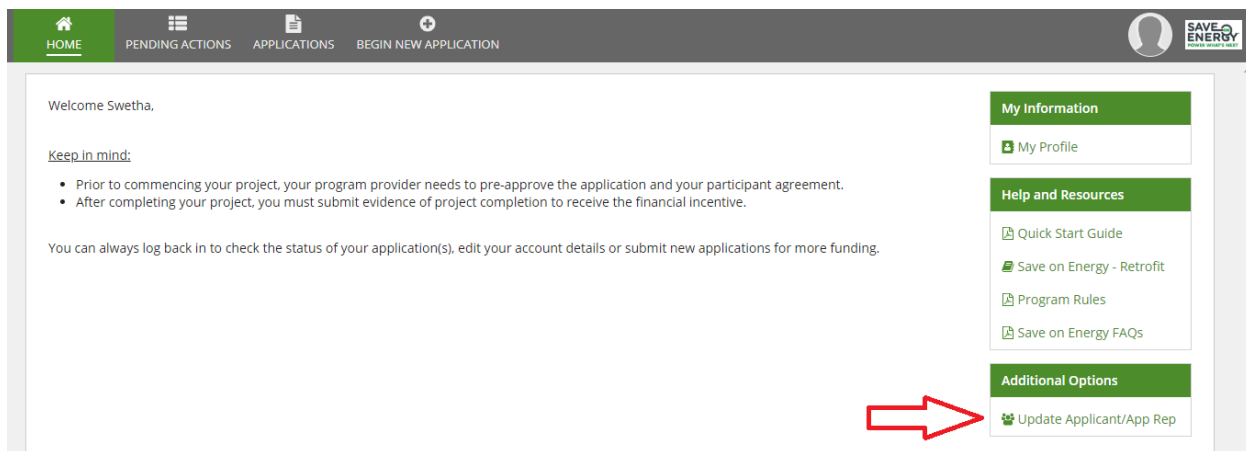


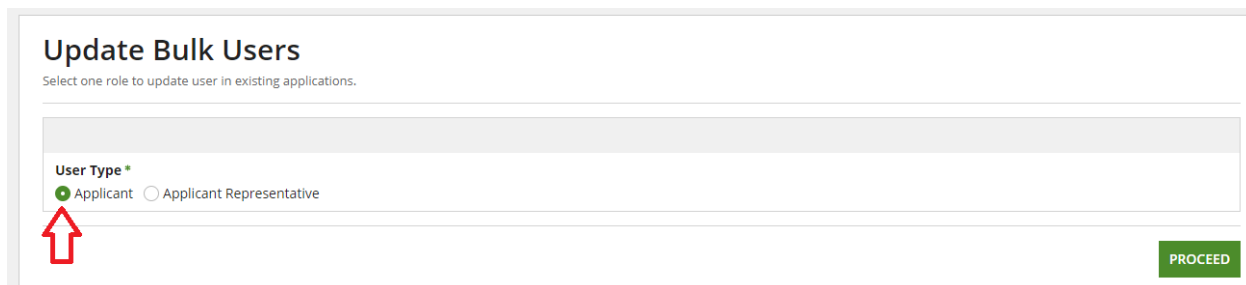
# ADDITIONAL FUNCTIONALITY IN THE RETROFIT PORTAL FOR APPLICANT REPRESENTATIVES

## 1. AS THE APPLICANT REPRESENTATIVE – UPDATE THE APPLICANT FOR MY APPLICATIONS

1. From the home screen, click on update “Update Applicant/App Rep” under the “Additional Options” section.



2. Select “Applicant” for the “User Type” and click on “Proceed.”



3. Enter the existing Applicant email address and the new Applicant email address. 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" value="swetha.yallala@ieso.ca"/>		<input type="text" value="applicantret1708@gmail.com"/>	
First Name	Last Name	First Name	Last Name
Swetha	Yallala	Swetha	Ret1708

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

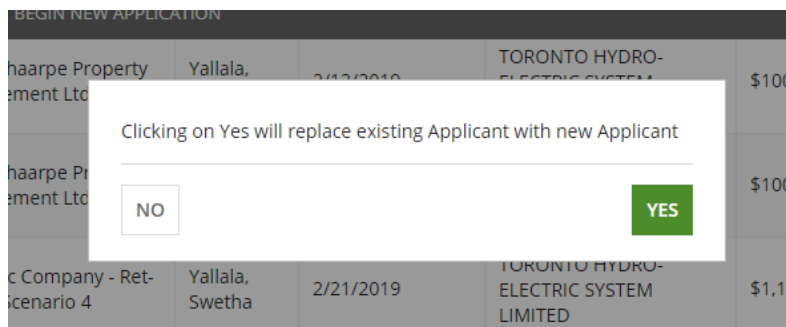
#### Select Application(s) to change Applicant \*

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

5. Confirm the change by selecting "Yes."



6. The system will provide you with a summary of the changes. Note that these changes need to be accepted by the existing Applicant in order to be completed (see step 7).

