



RETROFIT PROGRAM

DIGITAL USER GUIDE:
FOR APPLICANTS AND APPLICANT REPRESENTATIVES

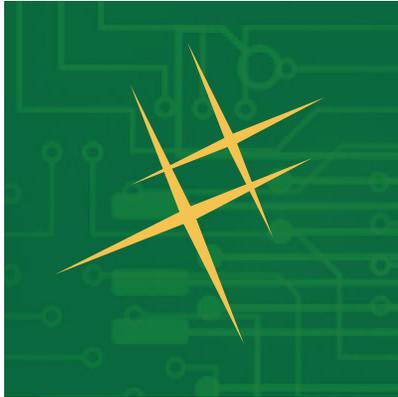
January 2020

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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**.



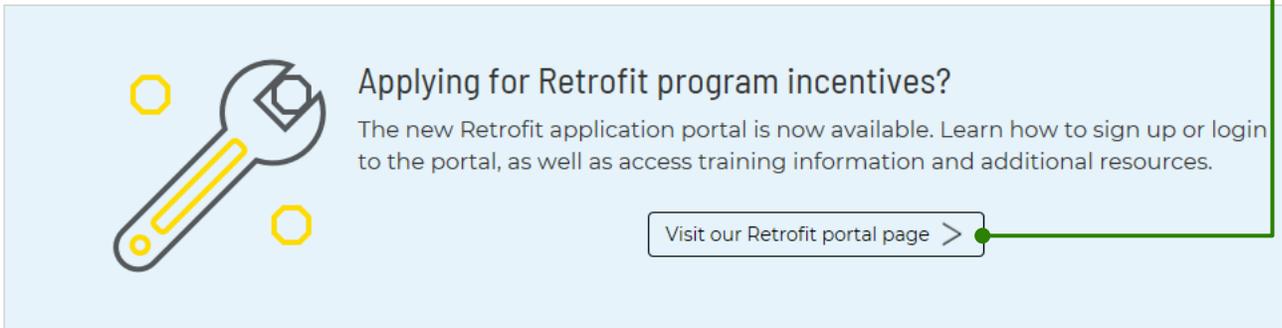
04 Select **Retrofit program**.



Registering for the Retrofit Program

Step 1: Registering for the Okta Portal

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



Applying for Retrofit program incentives?

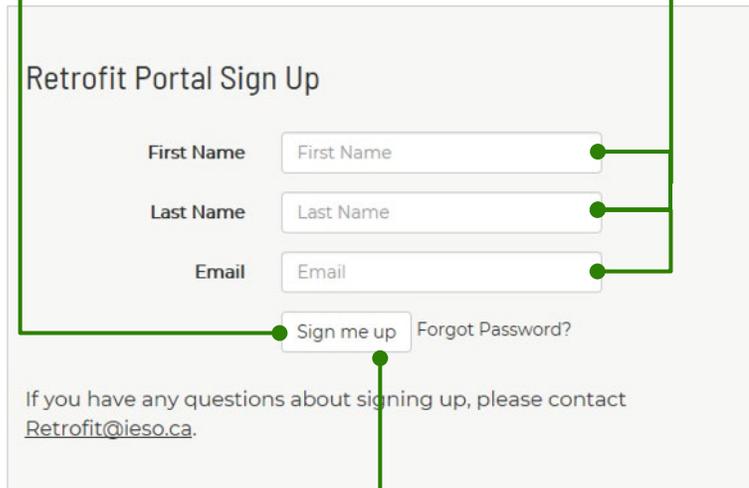
The new Retrofit application portal is now available. Learn how to sign up or login to the portal, as well as access training information and additional resources.

Visit our Retrofit portal page >

This screenshot shows a light blue banner with a wrench and bolts icon on the left. The text on the right asks 'Applying for Retrofit program incentives?' and provides information about the new application portal. A button labeled 'Visit our Retrofit portal page >' is on the right. A green line connects the button to the instruction '05 Click Visit our Retrofit portal page.'

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

07 Click **Sign me up.**



Retrofit Portal Sign Up

First Name

Last Name

Email

[Forgot Password?](#)

If you have any questions about signing up, please contact Retrofit@ieso.ca.

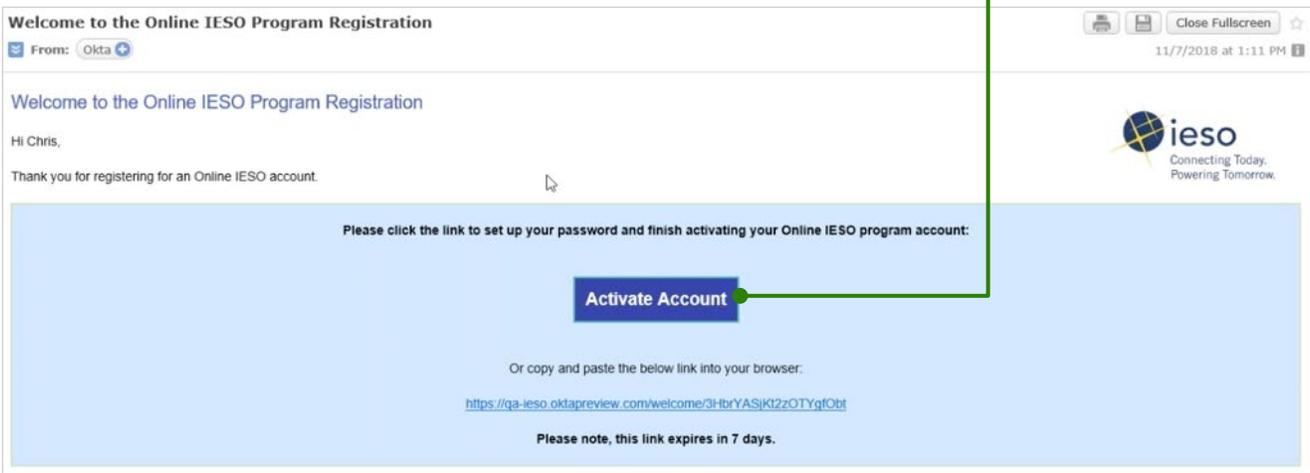
This screenshot shows a 'Retrofit Portal Sign Up' form with three input fields: 'First Name', 'Last Name', and 'Email'. Below the fields are a 'Sign me up' button and a 'Forgot Password?' link. A green line connects the 'Sign me up' button to the instruction '07 Click Sign me up.' Another green line connects the three input fields to the instruction '06 Enter your first name, last name and an email address.'

