



RETROFIT PROGRAM

DIGITAL USER GUIDE:
FOR APPLICANTS AND APPLICANT REPRESENTATIVES

January 2020

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Getting Started

Retrofit Program Roles

There are several roles involved in creating and reviewing a Retrofit project application and post-project submission.

Role	Description
Applicant	<p>The Applicant is the Retrofit project owner. They create the application and post-project submission or assign an Applicant Representative to create them on their behalf.</p> <p>Only the Applicant can submit applications or post-project submissions.</p>
Applicant Representative	<p>An Applicant Representative is an <i>optional</i> surrogate that creates the application and post-project submission on the Applicant's behalf.</p> <p>An Applicant Representative cannot submit applications or post-project submissions.</p>
Save on Energy Analyst	<p>The Save on Energy Analyst manages Retrofit projects for the IESO.</p> <p>They review and provide final approval on all applications and post-project submissions.</p>

Registering for the Retrofit Program

As a new **Applicant** or **Applicant Representative** you need to complete two registrations.

Step 1: Registering for the Okta Portal

To register for the Retrofit program, you must first register for the **Okta portal**. This portal provides access to several IESO platforms, including the Retrofit program.

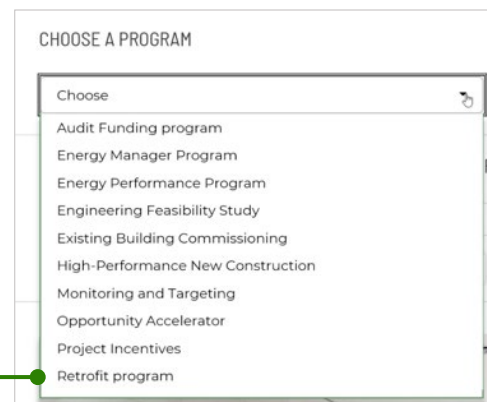
01 Open www.saveonenergy.ca.

02 Hover over **For Business and Industry**.

03 Click **Programs and Incentives**.



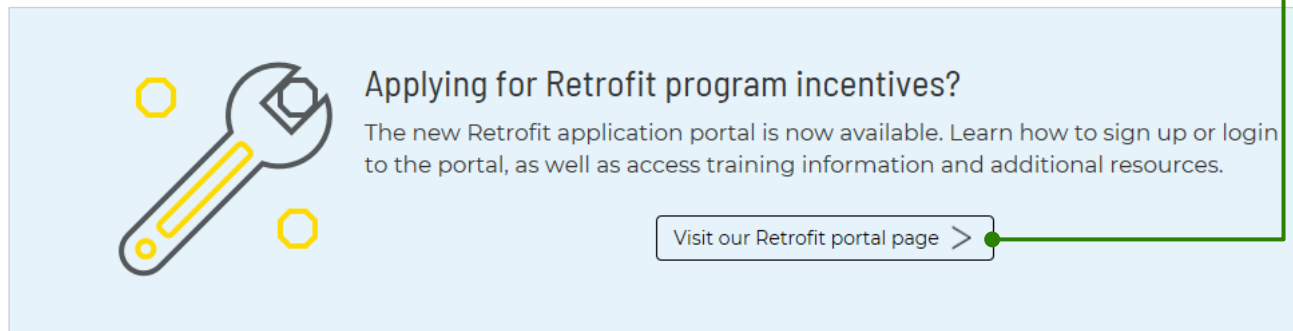
04 Select **Retrofit program**.



Registering for the Retrofit Program

Step 1: Registering for the Okta Portal

05 Click **Visit our Retrofit portal page.**



06 Enter your first name, last name and an email address.

07 Click **Sign me up.**

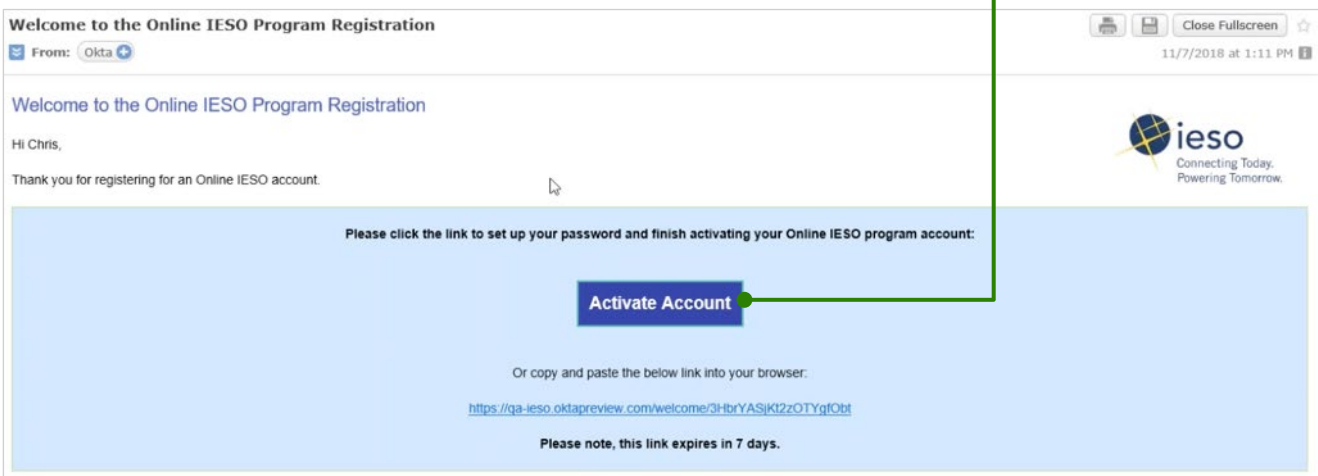
A screenshot of a "Retrofit Portal Sign Up" form. It contains three input fields: "First Name", "Last Name", and "Email". Below these fields are two buttons: "Sign me up" and "Forgot Password?". A green line originates from the text "Enter your first name, last name and an email address." in step 06 and branches to point to each of the three input fields. Another green line originates from the text "Click Sign me up." in step 07 and points to the "Sign me up" button. At the bottom of the form, there is a line of text: "If you have any questions about signing up, please contact Retrofit@ieso.ca."

When you click Sign me up, an activation email is sent to your email address.

Registering for the Retrofit Program

Step 1: Registering for the Okta Portal

08 Open the activation email and click **Activate Account**.



09 Enter a password.

10 Re-enter the **same** password.

A screenshot of a web form titled "Welcome to Independent Electricity System Operator (qa-ieso) - Preview, Chris!". Below the title, it says "Create your Independent Electricity System Operator (qa-ieso) - Preview account". The form has two input fields: "Enter new password" and "Repeat new password". Below the first field, there are password requirements: "at least 8 characters, a lowercase letter, an uppercase letter, a number, a symbol, no parts of your username". A green line with a dot points from the "Enter new password" field to the next step's instruction. Another green line with a dot points from the "Repeat new password" field to the previous step's instruction.

Registering for the Retrofit Program

Step 1: Registering for the Okta Portal

11 Select a security question. If you forget your password, this question will be used to verify your identity.

12 Enter the answer to the question.

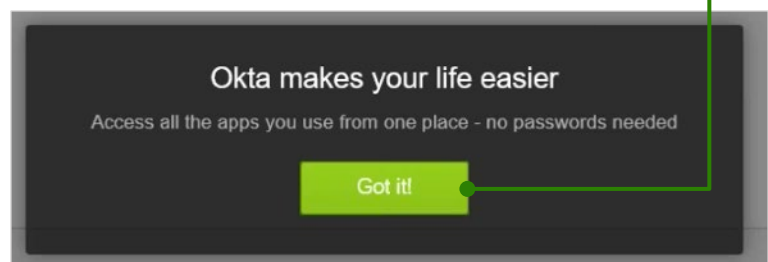


The screenshot shows a web form titled 'Choose a forgot password question'. It features a dropdown menu with the selected option 'What is the food you least liked as a child?'. Below this is an 'Answer' field containing the text 'Brussel Sprouts'. At the bottom right of the form is a button labeled 'Create My Account'. Green lines with dots at the end connect the instructional text to the dropdown menu, the answer field, and the 'Create My Account' button.

13 Click **Create My Account**.

This step brings you to the Okta portal.

14 Click **Got it!** to close the dialogue box.

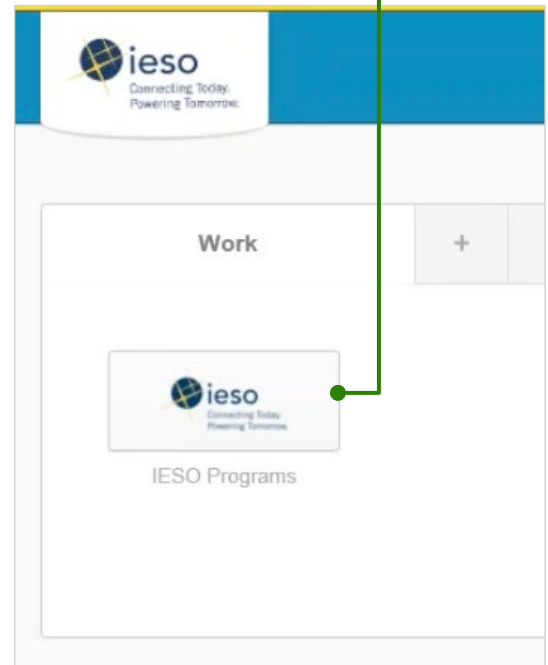


You can now register for the Retrofit program.

Registering for the Retrofit Program

Step 2: Registering for the Retrofit Program

01 Click the **IESO** logo.



02 Click **Register for Retrofit**.



Registering for the Retrofit Program

Step 2: Registering for the Retrofit Program

03 Complete the mandatory fields in the **Retrofit Registration** section.

The screenshot shows the 'Retrofit Registration' form. Annotations with green lines point to specific fields:

- Enter a contact number.** Points to the 'Phone Number *' field.
- Complete the address section.** Points to the 'Address 1 *', 'Address 2', and 'Address 3' fields.
- Select the account type.** Points to the 'Account Type *' section, which includes checkboxes for 'Applicant' and 'Applicant Rep'. Below this is a dropdown menu labeled 'Where did you hear about the Save on Energy Program? *' with the text '-- Select a value --'.
- Select where you heard about the Save on Energy Program.** Points to the 'Country *' dropdown menu, which also shows '-- Select a Country --'.

At the bottom left is a 'CANCEL' button and at the bottom right is a 'REGISTER' button.

04 Click **REGISTER**.

Registering for the Retrofit Program

Step 2: Registering for the Retrofit Program

05 Review your Retrofit registration information and verify that it is correct.

Register for Retrofit

First Name John	Last Name Doe	Address 1 * 123 Bond Street	City Toronto	Province Ontario	Postal Code M6E3H8
Email itzanami84@ujxspots.com	Phone Number 4165555555	Country Canada			

Account Type *

☒ Applicant

☒ Applicant Representative

Where did you hear about the Save on Energy Program?
Website

Registration complete

Launch Applicant Portal

06 Click **Launch Applicant Portal**.

This final step brings you to the Retrofit Portal **Home** page.

HOME
TASKS
APPLICATIONS
BEGIN NEW APPLICATION

Welcome Chris,

Based on your registered postal code your Local Distribution Company is **Alectra Utilities Corporation**

Keep in mind:

- Prior to commencing your project, your local hydro company or local program provider needs to pre-approve the application and your participant agreement.
- After completing your project, you must submit evidence of project completion to receive the financial incentive.

You can always log back in to check the status of your application(s), edit your account details or submit new applications for more funding.

