SAVE ON ENERGY™
POWER WHAT'S NEXT

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	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. **Only the Applicant can submit applications or post-project submissions.**
Applicant Representative	An Applicant Representative is an *optional* surrogate that creates the application and post-project submission on the Applicant's behalf. **An Applicant Representative cannot submit applications or post-project submissions.**
Save on Energy Analyst	The Save on Energy Analyst manages Retrofit projects for the IESO. They review and provide final approval on all applications and post-project submissions.

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.**

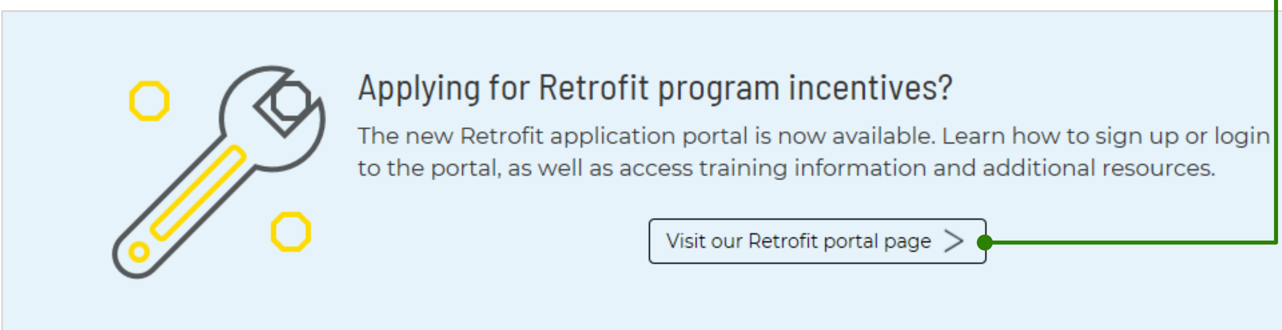
03 Click **Programs and Incentives.**

04 Select **Retrofit program**.

Registering for the Retrofit Program

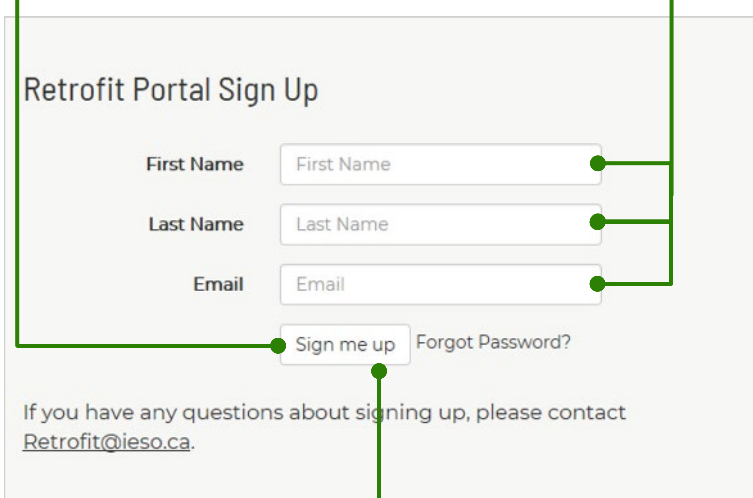
Step 1: Registering for the Okta Portal

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



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

07 Click **Sign me up.**

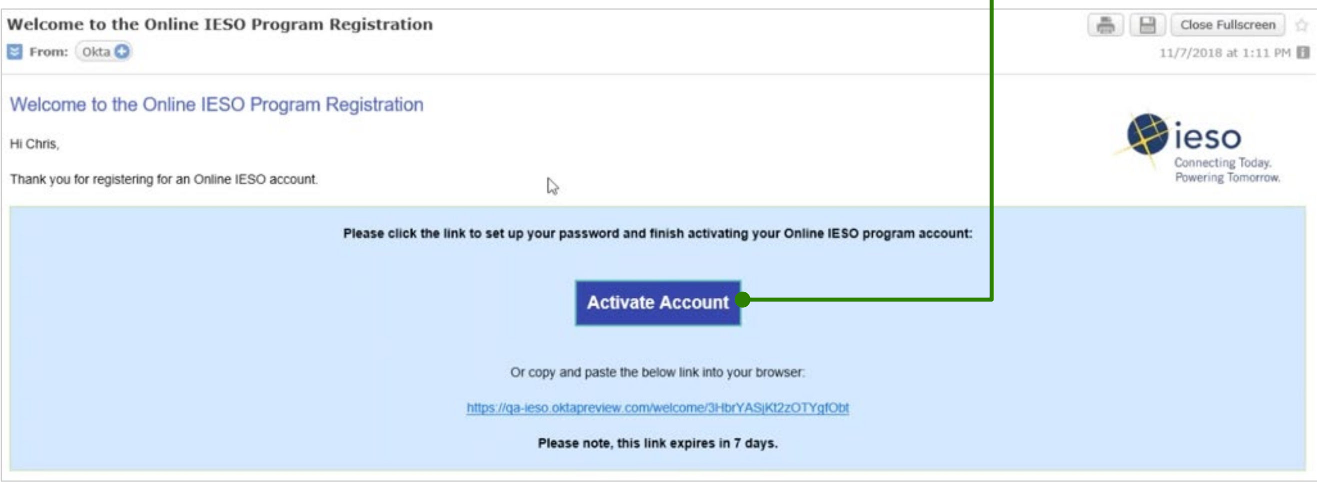


When you click Sign me up, an activation email is sent to your email address.

Registering for the Retrofit Program

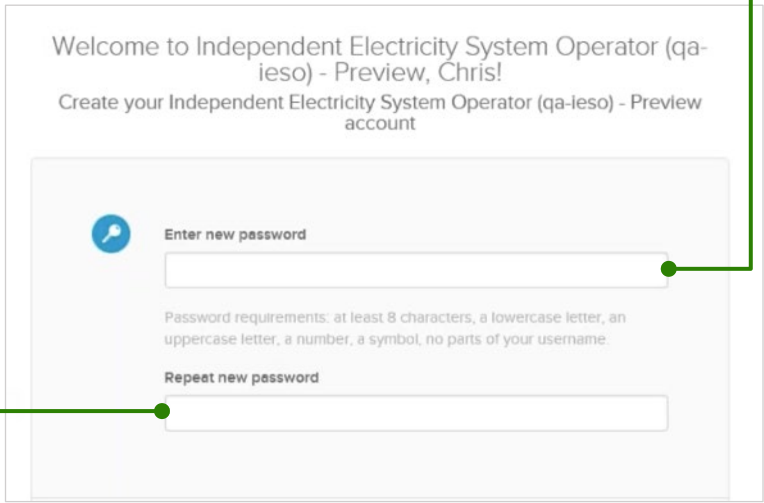
Step 1: Registering for the Okta Portal

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



09 Enter a password.

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

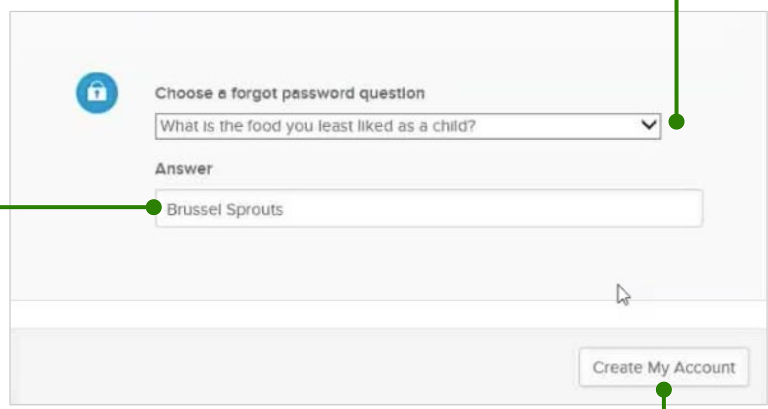


Registering for the Retrofit Program

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.

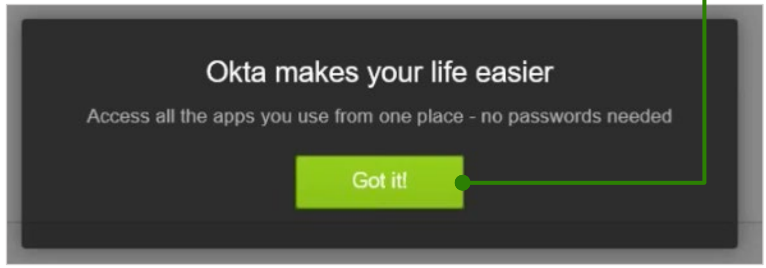
12 Enter the answer to the question.



13 Click **Create My Account.**

This step brings you to the Okta portal.

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

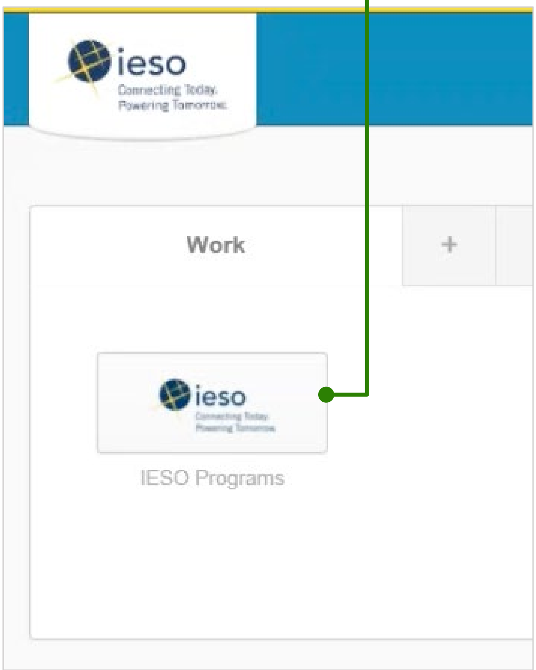


You can now register for the Retrofit program.

Registering for the Retrofit Program

Step 2: Registering for the Retrofit Program

01 Click the **IESO logo**.



02 Click **Register for Retrofit.**

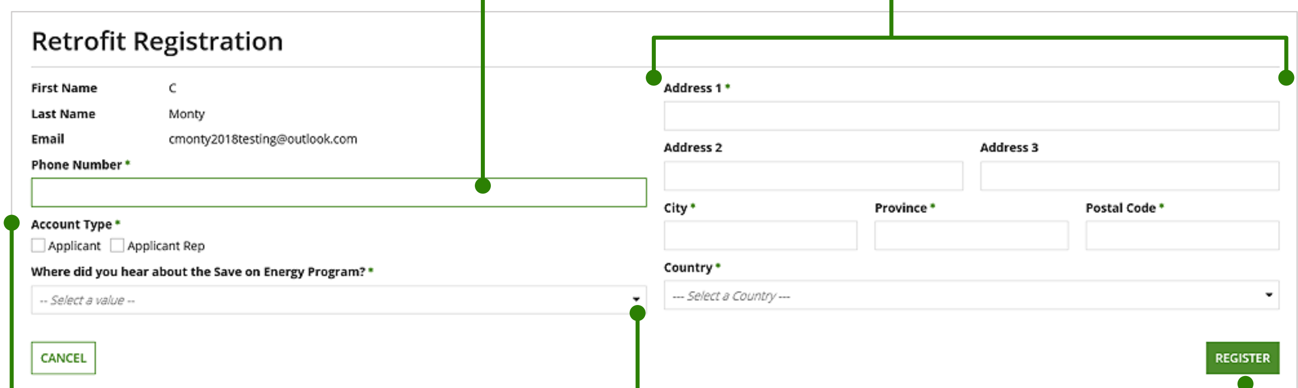
Registering for the Retrofit Program

Step 2: Registering for the Retrofit Program

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

Enter a contact number.

Complete the address section.



Select the account type.
You can register as an Applicant, Applicant Representative or both.

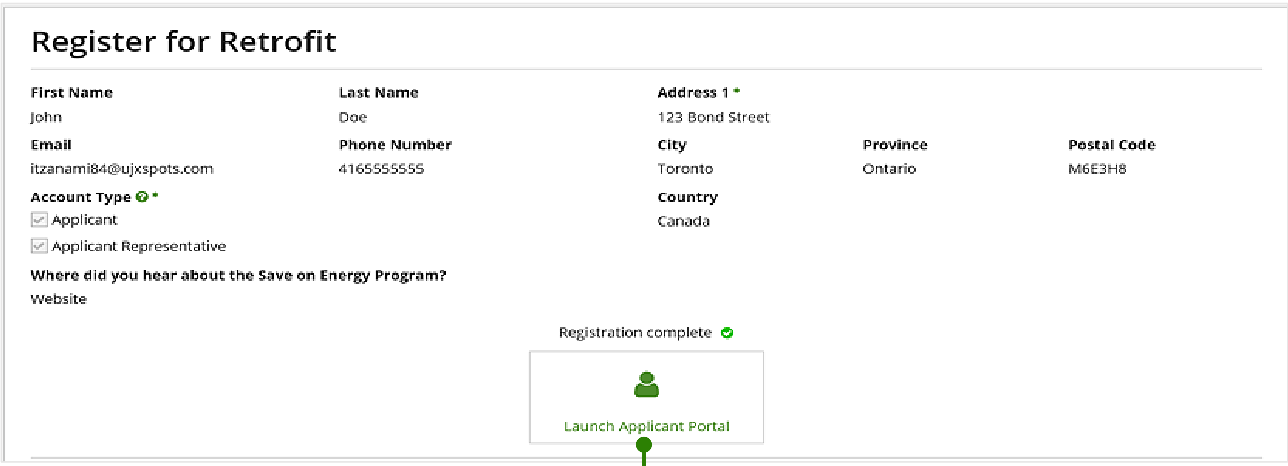
Select where you heard about the Save on Energy Program.

04 Click **REGISTER.**

Registering for the Retrofit Program

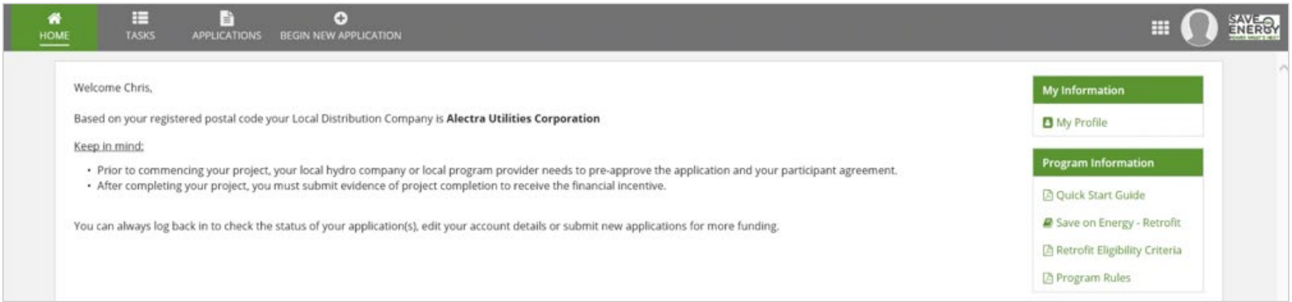
Step 2: Registering for the Retrofit Program

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



06 Click **Launch Applicant Portal.**

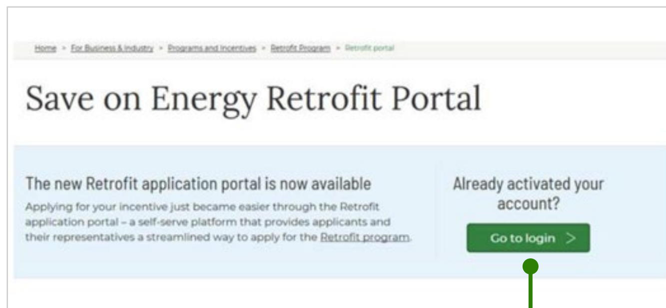
This final step brings you to the Retrofit Portal **Home** page.



Logging into the Retrofit Portal

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

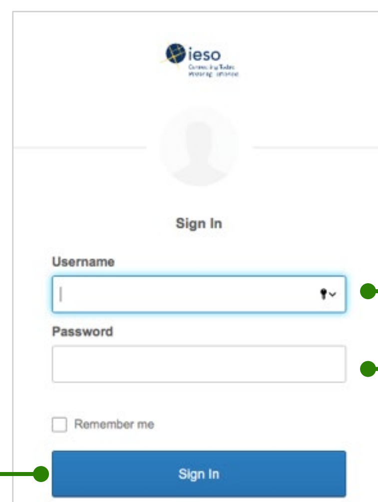
Note: This link will not work in Google Chrome. If you're using Google Chrome, use **http://www.retrofitportal.ca** to open the Retrofit portal login page.



02 Click **Go to login**.

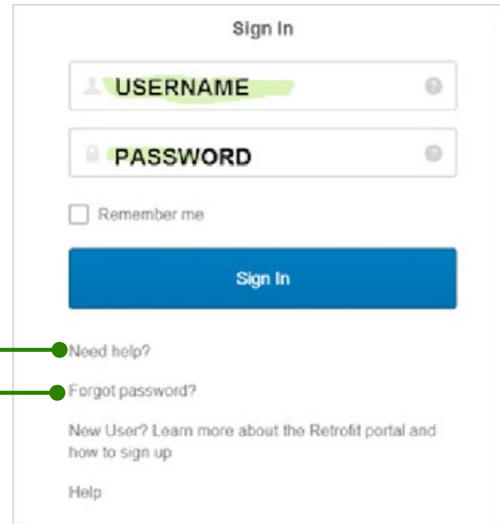
03 Enter your username and password.

