

RETROFIT PROGRAM

PRE-PROJECT SUBMISSION CHECKLIST 2021-2024 CDM FRAMEWORK



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*Optional worksheets can be referenced for convenience*
- You 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. 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.

NEED HELP? CONTACT US!

Call 1 844 303 5542 | Email Retrofit@ieso.ca | Visit SaveOnEnergy.ca/Retrofit



- 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 “Submit” at the bottom of the page, selects the check box to agree to the participant agreement and clicks “Submit” again, 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.

- 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.



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.