My Information

My Profile

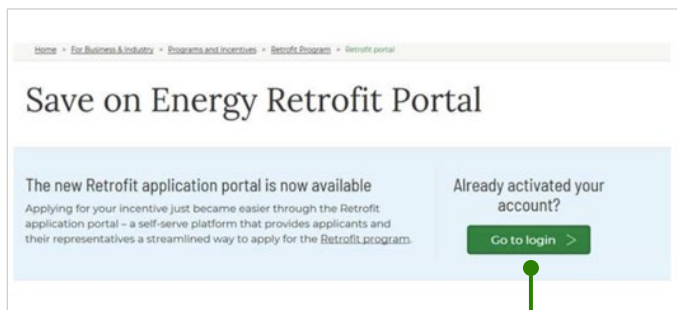
Program Information

Quick Start Guide
Save on Energy - Retrofit
Retrofit Eligibility Criteria
Program Rules

Logging into the Retrofit Portal

01 Open the Retrofit portal login page: www.retrofitportal.ca.

Note: This link will not work in Google Chrome. If you're using Google Chrome, use <http://www.retrofitportal.ca> to open the Retrofit portal login page.



02 Click **Go to login**.

03 Enter your username and password.

04 Click **Sign in**.

A screenshot of the Retrofit Portal sign-in form. At the top is the 'ieso' logo with the tagline 'Greening the Grid, powering the future'. Below the logo is a placeholder for a user profile picture. Underneath the picture is the text 'Sign In'. The form contains two input fields: 'Username' and 'Password'. The 'Username' field has a dropdown arrow on the right. Below the password field is a checkbox labeled 'Remember me'. At the bottom of the form is a blue button labeled 'Sign In'. Green lines with dots at the end point from step 03 to the 'Username' and 'Password' fields, and from step 04 to the 'Sign In' button.

Logging into the Retrofit Portal

Note: You can reset your password if you forget it.

Click **Need help?**
Click **Forgot password?**

Sign In

USERNAME

PASSWORD

☐ Remember me

Sign In

Need help?

Forgot password?

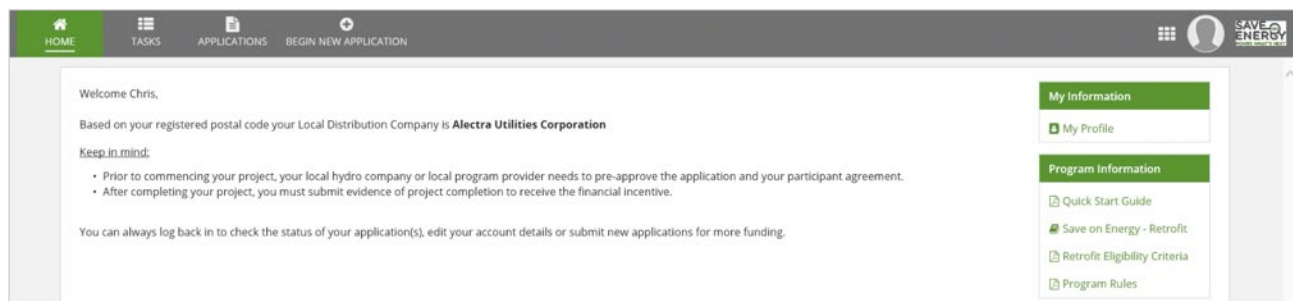
New User? Learn more about the Retrofit portal and how to sign up

Help

05 Click **Submit a Retrofit Application**.



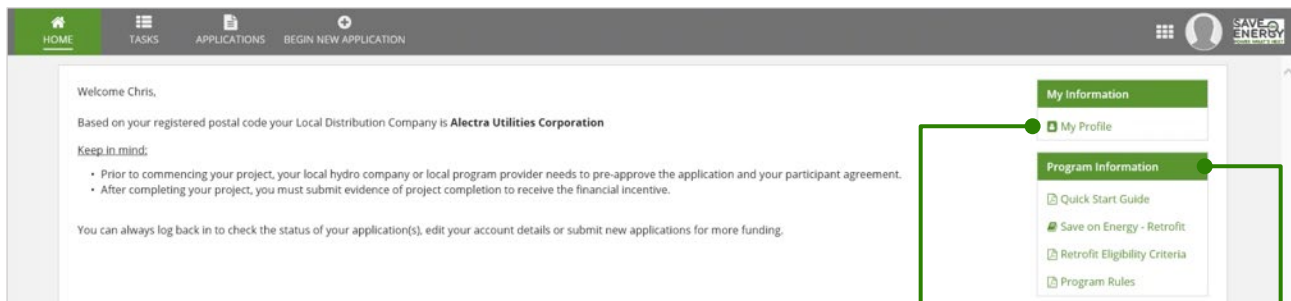
This final step opens the Retrofit Portal **Home** page.



Retrofit Portal Overview

Home

When you log in, you arrive at the Retrofit portal **Home** page. From here you can navigate to different portal sections using the tabs at the top of the page.



Click **My Profile** to view or edit your profile.

A variety of Retrofit program information is available.

Retrofit Portal Overview

Pending Actions

The **Pending Actions** page is where you find assigned tasks for your current Retrofit project(s).

You can search for tasks by application ID, company name, Lead LDC, application status milestone or creation date and then click **RESET** to update the task list.

Task List

Search By:

Application Id: Company Name: Application Name: Lead LDC: Application Status Milestone:

Task Created From: Task Created To:

Name	Company Name	Application Name	Application Id	Task Created	Lead LDC	Application Status Milestone
Edit Pre-Project Application 2000132	Acme Electric		2000132	3/11/2019 3:21 PM EST		Pre-project application

Click a task name to begin the task.

Click any header to sort your tasks by that criteria.

Click an application ID to open the application.

Retrofit Portal Overview

Applications

The **Applications** page includes a record of all your current and historical applications.

Enter any application information (e.g., application ID or name) and click **SEARCH** to find an application.

You can filter your application list using the drop-down menus.

The screenshot shows the 'APPLICATIONS' tab selected in the top navigation bar. Below the navigation bar is a search and filter section. A search bar with a magnifying glass icon and a 'SEARCH' button is on the left. To its right are several filter dropdown menus: 'STARTED ON', 'EST. PROJECT START DATE', 'EST. PROJECT COMPLETION DATE', 'INCENTIVE', 'STATUS', 'APPLICATION STATUS MILESTONE', and 'HEAD OFFICE'. Below these filters is a table of applications. The table has columns for Application ID, Company Name, Application Name, Started On, Applicant Rep, Est. Project Start Date, Est. Project Completion Date, Incentive, Status, Application Status Milestone, and Head Office. A single application is listed with ID 2000229, Company Name 'Retest crr 540 swetha', and Status 'Pre-Project Application Saved As Draft'.

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
2000229	Retest crr 540 swetha		Mar 27, 2019				\$0.00	Pre-Project Application Saved As Draft	Pre-project application	

Click an application ID to open the application.

Click any header to sort your applications by that criteria.

The status of each application is displayed.



Project Applications

Creating an Application

The **Applicant** or **Applicant Representative** creates the application.

Beginning the Application (as an Applicant)

01 Click **BEGIN NEW APPLICATION**.

If you want to assign the application to an Applicant Representative to complete, continue to **p. 21**.

Begin a Retrofit Application

RETROFIT PROGRAM APPLICATION REQUIREMENTS

- Important:** Prior to commencing your projects, ensure that the LDC associated with the application has provided approval on the CDM IS application.
- Both the Applicant and Applicant Representative must have registered for a User Account before they can use this Application. [Click Here](#) if a registration is required.
- The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.
- Applicants are required to review the Terms and Conditions and the Participant Agreement and signify acceptance using the options available at the end of this Application. Alternatively, contact your LDC to obtain a copy of the Terms and Conditions and the Participant Agreement.
- Please ensure that all worksheets and supporting documentation for your Project(s) are uploaded to the CDM IS Application. Incomplete Applications will not be processed and will not be pre-approved by your local electric utility.
- For Head Office Applications, where you have Projects that involve more than one LDC, please ensure you have support from a Lead LDC before you begin your RETROFIT Application. If you do not, please contact national.accounts@ieso.ca. We will help you find a Lead local electric utility and support this project throughout the application process.

For more information on Retrofit project eligibility, please [Click Here](#)

Complete the Application Myself

Select an App Rep to Continue the Application

NOTE: After Completing your Project(s) you must submit evidence of Project completion in order to receive your Participant Incentive

02 Click **Complete the Application Myself**.

This step creates a new application to be completed and brings you to the application main page.

Creating an Application

Beginning the Application (as an Applicant)

You can access any section of the application from the main page.

The project phase is displayed in the progress bar.

This section is where you add and manage project facilities.

This section summarizes Applicant information.

The screenshot shows the application interface with a header image of a lightbulb on coins. Below the image is a progress bar with five stages: Pre-Project Application, Pre-Project Review, Post-Project Submission, Post-Project Review, and Project Closed. The 'Pre-Project Application' stage is active. On the right, there is a 'Head Office App' status with a red 'X' icon. The main content area has a sidebar with expandable sections: Manage Facilities, Applicant Details, Applicant Representative Details, Basic Details, and Estimated Calculation Results. The 'Manage Facilities' section is expanded, showing a table with a 'Comment' column and a 'DELETE' button. At the bottom right, there are 'SAVE TO DRAFT' and 'SUBMIT TO LDC' buttons.

This section summarizes energy, incentive and demand information for the project.

This section is where you provide basic project information.

This section summarizes Applicant Representative information.

Continue to **Reviewing Applicant Details** on p. 25.

Creating an Application

Beginning the Application (as an Applicant)

Assigning an Application to an Applicant Representative

The **Applicant** can assign an **Applicant Representative** to complete an application on their behalf.

01 Click **BEGIN NEW APPLICATION**.

Begin a Retrofit Application

RETROFIT PROGRAM APPLICATION REQUIREMENTS

- Important:** Prior to commencing your projects, ensure that the LDC associated with the application has provided approval on the CDM IS application.
- Both the Applicant and Applicant Representative must have registered for a User Account before they can use this Application. [Click Here](#) if a registration is required.
- The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.
- Applicants are required to review the Terms and Conditions and the Participant Agreement and signify acceptance using the options available at the end of this Application. Alternatively, contact your LDC to obtain a copy of the Terms and Conditions and the Participant Agreement.
- Please ensure that all worksheets and supporting documentation for your Project(s) are uploaded to the CDM IS Application. Incomplete Applications will not be processed and will not be pre-approved by your local electric utility.
- For Head Office Applications, where you have Projects that involve more than one LDC, please ensure you have support from a Lead LDC before you begin your RETROFIT Application. If you do not, please contact national.accounts@ieso.ca. We will help you find a Lead local electric utility and support this project throughout the application process.

For more information on Retrofit project eligibility, please [Click Here](#)

NOTE: After Completing your Project(s) you must submit evidence of Project completion in order to receive your Participant Incentive

Complete the Application Myself

Select an App Rep to Continue the Application

02 Click **Select an App Rep to Continue the Application**.

Creating an Application

Beginning the Application (as an Applicant)

Assigning an Application to an Applicant Representative

03 Enter the Applicant Representative's email address.

The screenshot shows a web form titled "Begin a Retrofit Application". It contains two links: "> About the RETROFIT PROGRAM Application Process" and "> Starting the RETROFIT PROGRAM Application Process". Below these is the section "Select an Applicant Representative (Optional)". Under this section, there is a label "App Rep's Email Address" and a text input field containing "mohammed.dildhar@ieso.ca". To the right of the input field are labels "First Name: Mohammed" and "Last Name: Dildhar". Below the input field is a "SEARCH" button. At the bottom right of the form are two buttons: "COMPLETE THE APPLICATION MYSELF" and "SEND TO APP REP". Green lines with dots at the end point from the text instructions to the corresponding elements: from "03" to the email input field, from "04" to the "SEARCH" button, and from "05" to the "SEND TO APP REP" button.

