

# ADDITIONAL FUNCTIONALITY IN THE RETROFIT PORTAL FOR APPLICANTS

## 1. AS THE APPLICANT – ADD AN APPLICANT REPRESENTATIVE AT ANY POINT AFTER CREATING A NEW APPLICATION

1. From the Application page, 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
2001038	Royal Envelope		Jul 22, 2020				\$0.00	Pre-Project Application Saved As Draft	Pre-project application	
2001037	Testing Measure Expiry	Asdf	Jul 21, 2020		Jul 21, 2020	Jul 22, 2020	\$4,000.00	Pre-Project Application Submitted For Approval	Pre-project application	N




2. Click on “Related Actions” from the application.


### Retrofit Application: Asdf

Application Id	Current Status	Lead LDC	Head Office App	Submission Date
Asdf 2001037	Pre-Project Application Submitted For Approval	Ontario IMO	✗	07/21/2020

### 3. Click on "Add Applicant Representative".

Summary **Related Actions**

-  **Recall Application**  
Related action process to recall the application
-  **Copy Application**  
Click to copy this application
-  **Add Applicant Representative**  
Add an Applicant Representative to the application



### 4. Enter Applicant Representative's email address and click on "Add". This will complete the change.

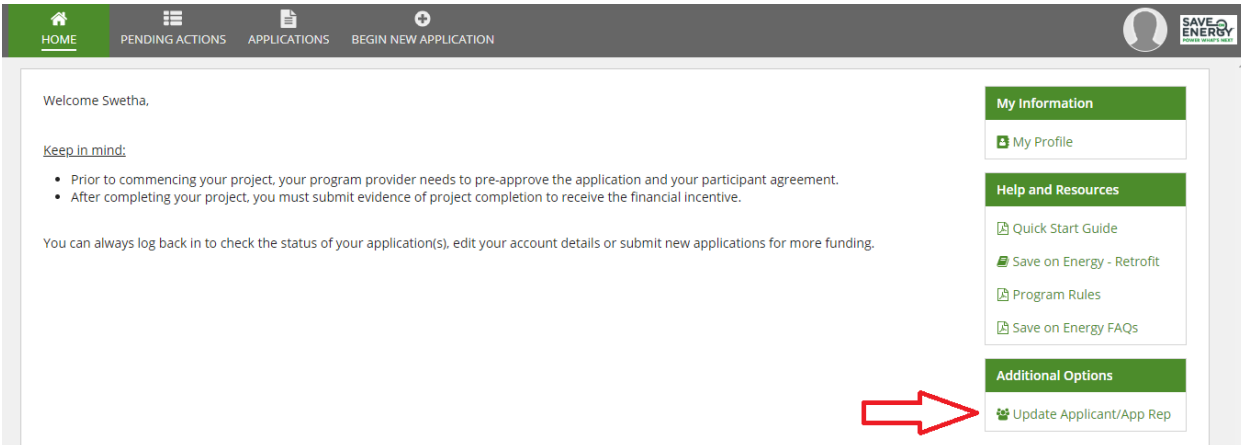
### Add Applicant Representative

Select Applicant Representative Email to add \*

<b>First Name</b>	<b>Last Name</b>
Apprep	2672

## 2. AS THE APPLICANT – 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."

### Update Bulk Users

Select one role to update user in existing applications.

**User Type \***

Applicant
  Applicant Representative

PROCEED

3. Enter 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	
<b>Applicant Email *</b> swetha.yallala@ieso.ca		<b>New Applicant Email *</b> <input type="text" value="applicantret1708@gmail.com"/>	
<b>First Name</b> Swetha	<b>Last Name</b> Yallala	<b>First Name</b> Swetha	<b>Last Name</b> Ret1708

4. 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."

#### ▼ Applications associated with Applicant To Be Removed

**Search By:**

**Search**

**Application Track** 
**Application Status Milestone** 
**Application Status**

RESET

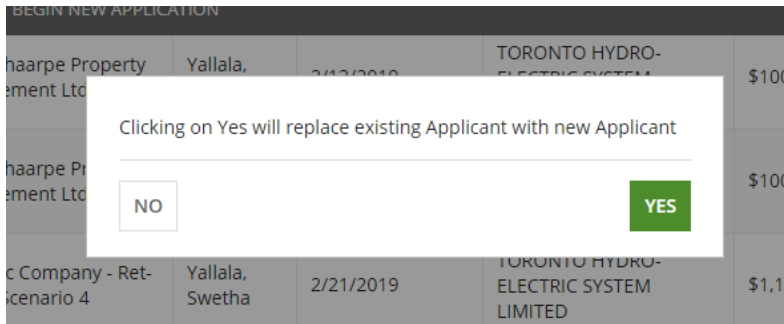
#### Select Application(s) to change Applicant \*

<input type="checkbox"/>	Application id ↑	Application Name	Company Name	Applicant Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone
<input checked="" type="checkbox"/>	102263	asdf	Red Diamond Properties Ltd.	Yallala, Swetha	12/12/2018	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED	\$15,303.59	Post-Project Submission Saved As Draft	Post-project submission
<input checked="" type="checkbox"/>	102340	asdf	Elmcrest Land Development Inc.	Yallala, Swetha	7/28/2011	Ontario IMO	\$1,496.00	Post-Project Submission Approved	Post-project review