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

Registering for the Retrofit Program

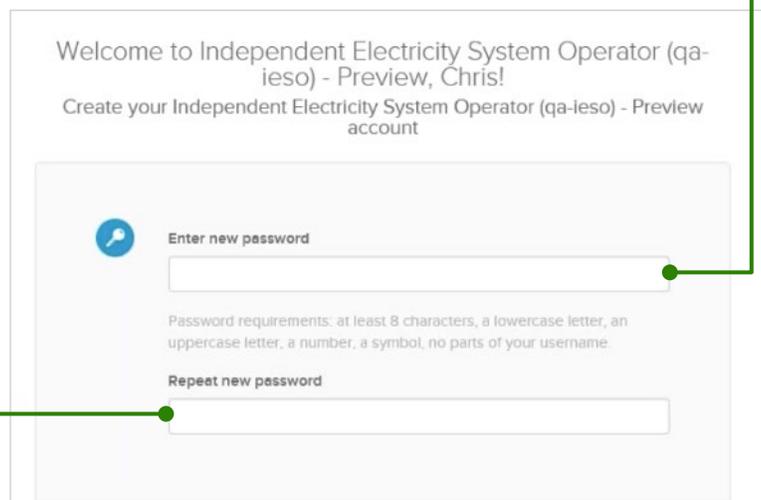
Step 1: Registering for the Okta Portal

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.

Choose a forgot password question
What is the food you least liked as a child?

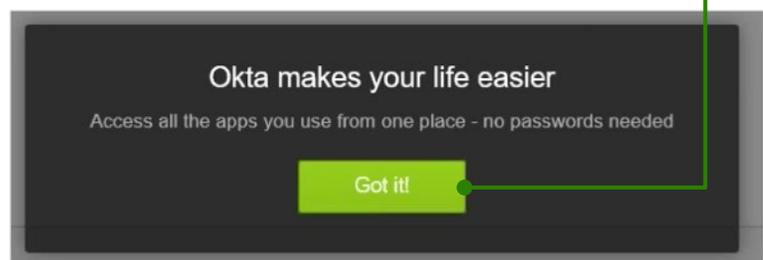
Answer
Brussel Sprouts

Create My Account

13 Click **Create My Account**.

This step brings you to the Okta portal.

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

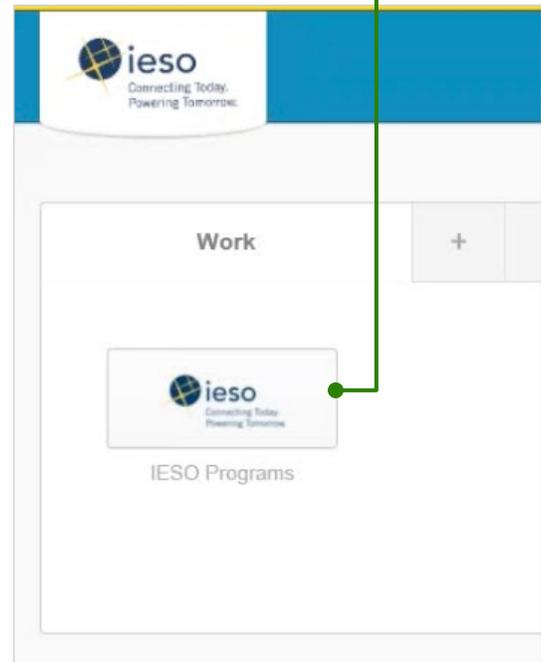


You can now register for the Retrofit program.

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 with the following fields and callouts:

- 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 with options: Applicant, Applicant Rep.
- Select where you heard about the Save on Energy Program.** Points to the 'Where did you hear about the Save on Energy Program? *' dropdown menu.
- REGISTER** button is highlighted in green.

Form content:

Retrofit Registration

First Name C
Last Name Monty
Email cmonty2018testing@outlook.com

Phone Number *

Account Type *
 Applicant Applicant Rep

Where did you hear about the Save on Energy Program? *
-- Select a value --

Address 1 *
Address 2 Address 3
City * Province * Postal Code *
Country *
--- Select a Country ---

CANCEL REGISTER

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		
Email itzanami84@ujxspots.com	Phone Number 4165555555	City Toronto	Province Ontario	Postal Code M6E3H8
Account Type		Country Canada		
<input checked="" type="checkbox"/> Applicant				
<input checked="" type="checkbox"/> 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

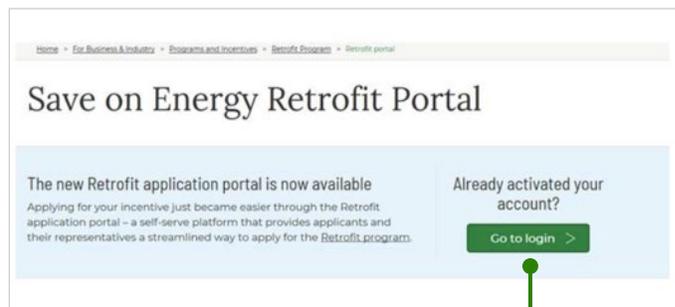
Program Information

- 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 iESO Sign In form. The form is titled "Sign In" and features the iESO logo at the top. Below the logo is a placeholder for a profile picture. The form contains three input fields: "Username" (with a dropdown arrow), "Password", and "Remember me" (a checkbox). At the bottom of the form is a blue button labeled "Sign In". Green lines with dots at the end point from the instruction "03 Enter your username and password." to the Username and Password fields, and from the instruction "04 Click Sign in." to the Sign In button.

Logging into the Retrofit Portal

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

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

Click **Need help?**

Click **Forgot password?**

05 Click **Submit a Retrofit Application.**

Retrofit

SAVE ON ENERGY
POWER WHAT'S NEXT

Submit a Retrofit Application

The Retrofit program is designed to provide a variety of options for businesses, so you can find the right fit for your operations, regardless of your industry.

This final step opens 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**

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- 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

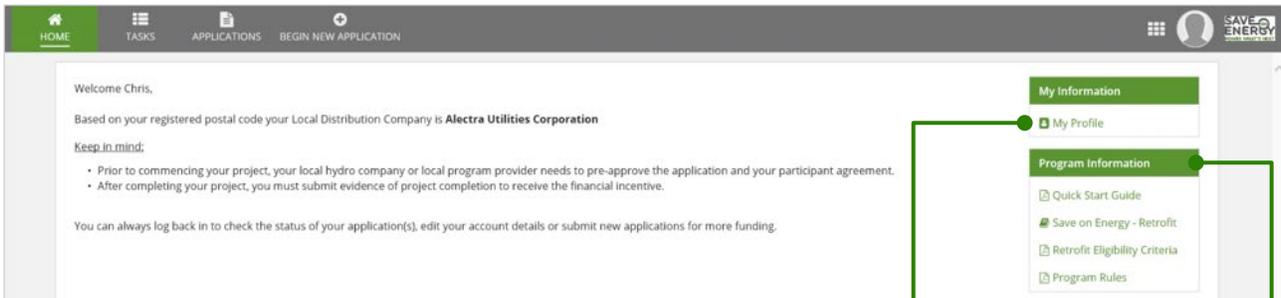
Program Information

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

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.

