RETROFIT PROGRAM
POST-PROJECT SUBMISSION CHECKLIST

Step 1

Gather the required documentation

Ensure you acquire the following required documents while implementing your project:

- ☐ **Itemized invoice**
  The invoice must list make, model number, and quantity purchased. Please use the pre-tax total for the purpose of your application. See program requirements for eligible project costs.

- ☐ **Proof of payment**
  Proof of payment can be in the form of signature or "Paid" stamp from the contractor; copy of processed cheque(s); online banking account screenshot; debit or credit card receipt; copy of credit card statement; or accounting system screen shot.

- ☐ **Proof of disposal and/or decommissioning**
  Disposal certificate or receipt(s), i.e., documentation with itemized listing of all old equipment types, wattages, and quantities.

- ☐ **Updated worksheets, supporting calculations, specification sheets**
  If measures, operating hours, or equipment have changed since the pre-project approval, new worksheets/calculations/specification sheets must be provided.

- ☐ **M&V and QA/QC photographic evidence**
  If applicable, include documentation based on project type. Please refer to your M&V plan and photo requirements.

- ☐ **Any additional items required as communicated at the pre-project approval**
  Submit additional items as specified by the application reviewer.

Step 2

Complete your approved project installation

- ☐ Complete project as per pre-project approval.

⚠ Please let your application reviewer know if there are any changes to your project scope before the post-project submission.

Need Help? Give us a call!
Contact the Retrofit Support line for support at **1-844-303-5542** or **retrofit@ieso.ca.**

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Step 3

Begin your post-project submission in the portal

- [ ] Log on to your Retrofit Portal account and continue your application.

  If you require help with the application process, watch the Save on Energy How-To Videos.

- [ ] Enter in the required fields including:
  - Actual project start date
  - Actual project completion date

- [ ] Make any revisions to your application as necessary, such as:
  - Project details (measure quantities, savings, etc.)
  - Final project cost without HST. See program requirements for eligible costs.
  - Applicant address where incentive payment will be mailed to
  - HST number, if applicable

- [ ] Upload the required documentation previously gathered for your project.

Instructions for the applicant representative

If you are an applicant representative, please make sure your applicant logs into his or her account, accepts the participant agreement and accepts the post-project submission. See Resources and Support links.

Step 4

Submit your application to continue the application review process

⚠ Only applicants can accept the participant agreement and submit the application.

- [ ] Respond to questions from application reviewers who will contact you if any clarifications or revisions are required.

Step 5

Submit the invoice for your approved incentive after post-project approval

- [ ] Upload the incentive invoice in the portal under your application. See incentive invoice guide and invoicing FAQs.

⚠ The application number will be referenced on your cheque. Make sure your finance department is aware of the application number and payment amount.

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