04 Click **SEARCH**.

You can begin work on the application before assigning it to the Applicant Representative.

05 Click **SEND TO APP REP**.

The Applicant Representative will now receive an email notification to edit the application.

When the application is complete, you will need to review it before submitting it to the Save on Energy Analyst. See **Submitting the Application** on p. 43.

Creating an Application

Beginning the Application (as an Applicant Representative)

01 Click **BEGIN NEW APPLICATION**.



02 Enter the Applicant's email address.

A screenshot of the 'Select an Applicant' form. The form has a light grey background. At the top, it says 'The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.' Below this is the heading 'Select an Applicant'. There is a label 'Applicant's Email Address *' and a text input field containing 'yuhe.yuan@ieso.ca'. A green line connects the instruction 'Enter the Applicant's email address.' to the input field. To the right of the input field is a 'SEARCH' button. Further right, there are labels 'First Name' with the value 'Yuhe' and 'Last Name' with the value 'Yuan'. At the bottom right of the form is a green button labeled 'COMPLETE THE APPLICATION MYSELF'. A green line connects the instruction 'Click COMPLETE THE APPLICATION MYSELF.' to this button.

03 Click **SEARCH**.

The Applicant's name will appear if they are registered for the Retrofit program.

04 Click **COMPLETE THE APPLICATION MYSELF**.

This step creates a new application to be completed and brings you to the application main page.

Creating an Application

Beginning the Application (as an Applicant Representative)

You can access any section of the application from the main page.

The project phase is displayed in the progress bar.

This section is where you add and manage project facilities.

This section summarizes Applicant information.

The screenshot shows a web application interface. At the top is a header image featuring a lightbulb, a small plant, and coins. Below the header is a progress bar with five stages: Pre-Project Application, Pre-Project Review, Post-Project Submission, Post-Project Review, and Project Closed. The first stage, Pre-Project Application, is active. On the right side of the header image, there is a button labeled 'Head Office App' with a red 'X' icon. Below the progress bar is a sidebar menu with the following items: Manage Facilities, Applicant Details, Applicant Representative Details, Basic Details, Estimated Calculation Results, and Comment. The main content area contains a large text input field. At the bottom left of the input field is a 'DELETE' button. At the bottom right are two buttons: 'SAVE TO DRAFT' and 'SEND TO APPLICANT'. Green lines connect the callout text boxes to specific elements in the interface: one to the sidebar menu, one to the progress bar, one to the 'Manage Facilities' section, one to the 'Applicant Representative Details' section, one to the 'Basic Details' section, and one to the 'Applicant Details' section.

This section summarizes energy, incentive and demand information for the project.

This section is where you provide basic project information.

This section summarizes Applicant Representative information.

Continue to **Reviewing Applicant Details** on p. 25.

Creating an Application

Reviewing Applicant Details

The **Applicant Details** section is automatically populated based on the Applicant's Retrofit program profile.

Review the mandatory fields in this section and make any required updates.

▼ Applicant Details

Company *		Address 1 *	
<input type="text" value="City of St Catharines"/>		<input type="text" value="50 Church St Street"/>	
First Name	Swetha	Last Name	Yallala
Email	swetha.yallala@ieso.ca	Phone Number	1234567890
HST# 🇨🇦		Address 2/Unit #	
<input type="text" value="756822487RT0001"/>		<input type="text"/>	
		Province *	Address 3
		<input type="text" value="St. Catharines"/>	<input type="text"/>
		Postal Code *	
		<input type="text" value="L2R7C2"/>	

Note: If an Applicant Representative is assigned to the application, the **Applicant Representative Details** section is automatically populated. These details cannot be edited.

✓

Applicant Representative Details

First Name	Last Name
Michael	Tsao
Email	Phone Number
michael.tsao@ieso.ca	1234567890

Creating an Application

Adding Basic Project Details

Complete the mandatory fields in the **Basic Details** section on the application main page.

Enter a project name.

▼ Basic Details

Project Name *

Lighting Retrofit: Project - Internal Fixtures

Have you received any other financial incentives for this project by any other public program? *

☒ Y ☐ N

Funding Comments *

Funding Provider(s) ? *

Name of Program(s) ? *

Project Description *

Replace lighting with Retrofit: options

Estimated Project Start Date Mar 10, 2019

Estimated Project End Date Mar 10, 2019

Select whether you have received other financial incentives for the project.

If you are receiving other financial incentives, you must provide funding information.

Enter a project description.

Creating an Application

Adding Facilities

01 Click **ADD NEW FACILITY**.

▼ Manage Facilities

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status
No items available					

ADD NEW FACILITY

This brings you to the main page for the new facility.

You can access any facility section from the main page.

You can search for existing facilities in this section.

This section is where you provide basic facility information.

Application Name: Multi Site Demonstration Application Id: 102094 Lead LDC

The information required to complete this section of the RETROFIT Application process includes the following:

- Equipment cost estimates, quotes or proposals
- Cut sheets or detailed manufacturers' data
- For Prescriptive Measures, completed Prescriptive Worksheet(s)
- For Custom Measures, supporting calculations for the energy (kWh) and demand (kW) savings
- For Custom Measures with estimated incentives of \$10,000 or more, a proposed Project MBV Plan

- Find Existing Facility
- Basic Details
- Manage Prescriptive Measures
- Manage Custom Measures
- Upload Documents for Facility
- Estimated Calculation Results

This section summarizes energy, incentive and demand information for the facility.

This section is where you upload documents for the facility.

This section is where you add and manage custom measures for the facility.

This section is where you add and manage prescriptive measures for the facility.

Creating an Application

Adding Facilities

02 Complete the mandatory fields in the **Basic Details** section on the facility main page, if you're adding a new facility that has not been used in a previous application.

The screenshot shows the 'Basic Details' section of a facility application form. Green lines and dots connect specific fields to descriptive text boxes:

- Facility Name ***: Annotated with "Enter the facility name."
- Facility Type ***: Annotated with "Select the facility type."
- Ownership Type ***: Annotated with "Select the ownership type."
- Address 1 ***: Annotated with "Enter the facility address, including the city, province and postal code."
- Electric Utility Account ***: Annotated with "Enter the electric utility account."
- Estimated Project Start Date *** and **Estimated Project End Date ***: Annotated together with "Select an estimated project start and end date."
- Description ***: Annotated with "Enter a project description."

The form fields shown are:

- Facility Name ***: Acme Electric
- Facility Type ***: Commercial - Large Retail
- Ownership Type ***: Owner
- Address 1 ***: 123 Any Street
- Address 2/Unit #**: (empty)
- Address 3**: (empty)
- City ***: Toronto
- Province**: ON
- Postal Code ***: M6E3H8
- Local Distribution Company ***: --- Select an LDC ---
- Electric Utility Account ***: 123456789
- Estimated Project Start Date ***: 02/25/2019
- Estimated Project End Date ***: 03/01/2019
- Description ***: Lighting Replacement

Creating an Application

Adding Facilities

Note: If you want to reuse a facility from a previous application, you can add the existing facility with the basic details already populated.

Click **Find Existing Facility**.

Enter facility information, such as the city name, in any of the search fields.

▼ Find Existing Facility

Application Name

City

Facility Name

Address1

SEARCH

Click **SEARCH**.

Select the facility from the facilities list.

Facilities

Name	Application Name	Address 1	City
No items available			

03 Click **ADD NEW PRESCRIPTIVE MEASURE**, if you want to include prescriptive measures (this is not a requirement). If not, continue to **step 9**.

▼ Manage Prescriptive Measures

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status
No items available					

ADD NEW PRESCRIPTIVE MEASURE

This opens a new prescriptive measure to be completed.

Creating an Application

Adding Facilities

04 Complete the mandatory fields in the **Basic Details** section for the prescriptive measure.

Select the measure category.

Select the end use.

Select the conservation measure name.

Select the conservation measure description.

Enter the manufacturer name.

Enter the estimated quantity.

These values are automatically calculated when you select the conservation measure description.

These values are automatically calculated when you enter the estimated quantity.

Enter the model number.

Click **SAVE TO DRAFT** if you want to save a draft of the measure.

The details in this section apply only to Prescriptive Measures included in your Project. To complete this section, you will be required to:

- Provide equipment list details
- Select the Prescriptive Measures and enter the quantities which you are installing

Expired Measures selected within an Expired worksheet, require prior LDC course it before submission.

Basic Details

Measure Category
Lighting

End Use
Lighting - Large Non-Food Retail

Conservation Measure Name
T5 MEDIUM AND HIGH BAY FIXTURES

Conservation Measure Description
4-lamp HO T-5 fixtures (54W)

Incentive Per Unit \$50.00

Eligibility Criteria New Fixtures with standard T5 ballast and lamps or high output ballast and lamps.

The incentive for T 5 Medium and High Bay fixtures applies only to the replacement of High Intensity Discharge luminaires, T-12 High Output and Very High Output lamps and ballasts with T-5 lamps using electronic ballasts. Replacements of T-12 lamps to T-5 lamps without installation of electronic ballast(s) are not eligible. It is the Applicant's responsibility to confirm that light levels of the energy efficient design meet the minimum regulatory requirements and the suggested maximum levels for the proposed use of the space. All ballasts must be dedicated to T5 technology.

Assumed Base Case 400 W Probe Start Metal Halide

Manufacturer GF

Estimated Quantity 100

Model Number 123456

ES DLC Code

kW Reduction 22.600 kW

kWh Savings 92.411,400 kWh

Estimated Incentive \$5,000.00

CANCEL **SAVE TO DRAFT** **APPLY**

05 Click **APPLY** to add the measure to the facility.

Creating an Application



Adding Facilities

The measure will now appear in the prescriptive measures summary on the facility main page.

Click here to edit the measure.

Click here to delete the measure.

~Manage Prescriptive Measures

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status	
Lighting	INTEGRAL LED FIXTURE RETROFIT KIT	2' x 4' LED troffer or 4' LED linear ambient fixture (>= 3000 Lumens)	1000	\$35,000.00	Complete	 

The measure status is **complete**.

Note: If you save a draft of the measure without submitting it, the status will appear as **incomplete**. The facility cannot be submitted until all measures are **complete**.

06 Repeat steps 3–5 until you have added all the prescriptive measures you want to add.

Creating an Application

Adding Facilities

07 Enter the **estimated facility cost** for all the prescriptive measures.

> Basic Details
▼ Manage Prescriptive Measures

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status		
Lighting	T5 MEDIUM AND HIGH BAY FIXTURES	4-lamp HO T-5 fixtures (54W)	100	\$5,000.00	Complete	→	✖

Estimated Facility Cost Prescriptive *

Prescriptive measure costs are limited to the equipment purchased and installed, labour for the installation of the equipment by suppliers and costs to dispose of or decommission the replaced equipment.

ADD NEW PRESCRIPTIVE MEASURE

RECALCULATE

You must click recalculate before continuing

The **RECALCULATE** button appears when this field is completed.

08 Click **RECALCULATE**.

09 Click **ADD NEW CUSTOM MEASURE**, if you want to include custom measures (this is not a requirement). If not, continue to **step 14**.

▼ Manage Custom Measures

Custom Measure Category	Custom Measure Name	Estimated Calculated Incentive Amount	Estimated kWh Savings	Estimated kW Reduction	Status		
No items available							

ADD NEW CUSTOM MEASURE

This opens a new custom measure to be completed.

Creating an Application

Adding Facilities

Edit Pre-Project Custom Measure for Application 2000043

Please enter details in following fields and click submit to create a custom measure.

The details in this section apply only to Custom Measures included in your Project. To complete this section, you will be required to:

- Provide Base Case & Energy Efficient Case descriptions
- Upload supporting documentation
- Provide eligible Project cost details
- Describe and provide information for each Custom Measure you are installing

For custom measures with an estimated incentive amount greater than \$10,000, a Project Measurement and Verification (M&V) Plan is required. Please refer to the Project M&V Procedures for the Project M&V requirements.