04 Click **Sign in**.



Logging into the Retrofit Portal

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

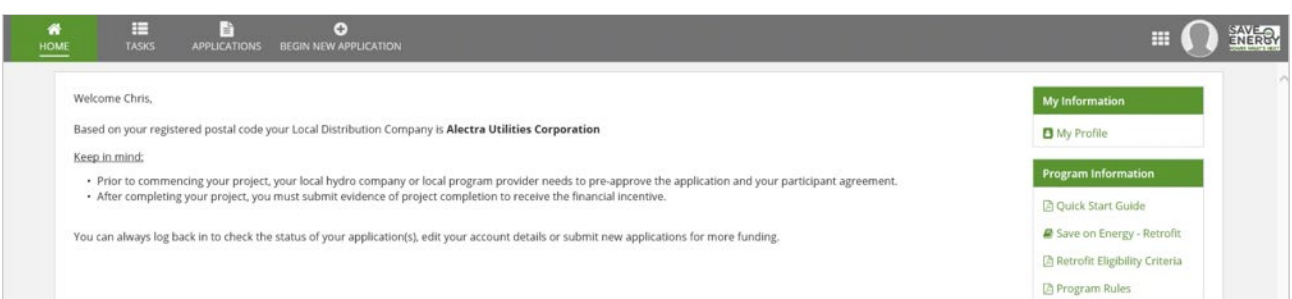


Click **Need help?**

Click **Forgot password?**

05 Click **Submit a Retrofit Application.**

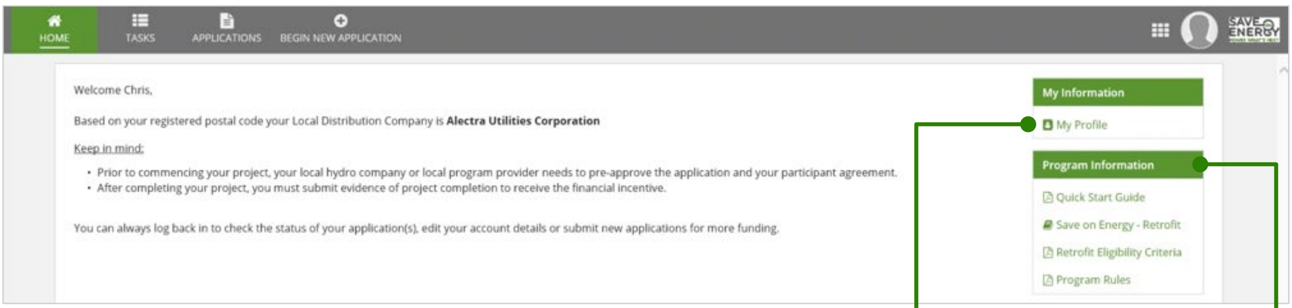
This final step opens the Retrofit Portal **Home** page.



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.

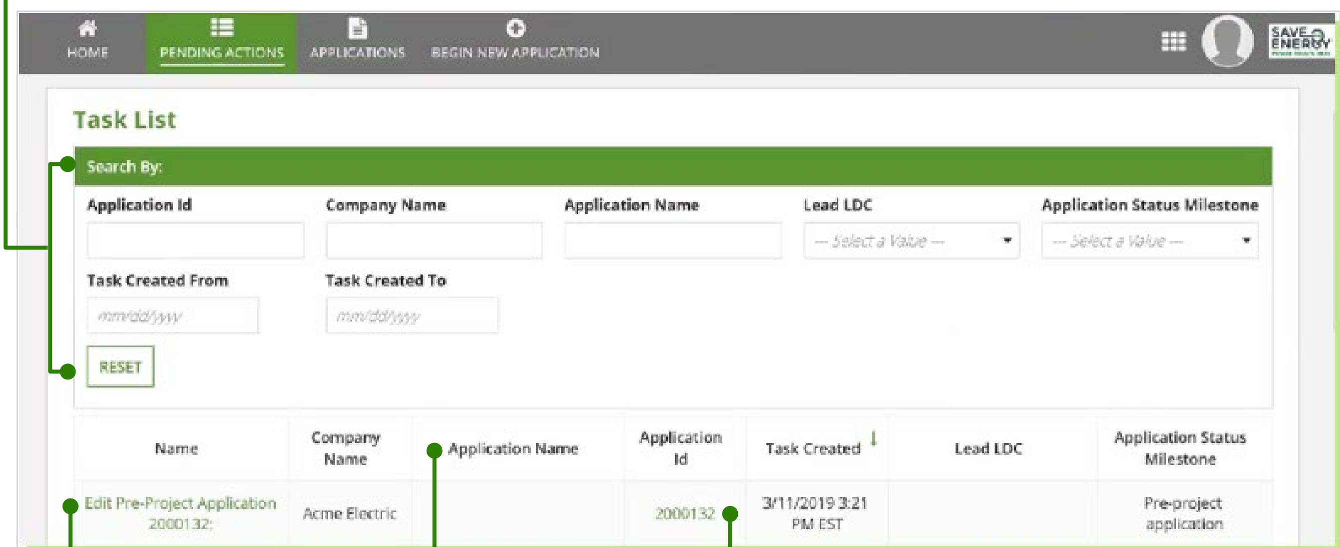
A variety of Retrofit program information is available.

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.



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.

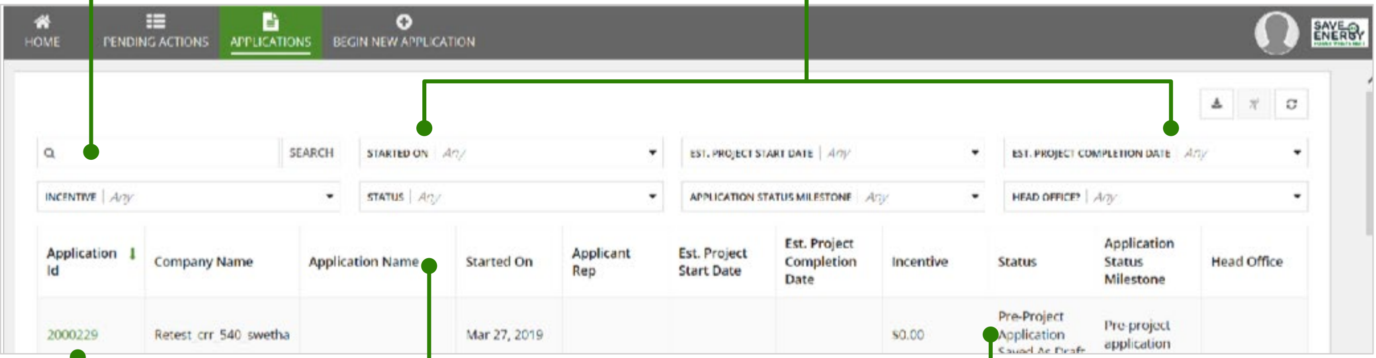
Retrofit Portal Overview

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.



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

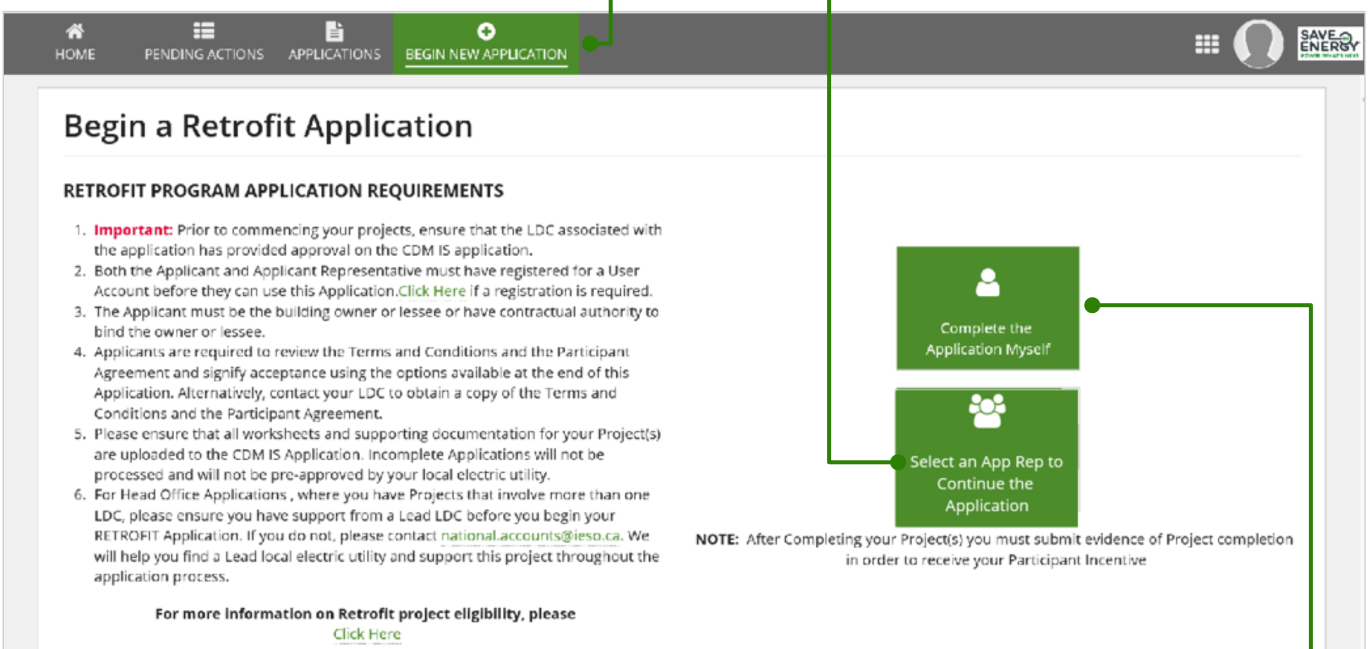
Creating an Application

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**.



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

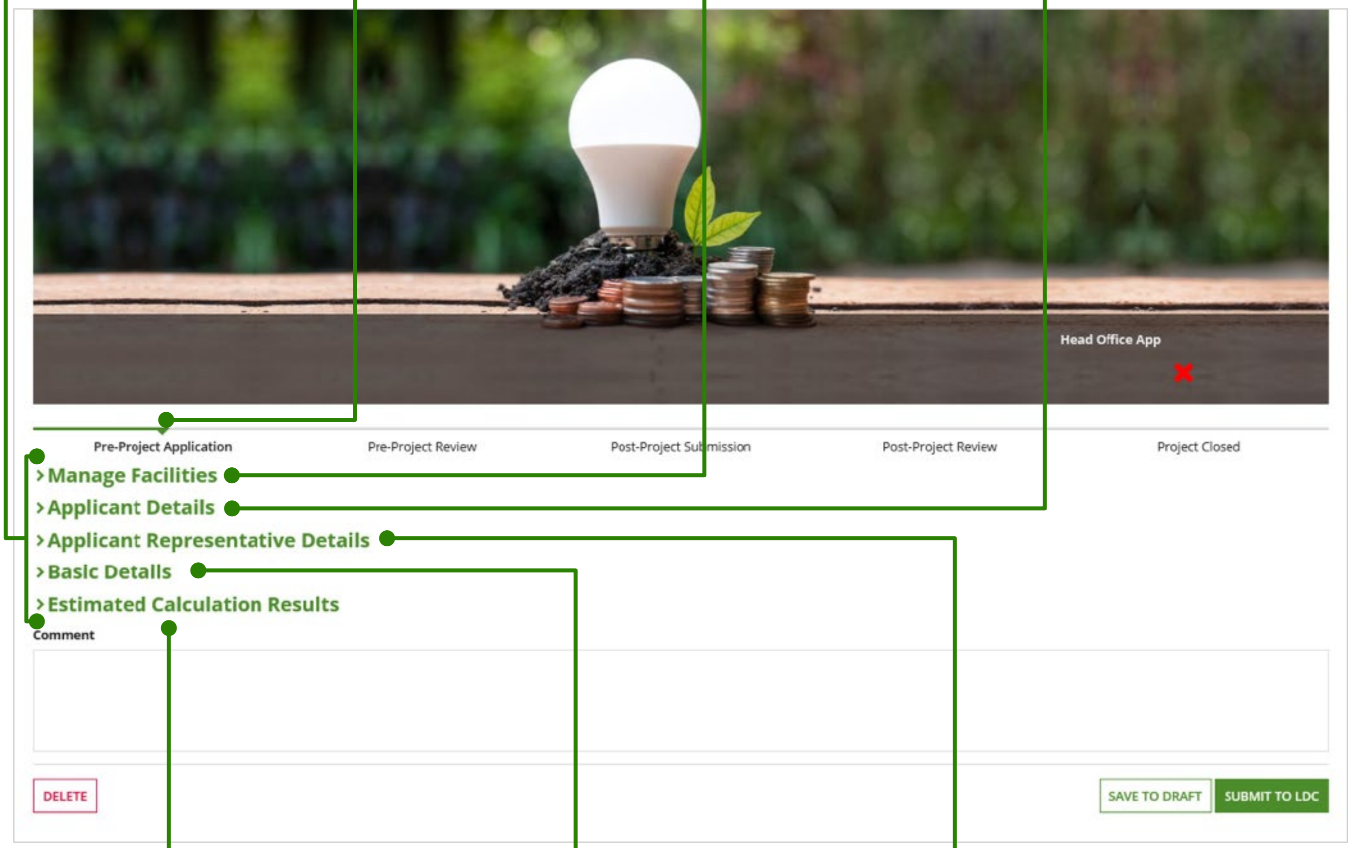
Beginning the Application (as an Applicant)

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.



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**.

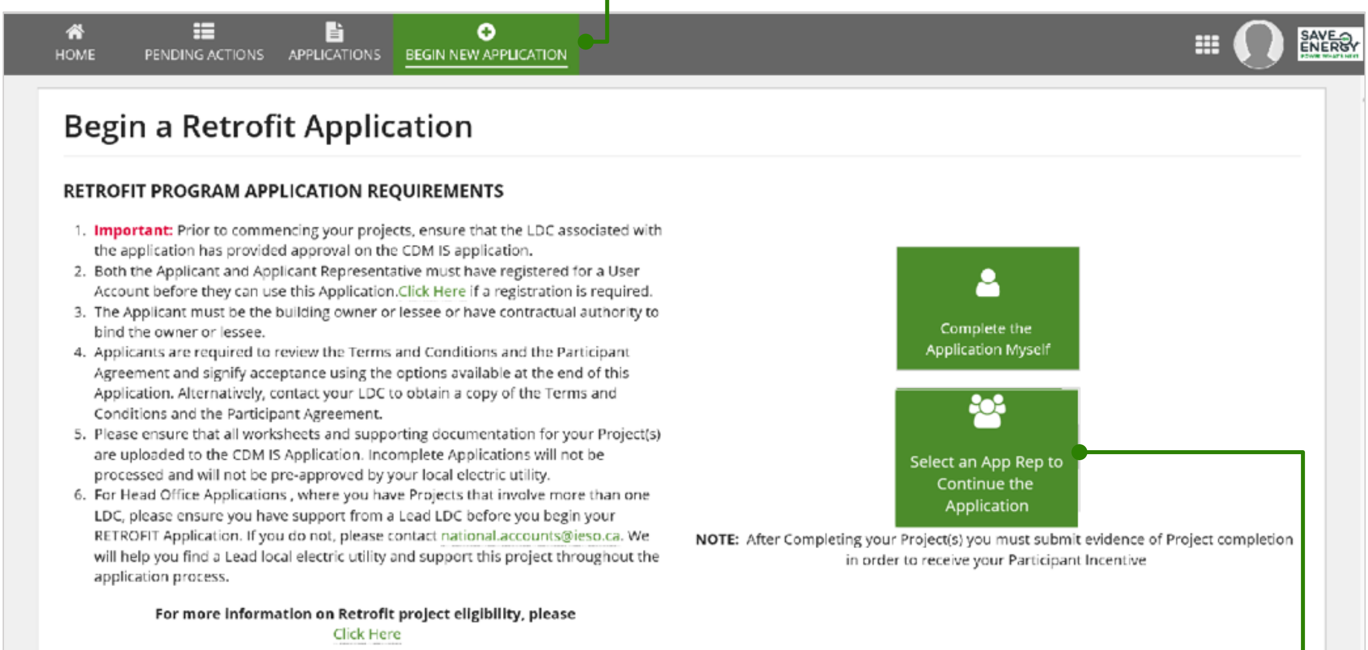
Creating an Application

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.**



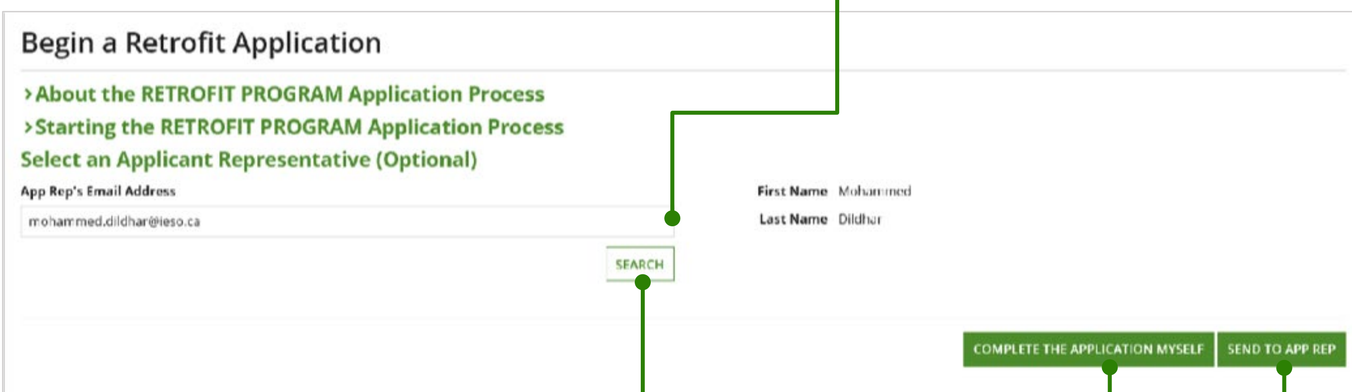
02 Click **Select an App Rep to Continue the Application.**

