# Table of Contents

## Getting Started

Retrofit Program Roles ......................................................................................................................... 5
Registering for the Retrofit Program ......................................................................................................... 6

- Step 1: Registering for the Okta Portal .................................................................................................. 6
- Step 2: Registering for the Retrofit Program .......................................................................................... 10

Logging into the Retrofit Portal ............................................................................................................. 13
Retrofit Portal Overview ........................................................................................................................... 15

## Project Applications

Creating an Application ............................................................................................................................ 19

- Beginning the Application (as an Applicant) ...................................................................................... 19
- Assigning an Application to an Applicant Representative .................................................................. 21
- Beginning the Application (as an Applicant Representative) ............................................................... 23

Reviewing Applicant Details .................................................................................................................. 25
Adding Basic Project Details .................................................................................................................. 26
Adding Facilities .................................................................................................................................... 27
- Duplicating a Facility ............................................................................................................................ 39
- Reviewing Estimated Calculation Results ......................................................................................... 41
- Forwarding the Application to the Applicant ...................................................................................... 42
- Submitting the Application .................................................................................................................. 43

Recalling an Application ......................................................................................................................... 47
Cancelling an Application ......................................................................................................................... 49
Copying an Application ............................................................................................................................ 50
Responding to Save on Energy Analyst Edit Requests ........................................................................... 51

- Editing an Application .......................................................................................................................... 51
- Approving an Edited Application ........................................................................................................ 53

Submitting an Advance Incentive Request ............................................................................................... 56

- Applying for a Social Housing Incentive ............................................................................................ 56
- Applying for a Monitoring and Targeting Incentive ......................................................................... 58

Submitting an Advance Incentive Invoice ............................................................................................... 60
Amending an Approved Application ........................................................................................................ 62
Table of Contents (cont...)

Post-Project Submissions ........................................................................................................ 66

Creating a Post-Project Submission ....................................................................................... 67
  Beginning the Post-Project Submission ............................................................................. 67
  Entering Project Data ........................................................................................................... 68
  Forwarding the Post-Project Submission to the Applicant .................................................. 74
  Submitting the Post-Project Submission .......................................................................... 75

Submitting an Invoice ............................................................................................................. 79
Getting Started
Retrofit Program Roles

There are several roles involved in creating and reviewing a Retrofit project application and post-project submission.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant</td>
<td>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. <strong>Only the Applicant can submit applications or post-project submissions.</strong></td>
</tr>
<tr>
<td>Applicant Representative</td>
<td>An Applicant Representative is an <em>optional</em> surrogate that creates the application and post-project submission on the Applicant’s behalf. <strong>An Applicant Representative cannot submit applications or post-project submissions.</strong></td>
</tr>
<tr>
<td>Save on Energy Analyst</td>
<td>The Save on Energy Analyst manages Retrofit projects for the IESO. They review and provide final approval on all applications and post-project submissions.</td>
</tr>
</tbody>
</table>
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.

1. Open [www.saveonenergy.ca](http://www.saveonenergy.ca).
2. Hover over For Business and Industry.
3. Click Programs and Incentives.
4. Select Retrofit program.
Registering for the Retrofit Program

Step 1: Registering for the Okta Portal

05 Click Visit our Retrofit portal page.

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

07 Click Sign me up.

When you click Sign me up, an activation email is sent to your email address.
Registering for the Retrofit Program

Step 1: Registering for the Okta Portal

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

09 Enter a password.

10 Re-enter the **same password**.
Registering for the Retrofit Program

Step 1: Registering for the Okta Portal

11 Select a security question. If you forget your password, this question will be used to verify your identity.

12 Enter the answer to the question.

13 Click Create My Account.

This step brings you to the Okta portal.

14 Click Got it! to close the dialogue box.

You can now register for the Retrofit program.
Registering for the Retrofit Program

Step 2: Registering for the Retrofit Program

01 Click the IESO logo.

02 Click Register for Retrofit.
Registering for the Retrofit Program

Step 2: Registering for the Retrofit Program

03 Complete the mandatory fields in the Retrofit Registration section.

- Enter a contact number.
- Complete the address section.
- Select the account type. You can register as an Applicant, Applicant Representative or both.
- Select where you heard about the Save on Energy Program.

