



# RETROFIT PROGRAM DIGITAL USER GUIDE

For Retrofit Applicants and Applicant Representatives

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# Getting Started

## Retrofit Program Roles

There are two roles involved in creating and submitting a Retrofit project application and post-project submission.

Role	Description
<b>Applicant</b>	<p>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.</p> <p>Only the Applicant can submit project documentation to the LDC.</p>
<b>Applicant Representative</b>	<p>An Applicant Representative is an optional surrogate that creates the application and post-project submission on the Applicant's behalf.</p> <p>An Applicant Representative cannot submit project documentation to the LDC.</p>

# Registering for the Retrofit Program

As a new **Applicant** or **Applicant Representative** you need to complete two registrations.

## Step 1: Registering on the Registration portal

To register for the Retrofit program, you must first register on the **Registration portal**. This portal provides access to several CDM IS applications, including the Retrofit program.

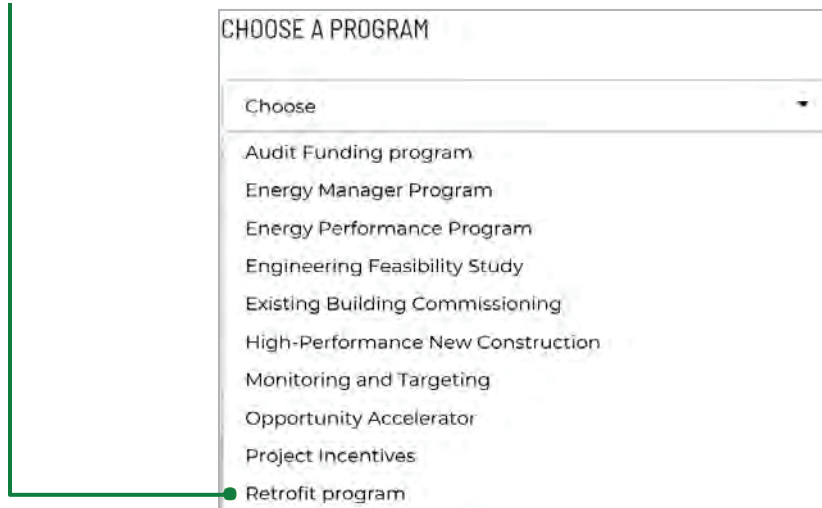
**01** Open [www.saveonenergy.ca](http://www.saveonenergy.ca).

**02** Hover over **For Business and Industry**.

**03** Click **Programs and Incentives**.



**04** Select **Retrofit program**.



# Registering for the Retrofit Program

## Step 1: Registering on the Registration Portal

**05** Click **Register for an account**.

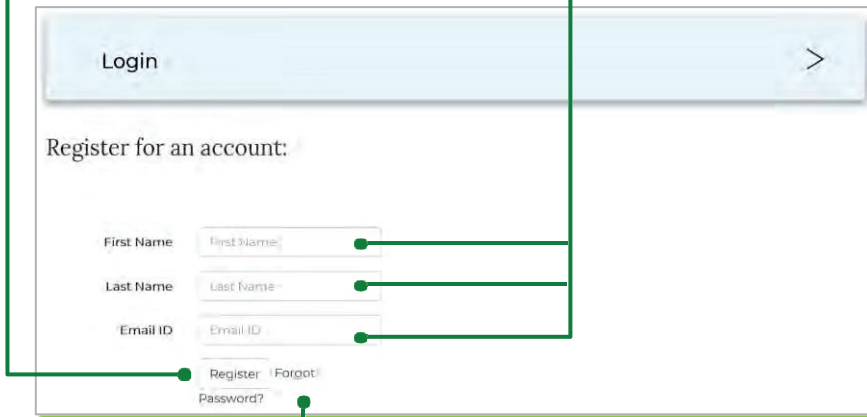


**Applying for Retrofit program incentives?**

The Retrofit application portal has moved to [www.retrofitportal.ca](http://www.retrofitportal.ca).  
[Register for an account](#) or [log in now](#).  
[Learn how to apply for Retrofit program incentives.](#)

**06** Enter your first name, last name and a valid email address.

**07** Click **Register**.



Login >

Register for an account:

First Name

Last Name

Email ID

Password?

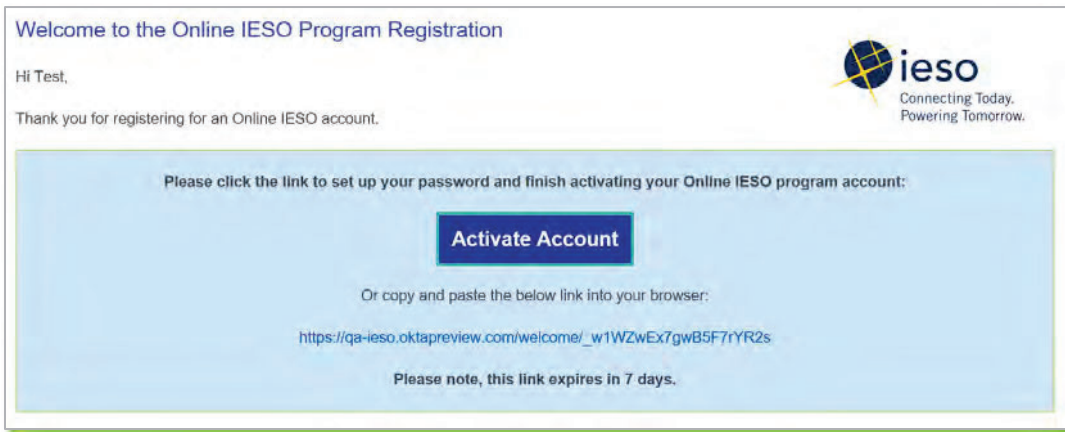
When you click Register, the following message will appear here and an activation email is sent to your email address.

"Please follow the instructions in the email to complete registration."

# Registering for the Retrofit Program

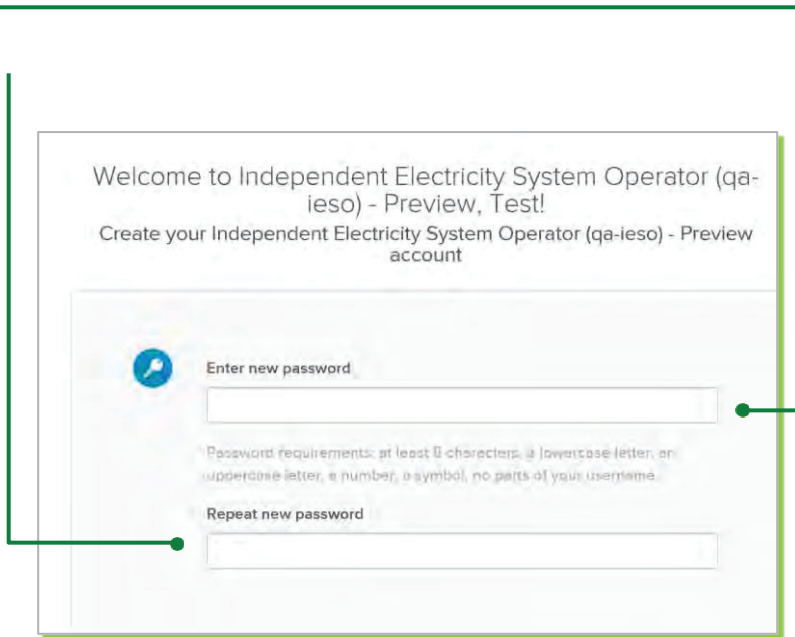
## Step 1: Registering on the Registration Portal

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



**09** Enter a password.

**10** Re-enter the same password.

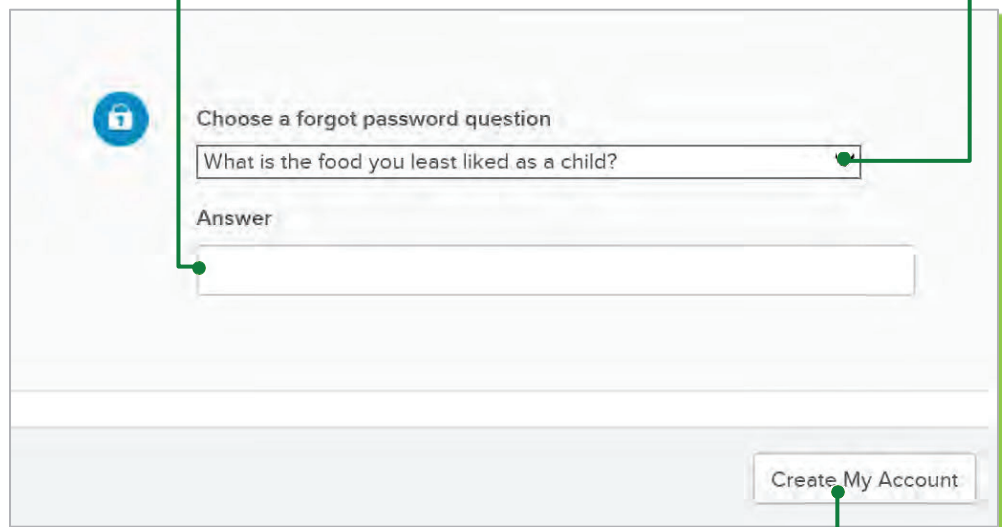


# Registering for the Retrofit Program

## Step 1: Registering on the Registration 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.

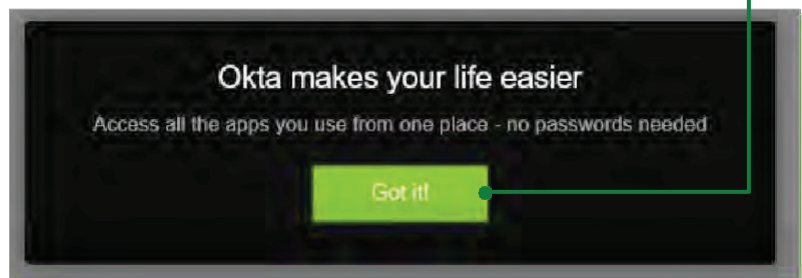


The screenshot shows a registration form with a blue padlock icon on the left. The text reads "Choose a forgot password question". Below this is a text input field containing "What is the food you least liked as a child?". Underneath is an "Answer" label followed by another text input field. At the bottom right of the form is a button labeled "Create My Account". Green lines connect the numbered instructions to the corresponding fields and button.