The screenshot shows the 'Pending Actions' page in the Retrofit Portal. At the top, there is a navigation bar with 'HOME', 'PENDING ACTIONS', 'APPLICATIONS', and 'BEGIN NEW APPLICATION'. Below this is a 'Task List' section with a search form. The search form includes fields for 'Application Id', 'Company Name', 'Application Name', 'Lead LDC', and 'Application Status Milestone', along with 'Task Created From' and 'Task Created To' date pickers. A 'RESET' button is located below the search fields. Below the search form is a table with the following data:

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.

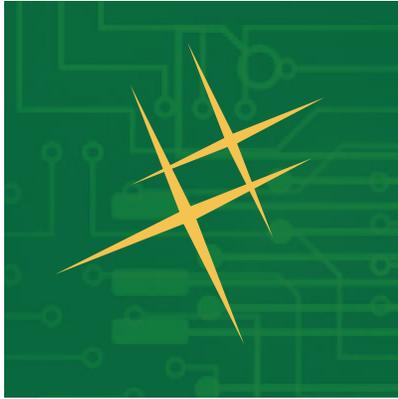
The screenshot shows the 'APPLICATIONS' page in the Retrofit Portal. At the top, there is a navigation bar with 'HOME', 'PENDING ACTIONS', 'APPLICATIONS', and 'BEGIN NEW APPLICATION'. Below this is a search and filter section. A search box with a magnifying glass icon and a 'SEARCH' button is on the 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 the filters is a table with the following 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 single row of data is visible, with the 'Application Id' being 2000229 and the 'Status' being '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](#)

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.

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

1. **Important:** Prior to commencing your projects, ensure that the LDC associated with the application has provided approval on the CDM IS application.
2. 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.
3. The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.
4. 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.
5. 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.
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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

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.

Begin a Retrofit Application

> About the RETROFIT PROGRAM Application Process
> Starting the RETROFIT PROGRAM Application Process
Select an Applicant Representative (Optional)

App Rep's Email Address
mohammed.dildhar@ieso.ca

SEARCH

First Name: Mohammed
Last Name: Dildhar

COMPLETE THE APPLICATION MYSELF SEND TO APP REP

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.



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

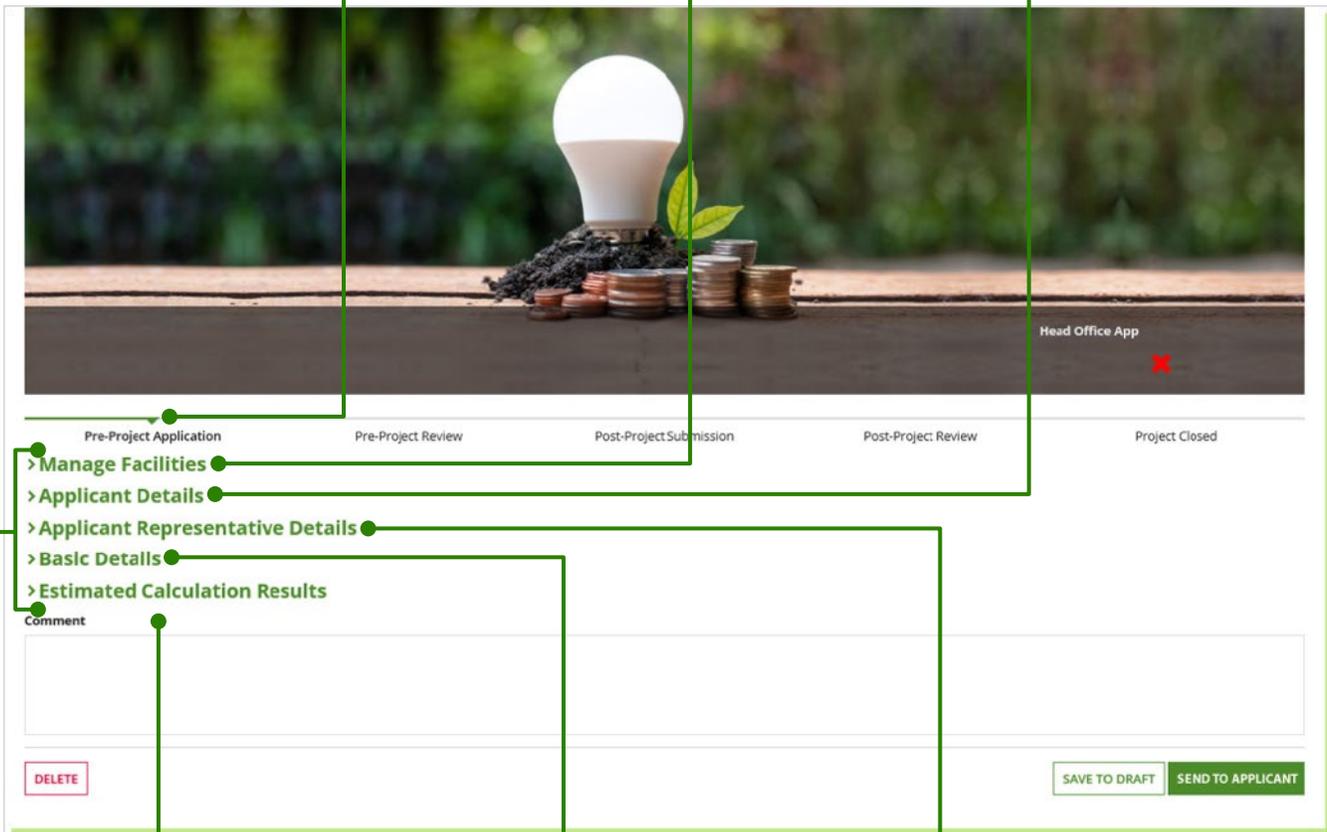
Beginning the Application (as an Applicant Representative)

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.

