpage.



02 Click **Sign Up** for an account.

REGISTERING FOR THE RETROFIT PROGRAM

03 Enter your **first** and **last name** and **email address**.



Ready to get started? Sign up for the Retrofit portal.

First Name

Last Name

Email ID

04 Click **Sign Me Up**.

05 Retrieve the email that will be automatically sent from noreply@ieso.ca.

i Note: If you don't see the email in your inbox, try checking your junk or spam folder.

REGISTERING FOR THE RETROFIT PROGRAM

06 In the email from noreply@ieso.ca click **Activate Account**.

Dear Frank,

The IESO is using Okta to manage their web applications. This means you can conveniently access all the applications you normally use, through a single, secure home page; otherwise known as the IESO Gateway.

The IESO has created an account for you.

Your unique username is: **example@bellnet.ca**

****Please be sure to note this down as you will be using it to login to IESO Gateway going forward.**

Click the '**Activate Account**' button below to complete the set-up of your account.

Activate Account

Or copy and paste the below link into your browser:

<https://gateway.ieso.ca/welcome/wXwnfikF47RgwzaEARIN>

Please note, this link expires in 90 days.

What happens when I click on the account activation button?

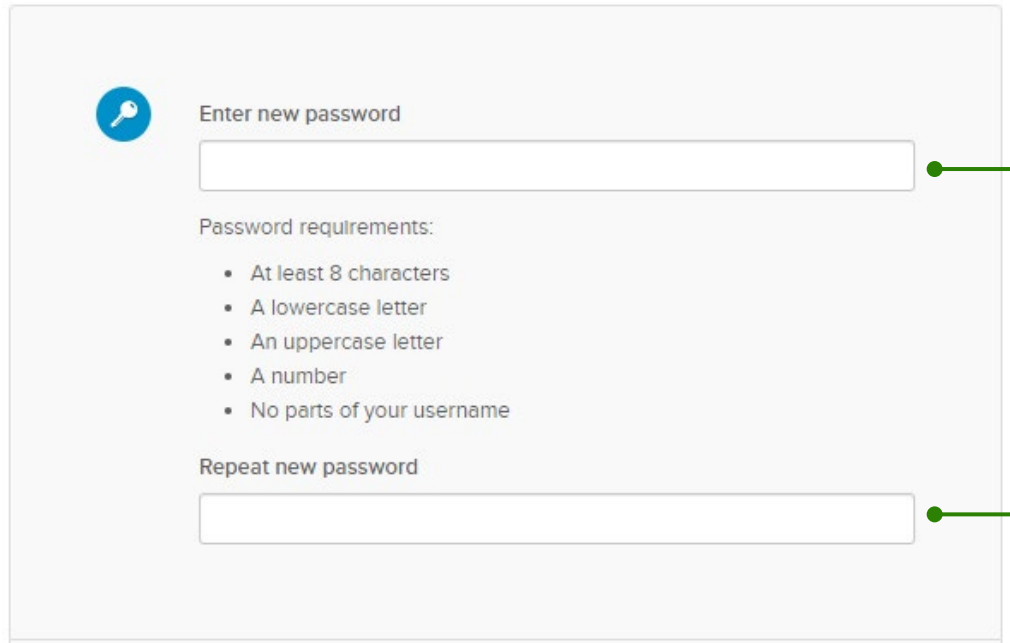
You will be directed to the account set up page where you will finalize your account details. This includes setting a new password and multifactor options for your account. Once completed, you will be able to access your IESO Gateway applications.

If you experience difficulties completing your activation, please don't hesitate to contact us.

This is an automatically generated message. Replies are not monitored or answered.

REGISTERING FOR THE RETROFIT PROGRAM

07 Enter a **password**, repeat this password.



The screenshot shows a user interface for creating a new password. It features a blue key icon on the left. The main heading is "Enter new password" above a text input field. Below this is a section titled "Password requirements:" followed by a bulleted list: "At least 8 characters", "A lowercase letter", "An uppercase letter", "A number", and "No parts of your username". At the bottom, there is a heading "Repeat new password" above another text input field. A green line with dots at the end of the input fields highlights the password entry area.

REGISTERING FOR THE RETROFIT PROGRAM

08 Configure your required Multifactor Authentication (MFA) Option by clicking on **Configure Factor**.

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Powering Tomorrow

Set up multifactor authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account

Setup required

- Security Question**
Use the answer to a security question to authenticate.

[Configure factor](#)

09 Choose a secret question and type an answer to it, then click on **Save**. Please note that answers are case sensitive.

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Setup secret question authentication

What is your favorite security question? ▾

Answer

[Save](#)

[Back to factor list](#)

REGISTERING FOR THE RETROFIT PROGRAM

- 10** *OPTIONAL* - Configure additional factors, such as Okta Verify, SMS Authentication, or Voice Call Authentication, by clicking on the **Setup** button under the desired factor.

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Set up multifactor authentication

You can configure any additional optional factor or click finish

Enrolled factors

- Security Question

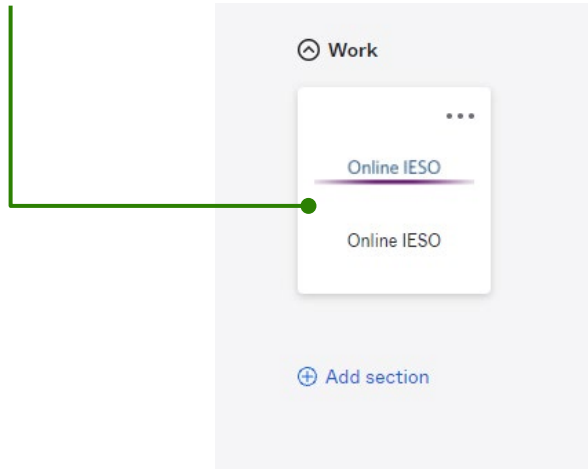
Additional optional factors

- Okta Verify
Use a push notification sent to the mobile app.
- SMS Authentication
Enter a single-use code sent to your mobile phone.
- Voice Call Authentication
Use a phone to authenticate by following voice instructions.

REGISTERING FOR THE RETROFIT PROGRAM

11 Once MFA factors are created, click on the **Finish** button to be directed to the list of systems to which you have access. They are presented by tiles, e.g., **Online IESO**.

12 Click **Online IESO**.



13 Click **Register for Retrofit**.

Welcome

Welcome to the IESO Programs dashboard. Please select the program you wish to participate in below to proceed to the appropriate site.

<p>FIT-microFIT Supplier</p>  <p>Register Supplier Contact</p> <p><i>The Feed-In Tariff (FIT) Program was developed to encourage and promote greater use of renewable energy sources. The microFIT Program supports the development of small or "micro" renewable electricity generation projects (10 kilowatts (kW) or less in size) such as solar panel installations.</i></p>	<p>Industrial Energy Efficiency Program</p>  <p>Register for Industrial Energy Efficiency Program</p> <p><i>The Save on Energy Industrial Energy Efficiency Program (IEEP) is a new program for large industrial consumers in Ontario. It provides financial incentives to implement projects that deliver electricity savings through upgrading of industrial processes. The IEEP is intended to support large, complex, customer-driven solutions that result in verifiable electricity system benefits from implementing proven, commercially available technologies.</i></p>	<p>Retrofit</p>  <p>Register for Retrofit</p> <p><i>The Retrofit program is designed to provide a variety of options for businesses, so you can find the right fit for your operations, regardless of your industry.</i></p>
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REGISTERING FOR THE RETROFIT PROGRAM

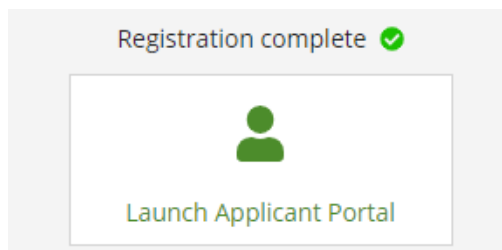
14 Complete the mandatory fields in the **Retrofit Registration**.

The screenshot shows the 'Register for Retrofit' form with the following fields and callouts:

- Enter a contact number.** Points to the **Phone Number *** field.
- Complete the address section.** Points to the **Address 1 *** field.
- Select the account type. You can choose Applicant, Applicant Rep, or both.** Points to the **Account Type *** section, which includes checkboxes for **Applicant** and **Applicant Representative**.
- Select where you heard about the program.** Points to the **Where did you hear about the Save on Energy Program? *** dropdown menu.
- COMPLETE REGISTRATION** button is highlighted in green.

15 Click **Complete Registration**.

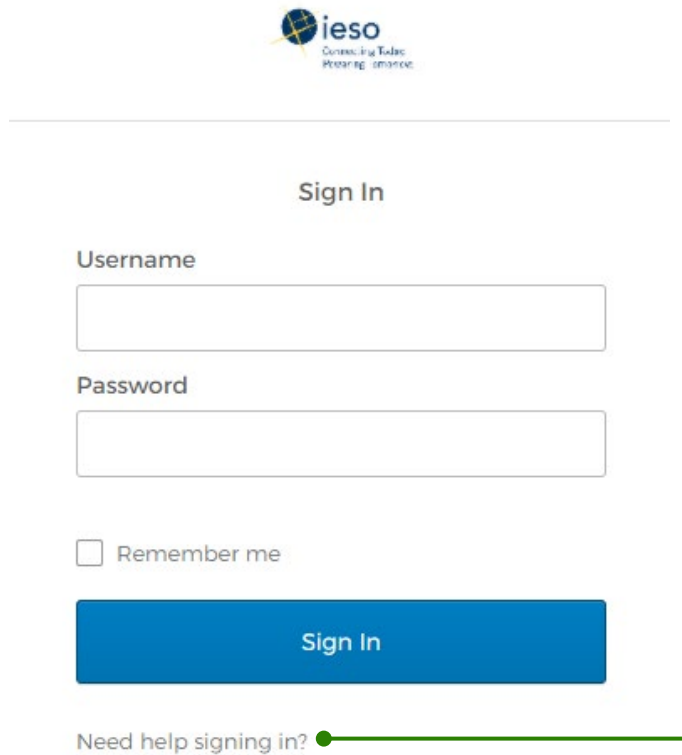
16 Click **Launch Applicant Portal**. This opens up the portal and your **Save on Energy Retrofit program registration is now complete**.



SELF-SERVICE PASSWORD RESET

If all requirements beginning on page 6 are in place and you are still having issues logging in, you can reset your password using the **Self-Service password reset**.

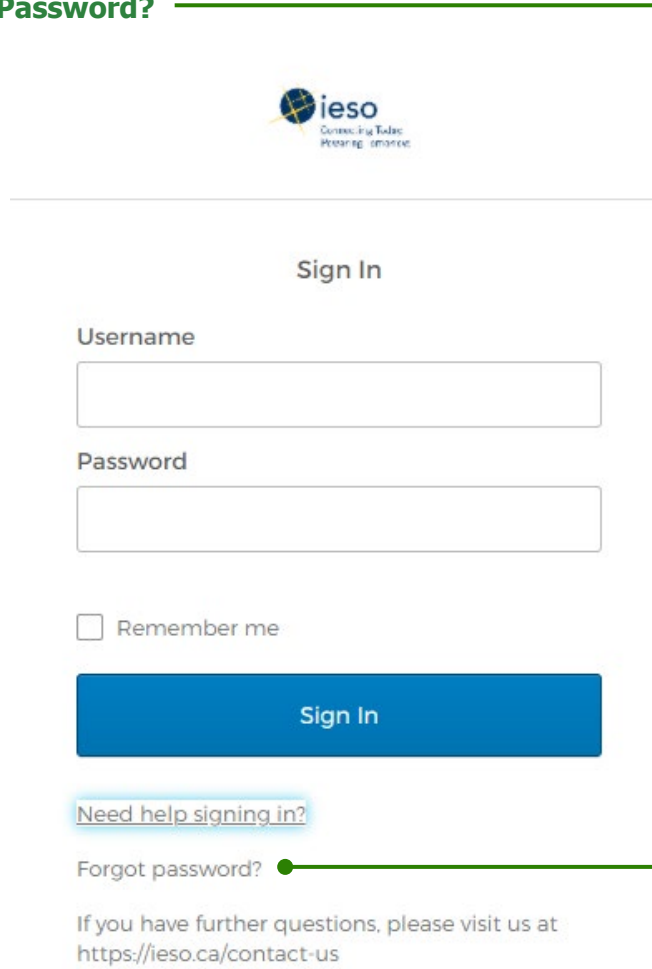
01 Under the **Sign In** button, click on **Need help signing in?**



The screenshot shows the IESO Sign In page. At the top center is the IESO logo with the tagline "Connecting Today. Preparing Tomorrow." Below the logo is a horizontal line, followed by the text "Sign In". Underneath are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". At the bottom of the form is a blue button labeled "Sign In". Below the button is a link that says "Need help signing in?". A green callout box with a line pointing to the link is overlaid on the right side of the page.