Creating an Application

Beginning the Application (as an Applicant)

Assigning an Application to an Applicant Representative

03 Enter the Applicant Representative's email address.



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

04 Click **SEARCH**.

05 Click **SEND TO APP REP.**

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

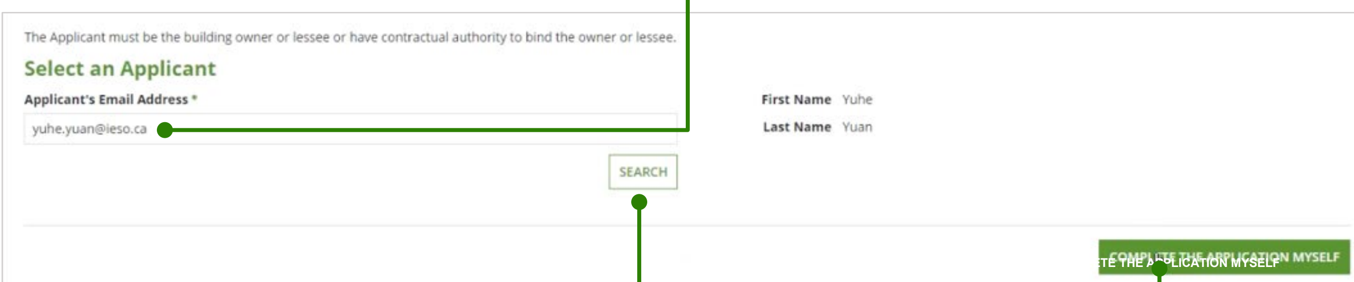
When the application is complete, you will need to review it before submitting it to the Save on Energy Analyst. See **Submitting the Application** on **p. 43**.

Creating an Application

Beginning the Application (as an Applicant Representative)

01 Click **BEGIN NEW APPLICATION.**

02 Enter the Applicant’s email address.



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

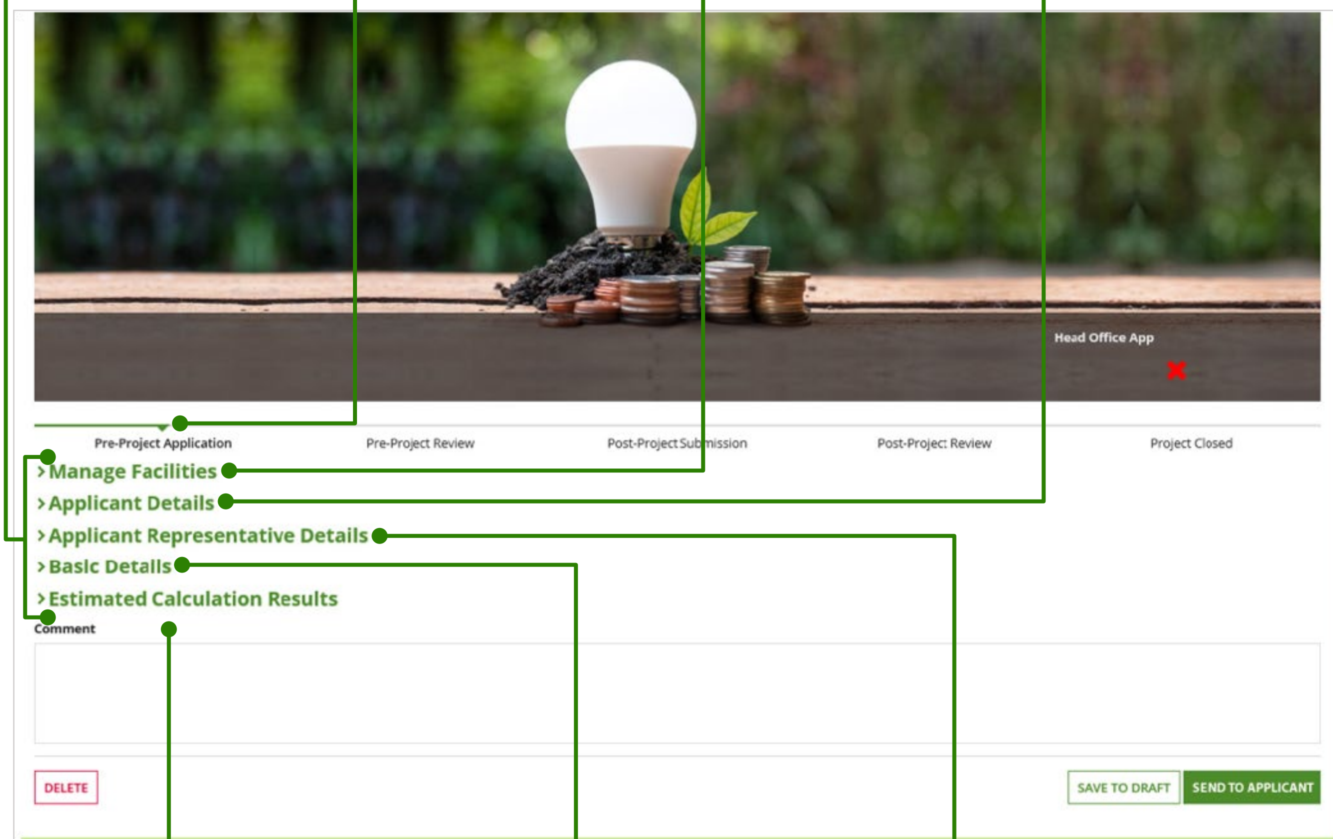
Beginning the Application (as an Applicant Representative)

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.



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.

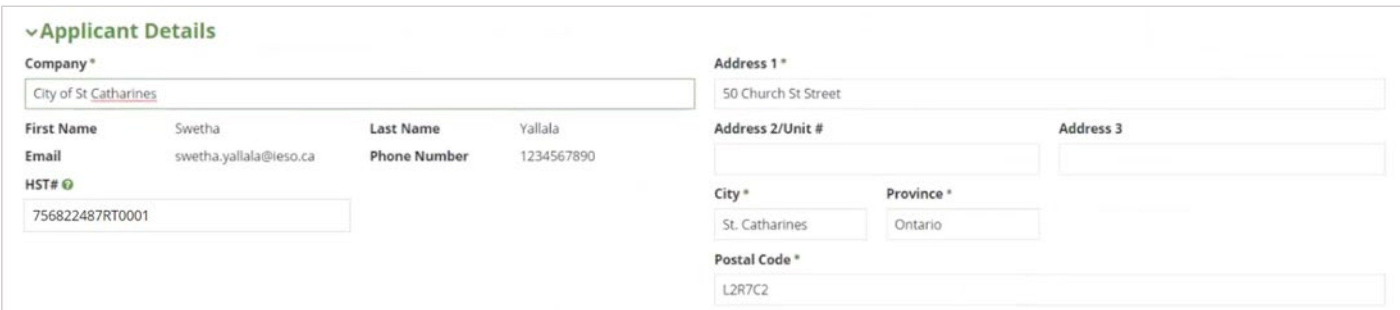
Continue to **Reviewing Applicant Details** on **p. 25**.

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.



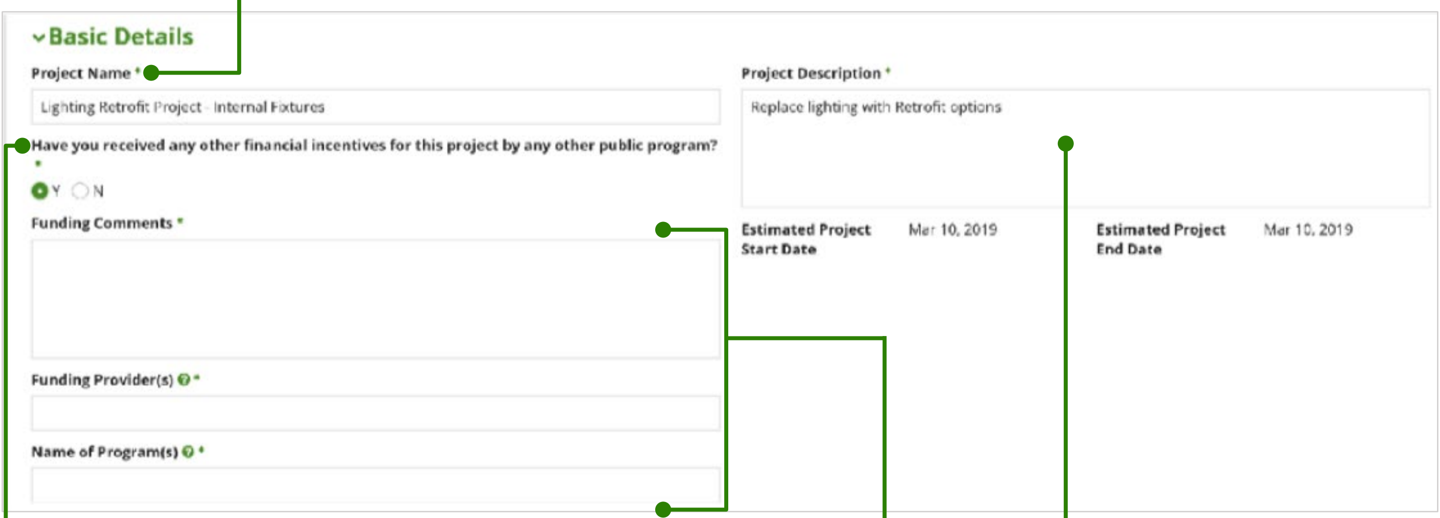
Note: If an Applicant Representative is assigned to the application, the **Applicant Representative Details** section is automatically populated. These details cannot be edited.

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.



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

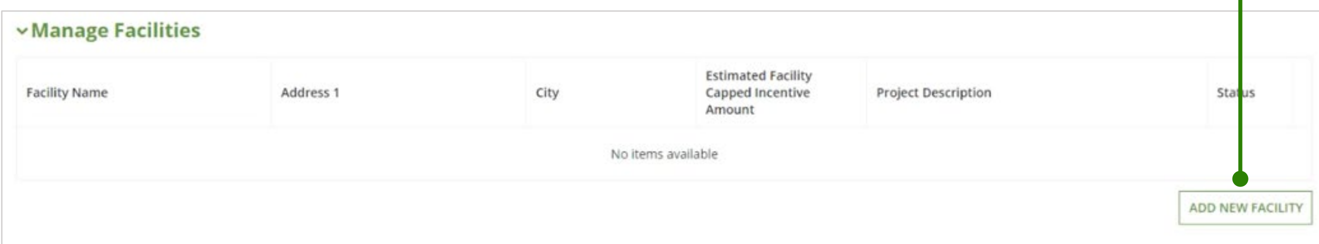
If you are receiving other financial incentives, you must provide funding information.

Enter a project description.

Creating an Application

Adding Facilities

01 Click **ADD NEW FACILITY**.

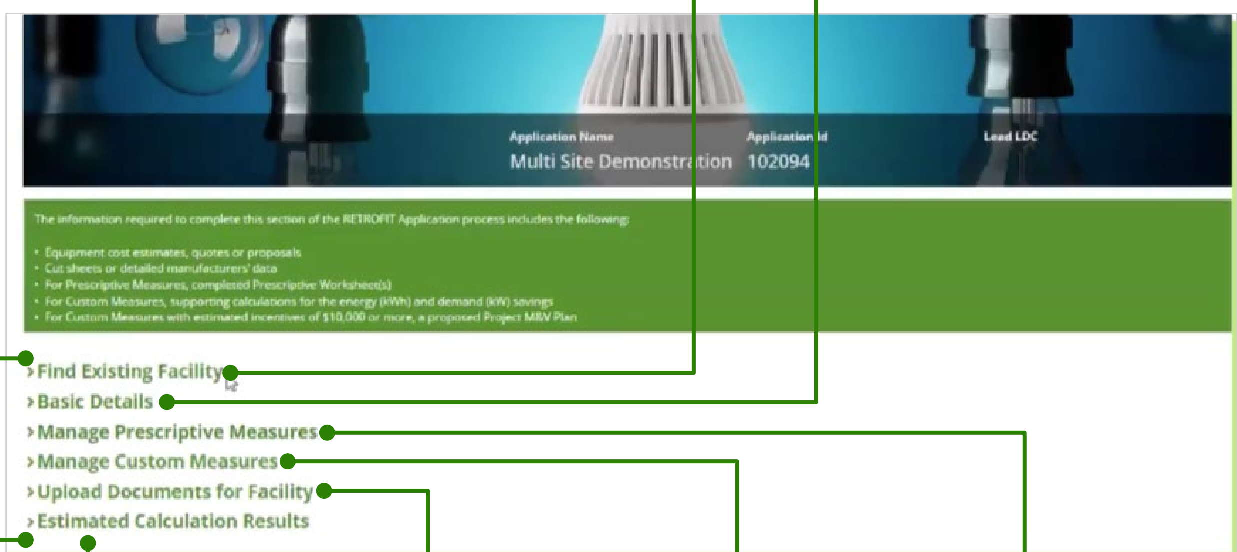


This brings you to the main page for the new facility.

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.



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

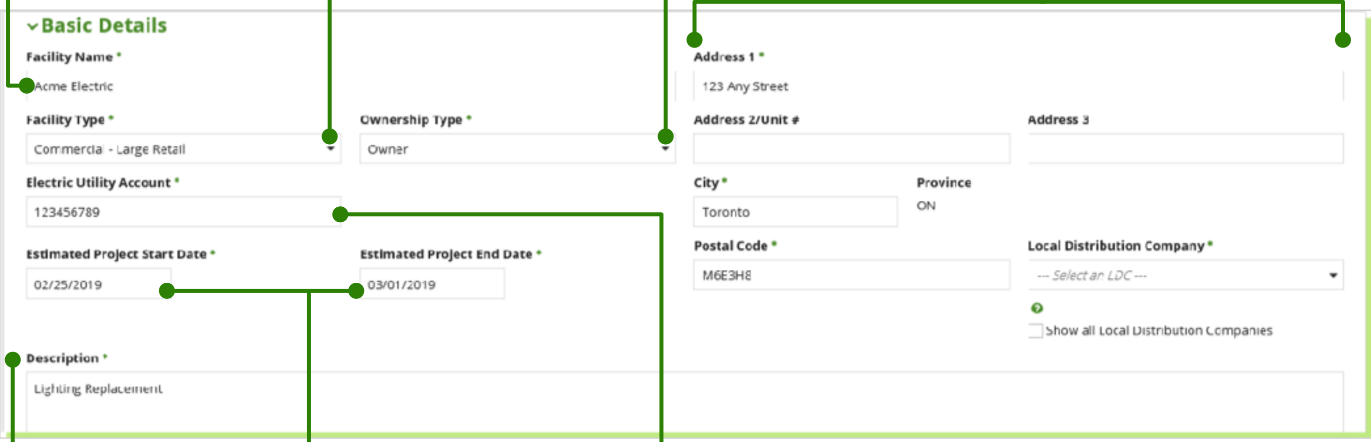
02 Complete the mandatory fields in the **Basic Details** section on the facility main page, if you're adding a new facility that has not been used in a previous application.

Enter the facility name.

Select the facility type.

Select the ownership type.

Enter the facility address, including the city, province and postal code.



Enter a project description.

Select an estimated project start and end date.

Enter the electric utility account.

