SAVE ON ENERGY™
POWER WHAT'S NEXT

RETROFIT PROGRAM

DIGITAL USER GUIDE:

FOR APPLICANTS AND APPLICANT REPRESENTATIVES

April 2022

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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	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. They also accept the terms and conditions of the Participant Agreement when they submit their application. **Only the Applicant can submit applications or post-project submissions.**
Applicant Representative (App Rep)	An Applicant Representative is an *optional* proxy who creates or assists with the application and post-project submission on the Applicant's behalf. **An Applicant Representative cannot submit applications or post-project submissions.**
Save on Energy Service Provider Analyst	The Save on Energy Service Provider Analyst manages Retrofit projects for the IESO. This role is sometimes also referred to as **Save on Energy Representative** or **Technical Reviewer**. They review and provide final approval on all applications and post-project submissions.

RETROFIT PROGRAM PROCESS

To receive a project incentive through the Retrofit program, an applicant will go through **three steps**.

First, the **pre-project application** is submitted by the applicant, via the Retrofit portal, to the Save on Energy Technical Reviewer to be reviewed.

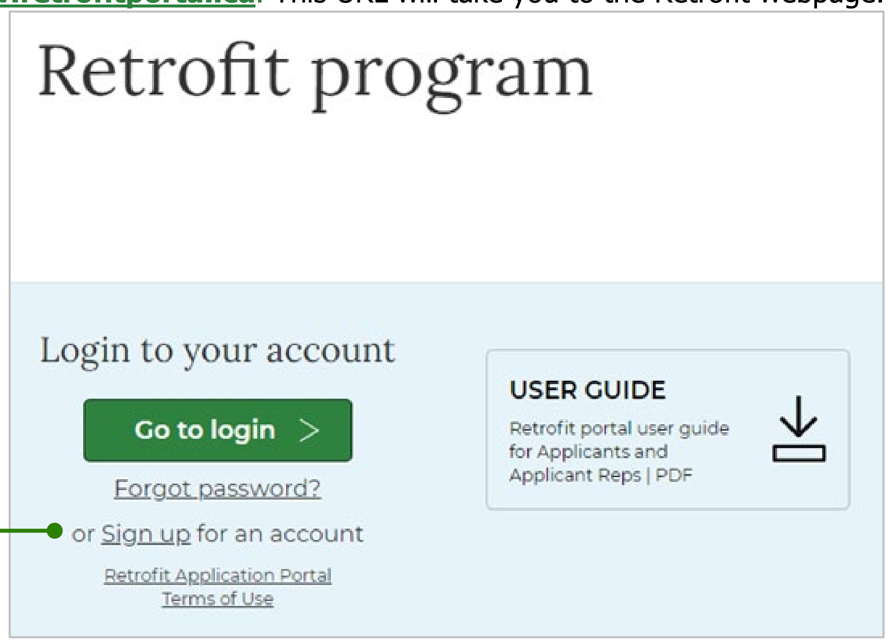
Once the project is pre-approved and the energy-efficiency project work is completed, a **post-project submission** is submitted to the Save on Energy Technical Reviewer for review.

Once the application is post-project approved an invoice is submitted via the Retrofit portal, the savings can be claimed and the project **incentive is issued.**

REGISTERING FOR THE RETROFIT PROGRAM

As a new **Applicant** or **Applicant Representative** you will need to register for a Save on Energy Retrofit account.

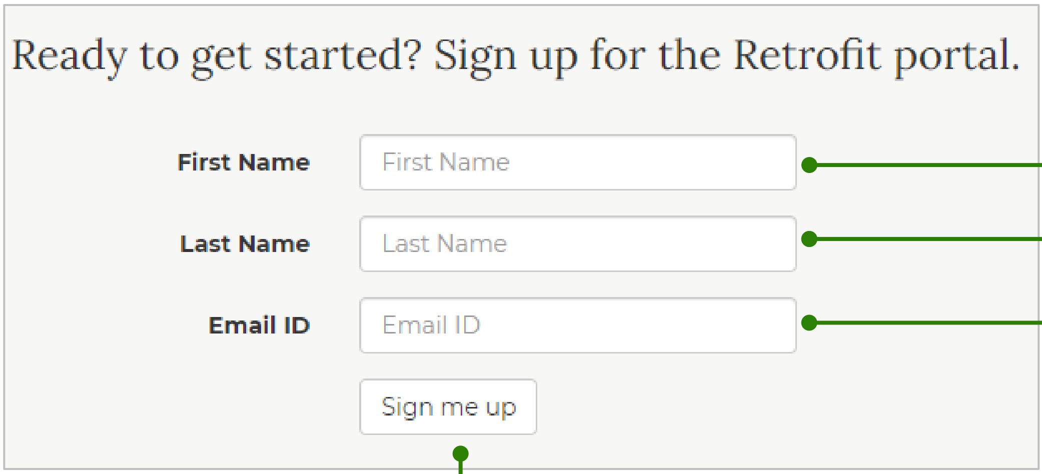
01 Open www.retrofitportal.ca. This URL will take you to the Retrofit webpage.



02 Click **Sign Up** for an account.

REGISTERING FOR THE RETROFIT PROGRAM

03 Enter your **first** and **last name** and **email address**.



04 Click **Sign Me Up**.

05 Retrieve the email that will be automatically sent from noreply@ieso.ca.

> **Note:** If you don't see the email in your inbox, try checking your junk or spam folder.

REGISTERING FOR THE RETROFIT PROGRAM

06 In the email from **noreply@ieso.ca** click **Activate Account**.

Dear Frank,

The IESO is using Okta to manage their web applications. This means you can conveniently access all the applications you normally use, through a single, secure home page; otherwise known as the IESO Gateway.

The IESO has created an account for you.

Your unique username is: **example@bellnet.ca**

****Please be sure to note this down as you will be using it to login to IESO Gateway going forward.**

Click the **'Activate Account'** button below to complete the set-up of your account.

Activate Account

Or copy and paste the below link into your browser:

https://gateway.ieso.ca/welcome/wXwnfikF47RgwzaEARIN

Please note, this link expires in 90 days.

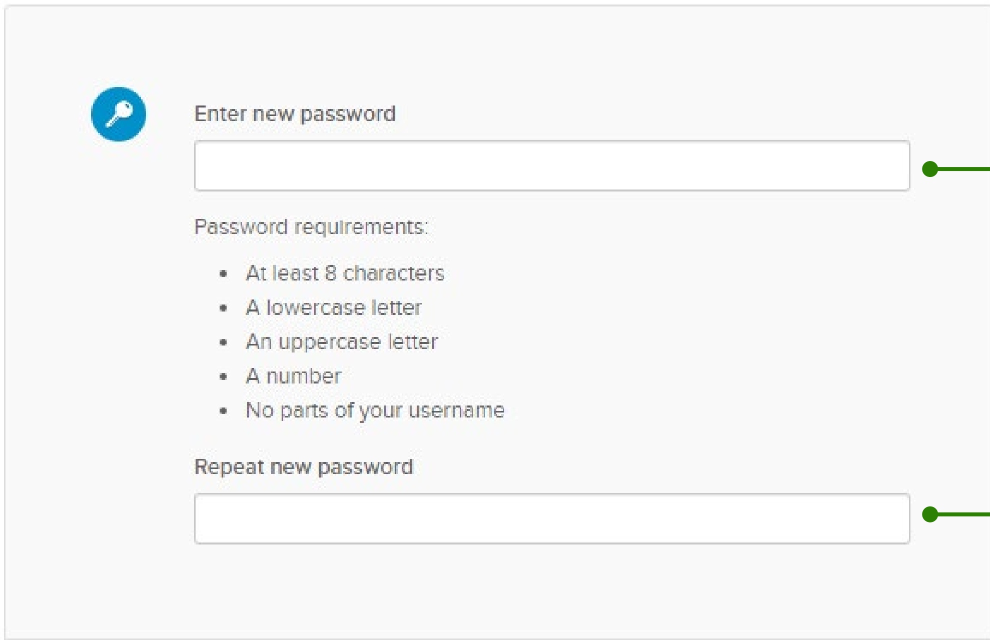
What happens when I click on the account activation button?
You will be directed to the account set up page where you will finalize your account details. This includes setting a new password and multifactor options for your account. Once completed, you will be able to access your IESO Gateway applications.

If you experience difficulties completing your activation, please don't hesitate to contact us.

This is an automatically generated message. Replies are not monitored or answered.

REGISTERING FOR THE RETROFIT PROGRAM

07 Enter a **password**, repeat this password.


Enter new password

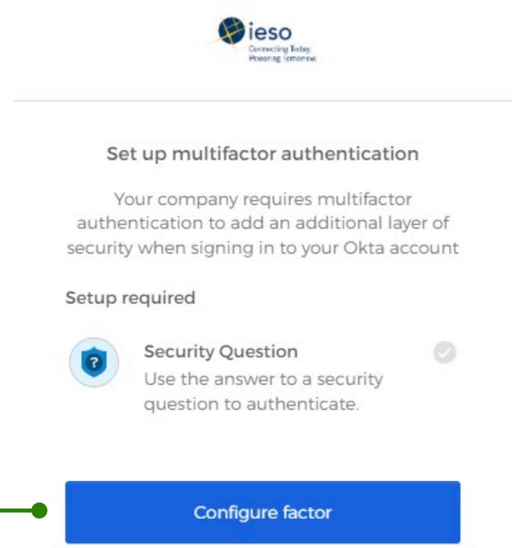
Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username

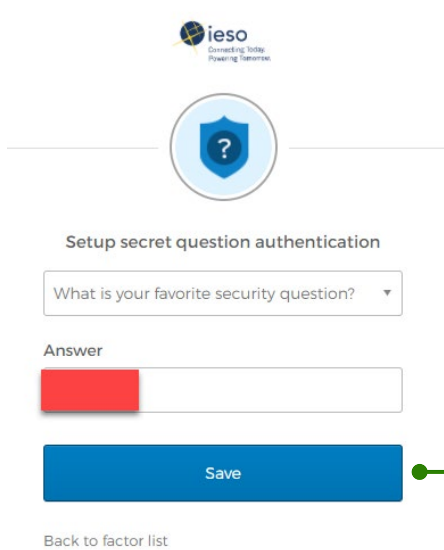
Repeat new password

REGISTERING FOR THE RETROFIT PROGRAM

08 Configure your required Multifactor Authentication (MFA) Option by clicking on **Configure Factor**.

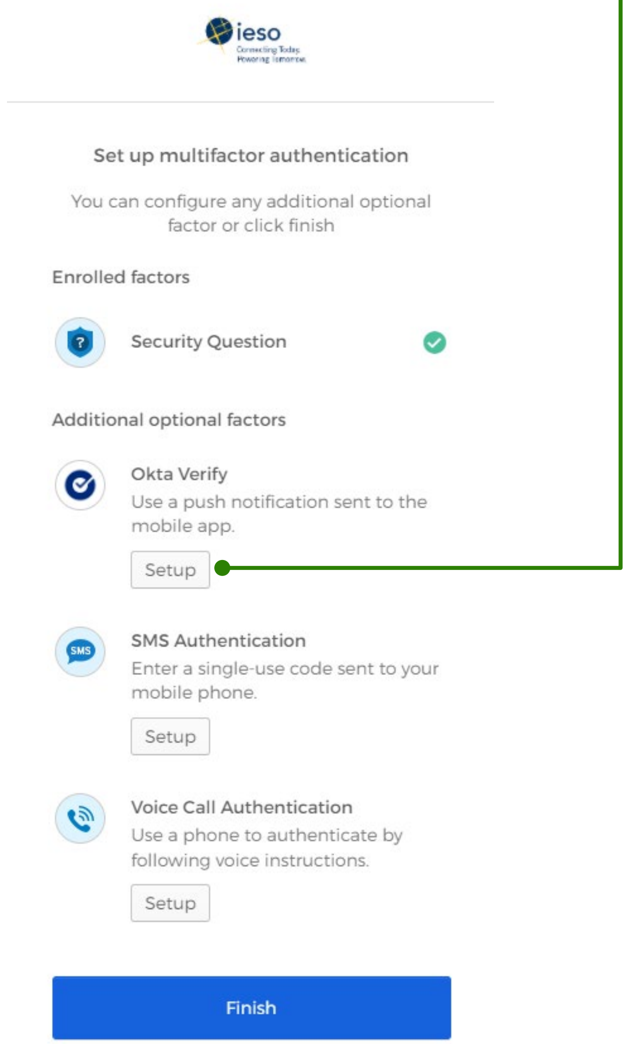


09 Choose a secret question and type an answer to it, then click on **Save**. Please note that answers are case sensitive.



REGISTERING FOR THE RETROFIT PROGRAM

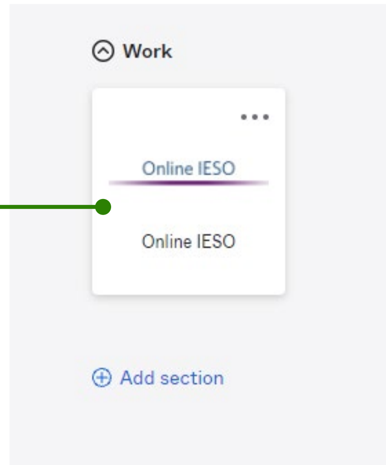
10 *OPTIONAL* - Configure additional factors, such as Okta Verify, SMS Authentication, or Voice Call Authentication, by clicking on the "**Setup**" button under the desired factor.



REGISTERING FOR THE RETROFIT PROGRAM

11 Once MFA factors are created, click on the **Finish** button to be directed to the list of systems to which you have acess. They are presented by tiles, e.g., **Online IESO**.

12 Click **Online IESO**.



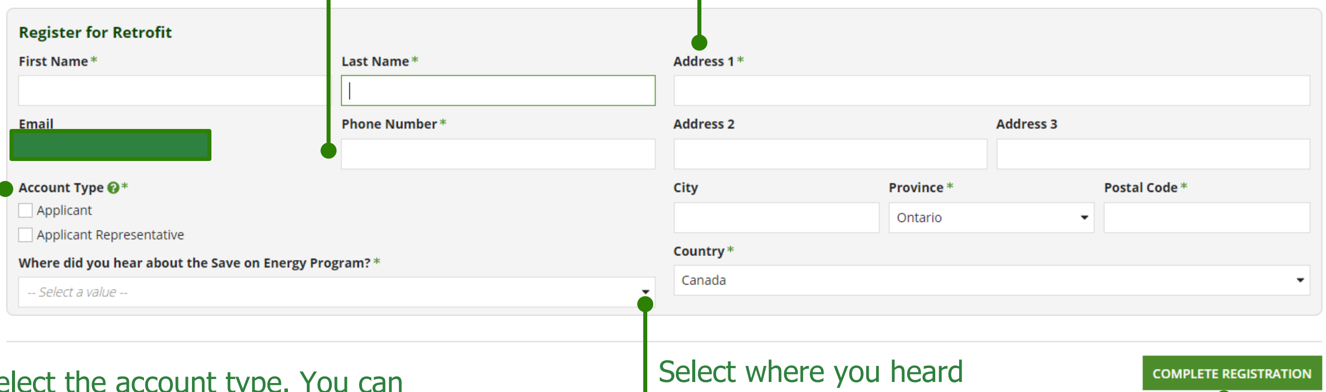
13 Click **Register for Retrofit**.

REGISTERING FOR THE RETROFIT PROGRAM

14 Complete the mandatory fields in the **Retrofit Registration**.

Enter a contact number.

Complete the address section.

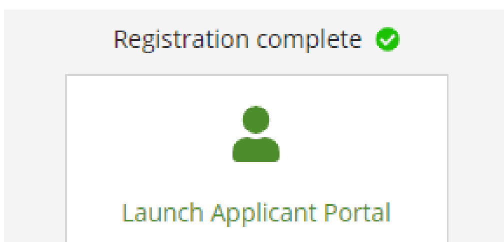


Select the account type. You can choose Applicant, Applicant Rep, or both.

Select where you heard about the program.

15 Click **Complete Registration**.

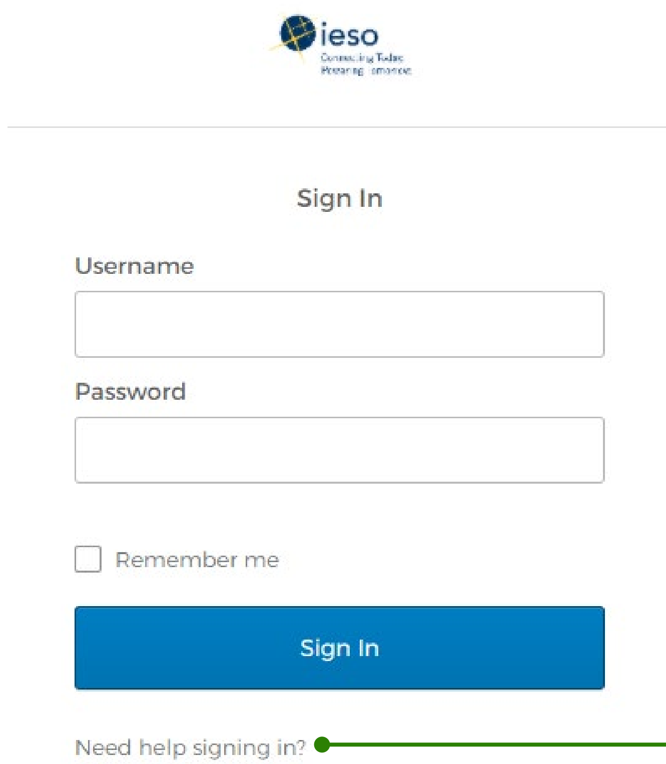
16 Click **Launch Applicant Portal**. **This opens up the portal and your Save on Energy Retrofit program registration is now complete**.



SELF-SERVICE PASSWORD RESET

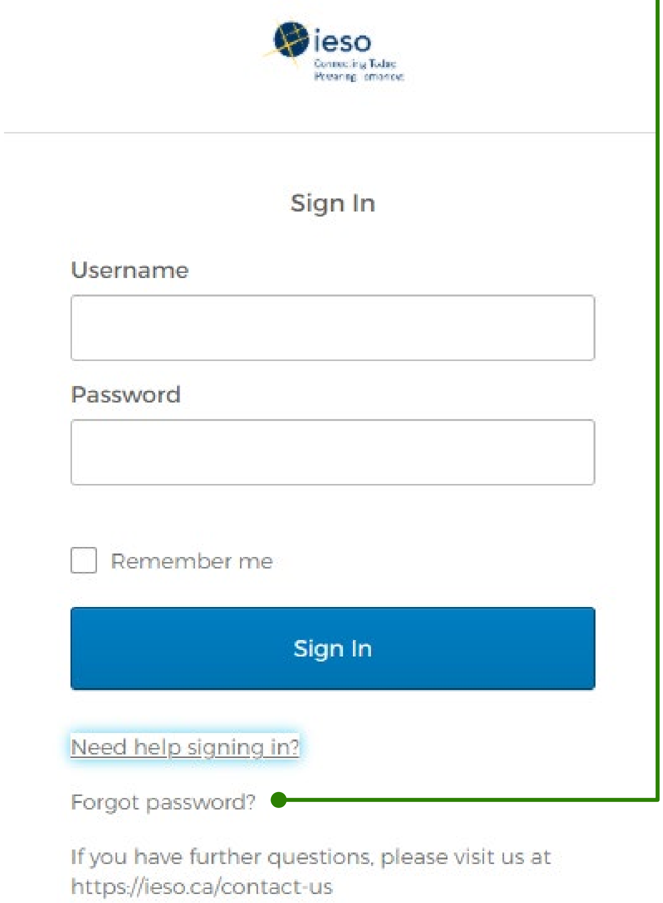
If all requirements beginning on page 6 are in place and you are still having issues logging in, you can reset your password using the **Self-Service password reset**.

01 Under the **Sign In** button, click on **Need help signing in?**



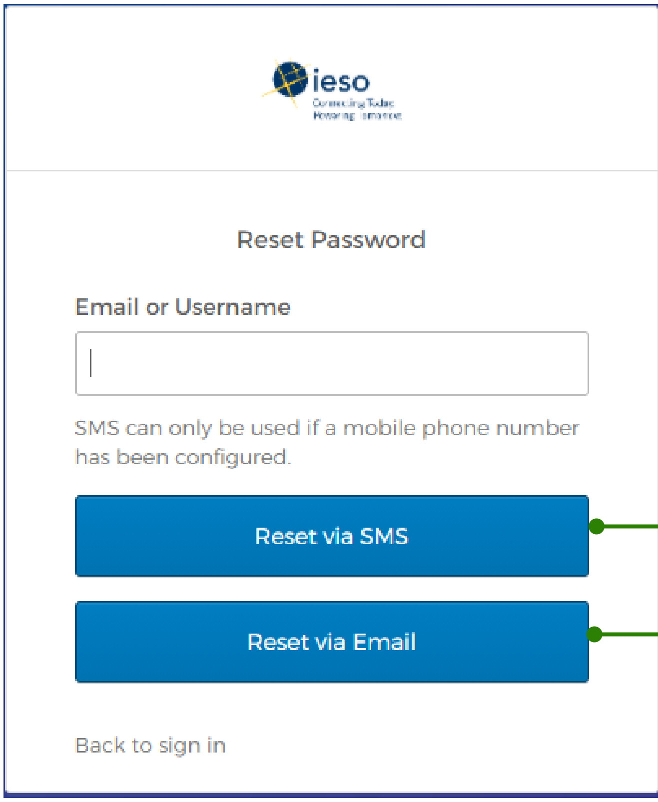
SELF-SERVICE PASSWORD RESET

02 Click on **Forgot Password?**



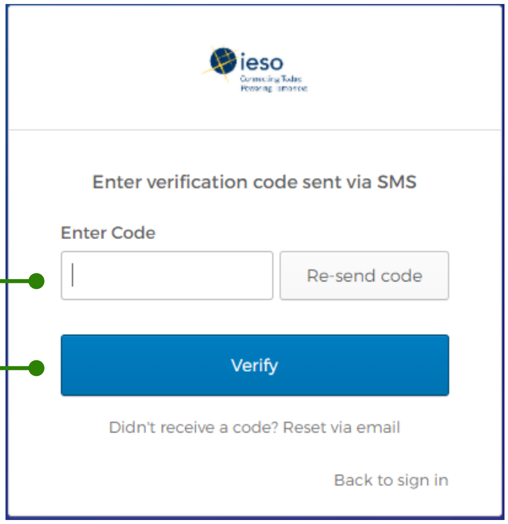
SELF-SERVICE PASSWORD RESET

03 Enter your email address and choose how you wish to reset your password by clicking on either **Reset Via SMS** or **Reset via Email**.



SELF-SERVICE PASSWORD RESET

04 If you selected **Reset Via SMS**, enter the verification code sent by text message and click **Verify**.



Note: If you do not receive the SMS verification code via text message, select **Reset Via Email**.