SELF-SERVICE PASSWORD RESET


02 Click on **Forgot Password?**



The screenshot shows the IESO Sign In page. At the top center is the IESO logo with the tagline "Connecting Today. Powering Tomorrow." Below the logo is the heading "Sign In". There are two input fields: "Username" and "Password". Below these is a checkbox labeled "Remember me". A blue "Sign In" button is positioned below the checkbox. A green box highlights the "Forgot Password?" link, which is located below the "Need help signing in?" link. The "Forgot Password?" link has a small green dot next to it. At the bottom of the page, there is a note: "If you have further questions, please visit us at <https://ieso.ca/contact-us>".

SELF-SERVICE PASSWORD RESET

- 03** Enter your email address and choose how you wish to reset your password by clicking on either **Reset Via SMS** or **Reset via Email**.


Connecting Today.
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Reset Password

Email or Username

SMS can only be used if a mobile phone number has been configured.

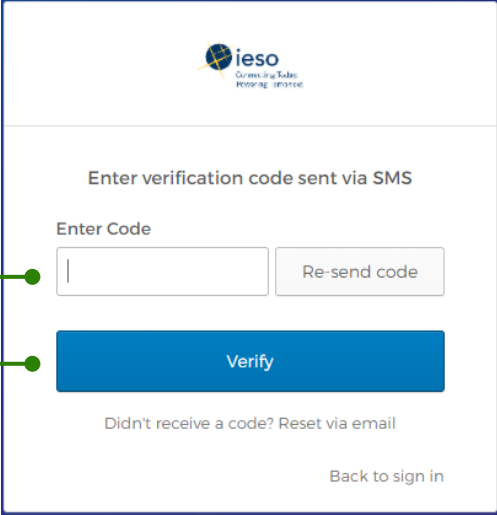
[Reset via SMS](#)

[Reset via Email](#)

[Back to sign in](#)

SELF-SERVICE PASSWORD RESET

04 If you selected **Reset Via SMS**, enter the verification code sent by text message and click **Verify**.



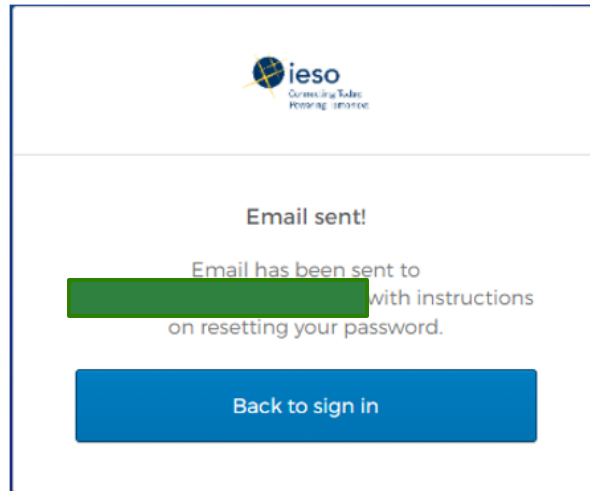
The screenshot shows the IESO password reset verification interface. At the top is the IESO logo with the tagline "Creating Today's Powering Tomorrow". Below the logo, the text "Enter verification code sent via SMS" is displayed. Underneath, there is a label "Enter Code" above a text input field. To the right of the input field is a "Re-send code" button. Below the input field is a large blue "Verify" button. At the bottom of the form, there is a link that says "Didn't receive a code? Reset via email" and a "Back to sign in" link. A green line with two dots points to the input field and the "Verify" button, indicating the steps to follow.



Note: If you do not receive the SMS verification code via text message, select **Reset Via Email**.

SELF-SERVICE PASSWORD RESET

05 If you selected **Reset via Email**, retrieve the email.



06 From the email from **noreply@ieso.ca** with the subject: **Reset your IESO Gateway Password**, click **Reset Password**.

From: IESO Program Admin <noreply@ieso.ca>
Date: Tue, Jan 4, 2022 at 8:08 AM
Subject: Reset your IESO Gateway Password
To: [redacted]

Dear Jessica,

Thank you for using IESO Gateway. This email will allow you to reset your password so you can access your applications.

Click the button below to reset the password for your IESO Gateway account:

Reset Password


Or copy and paste the below link into your browser:

https://gateway.ieso.ca/signin/reset-password/dfpJm_LZTblmz4sS8kBu

Please note, this link expires in 7 days.

SELF-SERVICE PASSWORD RESET

- 07** Reset your password by entering **a new password** and then re-entering the password. Click **Reset Password**.



Reset your Okta password

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Your password cannot be any of your last 4 passwords

New password

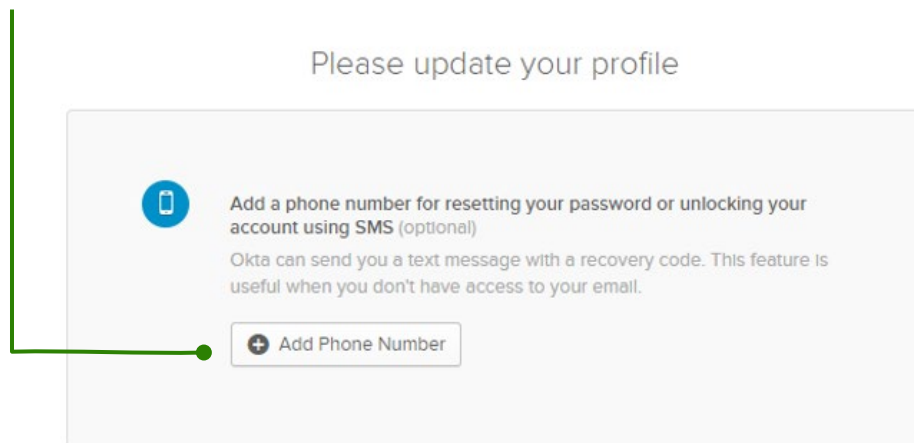
Repeat password

Reset Password

[Back to sign in](#)

SELF-SERVICE PASSWORD RESET

- 08** If you have not added a phone number, you will be prompted to **update your profile**. Click **Add Phone Number**.



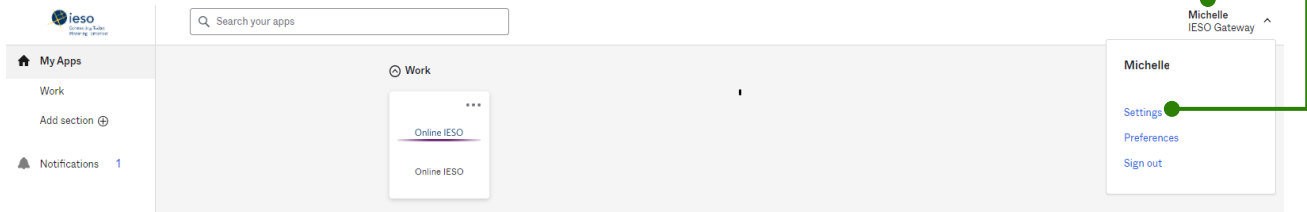
Note: If you are still having issues or receive an error trying to reset your password, please contact Retrofit Support Services at **1-844-303-5542** or **retrofit@ieso.ca**.

UPDATING SECURITY OPTIONS

To update your **password** or **security question**, follow the steps below.

01 Log in at <https://gateway.ieso.ca>

02 Click on **your name** in the upper right corner and click on **Settings**.



From here you can **change your password** and update **security** and **language** options.

Update your **first and last name, primary email and mobile phone.**

Update your **Display Language.**

Click here to enable **Recently Used Apps.**

Update your **password** to a new password.

Add **Extra Verification** for a more secure log-in.



Portal Overview

RETROFIT PORTAL OVERVIEW

HOME

When you log in to the portal, you will arrive at the **Retrofit portal Home page** where your **menu buttons** are at the top of the page to **begin, view** and **edit** your applications. You can also use the **buttons** in the middle of the home page to **begin, view** and **edit** your applications.

You can access your **profile settings** and **update the applicant or app rep roles for your application(s)** using the links on the right side of the Home page.

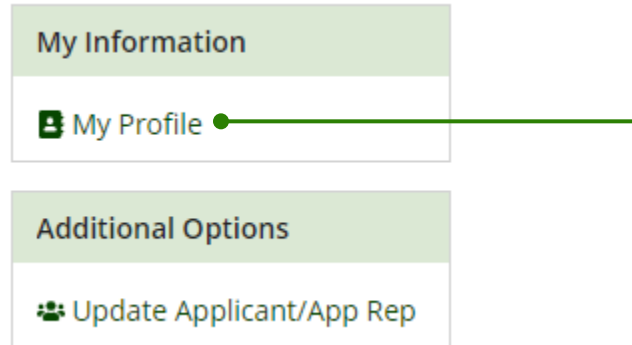
You can access additional **program resources** from your Portal Account on the Home page to help guide you through the Retrofit program. Please refer to these whenever necessary.

The screenshot shows the Retrofit Portal Home page. At the top, there is a navigation bar with links for HOME, PENDING ACTIONS, APPLICATIONS, and BEGIN NEW APPLICATION. A user profile icon and the Save On Energy logo are in the top right corner. A yellow banner at the top of the main content area reads: "Changes are being made to the Save on Energy Retrofit Program effective April 8th, 2022. Click here for more details". Below this, the page says "Welcome France," followed by a "Please note:" section with instructions on submitting applications and project completion. Three green buttons are prominently displayed: "View Pending Actions", "View All Applications", and "+ Begin New Application". A "Retrofit Resources" section with a "View Retrofit Resources" button is at the bottom left. On the right side, a sidebar menu includes "My Information" (with a sub-link for "My Profile") and "Additional Options" (with a sub-link for "Update Applicant/App Rep"). Green callout lines connect the text above to these specific UI elements.

HOME

1. My Profile allows you to update your contact information and your Account Type (Applicant / App Rep / both).

01 Click on **My Profile** under **My Information** on the right-side menu.



02 Click **Edit My Profile**

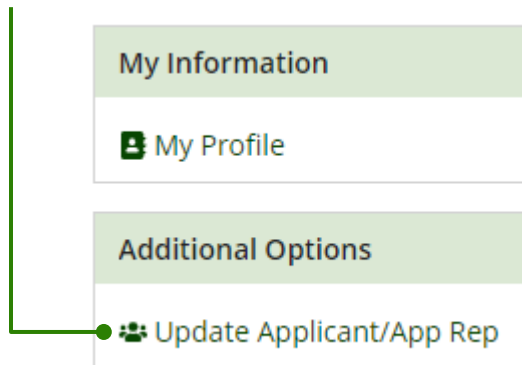
The image shows a form titled 'Update My Profile'. It contains several fields: 'First Name' (Morgan), 'Last Name' (Smith), 'Address 1 *' (123 Main St), 'Email' (morgansmithretrofitprogram@gmail.com), 'Phone Number' (416-999-9999), 'City' (Toronto), 'Province' (Ontario), 'Postal Code' (M4W1V2), and 'Country' (Canada). There is also a section for 'Account Type' with two checked checkboxes: 'Applicant' and 'Applicant Representative'. Below this is a question 'Where did you hear about the Save on Energy Program?' with the answer 'Friend/Neighbour'. A green line points from the text '02 Click Edit My Profile' to a button labeled 'EDIT MY PROFILE' in the bottom right corner of the form.

03 Check off **Applicant**, **Applicant Representative**, or both. Click **Save Changes**.

HOME

AS AN APPLICANT – UPDATE THE APPLICANT FOR MY APPLICATIONS

01 Click on **Update Applicant/App Rep** under **Additional Options** on the right-side menu.



02 Select **Applicant** for the **User Type** and click on **Proceed**.

A screenshot of the 'Update Bulk Users' form. The title is 'Update Bulk Users' with a subtitle 'Select one role to update user in existing applications.' Below the title is a large grey input field. Underneath, there is a 'User Type*' label and two radio buttons: 'Applicant' (which is selected) and 'Applicant Representative'. A green line with a dot at the end points to the 'Applicant' radio button. In the bottom right corner, there is a green 'PROCEED' button. A green line with a dot at the end points to the 'PROCEED' button.

03 Enter the new Applicant email address. The existing Applicant email address will be populated. **Note that the new Applicant must be registered with the Retrofit portal in advance of this step.**

Bulk Change Applicant

Enter existing applicant email address to replace this with new applicant in selected applications.

A screenshot of the 'Bulk Change Applicant' form. The title is 'Bulk Change Applicant' with a subtitle 'Enter existing applicant email address to replace this with new applicant in selected applications.' The form is divided into two main sections: 'Applicant selection' and 'New Applicant'. The 'Applicant selection' section has two columns: 'Existing Applicant' and 'New Applicant'. Under 'Existing Applicant', there is an 'Applicant Email *' field with a green bar, and 'First' and 'Last Name' fields with green bars. Under 'New Applicant', there is a 'New Applicant Email *' field with a placeholder 'New Applicant who will replace' and a green bar, and 'First Name' and 'Last Name' fields with green bars. A green line with a dot at the end points to the 'New Applicant Email *' field.