▼ 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 #	Address 3
<input type="text" value="756822487RT0001"/>		<input type="text"/>	<input type="text"/>
		City *	Province *
		<input type="text" value="St. Catharines"/>	<input type="text" value="Ontario"/>
		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	Michael	Last Name	Tsao
Email	michael.tsao@ieso.ca	Phone Number	1234567890

Creating an Application

Adding Basic Project Details

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

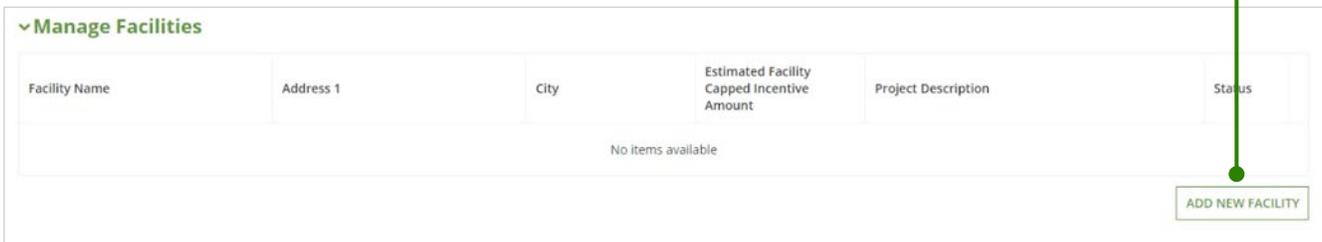
The screenshot shows a web form titled "Basic Details" with the following fields and callouts:

- Project Name ***: A text input field containing "Lighting Retrofit: Project - Internal Fixtures". A callout above it says "Enter a project name."
- Project Description ***: A text input field containing "Replace lighting with Retrofit: options". A callout to its right says "Enter a project description."
- Have you received any other financial incentives for this project by any other public program? ***: A radio button form with "Y" selected and "N" unselected. A callout to its left says "Select whether you have received other financial incentives for the project."
- Funding Comments ***: A large text area. A callout to its right says "If you are receiving other financial incentives, you must provide funding information."
- Funding Provider(s) ? ***: A text input field.
- Name of Program(s) ? ***: A text input field.
- Estimated Project Start Date**: A date field with "Mar 10, 2019".
- Estimated Project End Date**: A date field with "Mar 10, 2019".

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.

The screenshot shows a 'Basic Details' form with the following fields and callouts:

- Facility Name ***: Callout: "Enter the facility name." (Value: Acme Electric)
- Facility Type ***: Callout: "Select the facility type." (Value: Commercial - Large Retail)
- Ownership Type ***: Callout: "Select the ownership type." (Value: Owner)
- Address 1 ***: Callout: "Enter the facility address, including the city, province and postal code." (Value: 123 Any Street)
- Address 2/Unit #**: (Empty)
- Address 3**: (Empty)
- City ***: (Value: Toronto)
- Province**: (Value: ON)
- Postal Code ***: (Value: M6E3H8)
- Local Distribution Company ***: (Value: --- Select an LDC ---)
- Electric Utility Account ***: Callout: "Enter the electric utility account." (Value: 123456789)
- Estimated Project Start Date ***: Callout: "Select an estimated project start and end date." (Value: 02/25/2019)
- Estimated Project End Date ***: (Value: 03/01/2019)
- Description ***: Callout: "Enter a project description." (Value: 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	Facility Name
<input type="text"/>	<input type="text"/>
City	Address1
<input type="text"/>	<input type="text"/>
<input type="button" value="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					
<input type="button" value="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.

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 cost details
- Select the Prescriptive Measures and enter the quantities which you are installing
- Expired Measures selected will in an Expired worksheet, require prior LDC course if 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 declared as T5 technology.

Assumed Base Case 40C 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**

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 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.

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**.

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.

Enter the measure name.

Select the measure category.

Basic Details

Custom Measure Name *
Exterior Lighting

Category *
Lighting

Base Case Description *
HID Street Lights

Manufacturer *
XYZ

Model Number *
123

Energy Efficient Case Description *
LED StreetLights

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.

The screenshot shows a form titled "Other Details" with the following fields and callouts:

- Estimated Base Case Consumption (kWh)***: 10000000. Callout: "Enter the estimated base case consumption."
- Estimated Energy Efficient Case Consumption (kWh)***: 999999. Callout: "Enter the estimated energy efficient case consumption."
- Estimated Base Case Demand (kW)**: 10. Callout: "Enter the estimated base case demand."
- Estimated Energy Efficient Case Demand (kW)**: 10. Callout: "Enter the estimated energy efficient case demand."
- Estimated Consumption Savings**: 99,000,001.000 kWh. Callout: "The estimated consumption savings is automatically calculated based on the consumption estimates."
- Estimated Custom Measure Installation Cost***: 700000. Callout: "Enter the estimated custom measure installation cost."
- Estimated Equipment Cost**: 500000. Callout: "Enter the estimated equipment cost."
- Estimated Demand Reduction**: 0.000 kW. Callout: "The estimated demand reduction and incentive amount are automatically calculated based on the demand estimate."
- Estimated Calculated Incentive Amount**: \$4,950,000.05. Callout: "The estimated demand reduction and incentive amount are automatically calculated based on the demand estimate."
- Buttons**: CANCEL, SAVE TO DRAFT, APPLY. Callout: "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.

▼ 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

UPLOAD  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.

Upload Documents for Facility

Upload Files

	Creation User	Creation Date
Test Document DOCX - 12.33 KB	Yuhe Yuan	11/7/2018 1:54 PM EST

+ Drop files here

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	190,413.500	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 →

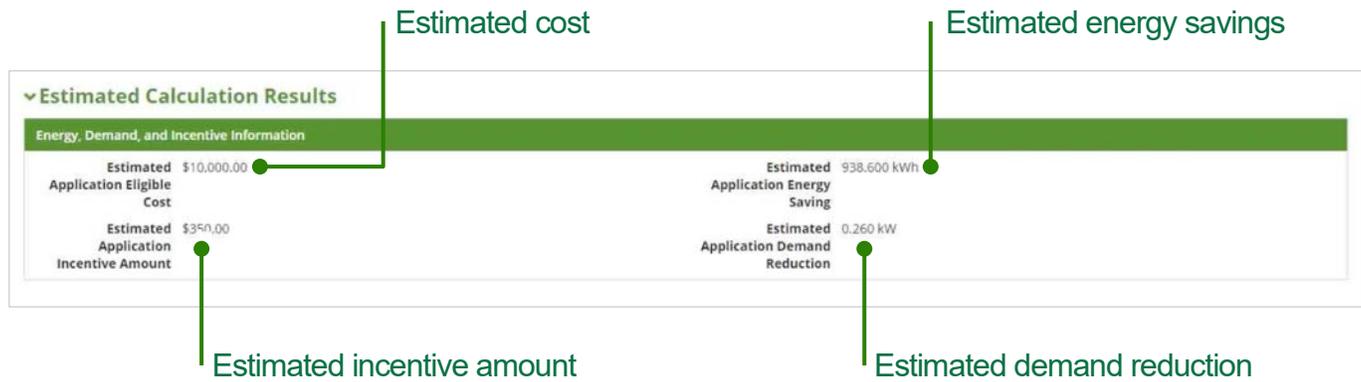
Note: If you do not refresh the page, the duplicated facility will not appear in the application facility list.