**13** Click **Create My Account**.

This step brings you to the Application Portal.

**14** Click **Got it!** to close the dialogue box.



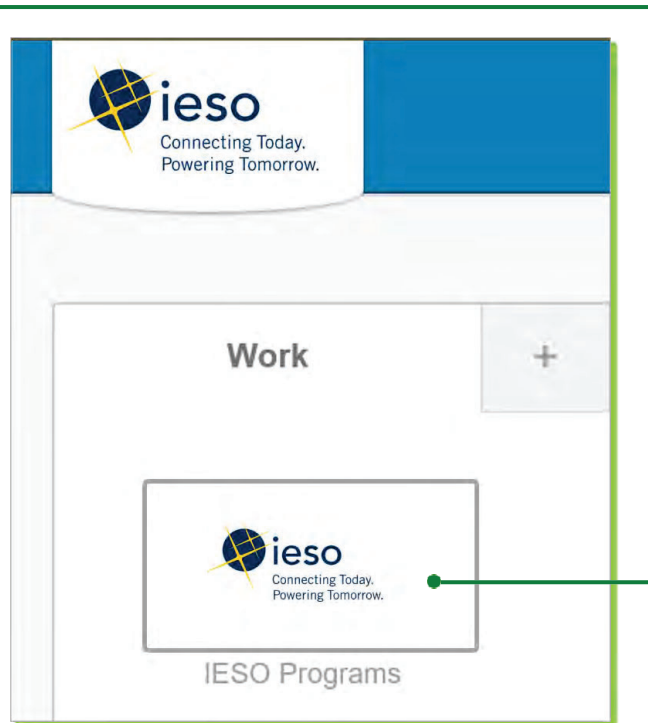
You can now register for the Retrofit program.



# 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.

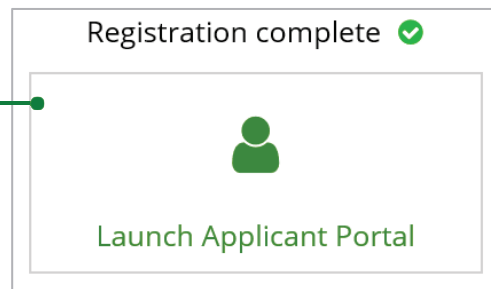
The screenshot shows a registration form titled "Register for Retrofit". The form includes the following fields and callouts:

- Account Type:** A callout box states "Select the account type. You can register as an Applicant, Applicant Representative or both." The form has radio buttons for "Applicant" and "Applicant Representative".
- Address Section:** A callout box states "Complete the address section." This section includes "Address 1\*", "Address 2", and "Address 3" text boxes.
- Contact Information:** Fields for "First Name\*" (containing "Test"), "Last Name\*" (containing "Tester"), "Email" (containing "palesilver0@demandsxz.com"), and "Phone Number\*" are present. A callout box says "Enter a contact number." pointing to the phone number field.
- Location:** Fields for "City", "Province\*" (a dropdown menu showing "Ontario"), and "Postal Code\*" are present.
- Source:** A field "Where did you hear about the Save on Energy Program?\*" with a dropdown menu showing "Canada". A callout box says "Select where you heard about the Save on Energy Program." pointing to this dropdown.
- Submission:** A green button labeled "COMPLETE REGISTRATION" is located at the bottom right of the form.

**04** Click

This final step completes your Retrofit program registration.

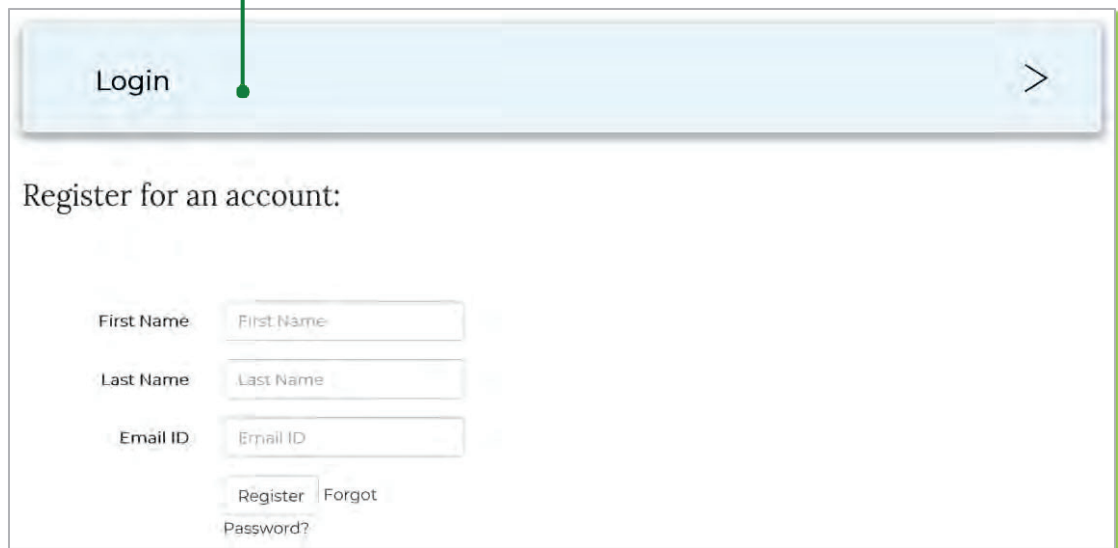
Click **Launch Applicant Portal** to open the Retrofit portal home page.



## Logging In

**01** Open the Retrofit portal login page:

**02** Click Login.



Login

Register for an account:

First Name

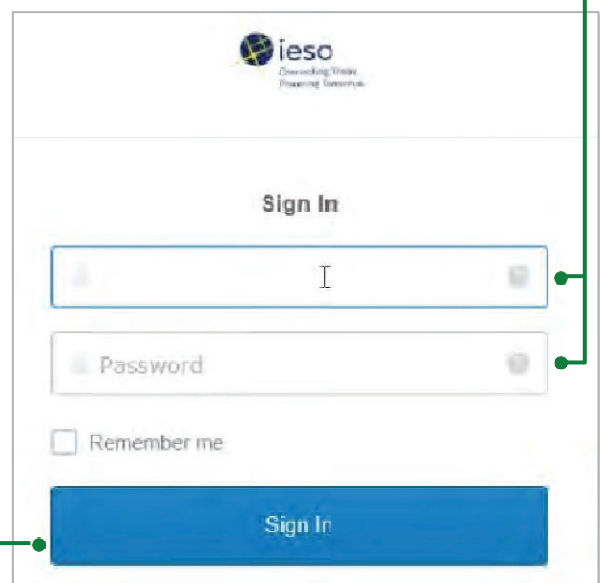
Last Name


Email ID

[Register](#) [Forgot Password?](#)

**03** Enter your username and password.

**04** Click Sign In.



 Connecting People. Powering Tomorrow.