SAVE ON ENERGY
POWER WHAT'S NEXT

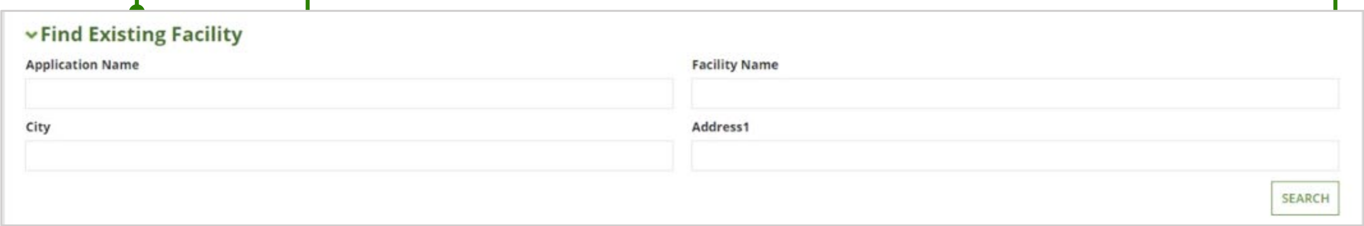
Creating an Application

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.

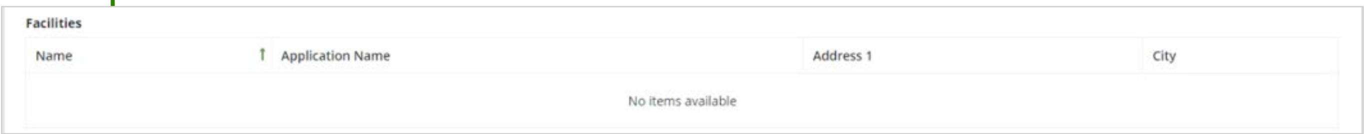
Click **Find Existing Facility.**

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

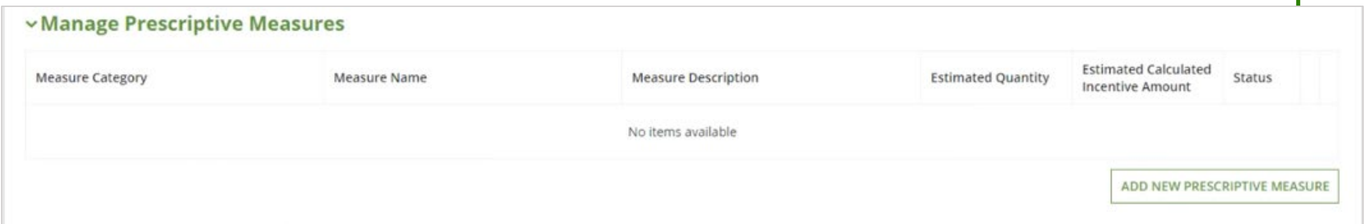


Click **SEARCH.**

Select the facility from the facilities list**.**



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



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.

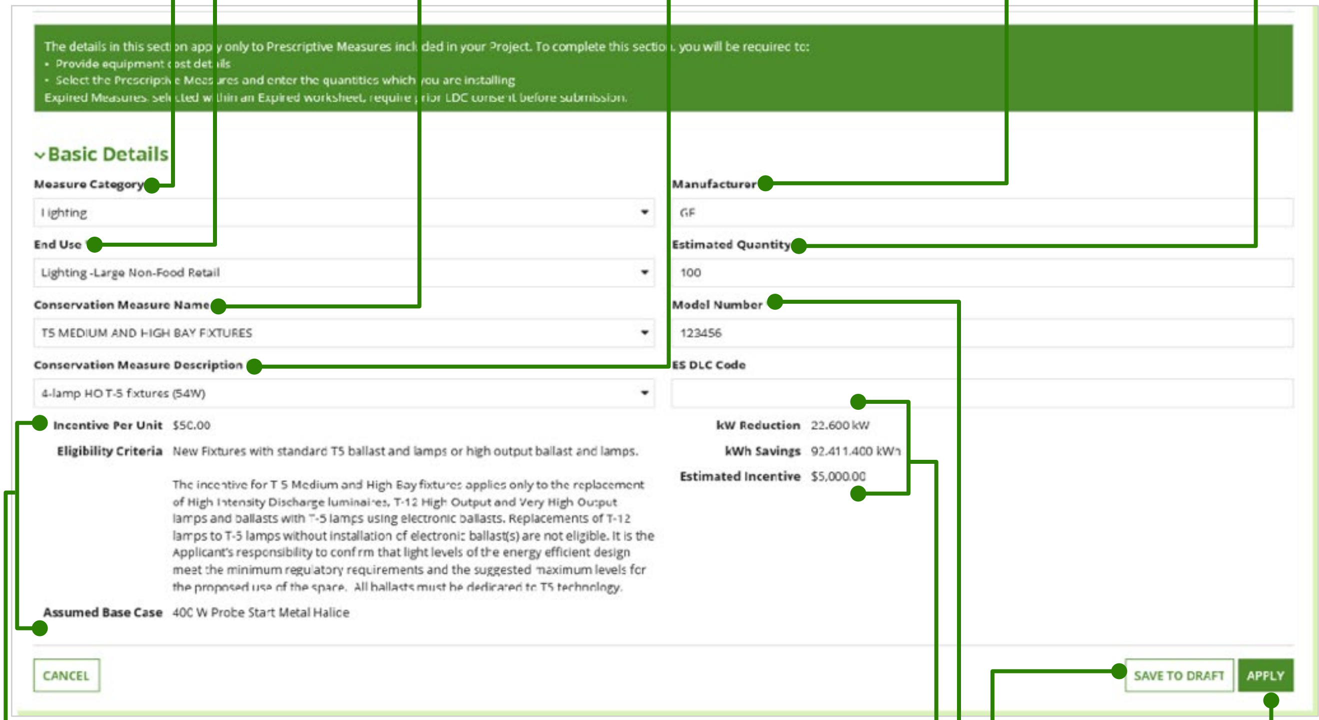
Select the end use.

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.

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 ambiant 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

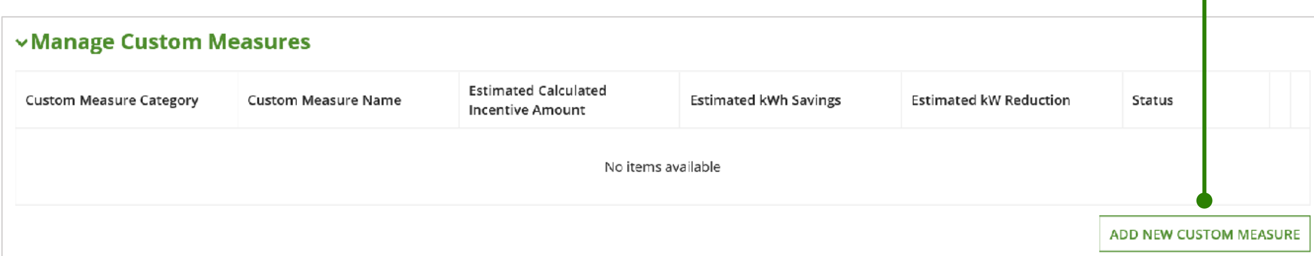
Adding Facilities

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

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

08 Click **RECALCULATE**.

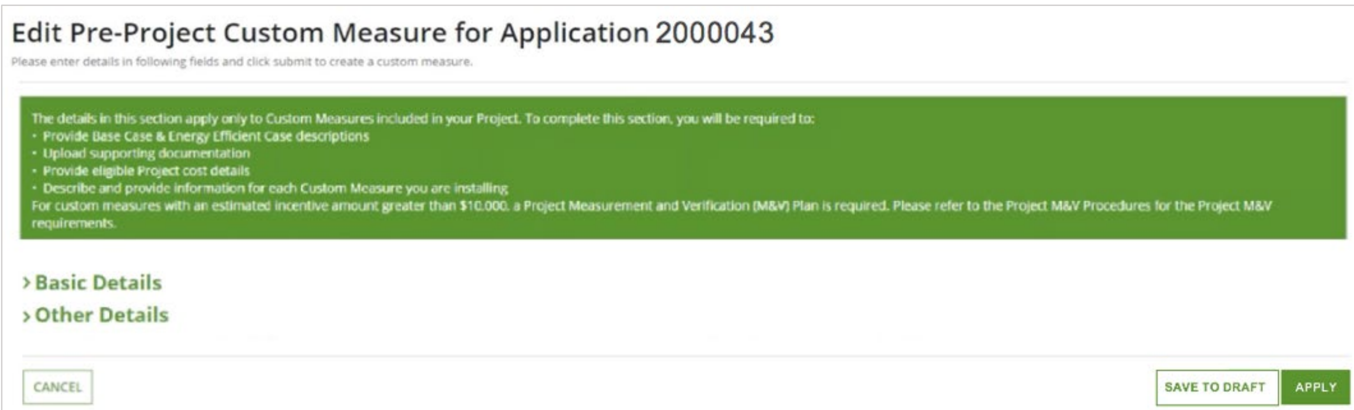
09 Click **ADD NEW CUSTOM MEASURE**, if you want to include custom measures (this is not a requirement). If not, continue to **step 14.**



This opens a new custom measure to be completed.

Creating an Application

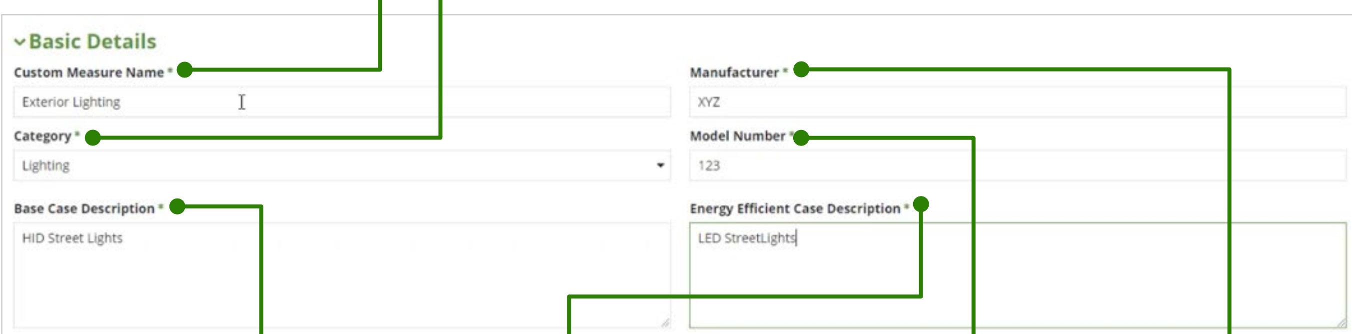
Adding Facilities



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

Enter the measure name.

Select the measure category.



Enter the base case description.

Enter the energy efficient case description.

Enter the model number.

Enter the manufacturer.

Creating an Application

Adding Facilities

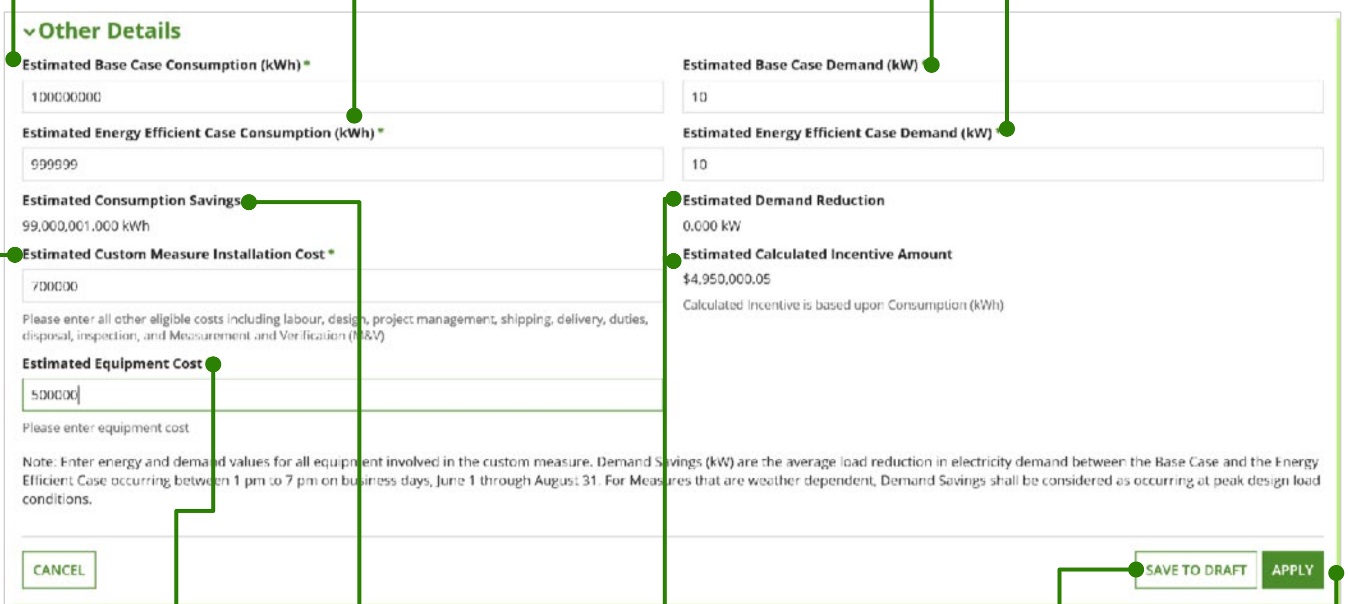
11 Complete the mandatory fields in the **Other Details** section for the custom measure.

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.

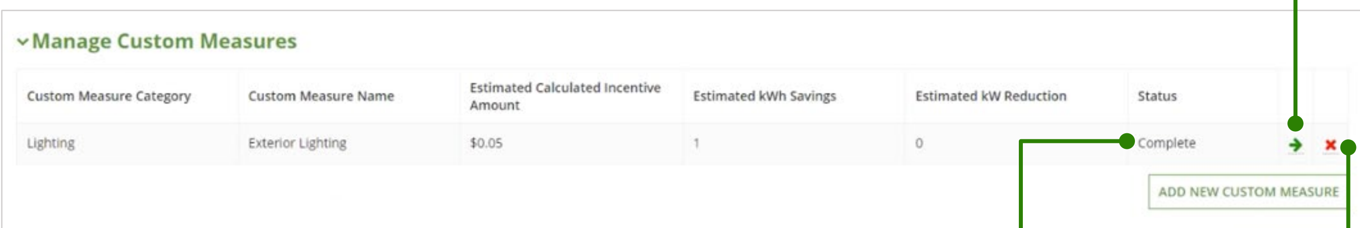
12 Click **APPLY** to add the measure to the facility.

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.



The measure status is **complete**.

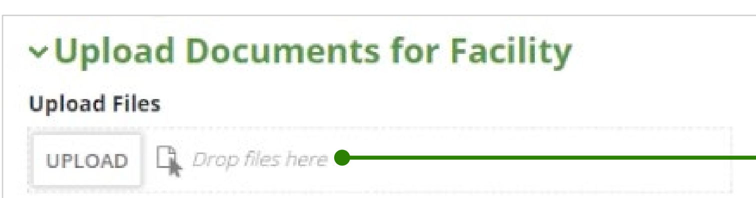
Click here to delete the measure.

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.**



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.

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

CANCEL DELETE DUPLICATE FACILITY SAVE TO DRAFT APPLY

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	190,413.600	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

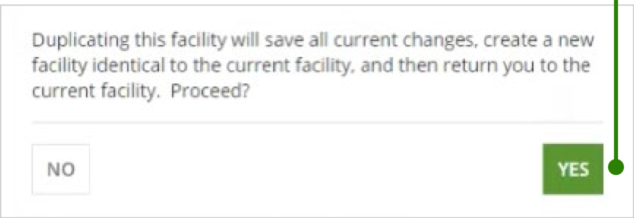
CANCEL DELETE DUPLICATE FACILITY SAVE TO DRAFT APPLY

Creating an Application

Adding Facilities

Duplicating a Facility

03 Click **YES**.

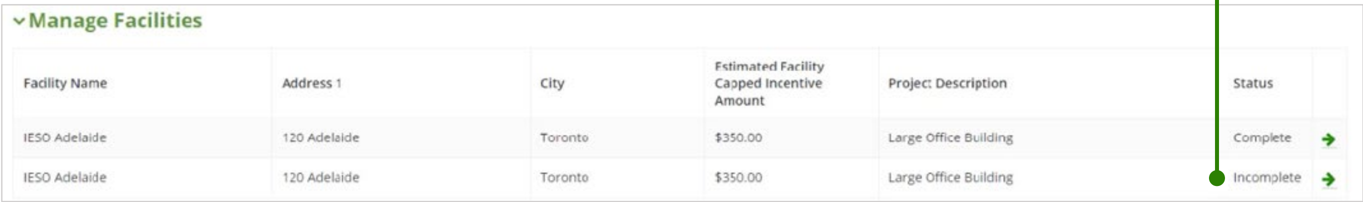


This creates a new facility that is identical to the existing facility.