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.

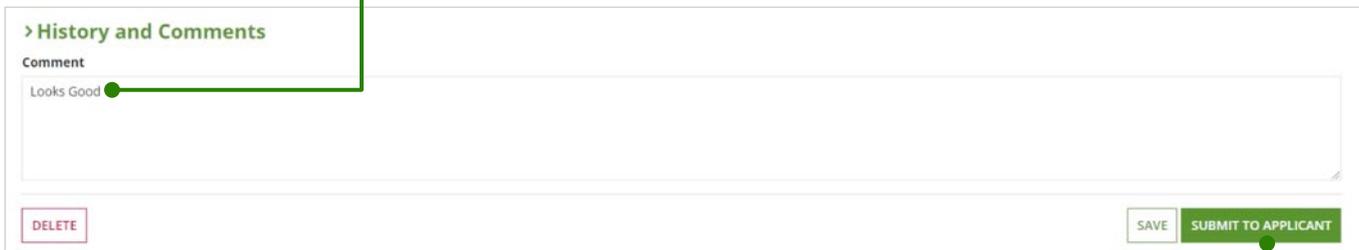
If you're an **Applicant**, continue to **Submitting the Application** on **p. 43**.

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.



The screenshot shows a web interface for reviewing an application. At the top left, there is a section titled '> History and Comments'. Below this, there is a 'Comment' field containing the text 'Looks Good'. To the right of the comment field, there are three buttons: 'DELETE', 'SAVE', and 'SUBMIT TO APPLICANT'. A green line connects the text '01 Enter a comment.' to the comment field. Another green line connects the text '02 Click SUBMIT TO APPLICANT.' to the 'SUBMIT TO APPLICANT' button.

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**.

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**.

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 SYSTEMS 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.

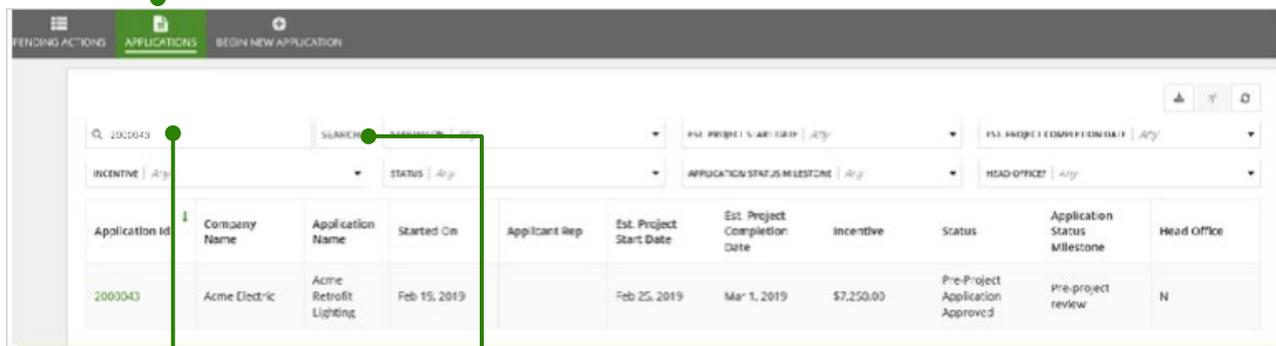
Upon completion of the project, the Applicant will:

- 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

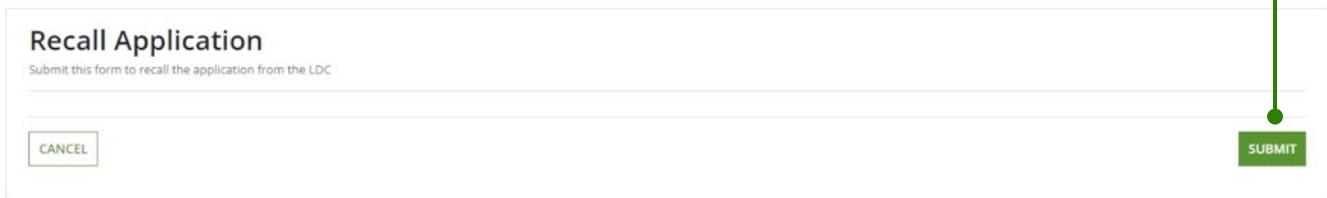
05 Click **Related Actions**.

06 Click **Recall Application**.



Recalling an Application

07 Click **SUBMIT**.

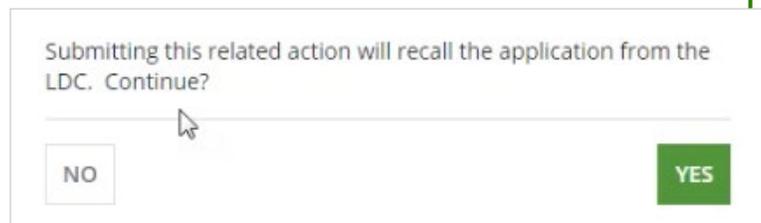


Recall Application
Submit this form to recall the application from the LDC

CANCEL 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**.



Submitting this related action will recall the application from the LDC. Continue?

NO YES

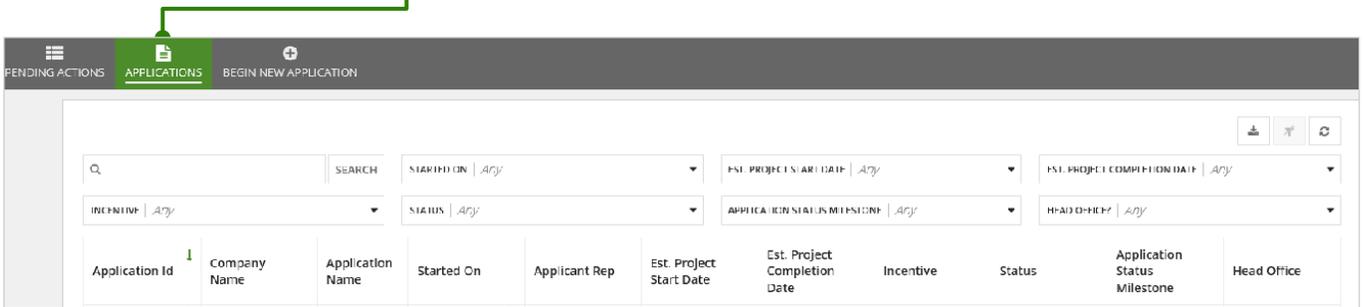
The Applicant will now receive an email notification to edit the application.