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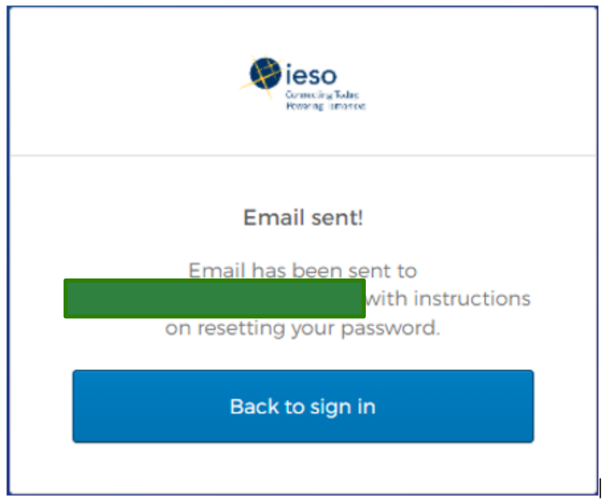
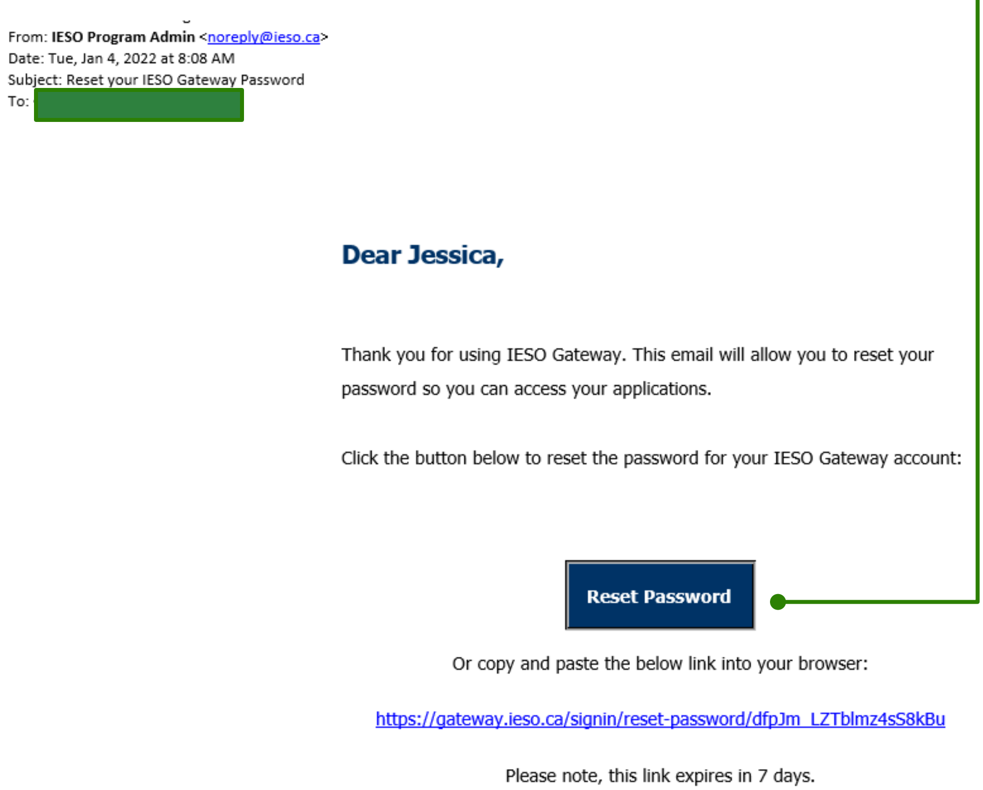
SELF-SERVICE PASSWORD RESET

05 If you selected **Reset via Email**, retrieve the email.

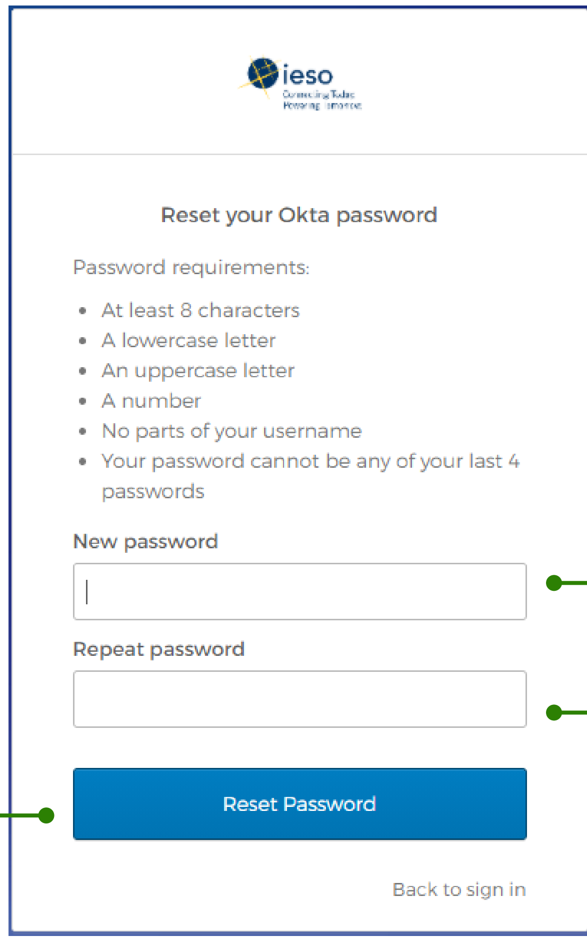


06 From the email from **noreply@ieso.ca** with the subject: **Reset your IESO Gateway Password**, click **Reset Password**.



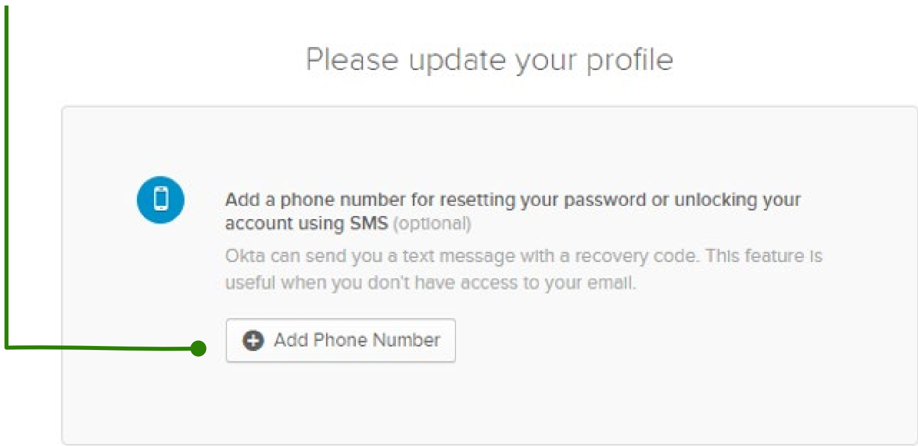
SELF-SERVICE PASSWORD RESET

07 Reset your password by entering **a new password** and then re-entering the password. Click **Reset Password**.



SELF-SERVICE PASSWORD RESET

08 If you have not added a phone number, you will be prompted to **update your profile**. Click **Add Phone Number**.



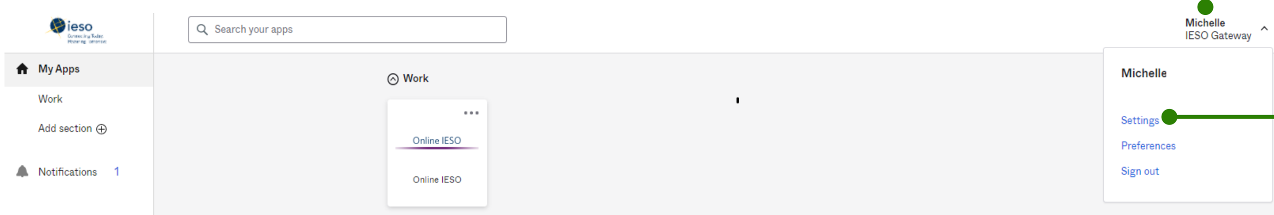
Note: If you are still having issues or receive an error trying to reset your password, please contact Retrofit Support Services at **1-844-303-5542** or **retrofit@ieso.ca**.

UPDATING SECURITY OPTIONS

To update your **password** or **security question**, follow the steps below.

01 Log in at https://gateway.ieso.ca

02 Click on **your name** in the upper right corner and click on **Settings**.

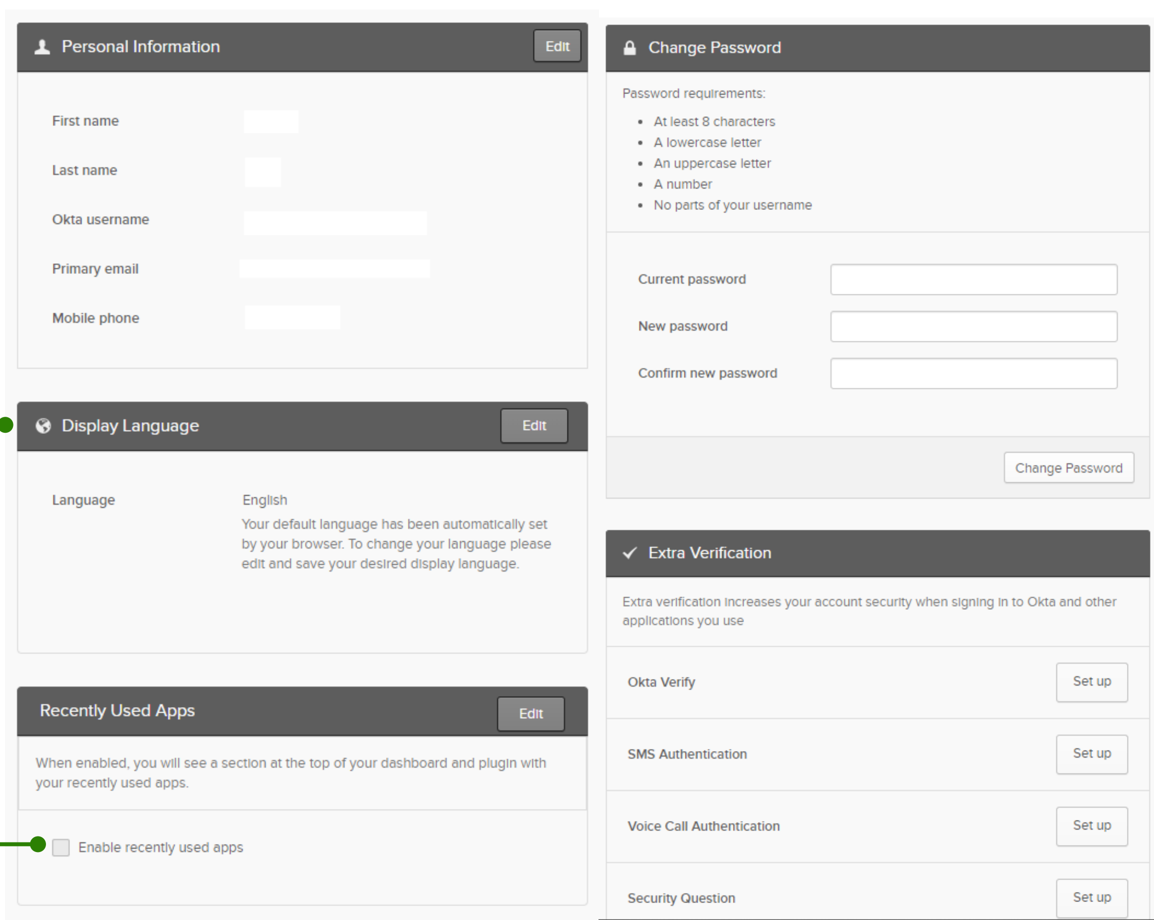


From here you can **change your password** and update **security** and **language** options.

Update your **first** and **last name, primary email** and **mobile phone.**

Update your **Display Language.**

Click here to enable **Recently Used Apps.**



Update your password to a new password.

Add **Extra Verification** for a more secure log-in.

Portal Overview

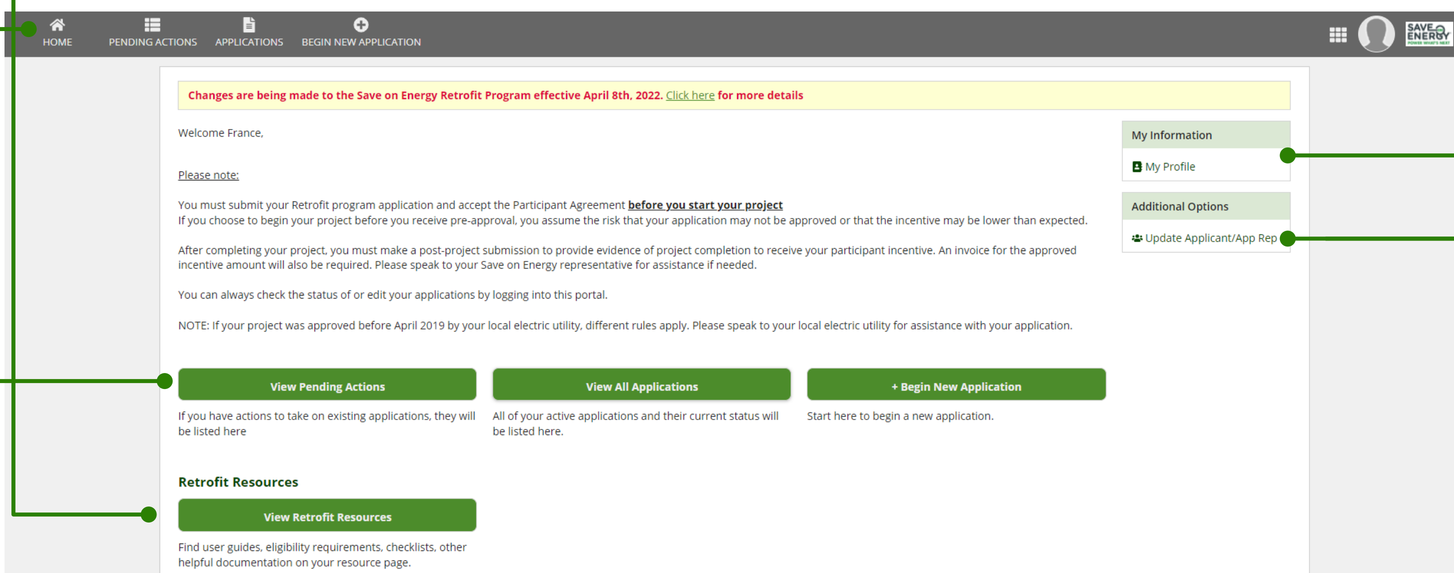
RETROFIT PORTAL OVERVIEW

HOME

When you log in to the portal, you will arrive at the **Retrofit portal Home page** where your **menu buttons** are at the top of the page to **begin**, **view** and **edit** your applications. You can also use the **buttons** in the middle of the home page to **begin**, **view** and **edit** your applications.

You can access your **profile settings** and **update the applicant or app rep roles for your application(s)** using the links on the right side of the Home page.

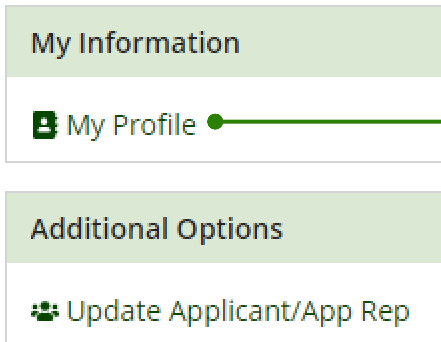
You can access additional **program resources** from your Portal Account on the Home page to help guide you through the Retrofit program. Please refer to these whenever necessary.



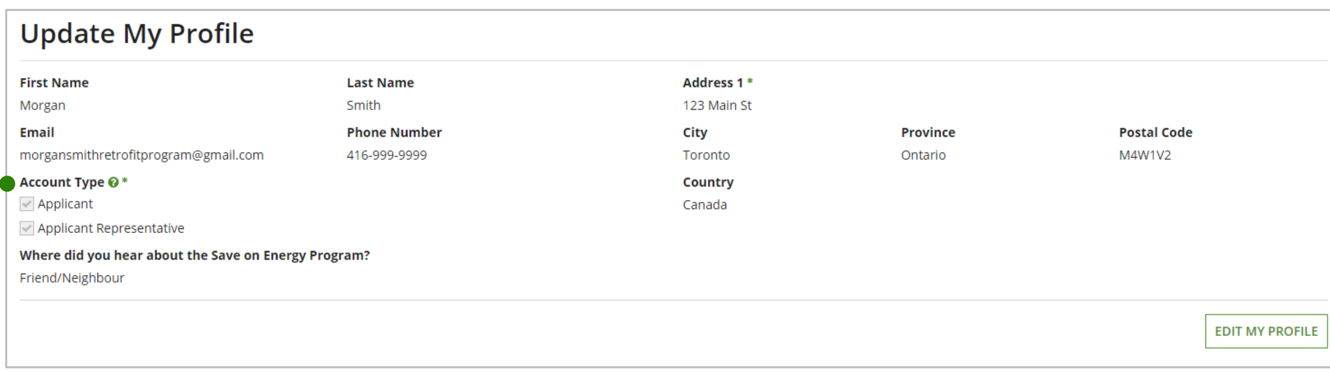
HOME

1. **My Profile** allows you to update your contact information and your Account Type (Applicant / App Rep / both).

01 Click on **My Profile** under **My Information** on the right-side menu.



02 Click **Edit My Profile**



03 Check off Applicant, Applicant Representative, or both. Click **Save Changes**.

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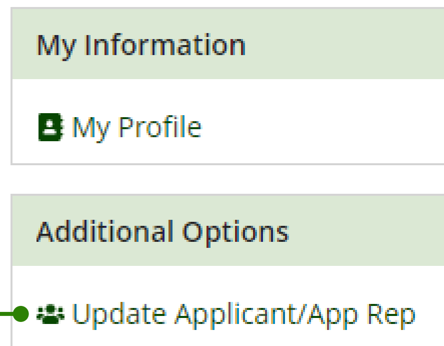
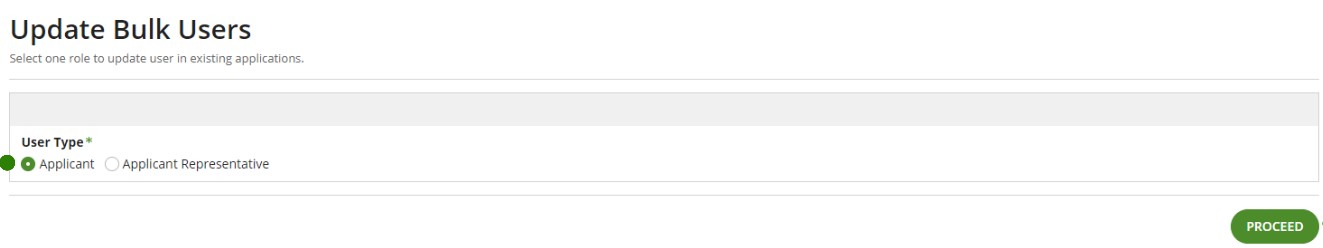
HOME

AS AN APPLICANT – UPDATE THE APPLICANT FOR MY APPLICATIONS

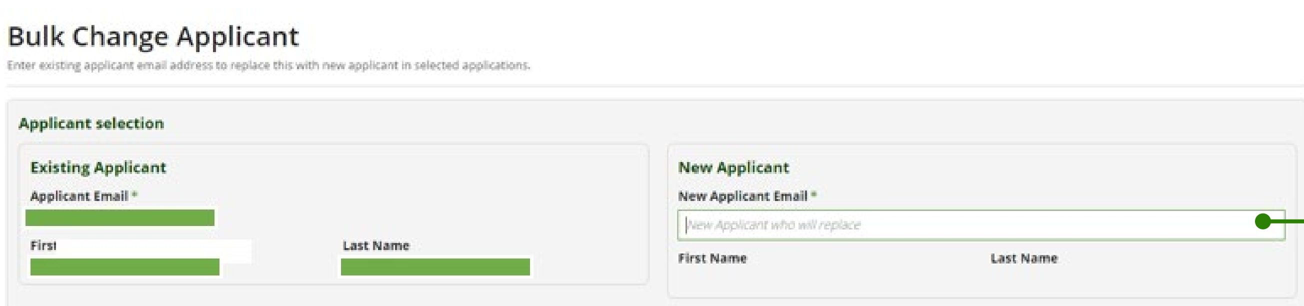
01 Click on **Update Applicant/App Rep** under **Additional Options** on the right-side menu.



02 Select **Applicant** for the **User Type** and click on **Proceed**.



03 Enter the new Applicant email address. The existing Applicant email address will be populated. **Note that the new Applicant must be registered with the Retrofit portal in advance of this step**.



AS AN APPLICANT – UPDATE THE APPLICANT FOR MY APPLICATIONS

04 A list of your applications will be populated. Select one or more of the applications for which you wish to change the Applicant and click **Reassign**.

Select Application(s) to change Applicant *

	Application Id	Application Name	Company Name	Applicant Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone
☑	2000143	Test Project - Abc	Ldcapi_100		3/31/2019	Ontario IMO	$3,000.00	Pre-Project Application Under Review	Pre-project review
☑	2000242	Apprep	Ret-1252		3/29/2019	Ontario IMO	$65,000.00	Pre-Project Application Returned For Edits	Pre-project review
☐	2000894	App Rep Fix	Testval4_no Lead Ldc		2/29/2020	Ontario IMO	$16,000.00	Pre-Project Application Submitted For Approval	Pre-project application

CANCEL REASSIGN

05 Confirm the change by clicking **Yes**.

Clicking on Yes will replace existing Applicant Representative with new Applicant Representative

NO YES

06 The system will provide you with a summary of changes. The user will be asked to confirm the change by clicking the Yes button.

Completion Status

Summary of Change

Previous Applicant

New Applicant

Selected Application IDs

102263,102340

Skipped Application IDs

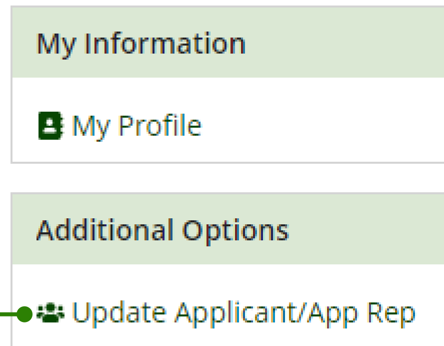
N/A

Updated Application IDs

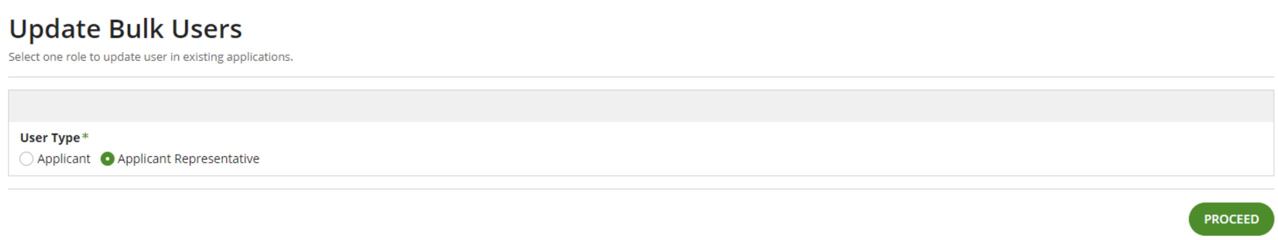
102263,102340

AS AN APPLICANT – UPDATE THE APP REP FOR MY APPLICATIONS

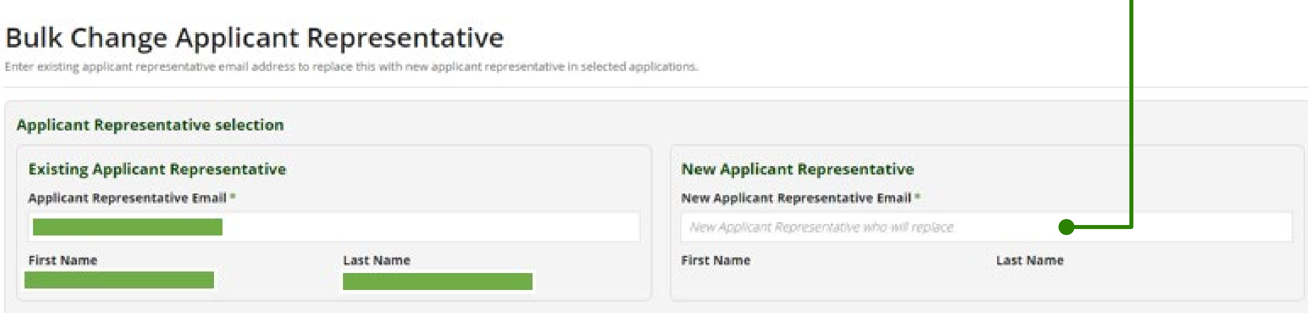
01 Click on **Update Applicant/App Rep** under **Additional Options** on the right-side menu.



02 Select **Applicant Representative** for the **User Type** and click on **Proceed**.



03 Enter the existing App Rep email address. Then, enter the new Applicant Representative email address. **Note that the New Applicant Representative must be registered with the Retrofit portal in advance of this step.**



AS AN APPLICANT – UPDATE THE APP REP FOR MY APPLICATIONS

04 A list of your applications with the existing App Rep will be populated. Select one or more of the applications for which you wish to change the Applicant Representative and click **Reassign**.