Basic Details

Other Details

CANCEL

SAVE TO DRAFT

APPLY

10 Complete the mandatory fields in the **Basic Details** section for the custom measure.

The screenshot shows the 'Basic Details' section of a form with the following fields and annotations:

- Custom Measure Name ***: Annotated with 'Enter the measure name.' The input field contains 'Exterior Lighting'.
- Category ***: Annotated with 'Select the measure category.' The dropdown menu is set to 'Lighting'.
- Base Case Description ***: Annotated with 'Enter the base case description.' The input field contains 'HID Street Lights'.
- Manufacturer ***: Annotated with 'Enter the manufacturer.' The input field contains 'XYZ'.
- Model Number ***: Annotated with 'Enter the model number.' The input field contains '123'.
- Energy Efficient Case Description ***: Annotated with 'Enter the energy efficient case description.' The input field contains 'LED StreetLights'.

Creating an Application

Adding Facilities

11 Complete the mandatory fields in the **Other Details** section for the custom measure.

The screenshot shows the 'Other Details' section of a form. It contains several input fields for consumption, demand, savings, and costs. Annotations with green lines point to specific fields and buttons, explaining their purpose.

Field Label	Value
Estimated Base Case Consumption (kWh) *	10000000
Estimated Base Case Demand (kW)	10
Estimated Energy Efficient Case Consumption (kWh) *	999999
Estimated Energy Efficient Case Demand (kW)	10
Estimated Consumption Savings	99,000,001.000 kWh
Estimated Demand Reduction	0.000 kW
Estimated Custom Measure Installation Cost *	7000000
Estimated Calculated Incentive Amount	\$4,950,000.05
Estimated Equipment Cost	500000

Annotations:

- Enter the estimated base case consumption.
- Enter the estimated energy efficient case consumption.
- Enter the estimated base case demand.
- Enter the estimated energy efficient case demand.
- Enter the estimated custom measure installation cost.
- Enter the estimated equipment cost.
- The estimated consumption savings is automatically calculated based on the consumption estimates.
- The estimated demand reduction and incentive amount are automatically calculated based on the demand estimate.
- Click **SAVE TO DRAFT** if you want to save a draft of the measure.

Buttons: CANCEL, SAVE TO DRAFT, APPLY

12 Click **APPLY** to add the measure to the facility.

Creating an Application

Adding Facilities

The measure will now appear in the custom measures summary on the facility main page.

Click here to edit the measure.

▼ Manage Custom Measures

Custom Measure Category	Custom Measure Name	Estimated Calculated Incentive Amount	Estimated kWh Savings	Estimated kW Reduction	Status	
Lighting	Exterior Lighting	\$0.05	1	0	Complete	→ ✕

ADD NEW CUSTOM MEASURE

The measure status is **complete**.

Click here to delete the measure.

Note: If you save a draft of the measure without submitting it, the status will appear as **incomplete**. The facility cannot be submitted until all measures are **complete**.


13 Repeat steps 9–12 until you have added all the custom measures you want to add.

Once all measures have been added, upload any required documents for the facility, such as specification sheets or vendor quotations.

14 Click **UPLOAD**.

▼ Upload Documents for Facility

Upload Files

 Drop files here

You can also drag a file to the **Drop files here** field.

Creating an Application

Adding Facilities

15 Double-click the document you want to attach.

The document will now appear in the facility document summary.

The screenshot shows a web interface for uploading documents. It features a section titled 'Upload Documents for Facility' with a sub-header 'Upload Files'. Below this, there is a list of uploaded files, including 'Test Document' (DOCX - 12.33 KB). To the right of the file list, there are fields for 'Creation User' (Yuhe Yuan) and 'Creation Date' (11/7/2018 1:54 PM EST). A 'Drop files here' button is also visible. Three green lines with circular endpoints point to specific elements: one to the 'Test Document' file icon, one to the 'Drop files here' button, and one to the 'Creation User' and 'Creation Date' fields.

Click here to delete the document.

Click here to add another document if required.

The creation user and creation date fields are automatically populated after you exit and re-enter this section.

Creating an Application

Adding Facilities

16 Review the **Estimated Calculation Results** section on the facility main page.

17 Click **APPLY** to add the facility to the application.

▼ **Estimated Calculation Results**

	Estimated Eligible Costs	Estimated Energy Savings (kWh)	Estimated Demand Reduction (kW)	Estimated Incentive
Prescriptive	\$42,000.00	190,413.600	44.200	\$35,000.00
Custom	\$1,200,000.00	4,000,001.000	500.000	\$200,000.05
Total	\$1,242,000.00	4,190,414.600	544.200	\$235,000.05

Note: Incentives will be capped based on the Retrofit Program Rules

Click **SAVE TO DRAFT** if you want to save a draft of the facility.

Note: You will be blocked from submitting a facility if it does not meet the minimum eligibility requirements.


Creating an Application

Adding Facilities

The facility will now appear in the facility summary on the application main page.

Click here to edit the facility.

▼ Manage Facilities

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
IESO Adelaide	120 Adelaide Street	Toronto	\$235,000.05	Example	Complete	

ADD NEW FACILITY

The facility status is **complete**.

Note: If you save a draft of the facility without submitting it, the status will appear as **incomplete**. The final application cannot be submitted until all facilities are **complete**.

18 Repeat steps 1–17 as required if your application includes more than one facility.

Creating an Application

Adding Facilities

Duplicating a Facility

If you need to add more than one facility to your application, you can save time by duplicating a facility, rather than creating each one from scratch.

01 Open an existing facility.

▼ Manage Facilities

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
IESO Adelaide	120 Adelaide Street	Toronto	\$235,000.05	Example	Complete	→

ADD NEW FACILITY

02 Click **DUPLICATE FACILITY**.

▼ Estimated Calculation Results

	Estimated Eligible Costs	Estimated Energy Savings (kWh)	Estimated Demand Reduction (kW)	Estimated Incentive
Prescriptive	\$42,000.00	190,413.500	44.200	\$35,000.00
Custom	\$1,200,000.00	4,000,001.000	500.000	\$200,000.05
Total	\$1,242,000.00	4,190,414.500	544.200	\$235,000.05

Note: Incentives will be capped based on the Retrofit Program Rules

CANCEL

DELETE

DUPLICATE FACILITY

SAVE TO DRAFT

APPLY

Creating an Application

Adding Facilities

Duplicating a Facility

03 Click **YES**.

Duplicating this facility will save all current changes, create a new facility identical to the current facility, and then return you to the current facility. Proceed?

This creates a new facility that is identical to the existing facility.

04 Click **CANCEL** to exit the existing facility.

05 Refresh the page after approximately thirty seconds.

The duplicated facility will now appear in the application facility list.

▼ Manage Facilities

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status
IESO Adelaide	120 Adelaide	Toronto	\$350.00	Large Office Building	Complete →
IESO Adelaide	120 Adelaide	Toronto	\$350.00	Large Office Building	Incomplete →

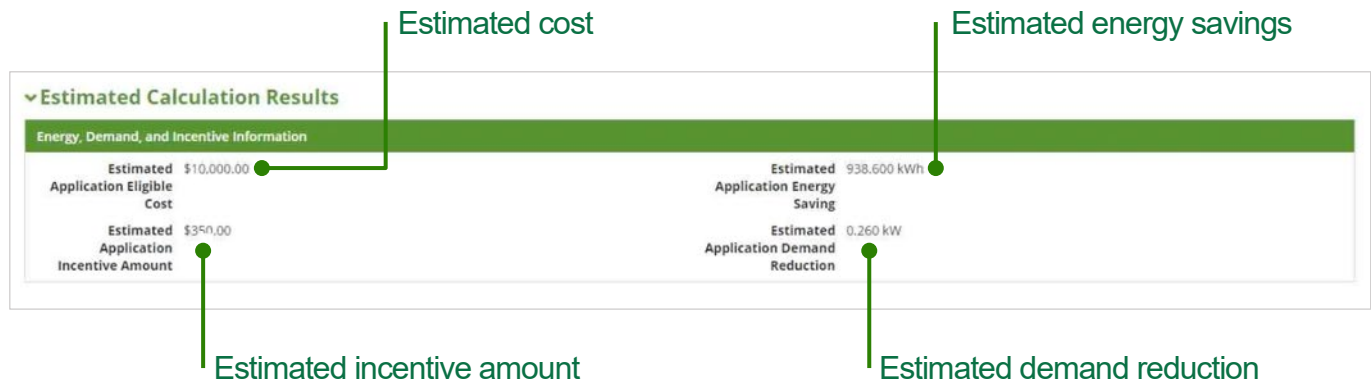
Note: If you do not refresh the page, the duplicated facility will not appear in the application facility list.

Note: The duplicated facility's status will be incomplete. You must complete the facility in order to submit the application.

Creating an Application

Reviewing Estimated Calculation Results

Review the **Estimated Calculation Results** section for your application once you have added all your facilities.



The application is now ready to be submitted.

If you're an **Applicant**, continue to **Submitting the Application** on p. 43.

If you're an **Applicant Representative** you must forward the application to the Applicant. Continue to **Forwarding the Application to the Applicant** on p. 42.

Creating an Application

Forwarding the Application to the Applicant

01 Enter a comment.

> History and Comments

Comment

Looks Good

DELETE SAVE SUBMIT TO APPLICANT

02 Click **SUBMIT TO APPLICANT**.

The Applicant will now receive an email notification to edit the application.

Creating an Application

Submitting the Application

Only the **Applicant** can submit the application to the Save on Energy Analyst.

If you created the application, continue to **step 6**.

If an **Applicant Representative** created the application, you will receive an email notification to edit the application. Locate the application ID in the notification email and continue to **step 1**.

01 Click **PENDING ACTIONS**.

PENDING ACTIONS APPLICATIONS BATCH APPLICATION ROUT... BULK UPDATE APPLICANT/... PAPER COPY APPLICATION

Task List

Search By:

Application Id Company Name Application Name Lead LDC Application Status Milestone

Task Created From Task Created To

RESET

Name	Company Name	Application Name	Application Id	Task Created	Lead LDC	Application Status Milestone
Edit Pre-Project Application "Project ID: Project Name".	Welland Forge	Kjh	2000127	3/8/2019 6:44 PM EST	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED	Pre-project review
Route Facility Review for Pre-Project Application 2000126: Swetha Ret_1395, 1315 Morningside Avenue	Welland Forge	Swetha Ret_1395	2000126	3/8/2019 3:24 PM EST	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED	Pre-project review

02 Enter the application ID.

03 Click **RESET**.

04 Click **Edit Pre-Project Application "Project ID: Project Name"**.

Creating an Application

Submitting the Application

05 Review all components of the application and make any edits as required.

06 Enter a comment.

07 Click **SUBMIT**.

Comment

Please review.

DELETE SAVE TO DRAFT SEND TO APP REP SUBMIT

If the application was completed by an Applicant Representative, you can click **SEND TO APP REP** to return the application to them, if required.

08 Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agree to the participant agreement.

Application Approval

You have now reached the final stage before your RETROFIT Application can be submitted to your local electric utility for review and pre-approval. If you commence your Project prior to receiving pre-approval, you will not be eligible to receive a Participant Incentive.

<p>PRIOR TO Commencing your Project(s)</p> <p>Ensure that the LDC has pre-approved this Application and your Participant Agreement</p>	<p>AFTER Completing your Project(s)</p> <p>You must submit evidence of Project completion in order to receive your Participant Incentive</p>
---	---

I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. *

☐ Yes

I have read and agree to the Participant Agreement. *

☐ Yes

BACK TO APPLICATION SUBMIT

09 Click **SUBMIT**.

Creating an Application

Submitting the Application

The Save on Energy Analyst will now receive an email notification to review the application, and you will receive a notification that your application has been submitted.