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**.



02 Enter the application ID.

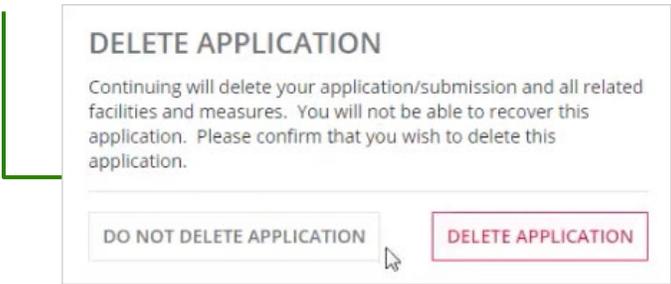
03 Click **SEARCH**.

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 **DELETE**.



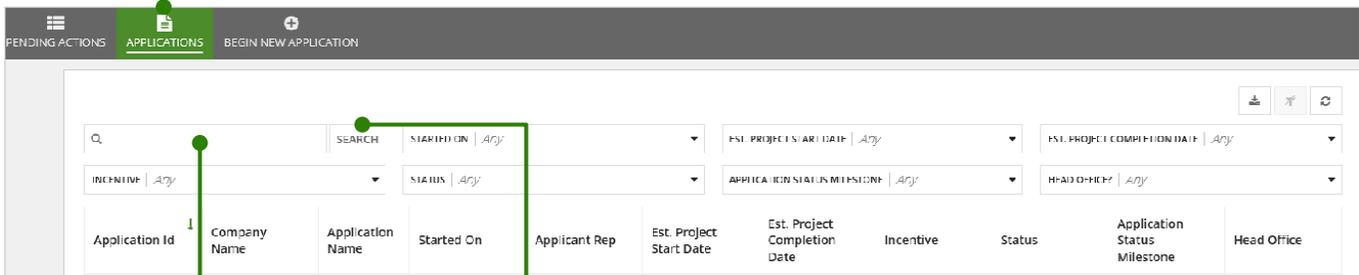
06 Click **DELETE APPLICATION**.



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.

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

05 Click **Related Actions**.

Retrofit Application: Lighting Retrofit 2

Summary
Related Actions

↶

Recall Application

Related action process to recall the application

📄

Copy Application

Click to copy this application

06 Click **Copy Application**.

07 Click **YES**.

Are you sure you want to copy this application?

NO
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.

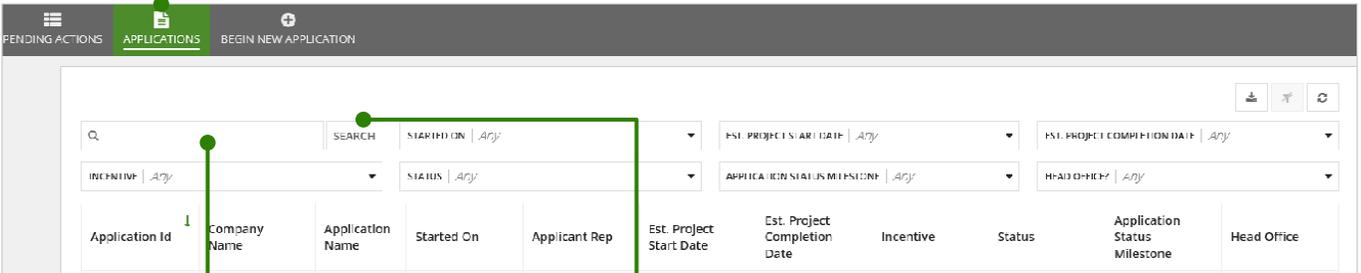
Note: The application that is being copied remains unchanged.

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.

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.

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	Click here to view 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

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

Responding to Save on Energy Analyst Edit Requests

Editing an Application

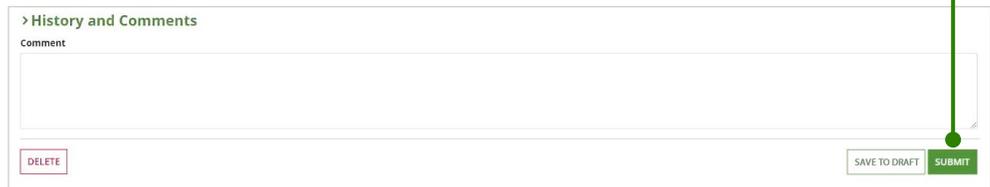
06 Click **EDIT RETURNED APPLICATION**.



07 Make the required edits to the application.

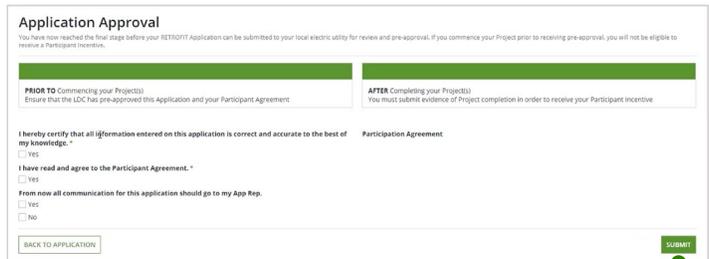
08 Enter a comment.

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**.

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					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
----------	---------------------	---------------------	--------------	---------------------

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.

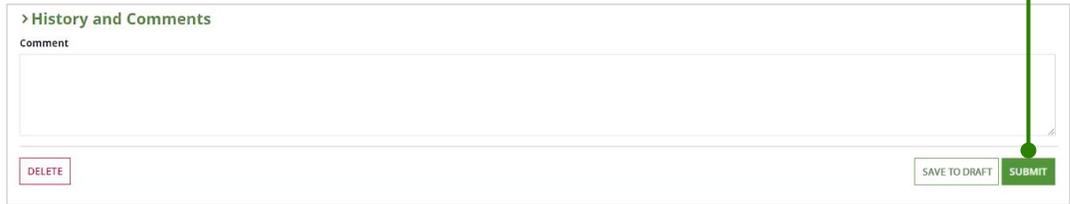
Responding to Save on Energy Analyst Edit Requests

Approving an Edited Application

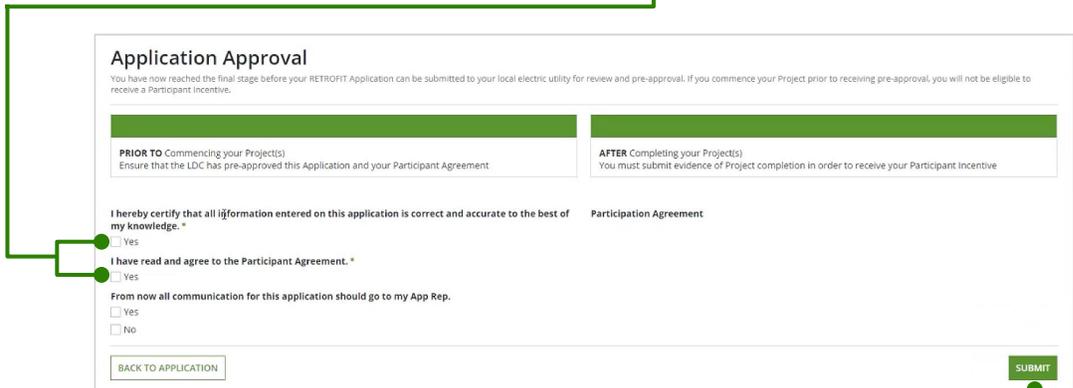
07 Click **EDIT RETURNED APPLICATION**.