04 Click REGISTER.
Registering for the Retrofit Program

Step 2: Registering for the Retrofit Program

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

<table>
<thead>
<tr>
<th>Register for Retrofit</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Joe</td>
</tr>
<tr>
<td>Email: <a href="mailto:joe@xyz.com">joe@xyz.com</a></td>
</tr>
<tr>
<td>Applicant</td>
</tr>
<tr>
<td>Applicant Representative</td>
</tr>
</tbody>
</table>

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.
Logging into the Retrofit Portal

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

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

02 Click Go to login.

03 Enter your username and password.

04 Click Sign in.
Logging into the Retrofit Portal

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

Click Need help?
Click Forgot password?

05 Click Submit a Retrofit Application.

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

Home

When you log in, you arrive at the Retrofit portal **Home** page. From here you can navigate to different portal sections using the tabs at the top of the page.

Click **My Profile** to view or edit your profile. A variety of Retrofit program information is available.
Retrofit Portal Overview

Pending Actions

The **Pending Actions** page is where you find assigned tasks for your current Retrofit project(s).

You can search for tasks by application ID, company name, Lead LDC, application status milestone or creation date and then click **RESET** to update the task list.

Click a task name to begin the task.  
Click any header to sort your tasks by that criteria.  
Click an application ID to open the application.
Retrofit Portal Overview

Applications

The Applications page includes a record of all your current and historical applications.

Enter any application information (e.g., application ID or name) and click SEARCH to find an application.

You can filter your application list using the drop-down menus.

Click an application ID to open the application.

Click any header to sort your applications by that criteria.

The status of each application is displayed.
Project Applications
Creating an Application

The Applicant or Applicant Representative creates the application.

Beginning the Application (as an Applicant)

01 Click **BEGIN NEW APPLICATION**.

This step creates a new application to be completed and brings you to the application main page.

If you want to assign the application to an Applicant Representative to complete, continue to p. 21.

02 Click **Complete the Application Myself**.

This step creates a new application to be completed and brings you to the application main page.
Creating an Application

Beginning the Application (as an Applicant)

- You can access any section of the application from the main page.
- The project phase is displayed in the progress bar.
- This section is where you add and manage project facilities.
- This section summarizes Applicant information.
- This section summarizes energy, incentive and demand information for the project.
- This section is where you provide basic project information.
- This section summarizes Applicant Representative information.

Continue to **Reviewing Applicant Details** on p. 25.
Creating an Application

Beginning the Application (as an Applicant)

Assigning an Application to an Applicant Representative

The Applicant can assign an Applicant Representative to complete an application on their behalf.

01 Click BEGIN NEW APPLICATION.

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

Beginning the Application (as an Applicant)

Assigning an Application to an Applicant Representative

03 Enter the Applicant Representative’s email address.

04 Click SEARCH.

05 Click SEND TO APP REP.

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

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

Beginning the Application (as an Applicant Representative)

01 Click **BEGIN NEW APPLICATION**.

02 Enter the Applicant’s email address.

03 Click **SEARCH**.

The Applicant’s name will appear if they are registered for the Retrofit program.

04 Click **COMPLETE THE APPLICATION MYSELF**.

This step creates a new application to be completed and brings you to the application main page.
Creating an Application

Beginning the Application (as an Applicant Representative)

You can access any section of the application from the main page.

The project phase is displayed in the progress bar.

This section is where you add and manage project facilities.

This section summarizes Applicant information.

This section summarizes energy, incentive and demand information for the project.

This section is where you provide basic project information.

This section summarizes Applicant Representative information.

Continue to Reviewing Applicant Details on p. 25.
Creating an Application

Reviewing Applicant Details

The Applicant Details section is automatically populated based on the Applicant’s Retrofit program profile.

Review the mandatory fields in this section and make any required updates.

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

Adding Basic Project Details

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

- Enter a project name.
- Select whether you have received other financial incentives for the project.
- If you are receiving other financial incentives, you must provide funding information.
- Enter a project description.

Project Applications: Creating an Application
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 add and manage custom measures for the facility.
- This section is where you add and manage prescriptive measures for the facility.
- This section is where you upload documents for the facility.
Creating an Application

Adding Facilities

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

- Enter the facility name.
- Select the facility type.
- Select the ownership type.
- Enter the facility address, including the city, province and postal code.
- Enter a project description.
- Select an estimated project start and end date.
- Enter the electric utility account.
Creating an Application

Adding Facilities

**Note:** If you want to reuse a facility from a previous application, you can add the existing facility with the basic details already populated.