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	

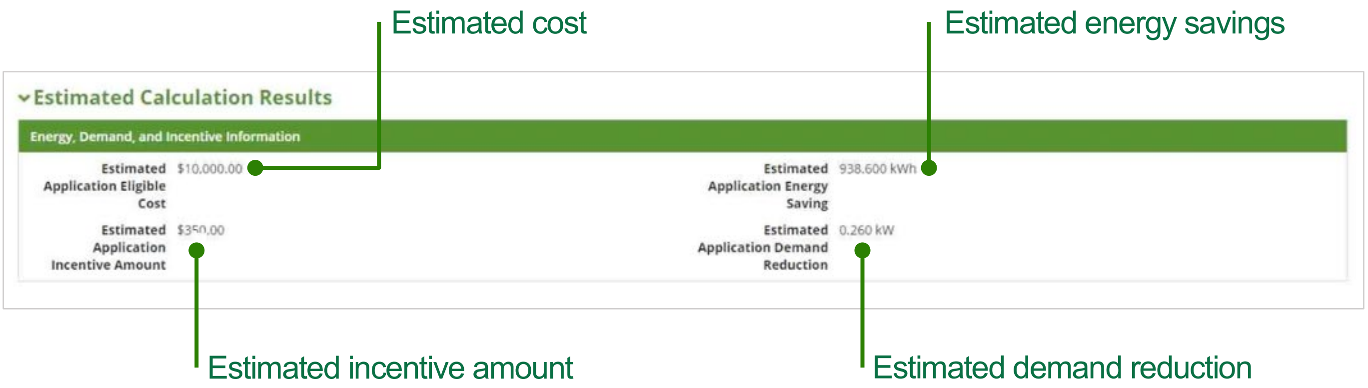
Note: If you do not refresh the page, the duplicated facility will not appear in the application facility list.

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.

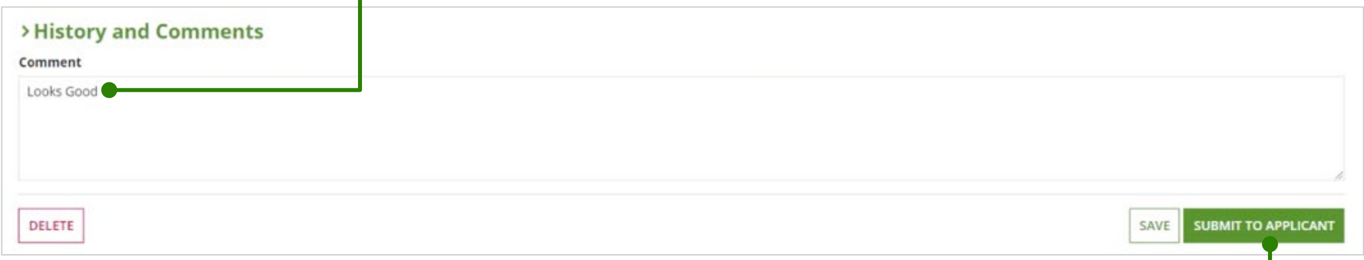
If you're an **Applicant**, continue to **Submitting the Application** on **p. 43**.

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.



02 Click **SUBMIT TO APPLICANT.**

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

Creating an Application

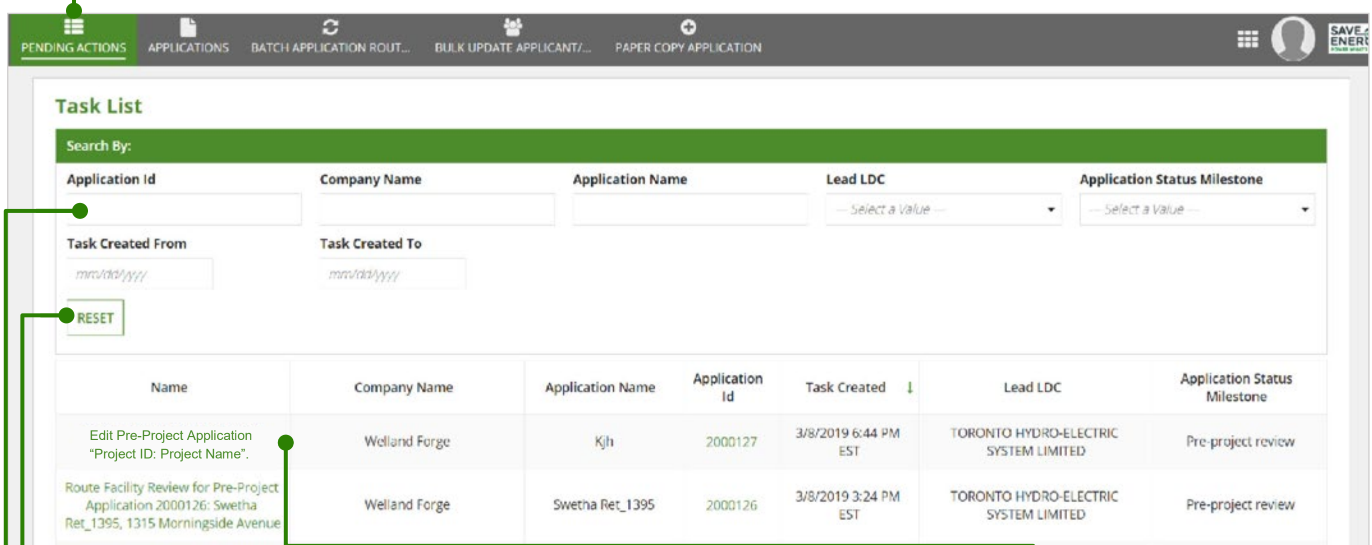
Submitting the Application

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**.



02 Enter the application ID.

03 Click **RESET**.

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

Creating an Application

Submitting the Application

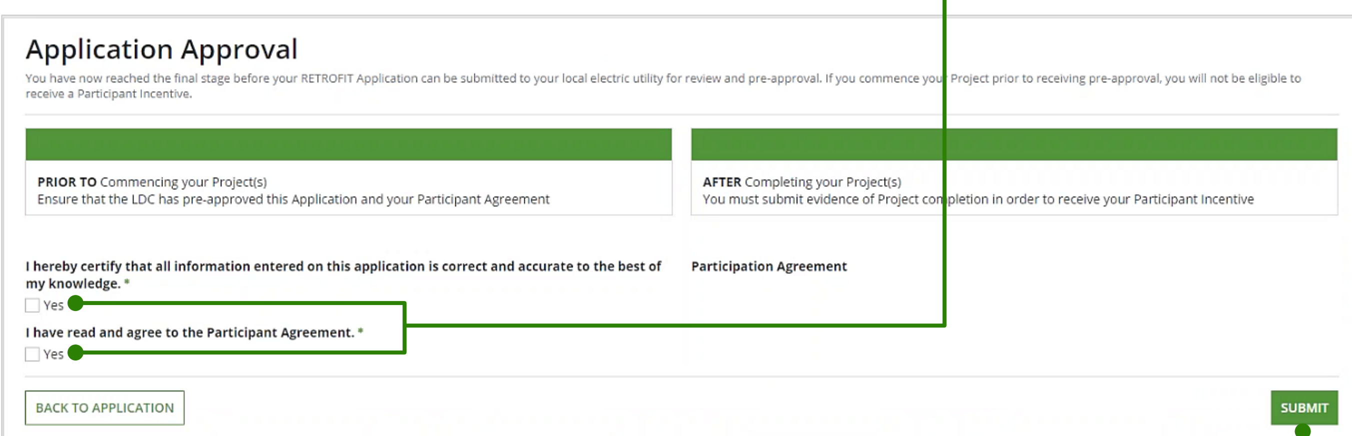
05 Review all components of the application and make any edits as required.

06 Enter a comment.

07 Click **SUBMIT.**

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.

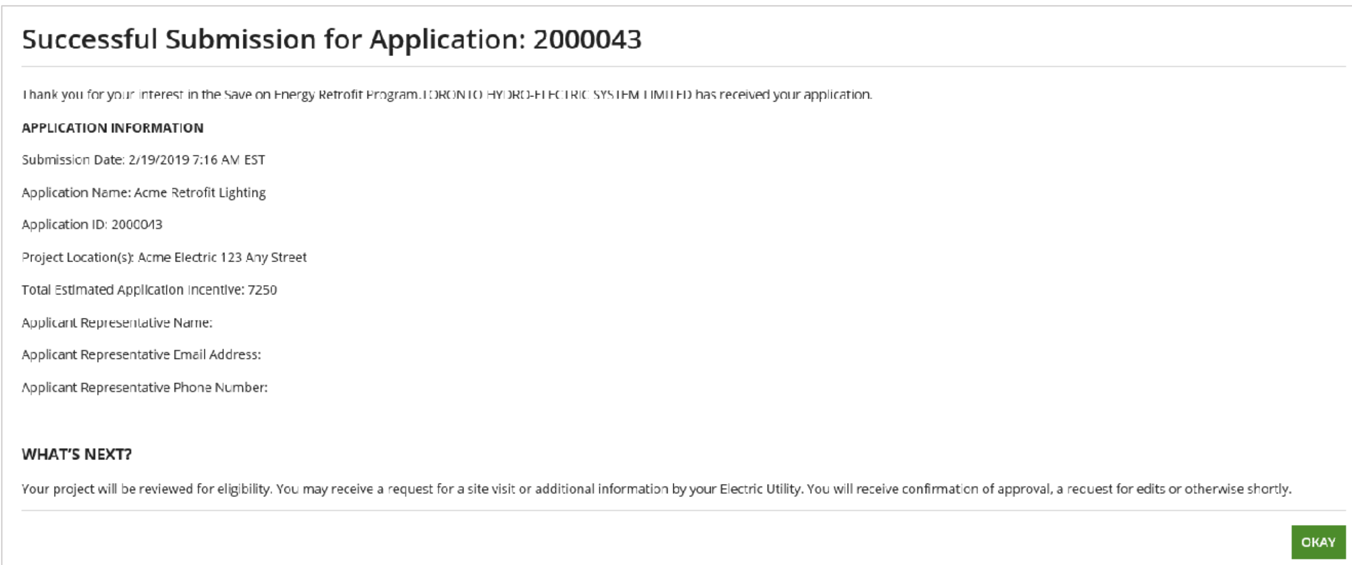


09 Click **SUBMIT.**

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.

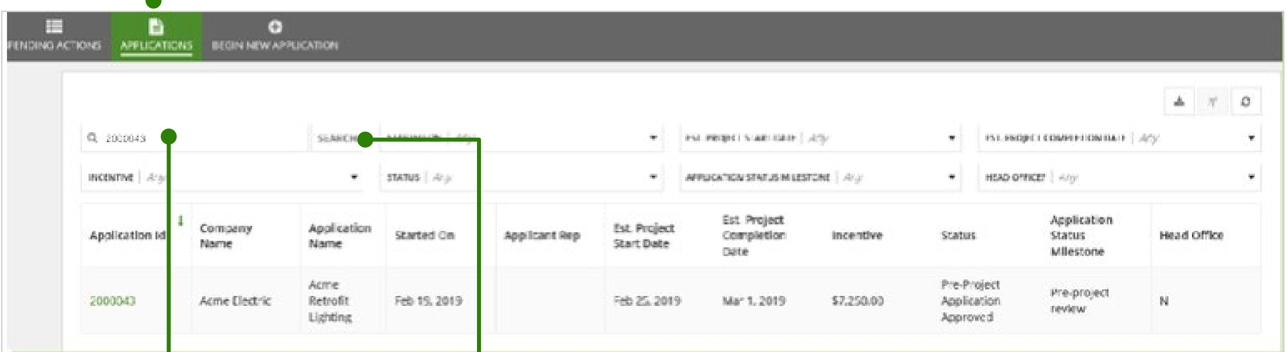
Upon completion of the project, the Applicant will:

- 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.**



02 Enter the application ID.

03 Click **SEARCH.**

04 Click the application ID.

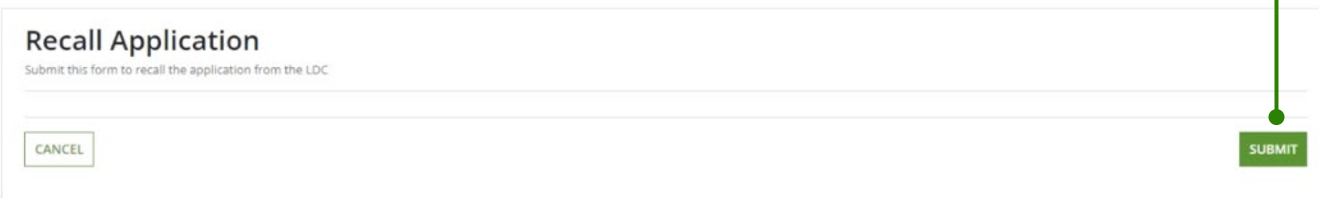
Application Id	Company Name	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	Application Status Milestone	Head Office
2000043	Acme Electric	Acme Retrofit Lighting	Feb 19, 2019		Feb 25, 2019	Mar 1, 2019	$7,250.00	Pre-Project Application Approved	Pre-project review	N

05 Click **Related Actions.**

06 Click **Recall Application.**

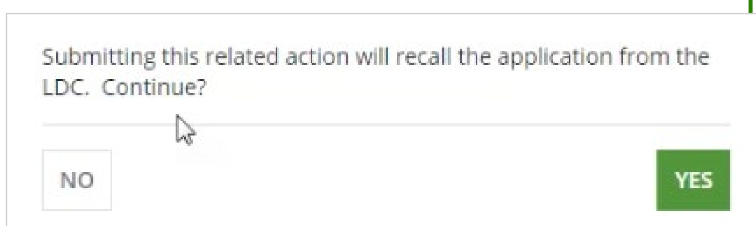
Recalling an Application

07 Click **SUBMIT.**



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

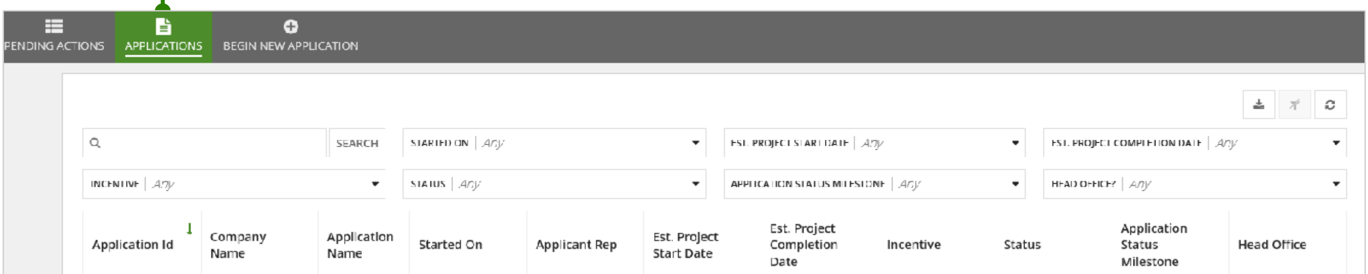
SAVE ON ENERGY™
POWER WHAT'S NEXT

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.

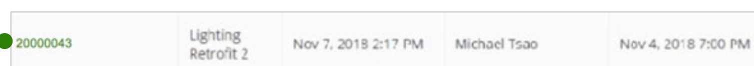
01 Click **APPLICATIONS**.



02 Enter the application ID.

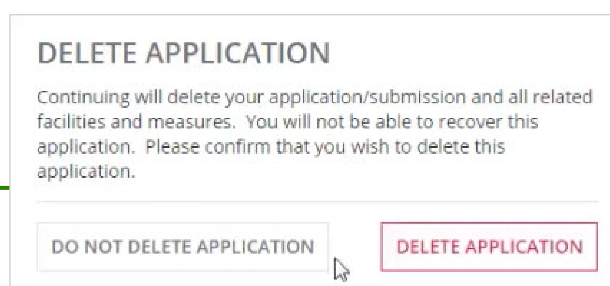
03 Click **SEARCH**.

04 Click the application ID.



05 Click **DELETE**.

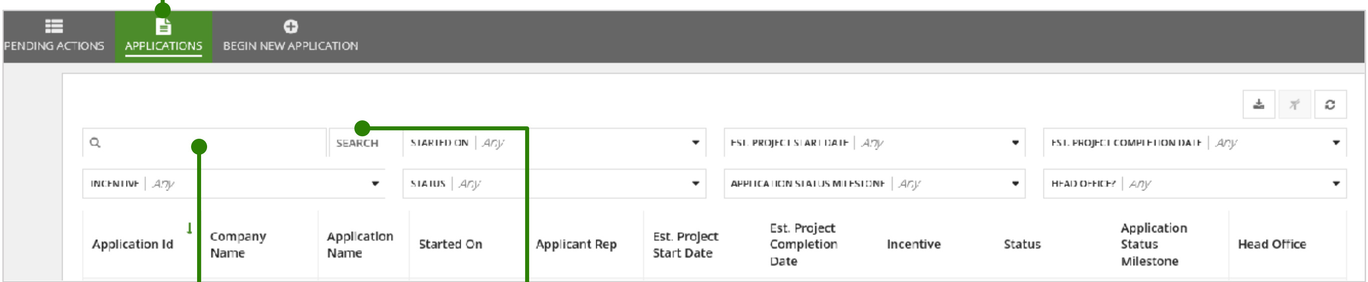
06 Click **DELETE APPLICATION**.



Copying an Application

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

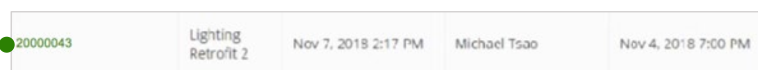
01 Click **APPLICATIONS**.