Sign In

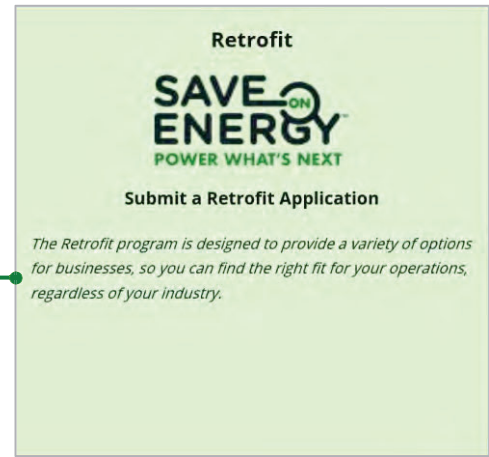
Password

Remember me

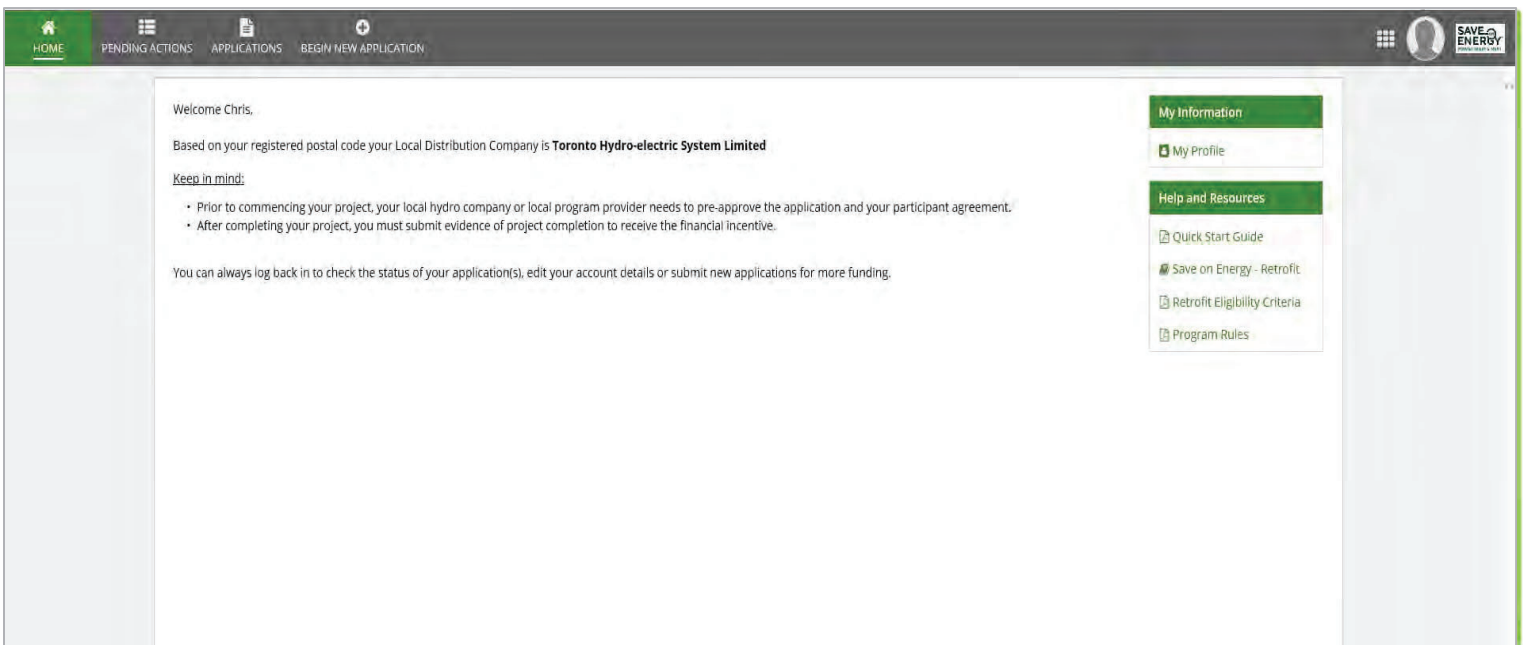
Sign In

# Logging In

**05** Click **Submit a Retrofit Application**.



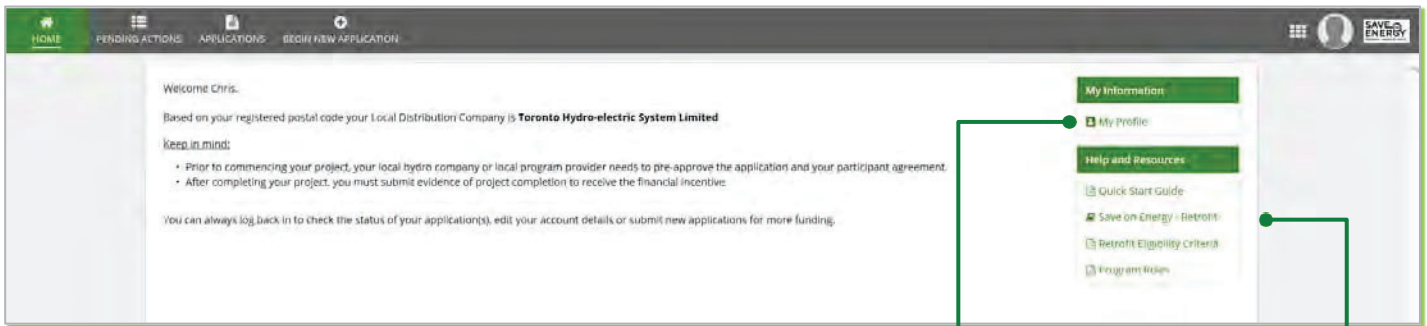
This final step opens the Retrofit Portal **Home** page.



# 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.

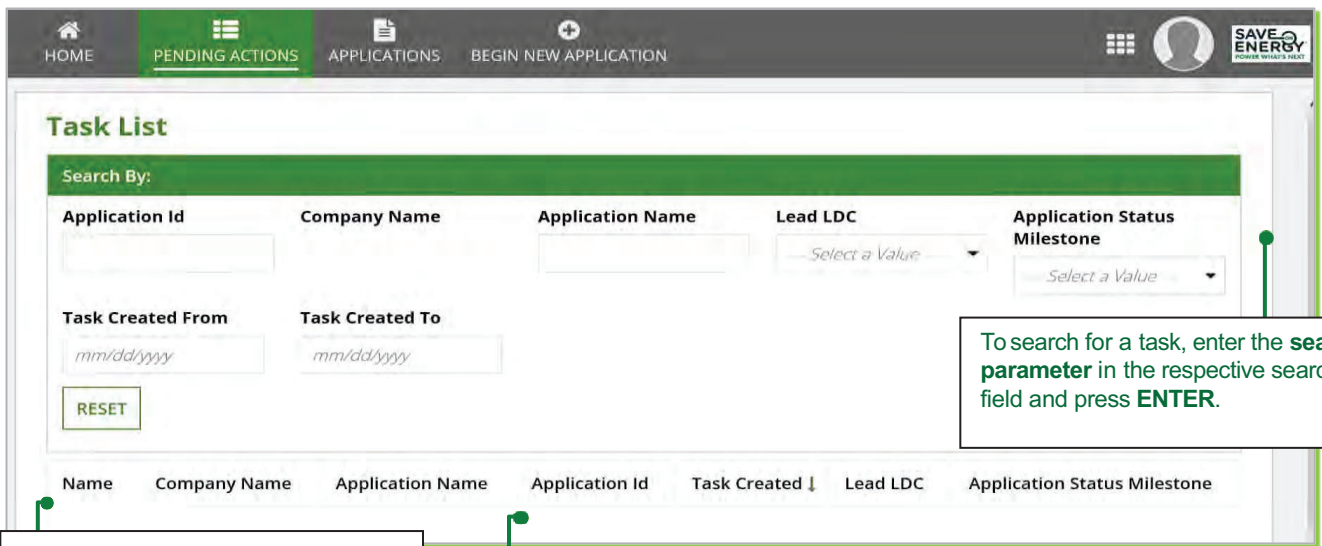


Click **My Profile** to view or edit your profile.

A variety of Retrofit program information is available

## Pending Actions

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



To search for a task, enter the **search parameter** in the respective search field and press **ENTER**.

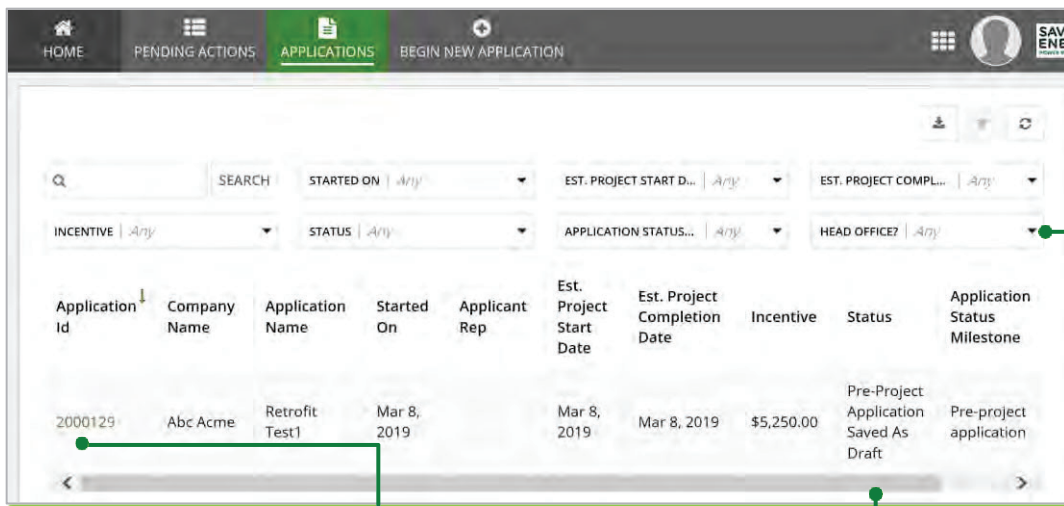
Click a **Task Name** to open the application in edit mode.

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 and post-project submissions.



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

Click an application ID to open the application.

The status of each application is displayed.

Click any header to sort your applications by that criteria.



# Project Applications

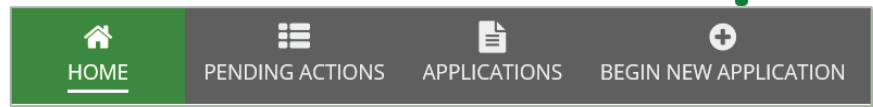
# Creating an Application

## Beginning the Application

The **Applicant** or **Applicant Representative** creates the application.

## Beginning the Application

**01** Click **BEGIN NEW APPLICATION**.



**02** Click **CONTINUE TO APPLICATION**.

### Begin a Retrofit Application

**RETROFIT PROGRAM APPLICATION REQUIREMENTS**

- Important:** Prior to commencing your projects, ensure that the LDC associated with the application has provided approval on the application.
- Both the Applicant and Applicant Representative must have registered for a User Account before they can use this Application.
- The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.
- Applicants are required to review the Terms and Conditions and the Participant Agreement and signify acceptance using the options available at the end of this Application. Alternatively, contact your LDC to obtain a copy of the Terms and Conditions and the Participant Agreement.
- Please ensure that all worksheets and supporting documentation for your Project(s) are uploaded to the CDM IS Application. Incomplete Applications will not be processed and will not be pre-approved by your local electric utility.
- For Head Office Applications, where you have Projects that involve more than one LDC, please ensure you have support from a Lead LDC before you begin your RETROFIT Application. If you do not, please contact [national.accounts@ieso.ca](mailto:national.accounts@ieso.ca). We will help you find a Lead local electric utility and support this project throughout the application process.

**For more information on Retrofit project eligibility, please**  
[Click Here](#)

Two green buttons are shown. The top button has a person icon and the text 'Continue to Application'. The bottom button has a group of people icon and the text 'Select an App Rep to Continue the Application'.

**NOTE:** After Completing your Project(s) you must submit evidence of Project completion in order to receive your Participant Incentive

An Applicant can click **SELECT AN APP REP TO CONTINUE THE APPLICATION** to assign the application to an Applicant Representative. See [p.36](#) for instructions on this task.



# Creating an Application

## Beginning the Application

The screenshot shows a web application interface for creating a new application. At the top, there is a navigation bar with 'PENDING ACTIONS', 'APPLICATIONS', and 'BEGIN NEW APPLICATION'. Below this is a large banner image featuring a glowing lightbulb with a green leaf. Underneath the banner, key application details are displayed in a grid:

<b>Project title</b>	<b>Application ID</b>	<b>Project status</b>	<b>Lead LDC for the project</b>	
Lighting Retrofit Project - Internal Fixtures	Application Id 2000130	Current Status Pre-Project Application Saved As Draft	Lead LDC TORONTO HYDRO-ELECTRIC SYSTEM LIMITED	Head Office App ✗

Below the details is a progress bar with five stages: Pre-Project Application (active), Pre-Project Review, Post-Project Submission, Post-Project Review, and Project Closed. On the left side, a sidebar menu lists application sections: Manage Facilities, Applicant Details, Applicant Representative Details, Basic Details, and Estimated Calculation Results. Green lines connect the callout labels to their respective elements in the interface.