## 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

swetha.yallala@ieso.ca (Swetha Yallala)

#### New Applicant

applicantret1708@gmail.com (Swetha Ret1708)

#### Selected Application IDs

2000143,2000242

#### Skipped Application IDs

N/A

#### Updated Application IDs

2000143,2000242

Note: If applications are listed under the "Skipped Application IDs" section, there is an approval task pending with the existing Applicant.

7. The existing Applicant will receive tasks under the "Pending Actions" tab to accept the change initiated by the Applicant Representative for each selected application.

**Task List**

Search By:

Application Id	Company Name	Application Name	Lead LDC	Application Status Milestone
<input type="text"/>	<input type="text"/>	<input type="text"/>	--- Select a Value ---	--- Select a Value ---
Task Created From	Task Created To	Application Track		
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	--- Select a Value ---		

RESET

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	

8. The Applicant must click on "Approve" to enact 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

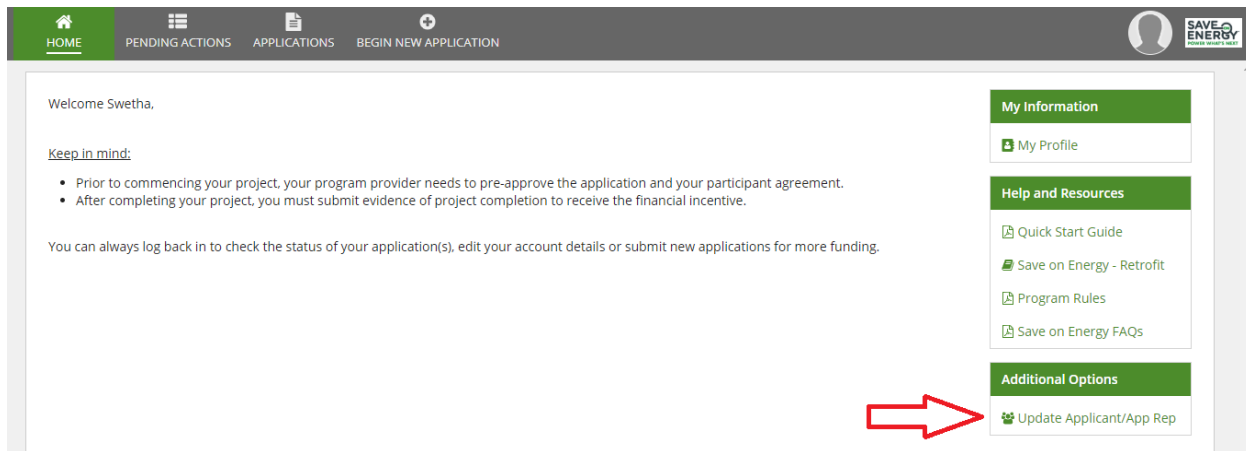
**Application ID** 2000143  
**Current Applicant** swetha.yallala@ieso.ca (Swetha Yallala)  
**New Applicant** applicantret1708@gmail.com (Swetha Ret1708)

REJECT

APPROVE

## 2. AS THE APPLICANT REPRESENTATIVE – UPDATE THE APPLICANT REPRESENTATIVE FOR MY APPLICATIONS

1. From the home screen, click on update "Update Applicant/App Rep" under the "Additional Options" section.



2. Select "Applicant Representative" for the "User Type" and click on "Proceed."

## Update Bulk Users

Select one role to update user in existing applications.

User Type \*

Applicant  Applicant Representative

PROCEED

3. 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.

### ▼ Applicant Representative selection

Existing Applicant Representative		New Applicant Representative	
<b>Applicant Representative Email *</b> apprep2672@gmail.com		<b>New Applicant Representative Email *</b> apprepjs1@sharklasers.com	
<b>First Name</b> Apprep	<b>Last Name</b> 2672	<b>First Name</b> Apprepjs1	<b>Last Name</b> Lname

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

<input checked="" type="checkbox"/>	2000780	Testval3	Test_postal Code_swetha Application	2672, Apprep	11/22/2019	Ontario IMO	\$247,504.50	Pre-Project Application Approved	Pre-project review
<input checked="" type="checkbox"/>	2000782	Testval4_no Lead Ldc	Testval4_no Lead Ldc	2672, Apprep	11/22/2019	Ontario IMO	\$92,502.50	Pre-Project Application Submitted For Approval	Pre-project application

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CANCEL

REASSIGN

5. Confirm the change by selecting "Yes."

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

6. The system will provide you with a summary of the changes.

# Completion Status

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## ***Summary of Change***

### **Previous Applicant Representative**

apprep2672@gmail.com (Apprep 2672)

### **New Applicant Representative**

apprepjs1@sharklasers.com (Apprepjs1 Lname)

### **Selected Application IDs**

2000780,2000782

### **Skipped Application IDs**

N/A

### **Updated Application IDs**

2000780,2000782