AS AN APPLICANT – UPDATE THE APPLICANT FOR MY APPLICATIONS

04 A list of your applications will be populated. Select one or more of the applications for which you wish to change the Applicant and click **Reassign**.

Select Application(s) to change Applicant *

Application Id	Application Name	Company Name	Applicant Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone	
<input checked="" type="checkbox"/>	2000143	Test Project - Abc	Ldcapl_100	[REDACTED]	3/31/2019	Ontario IMO	\$3,000.00	Pre-Project Application Under Review	Pre-project review
<input checked="" type="checkbox"/>	2000242	Apprep	Ret-1252	[REDACTED]	3/29/2019	Ontario IMO	\$65,000.00	Pre-Project Application Returned For Edits	Pre-project review
<input type="checkbox"/>	2000894	App Rep Fix	Testval4_no Lead Ldc	[REDACTED]	2/29/2020	Ontario IMO	\$16,000.00	Pre-Project Application Submitted For Approval	Pre-project application

CANCEL **REASSIGN**

05 Confirm the change by clicking **Yes**.

Clicking on Yes will replace existing Applicant Representative with new Applicant Representative

NO

YES

06 The system will provide you with a summary of changes. The user will be asked to confirm the change by clicking the Yes button.

Completion Status

Summary of Change

Previous Applicant
[REDACTED]

New Applicant
[REDACTED]

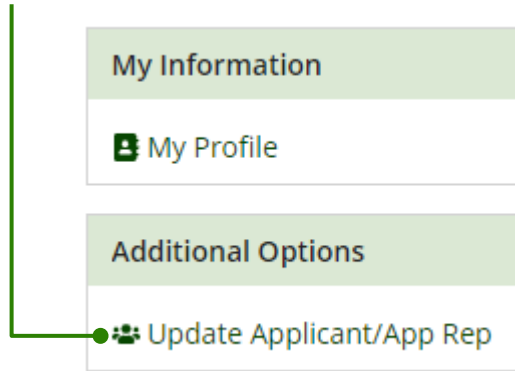
Selected Application IDs
102263,102340

Skipped Application IDs
N/A

Updated Application IDs
102263,102340

AS AN APPLICANT – UPDATE THE APP REP FOR MY APPLICATIONS

01 Click on **Update Applicant/App Rep** under **Additional Options** on the right-side menu.



02 Select **Applicant Representative** for the **User Type** and click on **Proceed**.



03 Enter the existing App Rep email address. Then, enter the new Applicant Representative email address. **Note that the New Applicant Representative must be registered with the Retrofit portal in advance of this step.**

Bulk Change Applicant Representative

Enter existing applicant representative email address to replace this with new applicant representative in selected applications.

The image shows a form titled 'Applicant Representative selection'. It is divided into two columns. The left column is titled 'Existing Applicant Representative' and contains a text field for 'Applicant Representative Email *', and two text fields for 'First Name' and 'Last Name'. The right column is titled 'New Applicant Representative' and contains a text field for 'New Applicant Representative Email *' with a green line pointing to it, and two text fields for 'First Name' and 'Last Name'.

AS AN APPLICANT – UPDATE THE APP REP FOR MY APPLICATIONS

04 A list of your applications with the existing App Rep will be populated. Select one or more of the applications for which you wish to change the Applicant Representative and click **Reassign**.

Select Application(s) to change Applicant Representative *

<input type="checkbox"/>	Application Id	Application Name	Company Name	Applicant Representative Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone
<input checked="" type="checkbox"/>	2000143	Test Project - Abc	[REDACTED]	[REDACTED]	3/31/2019	Ontario IMO	\$3,000.00	Pre-Project Application Under Review	Pre-project review
<input checked="" type="checkbox"/>	2000242	Apprep	[REDACTED]	[REDACTED]	3/29/2019	Ontario IMO	\$65,000.00	Pre-Project Application Returned For Edits	Pre-project review

<< < 1 - 10 of 683 > >>

CANCEL REASSIGN

05 Confirm the change by clicking **Yes**.

Clicking on Yes will replace existing Applicant Representative with new Applicant Representative

NO YES

06 The system will provide you with a summary of changes.

Completion Status

Summary of Change

Previous Applicant
[REDACTED]

New Applicant
[REDACTED]

Selected Application IDs
102263,102340

Skipped Application IDs
N/A

Updated Application IDs
102263,102340

AS AN APPLICANT – ADD AN APP REP AT ANY POINT AFTER CREATING A NEW APPLICATION

01 From the **Applications** tab, open the application for which you wish to add an Applicant Representative.

Application Id	Company Name	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	Application Status Milestone	Head Office
2001251			Mar 30, 2022				\$0.00	Cancelled	Project closed	
2001250	Test	Test	Mar 23, 2022		Apr 6, 2022	Apr 7, 2022	\$6,400.00	Pre-Project Application Saved As Draft	Pre-project application	
2001249	Test	Test	Mar 23, 2022		Mar 28, 2022	Mar 31, 2022	\$0.00	Pre-Project Application Saved As Draft	Pre-project application	

02 Click on **Related Actions** from the application.

Retrofit Application: Test

Summary **Related Actions**

03 Click on **Add Applicant Representative**.

Retrofit Application: Test

Summary **Related Actions**



Copy Application

Click to copy this application



Add Applicant Representative

Add an Applicant Representative to the application

AS AN APPLICANT – ADD AN APP REP AT ANY POINT AFTER CREATING A NEW APPLICATION

04 Enter Applicant Representative's email address and click **Add**. This will complete the change. **Note that the new Applicant Representative must be registered with the Retrofit portal in advance of this step.**

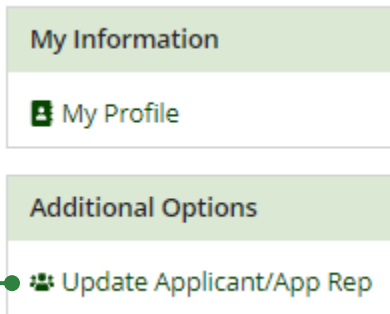
Add Applicant Representative

Select Applicant Representative Email to add *

First Name	Last Name
<input type="text"/>	<input type="text"/>

AS AN APP REP – UPDATE THE APPLICANT FOR MY APPLICATIONS

01 Click on **Update Applicant/App Rep** under **Additional Options** on the right-side menu in the Home screen.



02 Select **Applicant** for the **User Type** and click **Proceed**.

Update Bulk Users
 Select one role to update user in existing applications.

User Type *

Applicant Applicant Representative

PROCEED

03 Enter the existing Applicant email address and the new email address. The existing Applicant email address will be populated. **Note that the new Applicant must be registered with the Retrofit portal in advance of this step.**

Bulk Change Applicant

Enter existing applicant email address to replace this with new applicant in selected applications.

Applicant selection

Existing Applicant		New Applicant	
Applicant Email *		New Applicant Email *	
<input type="text"/>		<input type="text"/>	
First Name	Last Name	First Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

AS AN APP REP – UPDATE THE APPLICANT FOR MY APPLICATIONS

04 A list of your applications will be populated. Select one or more of the applications for which you wish to change the Applicant and click **Reassign**.

Select Application(s) to change Applicant *

Application Id	Application Name	Company Name	Applicant Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone	
<input checked="" type="checkbox"/>	2000143	Test Project - Abc	Ldcapl_100	Yallala, Swetha	3/31/2019	Ontario IMO	\$3,000.00	Pre-Project Application Under Review	Pre-project review
<input checked="" type="checkbox"/>	2000242	Apprep	Ret-1252	Yallala, Swetha	3/29/2019	Ontario IMO	\$65,000.00	Pre-Project Application Returned For Edits	Pre-project review
<input type="checkbox"/>	2000894	App Rep Fix	Testval4_no Lead Ldc	Yallala, Swetha	2/29/2020	Ontario IMO	\$16,000.00	Pre-Project Application Submitted For Approval	Pre-project application

CANCEL REASSIGN

05 Confirm the change by clicking **Yes**.

Clicking on Yes will replace existing Applicant with new Applicant

NO YES

06 The system will provide you with a summary of changes. **Note that these changes need to be accepted by the existing Applicant in order to be completed.**

Completion Status

The set of application updates requires approval from Applicant. Please review the summary of change that is initiated

Summary of Change

Previous Applicant
[Redacted]

New Applicant
[Redacted]

Selected Application IDs
2000143,2000242

Skipped Application IDs
N/A

Updated Application IDs
2000143,2000242

AS AN APP REP – UPDATE THE APPLICANT FOR MY APPLICATIONS

07 The existing Applicant will receive the task under the **Pending Actions** tab to accept the change initiated by the App Rep for each selected application.

Task List

Search By:

Application Id: Company Name: Application Name: Lead LDC: Application Status Milestone:

Task Created From: Task Created To: Application Track:

Name	Company Name	Application Name	Application Id	Task Created	Lead LDC	Application Status Milestone	Application Track
Applicant Change Approval Request: 2000143	Ldcapl_100	Test Project - Abc	2000143	7/27/2020 11:40 AM EST	Ontario IMO	Pre-project review	
Applicant Change Approval Request: 2000242	Ret-1252	Apprep	2000242	7/27/2020 11:40 AM EST	Ontario IMO	Pre-project review	

08 The Applicant must click on **Approve** to apply the change. **If the Applicant selects Reject, the changes will not be implemented for the application.**

Approve Applicant Change Request

Applicant Representative "Apprep 2672" has initiated a change of Applicant. Please review the details below and APPROVE or REJECT the change that is initiated.

Summary of Change

Application ID: 2000143

Current Applicant:

New Applicant:

09 The Applicant Representative will be notified via email of this change when the Applicant accepts or rejects the change.

AS AN APP REP – UPDATE THE APP REP FOR MY APPLICATIONS

01 Click on **Update Applicant/App Rep** under **Additional Options** on the right-side menu.

02 Select **App Rep** for the **User Type** and click **Proceed**.

03 Enter the new Applicant Representative email address. The existing App Rep email address will be populated. **Note that the new Applicant Representative must be registered with the Retrofit portal in advance of this step.**

Bulk Change Applicant

Enter existing applicant email address to replace this with new applicant in selected applications.

AS AN APP REP – UPDATE THE APP REP FOR MY APPLICATIONS

04 A list of your applications as the existing App Rep will be populated. Select one or more of the applications for which you wish to change the Applicant Representative and click **Reassign**.

Application Id	Application Name	Company Name	Applicant Representative Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone	
<input checked="" type="checkbox"/>	2000143	Test Project - Abc	Ldcapi_100	Thiyarajah, Geerthanan	3/31/2019	Ontario IMO	\$3,000.00	Pre-Project Application Under Review	Pre-project review
<input checked="" type="checkbox"/>	2000242	Apprsp	Ret-1252	Thiyarajah, Geerthanan	3/29/2019	Ontario IMO	\$65,000.00	Pre-Project Application Returned For Edits	Pre-project review

1 - 10 of 683

05 Confirm the change by clicking **Yes**.

Clicking on Yes will replace existing Applicant Representative with new Applicant Representative

NO
YES

AS AN APP REP – UPDATE THE APP REP FOR MY APPLICATIONS

06 The system will provide you with a summary of changes.

Completion Status

Summary of Change

Previous Applicant Representative
[REDACTED]

New Applicant Representative
[REDACTED]

Selected Application IDs
2000780,2000782

Skipped Application IDs
N/A

Updated Application IDs
2000780,2000782



Project Applications

CREATING AN APPLICATION

An Applicant or Applicant Representative can create an application.

BEGINNING THE APPLICATION (AS AN APPLICANT)

01 Click **Begin New Application**.

If you would like to **assign the application to an Applicant Rep to complete**, continue to page 41.

Begin a Retrofit Application

RETROFIT PROGRAM APPLICATION REQUIREMENTS

- Important:** Prior to commencing your project, ensure that the Retrofit program application has been submitted and that the Participant Agreement has been accepted.
- If you choose to begin your project before you receive pre-approval, you assume the risk that your application may not be approved or that the incentive may be lower than expected.
- Both the Applicant and Applicant Representative must have registered for a User Account before they can use this Retrofit portal.
- The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.
- Applicants are required to review the Terms and Conditions and the Participant Agreement and signify acceptance using the options available at the end of this application.
- Please ensure that all supporting documentation for your project is uploaded to the application. Incomplete applications will not be processed and will not be pre-approved.
- After completing your project, you must make a post-project submission to provide evidence of project completion to receive your participant incentive. An invoice for the approved incentive amount will also be required. Please speak to your Save on Energy representative for assistance if needed.

For more information on Retrofit project requirements, please [Click Here](#)

Continue to Application

OR

Select an App Rep to Continue the Application

[What is App Rep?](#)

02 Click **Continue to Application**.

This will create a new application to be completed, and it will bring you to the application main page.

BEGINNING THE APPLICATION (AS AN APPLICANT)

You can view the application information from the main application page:

The project phase is displayed in the progress bar.

The Application ID is noted in this screen and will be used in future correspondence about your application.

The Creation Date is displayed under the progress bar.