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 a form titled "Basic Details" with the following fields and callouts:

- Facility Name ***: Text input field containing "Social Housing Adder and advance".
- Facility Type ***: Dropdown menu with "Multi-Residential - Social Housing Provider" selected. A green callout line points to this dropdown.
- Ownership Type ***: Dropdown menu with "-- Select a value --".
- Address 1 ***: Text input field containing "120 Adelaide St".
- Address 2**: Text input field.
- Address 3**: Text input field.
- Electric Utility Account ***: Text input field.
- City ***: Text input field.
- Province**: Dropdown menu with "ON" selected.
- Postal Code ***: Text input field.
- Local Distribution Company ***: Dropdown menu with "-- Select an LDC --".
- Are you applying for a Social Housing Adder? ***: Radio buttons for "Y" (selected) and "N". A green callout line points to the "Y" button.
- What percentage of your incentive do you want to receive in advance? % ***: Text input field. A green callout line points to this field.

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 form with two columns. The first column is titled "M&T Advance Incentive Requested" and has two radio buttons: "Yes" (which is selected with a green dot) and "No". The second column is titled "Maximum M&T Advance Incentive" and has the value "\$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 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 * 700000	Estimated Calculated Incentive Amount \$4,950,000.00
Estimated Equipment Cost * 500000	<small>Calculated incentive is based upon Consumption (kWh)</small>

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

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.

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	Maximum M&T Advance Incentive
<input checked="" type="radio"/> Yes <input type="radio"/> No	\$3,500.00

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

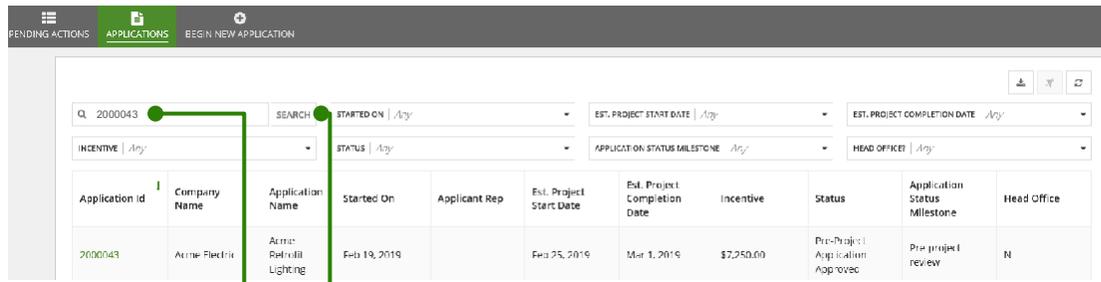
The application will now include the request for an M&T advance incentive.

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.



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.

Energy, Demand, and Incentive Information	
Estimated Application Eligible Cost	\$10,000.00
Estimated Application Incentive Amount	\$900.00
Estimated Application Energy Saving	6,074.640 kWh
Estimated Application Demand Reduction	2,340 kW
Advance Incentive	
Total Approved Advance Incentive	\$500.00
Total Approved Advance Incentive	\$500.00
Maximum SHA Incentive	\$900.00
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 SUBMIS...

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**.

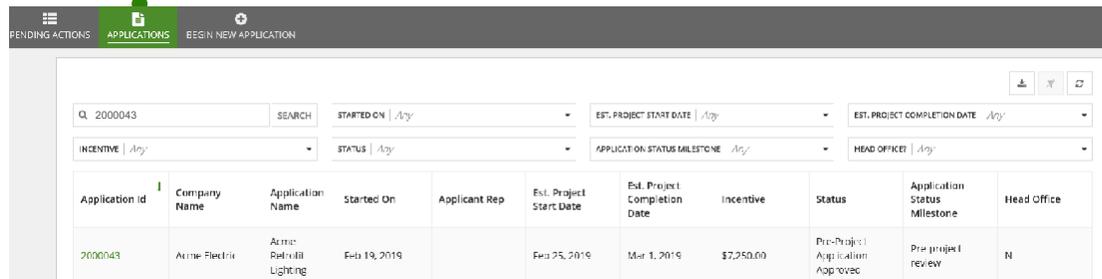
The Save on Energy Analyst will now receive a notification to review the advance incentive invoice.

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.



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 *

I

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.

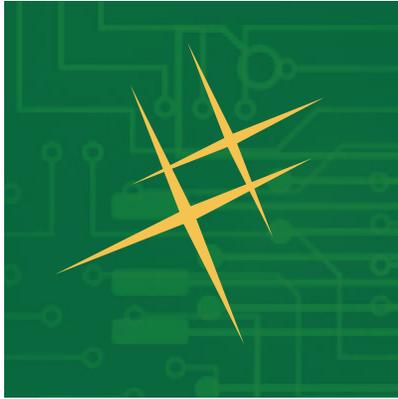
Click **SUBMIT TO APPLICANT**.

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

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**.

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 SUBMISS...

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 **Address 1** 120 Adelaide
Facility Type Commercial - Large Office **Ownership Type** Owner **Address 2**
Electric Utility Account 35135135 **City** Toronto **Province** ON **Address 3**
Local Distribution Company TORONTO HYDRO-ELECTRIC SYSTEM LIMITED **Postal Code** M5A1R1

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	Manufacturer *	XYZ
End Use	Lighting -Large Office	Actual Quantity *	20
Conservation Measure Name	INTEGRAL LED TROFFERS		Estimated value: 25.000
Conservation Measure Description	2' x 2' LED troffer (= 2000 Lumens)	Model Number *	123
Incentive Per Unit	\$35.00	ES DLC Code	XGD3513
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.	kW Reduction	0.520 kW Estimated value: 0.650
Assumed Base Case	Ubend 32W- 2 lamp T8	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: \$50,000,000

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**.