Select Application(s) to change Applicant Representative *

	Application Id	Application Name	Company Name	Applicant Representative Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone
☑	2000143	Test Project - Abc			3/31/2019	Ontario IMO	$3,000.00	Pre-Project Application Under Review	Pre-project review
☑	2000242	Apprep			3/29/2019	Ontario IMO	$65,000.00	Pre-Project Application Returned For Edits	Pre-project review

1 - 10 of 683

CANCEL

REASSIGN

05 Confirm the change by clicking **Yes**.

Clicking on Yes will replace existing Applicant Representative with new Applicant Representative

NO

YES

06 The system will provide you with a summary of changes.

Completion Status

Summary of Change

Previous Applicant

New Applicant

Selected Application IDs

102263,102340

Skipped Application IDs

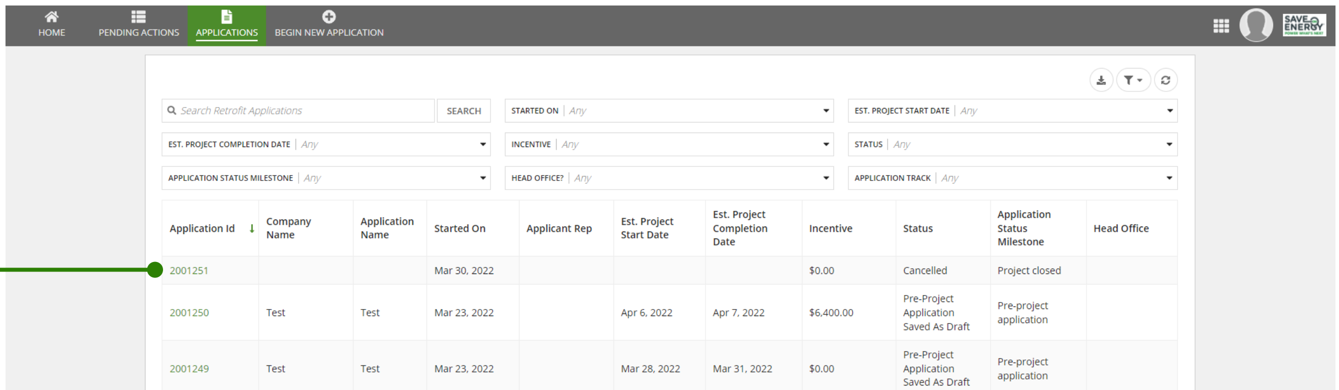
N/A

Updated Application IDs

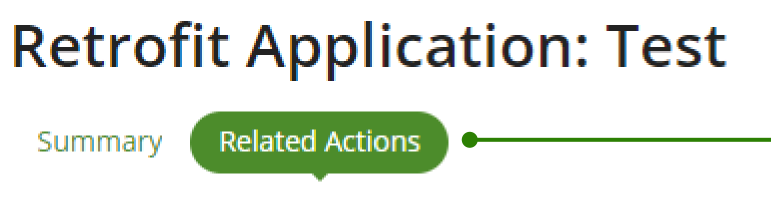
102263,102340

AS AN APPLICANT – ADD AN APP REP AT ANY POINT AFTER CREATING A NEW APPLICATION

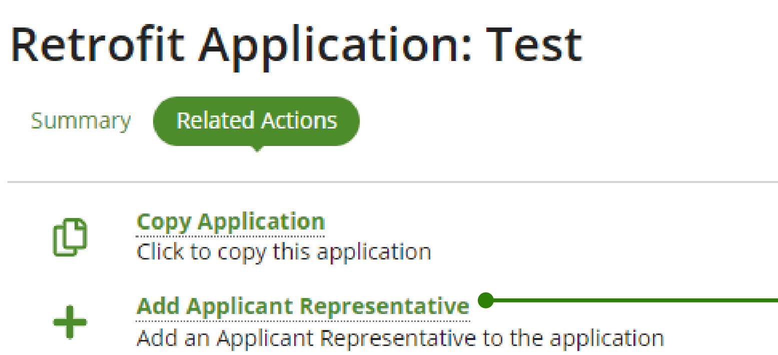
01 From the **Applications** tab, open the application for which you wish to add an Applicant Representative.



02 Click on **Related Actions** from the application.

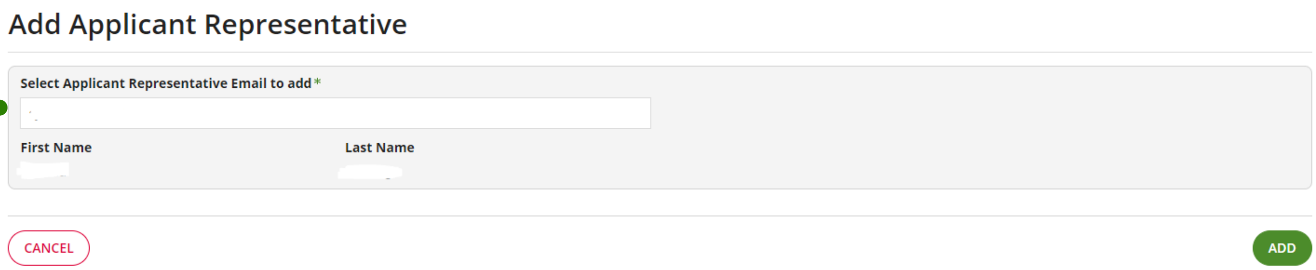


03 Click on **Add Applicant Representative**.



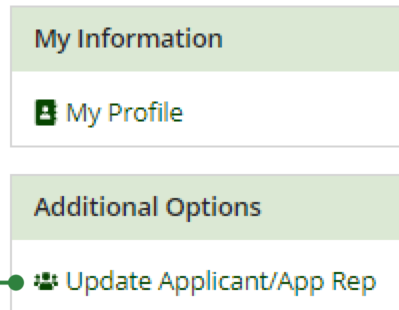
AS AN APPLICANT – ADD AN APP REP AT ANY POINT AFTER CREATING A NEW APPLICATION

04 Enter Applicant Representative's email address and click **Add.** This will complete the change. **Note that the new Applicant Representative must be registered with the Retrofit portal in advance of this step.**



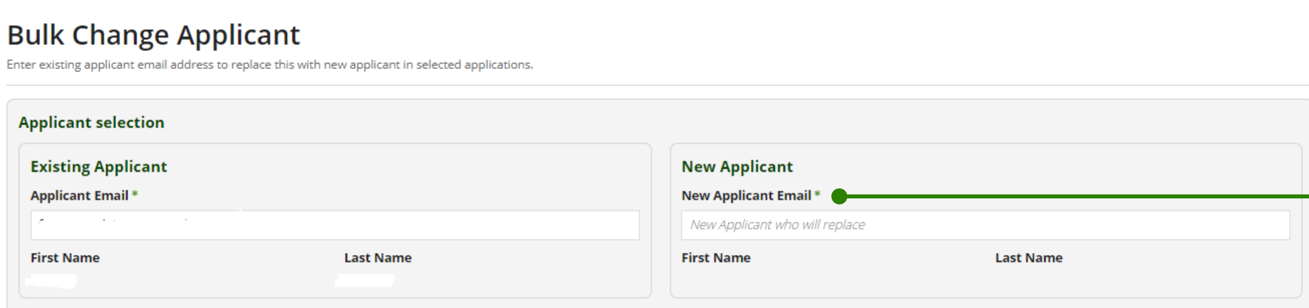
AS AN APP REP – UPDATE THE APPLICANT FOR MY APPLICATIONS

01 Click on **Update Applicant/App Rep** under **Additional Options** on the right-side menu in the Home screen.



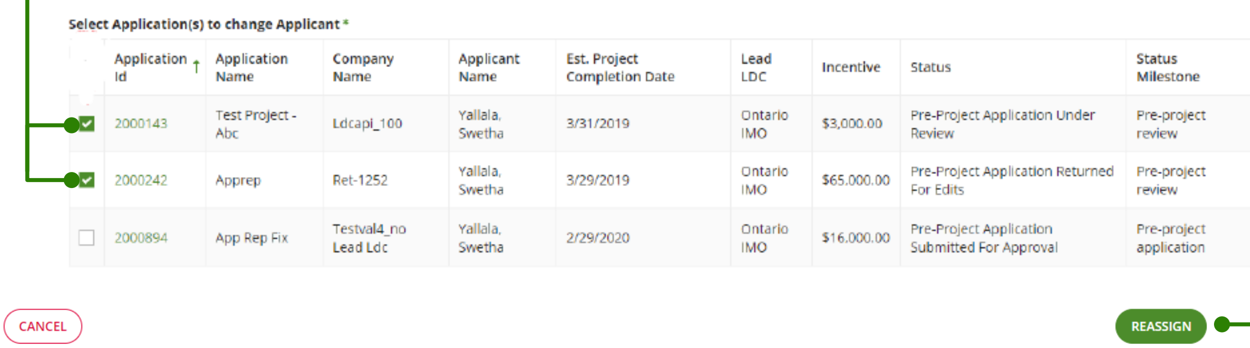
02 Select **Applicant** for the **User Type** and click **Proceed**.

03 Enter the existing Applicant email address and the new email address. The existing Applicant email address will be populated. **Note that the new Applicant must be registered with the Retrofit portal in advance of this step**.



AS AN APP REP – UPDATE THE APPLICANT FOR MY APPLICATIONS

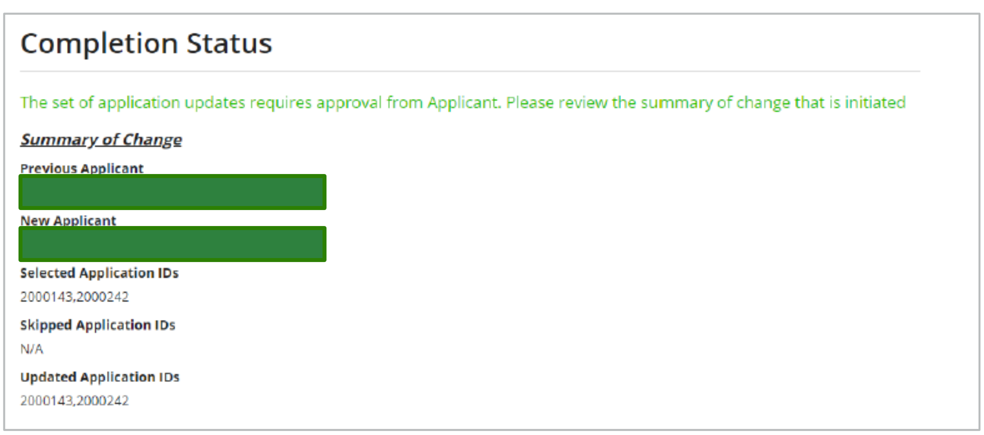
04 A list of your applications will be populated. Select one or more of the applications for which you wish to change the Applicant and click **Reassign**.


Select Application(s) to change Applicant *

	Application Id	Application Name	Company Name	Applicant Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone
☑	2000143	Test Project - Abc	Ldcapi_100	Yallala, Swetha	3/31/2019	Ontario IMO	$3,000.00	Pre-Project Application Under Review	Pre-project review
☑	2000242	Apprep	Ret-1252	Yallala, Swetha	3/29/2019	Ontario IMO	$65,000.00	Pre-Project Application Returned For Edits	Pre-project review
☐	2000894	App Rep Fix	Testval4_no Lead Ldc	Yallala, Swetha	2/29/2020	Ontario IMO	$16,000.00	Pre-Project Application Submitted For Approval	Pre-project application

05 Confirm the change by clicking **Yes**.

06 The system will provide you with a summary of changes. **Note that these changes need to be accepted by the existing Applicant in order to be completed.**


Completion Status

The set of application updates requires approval from Applicant. Please review the summary of change that is initiated

Summary of Change

Previous Applicant

[redacted]

New Applicant

[redacted]

Selected Application IDs

2000143,2000242

Skipped Application IDs

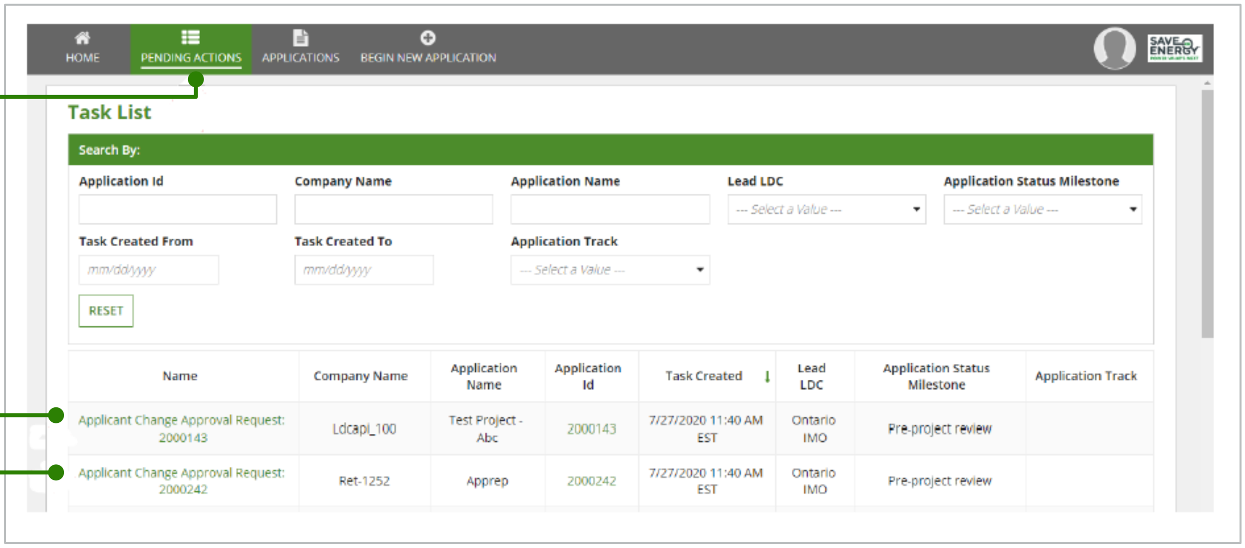
N/A

Updated Application IDs

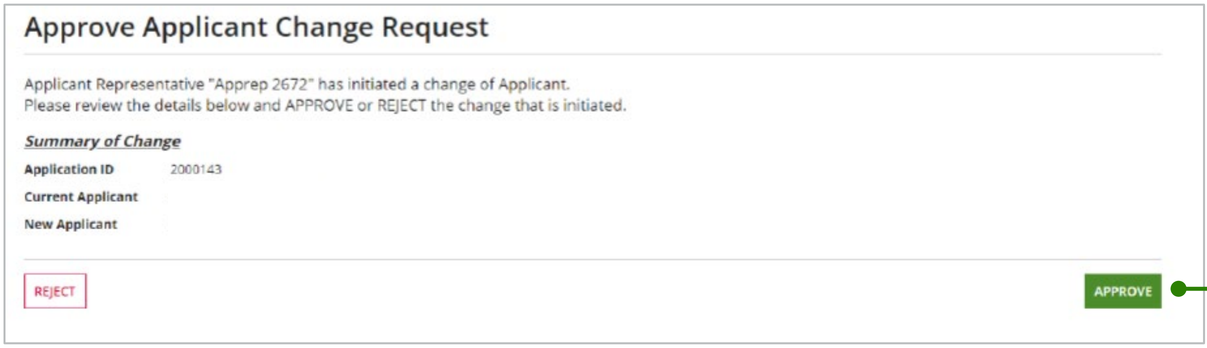
2000143,2000242

AS AN APP REP – UPDATE THE APPLICANT FOR MY APPLICATIONS

07 The existing Applicant will receive the task under the Pending Actions tab to accept the change initiated by the App Rep for each selected application.



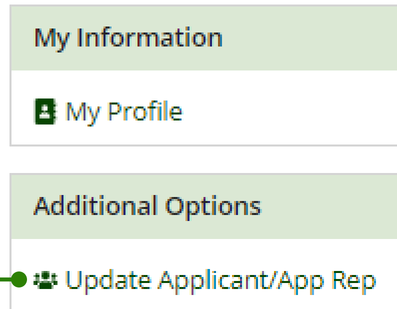
08 The Applicant must click on **Approve** to apply the change. **If the Applicant selects Reject, the changes will not be implemented for the application.**



09 The Applicant Representative will be notified via email of this change when the Applicant accepts or rejects the change.

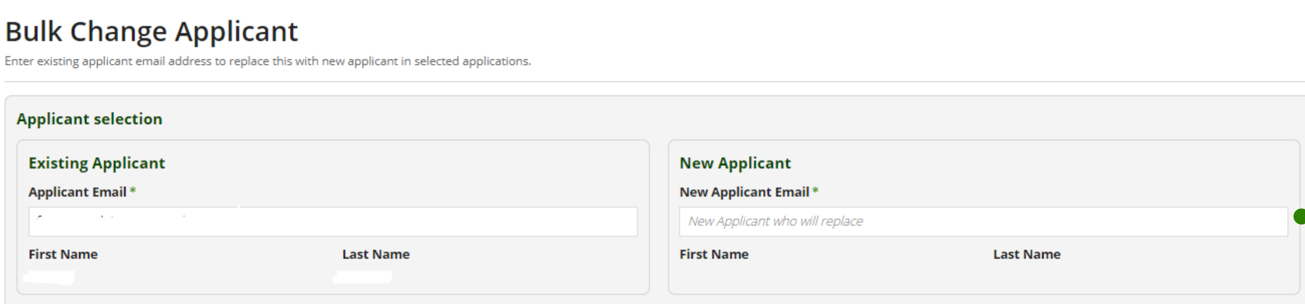
AS AN APP REP – UPDATE THE APP REP FOR MY APPLICATIONS

01 Click on **Update Applicant/App Rep** under **Additional Options** on the right-side menu.



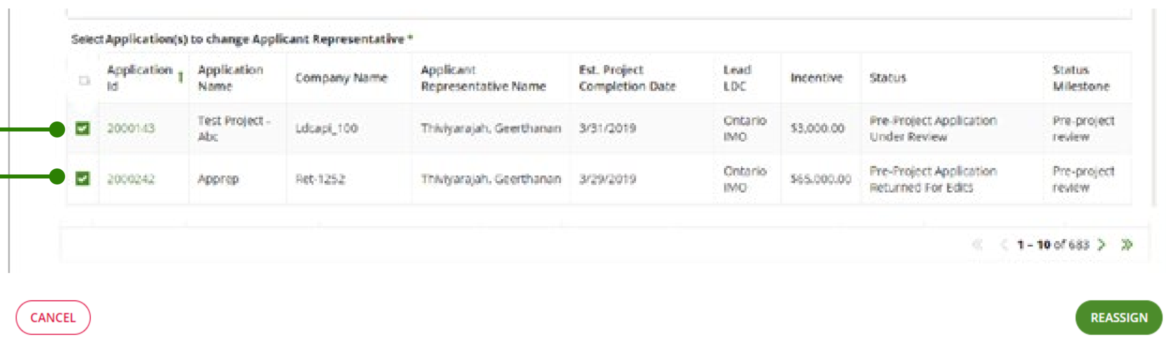
02 Select **App Rep** for the **User Type** and click **Proceed**.

03 Enter the new Applicant Representative email address. The existing App Rep email address will be populated. **Note that the new Applicant Representative must be registered with the Retrofit portal in advance of this step.**



AS AN APP REP – UPDATE THE APP REP FOR MY APPLICATIONS

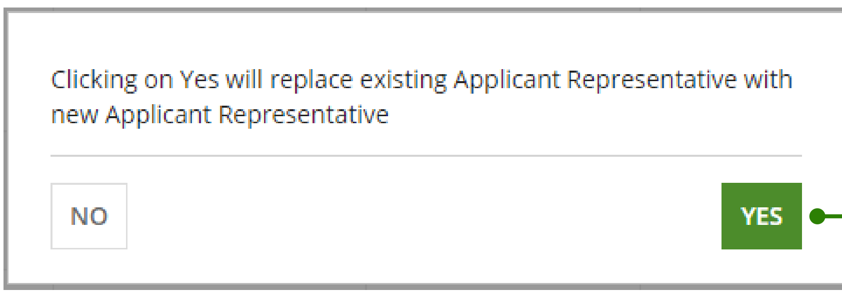
04 A list of your applications as the existing App Rep will be populated. Select one or more of the applications for which you wish to change the Applicant Representative and click **Reassign**.



Select Application(s) to change Applicant Representative *

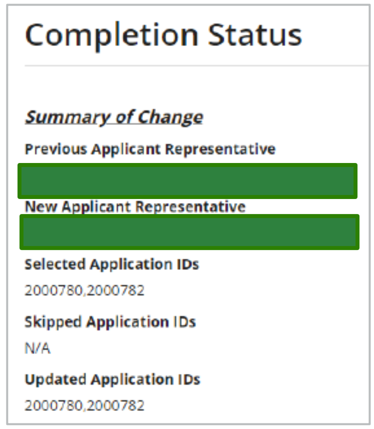
	Application Id	Application Name	Company Name	Applicant Representative Name	Est. Project Completion Date	Lead LDC	Incentive	Status	Status Milestone
☑	2000143	Test Project - Abc	Ldcapi_100	Thivyarajah, Geerthanan	3/31/2019	Ontario IMO	$3,000.00	Pre-Project Application Under Review	Pre-project review
☑	2000242	Apprep	Ret-1252	Thivyarajah, Geerthanan	3/29/2019	Ontario IMO	$65,000.00	Pre-Project Application Returned For Edits	Pre-project review

05 Confirm the change by clicking **Yes**.



AS AN APP REP – UPDATE THE APP REP FOR MY APPLICATIONS

06 The system will provide you with a summary of changes.



Project Applications

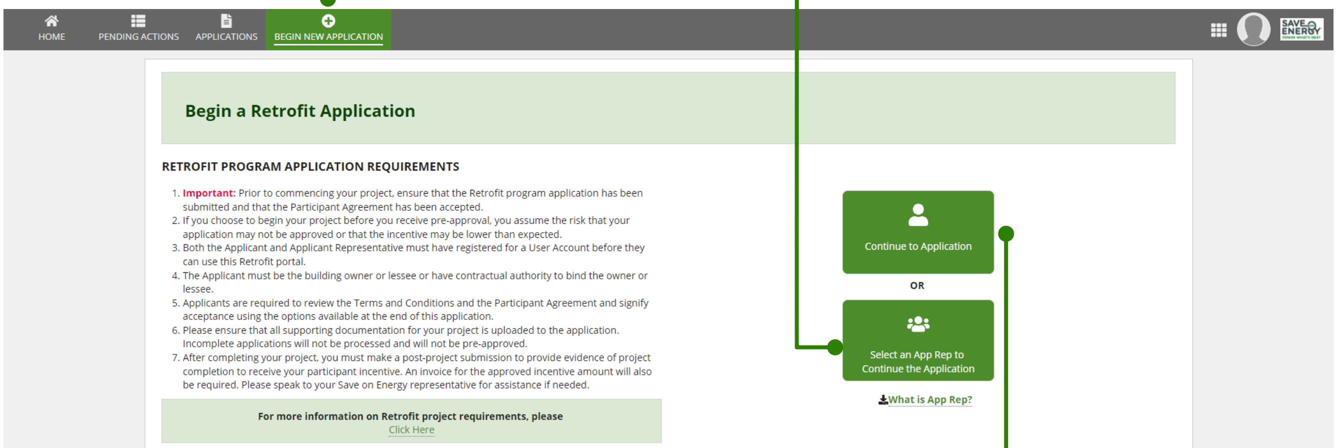
CREATING AN APPLICATION

An Applicant or Applicant Representative can create an application.

BEGINNING THE APPLICATION (AS AN APPLICANT)

01 Click **Begin New Application**.

If you would like to **assign the application to an Applicant Rep to complete**, continue to page 41.



02 Click **Continue to Application**.

This will create a new application to be completed, and it will bring you to the application main page.