Successful Submission for Application: 2000043

Thank you for your interest in the Save on Energy Retrofit Program. TORONTO HYDRO-ELECTRIC SYSTEM LIMITED has received your application.

APPLICATION INFORMATION

Submission Date: 2/19/2019 7:16 AM EST

Application Name: Acme Retrofit Lighting

Application ID: 2000043

Project Location(s): Acme Electric 123 Any Street

Total Estimated Application Incentive: 7250

Applicant Representative Name:

Applicant Representative Email Address:

Applicant Representative Phone Number:

WHAT'S NEXT?

Your project will be reviewed for eligibility. You may receive a request for a site visit or additional information by your Electric Utility. You will receive confirmation of approval, a request for edits or otherwise shortly.

OKAY

Next Steps

As an applicant, after you submit your application, when you begin your project is up to you. You can begin work once your application is submitted, or you may wait until your application receives pre-approval to ensure it meets program requirements. If you choose to start your project before your application is pre-approved, it is important to know there is a risk that your project may receive a lower than expected incentive amount, or that your project application may not be approved. It is also recommended that you are familiar with what may be required for quality assurance and quality control (QA/QC) before you begin – check the [QA/QC Guidelines](#) and [Photo Best Practices](#) to make sure you have what you might need.

When you first submit your application it is routed to a Save on Energy Analyst for approval. The Save on Energy Analyst may recommend edits and return it to you, the Applicant, to update. If edits are required, it will be reviewed again by the Save on Energy Analyst once the edits are made.



Once the Save on Energy Analyst has pre-approved the application, the project can begin if it hasn't already been started.

Upon completion of the project, the Applicant will:

- Enter post-project submission information
- Submit results through the reported results process

Recalling an Application

The **Applicant** can recall an application that has been submitted for approval, as long as the Save on Energy Analyst has not started their review.

01 Click **APPLICATIONS**.

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
2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019		Feb 25, 2019	Mar 1, 2019	\$7,250.00	Pre-Project Application Approved	Pre-project review	N

02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

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
2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019		Feb 25, 2019	Mar 1, 2019	\$7,250.00	Pre-Project Application Approved	Pre-project review	N

05 Click **Related Actions**.

06 Click **Recall Application**.

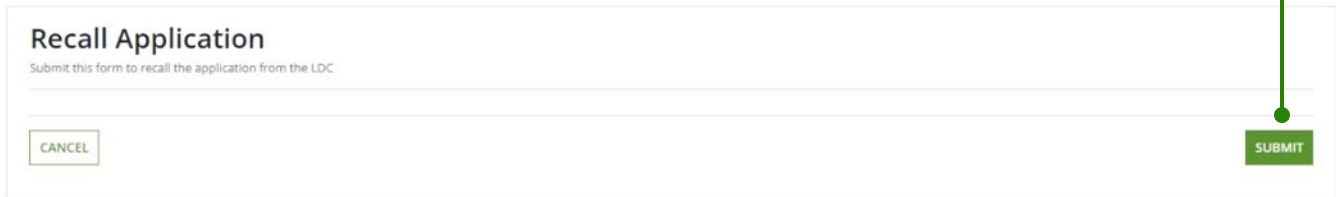
Retrofit Application: Acme RetrofitLighting

[Summary](#)
[Related Actions](#)

Recall Application
Related action process to recall the application

Recalling an Application

07 Click **SUBMIT**.



The screenshot shows a web form titled "Recall Application" with the instruction "Submit this form to recall the application from the LDC." Below the instruction is a horizontal line. At the bottom left of the form is a "CANCEL" button, and at the bottom right is a green "SUBMIT" button. A green line from the instruction "Click SUBMIT." points to the "SUBMIT" button.

Note: If the Save on Energy Analyst has started reviewing the application, you will receive an error message stating that you cannot recall the application. If edits are required, contact the Save on Energy Analyst to open the application for edits.

08 Click **YES**.



The screenshot shows a confirmation dialog box with the text "Submitting this related action will recall the application from the LDC. Continue?". Below the text is a horizontal line. At the bottom left is a "NO" button, and at the bottom right is a green "YES" button. A mouse cursor is pointing at the "YES" button. A green line from the instruction "Click YES." points to the "YES" button.

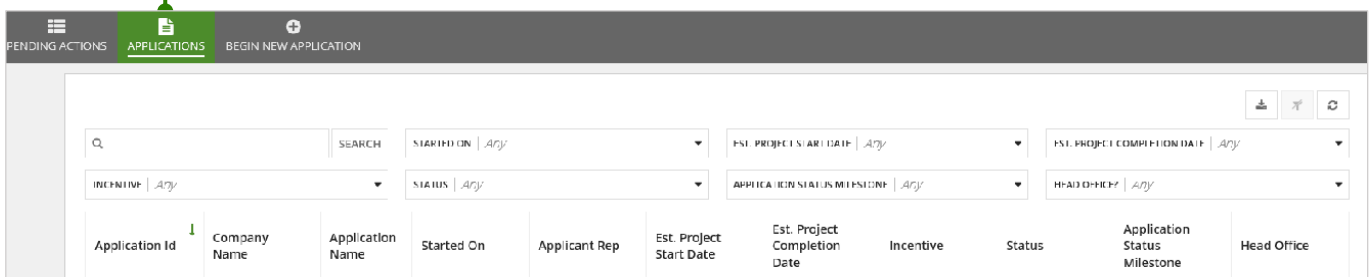
The Applicant will now receive an email notification to edit the application.

Cancelling an Application

The **Applicant** can cancel an application before it has been submitted to the Save on Energy Analyst for approval.

Note: When you delete the application it cannot be recovered, even by technical support.

01 Click **APPLICATIONS**.



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
20000043		Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao		Nov 4, 2018 7:00 PM				

02 Enter the application ID.

03 Click **SEARCH**.

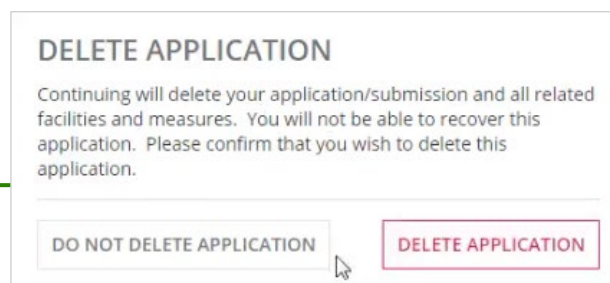
04 Click the application ID.

20000043	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
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05 Click **DELETE**.



06 Click **DELETE APPLICATION**.



DELETE APPLICATION

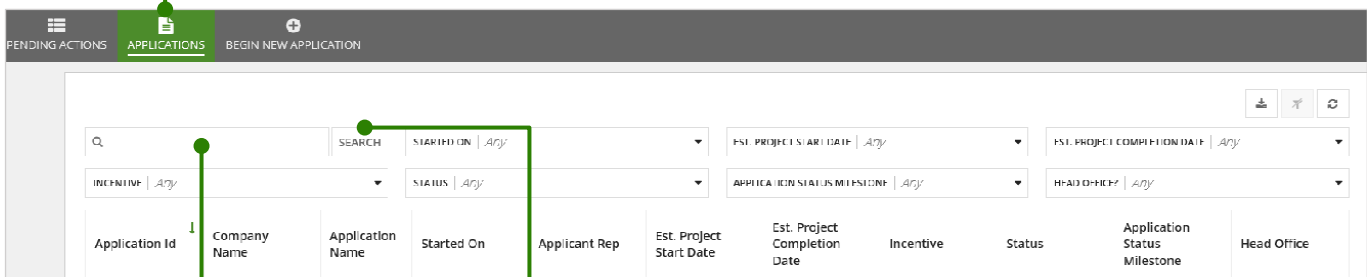
Continuing will delete your application/submission and all related facilities and measures. You will not be able to recover this application. Please confirm that you wish to delete this application.

DO NOT DELETE APPLICATION DELETE APPLICATION

Copying an Application

The **Applicant** or **Applicant Representative** can create a copy of a pre-existing application.

01 Click **APPLICATIONS**.



The screenshot shows the 'APPLICATIONS' tab selected in the top navigation bar. Below the navigation bar, there is a search and filter section with various dropdown menus and a 'SEARCH' button. A green line points from the 'APPLICATIONS' tab to the 'SEARCH' button.

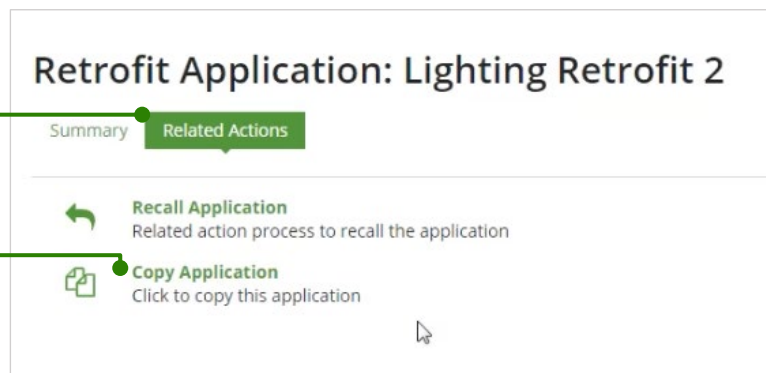
02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

20000043	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
----------	---------------------	---------------------	--------------	---------------------

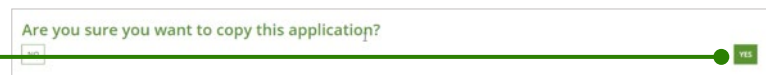
05 Click **Related Actions**.



The screenshot shows the 'Retrofit Application: Lighting Retrofit 2' page. The 'Related Actions' tab is selected, displaying two options: 'Recall Application' and 'Copy Application'. A green line points from the 'Copy Application' option to the next step.

06 Click **Copy Application**.

07 Click **YES**.



The screenshot shows a confirmation dialog box with the text 'Are you sure you want to copy this application?'. There are two buttons: 'NO' and 'YES'. A green line points from the 'YES' button to the next step.

After a few minutes, the new application will appear in your applications record. You will also receive an email notification to edit the application.

Note: The application that is being copied remains unchanged.

Responding to Save on Energy Analyst Edit Requests

Editing an Application

The Save on Energy Analyst may return an application with recommended edits. The **Applicant** or **Applicant Representative** makes the required changes. You will receive an email notification to edit the application. Locate the application ID in the notification email and continue to **step 1**.

01 Click **APPLICATIONS**.

The screenshot shows the 'APPLICATIONS' tab selected in the top navigation bar. Below the navigation bar is a search and filter section with various dropdown menus for 'STARTED ON', 'EST. PROJECT START DATE', 'EST. PROJECT COMPLETION DATE', 'INCENTIVE', 'STATUS', 'APPLICATION STATUS/MESSAGE', and 'HEAD OFFICE'. Below this is a table with columns: Application Id, Company Name, Application Name, Started On, Applicant Rep, Est. Project Start Date, Est. Project Completion Date, Incentive, Status, Application Status Milestone, and Head Office. A green line points from the 'APPLICATIONS' tab to the 'SEARCH' button.

02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

20000043	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
----------	---------------------	---------------------	--------------	---------------------

05 Click **History and Comments** to review any Save on Energy Analyst comments.

The **Recommend Edits** action indicates that the Save on Energy Analyst has suggested edits.