Application Form

Depending on your Application Status you may:

- Edit an Application or Post-Project Submission that is returned for edits
- Initiate an Post project submission
- Submit an Invoice
- Edit an invoice that is returned for edits
- View the application
- Access the Related Actions tab for additional options

Application Id: 2001250

Head Office App: ✘

Progress Bar: Pre-Project Application (active), Pre-Project Review, Post-Project Submission, Post-Project Review, Project Closed

Creation Date: Mar 23, 2022 12:50 PM

Basic Details

Project Name

Project Description

Have you received any other financial incentives for this project by any other public program?*

Y N

Applicant Details

Note: Your incentive will be sent to this address

Company

Address 1

Address 2/Unit # Address 3

First Name Last Name

Email Phone Number

City Province

HST# Postal Code

The "Basic Details" section is where the project name and description is displayed.

The "Applicant Details" section summarizes Applicant information.

Applicant Representative Details

First Name	Last Name
Email	Phone Number

Manage Facilities

You must add at least one facility for your Application.

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status
No items available					

+ ADD NEW FACILITY

Estimated Calculation Results

Energy, Demand, and Incentive Information			
Estimated Application Eligible Cost	\$0	Estimated Application Energy Saving	0
Estimated Application Incentive Amount	\$0.00	Estimated Application Demand Reduction	0

Note: Incentives will be capped based on the Retrofit Program Rules

The "Applicant Representative Details" section summarizes Applicant Representative information (if applicable).

The "Estimated Calculation Results" section summarizes eligible project costs, energy savings, demand reduction and incentive information.

ASSIGNING A NEW APPLICATION TO AN APP REP

The Applicant can assign an Applicant Representative to complete an application on their behalf.

01 Click **Begin New Application**.

Begin a Retrofit Application

RETROFIT PROGRAM APPLICATION REQUIREMENTS

- Important:** Prior to commencing your project, ensure that the Retrofit program application has been submitted and that the Participant Agreement has been accepted.
- If you choose to begin your project before you receive pre-approval, you assume the risk that your application may not be approved or that the incentive may be lower than expected.
- Both the Applicant and Applicant Representative must have registered for a User Account before they can use this Retrofit portal.
- The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.
- Applicants are required to review the Terms and Conditions and the Participant Agreement and signify acceptance using the options available at the end of this application.
- Please ensure that all supporting documentation for your project is uploaded to the application. Incomplete applications will not be processed and will not be pre-approved.
- After completing your project, you must make a post-project submission to provide evidence of project completion to receive your participant incentive. An invoice for the approved incentive amount will also be required. Please speak to your Save on Energy representative for assistance if needed.

For more information on Retrofit project requirements, please [Click Here](#)

Continue to Application

OR

Select an App Rep to Continue the Application

[What is App Rep?](#)

02 Click **Select an App Rep to Continue the Application**.



Note: Applicants are able to add an Applicant Rep at any point after creating the application. Details on adding an Applicant Rep can be found on page 29. They are also able to update an existing Applicant Rep to a new contact. Details on updating an Applicant Rep can be found on page 34.

ASSIGNING A NEW APPLICATION TO AN APP REP

03 Enter the Applicant Representative's email address.

The Applicant can fill in the project details by clicking the "Continue to Application" button even if an App Rep has been selected.

Begin a Retrofit Application

RETROFIT PROGRAM APPLICATION REQUIREMENTS

- Important:** Prior to commencing your project, ensure that the Retrofit program application has been submitted and that the Participant Agreement has been accepted.
- If you choose to begin your project before you receive pre-approval, you assume the risk that your application may not be approved or that the incentive may be lower than expected.
- Both the Applicant and Applicant Representative must have registered for a User Account before they can use this Retrofit portal.
- The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.
- Applicants are required to review the Terms and Conditions and the Participant Agreement and signify acceptance using the options available at the end of this application. Incomplete applications will not be processed and will not be pre-approved.
- Please ensure that all supporting documentation for your project is uploaded to the application.
- After completing your project, you must make a post-project submission to provide evidence of project completion to receive your participant incentive. An invoice for the approved incentive amount will also be required. Please speak to your Save on Energy representative for assistance if needed.

For more information on Retrofit project requirements, please [Click Here](#)

Select an Applicant Representative (Optional)

App Rep's Email Address

SEARCH

First Name

Last Name

[Continue to Application](#)

[What is App Rep?](#)

Your App Rep will receive this Application to complete on your behalf.
Note - only you can submit the Application.

[SEND TO APP REP](#)

04 Click **Search**.

05 Click **Send to App Rep**.

The Applicant Representative will receive an email notification to edit the application.

When the application is complete, the Applicant will need to review it before final submission. Please visit page 57 for details on Submitting an Application.



Note: Applicant Representatives must have fully activated their Save on Energy Retrofit portal account before they are able to be added to an application. If you are unable to find their account, please have them ensure they have correctly registered as an "Applicant Representative."

BEGINNING THE APPLICATION (AS AN APPLICANT REPRESENTATIVE)

01 Click **Begin New Application**.



02 Enter the Applicant's email address

RETROFIT PROGRAM APPLICATION REQUIREMENTS

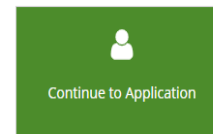
1. **Important:** Prior to commencing your projects, ensure that the application has received pre-approval.
2. Both the Applicant and Applicant Representative must have registered for a User Account before they can use this Application.
3. The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.
4. Applicants are required to review the Terms and Conditions and the Participant Agreement and signify acceptance using the options available at the end of this Application.
5. Please ensure that all supporting documentation for your Project(s) are uploaded to the Application. Incomplete Applications will not be processed and will not be pre-approved.
6. After completing your Project(s) you must submit evidence of Project completion in order to receive your Participant Incentive.

For more information on Retrofit project eligibility, please [Click Here](#)

Select an Applicant

Applicant's Email Address *

SEARCH



[What is App Rep?](#)

NOTE: After Completing your Project(s) you must submit evidence of Project completion in order to receive your Participant Incentive

First Name John

Last Name Johnson

03 Click **Search**.

04 Click **Continue to Application**.

This will create a new application to be completed, and it will bring you to the application main page.



Note: Applicants must have fully activated their Save on Energy Retrofit portal account before they are able to be added to an application started by an App Rep. If an App Rep is unable to find their account on the portal, the Applicant will need to ensure they have correctly completed their registration as detailed on page 6, and that they are registered as an "Applicant," not an "Applicant Representative."

APPLICANT DETAILS

If this is the Applicant’s first application, the **Applicant Details** will need to be completed. This section will automatically populate for future applications.

Review the mandatory fields in the Application Details section and make any required updates.

The address listed in this section will be the address to which the incentive cheque is mailed.

Applicant Details

Note: Your incentive will be sent to this address

Company *		Address 1 *	
<input type="text"/>		<input type="text"/>	
First Name	Last Name	Address 2/Unit #	Address 3
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	Phone Number	City *	Province *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
HST#	Postal Code *		
<input type="text"/>	<input type="text"/>		



Note: If an Applicant Representative is assigned to the application, the Applicant Representative Details section will automatically populate.

Applicant Representative Details

First Name	Last Name
<input type="text"/>	<input type="text"/>
Email	Phone Number
<input type="text"/>	<input type="text"/>

ADDING BASIC PROJECT DETAILS

Complete the mandatory fields in the **Basic Details** section of the **application main page**.

Enter a project name under the "Project Name."

Briefly describe the project in the "Project Description."

Basic Details

Project Name *

TEST

Project Description *

TEST

Have you received any other financial incentives for this project by any other public program?*

Y N

Funding Comments *

Funding Provider(s) *

Name of Program(s) *

Total Funding Amount *

Estimated Project Start Date	Mar 28, 2022	Estimated Project End Date	Mar 31, 2022
Lead LDC	Ontario IMO		
Zone	Toronto		

Select whether you have received other financial incentives for the project from other programs.

If you are receiving other financial incentives, you must provide additional information, such as funding provider, program name and amount received.

ADDING FACILITIES

01 Click **Add New Facility**.

Manage Facilities

You must add at least one facility for your Application.

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status
No items available					

+ ADD NEW FACILITY

This will bring you to the main page for the new facility.

02 Complete the mandatory fields in the **Facility Details** section of the **facility main page**, if you are adding a new facility that has not been used in a previous application.

Facility Details

Facility Name*

Facility Type* -- Select a value --

Ownership Type* -- Select a value --

Electric Utility Account ?*

Estimated Project Start Date ?* mm/dd/yyyy

Estimated Project End Date ?* mm/dd/yyyy

Description*

Address 1*

Address 2/Unit #

Address 3

City* Toronto

Province ON

Postal Code*

Local Distribution Company Ontario IMO

Enter a facility name under the "Facility Name" section.

Select the "Facility Type" from the drop-down menu.

Select the "Ownership Type" from the drop-down menu.

Under the "Address" section, enter the facility address, city, and postal code.

Enter a project description under the "Description" section.

Select an estimated "Project Start Date" and "Project End Date" from the calendar.

Enter the utility account number under the "Electric Utility Account" section.

ADDING FACILITIES FROM AN EXISTING FACILITY

01 Click **Add New Facility**.

Manage Facilities

You must add at least one facility for your Application.

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status
No items available					

+ ADD NEW FACILITY

02 Click on **Add Existing Facility**.

▼ Add Existing Facility

Application Name	Facility Name
<input type="text"/>	<input type="text"/>
City	Address1
<input type="text"/>	<input type="text"/>

SEARCH

03 Enter **facility information**, such as the application name, facility name, city or address.

04 Click **Search**.

05 Select the facility from the facilities list.

Facility Name	Application Name	Address 1	City
TEST	Test		Toronto

CLEAR FACILITY

This will populate the Basic Details section with the information previously provided from the selected facility. You will still be required to select the **estimated start** and **end dates**.

ADDING PRESCRIPTIVE MEASURES

As of April 8th, 2022, some new measures were added to the Retrofit program. Some of these measures enable greater flexibility and improve accuracy of allocated savings by allowing program participants to provide more information on their use. The required inputs will vary by measure.

PRESCRIPTIVE MEASURE INPUT

01 To add a measure, click **Add New Prescriptive Measure** in the **Apply Measures to Facility** section.

The screenshot shows a section titled "Apply measures to facility" containing a table. The table has the following columns: Measure Category, Measure Name, Measure Description, Estimated Quantity, Estimated Calculated Incentive Amount, and Status. The table is currently empty, displaying "No items available". Below the table is a green button with the text "+ ADD NEW PRESCRIPTIVE MEASURES". A green line with a dot at the end points from the button to the text in step 01.

02 Complete the mandatory fields in the **Measure Details** section of the **Measures page**. The first example below (page 49) shows a Prescriptive Measure with one required field. The second example below (page 50) shows a Prescriptive Measure with more than one required field.

Example 1: Prescriptive Measure with one required field

The screenshot shows a web form for adding a prescriptive measure. The form is divided into two main sections: 'Measure Details' on the left and 'Manufacturer' and 'Estimated Quantity' on the right. Below the form are buttons for 'CANCEL', 'SAVE TO DRAFT', and 'APPLY'.

Measure Details

- Measure Category [Ⓜ]*
- End Use [Ⓜ]*
- Conservation Measure Name [Ⓜ]*
- Conservation Measure Description [Ⓜ]*

Manufacturer

- Manufacturer [Ⓜ]*
- Model Number [Ⓜ]*

Estimated Quantity [Ⓜ]*

kWh Savings	0
Peak Demand Savings	0
kW Reduction	0
Estimated Incentive	\$0

Annotations:

- Select the "Measure Category".
- Select the "End Use".
- Select the "Conservation Measure Name".
- Select the "Conservation Measure Description".
- Enter the "Manufacturer" Name.
- Enter the Model Number.
- If you are installing lighting products, enter the "ES DLC Code".
- Enter the "Estimated Quantity".
- Click "Save to Draft" if you want to save a measure as draft.
- Click "Apply" to add the measure to the facility.

Example 2: Prescriptive Measure with more than one required field

Select the "Measure Category".

Select the "End Use".

Select the "Conservation Measure Name".

Select the "Conservation Measure Description".

Enter the "Manufacturer" Name.

Enter the Model Number.

Enter the "Estimated Quantity".

Enter the "IPLV Improvement".

Enter the "Unit Size in Tons".

Click "Save to Draft" if you want to save a measure as draft.

Click "Apply" to add the measure to the facility.