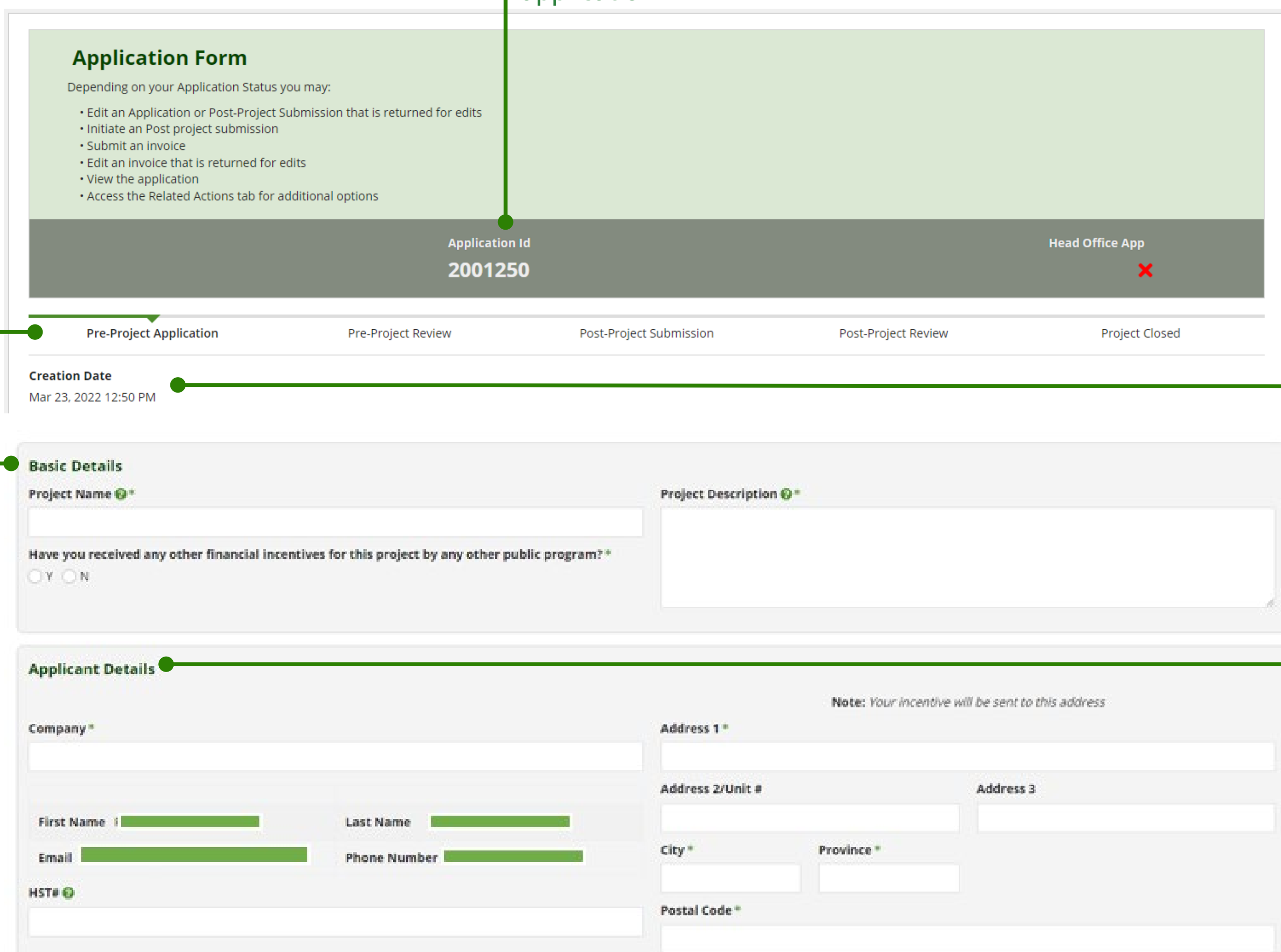
BEGINNING THE APPLICATION (AS AN APPLICANT)

You can view the application information from the main application page:

The project phase is displayed in the progress bar.

The Application ID is noted in this screen and will be used in future correspondence about your application.

The Creation Date is displayed under the progress bar.



The "Basic Details" section is where the project name and description is displayed.

The "Applicant Details" section summarizes Applicant information.

Applicant Representative Details

First Name	**Last Name**
Email	**Phone Number**

Manage Facilities

You must add at least one facility for your Application.

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
No items available						

+ ADD NEW FACILITY

Estimated Calculation Results

Energy, Demand, and Incentive Information

Estimated Application Eligible Cost	$0	**Estimated Application Energy Saving**	0
Estimated Application Incentive Amount	$0.00	**Estimated Application Demand Reduction**	0

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

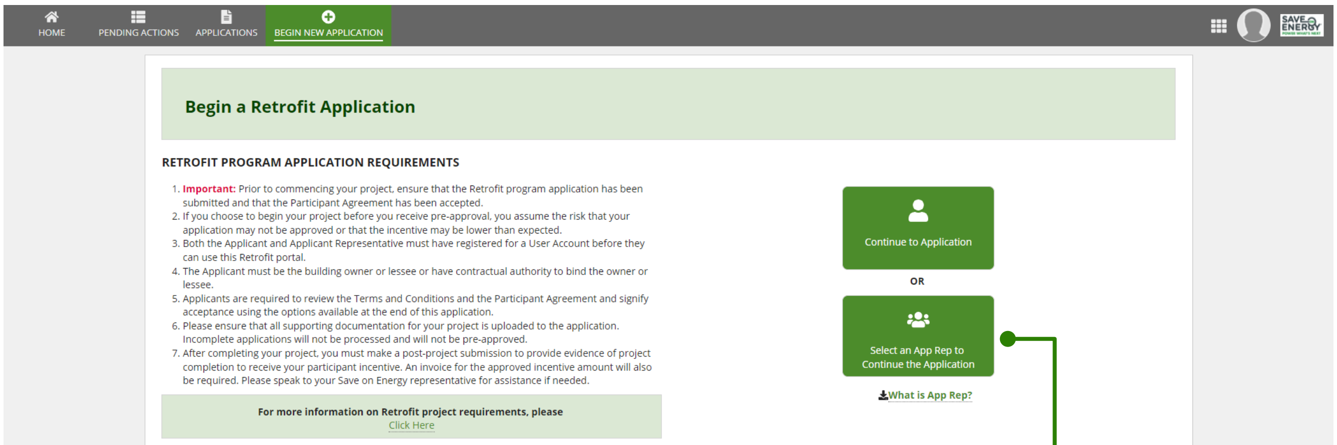
The "Applicant Representative Details" section summarizes Applicant Representative information (if applicable).

The "Estimated Calculation Results" section summarizes eligible project costs, energy savings, demand reduction and incentive information.

ASSIGNING A NEW APPLICATION TO AN APP REP

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

01 Click **Begin New Application**.



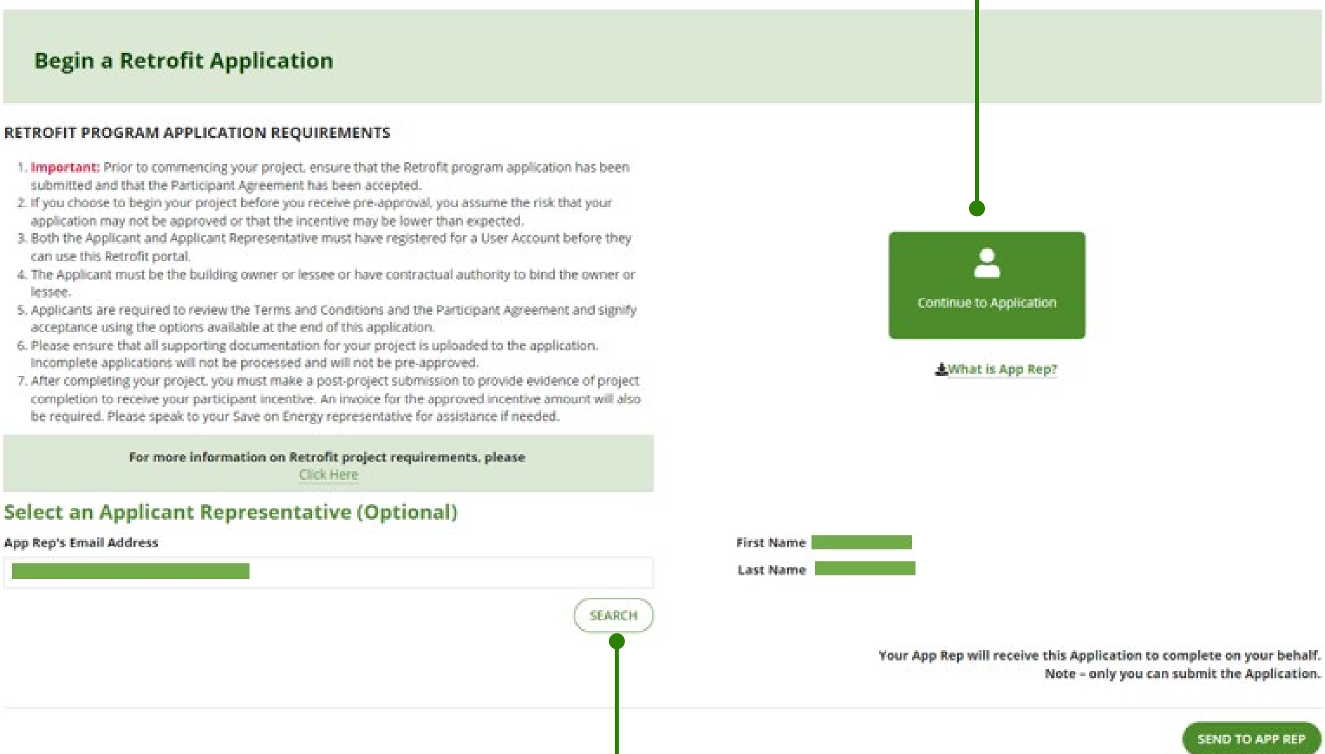
02 Click **Select an App Rep to Continue the Application**.

Note: Applicants are able to add an Applicant Rep at any point after creating the application. Details on adding an Applicant Rep can be found on page 29. They are also able to update an existing Applicant Rep to a new contact. Details on updating an Applicant Rep can be found on page 34.

ASSIGNING A NEW APPLICATION TO AN APP REP

The Applicant can fill in the project details by clicking the "Continue to Application" button even if an App Rep has been selected.

03 Enter the Applicant Representative's email address.



04 Click **Search**.

05 Click **Send to App Rep**.

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

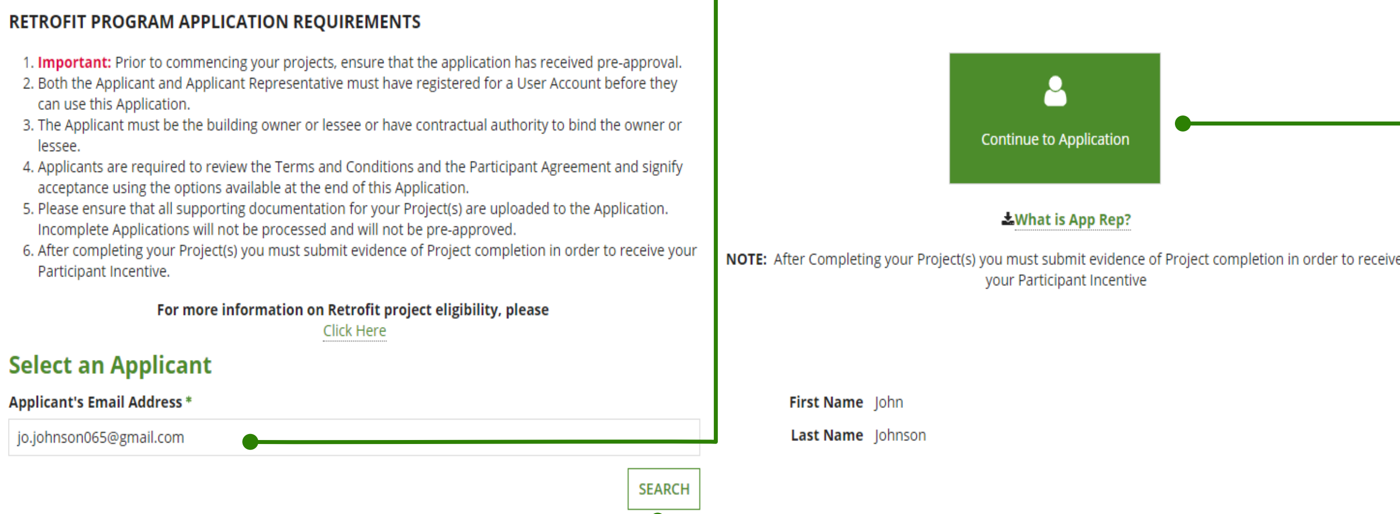
When the application is complete, the Applicant will need to review it before final submission. Please visit page 57 for details on Submitting an Application.

Note: Applicant Representatives must have fully activated their Save on Energy Retrofit portal account before they are able to be added to an application. If you are unable to find their account, please have them ensure they have correctly registered as an "Applicant Representative."

BEGINNING THE APPLICATION (AS AN APPLICANT REPRESENTATIVE)

01 Click **Begin New Application**.

02 Enter the Applicant's email address



03 Click **Search**.

04 Click **Continue to Application**.

This will create a new application to be completed, and it will bring you to the application main page.

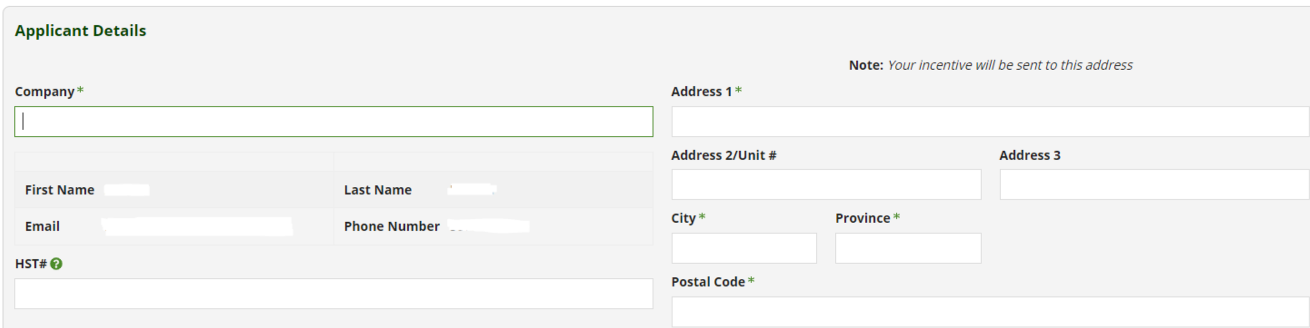
Note: Applicants must have fully activated their Save on Energy Retrofit portal account before they are able to be added to an application started by an App Rep. If an App Rep is unable to find their account on the portal, the Applicant will need to ensure they have correctly completed their registration as detailed on page 6, and that they are registered as an "Applicant," not an "Applicant Representative."

APPLICANT DETAILS

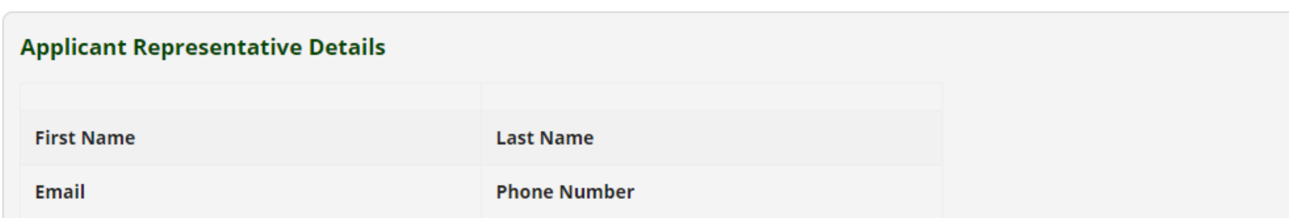
If this is the Applicant's first application, the **Applicant Details** will need to be completed. This section will automatically populate for future applications.

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

The address listed in this section will be the address to which the incentive cheque is mailed.



> **Note**: If an Applicant Representative is assigned to the application, the Applicant Representative Details section will automatically populate.

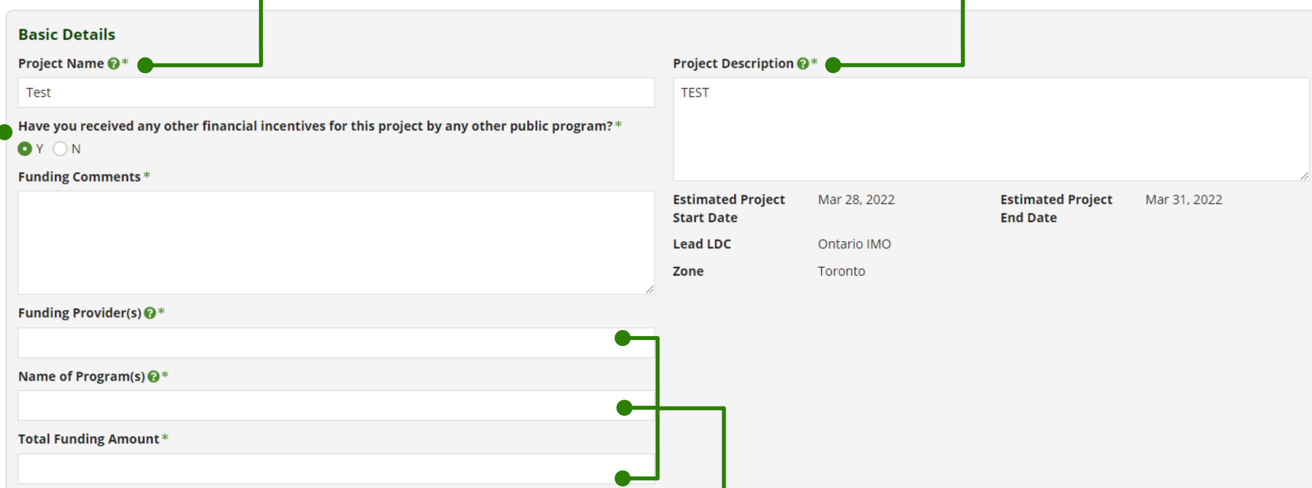


ADDING BASIC PROJECT DETAILS

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

Enter a project name under the "Project Name."

Briefly describe the project in the "Project Description."

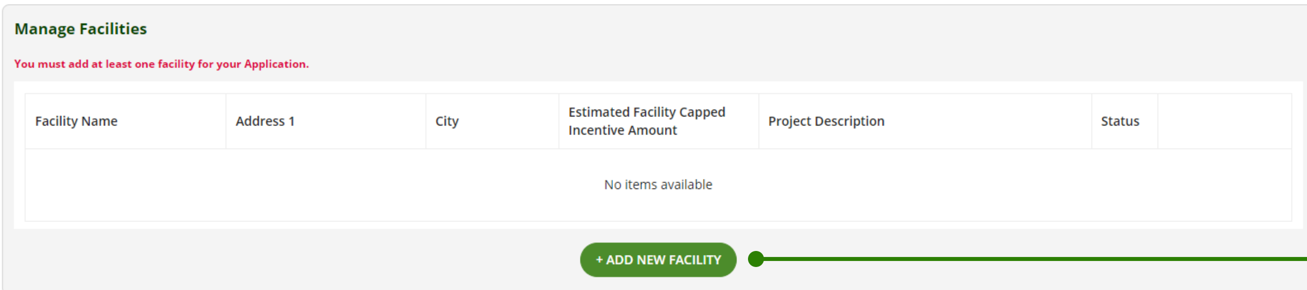


Select whether you have received other financial incentives for the project from other programs.

If you are receving other financial incentives, you must provide additional information, such as funding provider, program name and amount received.

ADDING FACILITIES

01 Click **Add New Facility**.



This will bring you to the main page for the new facility.

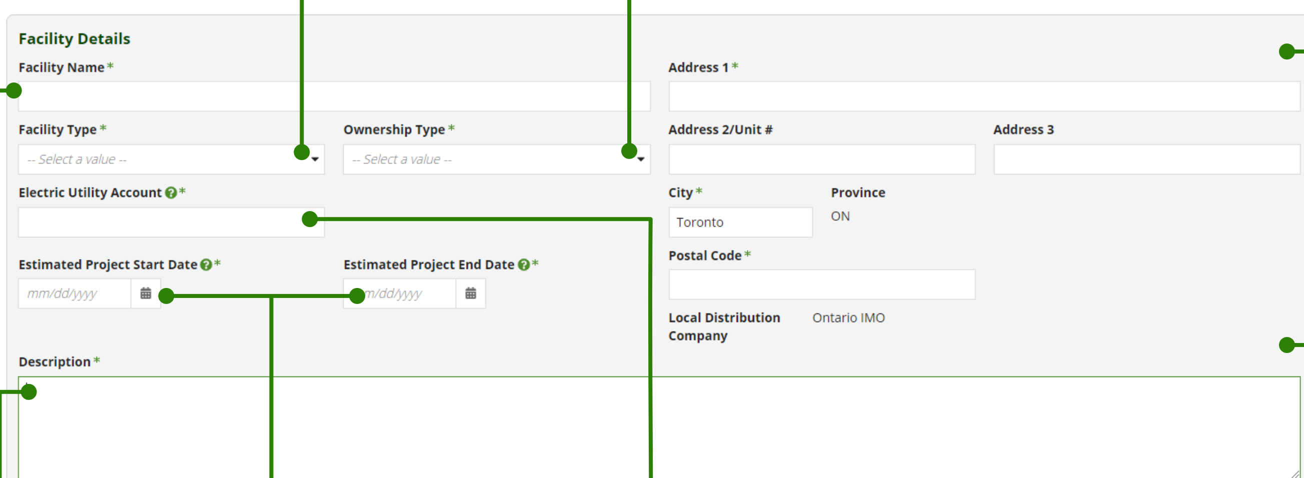
02 Complete the mandatory fields in the **Facility Details** section of the **facility main page**, if you are adding a new facility that has not been used in a previous application.

Enter a facility name under the "Facility Name" section.

Select the "Facility Type" from the drop-down menu.

Select the "Ownership Type" from the drop-down menu.

Under the "Address" section, enter the facility address, city, and postal code.



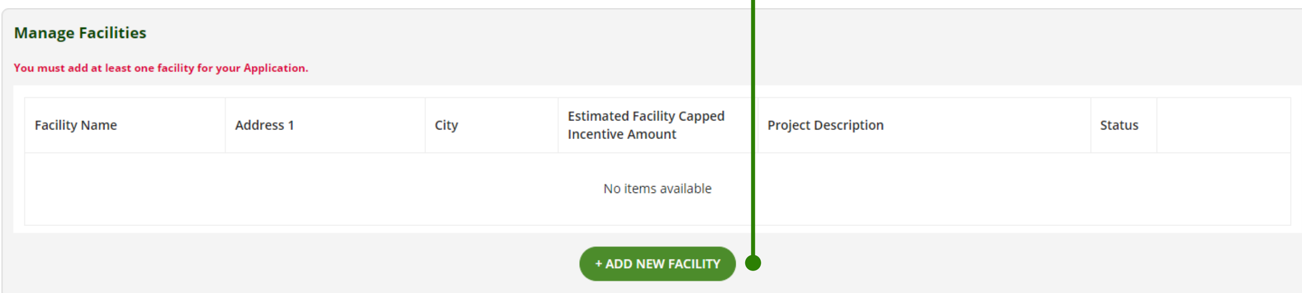
Enter a project description under the "Description" section.

Select an estimated "Project Start Date" and "Project End Date" from the calendar.

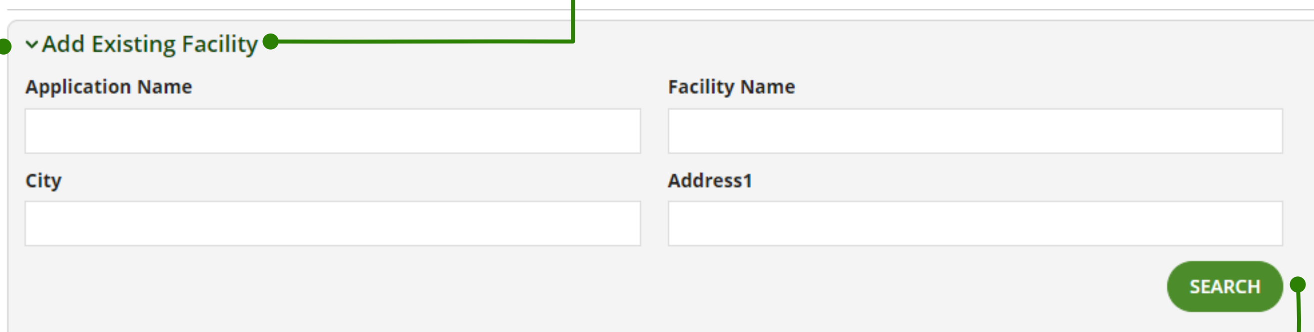
Enter the utility account number under the "Electric Utility Account" section.

ADDING FACILITIES FROM AN EXISTING FACILITY

01 Click **Add New Facility**.



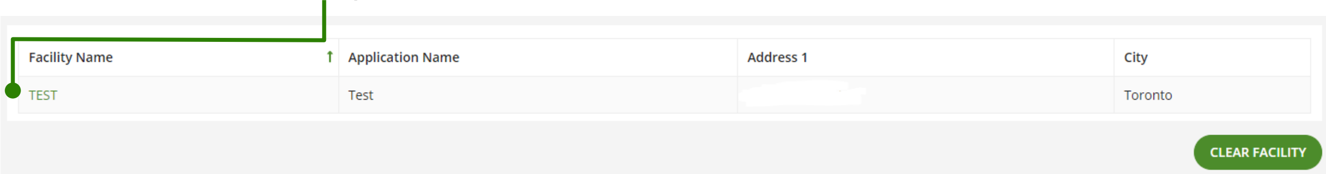
02 Click on **Add Existing Facility**.