02 Enter the application ID.

03 Click **SEARCH**.

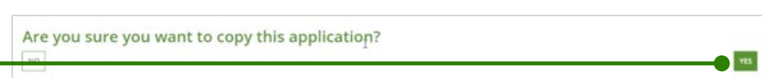
04 Click the application ID.



05 Click **Related Actions.**

06 Click **Copy Application.**

07 Click **YES**.



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

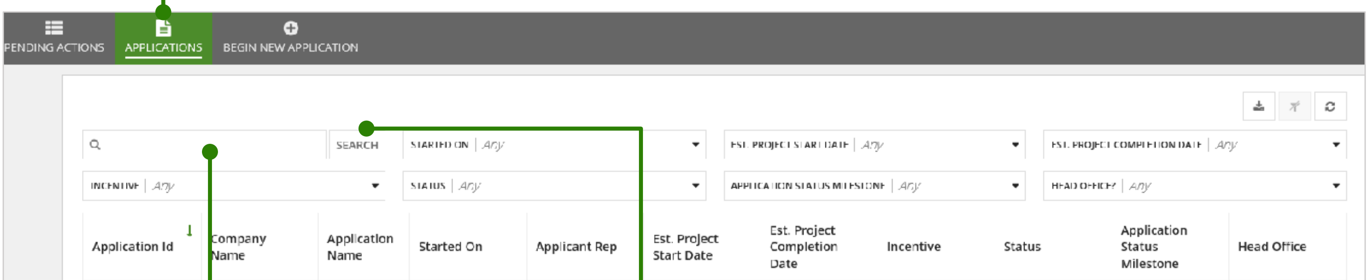
Note: The application that is being copied remains unchanged.

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**.

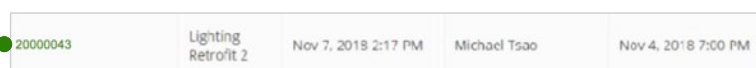
01 Click **APPLICATIONS**.



02 Enter the application ID.

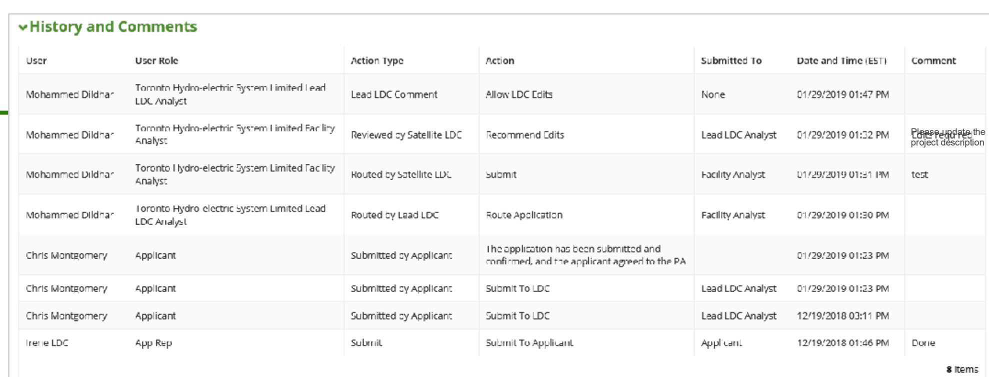
03 Click **SEARCH**.

04 Click the application ID.



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	Please update the 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	
Irene LDC	App Rep	Submit	Submit To Applicant	Applicant	12/19/2018 01:46 PM	Done

8 items

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

Responding to Save on Energy Analyst Edit Requests

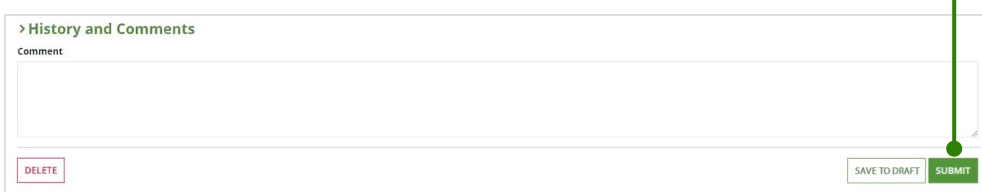
Editing an Application

06 Click **EDIT RETURNED APPLICATION**.

07 Make the required edits to the application.

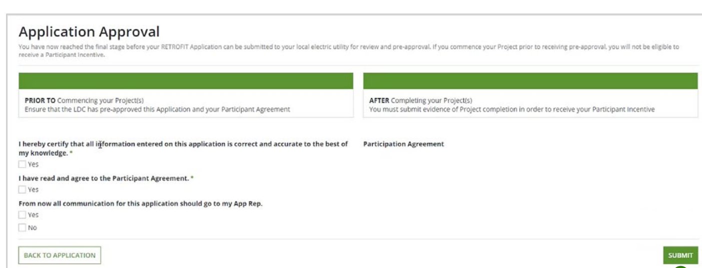
08 Enter a comment.

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**.



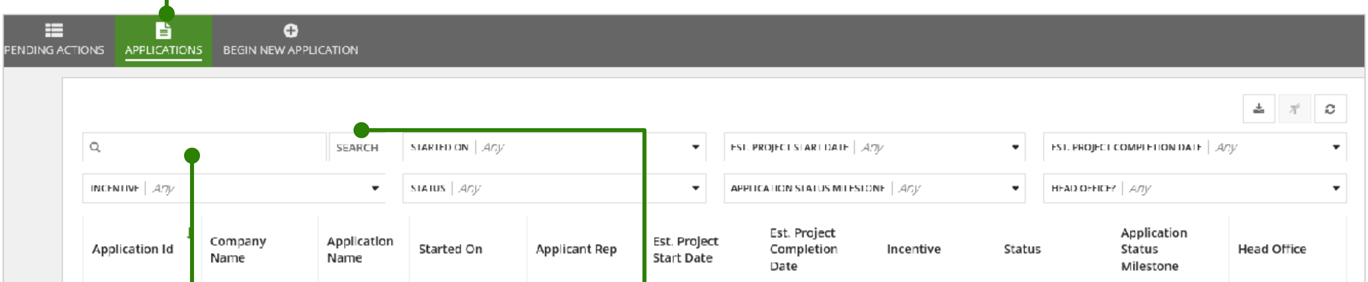
The application will now be forwarded to the Save on Energy Analyst for review.

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).

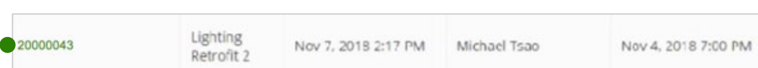
01 Click **APPLICATIONS**.



02 Click the application ID.

03 Click **SEARCH**.

04 Click the application ID.



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

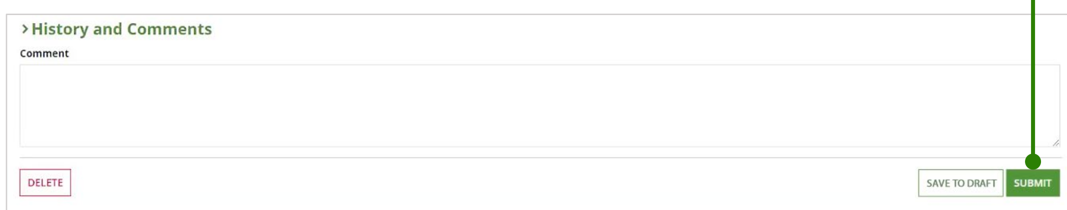
06 Review the changes made by the Save on Energy Analyst.

Responding to Save on Energy Analyst Edit Requests

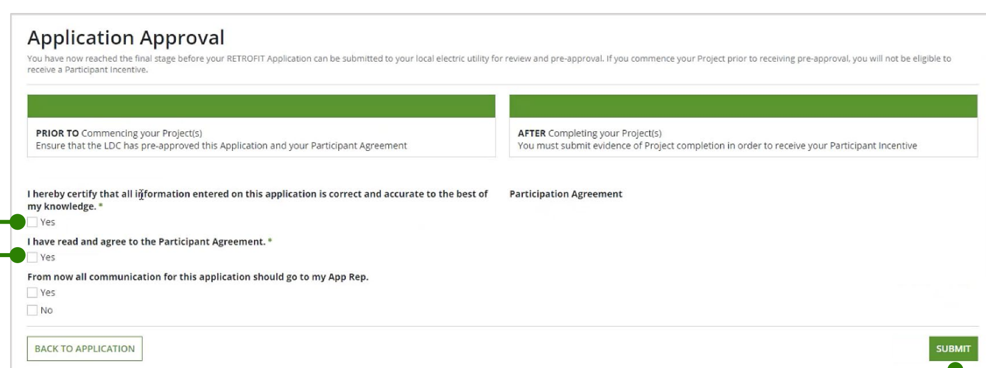
Approving an Edited Application

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.

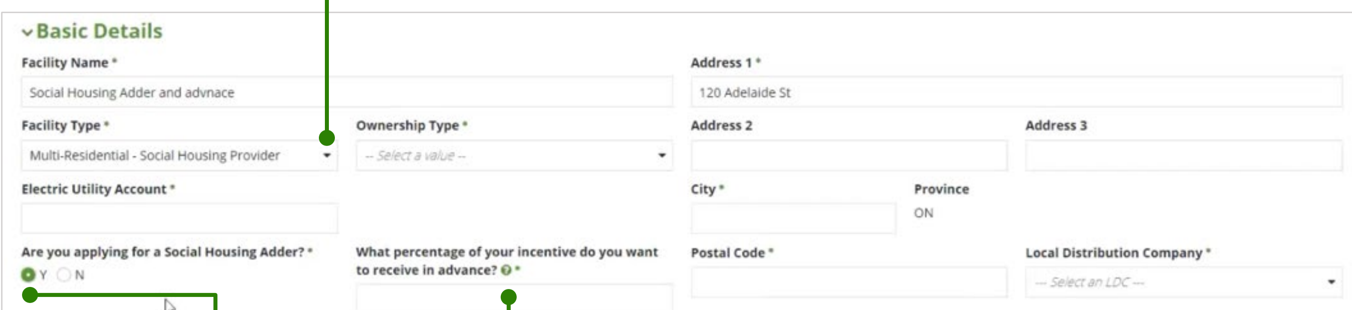
Submitting an Advance Incentive Request

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.



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**).

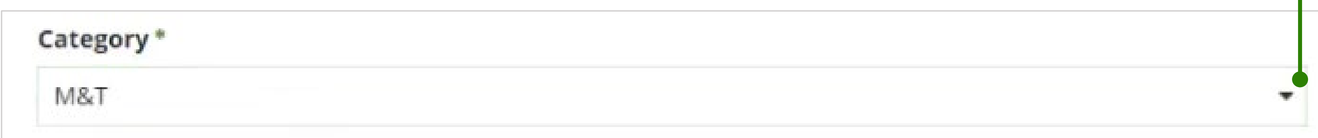
The application will now include the request for a social housing advance incentive.

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.

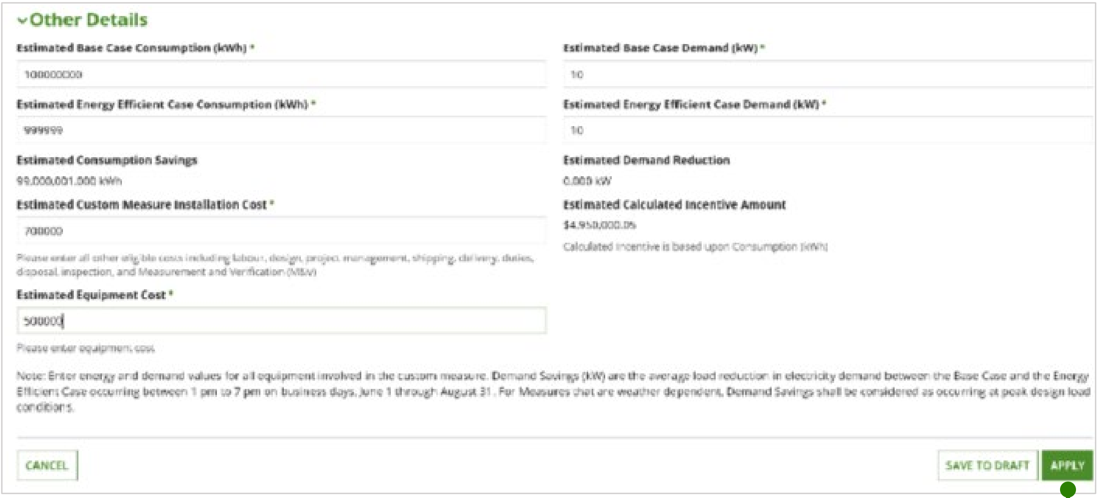


02 Select **Yes**.

Submitting an Advance Incentive Request

Applying for a Monitoring and Targeting Incentive

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



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.

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

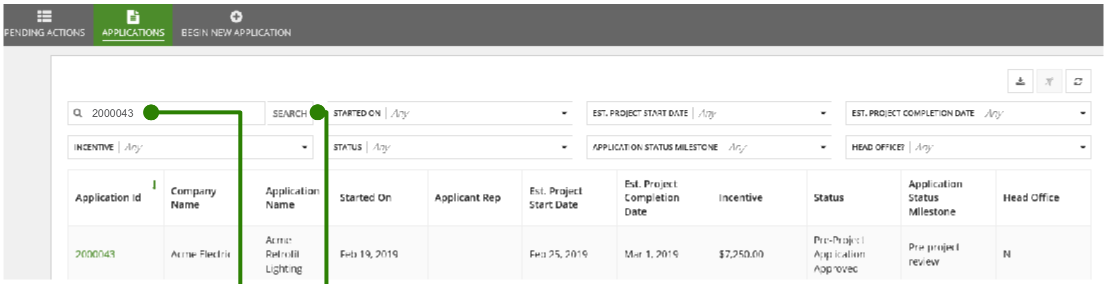
The application will now include the request for an M&T advance incentive.

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**.



02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

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

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

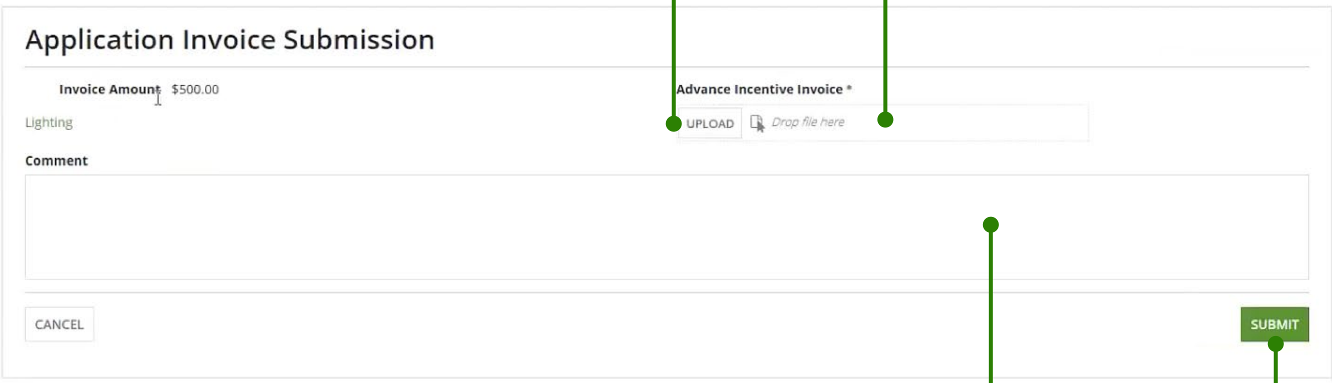
SAVE ON ENERGY
POWER WHAT'S NEXT

Submitting an Advance Incentive Invoice

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

07 Click **UPLOAD**.

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



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

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

10 Click **SUBMIT**.

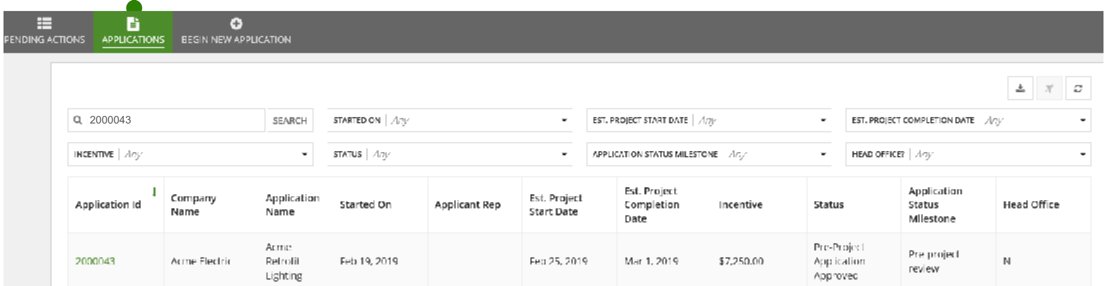
The Save on Energy Analyst will now receive a notification to review the advance incentive invoice.

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**.