Measure Details

Measure Category *

End Use *

Conservation Measure Name *

Conservation Measure Description *

Manufacturer *

Model Number *

ES DLC Code

Estimated Quantity *

Unit Size in Tons *

IPLV Improvement *

kWh Savings 0

Peak Demand Savings 0

kW Reduction 0

Estimated Incentive \$0

Eligibility Criteria

1. This incentive is only applicable to systems used for space cooling. Process cooling systems are not eligible for this incentive.
2. Must have a rated kW/ton for the Integrated Part Load Value (IPLV) that is less than the qualifying efficiency.
3. Efficiency rating must be based on AHRI Standard 550/590 (I-P)-2018 for Integrated Part Load Value (IPLV) conditions and not based on full-load conditions.
4. Must qualify for either ASHRAE 90.1-2016 Table 6.8.1-3 Path A or B efficiency.
5. Efficiency incentive is based on efficiency rating above the minimum efficiency level.
6. Refrigerant must comply with local codes and authorities having jurisdiction.
7. The AHRI net capacity value should be used to determine the chiller tonnage.
8. A manufacturer's specification sheet with the rated kW/ton-IPLV or EER-IPLV and nominal tonnage must accompany the application. The specification sheet must also break out the kW/ton values at 100%, 75%, 50%, and 25% load per AHRI Standard 550/590 (I-P)-2018.
9. Redundant chillers are not eligible for incentives
10. The qualifying incentive for maximum equipment capacity is equal to or less than 1,000 tons.

Assumed Base Case

Incentive Per Unit

Measure Unit

CANCEL

SAVE TO DRAFT

APPLY

ADDING PRESCRIPTIVE MEASURES

After all the measures in the project scope are added under the **Apply measures to facility** section, the **total prescriptive project cost** must be added under **Estimated Facility Cost Prescriptive** field.

03 Enter the total **prescriptive project cost** in the **Estimated Facility Cost Prescriptive** field.

Apply measures to facility

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status		
Lighting (2021-2024)	8' T8 LED Lamp	<= 43W >= 3200 Lumens	400	\$3,200.00	Complete	Edit	

Estimated Facility Cost Prescriptive*

Prescriptive measure costs are limited to the equipment purchased and installed, labour for the installation of the equipment by suppliers and costs to dispose of or decommission the replaced equipment.

[+ ADD NEW PRESCRIPTIVE MEASURES](#)

If you click on the **Apply** button in the **Facility** page after entering the cost, a **Recalculate** button will appear below the **Add New Prescriptive Measures** button, along with a prompt that states “You must click recalculate before continuing.”

04 Click **Recalculate** and wait for the portal page to refresh.

Apply measures to facility

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status		
Lighting (2021-2024)	8' T8 LED Lamp	<= 43W >= 3200 Lumens	400	\$3,200.00	Complete	Edit	

Estimated Facility Cost Prescriptive*

Prescriptive measure costs are limited to the equipment purchased and installed, labour for the installation of the equipment by suppliers and costs to dispose of or decommission the replaced equipment.

[+ ADD NEW PRESCRIPTIVE MEASURES](#)

[RECALCULATE](#)

You must click recalculate before continuing

05 Review the **Estimated Calculation Results** section on the **Facility Main Page**.

i Note: There is a minimum incentive threshold for Retrofit applications to be eligible. The total calculated incentive of the application must be greater than that threshold to be eligible for incentives. You will be blocked from submitting a facility if it does not meet the minimum eligibility criteria.

ADDING PRESCRIPTIVE MEASURES

06 Click **Apply**.

Estimated Calculation Results

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	\$7,000.00	53,861.200	9.620	14.920	\$3,200.00
Total	\$7,000.00	53,861.200	9.620	14.920	\$3,200.00

Note: Incentives will be capped based on the Retrofit Program Rules

Project Type

BACK TO APPLICATION

DELETE

DUPLICATE FACILITY

SAVE TO DRAFT

APPLY

DUPLICATING A FACILITY

If you need to add more than one facility to your application, you can save time by duplicating a facility instead of creating each one from scratch.

01 Click on the **Edit** button to open an **existing facility**.

Manage Facilities

Updated?	Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
No	TEST	393 University Ave	Toronto	\$3,200.00	TEST	Complete	Edit
No	TEST	393 University Ave	Toronto	\$3,200.00	TEST	Complete	Edit

[+ ADD NEW FACILITY](#)

02 Scroll to the bottom of the **Facility Main Page** and then click **Duplicate Facility**.

Estimated Calculation Results

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	\$7,000.00	53,861.200	9.620	14.920	\$3,200.00
Total	\$7,000.00	53,861.200	9.620	14.920	\$3,200.00

Note: Incentives will be capped based on the Retrofit Program Rules

Project Type

[BACK TO APPLICATION](#)
[DELETE](#)
[DUPLICATE FACILITY](#)
[SAVE TO DRAFT](#)
[APPLY](#)

03 A prompt will appear on the screen. Click on the **Yes** button if you wish to proceed with duplicating the facility, or click on the **No** button if you wish to withdraw from the facility duplication process for the moment.




Duplicating this facility will save all current changes, create a new facility identical to the current facility, and then return you to the current facility. All facilities are listed on the Application page. Proceed?

This creates a new facility that is identical to the existing facility.

DUPLICATING A FACILITY

04 After the page refreshes, Click **Apply** to return to the **Application Main Page**. The duplicated facility will appear under the **Manage Facilities** section.

Manage Facilities

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
TEST	393 University Ave	Toronto	\$0.00	TEST	Incomplete	Edit 
TEST	393 University Ave	Toronto	\$3,200.00	TEST	Complete	Edit 
TEST	University Avenue	Toronto	\$0.00		Incomplete	Edit 

+ ADD NEW FACILITY

Click on the **Edit** button beside the **Incomplete** status.

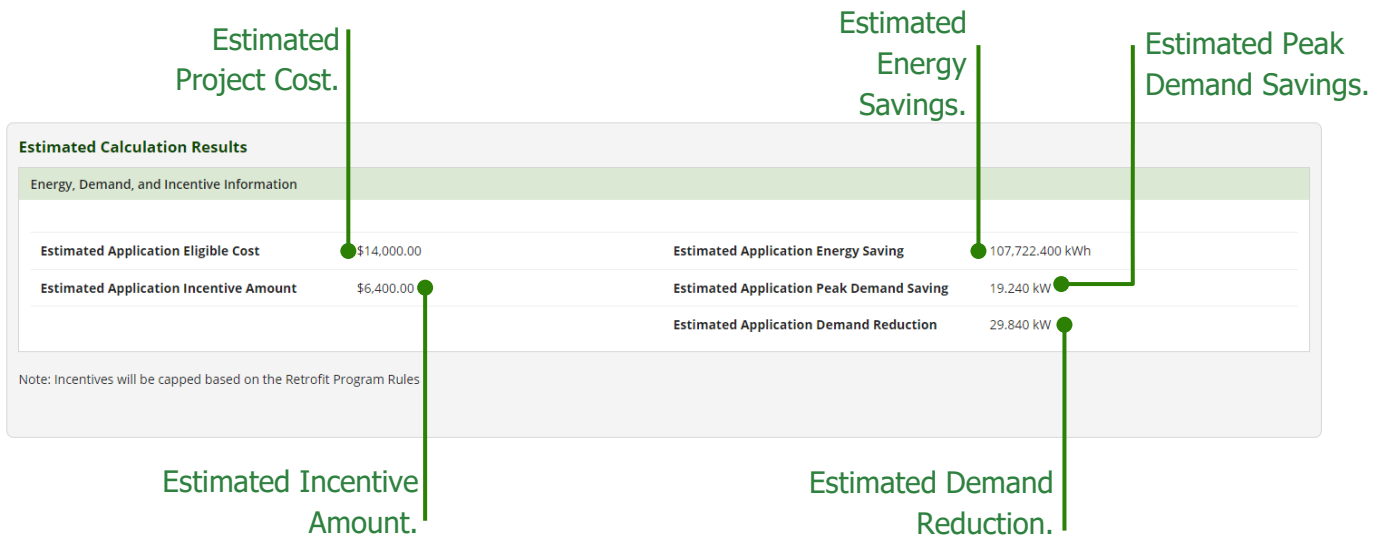
This will take you to the new facility's **Facility Main Page** where you can enter the details for your new facility.



Note: The duplicated facility's status will be incomplete. You must complete the facility in order to submit the application.

REVIEWING ESTIMATED CALCULATION RESULTS

Review the **Estimated Calculation Results** section for your application once you have added all your facilities.



Note: If you are an Applicant, continue to **Submitting the Application** section on page 57. Once the application has been submitted by the Applicant, the Application Status for this application displays as "Pre-Project Application Submitted for Approval." This indicates that the application has been submitted to the Save on Energy Technical Reviewer for review.



If you are an Applicant Representative, then you must forward the application to the Applicant. Continue to **Forwarding the Application to the Applicant** section on page 56. Once the application is submitted to the Applicant, the Application Status for this application then displays as "Pre-Project Application Sent to Applicant."

FORWARDING THE APPLICATION TO THE APPLICANT

01 Enter a comment in the text box under History and Comments section of the Application Main Page. It will be sent to the Applicant with the application to submit.

> History and Comments

Comment

Looks good. Please review and submit.

SAVE TO DRAFT

SUBMIT TO APPLICANT

02 Click **Submit to Applicant**.

The Applicant will now receive an email notification to submit the application.

SUBMITTING THE APPLICATION

An application can only be submitted from the **Applicant's** account.

01 Click on the **Pending Actions** tab.

Pending Actions

Depending on your Application Status you may:

- The Pending Actions page where you find assigned tasks for your current application(s). This may include applications of Post-project Submissions that are saved as draft and not yet submitted.
- Applications and Post Project Submissions prepared by your Applicant Representative will also appear here for your final submission.

Task List

Search By

Application Id: Company Name: Application Name: Lead LDC: Application Status Milestone:

Task Created From: Task Created To: Application Track:

Name	Company Name	Application Name	Application Id	Task Created	Lead LDC	Application Status Milestone	Application Track
Edit Pre-Project Application 2001250: Test	Test	Test	2001250	3/30/2022 8:09 PM EST	Ontario IMO	Pre-project application	
Edit Pre-Project Application 2001249: Test	Test	Test	2001249	3/30/2022 7:40 PM EST	Ontario IMO	Pre-project application	

> History and Comments

Comment

Please review.

02 Enter the Application number in the Application ID field.

03 Click **Reset**, located below the "Application Track" field.

04 Click **Edit Pre-Project Application "Project ID: Project Name."**

05 Review all the information in the application and make any necessary edits if required.

06 Enter a comment and then click **Proceed To Submission Page**.

If the application was completed by an Applicant Representative, you can click **Send to App Rep** to return the application to them, if required.

SUBMITTING THE APPLICATION

- 07** Select the **Yes** option to indicate that all the information in the application is correct and to indicate that you have read and agreed to the Participant Agreement. This is where Applicants agree to the Terms and Conditions of the program under which they will receive the incentive. Any questions about the Participant Agreement can be directed to a Save on Energy Representative.

Application Approval

You have now reached the final stage before your RETROFIT Application can be submitted for review and pre-approval. If you commence your Project prior to receiving pre-approval, you will not be eligible to receive a Participant Incentive.

<p>PRIOR TO Commencing your Project(s) Ensure that the IESO has pre-approved this Application and your Participant Agreement</p>	<p>AFTER Completing your Project(s) You must submit evidence of Project completion in order to receive your Participant Incentive</p>
---	--

This application will be reviewed and processed by the IESO

Participation Agreement

Conservation First...
1 / 15
50%

Retrofit Program - Participant Agreement

The Participant (being the "Applicant" in the Application) has applied for Participant Incentives, in respect of Eligible Costs, pursuant to the Application submitted to the LDC under the Save on Energy Retrofit Program. All capitalized terms not defined herein will have the meanings in Schedule 1.

- 1) PARTICIPANT INCENTIVE: The LDC will, subject to the terms and conditions of this Participant Agreement and the Application, pay to the Participant a Participant Incentive for the implementation of each Project described in the approved Application. In addition to the other provisions hereof, payment of the Participant Incentive is subject to and conditional upon the following terms and conditions:
 - a) the Participant will implement each of the Projects described in the Application by each Project's project completion date provided in the Application and in no event after December 31, 2020 unless otherwise by written approval of the LDC in its absolute and sole discretion. For certainty, any extension beyond December 31, 2020 not expressly consented to in writing by the LDC shall be null and void and of no force or effect;
 - b) the Participant will provide the LDC with evidence of the implementation and completion of each Project and verification of each Project's Eligible Costs, in the form of accounting records and contractor invoices, and any other evidence that the LDC may require, including visual inspections by the LDC. For certainty, the LDC may reject Applications where it has determined that the Project's Eligible Costs are beyond reasonable standard industry costs as determined by the LDC at its sole discretion;
 - c) the LDC will have the right in its absolute discretion to decide whether or not to accept or approve the evidence provided pursuant to Section 1(b); and
 - d) the Participant will provide an invoice to the LDC for the Participant Incentive no later than 150 days following project completion, unless otherwise agreed to by the LDC at its sole discretion.
- 2) AMOUNT AND FORM OF PARTICIPANT INCENTIVE: The Participant acknowledges that the total amount of the estimated Participant Incentives set forth in the Application is based upon estimated Demand Savings, estimated Energy Savings and estimated Eligible Costs based on the Application and, subject to the following, will be the

I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. *

 Yes

I have read and agree to the Participant Agreement. *

 Yes

[Review our Pre-Project Application Checklist \(pdf\)](#)
And our [Post-Project Submission Checklist \(pdf\)](#)

BACK TO APPLICATION
SUBMIT

- 08** If the application has been assigned an Applicant Representative you will see an option to indicate that communication can be with the App Rep. If that's what you prefer, select **Yes**.