03 Enter **facility information**, such as the application name, facility name, city or address.

04 Click **Search**.

05 Select the facility from the facilities list.



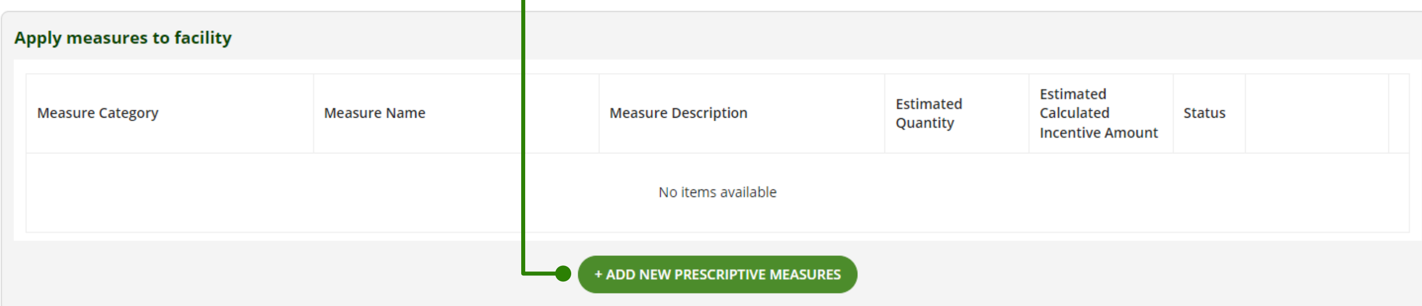
This will populate the Basic Details section with the information previously provided from the selected facility. You will still be required to select the **estimated start** and **end dates**.

ADDING PRESCRIPTIVE MEASURES

As of April 8th, 2022, some new measures were added to the Retrofit program. Some of these measures enable greater flexibility and improve accuracy of allocated savings by allowing program participants to provide more information on their use. The required inputs will vary by measure.

PRESCRIPTIVE MEASURE INPUT

01 To add a measure, click **Add New Prescriptive Measure** in the **Apply Measures to Facility** section.



02 Complete the mandatory fields in the **Measure Details** section of the **Measures page**.

The first example below (page 49) shows a Prescriptive Measure with one required field. The second example below (page 50) shows a Prescriptive Measure with more than one required field.

Example 1: **Prescriptive Measure with one required field**

Select the "Measure Category".

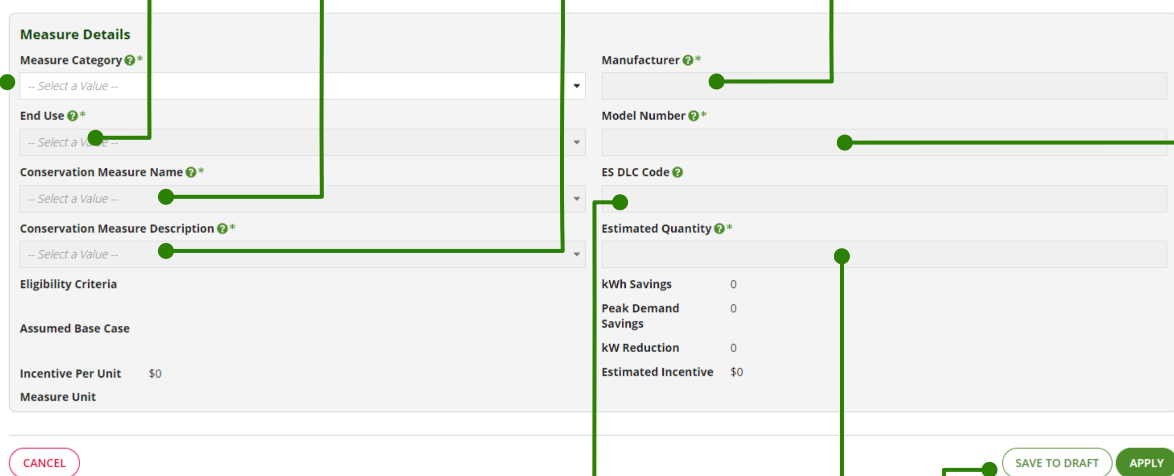
Select the "End Use".

Select the "Conservation Measure Name".

Select the "Conservation Measure Description".

Enter the "Manufacturer" Name.

Enter the Model Number.



If you are installing lighting products, enter the "ES DLC Code".

Enter the "Estimated Quantity".

Click "Save to Draft" if you want to save a measure as draft.

Click "Apply" to add the measure to the facility.

Example 2: **Prescriptive Measure with more than one required field**

Select the "Measure Category".

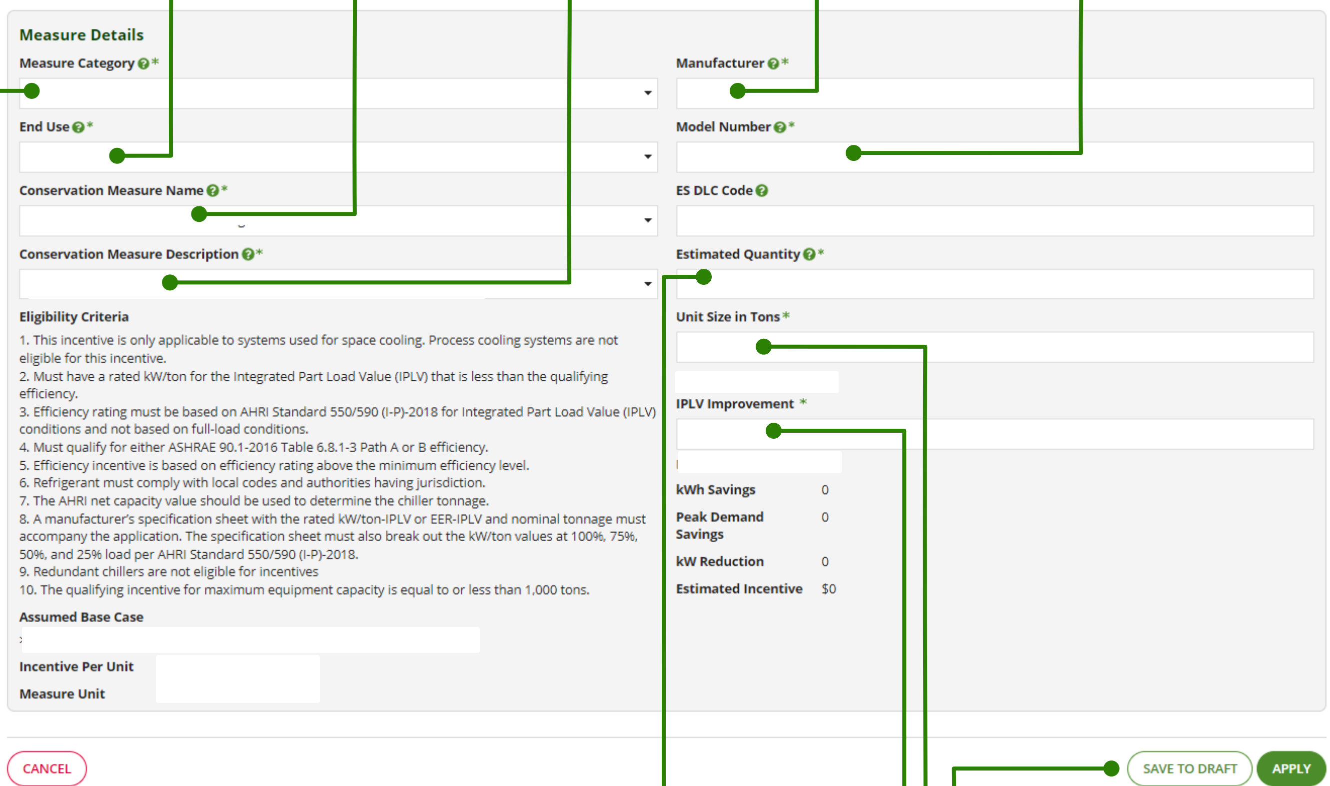
Select the "End Use".

Select the "Conservation Measure Name".

Select the "Conservation Measure Description".

Enter the "Manufacturer" Name.

Enter the Model Number.



Enter the "Estimated Quantity".

Enter the "IPLV Improvement"

Enter the "Unit Size in Tons".

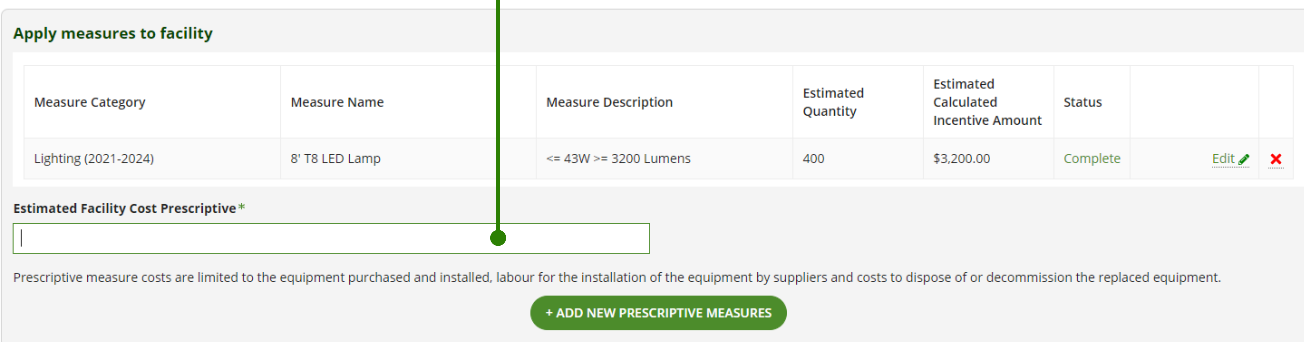
Click "Save to Draft" if you want to save a measure as draft.

Click "Apply" to add the measure to the facility.

ADDING PRESCRIPTIVE MEASURES

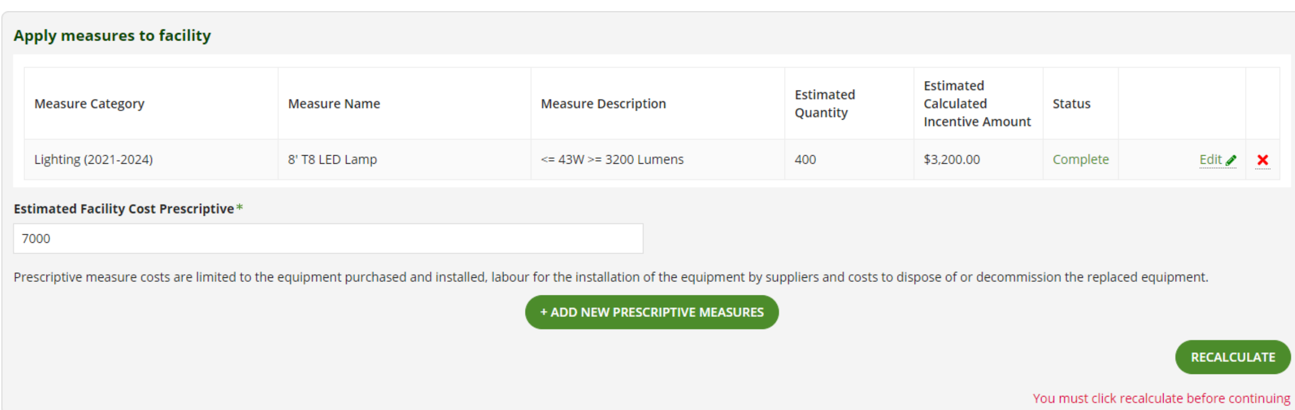
After all the measures in the project scope are added under the **Apply measures to facility** section, the **total prescriptive project cost** must be added under **Estimated Facility Cost Prescriptive** field.

03 Enter the total **prescriptive project cost** in the **Estimated Facility Cost Prescriptive** field.



If you click on the **Apply** button in the **Facility** page after entering the cost, a **Recalculate** button will appear below the **Add New Prescriptive Measures** button, along with a prompt that states "You must click recalculate before continuing."

04 Click **Recalculate** and wait for the portal page to refresh.



05 Review the **Estimated Calculation Results** section on the **Facility Main Page**.

Note: There is a minimum incentive threshold for Retrofit applications to be eligible. The total calculated incentive of the application must be greater than that threshold to be eligible for incentives. You will be blocked from submitting a facility if it does not meet the minimum eligibilty criteria.

ADDING PRESCRIPTIVE MEASURES

06 Click **Apply.**

Estimated Calculation Results

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	$7,000.00	53,861.200	9.620	14.920	$3,200.00
Total	$7,000.00	53,861.200	9.620	14.920	$3,200.00

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

Project Type

BACK TO APPLICATION DELETE DUPLICATE FACILITY SAVE TO DRAFT APPLY

DUPLICATING A FACILITY

If you need to add more than one facility to your application, you can save time by duplicating a facility instead of creating each one from scratch.

01 Click on the **Edit** button to open an **existing facility**.

Manage Facilities

Updated?	Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
No	TEST	393 University Ave	Toronto	$3,200.00	TEST	Complete	Edit
No	TEST	393 University Ave	Toronto	$3,200.00	TEST	Complete	Edit

+ ADD NEW FACILITY

02 Scroll to the bottom of the **Facility Main Page** and then click **Duplicate Facility**.

Estimated Calculation Results

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	$7,000.00	53,861.200	9.620	14.920	$3,200.00
Total	$7,000.00	53,861.200	9.620	14.920	$3,200.00

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

Project Type

BACK TO APPLICATION | DELETE | DUPLICATE FACILITY | SAVE TO DRAFT | APPLY

03 A prompt will appear on the screen. Click on the **Yes** button if you wish to proceed with duplicating the facility, or click on the **No** button if you wish to withdraw from the facility duplication process for the moment.

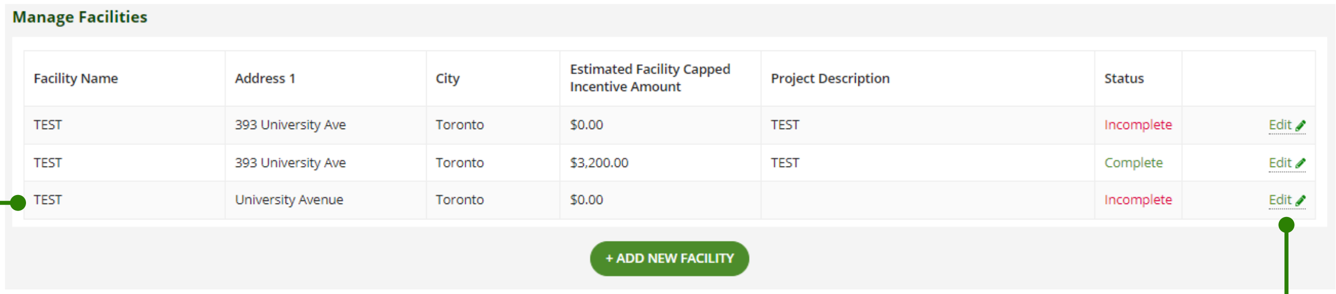
Duplicating this facility will save all current changes, create a new facility identical to the current facility, and then return you to the current facility. All facilities are listed on the Application page. Proceed?

NO | YES

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

DUPLICATING A FACILITY

04 After the page refreshes, Click **Apply** to return to the **Application Main Page**. The duplicated facility will appear under the **Manage Facilities** section.



Manage Facilities

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
TEST	393 University Ave	Toronto	$0.00	TEST	Incomplete	Edit
TEST	393 University Ave	Toronto	$3,200.00	TEST	Complete	Edit
TEST	University Avenue	Toronto	$0.00		Incomplete	Edit

+ ADD NEW FACILITY

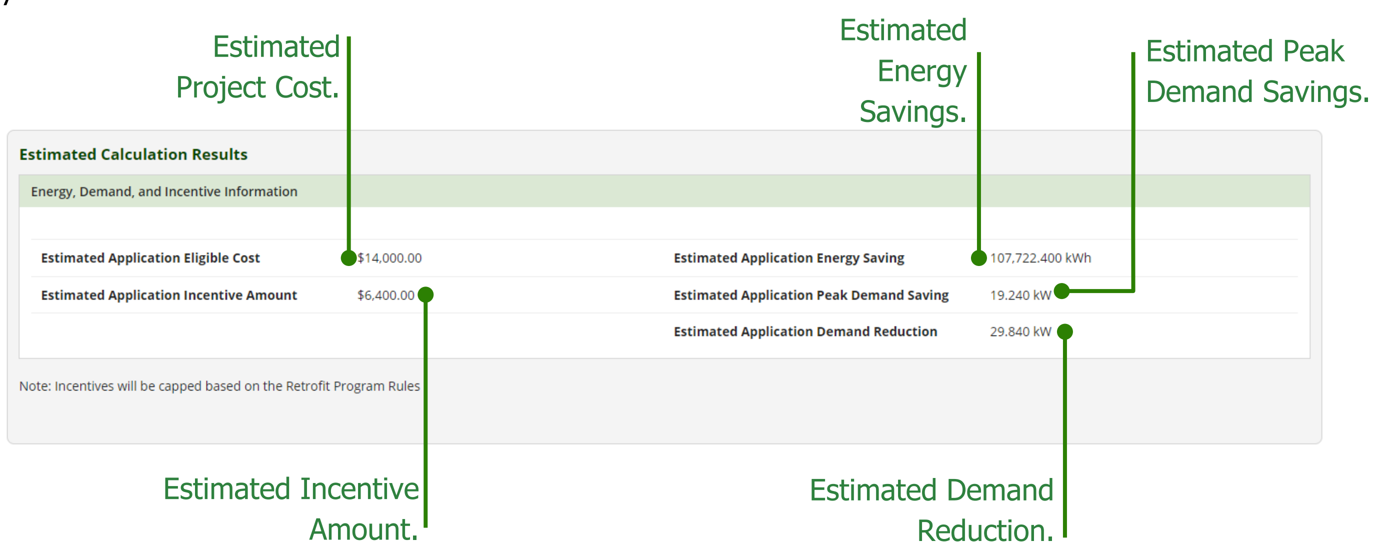
Click on the **Edit** button beside the **Incomplete** status.

This will take you to the new facility's **Facility Main Page** where you can enter the details for your new facility.

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

REVIEWING ESTIMATED CALCULATION RESULTS

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

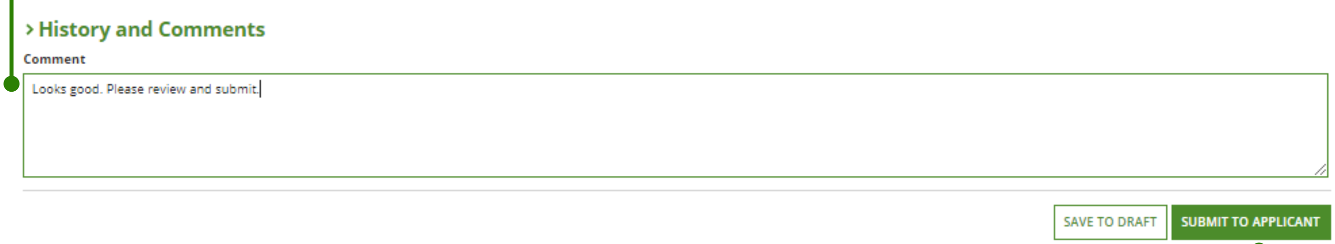


Note: If you are an Applicant, continue to **Submitting the Application** section on page 57. Once the application has been submitted by the Applicant, the Application Status for this application displays as "Pre-Project Application Submitted for Approval." This indicates that the application has been submitted to the Save on Energy Technical Reviewer for review.

If you are an Applicant Representative, then you must forward the application to the Applicant. Continue to **Forwarding the Application to the Applicant** section on page 56. Once the application is submitted to the Applicant, the Application Status for this application then displays as "Pre-Project Application Sent to Applicant."

FORWARDING THE APPLICATION TO THE APPLICANT

01 Enter a comment in the text box under History and Comments section of the Application Main Page. It will be sent to the Applicant with the application to submit.



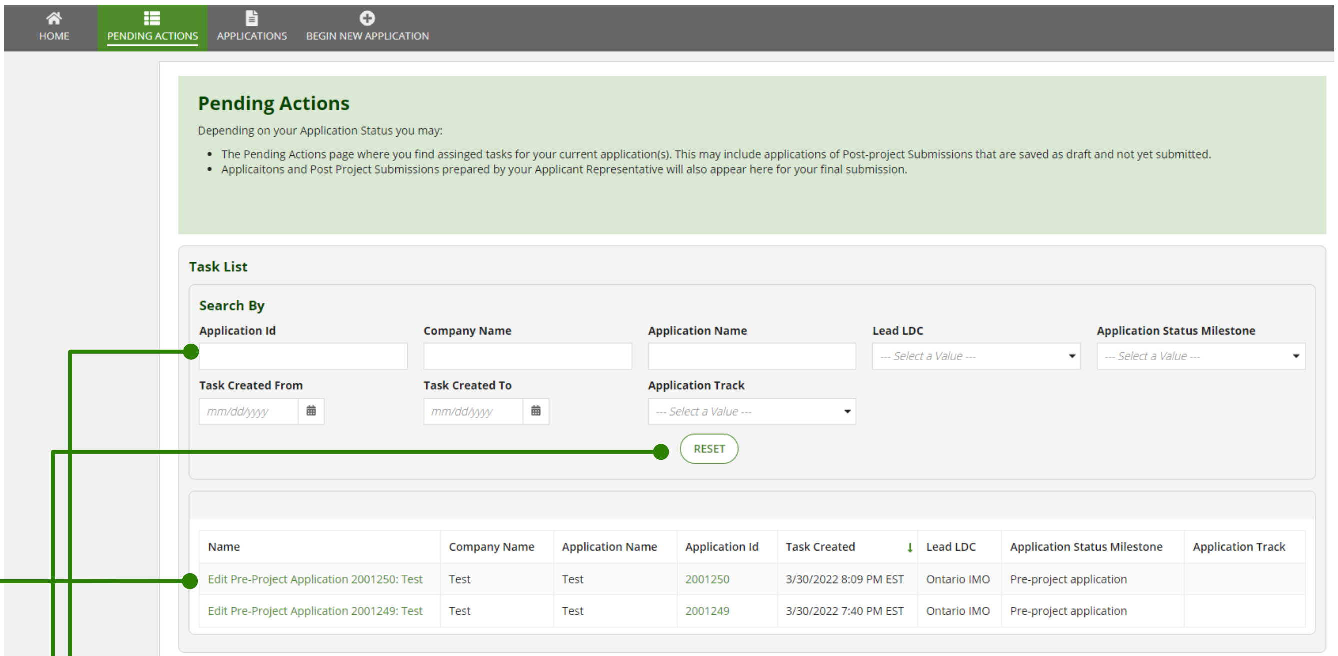
02 Click **Submit to Applicant**.

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

SUBMITTING THE APPLICATION

An application can only be submitted from the **Applicant's** account.

01 Click on the **Pending Actions** tab.



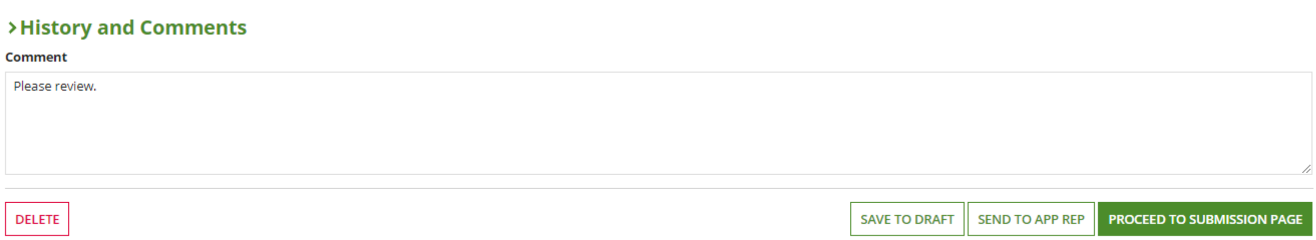
02 Enter the Application number in the Application ID field.

