


## Step 1

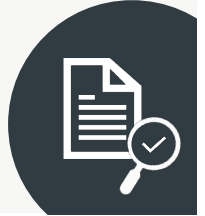
### Review eligibility criteria

- 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.

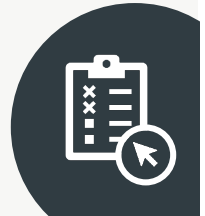
-  Only applicants can accept and submit the participant agreement. Therefore, applicants need to create an account.



## 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 you 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

## 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](mailto:retrofit@ieso.ca).