- 09** Click **Submit**.

SUBMITTING THE APPLICATION

- 10** The Save on Energy Technical Reviewer will now receive an email notification to review the application, and you will receive a notification that your application has been submitted. Click **Okay**.

Successful Submission for Application: [REDACTED]

Thank you for your interest in the Save on Energy Retrofit Program. Ontario IMO has received your application.

APPLICATION INFORMATION

Submission Date: [REDACTED]

Application Name: [REDACTED]

Application ID: [REDACTED]

Project Location(s): Peaches [REDACTED]

Total Estimated Application Incentive: [REDACTED]

Applicant Representative Name: [REDACTED]

Applicant Representative Email Address: [REDACTED]

Applicant Representative Phone Number: [REDACTED]

WHAT'S NEXT?

Your project will be reviewed for eligibility. You may receive a request for a site visit or additional information by your Electric Utility. You will receive confirmation of approval, a request for edits or otherwise shortly.

OKAY



Note: At this stage, your application has been submitted and will be assigned to a Save on Energy Technical Reviewer for review. Should they have any questions about the application provided, they will reach out to the Applicant and/or Applicant Representative. Once reviewed and approved, your project status will change to "Pre-Project Application Approved."

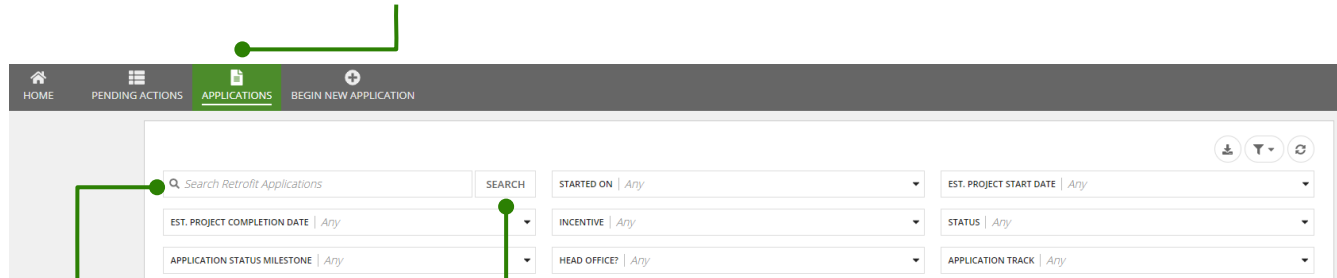


Note: When you begin your project is up to you. You can start work once your application is submitted, or you may wait until your application receives pre-approval to ensure it meets program requirements. If you choose to start your project before your application is pre-approved, it is important to know there is a risk that your project may receive a lower-than-expected incentive amount, or that your project application may not be approved.

COPYING THE APPLICATION

Applicants and **Applicant Representatives** can create a copy of a pre-existing application.

01 Click on the **Applications** tab.



02 Enter the Application ID.

03 Click **Search**.

Q 2001249

EST. PROJECT COMPLETION DATE | Any

APPLICATION STATUS MILESTONE | Any

Application Id	Company Name	Application Name	Started On	Applicant Rep	Est. Project Start Date
2001249	Test	Test	Mar 23, 2022		Mar 28, 2022

04 Click the **Application ID**.

Retrofit Application: Test

Summary **Related Actions**



Copy Application
Click to copy this application



Add Applicant Representative
Add an Applicant Representative to the application

05 Click on **Related Actions** tab.

06 Click on **Copy Application**.

COPYING THE APPLICATION

07 Click **Yes**.

Are you sure you want to copy this application?

NO

YES

The application can now be modified where required for a new project.

RECALLING AN APPLICATION

The **Applicant** can recall an application that has been submitted for approval, as long as the Save on Energy Technical Reviewer has **not** started their review.

01 Click on the **Applications** tab.

Application Id	Company Name	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	Application Status Milestone	Head Office
2001251			Mar 30, 2022				\$0.00	Cancelled	Project closed	
2001250	Test	Test	Mar 23, 2022		Apr 4, 2022	Apr 7, 2022	\$6,400.00	Pre-Project Application Submitted For Approval	Pre-project application	N
2001249	Test	Test	Mar 23, 2022		Mar 28, 2022	Mar 31, 2022	\$0.00	Pre-Project Application Saved As Draft	Pre-project application	

02 Enter the Application ID.

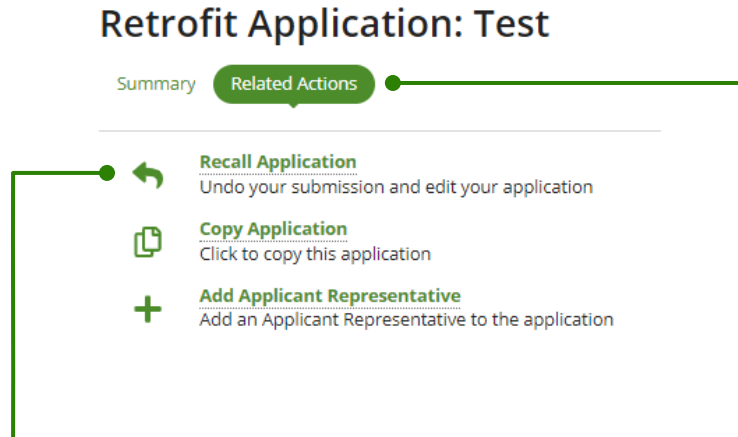
03 Click **Search**.

04 Click the Application ID.

Application Id	Company Name	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	Application Status Milestone	Head Office
2000807	Johnson Property Corp.	Lighting Retrofit -123 Main St	Dec 7, 2020	Electric, Greg	Feb 1, 2021	Aug 31, 2021	\$875.00	Pre-Project Application Submitted For Approval	Pre-project application	N

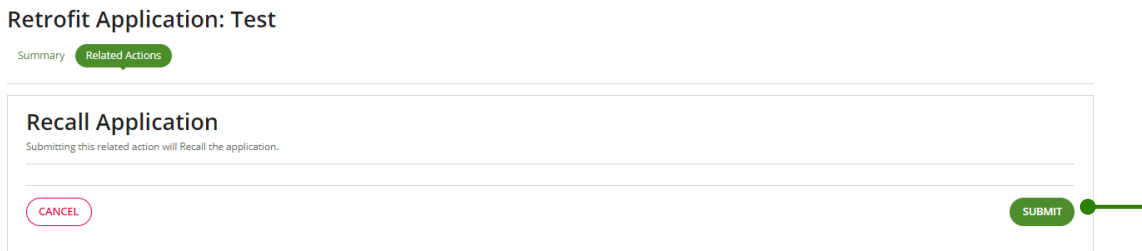
RECALLING AN APPLICATION

05 Click on the **Related Actions** tab.

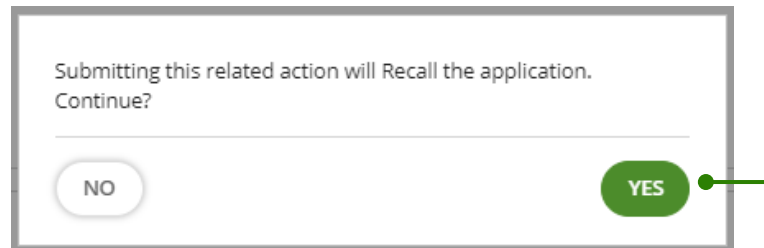


06 Click **Recall Application**.

07 Click **Submit**.



08 Click **Yes**.



Completing the above steps will return the application to the **Pre-Project Saved as Draft** stage, where required edits can be made before resubmission. The Applicant will receive an email notification to edit the application.



Note: If the Save on Energy Technical Reviewer has started reviewing the application, you will receive an error message stating you cannot recall the application. If edits are required, contact your Save on Energy Technical Reviewer to open the application for edits.

DELETING AN APPLICATION

The **Applicant** can delete an application before it has been submitted to the Save on Energy Technical Reviewer for approval.

Note: When you delete the application it cannot be recovered, even by technical support. If you wish to delete an application that has been submitted for approval, please contact the Save on Energy Technical Reviewer for assistance.

01 Click on the **Pending Actions** tab.

02 Enter the **Application ID**.

03 Press enter on your keyboard or click anywhere on the page for the search results to load.

04 Click on **Edit Pre-Project Application "Project ID: Project Name"**.

Name	Company Name	Application Name	Application Id	Task Created	Lead LDC	Application Status Milestone	Application Track
Edit Pre-Project Application 2000808: 123 Main Back Office	Johnson Property Corp	123 Main Back Office	2000808	12/22/2020 11:36 AM EST	Ontario IMO	Pre-project application	

05 Click **Delete** on the bottom left of the page.

06 Click **Delete Application**.

DELETE APPLICATION

Continuing will delete your application/submission and all related facilities and measures. You will not be able to recover this application. Please confirm that you wish to delete this application.

EDITING AN APPLICATION

TECHNICAL REVIEWER EDITING AN APPLICATION

The Save on Energy Technical Reviewer can make edits and approve the application **without having to send it back to the Applicant** to make or approve the changes.

If there are edits to be made once the Applicant submits an application for Pre-Project Application Review, the Save on Energy Technical Reviewer can make these edits and approve the application to move the status to Pre-Project Application Approved.

The **Applicant** and **Applicant Representative** can review the changes under **History and Comments**.

▼ History and Comments

User	User Role	Action Type	Action	Submitted To	Date and Time (EST)	Comment
		Reviewed by Service Provider Analyst	Accept	Applicant	10/28/2021 12:07 PM	
		Service Provider Analyst Comment	Save Changes	None	10/28/2021 12:06 PM	
		Service Provider Analyst Comment	Save Changes	None	10/28/2021 12:06 PM	
		Service Provider Analyst Comment	Allow SP Edits	None	10/28/2021 12:04 PM	
		Routed by Service Provider Analyst	Route Application	Service Provider Analyst	10/28/2021 12:03 PM	
	Applicant	Submitted by Applicant	The application has been submitted and confirmed, and the applicant agreed to the PA		10/28/2021 11:29 AM	
	Applicant	Applicant Comment	Submit	None	10/28/2021 11:28 AM	
	Applicant	Applicant Comment	Save to Draft	None	10/28/2021 09:30 AM	
						8 items

EDITING AN APPLICATION

The Save on Energy Technical Reviewer may need to return an application with recommended edits. **Applicants** or **Applicant Representatives** can make the required changes. You will receive an email notification to edit the application. Locate the Application ID in the notification email and continue to **Step 1**.

01 Click the **Applications** tab.

02 Enter the Application ID.

03 Click **Search**.

04 Click on the Application ID.

Application ID	Company Name	Address	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	Application Status Milestone	Head Office
2000810	Johnson Property Corp	123 Main - Basement	Dec 22, 2020		Mar 1, 2021	May 3, 2021	\$1,000.00	Pre-Project Application Returned For Edits	Pre-project review	N

05 Click the **History and Comments** section to review any comments made by the Save on Energy Technical Reviewer.

▼ History and Comments

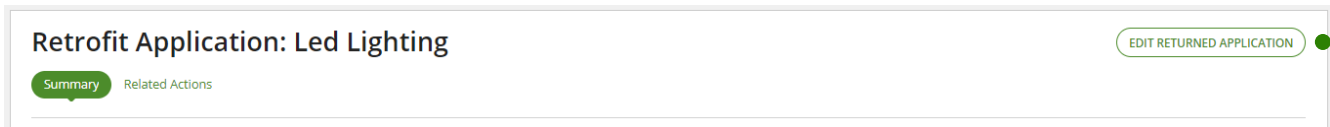
User	User Role	Action Type	Action	Submitted To	Date and Time (EST)	Comment
SOE Analyst	[Redacted]	Reviewed by Service Provider Analyst	Return For Revision to Applicant/App Rep	Applicant	12/22/2020 02:09 PM	Update Project Cost
SOE Analyst	[Redacted]	Routed by Service Provider Analyst	Route Application	Service Provider Analyst	12/22/2020 02:07 PM	
[Redacted]	Applicant	Submitted by Applicant	The application has been submitted and confirmed, and the applicant agreed to the PA		12/22/2020 01:42 PM	
[Redacted]	Applicant	Applicant Comment	Submit	None	12/22/2020 01:42 PM	

The **Return for Revision** action indicates that the Save on Energy Technical Reviewer has suggested edits.

The edits recommended by the Save on Energy Technical Reviewer are described in the **Comment** column.