03 Click **Reset**, located below the "Application Track" field.

04 Click **Edit Pre-Project Application "Project ID: Project Name."**

05 Review all the information in the application and make any necessary edits if required.

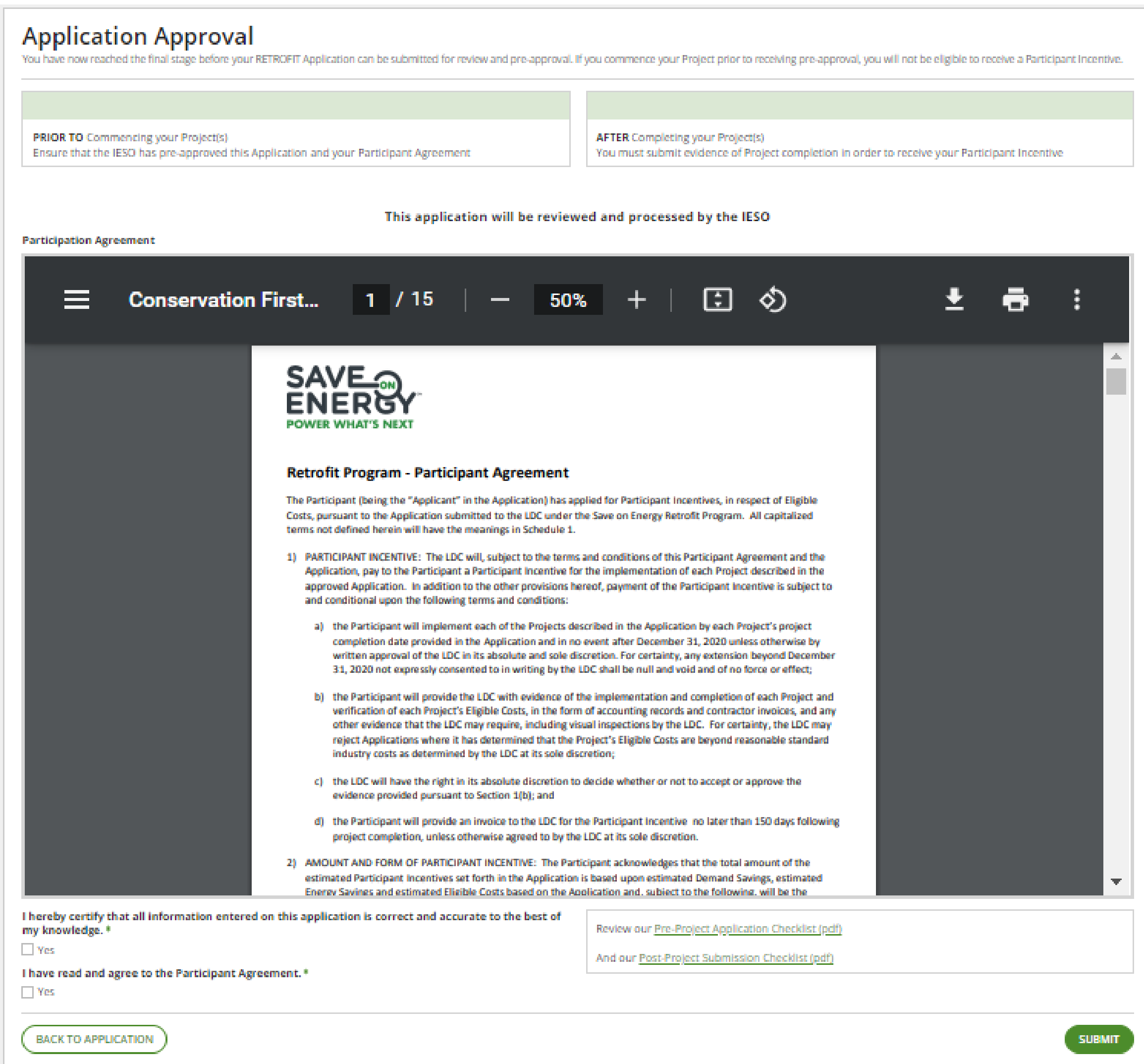
06 Enter a comment and then click **Proceed To Submission Page**.



If the application was completed by an Applicant Representative, you can click **Send to App Rep** to return the application to them, if required.

SUBMITTING THE APPLICATION

07 Select the **Yes** option to indicate that all the information in the application is correct and to indicate that you have read and agreed to the Participant Agreement. This is where Applicants agree to the Terms and Conditions of the program under which they will receive the incentive. Any questions about the Participant Agreement can be directed to a Save on Energy Representative.



08 If the application has been assigned an Applicant Representative you will see an option to indicate that communication can be with the App Rep. If that's what you prefer, select **Yes**.

09 Click **Submit**.

SUBMITTING THE APPLICATION

10 The Save on Energy Technical Reviewer will now receive an email notification to review the application, and you will receive a notification that your application has been submitted. Click **Okay**.

Successful Submission for Application: [redacted]

Thank you for your interest in the Save on Energy Retrofit Program.Ontario IMO has received your application.

APPLICATION INFORMATION

Submission Date: [redacted]

Application Name: [redacted]

Application ID: [redacted]

Project Location(s): Peaches [redacted]

Total Estimated Application Incentive: [redacted]

Applicant Representative Name: [redacted]

Applicant Representative Email Address: [redacted]

Applicant Representative Phone Number: [redacted]

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

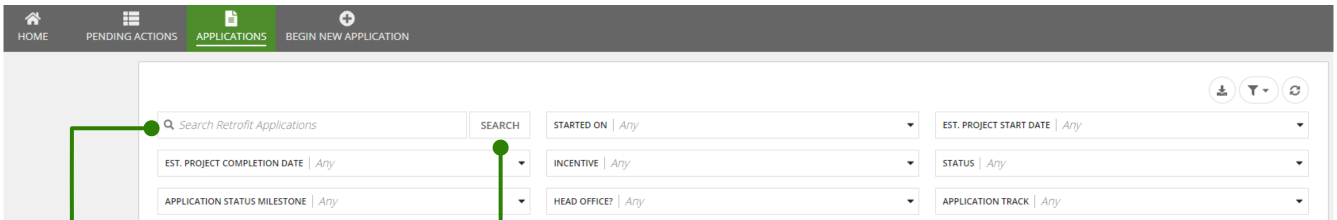
Note: At this stage, your application has been submitted and will be assigned to a Save on Energy Technical Reviewer for review. Should they have any questions about the application provided, they will reach out to the Applicant and/or Applicant Representative. Once reviewed and approved, your project status will change to "Pre-Project Application Approved."

Note: When you begin your project is up to you. You can start 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.

COPYING THE APPLICATION

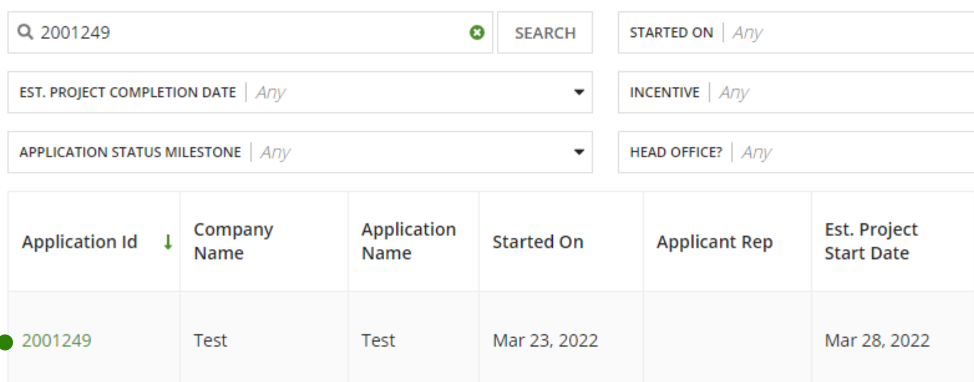
Applicants and **Applicant Representatives** can create a copy of a pre-existing application.

01 Click on the **Applications** tab.

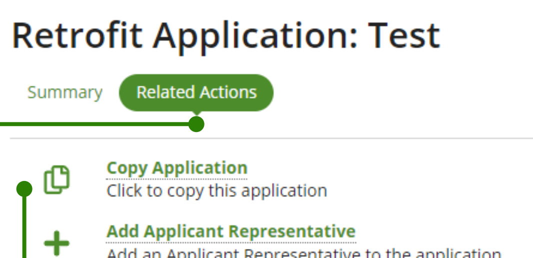


02 Enter the Application ID.

03 Click **Search**.



04 Click the **Application ID**.

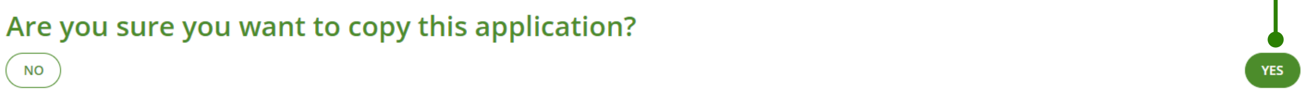


05 Click on **Related Actions** tab.

06 Click on **Copy Application**.

COPYING THE APPLICATION

07 Click **Yes**.

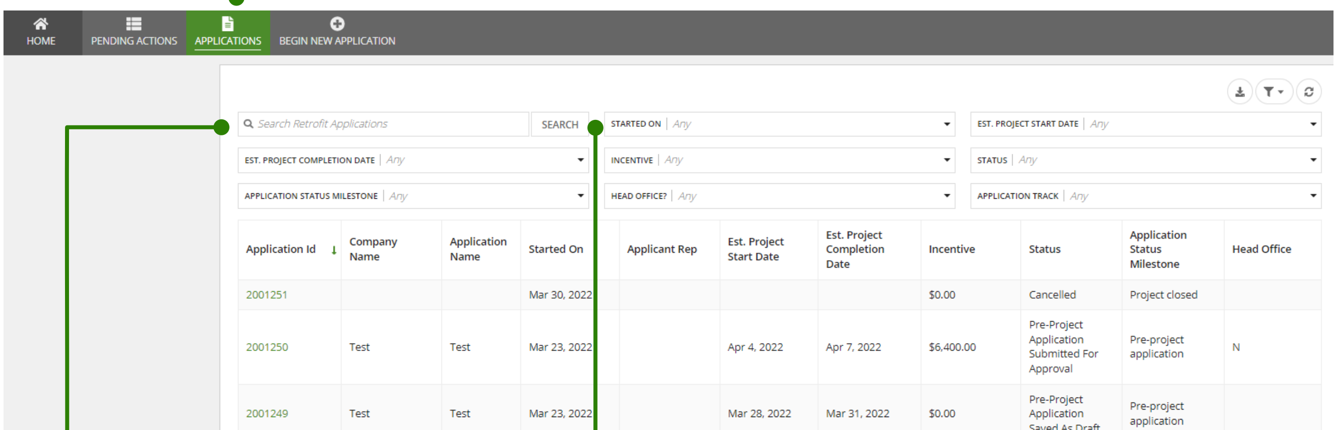


The application can now be modified where required for a new project.

RECALLING AN APPLICATION

The **Applicant** can recall an application that has been submitted for approval, as long as the Save on Energy Technical Reviewer has **not** started their review.

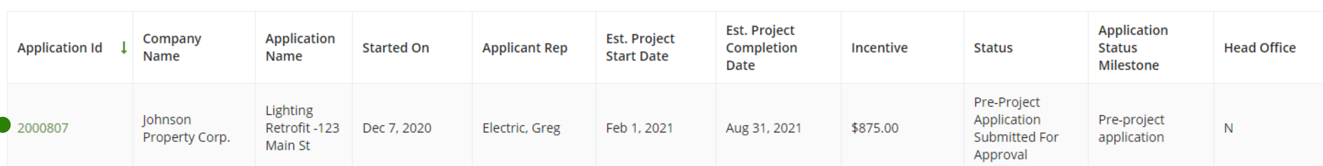
01 Click on the **Applications** tab.



02 Enter the Application ID.

03 Click **Search**.

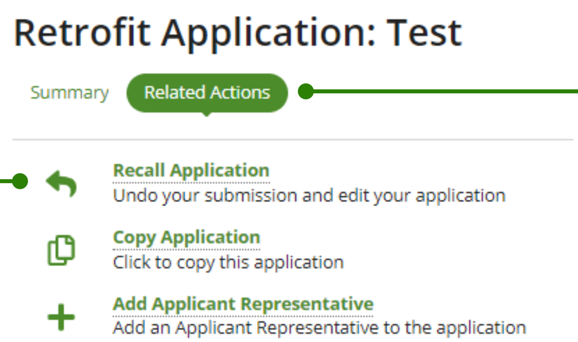
04 Click the Application ID.



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
2000807	Johnson Property Corp.	Lighting Retrofit -123 Main St	Dec 7, 2020	Electric, Greg	Feb 1, 2021	Aug 31, 2021	$875.00	Pre-Project Application Submitted For Approval	Pre-project application	N

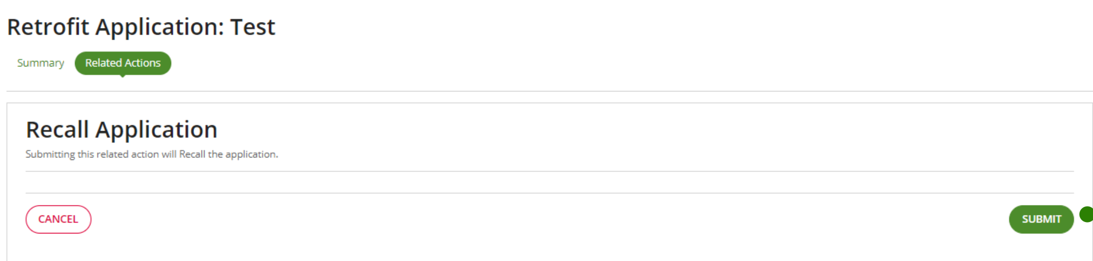
RECALLING AN APPLICATION

05 Click on the **Related Actions** tab.

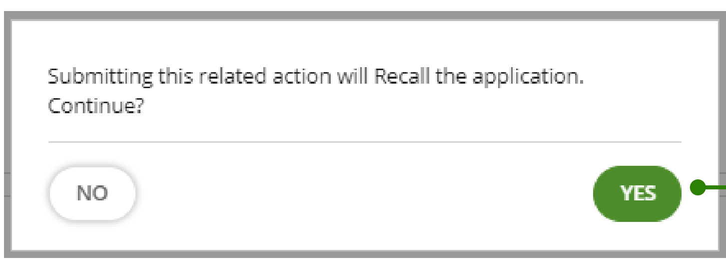


06 Click **Recall Application**.

07 Click **Submit**.



08 Click **Yes**.



Completing the above steps will return the application to the **Pre-Project Saved as Draft** stage, where required edits can be made before resubmission. The Applicant will receive an email notification to edit the application.

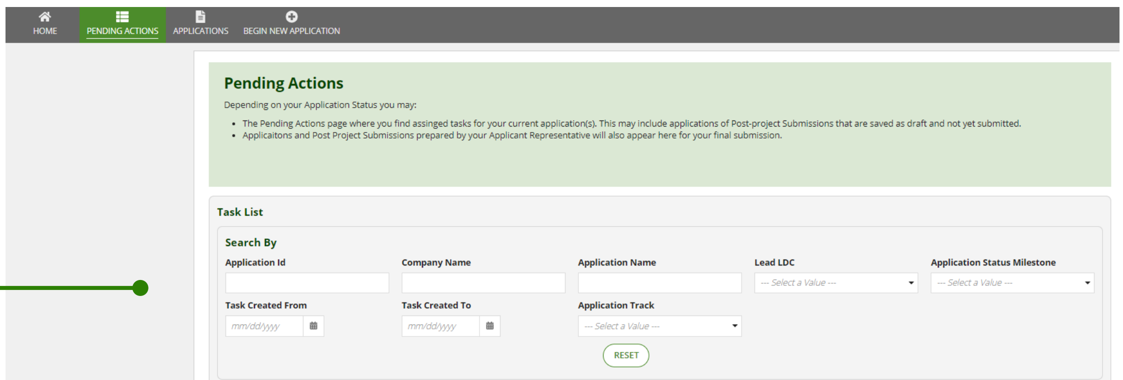
Note: If the Save on Energy Technical Reviewer has started reviewing the application, you will receive an error message stating you cannot recall the application. If edits are required, contact your Save on Energy Technical Reviewer to open the application for edits.

DELETING AN APPLICATION

The **Applicant** can delete an application before it has been submitted to the Save on Energy Technical Reviewer for approval.

> **Note**: When you delete the application it cannot be recovered, even by technical support. If you wish to delete an application that has been submitted for approval, please contact the Save on Energy Technical Reviewer for assistance.

01 Click on the **Pending Actions** tab.



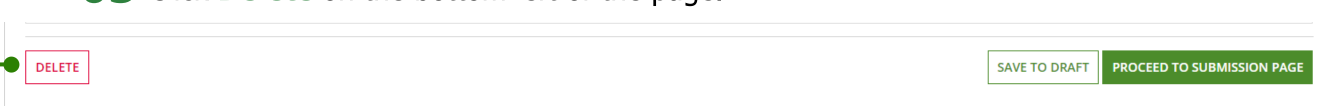
02 Enter the **Application ID**.

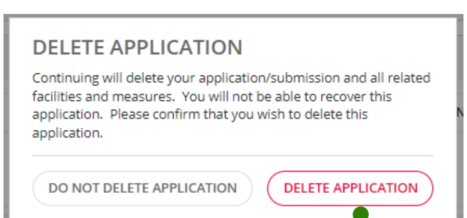
03 Press enter on your keyboard or click anywhere on the page for the search results to load.

04 Click on **Edit Pre-Project Application "Project ID: Project Name"**.

Name	Company Name	Application Name	Application Id	Task Created	Lead LDC	Application Status Milestone	Application Track
Edit Pre-Project Application 2000808: 123 Main Back Office	Johnson Property Corp	123 Main Back Office	2000808	12/22/2020 11:36 AM EST	Ontario IMO	Pre-project application	

05 Click **Delete** on the bottom left of the page.





06 Click **Delete Application**.

SAVE ON ENERGY
POWER WHAT'S NEXT

EDITING AN APPLICATION

TECHNICAL REVIEWER EDITING AN APPLICATION

The Save on Energy Technical Reviewer can make edits and approve the application **without having to send it back to the Applicant** to make or approve the changes.

If there are edits to be made once the Applicant submits an application for Pre-Project Application Review, the Save on Energy Technical Reviewer can make these edits and approve the application to move the status to Pre-Project Application Approved.

The **Applicant** and **Applicant Representative** can review the changes under **History and Comments**.

History and Comments

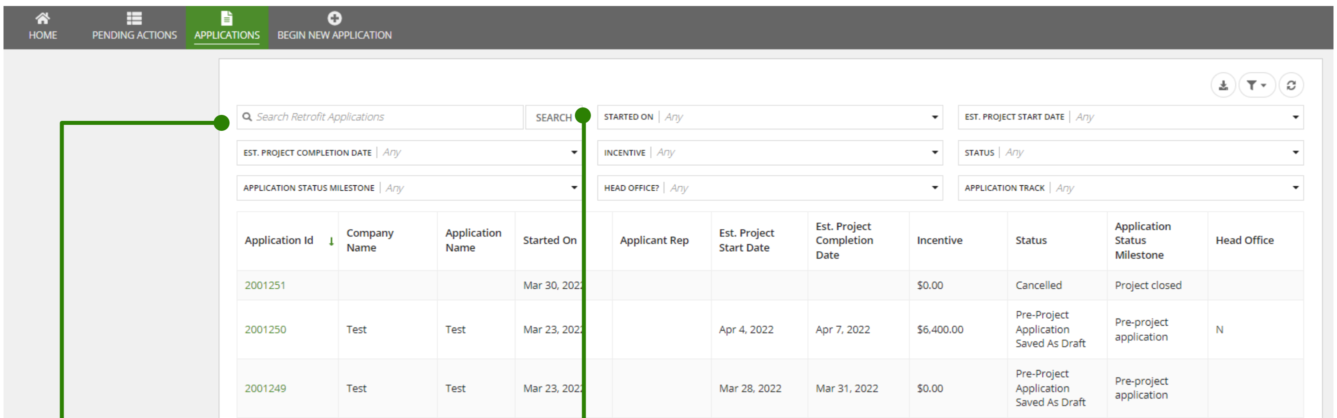
User	User Role	Action Type	Action	Submitted To	Date and Time (EST)	Comment
	[redacted]	Reviewed by Service Provider Analyst	Accept	Applicant	10/28/2021 12:07 PM	
	[redacted]	Service Provider Analyst Comment	Save Changes	None	10/28/2021 12:06 PM	
	[redacted]	Service Provider Analyst Comment	Save Changes	None	10/28/2021 12:06 PM	
	[redacted]	Service Provider Analyst Comment	Allow SP Edits	None	10/28/2021 12:04 PM	
	[redacted]	Routed by Service Provider Analyst	Route Application	Service Provider Analyst	10/28/2021 12:03 PM	
	Applicant	Submitted by Applicant	The application has been submitted and confirmed, and the applicant agreed to the PA		10/28/2021 11:29 AM	
	Applicant	Applicant Comment	Submit	None	10/28/2021 11:28 AM	
	Applicant	Applicant Comment	Save to Draft	None	10/28/2021 09:30 AM	

8 items

EDITING AN APPLICATION

The Save on Energy Technical Reviewer may need to return an application with recommended edits. **Applicants** or **Applicant Representatives** can make 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**.

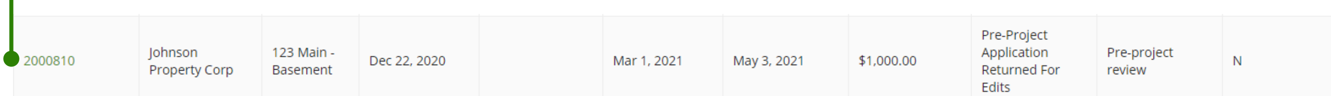
01 Click the **Applications** tab.



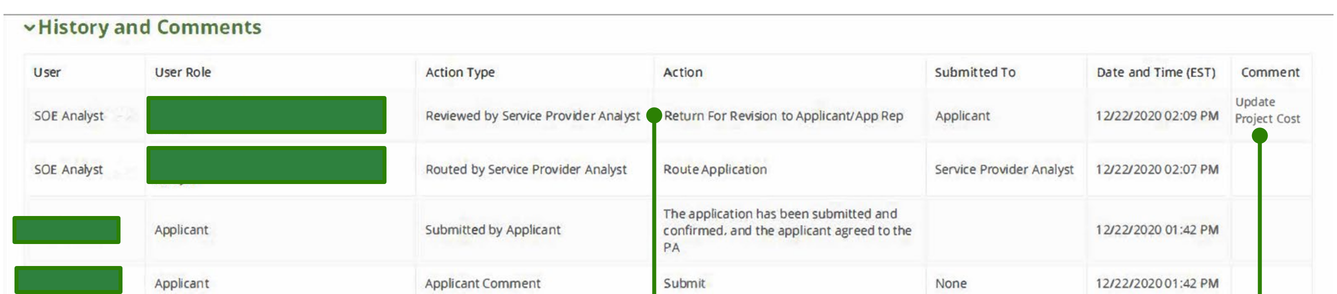
02 Enter the Application ID.

03 Click **Search**.

04 Click on the Application ID.



05 Click the **History and Comments** section to review any comments made by the Save on Energy Technical Reviewer.

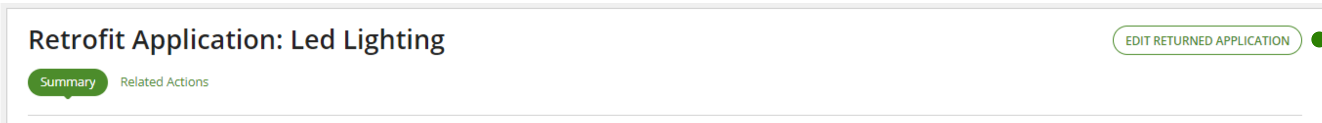


The **Return for Revision** action indicates that the Save on Energy Technical Reviewer has suggested edits.

The edits recommended by the Save on Energy Technical Reviewer are described in the **Comment** column.

EDITING AN APPLICATION

06 Click **Edit Returned Application** at the top right of the page.

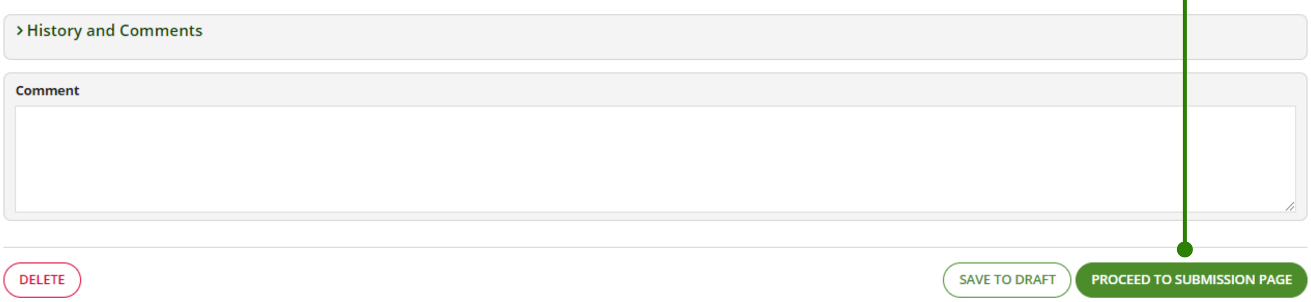


Note: If you receive an error message after clicking "Edit Returned Application," please ensure the application is not open under the Applicants or Applicant Representatives "Pending Actions" tab. If the issue persists, please reach out to a Save on Energy Technical Reviewer for assistance.