The project phase is displayed in the progress bar.

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

# Creating an Application

## Beginning the Application

**Note:** An Applicant Representative needs to complete the additional step of selecting an Applicant before beginning the application.

The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.

**Select an Applicant**

Applicant's Email Address \*  
yuhe.yuan@ieso.ca

SEARCH

First Name Yuhe  
Last Name Yuan

COMPLETE THE APPLICATION MYSELF

Enter the Applicant's email address.

Click **SEARCH**.

Click **COMPLETE THE APPLICATION MYSELF**.

A screenshot of a web form titled "Select an Applicant". At the top, a note states: "The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee." Below this, the form has a section "Select an Applicant" with a sub-section "Applicant's Email Address \*". A text input field contains "yuhe.yuan@ieso.ca". To the right of the input field are two labels: "First Name Yuhe" and "Last Name Yuan". Below the input field is a "SEARCH" button. At the bottom right of the form is a green button labeled "COMPLETE THE APPLICATION MYSELF". Three green callout lines with circular endpoints point to the email input field, the "SEARCH" button, and the "COMPLETE THE APPLICATION MYSELF" button. Below each callout is a text instruction: "Enter the Applicant's email address.", "Click SEARCH.", and "Click COMPLETE THE APPLICATION MYSELF." respectively.

# 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.

**▼ Applicant Details**

<b>Company *</b> Acme Electric				<b>Address 1 *</b> 120 Adelaide	
<b>First Name</b>	Chris	<b>Last Name</b>	Montgomery	<b>Address 2/Unit #</b>	<b>Address 3</b>
<b>Email</b>	chris.montgomery@ieso.ca	<b>Phone Number</b>	4165555555	<b>City *</b>	<b>Province *</b>
				Toronto	Ontario
				<b>Postal Code *</b>	
				M6E3H8	

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

**▼ Applicant Representative Details**

<b>First Name</b>	Michael	<b>Last Name</b>	Tsao
<b>Email</b>	michael.tsao@ieso.ca	<b>Phone Number</b>	1234567890

# Creating an Application

## Adding Basic Details

Complete the mandatory fields in the **Basic Details** section.

Enter a project name.

**Basic Details**

**Project Name \***  
Lighting Retrofit Project - Internal Fixtures

**Project Description \***  
Replace lighting with Retrofit options

**Have you received any other financial incentives for this project by any other public program? \***  
Y  N

**Funding Comments \***

**Estimated Project Start Date** Mar 10, 2019 **Estimated Project End Date** Mar 10, 2019

**Lead LDC**  
TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

**Funding Provider(s) \***

**Name of Program(s) \***

**Total Funding Amount \***

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.

# Creating an Application

## Adding Basic Details

**Note:** For a multi-site/Head Office project, you need to designate a **Lead LDC**.

The screenshot shows a web form titled "Basic Details". It includes the following fields and options:

- Project Name \***: Multi Site Demonstration
- Project Description \***: Lighting Retrofits across many facilities
- Have you received any other financial incentives for this project by any other public program? \***: Radio buttons for **Y** and **N**.
- Estimated Project Start Date**: Nov 7, 2018
- Estimated Project End Date**: Nov 15, 2018
- Lead LDC \***: A dropdown menu with the following options:
  - TORONTO HYDRO-ELECTRIC SYSTEM LIMITED (highlighted with a green bar)
  - Select an LDC —
  - ALECTRA UTILITIES CORPORATION
  - TORONTO HYDRO-ELECTRIC SYSTEM LIMITED
  - No Lead LDC
- Estimated Calculation Results**: A section with a "Comment" field.

If you select **No Lead LDC**, each LDC will receive a separate application that includes their respective facilities.

Select a Lead LDC.

# Creating an Application

## Adding Facilities

**01** Click **ADD NEW FACILITY**.

The screenshot shows a table titled "Manage Facilities" with columns for Facility Name, Address 1, City, Estimated Facility Capped Incentive Amount, Project Description, and Status. The table is currently empty, displaying "No items available". A green line points from the "ADD NEW FACILITY" button in the bottom right corner to the text in step 01.

**02** Complete the mandatory fields in the **Basic Details** section.

The screenshot shows the "Basic Details" form with the following fields and annotations:

- Facility Name \***: Enter the facility name.
- Facility Type \***: Select the facility type.
- Ownership Type \***: Select the ownership type.
- Address 1 \***, **Address 2**, **Address 3**: Enter the facility address, including the city, province and postal code.
- City \***, **Province** (dropdown): Enter the facility address, including the city, province and postal code.
- Postal Code \***: Enter the facility address, including the city, province and postal code.
- Local Distribution Company \***: Select the local distribution company the facility belongs to.
- Electric Utility Account \***: Enter the electric utility account number.
- Estimated Project Start Date \***: Select an estimated project start date.
- Description \***: Enter a project description.
- Estimated Project End Date \***: Select an estimated project end date.

# Creating an Application

## Adding Facilities

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

Click **Find Existing Facility**.

Enter facility information in any of the search fields.

**Find Existing Facility**

<p>Application Name</p> <input type="text"/> <p>City</p> <input type="text"/>	<p>Facility Name</p> <input type="text"/> <p>Address 1</p> <input type="text"/>
---	---

Click **SEARCH**.

Select the facility from the facilities list.

Facilities			
Name	Application Name	Address 1	City
No items available			

**03** Click **ADD NEW PRESCRIPTIVE MEASURE**, if you want to include prescriptive measures. If not, continue to **step 9**.

**Manage Prescriptive Measures**

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status
No items available					

# Creating an Application

## Adding Facilities

**04** Complete the mandatory fields in the **Basic Details** section.

**Annotations:**

- 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.
- Enter the model number.

**Form Fields and Values:**

- Measure Category:** Lighting
- End Use:** Lighting - Large Office
- Conservation Measure Name:** INTEGRAL LED FIXTURE RETROFIT KIT
- Conservation Measure Description:** 2' x 4' LED troffer or 4' LED linear ambient fixture (>= 3000 Lumens)
- Incentive Per Unit:** \$35.00
- Eligibility Criteria:** The product must be categorized by the Design Lights Consortium List (DLC) as a "Indoor Retrofit Kit - Troffer" or "Indoor Retrofit Kit - Linear Ambient" and the product must be approved and listed on the DLC Qualified Products List.
- Assumed Base Case:** Three-lamp Std. T8 fixtures (4' 32W)
- Manufacturer:** [Input field]
- Estimated Quantity:** 1000
- Measure Unit:** per troffer retrofit kit
- Model Number:** 14326h
- ES DLC Code:** [Input field]
- Calculated Values:**
  - kW Reduction: 44,200 kW
  - kWh Savings: 190,413,600 kWh
  - Estimated Incentive: \$35,000.00

**Buttons:** CANCEL, DELETE, SAVE TO DRAFT, APPLY

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

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

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

**05** Click **APPLY** to submit the measure.



# Creating an Application

## Adding Facilities

The measure will now appear in the prescriptive measures summary.

Click here to edit the measure.

Measure Category	Measure Name	Measure Description	Estimated Quantity	Estimated Calculated Incentive Amount	Status
Lighting	INTEGRAL LED FIXTURE RETROFIT KIT	2' x 4' LED troffer or 4' LED linear ambient fixture (>= 3000 Lumens)	1000	\$35,000.00	Complete → ✖

The status of the measure is complete.

Click here to **delete** the measure.

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

**06** Repeat steps 3-5 until you have added all the required prescriptive measures.

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

**08** Click **RECALCULATE**.

Estimated Facility Cost Prescriptive \*

Prescriptive measure costs are limited to the equipment purchased and installed, labour for the installation of the equipment by suppliers and costs to dispose of or decommission the replaced equipment.

ADD NEW PRESCRIPTIVE MEASURE

**RECALCULATE**

You must click recalculate before continuing

# Creating an Application

## Adding Facilities

**09** Click **ADD NEW CUSTOM MEASURE**, if you want to include custom measures. If not, continue to **step 13**.

▼ **Manage Custom Measures**

Custom Measure Category	Custom Measure Name	Estimated Calculated Incentive Amount	Estimated kWh Savings	Estimated kW Reduction	Status
No items available					

**ADD NEW CUSTOM MEASURE**

**10** Complete the mandatory fields in the **Basic Details** section.

Enter the measure name.

Select the measure category.

Enter the manufacturer.

Enter the model number.

Enter the base case description.

Enter the energy efficient case description.

▼ **Basic Details**

**Custom Measure Name \***  
Exterior Lighting

**Category \***  
Lighting

**Base Case Description \***  
Retrofit replacement of all exterior lighting to hi efficiency

**Manufacturer \***  
XYZ

**Model Number \***  
123-ret

**Energy Efficient Case Description \***  
Saving 40% of energy required - LED streetlights and parking lots

# Creating an Application

## Adding Facilities

**11** Complete the mandatory fields in the **Other Details** section.

The screenshot shows a form titled "Other Details" with the following fields and annotations:

- Estimated Base Case Consumption (kWh) \***: 1000000000. Annotation: "Enter the estimated base case consumption."
- Estimated Energy Efficient Case Consumption (kWh) \***: 999999. Annotation: "Enter the estimated energy efficient case consumption."
- Estimated Consumption Savings**: 99,000,001.000 kWh. Annotation: "The estimated consumption savings is automatically calculated based on the consumption estimates."
- Estimated Custom Measure Installation Cost \***: 700000. Annotation: "Enter the estimated Measure installation costs and custom equipment costs"
- Estimated Equipment Cost \***: 500000. Annotation: "Enter the estimated Measure installation costs and custom equipment costs"
- Estimated Base Case Demand (kW) \***: 10. Annotation: "Enter the estimated base case demand."
- Estimated Energy Efficient Case Demand (kW) \***: 10. Annotation: "Enter the estimated energy efficient case demand."
- Estimated Demand Reduction**: 0.000 kW. Annotation: "The estimated demand reduction and incentive amount are calculated based on the demand estimates."
- Estimated Calculated Incentive Amount**: \$4,950,000.05. Annotation: "The estimated demand reduction and incentive amount are calculated based on the demand estimates."
- Buttons**: "CANCEL", "SAVE TO DRAFT", and "APPLY". Annotation: "Click **SAVE** if you want to save a draft of the measure."