▼ History and Comments						
User	User Role	Action Type	Action	Submitted To	Date and Time (EST)	Comment
Mohammed Dildhar	Toronto Hydro-electric System Limited Lead LDC Analyst	Lead LDC Comment	Allow LDC Edits	None	01/29/2019 01:47 PM	
Mohammed Dildhar	Toronto Hydro-electric System Limited Facility Analyst	Reviewed by Satellite LDC	Recommend Edits	Lead LDC Analyst	01/29/2019 01:32 PM	Does not include project description
Mohammed Dildhar	Toronto Hydro-electric System Limited Facility Analyst	Routed by Satellite LDC	Submit	Facility Analyst	01/29/2019 01:31 PM	test
Mohammed Dildhar	Toronto Hydro-electric system Limited Lead LDC Analyst	Routed by Lead LDC	Route Application	Facility Analyst	01/29/2019 01:30 PM	
Chris Montgomery	Applicant	Submitted by Applicant	The application has been submitted and confirmed, and the applicant agreed to the PA		01/29/2019 01:23 PM	
Chris Montgomery	Applicant	Submitted by Applicant	Submit To LDC	Lead LDC Analyst	01/29/2019 01:23 PM	
Chris Montgomery	Applicant	Submitted by Applicant	Submit To LDC	Lead LDC Analyst	12/19/2018 03:11 PM	
Travis LDC	App Rep	Submit To Applicant	Submit To Applicant	App Unit	12/19/2018 01:46 PM	Done

The required edits are described in the **Comment** column.

Responding to Save on Energy Analyst Edit Requests

Editing an Application

06 Click **EDIT RETURNED APPLICATION**.

07 Make the required edits to the application.

08 Enter a comment.

09 Click **SUBMIT**.

10 Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agree to the participant agreement.

11 Click **SUBMIT**.

The application will now be forwarded to the Save on Energy Analyst for review.

Responding to Save on Energy Analyst Edit Requests

Approving an Edited Application

The Save on Energy Analyst may edit the application during the review process, rather than returning it to be edited. When a Save on Energy Analyst edits the application, it is returned to the Applicant for review. The **Applicant** reviews the changes made by the Save on Energy Analyst. They can either accept all changes or reject all changes (they cannot pick which ones to accept or reject—it is all or nothing).

01 Click **APPLICATIONS**.

The screenshot shows the 'APPLICATIONS' tab selected in the top navigation bar. Below the navigation bar, there is a search and filter section with various dropdown menus. A table with 11 columns is displayed below the filters. A green line starts at the 'APPLICATIONS' tab, goes down to the 'SEARCH' button, and then continues down to the 'Application Id' column header in the table.

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
20000043		Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM					

02 Click the application ID.

03 Click **SEARCH**.

04 Click the application ID.

20000043	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
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Responding to Save on Energy Analyst Edit Requests

Approving an Edited Application

05 Click **History and Comments** to review any Save on Energy Analyst comments.

History and Comments						
User	User Role	Action Type	Action	Submitted To	Date and Time (EST)	Comment
Dhaval Vyas	Toronto Hydro-electric System Limited Lead LDC Analyst	Lead LDC Comment	Recommend Edits	None	11/09/2018 02:14 PM	Updated the Project Description
Dhaval Vyas	Toronto Hydro-electric System Limited Lead LDC Analyst	Lead LDC Comment	Allow LDC Edits	None	11/09/2018 02:13 PM	

The **Recommended Edits** action indicates that the Save on Energy Analyst edited the application.

The edits made by the the Save on Energy Analyst are described in the **Comment** column.

Note: You can also review any changes made to the application in the **Updated Fields** section.

Updated Fields			
Field Name	Old Value		New Value
Actual Project Start Date			2019-01-09 00:00:00.0
Actual Project Completion Date			2019-01-28 00:00:00.0
Actual Application Energy Saving			200000.0
Actual Application Demand Reduction			8600.0
Actual Application Incentive Amount			63250.0

06 Review the changes made by the Save on Energy Analyst.

Responding to Save on Energy Analyst Edit Requests

Approving an Edited Application

07 Click **EDIT RETURNED APPLICATION**.

08 Click **SUBMIT**.

09 Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agree to the participant agreement.

10 Click **SUBMIT**.

The application will now be forwarded to the Save on Energy Analyst for review.

Submitting an Advance Incentive Request

The **Applicant** or **Applicant Representative** can submit an advance incentive request if the project meets the advance incentive criteria. An advance incentive request is approved as part of the initial application, not after the application is approved.

Applying for a Social Housing Incentive

You can apply for a **social housing incentive** if your project includes a social housing facility.

- 01** Select **Multi-Residential - Social Housing Provider** when completing the **Basic Details** section for the facility.

The screenshot shows the 'Basic Details' section of a form. Green lines and dots indicate the following steps:

- Step 01:** A green line points to the 'Facility Type' dropdown menu, which is set to 'Multi-Residential - Social Housing Provider'.
- Step 02:** A green line points to the 'Are you applying for a Social Housing Adder?' radio button, which is selected (marked with a green dot).
- Step 03:** A green line points to the 'What percentage of your incentive do you want to receive in advance?' input field, which is currently empty.

Other visible fields in the form include:

- Facility Name *:** Social Housing Adder and advance
- Ownership Type *:** -- Select a value --
- Address 1 *:** 120 Adelaide St
- Address 2:** (empty)
- Address 3:** (empty)
- City *:** (empty)
- Province:** ON
- Postal Code *:** (empty)
- Local Distribution Company *:** -- Select an LDC --
- Electric Utility Account *:** (empty)

- 02** Select **Y**.

- 03** Enter the percentage of the incentive you want to receive in advance.
The maximum is 50%.

Submitting an Advance Incentive Request

Applying for a Social Housing Incentive

Estimated Calculation Results				
	Estimated Eligible Costs	Estimated Energy Savings (kWh)	Estimated Demand Reduction (kW)	Estimated Incentive
Prescriptive	\$10,000.00	6,074.640	2.340	\$900.00
Custom	\$0.00	0.000	0.000	\$0.00
Total	\$10,000.00	6,074.640	2.340	\$900.00
Advance Incentive				
Total Advance Incentive	\$0.00	Max SHA Advance Incentive	\$900.00	
Estimated SHA Amount	\$900.00	Approved SHA Advance Incentive	\$0	

The advance incentive amounts are automatically calculated once you've entered all the required facility information.

04 Complete the rest of the facility information and submit the facility (see **Adding Facilities** on p. 27).

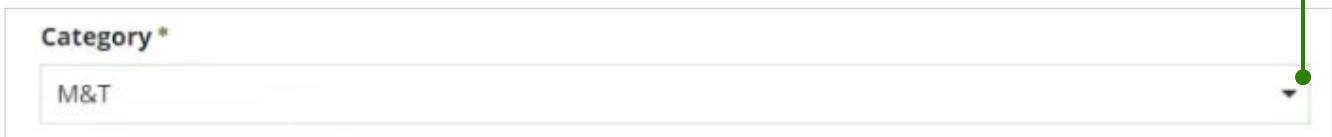
The application will now include the request for a social housing advance incentive.

Submitting an Advance Incentive Request

Applying for a Monitoring and Targeting Incentive


You can apply for a **monitoring and targeting incentive (M&T)** if a facility in your project includes a custom measure in the **M&T** category.

01 Select **M&T** when completing the **Manage Custom Measures** section for the facility.



A screenshot of a web form showing a dropdown menu labeled "Category *". The dropdown is open, and "M&T" is selected. A green line with a dot at the end points from the text "01 Select M&T" to the "M&T" option in the dropdown.

02 Select **Yes**.



A screenshot of a web form with two columns. The left column is titled "M&T Advance Incentive Requested" and contains two radio buttons: "Yes" (which is selected, indicated by a green dot) and "No". The right column is titled "Maximum M&T Advance Incentive" and contains the text "\$0". A green line with a dot at the end points from the text "02 Select Yes." to the "Yes" radio button.

Submitting an Advance Incentive Request

Applying for a Monitoring and Targeting Incentive

03 Complete the mandatory fields in the **Other Details** section.

Other Details

Estimated Base Case Consumption (kWh) *
100000000

Estimated Energy Efficient Case Consumption (kWh) *
999999

Estimated Consumption Savings
99,000,001.000 kWh

Estimated Custom Measure Installation Cost *
700000

Please enter all other one-time costs including labour, design, project management, shipping, delivery, duties, disposal, inspection, and Measurement and Verification (M&V)

Estimated Equipment Cost *
500000

Please enter equipment cost.

Note: Enter energy and demand values for all equipment involved in the custom measure. Demand Savings (kW) are the average load reduction in electricity demand between the Base Case and the Energy Efficient Case occurring between 1 pm to 7 pm on business days, June 1 through August 31. For Measures that are weather dependent, Demand Savings shall be considered as occurring at peak design load conditions.

Estimated Base Case Demand (kW) *
10

Estimated Energy Efficient Case Demand (kW) *
10

Estimated Demand Reduction
0.000 kW

Estimated Calculated Incentive Amount
\$4,950,000.00

Calculated incentive is based upon Consumption (kWh)

CANCEL **SAVE TO DRAFT** **APPLY**

04 Click **APPLY** to add the measure to the facility.

When you submit the measure, the value of the M&T advance incentive is automatically calculated. The amount will be a maximum of 35% of your calculated incentive, subject to your Save on Energy Analyst's approval.

Custom Measure Name *
Unnamed Custom Measure

Category *
M&T

M&T Advance Incentive Requested
☒ Yes ☐ No

Maximum M&T Advance Incentive
\$3,500.00

05 Complete the rest of the facility information and submit the facility (see **Adding Facilities** on p. 27).

The application will now include the request for an M&T advance incentive.

Submitting an Advance Incentive Invoice

The **Applicant** or **Applicant Representative** can submit an advance incentive invoice, if applicable, once the advance incentive is approved.

Note: A final incentive invoice may only be submitted when the Save on Energy Analyst has requested one.

01 Click **APPLICATIONS**.

PENDING ACTIONS APPLICATIONS BEGIN NEW APPLICATION

Q: 2000043 SEARCH STARTED ON: Any EST. PROJECT START DATE: Any EST. PROJECT COMPLETION DATE: Any

INCENTIVE: Any STATUS: Any APPLICATION STATUS MILESTONE: Any HEAD OFFICE: Any

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
2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019		Feb 25, 2019	Mar 1, 2019	\$2,250.00	Pre-Project Application Approved	Pre-project review	N

02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019	Feb 25, 2019	Mar 1, 2019
---------	---------------	------------------------	--------------	--------------	-------------

05 Review the advance incentive details in the **Estimated Calculation Results** section of the application.

Estimated Calculation Results			
Energy, Demand, and Incentive Information			
Estimated Application Eligible Cost	\$10,000.00	Estimated Application Energy Saving	6,074.640 kWh
Estimated Application Incentive Amount	\$900.00	Estimated Application Demand Reduction	2.340 kW
Advance Incentive			
Total Approved Advance Incentive	\$500.00	Maximum SHA Incentive	\$900.00
Total Approved Advance Incentive	\$500.00	Estimated SHA Incentive	\$900.00

This is the maximum amount you can submit an invoice for.

Submitting an Advance Incentive Invoice

06 Click **SUBMIT/EDIT ADVANCE INCENTIVE INVOICE**.

Retrofit Application: Acme Retrofit Lighting

Summary Related Actions

SUBMIT/EDIT ADVANCE INCENTIVE INVOICE PREPARE POST-PROJECT SUBMISSIONS

07 Click **UPLOAD**.

You can also drag a file to the **Drop file here** field.