Click **Find Existing Facility**.

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

Click **SEARCH**.

Select the facility from the facilities list.

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

This opens a new prescriptive measure to be completed.

---

**Project Applications:** Creating an Application
Creating an Application

Adding Facilities

04 Complete the mandatory fields in the **Basic Details** section for the prescriptive measure.

- Select the measure category.
- Select the end use.
- Select the conservation measure name.
- Select the conservation measure description.
- Enter the manufacturer name.
- Enter the estimated quantity.

These values are automatically calculated when you select the conservation measure description.

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

Enter the model number.

Click **SAVE TO DRAFT** if you want to save a draft of the measure.

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

---

**Project Applications**: Creating an Application 30
Creating an Application

Adding Facilities

The measure will now appear in the prescriptive measures summary on the facility main page.

The measure status is complete.

**Note:** If you save a draft of the measure without submitting it, the status will appear as **incomplete**. The facility cannot be submitted until all measures are **complete**.

06 Repeat steps 3–5 until you have added all the prescriptive measures you want to add.
Creating an Application

Adding Facilities

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

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

08 Click **RECALCULATE**.

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

This opens a new custom measure to be completed.
Creating an Application

Adding Facilities

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

- Enter the measure name.
- Select the measure category.
- Enter the base case description.
- Enter the energy efficient case description.
- Enter the model number.
- Enter the manufacturer.
Creating an Application

Adding Facilities

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

- Enter the estimated base case consumption.
- Enter the estimated energy efficient case consumption.
- Enter the estimated base case demand.
- Enter the estimated energy efficient case demand.

12 Click APPLY to add the measure to the facility.

Enter the estimated custom measure installation cost.

Enter the estimated equipment cost.

The estimated consumption savings is automatically calculated based on the consumption estimates.

The estimated demand reduction and incentive amount are automatically calculated based on the demand estimate.

Click SAVE TO DRAFT if you want to save a draft of the measure.
Creating an Application

Adding Facilities

The measure will now appear in the custom measures summary on the facility main page.

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.
Creating an Application

Adding Facilities

1. Double-click the document you want to attach.

The document will now appear in the facility document summary.

- Click here to delete the document.
- Click here to add another document if required.
- The creation user and creation date fields are automatically populated after you exit and re-enter this section.
Creating an Application

Adding Facilities

16 Review the **Estimated Calculation Results** section on the facility main page.

17 Click **APPLY** to add the facility to the application.

---

**Estimated Calculation Results**

<table>
<thead>
<tr>
<th></th>
<th>Estimated Eligible Costs</th>
<th>Estimated Energy Savings (kWh)</th>
<th>Estimated Demand Reduction (kW)</th>
<th>Estimated Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescriptive</td>
<td>$42,000.00</td>
<td>193,419.600</td>
<td>44.31</td>
<td>$78,000.00</td>
</tr>
<tr>
<td>Custom</td>
<td>$1,200,000.00</td>
<td>4,003,001.00</td>
<td>500.00</td>
<td>$203,000.05</td>
</tr>
<tr>
<td>Total</td>
<td>$1,242,000.00</td>
<td>4,196,419.600</td>
<td>544.31</td>
<td>$281,000.05</td>
</tr>
</tbody>
</table>

Note: Incentives will be capped based on the Retrofit Program Rules.

---

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.

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.

02 Click DUPLICATE FACILITY.

---

### Manage Facilities

<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Address 1</th>
<th>City</th>
<th>Estimated Facility Capped Incentive Amount</th>
<th>Project Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>IEGO Adelaide</td>
<td>120 Adelaide St</td>
<td>Toronto</td>
<td>$235,036.35</td>
<td>Example</td>
<td>Complete</td>
</tr>
</tbody>
</table>

### Estimated Calculation Results

<table>
<thead>
<tr>
<th>Prescriptive</th>
<th>Estimated Eligible Costs</th>
<th>Estimated Energy Savings (kWh)</th>
<th>Estimated Demand Reduction (kW)</th>
<th>Estimated Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescriptive</td>
<td>$42,000.00</td>
<td>190,413.90</td>
<td>44.200</td>
<td>$35,000.00</td>
</tr>
<tr>
<td>Custom</td>
<td>$1,260,000.00</td>
<td>4,000,000.00</td>
<td>500.000</td>
<td>$200,000.05</td>
</tr>
<tr>
<td>Total</td>
<td>$1,242,000.00</td>
<td>4,190,414.90</td>
<td>544.200</td>
<td>$235,036.35</td>
</tr>
</tbody>
</table>

Note: Incentives will be capped based on the Retrofit Program Rules.