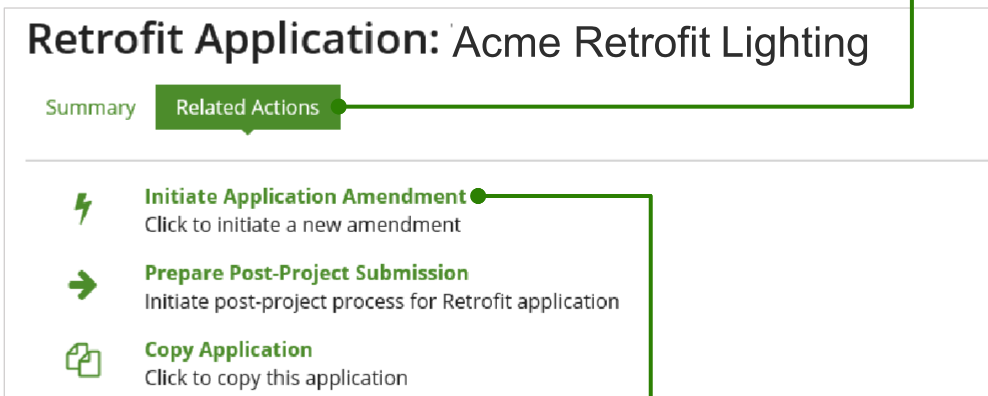
02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

Amending an Approved Application

05 Click **Related Actions**.



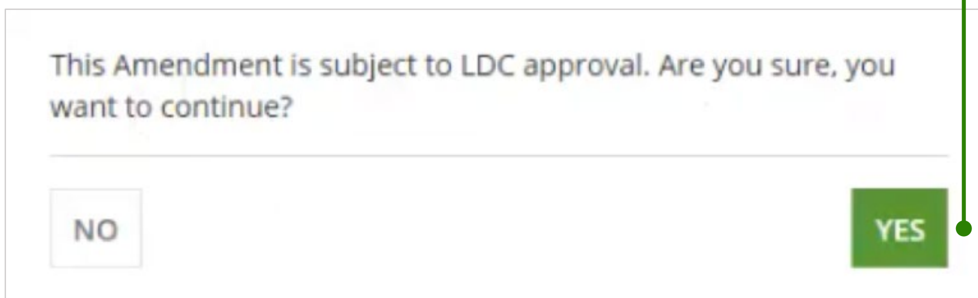
06 Click **Initiate Application Amendment.**

07 Enter the reason for the amendment.

08 Click **INITIATE**.

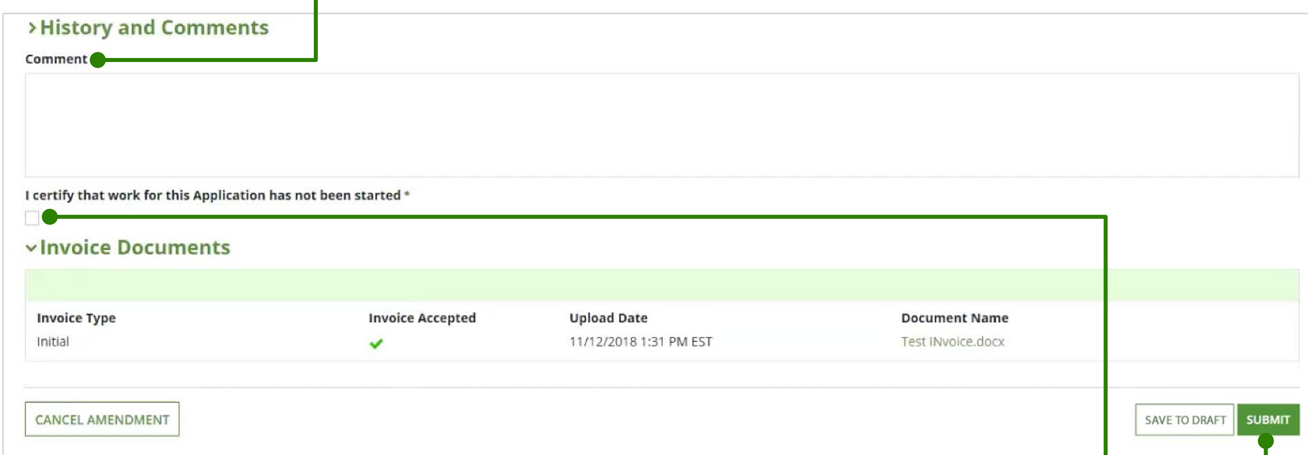
Amending an Approved Application

09 Click **YES**.



10 Make any required changes to the application.

11 Enter a comment.



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

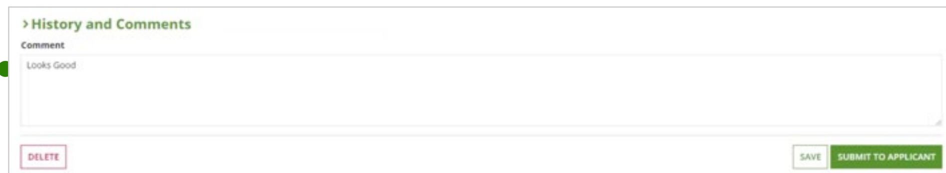
13 Click **SUBMIT**.

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.

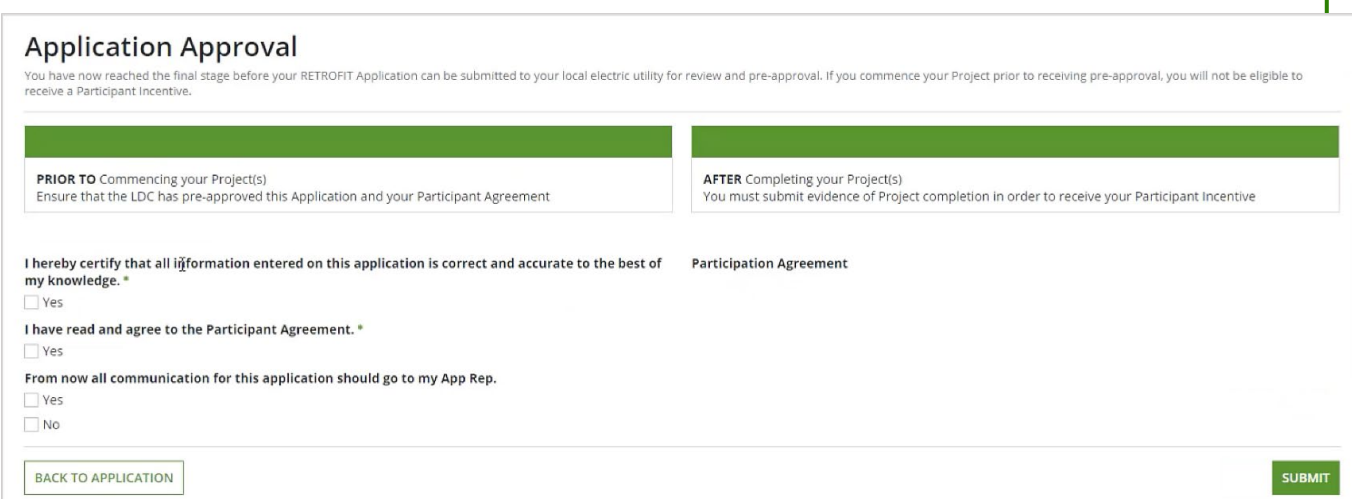
Enter a comment if required.

Click **SUBMIT TO APPLICANT.**



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.



15 Click **SUBMIT**.

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

Post-Project Submissions

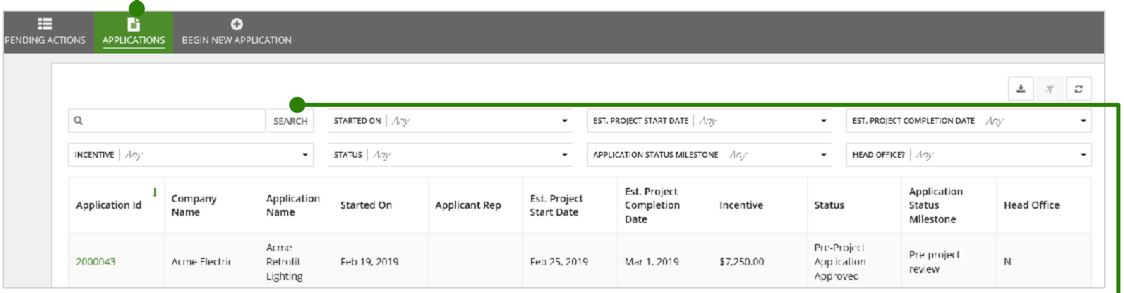
SAVE ON ENERGY
POWER WHAT'S NEXT

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".

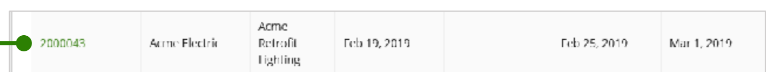
Beginning the Post-Project Submission

01 Click **APPLICATIONS**.

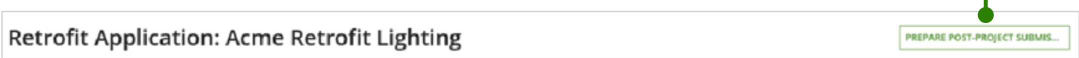


02 Enter any application information in the search field (e.g., application ID or name) and click **SEARCH** to find the application.

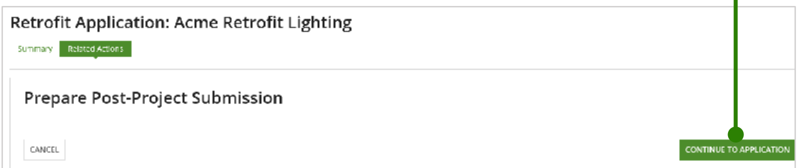
03 Click the application ID.



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



05 Click **CONTINUE TO APPLICATION.**

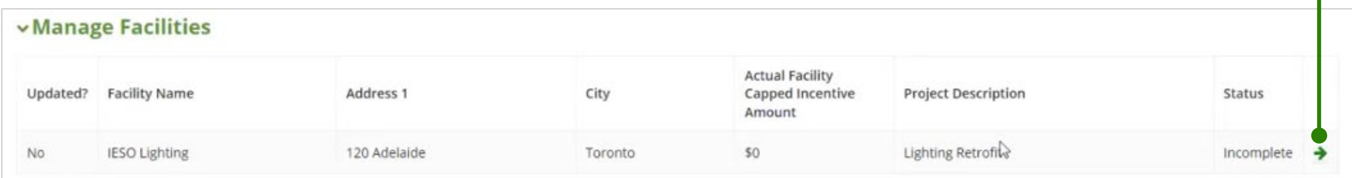


This step creates a new post-project submission to be completed and brings you to the post-project submission main page.

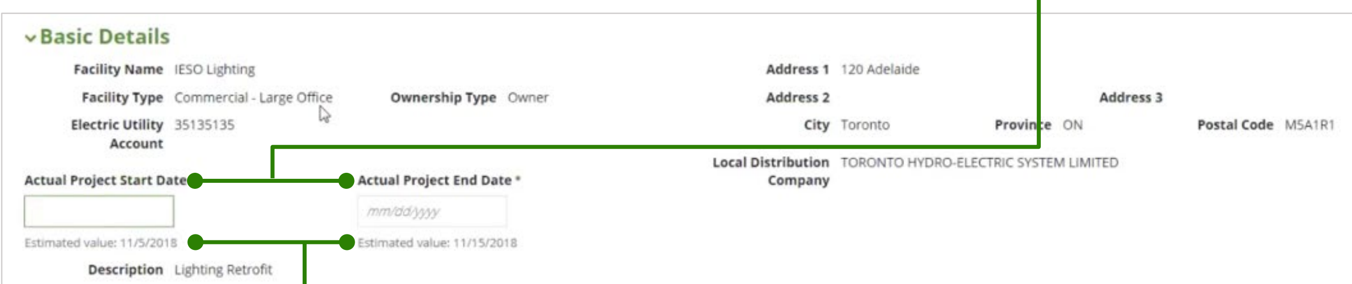
Creating a Post-Project Submission

Entering Project Data

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



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



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.

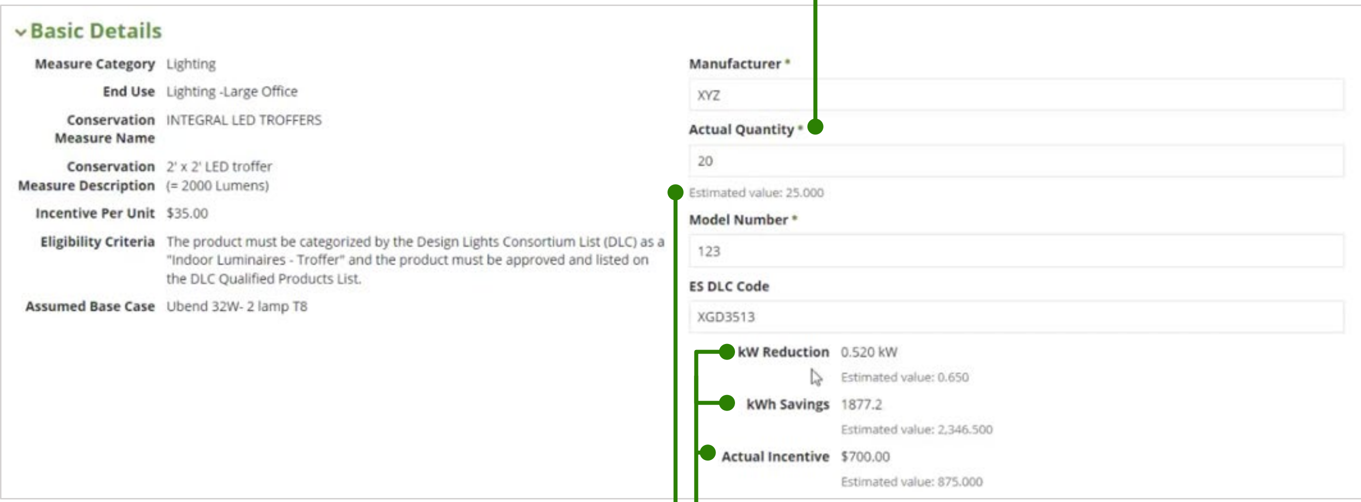
Creating a Post-Project Submission

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**.

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

05 Update any other mandatory fields as required.



The estimated value from the application is provided.

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

Creating a Post-Project Submission

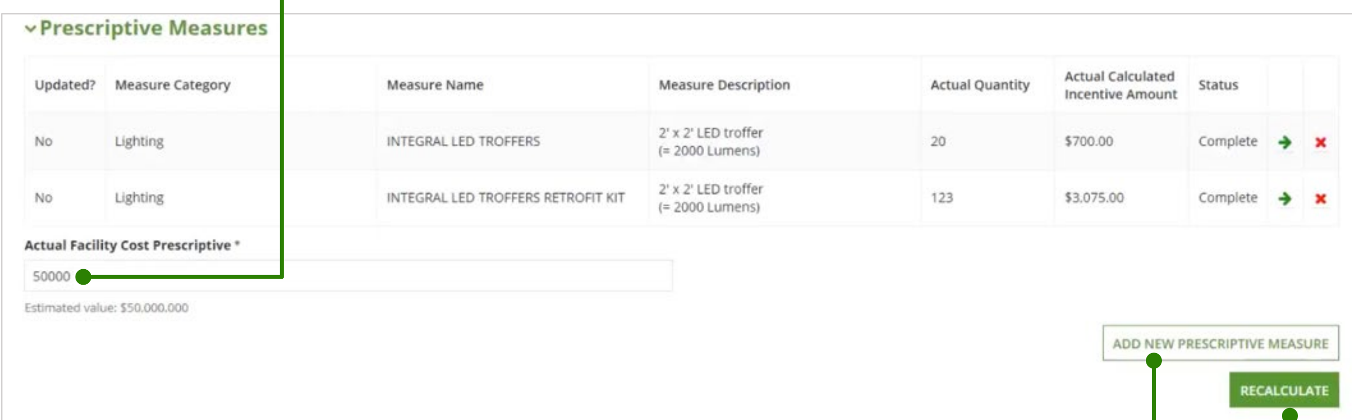
Entering Project Data

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.



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)	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: $50,000.000

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**.