07 Make the required edits to the application.

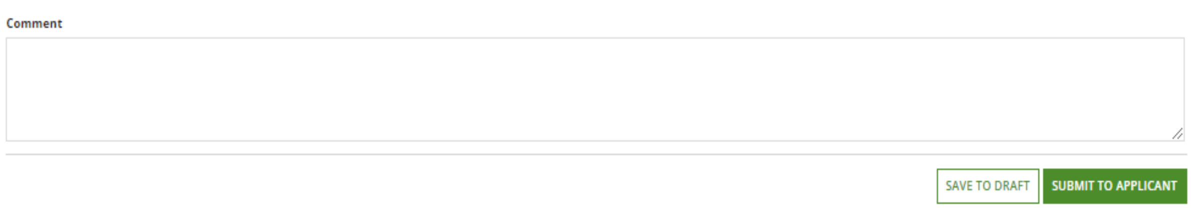
08 Enter a comment, if required.

09 Click **Proceed to Submission Page**.



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

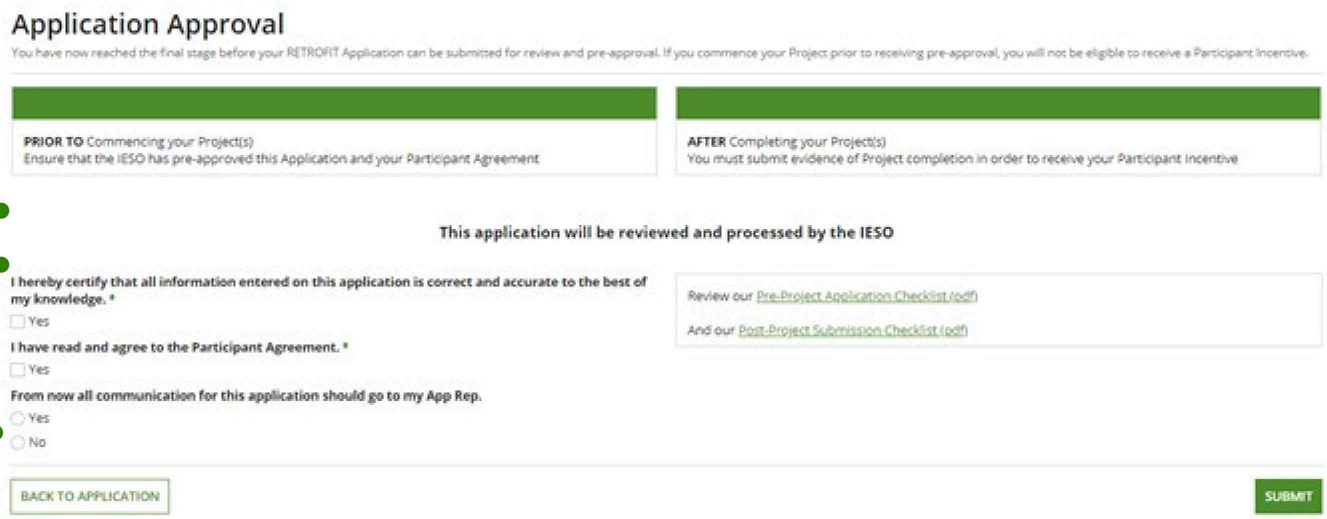
10 Click **Submit to Applicant**.



Enter a comment to the Applicant if required.

EDITING AN APPLICATION

11 The applicant will select **Yes** to indicate that all the information in the application is correct and to indicate that they have read and agree to the Participant Agreement. This is where Applicants agree to the Terms and Conditions of the program under which they will receive the incentive. Any questions about the Participant Agreement can be directed to a Save on Energy Representative.



12 If you wish to have your Applicant Representative handle all communication with the Service Provider Technical Reviewer during the review process of your application, select **Yes**.

13 Click **Submit**.

The application will now be forwarded to the Save on Energy Technical Reviewer for review.

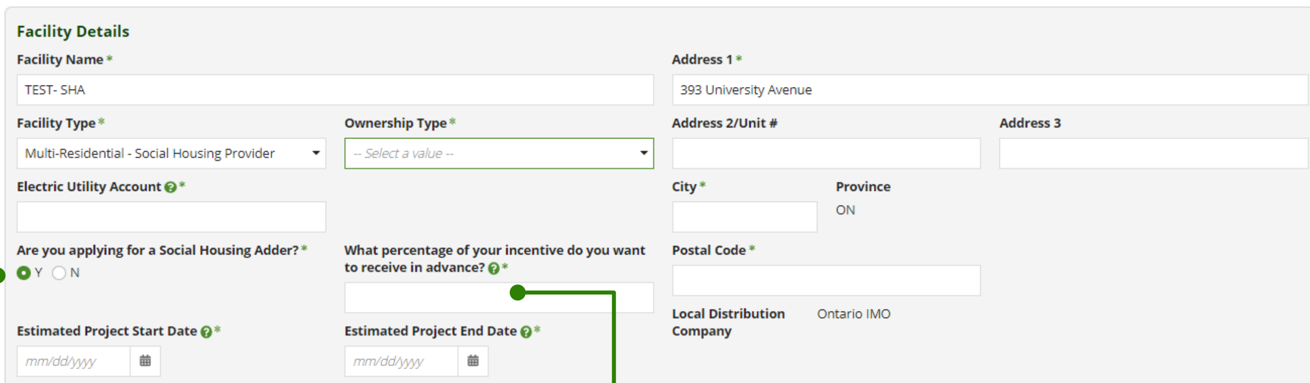
SUBMITTING AN ADVANCE INCENTIVE REQUEST

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 application's initial review, not after the application's pre-approval.

APPLYING FOR SOCIAL HOUSING INCENTIVE

You can apply for a **social housing adder** if your facility is a social housing provider.

01 Select **Multi-Residential – Social Housing Provider** when completing the **Facility Type** of the **Basic Details** section for the facility.

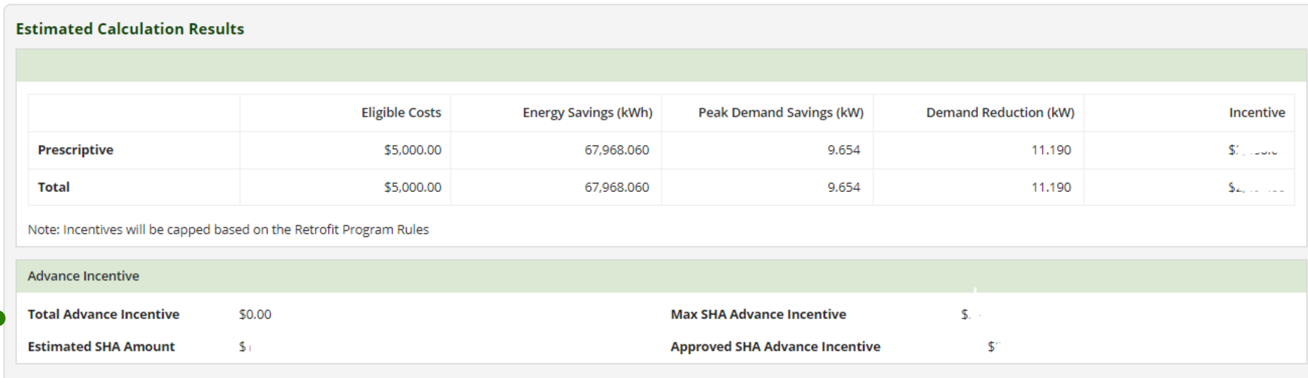


02 Select **Y** for Social Housing Adder.

03 Enter the **percentage** of the incentive that you would like to receive in advance. The maximum value is **50%**.

APPLYING FOR SOCIAL HOUSING INCENTIVE

04 Complete the rest of the facility information and **submit the facility** (see **Adding Facilities** on page 46).


Estimated Calculation Results

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	$5,000.00	67,968.060	9.654	11.190	[illegible]
Total	$5,000.00	67,968.060	9.654	11.190	[illegible]

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

Advance Incentive

Total Advance Incentive	$0.00	**Max SHA Advance Incentive**	[illegible]
Estimated SHA Amount	[illegible]	**Approved SHA Advance Incentive**	[illegible]

The advance incentive amounts are automatically calculated once all required facility information is entered.

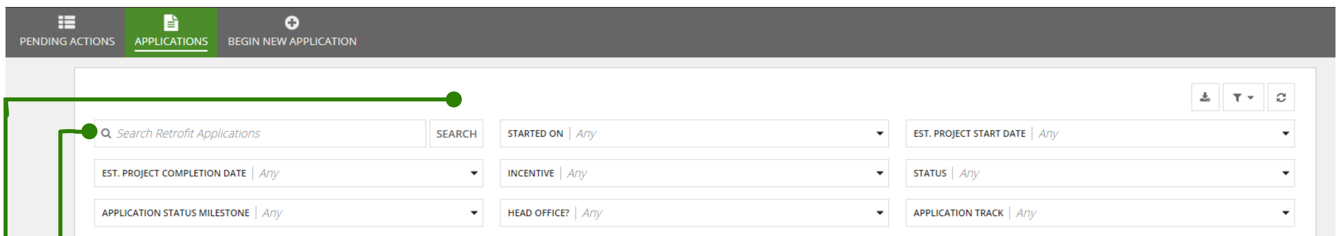
The application will now include the request for a social housing advance incentive. The request will be subject to review by a Save on Energy Technical Reviewer.

SUBMITTING AN ADVANCE INCENTIVE INVOICE

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

> **Note**: The final incentive invoice for the complete incentive amount may only be submitted after the post-project approval.

01 Click on the **Applications** tab.



02 Enter the Application ID.

03 Click the **Search** button.

04 Click on 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
2000811	Johnson Property Corp	5 Social Housing Way	Dec 22, 2020		Jan 4, 2021	Mar 1, 2021	$750.00	Pre-Project Application Approved	Pre-project review	N

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

Estimated Calculation Results

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	$5,000.00	67,968.060	9.654	11.190	[illegible]
Total	$5,000.00	67,968.060	9.654	11.190	[illegible]

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

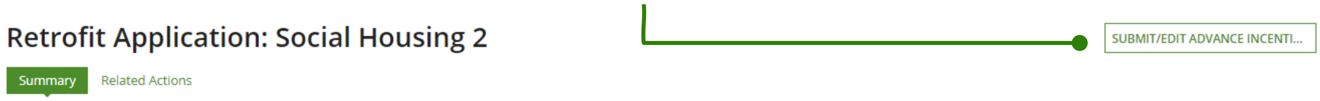
Advance Incentive

Total Advance Incentive	$0.00	**Max SHA Advance Incentive**	[illegible]
Estimated SHA Amount	[illegible]	**Approved SHA Advance Incentive**	[illegible]

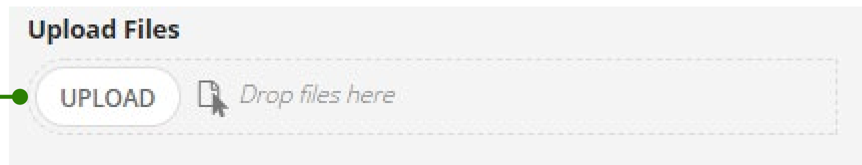
This is the maximum amount you can submit an invoice for.

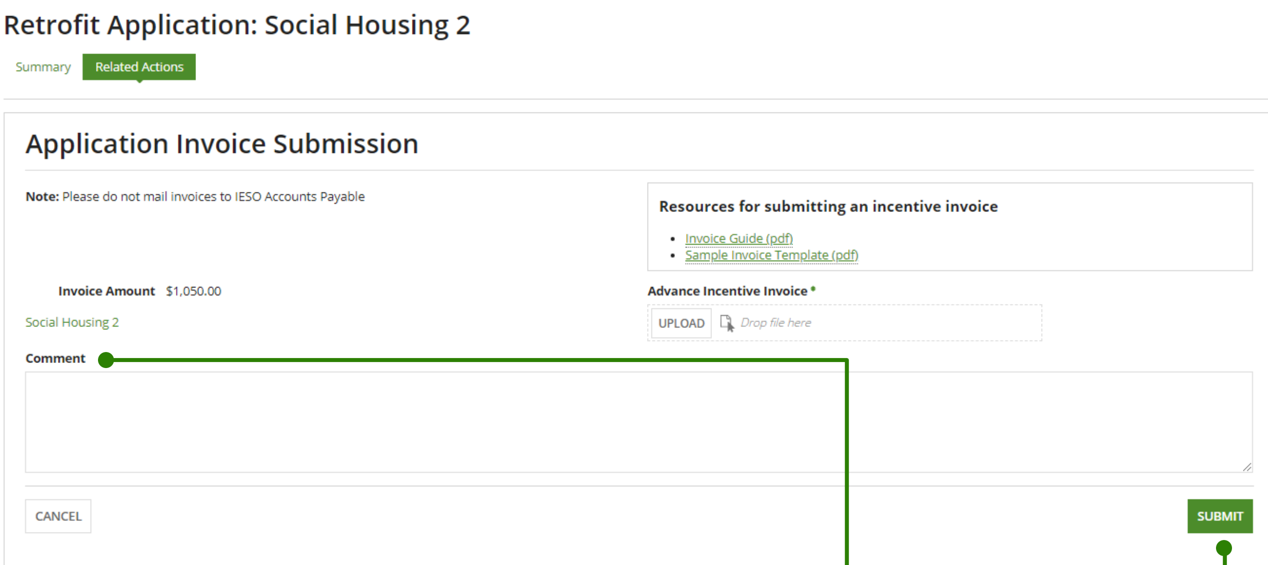
SUBMITTING AN ADVANCE INCENTIVE REQUEST

06 Click **Submit/Edit Advanced Incentive Invoice** at the top right of the page.



07 Click **Upload**.





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

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

10 Click **Submit**.

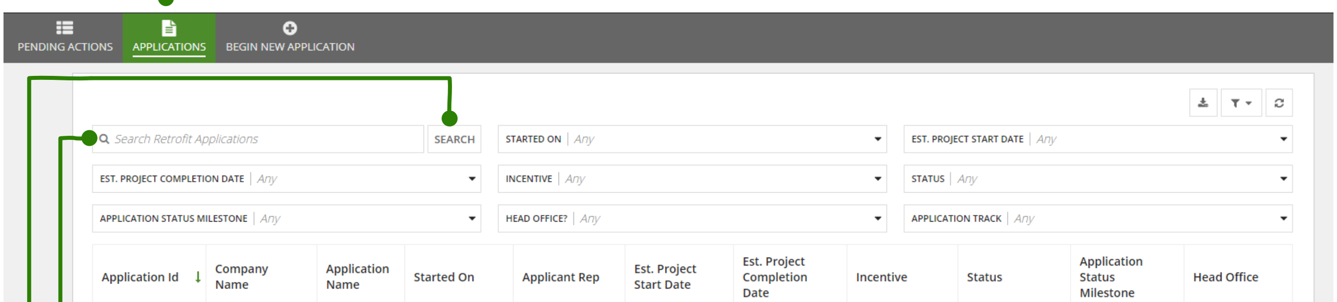
The Save on Energy Technical Reviewer will now receive a notification to review the advance incentive invoice.

AMENDING AN APPROVED APPLICATION

The **Applicant** or **Applicant Representative** can amend an application after it has been pre-approved by the Save on Energy Technical Reviewer if the project has not been started.

Note: Once a post-project submission has been started, the pre-project application cannot be amended. An amendment can only be completed once per application.

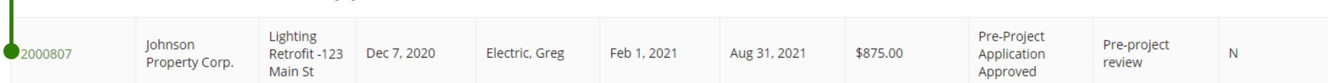
01 Click on the **Applications** tab.



02 Enter the Application ID.

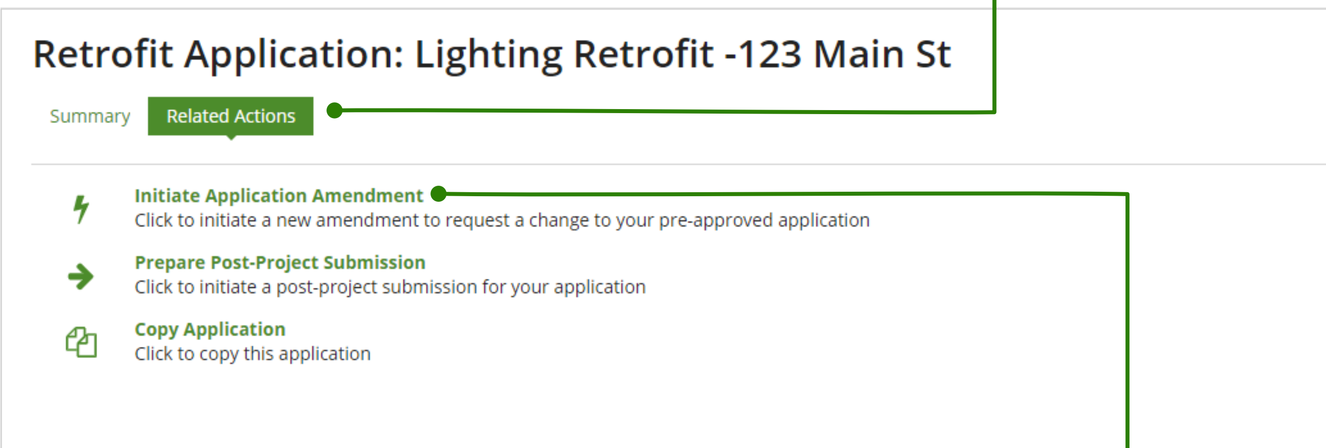
03 Click **Search**.

04 Click on the Application ID.



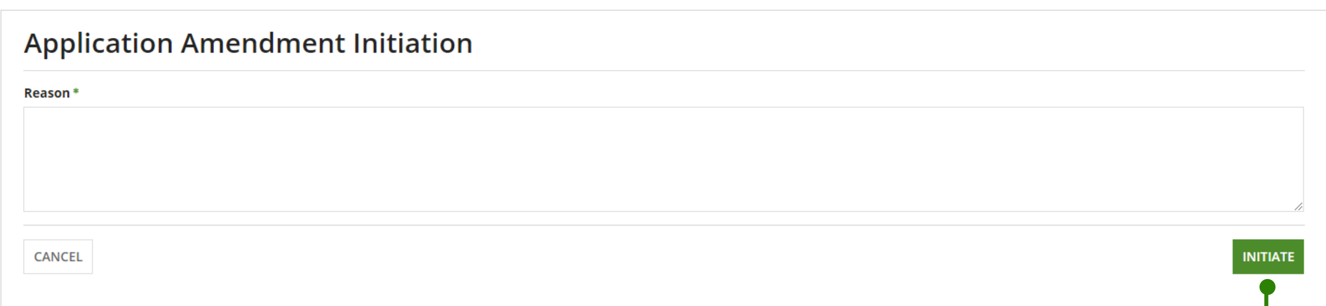
AMENDING AN APPROVED APPLICATION

05 Click on the **Related Actions** tab.



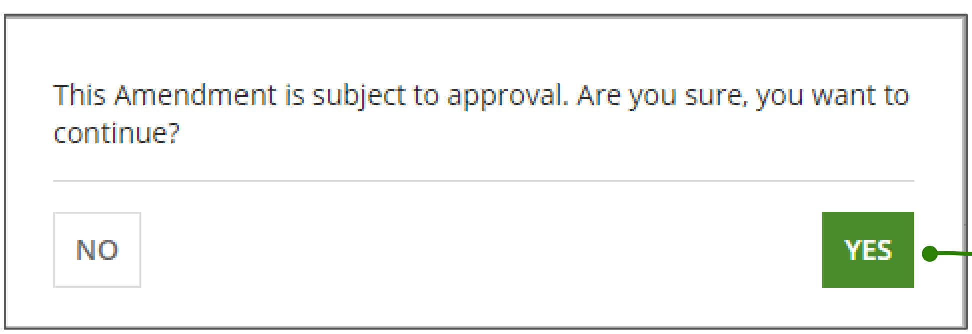
06 Click **Initiate Application Amendment**.

07 Enter the reason for the amendment. This comment is mandatory.



08 Click **Initiate**.

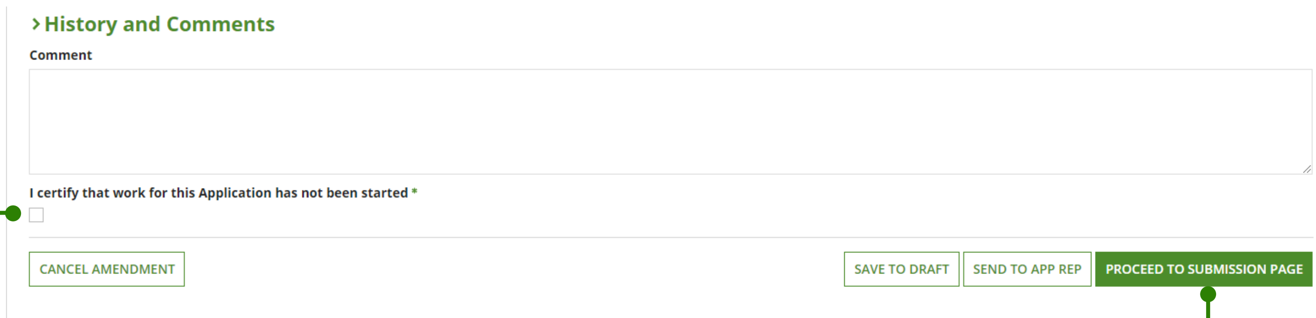
09 Click **Yes**.



AMENDING AN APPROVED APPLICATION

10 Make any required changes to the application.

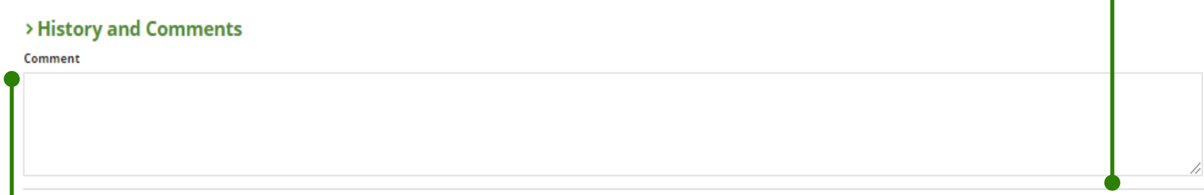
11 Select the box to certify work for the application has not been started.



12 Click **Proceed to Submission Page**.

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 Technical Reviewer.

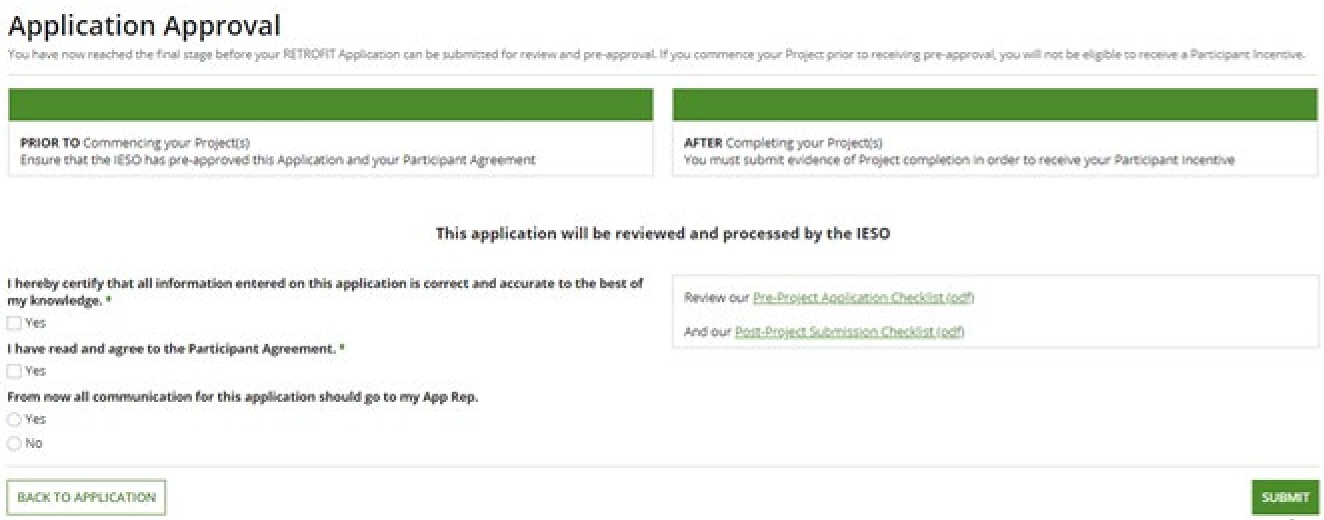
13 Click **Submit to Applicant**.



Enter a comment to the Applicant if required.