**12** Click **APPLY** to submit the measure.

# Creating an Application

## Adding Facilities

The measure will now appear in the custom measures summary.

Custom Measure Category	Custom Measure Name	Estimated Calculated Incentive Amount	Estimated kWh Savings	Estimated kW Reduction	Status
Lighting	Exterior Lighting	\$0.05	1	0	Complete

Click here to edit the measure.

The measure status is **complete**.

Click here to delete the measure.

ADD NEW CUSTOM MEASURE

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

Once all measures have been added, upload any required documents for the facility, such as specification sheets or vendor quotations.

### 13 Click **UPLOAD**.

Upload Files

UPLOAD Drop files here

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

# Creating an Application

## Adding Facilities

**14** Double-click the document you want to attach.

The document will now appear in the facility document summary.

**Upload Documents for Facility**

Upload Files

Test Document  
DOCX - 12.33 KB

Drop files here

Creation User  
Yuhe Yuan

Creation Date  
11/7/2018 1:54 PM EST

Click here to delete the document.

Click here to add another document if required.

The creation user and creation date fields are automatically populated.

**15** Review the **Estimated Calculation Results** section.

**Estimated Calculation Results**

	Estimated Eligible Costs	Estimated Energy Savings (kWh)	Estimated Demand Reduction (kW)	Estimated Incentive
Prescriptive	\$42,000.00	190,413.600	44,200	\$35,000.00
Custom	\$1,200,000.00	4,000,001.000	500,000	\$200,000.05
<b>Total</b>	<b>\$1,242,000.00</b>	<b>4,190,414.600</b>	<b>544,200</b>	<b>\$235,000.05</b>

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

CANCEL DELETE DUPLICATE FACILITY SAVE TO DRAFT APPLY

Click **SAVE** if you want to save a draft of the facility.

**16** Click **APPLY** to submit the facility.

**Note:** You will be blocked from submitting a facility if it does not meet the minimum energy reduction or energy savings requirements.

# Creating an Application

## Adding Facilities

The facility will now appear in the application facility summary.

Click here to edit the facility.

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status
IESO Adelaide	120 Adelaide Street	Toronto	\$235,000.05	Example	Complete →

ADD NEW 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**.

**17** Repeat steps 1–16 as required if your application includes more than one facility.

# Creating an Application

## 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.

▼ **Manage Facilities**

Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status
IESO Adelaide	120 Adelaide Street	Toronto	\$235,000.05	Example	Complete →

### 02 Click **DUPLICATE FACILITY**.

▼ **Estimated Calculation Results**

	Estimated Eligible Costs	Estimated Energy Savings (kWh)	Estimated Demand Reduction (kW)	Estimated Incentive
<b>Prescriptive</b>	\$42,000.00	190,413.600	44,200	\$35,000.00
<b>Custom</b>	\$1,200,000.00	4,000,001.000	500,000	\$200,000.05
<b>Total</b>	\$1,242,000.00	4,190,414.600	544,200	\$235,000.05

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

# Creating an Application

## Duplicating a Facility

### 03 Click YES.

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?

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.

▼ Manage Facilities

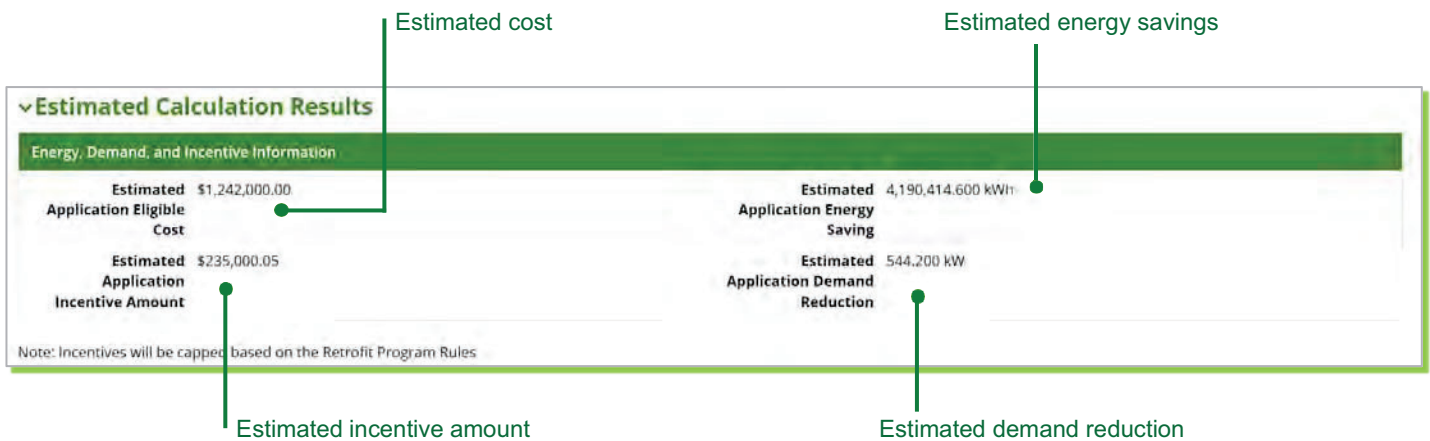
Facility Name	Address 1	City	Estimated Facility Capped Incentive Amount	Project Description	Status
IESO Adelaide	120 Adelaide	Toronto	\$350.00	Large Office Building	Complete →
IESO Adelaide	120 Adelaide	Toronto	\$350.00	Large Office Building	Incomplete →



# 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.

**Note:** Only an **Applicant** can submit the application. If an Applicant Representative creates the application, they must forward it to the Applicant, who submits it to the LDC.

**> History and Comments**

Comment

Enter a comment if required.

Click **SUBMIT TO APPLICANT**.

DELETED SAVE TO DRAFT SUBMIT TO APPLICANT

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

# Creating an Application

## Submitting the Application

**01** Enter a comment.

**02** Click **SUBMIT TO LDC**.

>History and Comments

Comment

DELETE

SAVE TO DRAFT

SUBMIT TO LDC

You can save a draft of the application if you are not ready to submit it.

**03** Select **Yes** to indicate that all the information in the application is correct.

**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.

**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

I have read and agree to the Participant Agreement. \*

Yes

BACK TO APPLICATION

SUBMIT TO LDC

**04** Select **Yes** to indicate that all the information in the application is correct.  
Click **SUBMIT TO LDC**.

**05**

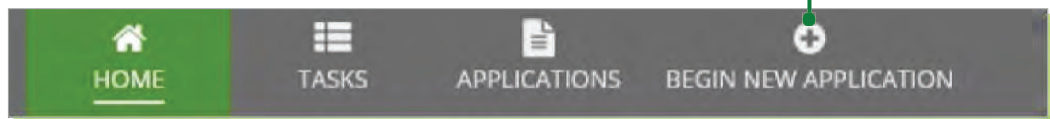
The LDC will now receive an email notification to review the application.

**Note:** For a multi-site project, the Lead **LDC** receives the application.

# 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**.



## Starting the RETROFIT PROGRAM Application Process

Both the Applicant and Applicant Representative must have registered for a User Account before they can be designated within this Application. If either the Applicant or Applicant Representative has not registered for a User Account please have them create one before designating them in the following Application.

The Applicant must be the building owner or lessee or have contractual authority to bind the owner or lessee.

SELECT AN APP REP TO CONTINUE THE APPLICATION

COMPLETE THE APPLICATION MYSELF

**02** Click **SELECT AN APP REP TO CONTINUE THE APPLICATION**.

## Assigning an Application to an Applicant Representative

**03** Enter the Applicant Representative's email address.

**Begin a Retrofit Application**

**Select an Applicant Representative (Optional)**

App Rep's Email Address  
apprep1@ieso.ca

First Name AppRep  
Last Name 1

SEARCH

CANCEL

CONTINUE TO APPLICATION SEND TO APP REP

You can begin work on the application before assigning it to the Applicant Representative.

**04** Click **SEARCH**.

**05** Click **SEND TO APP REP**.

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

# Assigning an Application to an Applicant Representative

If you've already started an application, you can still assign it to an Applicant Representative.

**01** Click **Applicant Representative Details**.

▼ **Applicant Representative Details**

(OPTIONAL) Add a new App Rep by Email

michael.tsao@ieso.ca

First Name Michael  
Last Name Tsao

**02** Enter the Applicant Representative's email address.

**03** Click **SEND TO APP REP**.

SAVE SEND TO APP REP SUBMIT TO LDC

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

**Note:** You can remove the Applicant Representative from the application at any time.

Click **Applicant Representative Details**.

Select **Yes**.

