RETROFIT PROGRAM

PRE-PROJECT SUBMISSION CHECKLIST

STEP 1
REVIEW ELIGIBILITY CRITERIA

- [ ] **Review the Retrofit program key documents to ensure that your project is eligible for an incentive.**

- [ ] **Key documents include:**
  - Participant agreement
  - Program requirements
  - Measure-specific requirements in the Retrofit portal
  - Measurement and verification (M&V) guidelines (for custom applications only)
  - Custom worksheets (for custom applications only)

    Worksheets are optional for prescriptive applications and can be referenced for convenience

- [ ] **The Applicant must accept the participant agreement and submit your application before entering into a binding commitment or the application will be ineligible.**

STEP 2
COMPLETE YOUR APPLICANT OR APPLICANT REPRESENTATIVE RETROFIT PORTAL ACCOUNT

- [ ] **If you need help creating your Retrofit portal account, watch the "Registering for the Retrofit program" video or contact Retrofit Support Services at 1-844-303-5542.**

- [ ] **Only Applicants can accept and submit the participant agreement.**
  Therefore, applicants need to create an account.

STEP 3

BEGIN YOUR RETROFIT PROGRAM APPLICATION

- ☐ **Log in to your Retrofit portal account and begin your application. If you require help with the application process, watch the "Save on Energy How-to" videos.**
- ☐ **Assign an applicant representative, if applicable. Save on Energy representatives can also act as your applicant representative and help with your application, if desired.**

INSTRUCTIONS FOR THE APPLICANT REPRESENTATIVE

If you are an applicant representative, please ensure the applicant completes the following steps after you have created and submitted the application to the applicant:

1. Applicant logs in to Retrofit portal account.
2. Applicant opens application under “Pending Actions” tab.
3. Applicant clicks “Proceed to Submission” at the bottom of the page, selects the check box to agree to the participant agreement and clicks “Submit”, and then “Okay” on the confirmation page.

STEP 4

PROVIDE SUPPORTING DOCUMENTATION FOR YOUR PROJECT

Follow the checklist below to upload the required documentation, where applicable, for each facility in your application. You may be asked for additional information.

Prescriptive Projects

- ☐ **Project cost* estimates, quotes, or proposals with model numbers.**
- ☐ **List of existing equipment.**
- ☐ **Manufacturer specification sheet(s) for each new measure.**
- ☐ **Existing equipment photos, as your project may be selected for random QA/QC or subject to verification. Where there is no existing equipment, photos of the space are recommended. See photo requirements. Also ensure the intended project meets the project eligibility requirements** in the program requirements.**

*See program requirements for eligible project costs and Retrofit portal for measure eligibility.

Custom Projects

- ☐ Project cost* estimates, quotes, or proposals with model numbers.
- ☐ List of existing equipment.
- ☐ Completed custom worksheet
- ☐ Manufacturer specification sheet(s) for each new measure.
- ☐ Existing equipment photos, as your project may be selected for random QA/QC or subject to verification. Where there is no existing equipment, photos of the space are recommended. See photo requirements. Also ensure the intended project meets the project eligibility requirements* in the program requirements.
- ☐ Supporting engineering calculation or worksheet for energy/peak demand savings – only required for projects with an estimated incentive amount >$10,000 to <=$80,000
- ☐ M&V Plan** – only required for projects with an estimated incentive amount >$80,000

*See program requirements for eligible project costs

**Refer to M&V guidelines

STEP 5

SUBMIT YOUR APPLICATION TO START THE APPLICATION REVIEW PROCESS

- ☐ Only applicants can accept the participant agreement and submit the application.
- ☐ You may start your project after application submission prior to pre-project approval, but if you do so, you assume the risk that you may receive a lower incentive or the application may not be approved.
- ☐ Respond to questions from technical reviewers, who will contact you if any clarifications or revisions are required.
- ☐ Submit advance incentive invoice after pre-project approval if applicable.