RETROFIT PROGRAM
PRE-PROJECT APPLICATION CHECKLIST

Step 1

Review eligibility criteria

☐ Review the Save on Energy key documents to ensure that your project is eligible for a **Save on Energy Retrofit Program** incentive.

Key documents include:
- Participant agreement
- Program requirements
- Measure-specific worksheets
- Measurement and verification (M&V) guidelines for custom projects

⚠ **You must accept the participant agreement and submit your application before entering into a binding commitment or the application will be ineligible.**

Step 2

Create your applicant and/or applicant representative Retrofit portal account

☐ If you need help creating your Retrofit portal account, watch the Registering for the Program video or contact Retrofit Support Services at 1.844.303.5542.

⚠ **Only applicants can accept and submit the participant agreement. Therefore, applicants need to create an account.**

Step 3

Begin your Retrofit program application

☐ Log on to your Retrofit portal account and begin your application.
If you require help with the application process, watch the Save on Energy How-To Videos.

☐ Assign an applicant representative, if applicable.

☐ Enter your facility details and determine the appropriate track for your projects (i.e., prescriptive or custom).

Instructions for the applicant representative

If you are an applicant representative, please ensure the applicant completes the following steps after yo created and submitted the application to the applicant:

1) Applicant logs into his or her Retrofit portal account
2) Applicant opens application under "Pending Actions" tab
3) Applicant clicks "Submit" at the bottom of the page, then selects the checkbox to agree to the participant agreement & clicks "Submit" again and then clicks "Okay" on the confirmation page

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Step 4

Provide supporting documentation for your project*

- [ ] Follow the checklist below to upload the required documentation, where applicable, for each facility in your application. You may be asked for additional information.

Prescriptive Projects

- [ ] Project cost** estimates, quotes, or proposals with model numbers
- [ ] List of existing equipment
- [ ] Manufacturer specification sheet(s) for each new measure
- [ ] Base case and retrofit case photos as your project may be selected for random QA/QC or subject to verification. See photo requirements.

Custom Projects

- [ ] Project cost** estimates, quotes, or proposals with model numbers
- [ ] Completed custom worksheets
- [ ] Supporting calculations for energy (kWh) and demand (kW) savings
- [ ] Manufacturer specification sheets for each new measure
- [ ] M&V plan (required for projects with estimated incentive amounts > $10,000, refer to M&V guidelines)
- [ ] Equipment operating hours
- [ ] Base case and retrofit case photos as your project may be selected for random QA/QC or subject to verification. See photo requirements.

** If you are a tenant/leaseholder, ensure you have owner permission*
*** See program requirements for eligible project costs*

Step 5

Submit your application to start the application review process

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

You may start your project after application submission, prior to pre-project approval, however you assume the risk that you may receive a lower incentive or the application may not be eligible.

- [ ] Respond to questions from application reviewers who will contact you if any clarifications or revisions are required.
- [ ] Submit advance incentive invoice after pre-project approval if applicable.

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