▼ **Applicant Representative Details**

<b>First Name</b>	Michael	<b>Last Name</b>	Tsao
<b>Email</b>	michael.tsao@ieso.ca	<b>Phone Number</b>	1234567890

**Do you want to remove applicant representative from current application?**

Yes  No

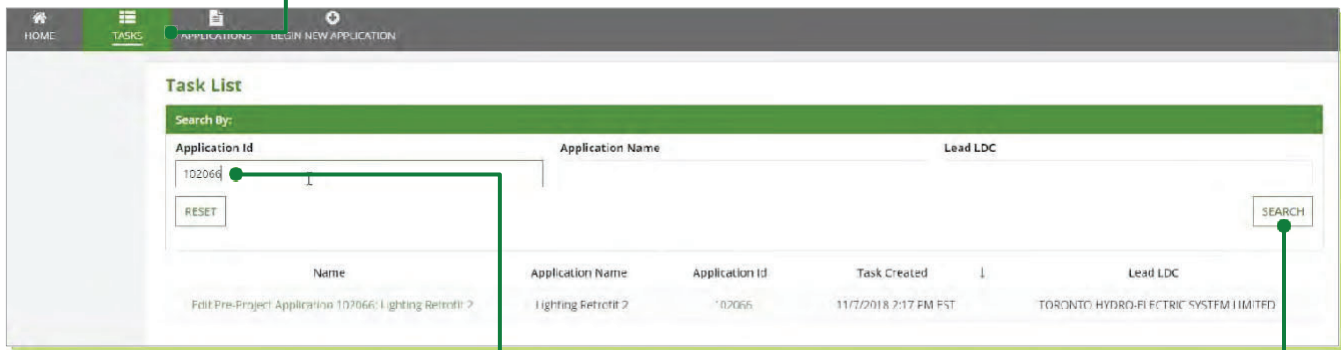
(OPTIONAL) Add a new App Rep by Email

I

# Reviewing an Application from an Applicant Representative

The **Applicant** must review an application that is completed by an Applicant Representative before submitting it to the LDC.

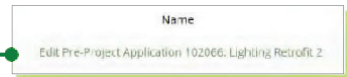
## 01 Click **TASKS**.



## 02 Enter the application ID.

## 03 Click **SEARCH**.

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



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

## 06 Enter a comment.

Click **SEND TO APP REP** to return the application to the Applicant Representative, if required.

# Reviewing an Application from an Applicant Representative



**07** Click **SUBMIT TO LDC**.

**08** Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agreed 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.

<b>PRIOR TO</b> Commencing your Project(s) Ensure that the LDC has pre-approved this Application and your Participant Agreement	<b>AFTER</b> 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

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

BACK TO APPLICATION      SUBMIT TO LDC

**09** Select whether you want all communication regarding the application to be sent to your Applicant Representative.

**10** Click **SUBMIT TO LDC**.

The LDC will now receive an email notification to review the application.

# Recalling an Application

The **Applicant** can recall an application that has been submitted to the LDC for approval.

**01** Click **APPLICATIONS**.

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	LDC
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM	\$60,000.00	Pre-Project Application Submitted For Approval	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

**02** Enter the application ID.

**03** Click **SEARCH**.

**04** Click the application ID.

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM

**05** Click **Related Actions**.

**06** Click **Recall Application**.

**Retrofit Application: Lighting Retrofit 2**

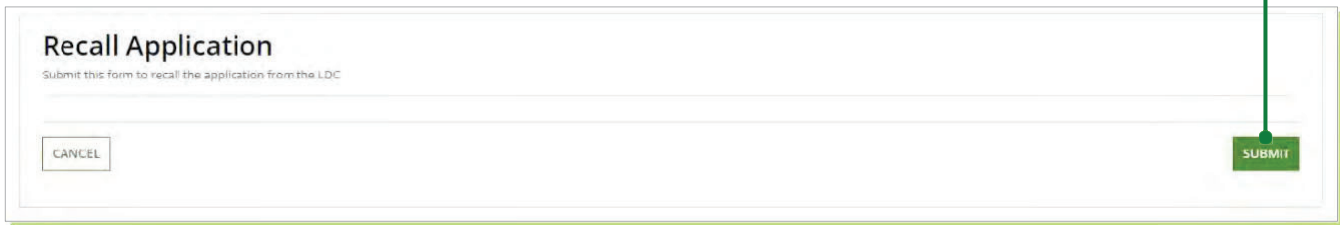
Summary **Related Actions**

**Recall Application**  
Related action process to recall the application



## Recalling an Application

**07** Click **SUBMIT**.



Recall Application  
Submit this form to recall the application from the LDC.

CANCEL SUBMIT

**08** Click **YES**.



Submitting this related action will recall the application from the LDC. Continue?

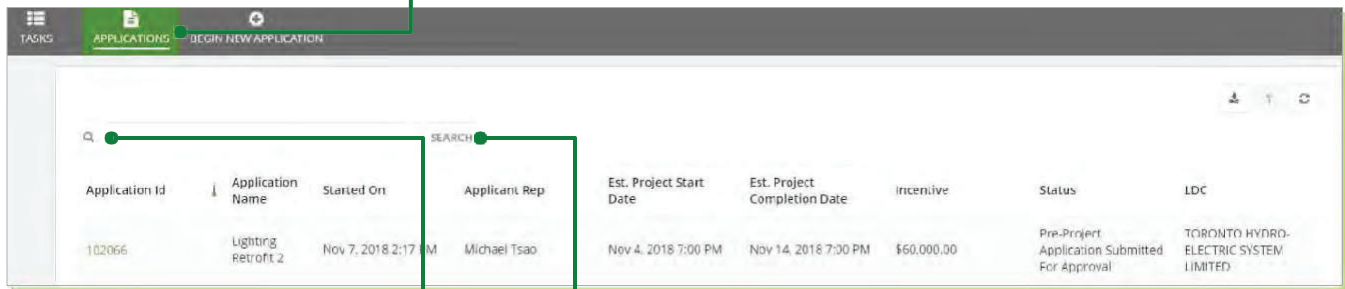
NO YES

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 LDC for approval.

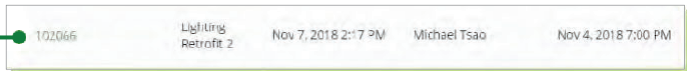
## 01 Click APPLICATIONS.



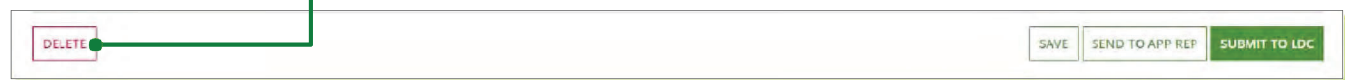
## 02 Enter the application ID.

## 03 Click SEARCH.

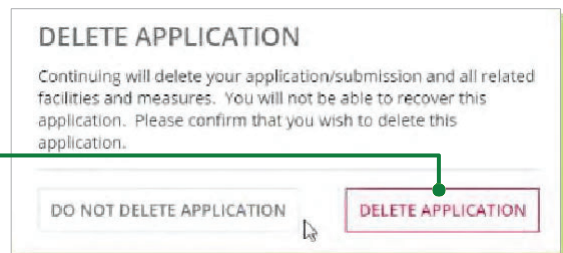
## 04 Click the application ID.



## 05 Click DELETE.



## 06 Click DELETE APPLICATION.



This final step removes the application from the system.

# Copying an Application

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

## 01 Click APPLICATIONS.

The screenshot shows the top navigation bar with the 'APPLICATIONS' menu item highlighted. Below it is a table of applications.

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	LDC
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM	\$60,000.00	Pre-Project Application Submitted For Approval	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

## 02 Enter the application ID.

## 03 Click SEARCH.

## 04 Click the application ID.

The screenshot shows a single row from the application table with the application ID '102066' highlighted.

102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
--------	---------------------	---------------------	--------------	---------------------

## 05 Click Related Actions.

The screenshot shows the 'Related Actions' panel for the application 'Retrofit Application: Lighting Retrofit 2'. It contains two actions: 'Recall Application' and 'Copy Application'.

### Retrofit Application: Lighting Retrofit 2


Summary | **Related Actions**

- Recall Application**  
Related action process to recall the application
- Copy Application**  
Click to copy this application

## 06 Click Copy Application.

## Copying an Application

**07** Click YES.



Are you sure you want to copy this application?

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 LDC Requests Post-Submission

## Editing an Application

The LDC may return an application with recommended edits. The **Applicant** or **Applicant Representative** makes the required changes.

### 01 Click APPLICATIONS.

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	LDC
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM	\$60,000.00	Pre-Project Application Submitted For Approval	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

### 02 Enter the application ID.

### 03 Click SEARCH.

### 04 Click the application ID.

102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
--------	---------------------	---------------------	--------------	---------------------

# Responding to LDC Requests Post-Submission

## Editing an Application

**05** Click **History and Comments** to review any LDC comments.

History and Comments

User	User Role	Action Type	Action	Submitted To	Date and Time (EST)	Comment
Dhaval Vyas	Toronto Hydro-electric System Limited Lead LDC Analyst	Lead LDC Comment	Recommend Edits	None	11/09/2018 02:14 PM	Please update the Project Description
Dhaval Vyas	Toronto Hydro-electric System Limited Lead LDC Analyst	Lead LDC Comment	Allow LDC Edits	None	11/09/2018 02:13 PM	

The **Recommend Edits** action indicates that the LDC has suggested edits.

The required edits are described in the **Comment** column.

**06** Click **EDIT RETURNED APPLICATION**

Retrofit Application: Lighting Retrofit 2

Summary Related Actions

EDIT RETURNED APPLICATION

# Responding to LDC Requests Post-Submission

## Editing an Application

**07** Make the required edits to the application.

**08** Enter a comment.

The screenshot shows a web interface section titled '> History and Comments'. Below the title is a 'Comment' label and a text input field containing the text 'Please review'. At the bottom of the section, there are three buttons: 'DELETE', 'SAVE', and 'SEND TO APP REP'. To the right of these is a green button labeled 'SUBMIT TO LDC'. Green lines with circular endpoints point from the text '08 Enter a comment.' to the text input field, and from '09 Click SUBMIT TO LDC.' to the 'SUBMIT TO LDC' button.

**09** Click **SUBMIT TO LDC**.

# Responding to LDC Requests Post-Submission

## Editing an Application

**10** Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agreed 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.

<b>PRIOR TO</b> Commencing your Project(s) Ensure that the LDC has pre-approved this Application and your Participant Agreement	<b>AFTER</b> 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. \* **Participant Agreement**

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

[BACK TO APPLICATION](#) [SUBMIT TO LDC](#)

**11** Select whether you want all communication regarding the application to be sent to your Applicant Representative.

**12** Click **SUBMIT TO LDC**.

The application will now be forwarded to the LDC for review.