EDITING AN APPLICATION

06 Click **Edit Returned Application** at the top right of the page.



Retrofit Application: Led Lighting

Summary Related Actions

EDIT RETURNED APPLICATION

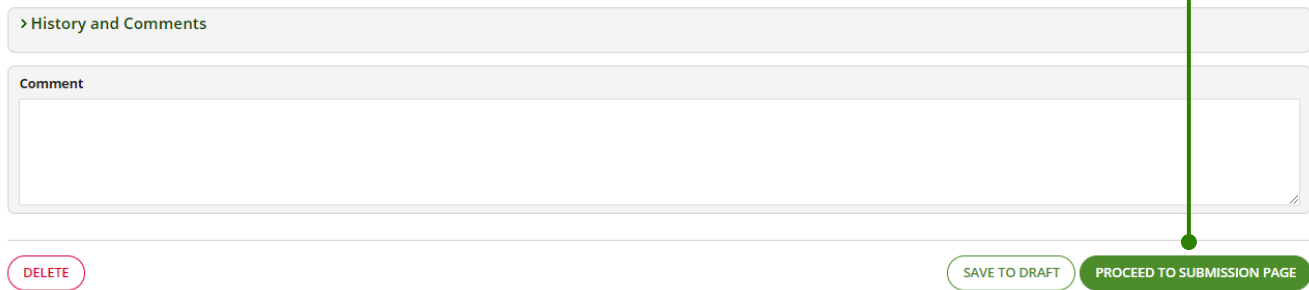


Note: If you receive an error message after clicking “Edit Returned Application,” please ensure the application is not open under the Applicants or Applicant Representatives “Pending Actions” tab. If the issue persists, please reach out to a Save on Energy Technical Reviewer for assistance.

07 Make the required edits to the application.

08 Enter a comment, if required.

09 Click **Proceed to Submission Page**.



> History and Comments

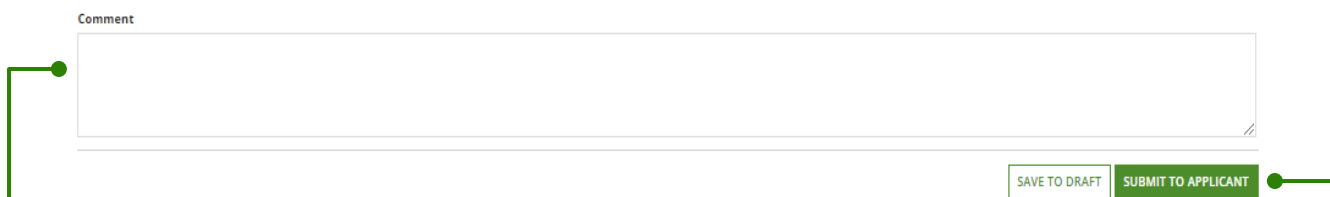
Comment

DELETE SAVE TO DRAFT PROCEED TO SUBMISSION PAGE



Note: Only an **Applicant** can submit the application. If an Applicant Representative edits the application, they must forward it to the Applicant, who submits it to the Save on Energy Technical Reviewer.

10 Click **Submit to Applicant**.



Comment

SAVE TO DRAFT SUBMIT TO APPLICANT

Enter a comment to the Applicant if required.

EDITING AN APPLICATION

- 11** The applicant will select **Yes** to indicate that all the information in the application is correct and to indicate that they have read and agree to the Participant Agreement. This is where Applicants agree to the Terms and Conditions of the program under which they will receive the incentive. Any questions about the Participant Agreement can be directed to a Save on Energy Representative.

Application Approval

You have now reached the final stage before your RETROFIT Application can be submitted for review and pre-approval. If you commence your Project prior to receiving pre-approval, you will not be eligible to receive a Participant Incentive.

PRIOR TO Commencing your Project(s)

Ensure that the IESO has pre-approved this Application and your Participant Agreement

AFTER Completing your Project(s)

You must submit evidence of Project completion in order to receive your Participant Incentive

This application will be reviewed and processed by the IESO

I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. *

Yes

I have read and agree to the Participant Agreement. *

Yes

From now all communication for this application should go to my App Rep.

Yes

No

Review our [Pre-Project Application Checklist \(pdf\)](#)

And our [Post-Project Submission Checklist \(pdf\)](#)

BACK TO APPLICATION

SUBMIT

- 12** If you wish to have your Applicant Representative handle all communication with the Service Provider Technical Reviewer during the review process of your application, select **Yes**.

- 13** Click **Submit**.

The application will now be forwarded to the Save on Energy Technical Reviewer for review.

SUBMITTING AN ADVANCE INCENTIVE REQUEST

The **Applicant** or **Applicant Representative** can submit an advance incentive request if the project meets the advance incentive criteria. An advance incentive request is approved as part of the application’s initial review, not after the application’s pre-approval.

APPLYING FOR SOCIAL HOUSING INCENTIVE

You can apply for a **social housing adder** if your facility is a social housing provider.

01 Select **Multi-Residential – Social Housing Provider** when completing the **Facility Type** of the **Basic Details** section for the facility.

The screenshot shows the 'Facility Details' form with the following fields and values:

- Facility Name *: TEST-SHA
- Address 1 *: 393 University Avenue
- Facility Type *: Multi-Residential - Social Housing Provider
- Ownership Type *: -- Select a value --
- Address 2/Unit #: [Empty]
- Address 3: [Empty]
- Electric Utility Account *: [Empty]
- City *: [Empty]
- Province: ON
- Are you applying for a Social Housing Adder? *: Y N
- What percentage of your incentive do you want to receive in advance? *: [Empty]
- Postal Code *: [Empty]
- Estimated Project Start Date *: mm/dd/yyyy
- Estimated Project End Date *: mm/dd/yyyy
- Local Distribution Company: Ontario I/MO

Callout 01 points to the Facility Type dropdown menu.

Callout 02 points to the 'Are you applying for a Social Housing Adder?' radio button selection.

02 Select **Y** for Social Housing Adder.

03 Enter the **percentage** of the incentive that you would like to receive in advance. The maximum value is **50%**.

APPLYING FOR SOCIAL HOUSING INCENTIVE

04 Complete the rest of the facility information and **submit the facility** (see **Adding Facilities** on page 46).

Estimated Calculation Results					
	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	\$5,000.00	67,968.060	9.654	11.190	\$1,000.00
Total	\$5,000.00	67,968.060	9.654	11.190	\$1,000.00

Note: Incentives will be capped based on the Retrofit Program Rules

Advance Incentive			
Total Advance Incentive	\$0.00	Max SHA Advance Incentive	\$1,000.00
Estimated SHA Amount	\$1,000.00	Approved SHA Advance Incentive	\$1,000.00

The advance incentive amounts are automatically calculated once all required facility information is entered.

The application will now include the request for a social housing advance incentive. The request will be subject to review by a Save on Energy Technical Reviewer.

SUBMITTING AN ADVANCE INCENTIVE INVOICE

The **Applicant** or **Applicant Representative** can submit an advance incentive invoice, if applicable, once the advance incentive is pre-approved.

Note: The final incentive invoice for the complete incentive amount may only be submitted after the post-project approval.

01 Click on the **Applications** tab.

Application Id	Company Name	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	Application Status Milestone	Head Office
2000811	Johnson Property Corp	5 Social Housing Way	Dec 22, 2020		Jan 4, 2021	Mar 1, 2021	\$750.00	Pre-Project Application Approved	Pre-project review	N

02 Enter the Application ID.

03 Click the **Search** button.

04 Click on the Application ID.

05 Review the advance incentive details in the **Estimated Calculation Results** section of the application.

Estimated Calculation Results

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	\$5,000.00	67,968.060	9.654	11.190	\$7,500.00
Total	\$5,000.00	67,968.060	9.654	11.190	\$7,500.00

Note: Incentives will be capped based on the Retrofit Program Rules

Advance Incentive	
Total Advance Incentive	\$0.00
Estimated SHA Amount	\$7,500.00
Max SHA Advance Incentive	\$7,500.00
Approved SHA Advance Incentive	\$7,500.00

This is the maximum amount you can submit an invoice for.

SUBMITTING AN ADVANCE INCENTIVE REQUEST

06 Click **Submit/Edit Advanced Incentive Invoice** at the top right of the page.

Retrofit Application: Social Housing 2

Summary Related Actions

SUBMIT/EDIT ADVANCE INCENTI...

07 Click **Upload**.



Retrofit Application: Social Housing 2

Summary Related Actions

Application Invoice Submission

Note: Please do not mail invoices to IESO Accounts Payable

Invoice Amount \$1,050.00

Social Housing 2

Comment

Resources for submitting an incentive invoice

- Invoice Guide (pdf)
- Sample Invoice Template (pdf)

Advance Incentive Invoice *

UPLOAD Drop file here

CANCEL

SUBMIT

08 Double-click the invoice document you want to attach.

09 Enter a comment, if required (comments are optional).

10 Click **Submit**.

The Save on Energy Technical Reviewer will now receive a notification to review the advance incentive invoice.

AMENDING AN APPROVED APPLICATION

The **Applicant** or **Applicant Representative** can amend an application after it has been pre-approved by the Save on Energy Technical Reviewer if the project has not been started.



Note: Once a post-project submission has been started, the pre-project application cannot be amended. An amendment can only be completed once per application.

01 Click on the **Applications** tab.

The screenshot shows the 'APPLICATIONS' tab interface. At the top, there are three tabs: 'PENDING ACTIONS', 'APPLICATIONS', and 'BEGIN NEW APPLICATION'. Below the tabs is a search and filter section with a search input field containing 'Search Retrofit Applications', a 'SEARCH' button, and several dropdown filters for 'STARTED ON', 'EST. PROJECT START DATE', 'EST. PROJECT COMPLETION DATE', 'INCENTIVE', 'STATUS', 'APPLICATION STATUS MILESTONE', 'HEAD OFFICE?', and 'APPLICATION TRACK'. Below the filters is a table with the following columns: Application Id, Company Name, Application Name, Started On, Applicant Rep, Est. Project Start Date, Est. Project Completion Date, Incentive, Status, Application Status Milestone, and Head Office. A single row of data is visible in the table.

Application Id	Company Name	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	Application Status Milestone	Head Office
2000807	Johnson Property Corp.	Lighting Retrofit -123 Main St	Dec 7, 2020	Electric, Greg	Feb 1, 2021	Aug 31, 2021	\$875.00	Pre-Project Application Approved	Pre-project review	N

02 Enter the Application ID.

03 Click **Search**.

04 Click on the Application ID.

AMENDING AN APPROVED APPLICATION

05 Click on the **Related Actions** tab.

Retrofit Application: Lighting Retrofit -123 Main St

Summary **Related Actions**

- Initiate Application Amendment**
Click to initiate a new amendment to request a change to your pre-approved application
- Prepare Post-Project Submission**
Click to initiate a post-project submission for your application
- Copy Application**
Click to copy this application

06 Click **Initiate Application Amendment**.

07 Enter the reason for the amendment. This comment is mandatory.

Application Amendment Initiation

Reason*

CANCEL INITIATE

08 Click **Initiate**.

09 Click **Yes**.

This Amendment is subject to approval. Are you sure, you want to continue?

NO YES

AMENDING AN APPROVED APPLICATION

10 Make any required changes to the application.

11 Select the box to certify work for the application has not been started.

> History and Comments

Comment

I certify that work for this Application has not been started *

CANCEL AMENDMENT SAVE TO DRAFT SEND TO APP REP **PROCEED TO SUBMISSION PAGE**

12 Click **Proceed to Submission Page**.



Note: Only an **Applicant** can submit the application. If an Applicant Representative amends the application, they must forward it to the Applicant, who submits it to the Save on Energy Technical Reviewer.

13 Click **Submit to Applicant**.

> History and Comments

Comment

Enter a comment to the Applicant if required.

SAVE TO DRAFT **SUBMIT TO APPLICANT**

AMENDING AN APPROVED APPLICATION

14 The Applicant will select **Yes** to indicate that all the information in the application is correct and to indicate that they have read and agree to the Participant Agreement. This is where Applicants agree to the Terms and Conditions of the program under which they will receive the incentive. Any questions about the Participant Agreement can be directed to a Save on Energy Representative.

Application Approval

You have now reached the final stage before your RETROFIT Application can be submitted for review and pre-approval. If you commence your Project prior to receiving pre-approval, you will not be eligible to receive a Participant Incentive.

PRIOR TO Commencing your Project(s)
Ensure that the IESO has pre-approved this Application and your Participant Agreement

AFTER Completing your Project(s)
You must submit evidence of Project completion in order to receive your Participant Incentive

This application will be reviewed and processed by the IESO

I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. *

Yes

I have read and agree to the Participant Agreement. *

Yes

From now all communication for this application should go to my App Rep.

Yes

No

Review our [Pre-Project Application Checklist \(pdf\)](#)

And our [Post-Project Submission Checklist \(pdf\)](#)

BACK TO APPLICATION

SUBMIT

15 If you wish to have your Applicant Representative handle all communication with the Service Provider Technical Reviewer during the review of your application, select **Yes**.

16 Click **Submit**.

The Save on Energy Technical Reviewer will now receive a notification to review the amended application.



Post-Project Submissions

CREATING A POST-PROJECT SUBMISSION

The Applicant or Applicant Representative creates the post-project submission once the application status is "Pre-Project Application Approved" and the project has been completed.