CANCEL DELETE DUPLICATE FACILITY SAVE TO DRAFT APPLY
Creating an Application

Adding Facilities

Duplicating a Facility

03 Click YES.

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

04 Click CANCEL to exit the existing facility.

05 Refresh the page after approximately thirty seconds.

The duplicated facility will now appear in the application facility list.

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

Note: The duplicated facility’s status will be incomplete. You must complete the facility in order to submit the application.
Creating an Application

Reviewing Estimated Calculation Results

Review the Estimated Calculation Results section for your application once you have added all your facilities.

The application is now ready to be submitted.

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

If you’re an Applicant Representative you must forward the application to the Applicant. Continue to Forwarding the Application to the Applicant on p. 42.
Creating an Application

Forwarding the Application to the Applicant

01 Enter a comment.

02 Click SUBMIT TO APPLICANT.

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

Submitting the Application

Only the Applicant can submit the application to the Save on Energy Analyst.

If you created the application, continue to step 6.

If an Applicant Representative created the application, you will receive an email notification to edit the application. Locate the application ID in the notification email and continue to step 1.

01 Click PENDING ACTIONS.

02 Enter the application ID.

03 Click RESET.

04 Click Edit Pre-Project Application “Project ID: Project Name”.
Creating an Application

Submitting the Application

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

06 Enter a comment.

07 Click SUBMIT.

If the application was completed by an Applicant Representative, you can click SEND TO APP REP to return the application to them, if required.

08 Select Yes to indicate that all the information in the application is correct and to indicate that you have read and agree to the participant agreement.

09 Click SUBMIT.
Creating an Application

Submitting the Application

The Save on Energy Analyst will now receive an email notification to review the application, and you will receive a notification that your application has been submitted.

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.

05 Click Related Actions.

06 Click Recall Application.

Project Applications: Recalling an Application
Recalling an Application

07 Click **SUBMIT**.

Note: If the Save on Energy Analyst has started reviewing the application, you will receive an error message stating that you cannot recall the application. If edits are required, contact the Save on Energy Analyst to open the application for edits.

08 Click **YES**.

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.

05 Click **DELETE**.

06 Click **DELETE APPLICATION**.

**DELETE APPLICATION**

Continuing will delete your application/submission and all related facilities and measures. You will not be able to recover this application. Please confirm that you wish to delete this application.

- **DO NOT DELETE APPLICATION**
- **DELETE APPLICATION**
Copy an Application

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

01 Click APPLICATIONS.

02 Enter the application ID.

03 Click SEARCH.

04 Click the application ID.

05 Click Related Actions.

06 Click Copy Application.

07 Click YES.

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

Note: The application that is being copied remains unchanged.
Responding to Save on Energy Analyst Edit Requests

Editing an Application

The Save on Energy Analyst may return an application with recommended edits. The Applicant or Applicant Representative makes the required changes. You will receive an email notification to edit the application. Locate the application ID in the notification email and continue to step 1.

01 Click APPLICATIONS.

02 Enter the application ID.

03 Click SEARCH.

04 Click the application ID.

05 Click History and Comments to review any Save on Energy Analyst comments.

The Recommend Edits action indicates that the Save on Energy Analyst has suggested edits.

The required edits are described in the Comment column.
Responding to Save on Energy Analyst Edit Requests

Editing an Application

06 Click EDIT RETURNED APPLICATION.

07 Make the required edits to the application.

08 Enter a comment.

09 Click SUBMIT.

10 Select Yes to indicate that all the information in the application is correct and to indicate that you have read and agree to the participant agreement.

11 Click SUBMIT.

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

Approving an Edited Application

The Save on Energy Analyst may edit the application during the review process, rather than returning it to be edited. When a Save on Energy Analyst edits the application, it is returned to the Applicant for review. The Applicant reviews the changes made by the Save on Energy Analyst. They can either accept all changes or reject all changes (they cannot pick which ones to accept or reject—it is all or nothing).