Application Invoice Submission

Invoice Amount \$500.00

Lighting

Advance Incentive Invoice *

UPLOAD Drop file here

Comment

CANCEL SUBMIT

08 Double-click the invoice document you want to attach.

09 Enter a comment, if required (comments are optional).

10 Click **SUBMIT**.

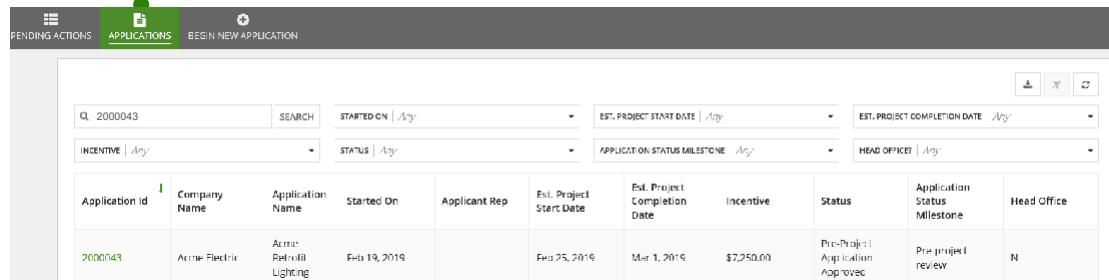
The Save on Energy Analyst will now receive a notification to review the advance incentive invoice.

Amending an Approved Application

The **Applicant** or **Applicant Representative** can amend an application after it has been approved by the Save on Energy Analyst.

Note: Once a post-project submission has been started, the pre-project application cannot be amended.

01 Click **APPLICATIONS**.



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
2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019		Feb 25, 2019	Mar 1, 2019	\$7,250.00	Pre-Project Application Approved	Pre-project review	N

02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019	Feb 25, 2019	Mar 1, 2019
---------	---------------	------------------------	--------------	--------------	-------------

Amending an Approved Application

05 Click **Related Actions**.

Retrofit Application: Acme Retrofit Lighting

Summary **Related Actions**

- Initiate Application Amendment**
Click to initiate a new amendment
- Prepare Post-Project Submission**
Initiate post-project process for Retrofit application
- Copy Application**
Click to copy this application

06 Click **Initiate Application Amendment**.

07 Enter the reason for the amendment.

Application Amendment Initiation

Reason *

CANCEL INITIATE

08 Click **INITIATE**.

Amending an Approved Application

09 Click **YES**.

This Amendment is subject to LDC approval. Are you sure, you want to continue?

10 Make any required changes to the application.

11 Enter a comment.

> History and Comments

Comment

☐ I certify that work for this Application has not been started *

Invoice Documents

Invoice Type	Invoice Accepted	Upload Date	Document Name
Initial	✓	11/12/2018 1:31 PM EST	Test Invoice.docx

12 Select this box to certify that work for the application has not been started.

13 Click **SUBMIT**.

Amending an Approved Application

Note: Only an **Applicant** can submit the application. If an Applicant Representative amends the application, they must forward it to the Applicant, who submits it to the Save on Energy Analyst.

Enter a comment if required.

Click **SUBMIT TO APPLICANT**.

> History and Comments

Comment

Looks Good

DELETE

SAVE SUBMIT TO APPLICANT

The Applicant will receive an email notification to review and submit the application.

14 Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agree to the participant agreement.

Application Approval

You have now reached the final stage before your RETROFIT Application can be submitted to your local electric utility for review and pre-approval. If you commence your Project prior to receiving pre-approval, you will not be eligible to receive a Participant Incentive.

PRIOR TO Commencing your Project(s)	AFTER Completing your Project(s)
Ensure that the LDC has pre-approved this Application and your Participant Agreement	You must submit evidence of Project completion in order to receive your Participant Incentive

I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. *

☐ Yes

I have read and agree to the Participant Agreement. *

☐ Yes

From now all communication for this application should go to my App Rep.

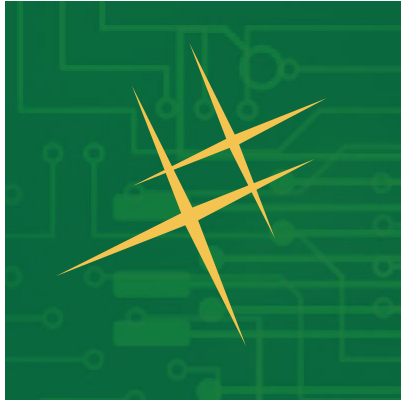
☐ Yes

☐ No

BACK TO APPLICATION SUBMIT

15 Click **SUBMIT**.

The Save on Energy Analyst will now receive an email notification to review the amended application.



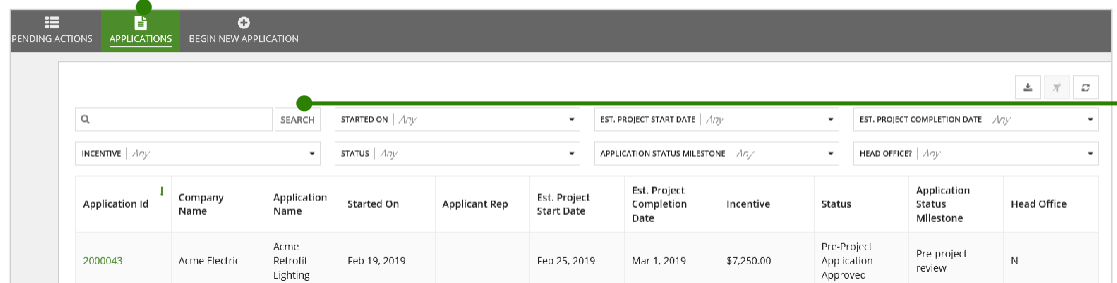
Post-Project Submissions

Creating a Post-Project Submission

The **Applicant** or **Applicant Representative** creates the post-project submission once the pre-project application status is “Pre-Project Application Approved”.

Beginning the Post-Project Submission

01 Click **APPLICATIONS**.



Navigation: PENDING ACTIONS | **APPLICATIONS** | BEGIN NEW APPLICATION

Search filters: Q [] SEARCH | STARTED ON | Any | EST. PROJECT START DATE | Any | EST. PROJECT COMPLETION DATE | Any | INCENTIVE | Any | STATUS | Any | APPLICATION STATUS MILESTONE | Any | HEAD OFFICE | Any

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
2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019		Feb 25, 2019	Mar 1, 2019	\$2,250.00	Pre-Project Application Approved	Pre project review	N

02 Enter any application information in the search field (e.g., application ID or name) and click **SEARCH** to find the application.

03 Click the application ID.

2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019	Feb 25, 2019	Mar 1, 2019
---------	---------------	------------------------	--------------	--------------	-------------

04 Click **PREPARE POST-PROJECT SUBMISSION**.

Retrofit Application: Acme Retrofit Lighting

PREPARE POST-PROJECT SUBMISSION

05 Click **CONTINUE TO APPLICATION**.

Retrofit Application: Acme Retrofit Lighting

Summary | **Related Actions**

Prepare Post-Project Submission

CANCEL | **CONTINUE TO APPLICATION**

This step creates a new post-project submission to be completed and brings you to the post-project submission main page.

Creating a Post-Project Submission

Entering Project Data

01 Click the **green arrow** to open and edit a facility.

▼ **Manage Facilities**

Updated?	Facility Name	Address 1	City	Actual Facility Capped Incentive Amount	Project Description	Status	
No	IESO Lighting	120 Adelaide	Toronto	\$0	Lighting Retrofit	Incomplete	→

02 Enter the **actual project start date** and **actual project end date**.

▼ **Basic Details**

Facility Name IESO Lighting
Facility Type Commercial - Large Office
Electric Utility Account 35135135
Ownership Type Owner
Address 1 120 Adelaide
Address 2
City Toronto
Province ON
Postal Code M5A1R1
Local Distribution Company TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

Actual Project Start Date **Actual Project End Date ***
 Estimated value: 11/5/2018 Estimated value: 11/15/2018
Description Lighting Retrofit

The estimated project start date and end date from the application are provided.

Note: As you enter and submit data there are a variety of validations that are applied to ensure data integrity.

Creating a Post-Project Submission

Entering Project Data

- 03** Click the **green arrow** to open a prescriptive measure. If the facility does not include any prescriptive measures, continue to **step 10**.

Prescriptive Measures							
Updated?	Measure Category	Measure Name	Measure Description	Actual Quantity	Actual Calculated Incentive Amount	Status	
No	Lighting	INTEGRAL LED TROFFERS	2' x 2' LED troffer (= 2000 Lumens)		\$0	Incomplete	→ ✖

- 04** Enter the **actual quantity** for the measure.

- 05** Update any other mandatory fields as required.

Basic Details	
Measure Category	Lighting
End Use	Lighting -Large Office
Conservation Measure Name	INTEGRAL LED TROFFERS
Conservation Measure Description	2' x 2' LED troffer (= 2000 Lumens)
Incentive Per Unit	\$35.00
Eligibility Criteria	The product must be categorized by the Design Lights Consortium List (DLC) as a "Indoor Luminaires - Troffer" and the product must be approved and listed on the DLC Qualified Products List.
Assumed Base Case	Ubend 32W- 2 lamp T8
Manufacturer *	XYZ
Actual Quantity *	20
	Estimated value: 25.000
Model Number *	123
ES DLC Code	XGD3513
kW Reduction	0.520 kW
	Estimated value: 0.650
kWh Savings	1877.2
	Estimated value: 2,346.500
Actual Incentive	\$700.00
	Estimated value: 875.000

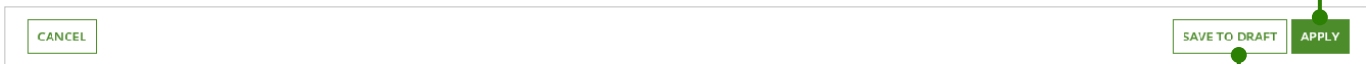
The estimated value from the application is provided.

These values are automatically calculated when you enter the actual quantity.

Creating a Post-Project Submission

Entering Project Data

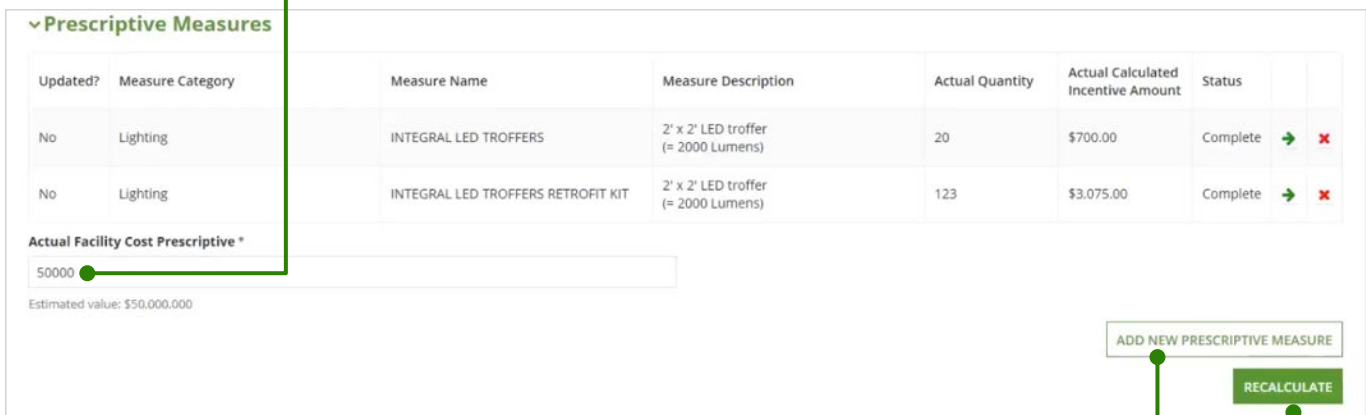
06 Click **APPLY** to add the measure to the facility.



Click **SAVE TO DRAFT** if you want to save a draft of the measure.