CANCEL

REASSIGN

5. Confirm the change by selecting "Yes."



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

### Completion Status

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***Summary of Change***

**Previous Applicant**  
swetha.yallala@ieso.ca (Swetha Yallala)

**New Applicant**  
applicantret1708@gmail.com (Swetha Ret1708)

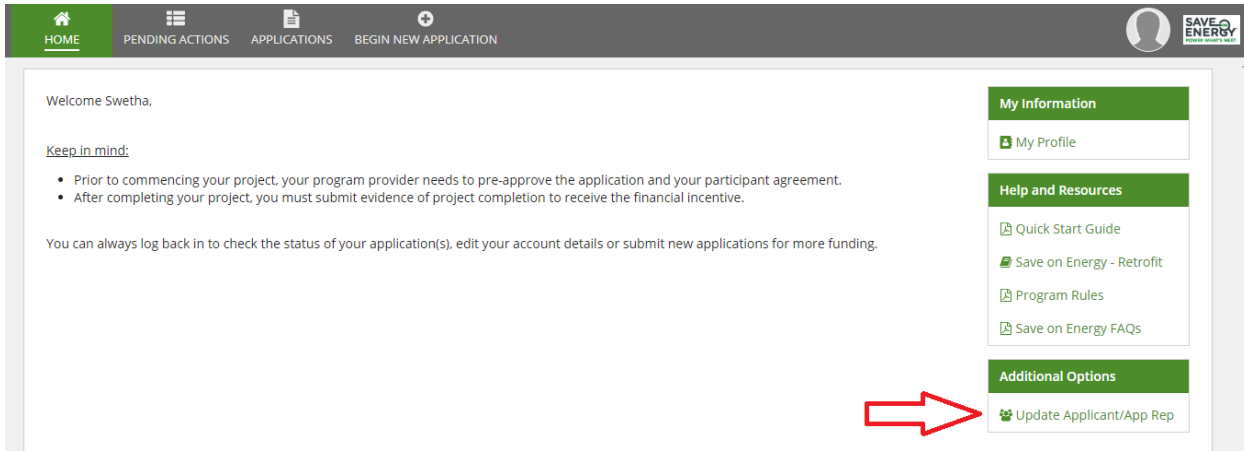
**Selected Application IDs**  
102263,102340

**Skipped Application IDs**  
N/A

**Updated Application IDs**  
102263,102340

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

1. From the home screen, click on "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.

The screenshot shows a form titled 'Update Bulk Users'. The 'User Type' field has two radio button options: 'Applicant' and 'Applicant Representative'. The 'Applicant Representative' option is selected, indicated by a green dot and a red arrow pointing to it. A green 'PROCEED' button is located to the right of the form.

3. Enter the existing Applicant Representative email address and 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

The screenshot shows a form titled 'Bulk Change Applicant Representative'. It has two columns: 'Existing Applicant Representative' and 'New Applicant Representative'. Each column has a text input field for 'Applicant Representative Email \*'. Below each email field are two text input fields for 'First Name' and 'Last Name'. Red arrows point to the 'First Name' fields in both columns.

Existing Applicant Representative		New Applicant Representative	
Applicant Representative Email *		New Applicant Representative Email *	
geerthanan.thiviyara@eso.ca		apprep2672@gmail.com	
First Name	Last Name	First Name	Last Name
Geerthanan	Thiviyarajah	Apprep	2672

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

## ▼ Applications associated with Applicant Representative To Be Removed

Search By:

Search

Search Applications

Application Track: --- Select a Value ---

Application Status Milestone: --- Select a Value ---

Application Status: --- Select a Value ---

RESET

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

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	Thiviyarajah, Geerthanah	3/31/2019	Ontario IMO	\$3,000.00	Pre-Project Application Under Review	Pre-project review
<input checked="" type="checkbox"/>	2000242	Apprep	Ret-1252	Thiviyarajah, Geerthanah	3/29/2019	Ontario IMO	\$65,000.00	Pre-Project Application Returned For Edits	Pre-project review

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CANCEL

REASSIGN

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

## Completion Status

### Summary of Change

#### Previous Applicant Representative

geerthanah.thiviyara@ieso.ca (Geerthanah Thiviyarajah)

#### New Applicant Representative

apprep2672@gmail.com (Apprep 2672)

#### Selected Application IDs

2000143,2000242

#### Skipped Application IDs

N/A

#### Updated Application IDs

2000143,2000242

## 4. AS THE APPLICANT – ACCEPT AN APPLICANT UPDATE INITIATED BY AN APPLICANT REPRESENTATIVE FOR MY APPLICATIONS

1. The existing Applicant will receive a task under the "Pending Actions" tab to accept a change initiated by the Applicant Representative for an application.

HOME PENDING ACTIONS APPLICATIONS BEGIN NEW APPLICATION

SAVE ENERGY

### Task List

Search By:

Application Id Company Name Application Name Lead LDC Application Status Milestone

Task Created From Task Created To Application Track

mm/dd/yyyy 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	

- You must click on "Approve" to enact the change. If you select "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