RETROFIT PROGRAM

POST-PROJECT SUBMISSION CHECKLIST

2021-2024 CDM FRAMEWORK | INTERIM FRAMEWORK (APR. 2019 - DEC. 2020)

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STEP 1

GATHER THE REQUIRED DOCUMENTATION DURING IMPLEMENTATION

Ensure you obtain the following required documents while implementing your project.

For applications submitted on or after January 4, 2021:

- ☐ **Itemized invoice**
  The invoice must include make, model number, and quantity of equipment purchased. Please use the pre-tax total for your application. See program requirements for eligible project costs.

- ☐ **QA/QC photographic evidence and proof of payment**
  Ensure you have photographic evidence and proof of payment for the installed project. Proof of payment can be in the form of signature or "Paid" stamp from the contractor, copy of processed cheque(s), online banking account screenshot, debit or credit card receipt, copy of credit card statement, or accounting system screenshot. Please see best practices for photos.

- ☐ **Proof of disposal and/or decommissioning**
  A Disposal Confirmation Form needs to be submitted for each application for consistency; be sure to keep other supporting documentation (e.g., disposal certificate, receipts, etc.) on file in case it is requested. A form must still be submitted for projects which don't include existing equipment.

- ☐ **Updated specification sheets and other documents**
  Provide any updated information if different from the pre-project submission, such as a change in the equipment.

- ☐ **Any additional items required as communicated at the pre-project approval**
  Submit additional items as specified by the technical reviewer.

Note the following alternative documentation needs for applications pre-approved under the 2020 Retrofit program:

- [ ] **Itemized invoice**
  The invoice must include make, model number, and quantity of equipment purchased. Please use the pre-tax total for your application. See program requirements for eligible project costs.

- [ ] **Proof of payment**
  Proof of payment can be in the form of signature or "Paid" stamp from the contractor, copy of processed cheque(s), online banking account screenshot, debit or credit card receipt, copy of credit card statement, or accounting system screenshot.

- [ ] **Proof of disposal and/or decommissioning**
  Disposal certificate, receipt, or other supporting documentation as applicable, i.e., documentation with itemized listing of all old equipment types, quantities, specifications, and disposal method.

- [ ] **Updated worksheets, supporting calculations, specification sheets**
  If measures, operating hours, or equipment have changed since the pre-project approval, new worksheets/calculations/specification sheets must be provided.

- [ ] **M&V and QA/QC photographic evidence**
  If applicable, include documentation based on project type. Please refer to your M&V plan and the best practices for photos.

- [ ] **Any additional items required as communicated at the pre-project approval**
  Submit additional items as specified by the technical reviewer.

STEP 2
COMPLETE YOUR APPROVED PROJECT INSTALLATION

- [ ] Complete project as per pre-project approval.

⚠ **Please let your technical reviewer know if there are any changes to your project scope before the post-project submission.**

STEP 3

BEGIN YOUR POST-PROJECT SUBMISSION IN THE PORTAL

- [ ] **Log on to your Retrofit Portal account and continue your application.**
If you require help with the application process, watch the Save on Energy How-to videos.

- [ ] **Enter in the required fields including:**
  • Actual project start date
  • Actual project completion date

- [ ] **Make any revisions to your application as necessary, such as:**
  • Project details (e.g., measure quantities, etc.)
  • Final project cost without HST; see applicable program requirements for eligible costs
  • Applicant address where incentive payment will be mailed to
  • HST number, if applicable

- [ ] **Upload the required documentation previously gathered for your project under Step 1.**

INSTRUCTIONS FOR THE APPLICANT REPRESENTATIVE

If you are an applicant representative, please make sure your applicant logs into his or her account, accepts the participant agreement and accepts the post-project submission. See Resources and Support links.

STEP 4

SUBMIT YOUR APPLICATION TO CONTINUE THE APPLICATION REVIEW PROCESS

⚠ Only applicants can accept the participant agreement and submit the application.

- [ ] **Respond to questions from technical reviewers, who will contact you if any clarifications or revisions are required.**

STEP 5

SUBMIT THE INVOICE FOR YOUR APPROVED INCENTIVE AFTER POST-PROJECT APPROVAL

☐ **Upload the incentive invoice in the portal under your application.**
See incentive invoice guide.

⚠ **The application number will be referenced on your cheque. Make sure your finance department is aware of the application number and payment amount.**