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

<p>Actual Base Case Consumption (kWh) * 150000000 <small>Estimated value: 100,000,000.000kWh</small></p> <p>Actual Energy Efficient Case Consumption (kWh) * 0 <small>Estimated value: 999,999,000kWh</small></p> <p>Actual Consumption Savings 150,000,000.000 kWh <small>Estimated value: 99,000,001.000kWh</small></p> <p>Actual Custom Measure Installation Cost * 700000 <small>Estimated value: \$70,000,000</small></p> <p>Actual Equipment Cost * 50000 <small>Estimated value: \$50,000,000</small></p>	<p>Actual Base Case Demand (kW) * 0 <small>Estimated value: 10.000kW</small></p> <p>Actual Energy Efficient Case Demand (kW) * 0 <small>Estimated value: 10.000kW</small></p> <p>Actual Demand Reduction 0.000 kW <small>Estimated value: 0.000kW</small></p> <p>Actual Calculated Incentive Amount * \$7,500,000.00 <small>Estimated value: 4,950,000.050. Actual Incentive is based upon Consumption (kWh)</small></p>
---	--

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.



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.

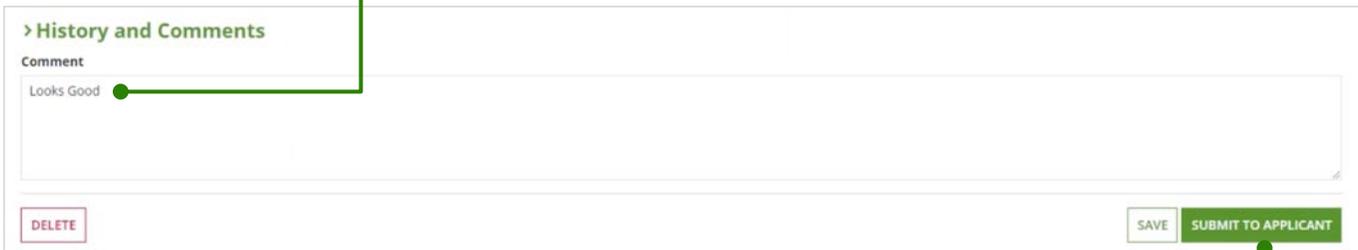
If you're an **Applicant Representative**, you must forward the post-project submission to the Applicant. Continue to **Forwarding the Post-Project Submission to the Applicant** on p. 73.

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.



The screenshot shows a web interface for managing a post-project submission. At the top left, there is a section titled '> History and Comments'. Below this, there is a 'Comment' field containing the text 'Looks Good'. To the left of the text is a small green dot, and a green line connects this dot to the '01 Enter a comment.' instruction. At the bottom of the comment box, there are three buttons: a pink 'DELETE' button on the left, a white 'SAVE' button in the middle, and a green 'SUBMIT TO APPLICANT' button on the right. A green line connects the 'SUBMIT TO APPLICANT' button to the '02 Click SUBMIT TO APPLICANT.' instruction.

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' page with the following search filters:

- Application Id: 2000409
- Company Name: (empty)
- Application Name: (empty)
- Lead LDC: -- Select a Value --
- Application Status Milestone: -- Select a Value --
- Task Created From: mm/dd/yyyy
- Task Created To: mm/dd/yyyy
- Application Track: -- Select a Value --

A 'RESET' button is located below the date filters. Below the filters is a table with the following data:

Name	Company Name	Application Name	Application Id	Task Created	Lead LDC	Application Status Milestone	Application Track
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	Prescriptive & Custom

02 Enter the application ID.

03 Click **RESET**.

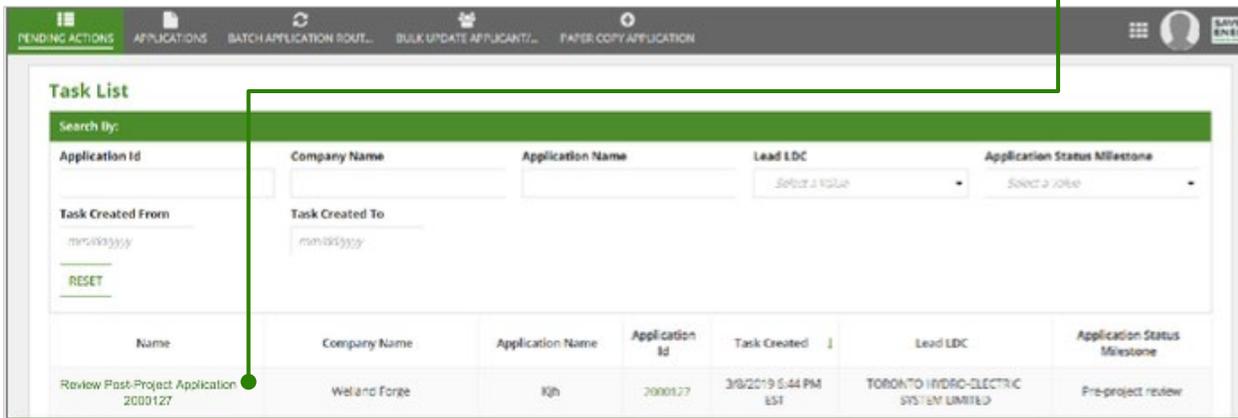
This close-up shows the date input fields and the 'RESET' button:

- Task Created From: mm/dd/yyyy
- Task Created To: mm/dd/yyyy
- RESET button

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).

Comment

Looks good

DELETE SAVE TO DRAFT SEND TO APP REP **SUBMIT**

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. * Participation Agreement

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.

The screenshot displays a web application interface for a project titled "Lighting Retrofit 2". The top section features the project name in large white text on a dark background, with the "Application Id" 102066 displayed to the right. Below this, a horizontal line separates the header from the main content area. The main content area is divided into two columns: "Pre-Project Application" on the left and "Pre-Project Review" on the right. Under the "Pre-Project Application" column, there is a section titled "Application Version" with two radio button options: "Current" (which is selected, indicated by a green dot) and "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**.

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". At the top, it displays "Invoice Amount \$1,925.00" and "Multi Site Demonstration". Below this is a section labeled "Final Invoice*" which contains an "UPLOAD" button and a "Drop file here" field. Underneath is a "Comment" section with a large text input area. At the bottom left is a "CANCEL" button and at the bottom right is a green "SUBMIT" button. Green callout lines connect the text instructions to the "UPLOAD" button, the "Drop file here" field, 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.

SAVE
ENERGY[™]
POWER WHAT'S NEXT

SAVE
ENERGY[™]
POWER WHAT'S NEXT