

RETROFIT PROGRAM

PRE-PROJECT APPLICATION CHECKLIST

Step 1: Review eligibility criteria

- Review the Save on Energy key documents to ensure that your project is eligible for a Save on Energy Retrofit program incentive.
- Key documents include:
 - Participant agreement
 - Program requirements
 - Measure-specific worksheets (optional)
- You must accept the participant agreement and submit your application before entering into a binding commitment or the application will be ineligible.

Step 2: Create 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. Applicants therefore 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.

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 "Submit" at the bottom of the page, selects the check box to agree to the participant agreement and clicks "Submit" again, and then clicks "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.

- Project cost** estimates, quotes, or proposals with model numbers
- List of existing equipment
- Manufacturer specification sheet(s) for each new measure
- Base case and retrofit case photos, as your project may be selected for random QA/QC or subject to verification. [See photo requirements.](#)

***See program requirements for eligible project costs.*

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 eligible.
- 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.

Need help? Give us a call!

Contact the Retrofit Support line for assistance at 1-844-303-5542, or email retrofit@ieso.ca.