# Responding to LDC Requests Post-Submission

## Approving an Edited Application

The LDC may edit the application during the review process, rather than returning it to be edited. The **Applicant** reviews and approves the changes made by the LDC.

### 01 Click APPLICATIONS

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	LDC
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM	\$60,000.00	Pre-Project Application Submitted For Approval	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

### 02 Enter the application ID.

### 03 Click SEARCH.

### 04 Click the application ID.

102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
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# Responding to LDC Requests Post-Submission

## Approving an Edited Application

**05** Click **History and Comments** to review any LDC

History and Comments

User	User Role	Action Type	Action	Submitted To	Date and Time (EST)	Comment
Dhaval Vyas	Toronto Hydro-electric System Limited Lead LDC Analyst	Lead LDC Comment	Recommend Edits	None	11/09/2018 02:14 PM	Updated the Project Description
Dhaval Vyas	Toronto Hydro-electric System Limited Lead LDC Analyst	Lead LDC Comment	Allow LDC Edits	None	11/09/2018 02:13 PM	

The **Recommend Edits** action indicates that the LDC edited the application.

The edits made by the LDC are described in the **Comment** column.

**Note:** You can also review any changes made to the application in the **Updated Fields** section.

Updated Fields

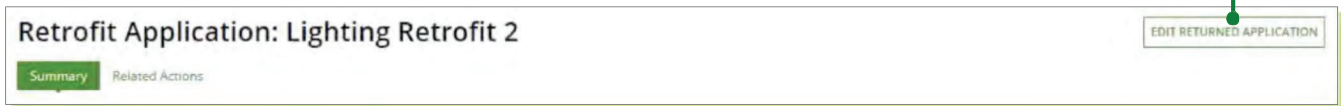
Field Name	Old Value	New Value
Other Financial Incentives	N	Y

**06** Review the changes made by the LDC.

# Responding to LDC Requests Post-Submission

## Approving an Edited Application

**07** Click **EDIT RETURNED APPLICATION**.



**08** Click **SUBMIT TO LDC**.



# Responding to LDC Requests Post-Submission

## Approving an Edited Application

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

The screenshot shows a web form titled "Application Approval". At the top, it states: "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 comment your Project prior to receiving pre-approval, you will not be eligible to receive a Participant Incentive." Below this are two columns: "PRIOR TO Completing your Project(s)" with the instruction "Ensure that the LDC has pre-approved this Application and your Participant Agreement", and "AFTER Completing your Project(s)" with the instruction "You must submit evidence of Project completion in order to receive your Participant Incentive". The main form contains three sections of radio button questions. The first is "I hereby certify that all information entered on this application is correct and accurate to the best of my knowledge. \*", with "Yes" selected. The second is "I have read and agree to the Participant Agreement. \*", with "Yes" selected. The third is "From now all communication for this application should go to my App Rep.", with "No" selected. At the bottom are two buttons: "BACK TO APPLICATION" and "SUBMIT TO LDC". Green lines connect the text in step 09 to the "Yes" radio buttons, and a line connects step 11 to the "SUBMIT TO LDC" button.

**10** Select whether you want all communication regarding the application to be sent to your Applicant Representative.

**11** Click **SUBMIT TO LDC**.

The application will now be forwarded to the LDC for review.

# Submitting an Advance Incentive Notice

The **Applicant** or **Applicant Representative** can submit an advance incentive notice once the application has been approved by the LDC, if the project meets the advance incentive criteria.

## 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.

**Basic Details**

Facility Name \*  
Social Housing Adder and advance

Facility Type \*  
Multi-Residential - Social Housing Provider

Ownership Type \*  
--Select a value--

Electric Utility Account \*

Address 1 \*  
120 Adelaide St.

Address 2

Address 3

City \*  
Province  
ON

Postal Code \*

Local Distribution Company \*  
--Select an LDC--

Are you applying for a Social Housing Adder? \*  
 Y  N

What percentage of your incentive do you want to receive in advance? % \*

**02** Select Y.

**03** Enter the percentage of the incentive you want to receive in advance. The maximum is 50%.

# Submitting an Advance Incentive Notice

## Applying for a Social Housing Incentive

Estimated Calculation Results

	Estimated Eligible Costs	Estimated Energy Savings (kWh)	Estimated Demand Reduction (kW)	Estimated Incentive
Prescriptive	\$10,000.00	6,074.640	2.340	\$900.00
Custom	\$0.00	0.000	0.000	\$0.00
<b>Total</b>	<b>\$10,000.00</b>	<b>6,074.640</b>	<b>2.340</b>	<b>\$900.00</b>

Advance Incentive		Advance Incentive	
Total Advance Incentive	\$0.00	Max SHA Advance Incentive	\$900.00
Estimated Advance Amount	\$900.00	Approved SHA Advance Incentive	\$0

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. 23).

The application will now include the request for a social housing advance incentive.

## Applying for a Monitoring and Targeting Incentive

You can apply for a **monitoring and targeting incentive** 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.

Category \*

M&T

# Submitting an Advance Incentive Notice

## Applying for a Monitoring and Targeting Incentive

### 02 Select Yes

<b>M&amp;T Advance Incentive Requested</b>	<b>Maximum M&amp;T Advance Incentive</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No	\$0

### 03 Complete the mandatory fields in the **Other Details** section.

**Other Details**

<b>Estimated Base Case Consumption (kWh) *</b> 100000	<b>Estimated Base Case Demand (kW) *</b> 0
<b>Estimated Energy Efficient Case Consumption (kWh) *</b> 0	<b>Estimated Energy Efficient Case Demand (kW) *</b> 0
<b>Estimated Consumption Savings</b> 100,000.000 kWh	<b>Estimated Demand Reduction</b> 0.000 kW
<b>Estimated Custom Measure Installation Cost *</b> 100000	<b>Estimated Calculated Incentive Amount</b> \$10,000.00
<small>Please enter all other eligible costs including labour, design, project management, shipping, delivery, duties, disposal, inspection, and Measurement and Verification (M&amp;V)</small>	<small>Calculated Incentive is based upon Consumption (kWh)</small>
<b>Estimated Equipment Cost *</b> 100000	
<small>Please enter equipment cost</small>	

CANCEL SAVE **SUBMIT**

### 04 Click **SUBMIT**.

# Submitting an Advance Incentive Notice

## Applying for a Monitoring and Targeting Incentive

When you submit the measure, the value of the M&T advance incentive is automatically calculated. The amount will be 35% of your calculated incentive.

<b>Custom Measure Name *</b>	
Unnamed Custom Measure	
<b>Category *</b>	
M&T	
<b>M&amp;T Advance Incentive Requested</b>	<b>Maximum M&amp;T Advance Incentive</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No	\$3,500.00

**05** Complete the rest of the facility information and submit the facility (See **Adding Facilities** on p. 23).

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.

## 01 Click APPLICATIONS

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	LDC
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM	\$60,000.00	Pre-Project Application Submitted For Approval	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

## 02 Enter the application ID.

## 03 Click SEARCH.

## 04 Click the application ID.

102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
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## 05 Review the advance incentive details in the **Estimated Calculation Results** section of the application.

~ Estimated Calculation Results

	Estimated Eligible Costs	Estimated Energy Savings (kWh)	Estimated Demand Reduction (kW)	Estimated Incentive
Prescriptive	\$10,000.00	6,074.640	2.340	\$900.00
Custom	\$0.00	0.000	0.000	\$0.00
<b>Total</b>	<b>\$10,000.00</b>	<b>6,074.640</b>	<b>2.340</b>	<b>\$900.00</b>

Advance Incentive			
Total Advance Incentive	\$0.00	Max SHA Advance Incentive	\$900.00
Estimated Advance Amount	\$900.00	Approved SHA Advance Incentive	\$0

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

# Submitting an Advance Incentive Invoice

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

Retrofit Application: Lighting

Summary Related Actions

SUBMIT/EDIT ADVANCE INCENTIVE INVOICE PREPARE POST-PROJECT SUBMISSION

**07** Click **UPLOAD**.

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

Application Invoice Submission

Invoice Amount \$500.00

Lighting

Advance Incentive Invoice \*

Comment

CANCEL SUBMIT TO LDC

UPLOAD Drop file here

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

**09** Enter a comment.

**10** Click **SUBMIT TO LDC**.

The LDC 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 LDC.

**01** Click **APPLICATIONS**.

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	LDC
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM	\$60,000.00	Pre-Project Application Submitted For Approval	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

**02** Enter the application ID.

**03** Click **SEARCH**.

**04** Click the application ID.

102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
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# Amending an Approved Application

**05** Click **Related Actions**.



**06** Click **Initiate Application Amendment**.

**07** Enter a reason for the amendment.



**08** Click **INITIATE**.

# Amending an Approved Application

**09** Click YES.

This Amendment is subject to LDC approval. Are you sure, you want to continue?

**10** Make any required changes to the application.

**11** Enter a comment.

> History and Comments

Comment

I certify that work for this Application has not been started -

> Invoice Documents

Invoice Type	Invoice Accepted	Upload Date	Document Name
Initial	<input checked="" type="checkbox"/>	11/12/2018 1:31 PM EST	Test Invoice.docx

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

**13** Click **SUBMIT TO LDC**.

# 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 LDC.

Enter a comment if required.

Click **SUBMIT TO APPLICANT**.

The Applicant will receive an email notification to complete the application.

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

**15** Select whether you want all communication regarding the application to be sent to your Applicant Representative.

**16** Click **SUBMIT TO LDC**.

The LDC 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.

## Beginning the Submission

### 01 Click APPLICATIONS

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	LDC
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM	\$60,000.00	Pre-Project Application Submitted For Approval	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

### 02 Enter the application ID.

### 03 Click SEARCH.

### 04 Click the application ID.

102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
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### 05 Click PREPARE POST-PROJECT SUBMISSION.

Retrofit Application: Lighting Retrofit 2

SUBMIT/EDIT ADVANCE INCENT... PREPARE POST-PROJECT SUBMIS...

### 06 Click COMPLETE THE APPLICATION MYSELF.

Prepare Post-Project Submission

CANCEL COMPLETE THE APPLICATION MYSELF

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 a facility.