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Creating a Post-Project Submission

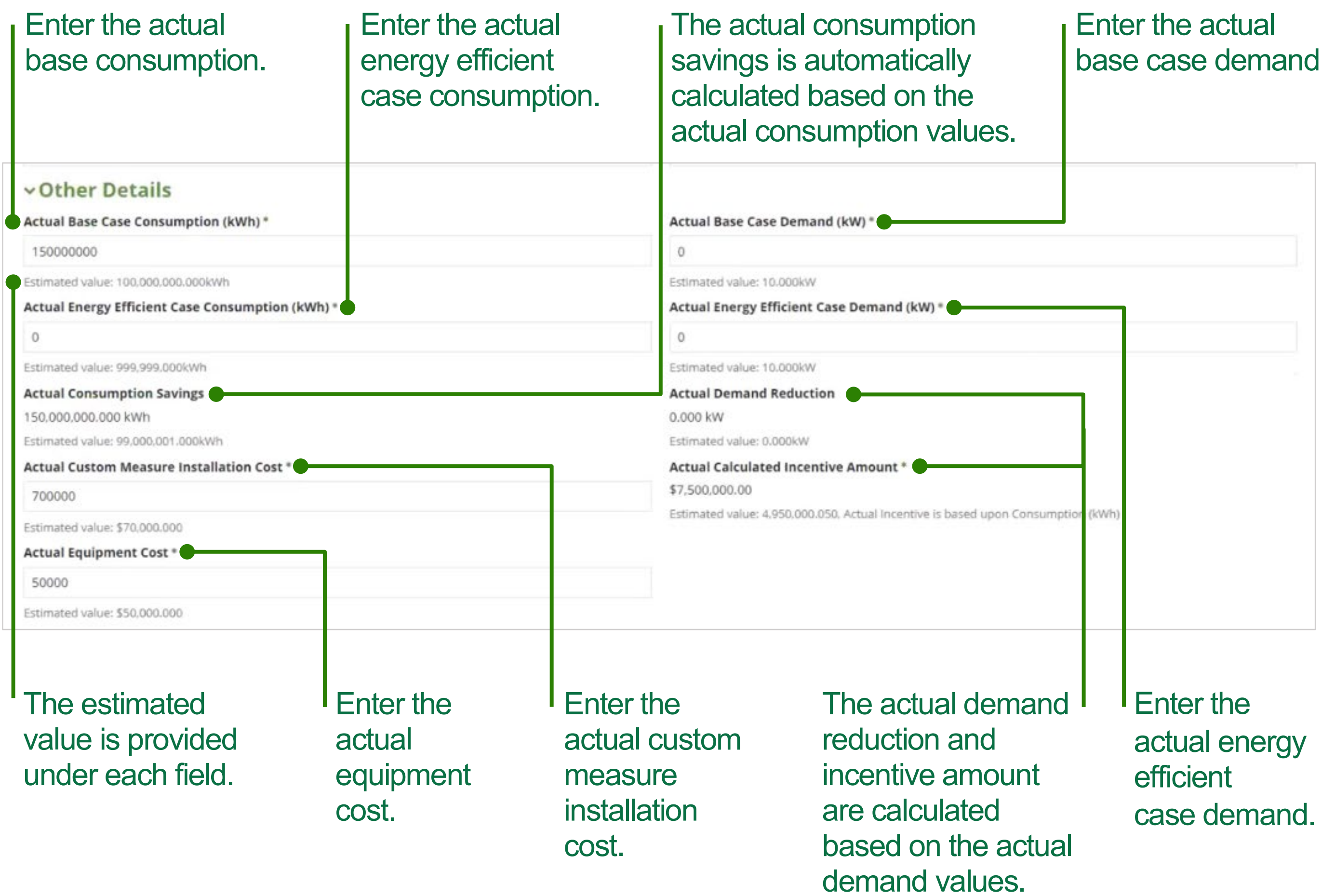
Entering Project Data

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.



Creating a Post-Project Submission

Entering Project Data

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

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.

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.

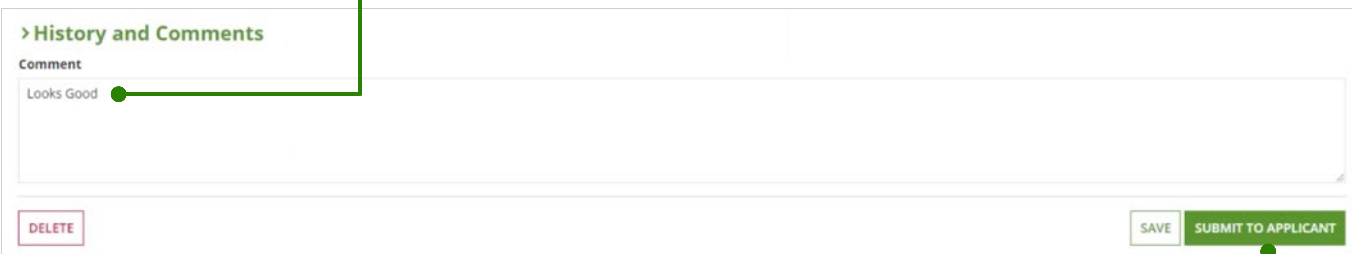
If you're an **Applicant Representative,** you must forward the post-project submission to the Applicant. Continue to **Forwarding the Post-Project Submission to the Applicant** on **p. 73**.

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.



02 Click **SUBMIT TO APPLICANT**.

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

Creating a Post-Project Submission

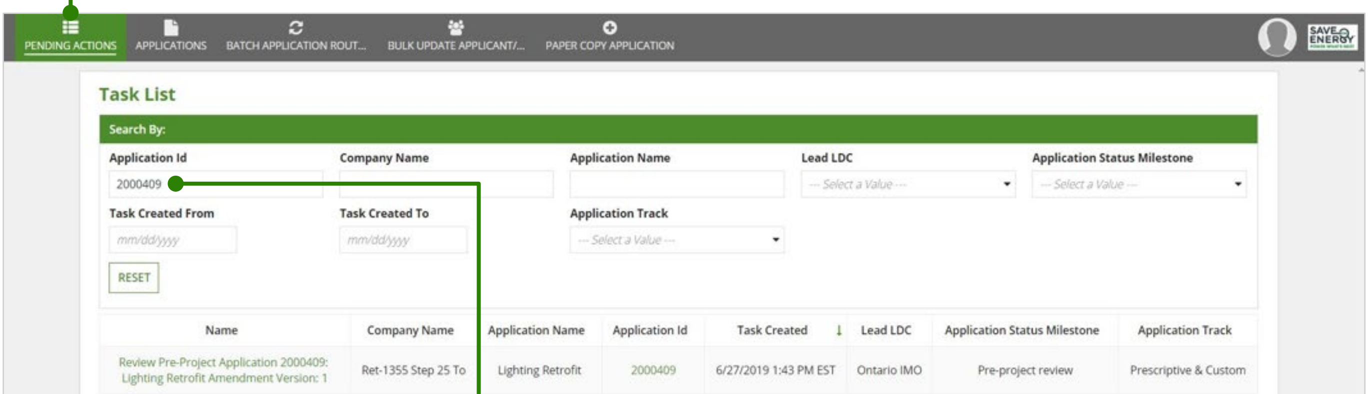
Submitting the Post-Project Submission

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.**



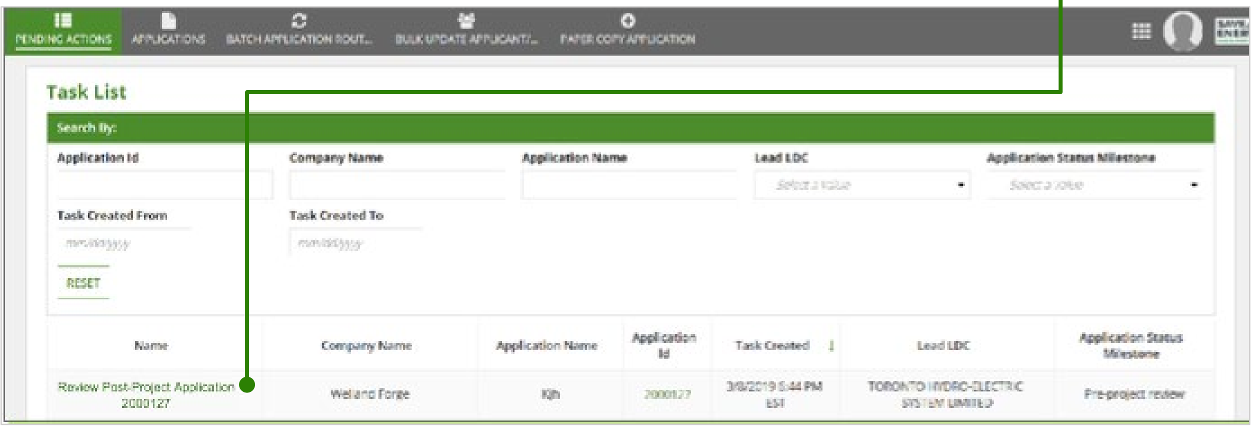
02 Enter the application ID.

03 Click **RESET**.

Creating a Post-Project Submission

Submitting the Post-Project Submission

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



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

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

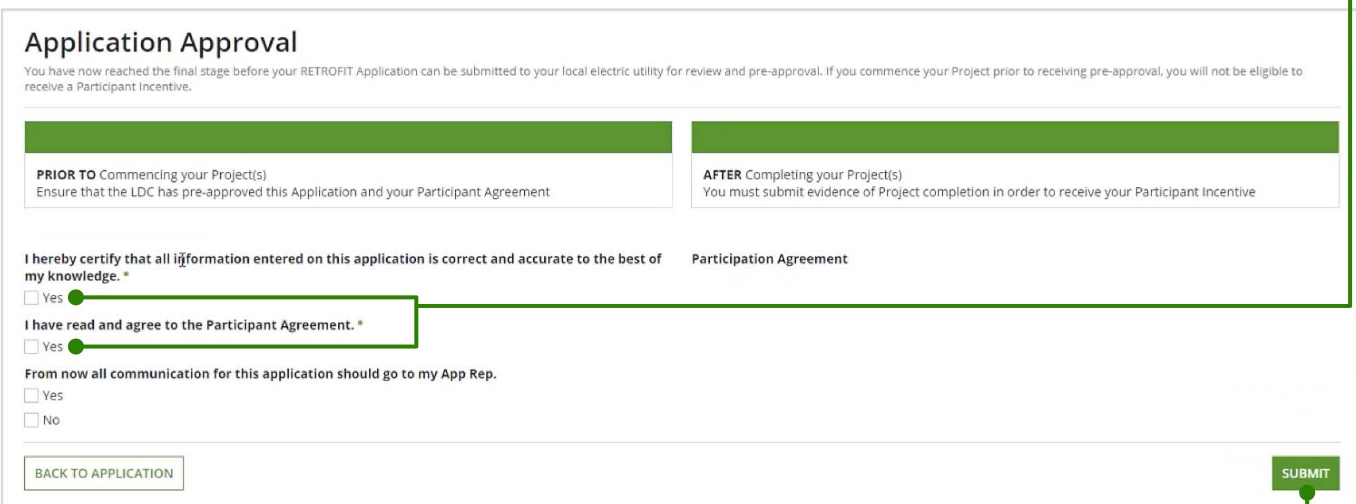
If the post-project submission was completed by an Applicant Representative, you can click **SEND TO APP REP** to return it to them, if required.

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.



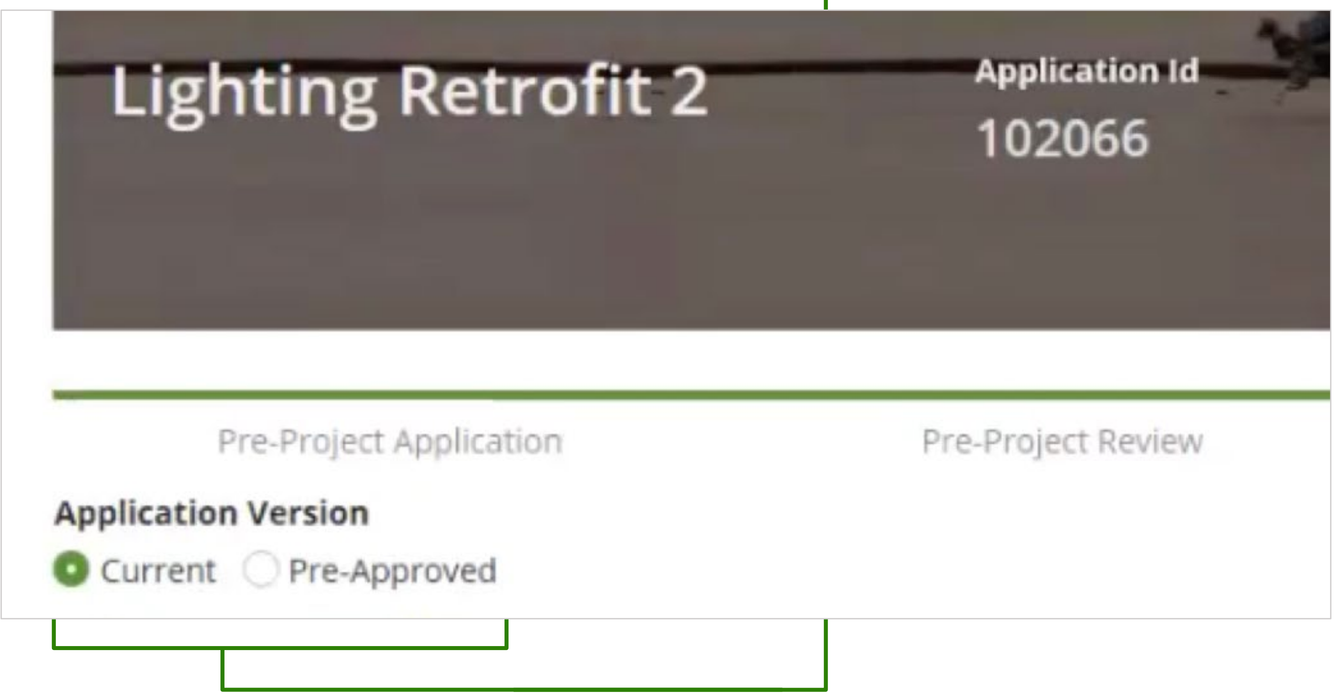
09 Click **SUBMIT**.

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.

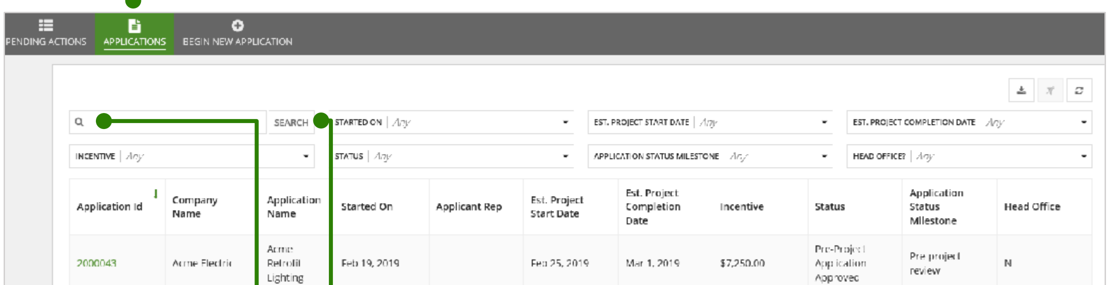


Submitting an Invoice

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**.

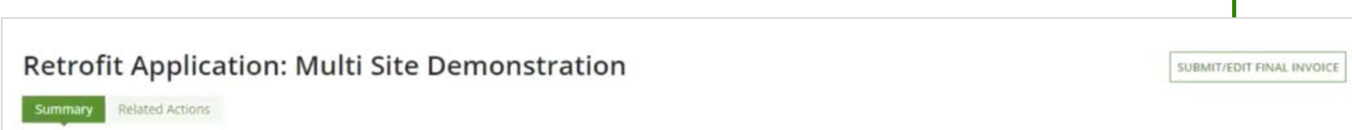


02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

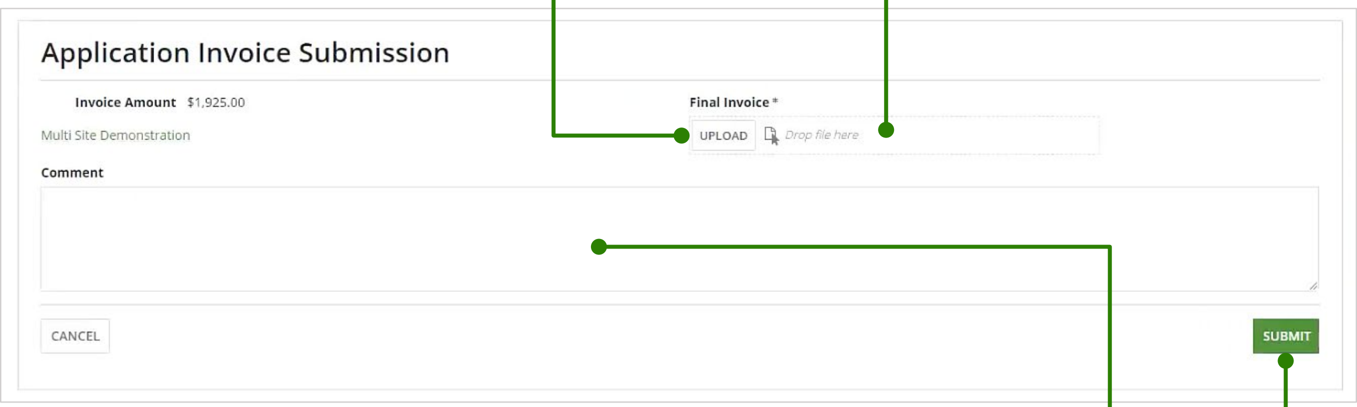
05 Click **SUBMIT/EDIT FINAL INVOICE.**



Submitting an Invoice

06 Click **UPLOAD**.

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



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.

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