BEGINNING A POST-PROJECT SUBMISSION

01 Click on the **Applications** tab.

The screenshot shows the 'APPLICATIONS' tab selected in the top navigation bar. Below the navigation bar is a search and filter section with a search input field and several dropdown menus for filtering by 'STARTED ON', 'EST. PROJECT START DATE', 'EST. PROJECT COMPLETION DATE', 'INCENTIVE', 'STATUS', 'APPLICATION STATUS MILESTONE', 'HEAD OFFICE?', and 'APPLICATION TRACK'. Below this is a table of applications with the following data:

Application ID	Company Name	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	Application Status Milestone	Head Office
2000808	Johnson Property Corp	123 Main Back Office	Dec 7, 2020	Electric, Greg	Jan 25, 2021	Mar 31, 2021	\$660.00	Pre-Project Application Approved	Pre-project review	N

02 Enter the Application ID.

03 Click **Search**.

04 Click on the Application ID.

05 Click **Prepare Post-Project Submission** at the top right of the page.

The screenshot shows the details for a specific application: 'Retrofit Application: 123 Main Back Office'. Below the title, there are tabs for 'Summary' and 'Related Actions'. In the top right corner of the page content area, there is a button labeled 'PREPARE POST-PROJECT SUBMIS...'. A green callout line points from the text above to this button.

BEGINNING A POST-PROJECT SUBMISSION

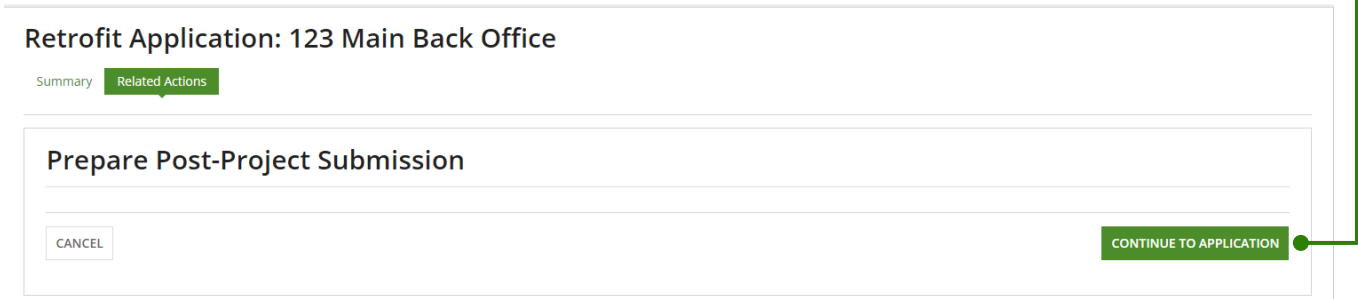
06 Click **Continue to Application**.

Retrofit Application: 123 Main Back Office

Summary **Related Actions**

Prepare Post-Project Submission

CANCEL **CONTINUE TO APPLICATION**



This step creates a post-project submission to be completed and brings you to the post-project submission main page.



Note: If you receive an error message after clicking “Prepare Post-Project Submission,” please ensure the application is not open under the Applicant or Applicant Representative “Pending Actions” tab. If the issue persists, please reach out to a Save on Energy Technical Reviewer for assistance.

ENTERING PROJECT DATA

Sections of the application must be updated before the post-project submission can be submitted.

01 Click the **Edit** button under the **Manage Facilities** section to open and edit a facility.

Manage Facilities

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
TEST	393 University Ave	Toronto	\$3,200.00	TEST	Complete	Edit
TEST	393 University Ave	Toronto	\$3,200.00	TEST	Incomplete	Edit

[+ ADD NEW FACILITY](#)

Facility status will show as "Incomplete" until steps 2-11 are completed.

02 Update the **project start date** and **project end date**, if different than initial submission.

Basic Details

Facility Name 123 Main Back Office
Facility Type Commercial - Small Office
Electric Utility Account 112233445566
Ownership Type Owner

Address 1 123 Main Street
Address 2/Unit #
City Toronto
Province ON
Address 3
Postal Code M1G 2W3

Actual Project Start Date * 12/21/2020
Actual Project End Date * 12/29/2020
Estimated value: 1/25/2021 Estimated value: 3/31/2021

The estimated project start date and end date from the pre-approval are shown as well.

ENTERING PROJECT DATA

03 Click the **Edit** button under the **Prescriptive Measures** section to open a prescriptive measure.

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status		
Lighting (2021-2024)	8' T8 LED Lamp	<= 43W >= 3200 Lumens	300	\$2,400.00	Incomplete	Edit	X

Measure status will show as "Incomplete" until steps 4-6 are completed.

04 Enter the **actual quantity** for the measure.

05 Update any other mandatory fields as required.

Measure Category	Lighting (2021-2024)	Manufacturer	HX	Measure Unit	per lamp
End Use	Lighting - Other Commercial Buildings	Actual Quantity	82		
Conservation Measure Name	LED REFLECTOR (FLOOD/SPOT) LAMP PIN & SCREW BASE		Estimated value: 82		
Conservation Measure Description	<= 20W >= 800 Lumens	Model Number	HXNF-L230EXP		
Incentive Per Unit	\$8.00	ES DLC Code			
Eligibility Criteria	This measure is applicable to pin and/or screw base BR's, PAR's, MR's, and R's style LED lamps. The LED lamp must be classified as a Reflector (flood/spot) Lamp by Energy Star and must be approved and listed on the Energy Star Certified Light Bulbs List	kWh Savings	9,019.549 kWh		
Assumed Base Case	43W - 60W Halogen or Incandescent Lamp		Estimated value: 9,019.549 kWh		
		Peak Demand Savings	1.424 kW		
			Estimated value: 1.424 kW		
		kW Reduction	3.157 kW		
			Estimated value: 3.157 kW		
		Actual Incentive	\$656.00		
			Estimated value: \$656		

Back to Facility

The kWh Savings, Peak Demand Savings, and kW Reduction values are automatically calculated when you enter the actual quantity.

The estimated values from the pre-approval are provided.

ENTERING PROJECT DATA

06 Click **Apply** to add the measure to the facility.

CANCEL DELETE

SAVE TO DRAFT APPLY

Click **Save to Draft** if you want to save a draft of the measure.

07 Repeat steps 3-6 until you have entered the actual quantity for all prescriptive measures in the facility.

08 Enter the **actual facility cost** for all prescriptive measures. Click anywhere on the page for the **Recalculate** button to appear.

Prescriptive measures will show as complete when steps above are complete.

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status	
Lighting (2021-2024)	8' T8 LED Lamp	<= 43W >= 3200 Lumens	300	\$2,400.00	Complete	Edit

Facility Cost Prescriptive *

6000

Prescriptive measure costs are limited to the equipment purchased and installed, labour for the installation of the equipment by suppliers and costs to dispose of or decommission the replaced equipment.

+ ADD NEW PRESCRIPTIVE MEASURES

RECALCULATE

You can add a new prescriptive measure in the post-project submission phase, but it must be in the same category as a measure that was pre-approved.

09 Click **Recalculate**.

ENTERING PROJECT DATA

10 Review the **Actual Calculation Results** section for the facility.

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	\$7,800.00 <small>Estimated value: \$8,000.00</small>	23,747.384 <small>Estimated value: 23,747.384</small>	3.748 <small>Estimated value: 3.748</small>	8.312 <small>Estimated value: 8.312</small>	\$2,586.00 <small>Estimated value: \$2,586.00</small>
Total	\$7,800.00 <small>Estimated value: \$8,000.00</small>	23,747.384 <small>Estimated value: 23,747.384</small>	3.748 <small>Estimated value: 3.748</small>	8.312 <small>Estimated value: 8.312</small>	\$2,586.00 <small>Estimated value: \$2,586.00</small>

Project Type Prescriptive

11 Click **Apply** to confirm the updates.

12 Repeat **Steps 1-11** if your application has more than one facility.

13 Under the **Manage Facilities** section, the facility will now show a status of **"Complete."**

Manage Facilities

Facility Name	Address 1	City	Facility Capped Incentive Amount	Project Description	Status	
TEST- SHA	393 University Avenue	Toronto	\$13,960.00	TEST - Social Housing Adder	Complete	Edit
TEST- SHA	393 University Avenue	Toronto	\$2,400.00	TEST - Social Housing Adder	Complete	Edit

Once all facilities in the application are marked as "Complete," the post-project submission is ready to be submitted.

FORWARDING THE POST-PROJECT SUBMISSION TO THE APPLICANT

Applicant Representatives can prepare the application for post-project submission, but it must be sent to the Applicant for final submission. Only the **Applicant** can submit an application to the Save on Energy Technical Reviewer.

01 Enter a comment to the Applicant if required.

> History and Comments

Comment

SAVE TO DRAFT SUBMIT TO APPLICANT

02 Click **Submit to Applicant**.

The Applicant will receive an email notification to review the post-project submission.

SUBMITTING THE POST-PROJECT SUBMISSION

Only the **Applicant** can submit the post-project submission to the Save on Energy Technical Reviewer.



If the Applicant created the post-project submission, continue to Step 6.

If an Applicant Representative created the post-project submission, the Applicant must review it before submission. Continue to Step 1.

01 Click the **Pending Actions** tab.

02 Enter the Application ID.

03 Click **Reset**, located below the "Task Created From" field.

04 Click on **Edit Post-Project Application "Project ID: Project Name"**

Edit Post-Project Application 2000808: 123 Main Back Office	Johnson Property Corp	123 Main Back Office	2000808	12/29/2020 4:45 PM EST	Ontario IMO	Post-project submission	Prescriptive
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05 Review all components of the post-project submission and make any edits where required.

SUBMITTING THE POST-PROJECT SUBMISSION

06 Enter a comment, if required.

> History and Comments

Comment

CANCEL

SAVE TO DRAFT

SEND TO APP REP

PROCEED TO SUBMISSION PAGE

07 Click **Proceed to Submission Page**.

08 Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agree to the Participant Agreement. This is where Applicants agree to the Terms and Conditions of the program under which they will receive the incentive. Any questions about the Participant Agreement can be directed to a Save on Energy Representative.

Application Approval

You have now reached the final stage before your RETROFIT Application can be submitted for review and pre-approval. If you commence your Project prior to receiving pre-approval, you will not be eligible to receive a Participant Incentive.

PRIOR TO Commencing your Project(s)

Ensure that the IESO has pre-approved this Application and your Participant Agreement

AFTER Completing your Project(s)

You must submit evidence of Project completion in order to receive your Participant Incentive

This application will be reviewed and processed by the IESO

I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. *

Yes

I have read and agree to the Participant Agreement. *

Yes

From now all communication for this application should go to my App Rep.

Yes

No

Review our [Pre-Project Application Checklist \(pdf\)](#)

And our [Post-Project Submission Checklist \(pdf\)](#)

BACK TO APPLICATION

SUBMIT

09 If you wish to have your Applicant Representative handle all communication with the Service Provider Technical Reviewer during the review process of your application, select **Yes**.

10 Click **Submit**.

The Save on Energy Technical Reviewer will now receive a notification to review the post-project submission.

Submitting an Incentive Invoice

A final incentive invoice must be submitted by the **Applicant** once the post-project submission has been approved by the Save on Energy Technical Reviewer and the application status is **Post-Project Submission Approved**.

01 Click on the **Applications** tab.

HOME PENDING ACTIONS **APPLICATIONS** BEGIN NEW APPLICATION

Q Search Retrofit Applications SEARCH

STARTED ON | Any EST. PROJECT START DATE | Any

EST. PROJECT COMPLETION DATE | Any INCENTIVE | Any STATUS | Any

APPLICATION STATUS MILESTONE | Any HEAD OFFICE? | Any APPLICATION TRACK | Any

02 Enter the **Application ID**.

03 Click **Search**.

04 Click the **Application ID**.

2000808	Johnson Property Corp	123 Main Back Office	Dec 7, 2020	Electric, Greg	Jan 25, 2021
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05 Click **Related Actions**.

Retrofit Application #900001

Summary **Related Actions**

- Submit/Edit Final Invoice**
- Cancel Application**
Cancel the current application, ending all sub-processes.

06 Click **Submit/Edit Final Invoice**.

SUBMITTING AN INCENTIVE INVOICE

If you are unsure what information to include in your invoice, please see **Invoice Guide (pdf)** and **Sample Invoice Template (pdf)**.

Application Invoice Submission

The screenshot shows a web form for submitting an incentive invoice. It includes a note, a resources box, a form with fields for Invoice Amount, Application, and Comment, and buttons for Upload and Submit. Green callout lines connect numbered steps to specific form elements.

Note: Please do not mail invoices to IESO Accounts Payable

Resources for submitting an incentive invoice

- [Invoice Guide \(pdf\)](#)
- [Sample Invoice Template \(pdf\)](#)

Final Invoice*

07 Click **Upload**.

08 Double-click the document you want to attach.

09 Enter a comment.

10 Click **Submit**.

You can also drag files to the **Drop Files Here** field.

The Save on Energy Technical Reviewer will now receive an email notification to review the invoice.