▼ Manage Facilities

Updated?	Facility Name	Address 1	City	Actual Facility Capped Incentive Amount	Project Description	Status
No	IESO Lighting	120 Adelaide	Toronto	\$0	Lighting Retrofit	Incomplete →

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

▼ Basic Details

**Facility Name** IESO Lighting **Address 1** 120 Adelaide  
**Facility Type** Commercial - Large Office **Ownership Type** Owner **Address 2**  
**Electric Utility Account** 35135135 **City** Toronto **Province** ON **Postal Code** M5A1R1  
**Local Distribution Company** TORONTO HYDRO-ELECTRIC SYSTEM LIMITED  
**Actual Project Start Date \***  **Actual Project End Date \*** mm/dd/yyyy  
Estimated value: 11/5/2018 Estimated value: 11/15/2018  
**Description** Lighting Retrofit

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

# 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**.

Prescriptive Measures						
Updated?	Measure Category	Measure Name	Measure Description	Actual Quantity	Actual Calculated Incentive Amount	Status
No	Lighting	INTEGRAL LED TROFFERS	2' x 2' LED troffer (= 2000 Lumens)	20	\$700.00	Complete  

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

**05** Update any other mandatory fields as required.

Basic Details	
<b>Measure Category</b>	Lighting
<b>End Use</b>	Lighting -Large Office
<b>Conservation Measure Name</b>	INTEGRAL LED TROFFERS
<b>Conservation Measure Description</b>	2' x 2' LED troffer (= 2000 Lumens)
<b>Incentive Per Unit</b>	\$35.00
<b>Eligibility Criteria</b>	The product must be categorized by the Design Lights Consortium List (DLC) as a "Indoor Luminaires - Troffer" and the product must be approved and listed on the DLC Qualified Products List.
<b>Assumed Base Case</b>	Ubend 32W- 2 lamp T8
<b>Manufacturer *</b>	XYZ
<b>Actual Quantity *</b>	20
	Estimated value: 25.000
<b>Model Number *</b>	123
<b>ES DLC Code</b>	XGD3513
<b>kW Reduction</b>	0.520 kW
	Estimated value: 0.650
<b>kWh Savings</b>	1877.2
	Estimated value: 2,346.500
<b>Actual Incentive</b>	\$700.00
	Estimated value: 875.000

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 **SUBMIT** to submit the measure.

Click **SAVE** 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.

Updated?	Measure Category	Measure Name	Measure Description	Actual Quantity	Actual Calculated Incentive Amount	Status
No	Lighting	INTEGRAL LED TROFFERS	2' x 2' LED troffer (= 2000 Lumens)	20	\$700.00	Complete → ✕
No	Lighting	INTEGRAL LED TROFFERS RETROFIT KIT	2' x 2' LED troffer (= 2000 Lumens)	123	\$3,075.00	Complete → ✕

**Actual Facility Cost Prescriptive \***  
50000  
Estimated value: \$50,000.000

ADD NEW PRESCRIPTIVE MEASURE  
RECALCULATE



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**.

Custom Measures						
Updated?	Custom Measure Category	Custom Measure Name	Actual Calculated Incentive Amount	Actual kWh Savings	Actual kW Reduction	Status
No	Lighting	Exterior Lighting	\$0.00			Incomplete  

**11** Complete the mandatory fields in the **Other Details** section.

Enter the actual base case consumption.

Enter the actual energy efficient case consumption.

The actual consumption savings is automatically calculated based on the actual consumption values.

Other Details	
<p><b>Actual Base Case Consumption (kWh) *</b></p> <p>150000000</p> <p><small>Estimated value: 103,000,000,000kWh</small></p>	<p><b>Actual Base Case Demand (kW) *</b></p> <p>0</p> <p><small>Estimated value: 10,000kW</small></p>
<p><b>Actual Energy Efficient Case Consumption (kWh) *</b></p> <p>0</p> <p><small>Estimated value: 99,999,000kWh</small></p>	<p><b>Actual Energy Efficient Case Demand (kW) *</b></p> <p>0</p> <p><small>Estimated value: 10,000kW</small></p>
<p><b>Actual Consumption Savings</b></p> <p>150,000,000,000 kWh</p> <p><small>Estimated value: 99,000,001,000kWh</small></p>	<p><b>Actual Demand Reduction</b></p> <p>0,000 kW</p> <p><small>Estimated value: 0,000kW</small></p>
<p><b>Actual Custom Measure Installation Cost *</b></p> <p>700000</p> <p><small>Estimated value: \$70,000,000</small></p>	<p><b>Actual Calculated Incentive Amount *</b></p> <p>\$7,500,000.00</p> <p><small>Estimated value: 4,950,000,050. Actual Incentive based upon Consumption (kW)</small></p>
<p><b>Actual Equipment Cost *</b></p> <p>50000</p> <p><small>Estimated value: \$50,000,000</small></p>	

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.

Enter the actual base case demand.

# Creating a Post-Project Submission

## Entering Project Data

**12** Click **SUBMIT** to submit the measure.

**13** Repeat steps 9–12 until you have entered the data for all custom measures for the facility.

**14** Review the **Actual Calculation Results** section for your facility.

Actual Calculation Results

	Actual Eligible Costs	Actual Energy Savings (kWh)	Actual Demand Reduction (kW)	Actual Incentive
<b>Prescriptive</b>	\$0.00 Estimated value: \$0.000	0.000 Estimated value: 0.000kWh	0.000 Estimated value: 0.000kW	\$0.00 Estimated value: \$0.000
<b>Custom</b>	\$750,000.00 Estimated value: \$120,000.000	150,000,000.000 Estimated value: 99,000,001.000kWh	0.000 Estimated value: 0.000kW	\$375,000.00 Estimated value: \$60,000.000
<b>Total</b>	\$750,000.00 Estimated value: \$120,000.000	150,000,000.000 Estimated value: 99,000,001.000kWh	0.000 Estimated value: 0.000kW	\$66,000.00 Estimated value: \$60,000.000

**15** Click **SUBMIT** to submit the facility.

**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.

# Creating a Post-Project Submission

## Entering Project Data

**Note:** For a **multi-site application**, multi-site fees will automatically be calculated once all project data is entered.

▼ Manage Facilities

Updated?	Facility Name	Address 1	City	Actual Facility Capped Incentive Amount	Project Description	Status
No	IESO Toronto	120 Adelaide	Toronto	\$962.50	Lighting Retrofit in the Hallways	Complete →
No	IESO Mississauga	3230 Lakeshore East	Toronto	\$962.50	Lighting Retrofit in the Hallways	Complete →

Multi-Site Fees

LDC	Number of Facilities	Total MSA Fee
TORONTO HYDRO-ELECTRIC SYSTEM LIMITED	1	420
ALECTRA UTILITIES CORPORATION	1	420

## Submitting the Post-Project Submission

**01** Enter a comment.

Comment

SAVE
SEND TO APP REP
SUBMIT TO LDC

**02** Click **SUBMIT TO LDC**.

**Note:** Only an **Applicant** can submit the post-project submission. If an Applicant Representative creates the post-project submission, they must forward it to the Applicant, who submits it to the LDC.

# Creating a Post-Project Submission

## Submitting the Post-Project Submission

Enter a comment if required.

Click **SUBMIT TO APPLICANT**.

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

**03** Select **Yes** to indicate that all the information in the application is correct and to indicate that you have read and agreed 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.

<b>PRIOR TO</b> Commencing your Project(s) Ensure that the LDC has pre-approved this Application and your Participant Agreement	<b>AFTER</b> 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

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

[BACK TO APPLICATION](#) [SUBMIT TO LDC](#)

**04** Select whether you want all communication regarding the application to be sent to your Applicant Representative.

**05** Click **SUBMIT TO LDC**.

The LDC 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.

The screenshot displays a web interface for a project titled "Lighting Retrofit 2". The top section shows the project name and the "Application Id 102066". Below this, there are two main sections: "Pre-Project Application" and "Pre-Project Review". Under "Pre-Project Application", there is a section for "Application Version" with two radio button options: "Current" (which is selected) and "Pre-Approved". A green box highlights the "Current" option and the "Pre-Approved" option, with a line extending from the "Current" option down to the "Pre-Approved" option, suggesting a transition or comparison between the two states.



# Submitting an Invoice

The **Applicant** submits the invoice once the post-project submission has been approved by the LDC.

## 01 Click APPLICATIONS.

Application Id	Application Name	Started On	Applicant Rep	Est. Project Start Date	Est. Project Completion Date	Incentive	Status	LDC
102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM	Nov 14, 2018 7:00 PM	\$60,000.00	Pre-Project Application Submitted For Approval	TORONTO HYDRO-ELECTRIC SYSTEM LIMITED

## 02 Enter the application ID.

## 03 Click SEARCH.

## 04 Click the application ID.

102066	Lighting Retrofit 2	Nov 7, 2018 2:17 PM	Michael Tsao	Nov 4, 2018 7:00 PM
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## 05 Click SUBMIT/EDIT FINAL INVOICE.

**Retrofit Application: Multi Site Demonstration**

Summary Related Actions

SUBMIT/EDIT FINAL INVOICE

## Submitting an Invoice

**06** Click **UPLOAD**.

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

The screenshot shows a web form titled "Application Invoice Submission". At the top left, it displays "Invoice Amount \$1,925.00" and "Multi Site Demonstration". Below this is a "Comment" text area. In the center, there is a "Final Invoice\*" section with an "UPLOAD" button and a "Drop file here" field. At the bottom left is a "CANCEL" button, and at the bottom right is a green "SUBMIT TO LDC" button. Green callout lines connect the text instructions to these specific elements: one from "06 Click UPLOAD." to the "UPLOAD" button; one from "You can also drag a file to the Drop file here field." to the "Drop file here" field; and one from "09 Click SUBMIT TO LDC." to the "SUBMIT TO LDC" button.

**07** Double-click the invoice document you want to attach.

**08** Enter a comment.

**09** Click **SUBMIT TO LDC**.

The LDC will now receive an email notification to review the invoice.