01 Click APPLICATIONS.

02 Click the application ID.

03 Click SEARCH.

04 Click the application ID.
Responding to Save on Energy Analyst Edit Requests

Approving an Edited Application

05 Click **History and Comments** to review any Save on Energy Analyst comments.

The **Recommended Edits** action indicates that the Save on Energy Analyst edited the application. The edits made by 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.

06 Review the changes made by the Save on Energy Analyst.
Responding to Save on Energy Analyst Edit Requests

Approving an Edited Application

07 Click EDIT RETURNED APPLICATION.

08 Click SUBMIT.

09 Select Yes to indicate that all the information in the application is correct and to indicate that you have read and agree to the participant agreement.

10 Click SUBMIT.

The application will now be forwarded to the Save on Energy Analyst for review.
Submitting an Advance Incentive Request

The Applicant or Applicant Representative can submit an advance incentive request if the project meets the advance incentive criteria. An advance incentive request is approved as part of the initial application, not after the application is approved.

Applying for a Social Housing Incentive

You can apply for a social housing incentive if your project includes a social housing facility.

01 Select Multi-Residential - Social Housing Provider when completing the Basic Details section for the facility.

02 Select Y.

03 Enter the percentage of the incentive you want to receive in advance. The maximum is 50%.
Submitting an Advance Incentive Request

Applying for a Social Housing Incentive

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.

<table>
<thead>
<tr>
<th>Category *</th>
</tr>
</thead>
<tbody>
<tr>
<td>M&amp;T</td>
</tr>
</tbody>
</table>

02 Select Yes.

<table>
<thead>
<tr>
<th>M&amp;T Advance Incentive Requested</th>
<th>Maximum M&amp;T Advance Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>$0</td>
</tr>
</tbody>
</table>
Submitting an Advance Incentive Request

Applying for a Monitoring and Targeting Incentive

03 Complete the mandatory fields in the Other Details section.

04 Click APPLY to add the measure to the facility.

When you submit the measure, the value of the M&T advance incentive is automatically calculated. The amount will be a maximum of 35% of your calculated incentive, subject to your Save on Energy Analyst’s approval.

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

The application will now include the request for an M&T advance incentive.
Submitting an Advance Incentive Invoice

The **Applicant** or **Applicant Representative** can submit an advance incentive invoice, if applicable, once the advance incentive is approved.

**Note:** A final incentive invoice may only be submitted when the Save on Energy Analyst has requested one.

01 Click **APPLICATIONS**.

02 Enter the application ID.

03 Click **SEARCH**.

04 Click the application ID.

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

This is the maximum amount you can submit an invoice for.
Submitting an Advance Incentive Invoice

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

07 Click **UPLOAD**.

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

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

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

10 Click **SUBMIT**.

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

The Applicant or Applicant Representative can amend an application after it has been approved by the Save on Energy Analyst.

Note: Once a post-project submission has been started, the pre-project application cannot be amended.

01 Click APPLICATIONS.

02 Enter the application ID.

03 Click SEARCH.

04 Click the application ID.

Project Applications: Amending an Approved Application
Amending an Approved Application

05 Click Related Actions.

Retrofit Application: Acme Retrofit Lighting

- **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.

08 Click INITIATE.
Amending an Approved Application

09 Click YES.

10 Make any required changes to the application.

11 Enter a comment.

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

13 Click SUBMIT.
Amending an Approved Application

**Note:** Only an Applicant can submit the application. If an Applicant Representative amends the application, they must forward it to the Applicant, who submits it to the Save on Energy Analyst.

Enter a comment if required.

Click **SUBMIT TO APPLICANT**.

The Applicant will receive an email notification to review and submit the application.

14 Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agree to the participant agreement.

**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.

<table>
<thead>
<tr>
<th>PRIOR TO Commencing your Project(s)</th>
<th>AFTER Completing your Project(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure that the LDC has pre-approved this Application and your Participant Agreement</td>
<td>You must submit evidence of Project completion in order to receive your Participant incentive</td>
</tr>
</tbody>
</table>

I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. *

- [ ] Yes
- [ ] No

I have read and agree to the Participant Agreement. *

- [ ] Yes
- [ ] No

From now on all communication for this application should go to my App Rep.

- [ ] Yes
- [ ] No

**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.

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

03 Click the application ID.

04 Click PREPARE POST-PROJECT SUBMISSION.

05 Click CONTINUE TO APPLICATION.

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

Entering Project Data

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

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

The estimated project start date and end date from the application are provided.