07 Repeat steps 3–6 until you have entered the actual quantity for all prescriptive measures for the facility.

08 Enter the actual facility cost for all prescriptive measures. The **RECALCULATE** button will now appear.



Updated?	Measure Category	Measure Name	Measure Description	Actual Quantity	Actual Calculated Incentive Amount	Status		
No	Lighting	INTEGRAL LED TROFFERS	2' x 2' LED troffer (= 2000 Lumens)	20	\$700.00	Complete	→	✗
No	Lighting	INTEGRAL LED TROFFERS RETROFIT KIT	2' x 2' LED troffer (= 2000 Lumens)	123	\$3,075.00	Complete	→	✗

Actual Facility Cost Prescriptive *
50000
Estimated value: \$50,000.00

ADD NEW PRESCRIPTIVE MEASURE
RECALCULATE

You can add a new prescriptive measure in the post-project submission phase, but it must be in the same category as a measure that was approved in the project application.

09 Click **RECALCULATE**.

Creating a Post-Project Submission

Entering Project Data

- 10** Click the **green arrow** to open a custom measure. If the facility does not include any custom measures, continue to **step 14**.

▼ Custom Measures

Updated?	Custom Measure Category	Custom Measure Name	Actual Calculated Incentive Amount	Actual kWh Savings	Actual kW Reduction	Status
No	Lighting	Exterior Lighting	\$0.00			Incomplete

- 11** Complete the mandatory fields in the **Other Details** section.

Enter the actual base consumption.

Enter the actual energy efficient case consumption.

The actual consumption savings is automatically calculated based on the actual consumption values.

Enter the actual base case demand.

▼ Other Details

Actual Base Case Consumption (kWh) *

150000000

Estimated value: 100,000,000.000kWh

Actual Energy Efficient Case Consumption (kWh) *

0

Estimated value: 999,999,000kWh

Actual Consumption Savings

150,000,000.000 kWh

Estimated value: 99,000,001.000kWh

Actual Custom Measure Installation Cost *

700000

Estimated value: \$70,000,000

Actual Equipment Cost *

50000

Estimated value: \$50,000,000

Actual Base Case Demand (kW) *

0

Estimated value: 10.000kW

Actual Energy Efficient Case Demand (kW) *

0

Estimated value: 10.000kW

Actual Demand Reduction

0.000 kW

Estimated value: 0.000kW

Actual Calculated Incentive Amount *

\$7,500,000.00

Estimated value: 4,950,000.050, Actual Incentive is based upon Consumption (kWh)

The estimated value is provided under each field.

Enter the actual equipment cost.

Enter the actual custom measure installation cost.

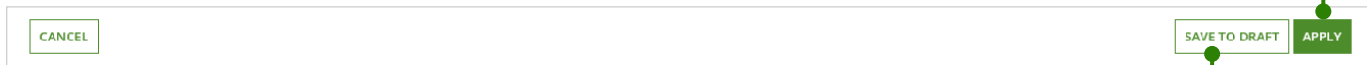
The actual demand reduction and incentive amount are calculated based on the actual demand values.

Enter the actual energy efficient case demand.

Creating a Post-Project Submission

Entering Project Data

12 Click **APPLY** to add the measure to the facility.



A horizontal bar containing three buttons: 'CANCEL' on the left, 'SAVE TO DRAFT' in the middle, and 'APPLY' on the right. A green line originates from the text 'Click APPLY' and points directly to the 'APPLY' button.

Click **SAVE TO DRAFT** if you want to save a draft of the measure.

13 Repeat steps 9–12 until you have entered the data for all custom measures for the facility.

Creating a Post-Project Submission

Entering Project Data

14 Review the **Actual Calculation Results** section for the facility.

▼ Actual Calculation Results

	Actual Eligible Costs	Actual Energy Savings (kWh)	Actual Demand Reduction (kW)	Actual Incentive
Prescriptive	\$0.00 Estimated value: \$0.000	0.000 Estimated value: 0.000kWh	0.000 Estimated value: 0.000kW	\$0.00 Estimated value: \$0.000
Custom	\$750,000.00 Estimated value: \$120,000.000	150,000,000.000 Estimated value: 99,000,001.000kWh	0.000 Estimated value: 0.000kW	\$375,000.00 Estimated value: \$60,000.000
Total	\$750,000.00 Estimated value: \$120,000.000	150,000,000.000 Estimated value: 99,000,001.000kWh	0.000 Estimated value: 0.000kW	\$66,000.00 Estimated value: \$60,000.000

CANCEL DELETE SAVE TO DRAFT **APPLY**

15 Click **APPLY** to add the facility to the application.

16 Repeat steps 1–15 as required if your project includes more than one facility.

The post-project submission is now ready to be submitted.

If you're an **Applicant Representative**, you must forward the post-project submission to the Applicant. Continue to **Forwarding the Post-Project Submission to the Applicant** on p. 73.

If you're an **Applicant**, continue to **Submitting the Post-Project Submission** on p. 74.

Creating a Post-Project Submission

Forwarding the Post-Project Submission to the Applicant

01 Enter a comment.

> History and Comments

Comment

Looks Good

DELETE SAVE SUBMIT TO APPLICANT

02 Click **SUBMIT TO APPLICANT**.

The Applicant will receive an email notification to review the post-project submission.

Creating a Post-Project Submission

Submitting the Post-Project Submission

Only the **Applicant** can submit the post-project submission to the Save on Energy Analyst.

If you created the post-project submission, continue to **step 6**.

If an **Applicant Representative** created the post-project submission, you will receive an email notification to review the post-project submission. You must review it before it can be submitted. Continue to **step 1**.

01 Click **PENDING ACTIONS**.

The screenshot shows the 'Task List' interface. At the top, there is a navigation bar with several tabs: 'PENDING ACTIONS', 'APPLICATIONS', 'BATCH APPLICATION ROUT...', 'BULK UPDATE APPLICANT/...', and 'PAPER COPY APPLICATION'. The 'PENDING ACTIONS' tab is selected and highlighted in green. A green line points from the text '01 Click PENDING ACTIONS.' to this tab. Below the navigation bar, there is a search section with various filters: 'Application Id' (with a dropdown showing '2000409'), 'Company Name', 'Application Name', 'Lead LDC' (with a dropdown showing '--- Select a Value ---'), and 'Application Status Milestone' (with a dropdown showing '--- Select a Value ---'). There are also fields for 'Task Created From' and 'Task Created To' with date pickers. A 'RESET' button is located below these fields. Below the search section is a table with columns: 'Name', 'Company Name', 'Application Name', 'Application Id', 'Task Created', 'Lead LDC', 'Application Status Milestone', and 'Application Track'. The table contains one row of data: 'Review Pre-Project Application 2000409: Lighting Retrofit Amendment Version: 1', 'Ret-1355 Step 25 To', 'Lighting Retrofit', '2000409', '6/27/2019 1:43 PM EST', 'Ontario IMO', 'Pre-project review', and 'Prescriptive & Custom'.

02 Enter the application ID.

03 Click **RESET**.

This is a close-up of the 'Task Created From' and 'Task Created To' fields. Both fields have date pickers showing 'mm/dd/yyyy'. Below these fields is a 'RESET' button. A green line points from the text '03 Click RESET.' to this button.

Creating a Post-Project Submission

Submitting the Post-Project Submission

04 Click **Review Post-Project Application** “Project ID: Project Name”.

Task List

Search By:

Application Id: Company Name: Application Name: Lead LDC: Application Status Milestone:

Task Created From: Task Created To:

Name	Company Name	Application Name	Application Id	Task Created	Lead LDC	Application Status Milestone
Review Post-Project Application 2000127	Weland Forge	IGH	2000127	3/9/2019 5:44 PM EST	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED	Pre-project review

05 Review all components of the post-project submission and make any edits as required.

06 Enter a comment, if required (comments are optional).

Comment

Looks good

If the post-project submission was completed by an Applicant Representative, you can click **SEND TO APP REP** to return it to them, if required.

07 Click **SUBMIT**.

Creating a Post-Project Submission

Submitting the Post-Project Submission

- 08** Select **Yes** to indicate that all the information in the post-project submission is correct and to indicate that you have read and agree to the participant agreement.

Application Approval

You have now reached the final stage before your RETROFIT Application can be submitted to your local electric utility for review and pre-approval. If you commence your Project prior to receiving pre-approval, you will not be eligible to receive a Participant Incentive.

PRIOR TO Commencing your Project(s)
Ensure that the LDC has pre-approved this Application and your Participant Agreement

AFTER Completing your Project(s)
You must submit evidence of Project completion in order to receive your Participant Incentive

I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. *

☒ Yes

I have read and agree to the Participant Agreement. *

☒ Yes

From now all communication for this application should go to my App Rep.

☐ Yes

☐ No

[BACK TO APPLICATION](#)[SUBMIT](#)

- 09** Click **SUBMIT**.

The Save on Energy Analyst will now receive an email notification to review the post-project submission.

Creating a Post-Project Submission

Submitting the Post-Project Submission

Note: After you have submitted your post-project submission, you have the option of viewing the current or pre-approved version of the application.

Lighting Retrofit 2 Application Id
102066

Pre-Project Application Pre-Project Review

Application Version

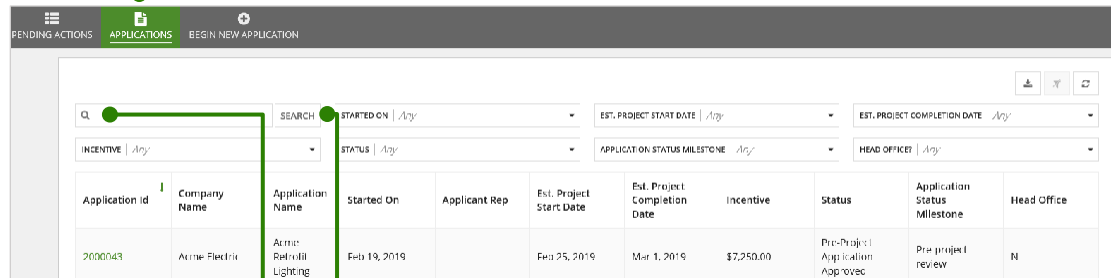
☒ Current ☐ Pre-Approved

Submitting an Invoice

The **Applicant** submits the invoice once the post-project submission has been approved by the Save on Energy Analyst.

Note: A final incentive invoice may only be submitted when the Save on Energy Analyst has requested one. You will receive an email notification to edit the application. Locate the application ID in the notification email and continue to **step 1**.

01 Click **APPLICATIONS**.



Navigation: PENDING ACTIONS | **APPLICATIONS** | BEGIN NEW APPLICATION

Search filters: SEARCH, INCENTIVE, STARTED ON, EST. PROJECT START DATE, EST. PROJECT COMPLETION DATE, STATUS, APPLICATION STATUS MILESTONE, HEAD OFFICE

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
2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019		Feb 25, 2019	Mar 1, 2019	\$7,250.00	Pre-Project Application Approved	Pre-project review	N

02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019	Feb 25, 2019	Mar 1, 2019
---------	---------------	------------------------	--------------	--------------	-------------

05 Click **SUBMIT/EDIT FINAL INVOICE**.

Retrofit Application: Multi Site Demonstration

Summary | Related Actions

SUBMIT/EDIT FINAL INVOICE

Submitting an Invoice

06 Click **UPLOAD**.

You can also drag a file to the **Drop file here** field.

The screenshot shows a web form titled "Application Invoice Submission". It contains the following elements: "Invoice Amount \$1,925.00", "Multi Site Demonstration", a "Final Invoice*" section with an "UPLOAD" button and a "Drop file here" area, a "Comment" text area, a "CANCEL" button, and a "SUBMIT" button. Green lines with dots at the end point from the instructional text to the "UPLOAD" button, the "Drop file here" area, the "Comment" text area, and the "SUBMIT" button.

07 Double-click the invoice document you want to attach.

08 Enter a comment.

09 Click **SUBMIT**.

The Save on Energy Analyst will now receive an email notification to review the invoice.