AMENDING AN APPROVED APPLICATION

14 The Applicant will select **Yes** to indicate that all the information in the application is correct and to indicate that they have read an agree to the Participant Agreement. This is where Applicants agree to the Terms and Conditions of the program under which they will receive the incentive. Any questions about the Participant Agreement can be directed to a Save on Energy Representative.


Application Approval

You have now reached the final stage before your RETROFIT Application can be submitted 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 IESO 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

This application will be reviewed and processed by the IESO

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

Review our Pre-Project Application Checklist (pdf)
And our Post-Project Submission Checklist (pdf)

BACK TO APPLICATION
SUBMIT

15 If you wish to have your Applicant Representative handle all communication with the Service Provider Technical Reviewer during the review of your application, select **Yes**.

16 Click **Submit**.

The Save on Energy Technical Reviewer will now receive a notification to review the amended application.

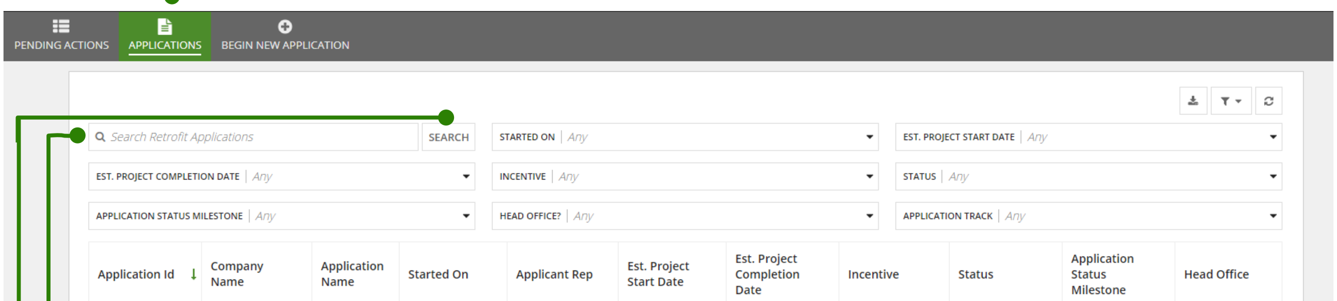
Post-Project Submissions

CREATING A POST-PROJECT SUBMISSION

The Applicant or Applicant Representative creates the post-project submission once the application status is "Pre-Project Application Approved" and the project has been completed.

BEGINNING A POST-PROJECT SUBMISSION

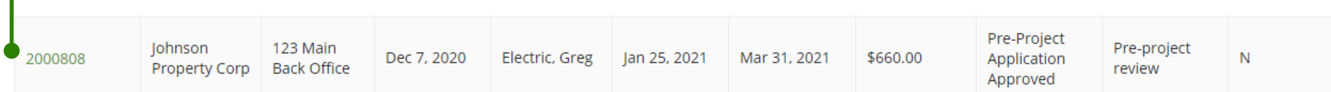
01 Click on the **Applications** tab.



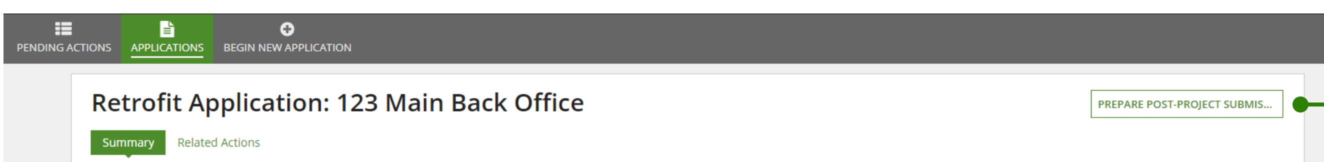
02 Enter the Application ID.

03 Click **Search**.

04 Click on the Application ID.



05 Click **Prepare Post-Project Submission** at the top right of the page.



BEGINNING A POST-PROJECT SUBMISSION

06 Click **Continue to Application**.

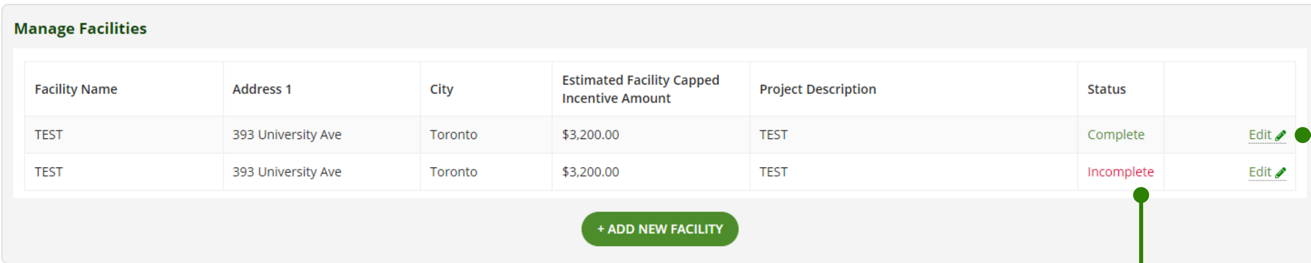
This step creates a post-project submission to be completed and brings you to the post-project submission main page.

Note: If you receive an error message after clicking "Prepare Post-Project Submission," please ensure the application is not open under the Applicant or Applicant Representative "Pending Actions" tab. If the issue persists, please reach out to a Save on Energy Technical Reviewer for assistance.

ENTERING PROJECT DATA

Sections of the application must be updated before the post-project submission can be submitted.

01 Click the **Edit** button under the **Manage Facilities** section to open and edit a facility.


Manage Facilities

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status	
TEST	393 University Ave	Toronto	$3,200.00	TEST	Complete	Edit
TEST	393 University Ave	Toronto	$3,200.00	TEST	Incomplete	Edit

+ ADD NEW FACILITY

Facility status will show as "Incomplete" until steps 2-11 are completed.

02 Update the **project start date** and **project end date**, if different than initial submission.

The estimated project start date and end date from the pre-approval are shown as well.

ENTERING PROJECT DATA

03 Click the **Edit** button under the **Prescriptive Measures** section to open a prescriptive measure.

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status		
Lighting (2021-2024)	8' T8 LED Lamp	<= 43W >= 3200 Lumens	300	$2,400.00	Incomplete	Edit	✖

Measure status will show as "Incomplete" until steps 4-6 are completed.

04 Enter the **actual quantity** for the measure.

05 Update any other mandatory fields as required.

Measure Category Lighting (2021-2024)
End Use Lighting - Other Commercial Buildings
Conservation Measure Name LED REFLECTOR (FLOOD/SPOT) LAMP PIN & SCREW BASE
Conservation Measure Description <= 20W >= 800 Lumens
Incentive Per Unit $8.00
Eligibility Criteria This measure is applicable to pin and/or screw base BR's, PAR's, MR's, and R's style LED lamps.The LED lamp must be classified as a Reflector (flood/spot) Lamp by Energy Star and must be approved and listed on the Energy Star Certified Light Bulbs List
Assumed Base Case 43W - 60W Halogen or Incandescent Lamp

Back to Facility

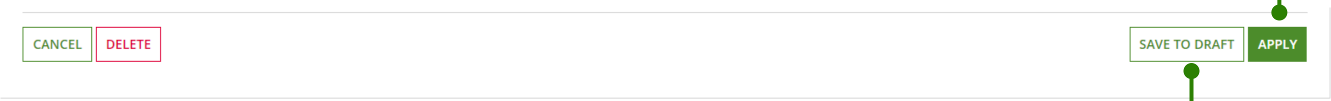
Manufacturer HX
Actual Quantity 82 — Estimated value: 82
Measure Unit per lamp
Model Number HXNF-L230EXP
ES DLC Code
kWh Savings 9,019.549 kWh — Estimated value: 9,019.549 kWh
Peak Demand Savings 1.424 kW — Estimated value: 1.424 kW
kW Reduction 3.157 kW — Estimated value: 3.157 kW
Actual Incentive $656.00 — Estimated value: $656

The kWh Savings, Peak Demand Savings, and kW Reduction values are automatically calculated when you enter the actual quantity.

The estimated values from the pre-approval are provided.

ENTERING PROJECT DATA

06 Click **Apply** to add the measure to the facilty.

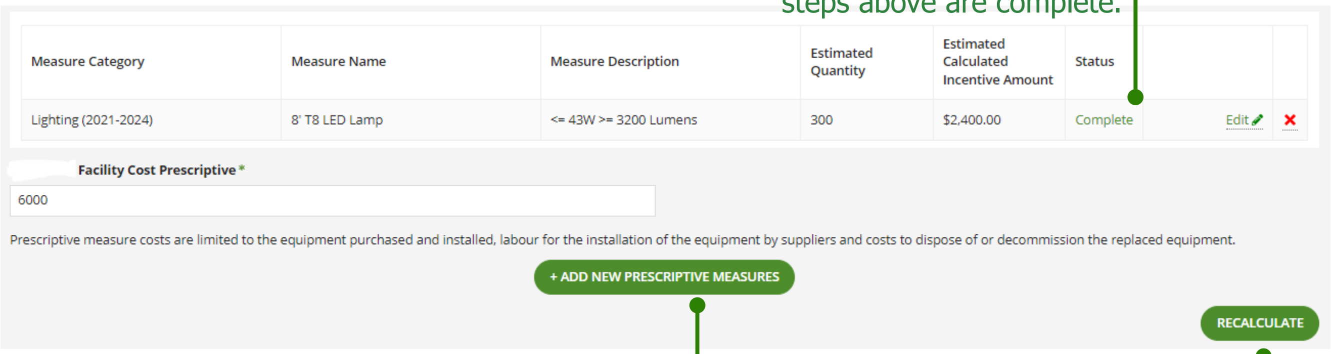


Click **Save to Draft** if you want to save a draft of the measure.

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

08 Enter the **actual facility cost** for all prescriptive measures. Click anywhere on the page for the **Recalculate** button to appear.

Prescriptive measures will show as complete when steps above are complete.



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 pre-approved.

09 Click **Recalculate**.

SAVE ON ENERGY
POWER WHAT'S NEXT

ENTERING PROJECT DATA

10 Review the **Actual Calculation Results** section for the facility.

	Eligible Costs	Energy Savings (kWh)	Peak Demand Savings (kW)	Demand Reduction (kW)	Incentive
Prescriptive	$7,800.00 Estimated value: $8,000.00	23,747.384 Estimated value: 23,747.384	3.748 Estimated value: 3.748	8.312 Estimated value: 8.312	$2,586.00 Estimated value: $2,586.00
Total	$7,800.00 Estimated value: $8,000.00	23,747.384 Estimated value: 23,747.384	3.748 Estimated value: 3.748	8.312 Estimated value: 8.312	$2,586.00 Estimated value: $2,586.00

Project Type Prescriptive

BACK TO APPLICATION | DELETE | SAVE TO DRAFT | APPLY

11 Click **Apply** to confirm the updates.

12 Repeat **Steps 1-11** if your application has more than one facility.

13 Under the **Manage Facilities** section, the facility will now show a status of "**Complete.**"

Manage Facilities

Facility Name	Address 1	City	Facility Capped Incentive Amount	Project Description	Status	
TEST- SHA	393 University Avenue	Toronto	$13,960.00	TEST - Social Housing Adder	Complete	Edit
TEST- SHA	393 University Avenue	Toronto	$2,400.00	TEST - Social Housing Adder	Complete	Edit

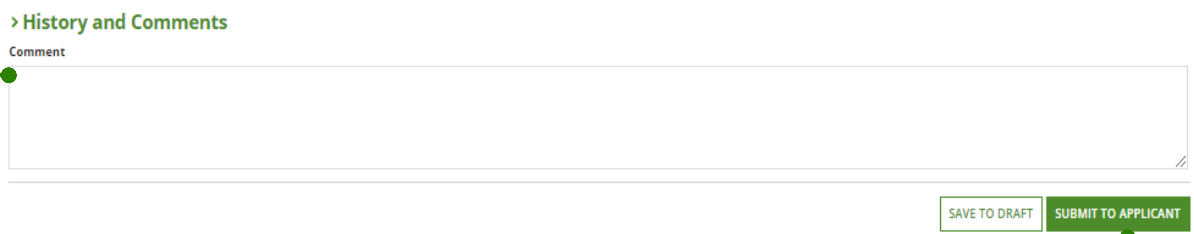
+ ADD NEW FACILITY

Once all facilities in the application are marked as "Complete," the post-project submission is ready to be submitted.

FORWARDING THE POST-PROJECT SUBMISSION TO THE APPLICANT

Applicant Representatives can prepare the application for post-project submission, but it must be sent to the Applicant for final submission. Only the **Applicant** can submit an application to the Save on Energy Techincal Reviewer.

01 Enter a comment to the Applicant if required.



02 Click **Submit to Applicant**.

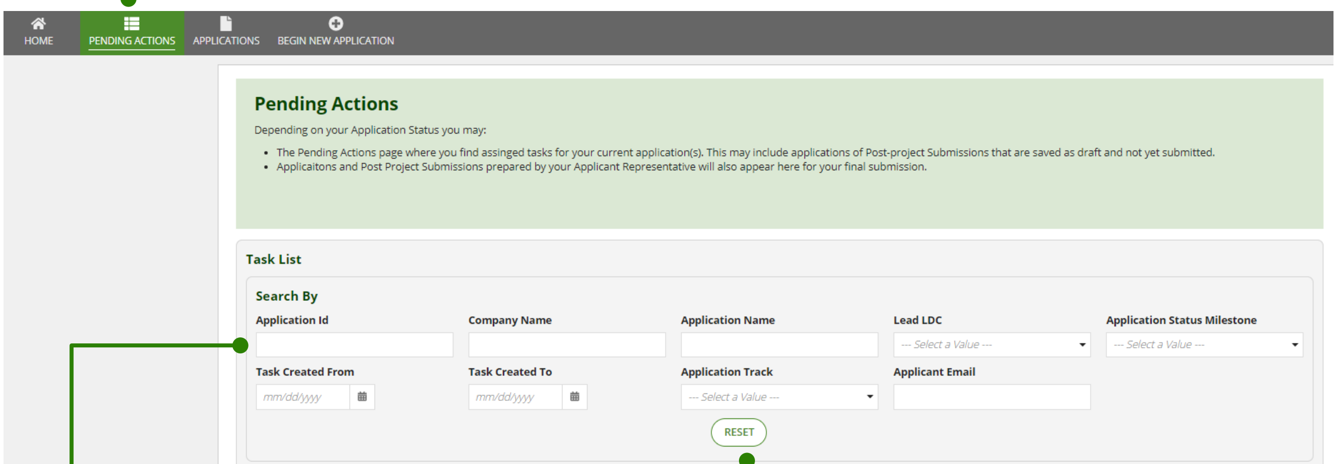
The Applicant will receive an email notification to review the post-project submission.

SUBMITTING THE POST-PROJECT SUBMISSION

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

> If the Applicant created the post-project submission, continue to Step 6.
>
> If an Applicant Representative created the post-project submission, the Applicant must review it before submission. Continue to Step 1.

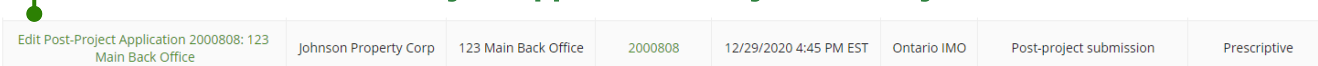
01 Click the **Pending Actions** tab.



02 Enter the Application ID.

03 Click **Reset**, located below the "Task Created From" field.

04 Click on **Edit Post-Project Application "Project ID: Project Name"**

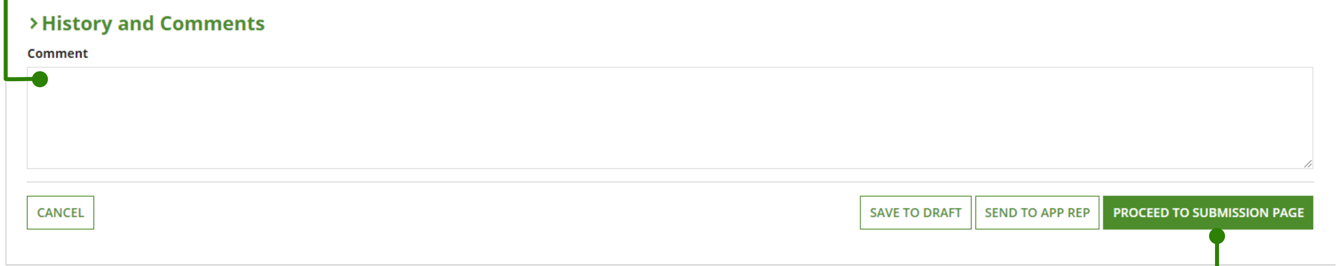


05 Review all components of the post-project submission and make any edits where required.

SAVE ON ENERGY
POWER WHAT'S NEXT

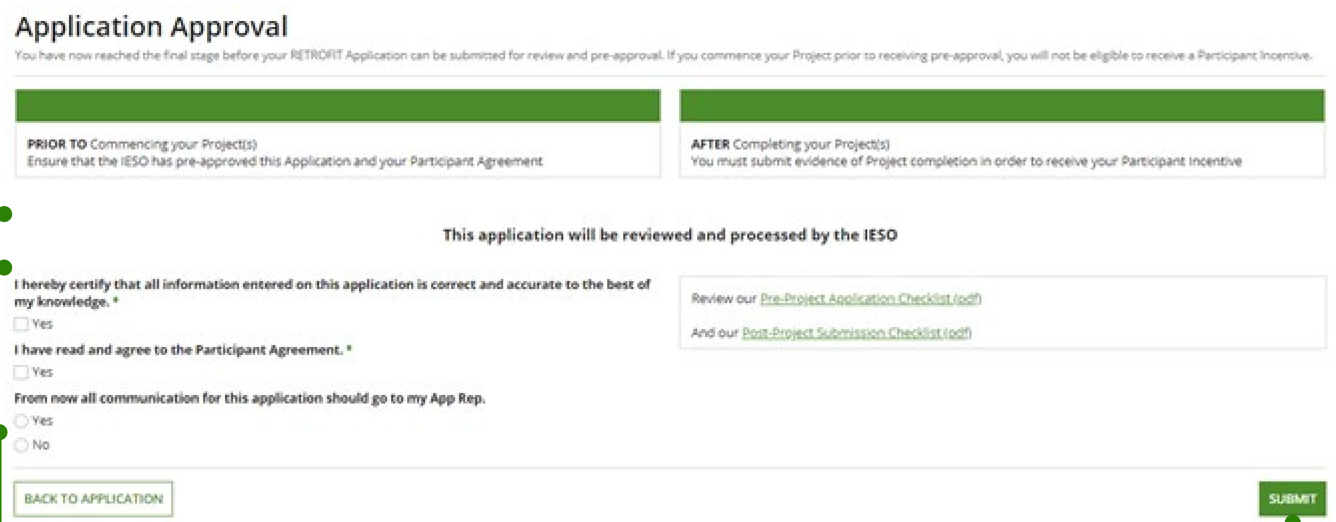
SUBMITTING THE POST-PROJECT SUBMISSION

06 Enter a comment, if required.



07 Click **Proceed to Submission Page**.

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. This is where Applicants agree to the Terms and Conditions of the program under which they will receive the incentive. Any questions about the Participant Agreement can be directed to a Save on Energy Representative.



09 If you wish to have your Applicant Representative handle all communication with the Service Provider Technical Reviewer during the review process of your application, select **Yes**.

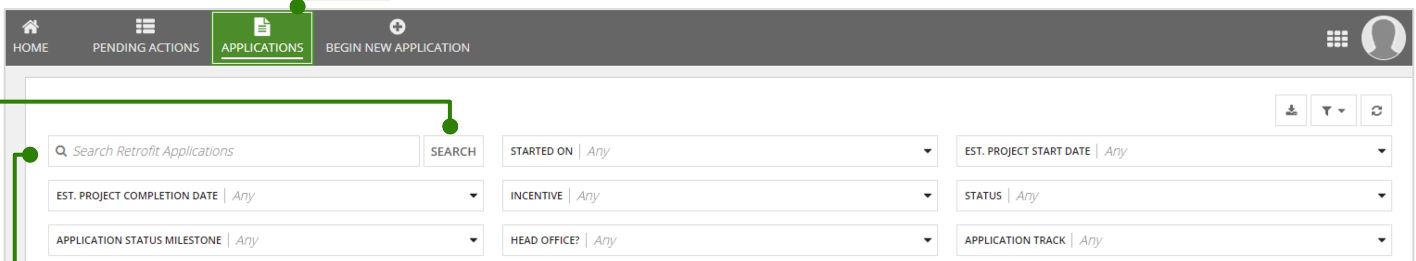
10 Click **Submit**.

The Save on Energy Technical Reviewer will now receive a notification to review the post-project submission.

Submitting an Incentive Invoice

A final incentive invoice must be submitted by the **Applicant** once the post-project submission has been approved by the Save on Energy Technical Reviewer and the application status is **Post-Project Submission Approved**.

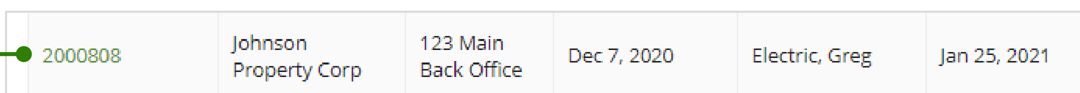
01 Click on the **Applications** tab.



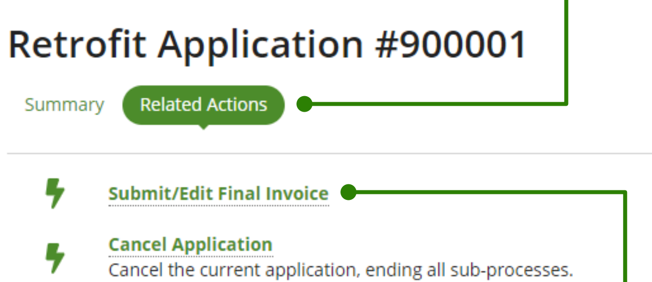
02 Enter the **Application ID.**

03 Click **Search**.

04 Click the **Application ID**.



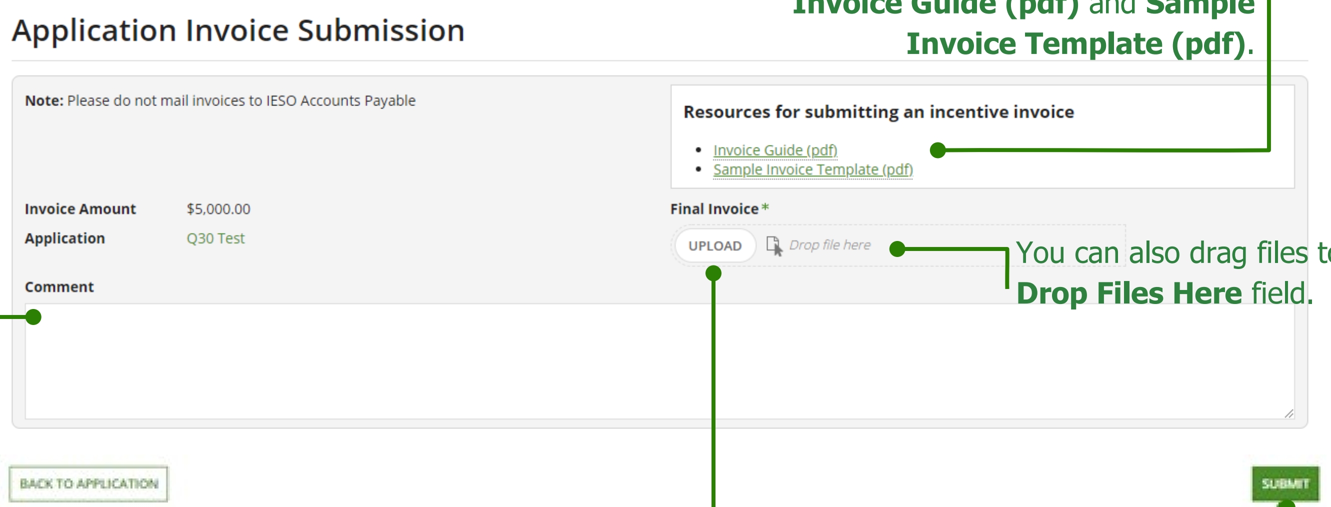
05 Click **Related Actions**.



06 Click **Submit/Edit Final Invoice**.

SUBMITTING AN INCENTIVE INVOICE

If you are unsure what information to include in your invoice, please see **Invoice Guide (pdf)** and **Sample Invoice Template (pdf)**.



You can also drag files to the **Drop Files Here** field.

07 Click **Upload.**

08 Double-click the document you want to attach.

09 Enter a comment.

10 Click **Submit**.

The Save on Energy Technical Reviewer will now receive an email notification to review the invoice.