**Note:** As you enter and submit data there are a variety of validations that are applied to ensure data integrity.
Creating a Post-Project Submission

Entering Project Data

03 Click the green arrow to open a prescriptive measure. If the facility does not include any prescriptive measures, continue to step 10.

<table>
<thead>
<tr>
<th>Prescriptive Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated?</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

04 Enter the actual quantity for the measure.

05 Update any other mandatory fields as required.

The estimated value from the application is provided.

These values are automatically calculated when you enter the actual quantity.
Creating a Post-Project Submission

Entering Project Data

06 Click APPLY to add the measure to the facility.

Click SAVE TO DRAFT if you want to save a draft of the measure.

07 Repeat steps 3–6 until you have entered the actual quantity for all prescriptive measures for the facility.

08 Enter the actual facility cost for all prescriptive measures. The RECALCULATE button will now appear.

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.

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.

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.

```
<table>
<thead>
<tr>
<th></th>
<th>Actual Eligible Costs</th>
<th>Actual Energy Savings (kWh)</th>
<th>Actual Demand Reduction (kW)</th>
<th>Actual Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescriptive</td>
<td>$0.00</td>
<td>0.000</td>
<td>0.000</td>
<td>$0.00</td>
</tr>
<tr>
<td>Custom</td>
<td>$750,000.00</td>
<td>150,000,000.00</td>
<td>0.000</td>
<td>$375,000.00</td>
</tr>
<tr>
<td>Total</td>
<td>$750,000.00</td>
<td>150,000,000.00</td>
<td>0.000</td>
<td>$660,000.00</td>
</tr>
</tbody>
</table>
```

15 Click APPLY to add the facility to the application.

16 Repeat steps 1–15 as required if your project includes more than one facility.

The post-project submission is now ready to be submitted.

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

If you’re an Applicant, continue to Submitting the Post-Project Submission on p. 74.
Creating a Post-Project Submission

Forwarding the Post-Project Submission to the Applicant

01. Enter a comment.

02. Click **SUBMIT TO APPLICANT**.

The Applicant will receive an email notification to review the post-project submission.
Creating a Post-Project Submission

Submitting the Post-Project Submission

Only the **Applicant** can submit the post-project submission to the Save on Energy Analyst.

If you created the post-project submission, continue to **step 6**.

If an **Applicant Representative** created the post-project submission, you will receive an email notification to review the post-project submission. You must review it before it can be submitted. Continue to **step 1**.

01 Click **PENDING ACTIONS**.

02 Enter the application ID.

03 Click **RESET**.
Creating a Post-Project Submission

Submitting the Post-Project Submission

04 Click Review Post-Project Application “Project ID: Project Name”.

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

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

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

07 Click SUBMIT.
Creating a Post-Project Submission

Submitting the Post-Project Submission

08 Select Yes to indicate that all the information in the post-project submission is correct and to indicate that you have read and agree to the participant agreement.

Application Approval

You have now reached the final stage before your RERIGHT 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. *

☑ Yes
☐ No

I have read and agree to the Participant Agreement. *

☑ Yes
☐ No

From now all communication for this application should go to my App Rep.

☐ Yes
☐ No

09 Click SUBMIT.

The Save on Energy Analyst will now receive an email notification to review the post-project submission.
Creating a Post-Project Submission

Submitting the Post-Project Submission

**Note:** After you have submitted your post-project submission, you have the option of viewing the current or pre-approved version of the application.
Submitting an Invoice

The Applicant submits the invoice once the post-project submission has been approved by the Save on Energy Analyst.

Note: A final incentive invoice may only be submitted when the Save on Energy Analyst has requested one. You will receive an email notification to edit the application. Locate the application ID in the notification email and continue to step 1.

01 Click APPLICATIONS.

02 Enter the application ID.

03 Click SEARCH.

04 Click the application ID.

05 Click SUBMIT/EDIT FINAL INVOICE.

Retrofit Application: Acme Retrofit
Submitting an Invoice

06 Click **UPLOAD**.

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

<table>
<thead>
<tr>
<th>Application Invoice Submission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Amount</td>
</tr>
<tr>
<td>$1,025.00</td>
</tr>
<tr>
<td>Multi Site Demonstration</td>
</tr>
<tr>
<td>Comment</td>
</tr>
</tbody>
</table>

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.
Project Applications:
Submitting an Invoice